



COMMUNITY PANELS USER GUIDE

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

The information herein describes Confirmit Community Panels and its features as of November 2010. New features may be introduced into Confirmit Community Panels after this date. Go to www.confirmit.com or check “News” on the Customer Extranet for the latest updates.

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What's New in this Issue?

Changes in this revision of the Confirmit Community Panels User Guide are as listed below. In addition, a number of illustrations have been changed to reflect changes in the user interface:

- The How to Create a New Community Panel section is added to the General Information chapter (go to How to Create a New Community Panel on page 3 for more information).
- The Unsubscribe section is added to the Panel Setup Menu chapter (go to Unsubscribe on page 13 for more information).
- The Variable Type property description is added to the Question Properties section (go to Question Properties on page 15 for more information).
- The export definition text is edited (go to Community Panel Definition Export on page 18 for more information).
- The Created Date and Modified Date are added to the Single Panelist Editor Details tab (go to The Details Tab on page 67 for more information).
- The subsections to the Current Rule section are updated (go to Current Rule on page 72 for more information).
- The Confirmit Survey Database section is added to the Source Tab section (go to Source Type > Survey Database on page 79 for more information).
- The Mapping Fields section is added to the Current Rule section (go to Mapping Fields on page 88 for more information).
- The Data section is added to the Panel Management chapter (go to Data on page 97 for more information).
- The Calculate Variables section is added to the Panel Management chapter (go to Calculate Variables on page 102 for more information).
- The Required Fields information is added to the Importing Panelist Credits procedure (go to How to Import Panelist Credits on page 103 for more information).
- The Exclusions Tab section and sub-documents are edited, illustrations are updated and some information is added (go to The Exclusions Tab on page 111 for more information).
- The How to Generate Sample Fill-in procedure is added to the Procedures in the Execution Tab section (go to How to Generate Sample Fill-in on page 144 for more information).
- The Data Source field is added to the Current Matrix General tab (go to The General Tab on page 157 for more information).
- The Combined Dimensions and How to Uncombine Dimensions sections are added to the Procedures in the Current Matrix Tab section (go to Procedures in the Current Matrix Tab on page 164 for more information).
- The Individual Rest Days property is added to the Sampling Settings General tab (go to The General Tab on page 187 for more information).

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

Important

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

1. 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 Confirmit you can build a library of panelist interfaces, called Community 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 Community Portal to answer new or previously started surveys, view their survey list, update their profile, view their points etc. All these actions are conducted via the same interface.

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.

Note: The Community Panel functionality is purchased as a separate add-on module within Confirmit.

Important

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

1.1. Recommended Limits

Note: The Community 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:
 - o On Premise - up to 10 million.
 - o On Demand - up to 5 million. Panels larger than this must be approved in advance by the Confirmit 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 – 1000.
- 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 by: the number of segments per dimension, multiplied (e.g. 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 $n1*n2*n3*n4*n5*n6*n7*n8$) = max 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:
 - o 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.
 - o Open text fields that are to be part of the BitStream files should be limited to 4 characters.

- o Note that Open text fields are not supported as segments in the sampling matrix.
- o To optimize the panel database: use Boolean data types and numeric precodes whenever possible, and numeric ranges between 0 and 255 should be specified.
- The “Panelist Registration Survey” flag in Project Overview 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).
- “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 Confirmit Support for further information.

2. General Information

2.1. How to Access Community Panels

You have two ways of accessing the Community Panels functionality:

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

In both cases, the Community Panel List page opens.

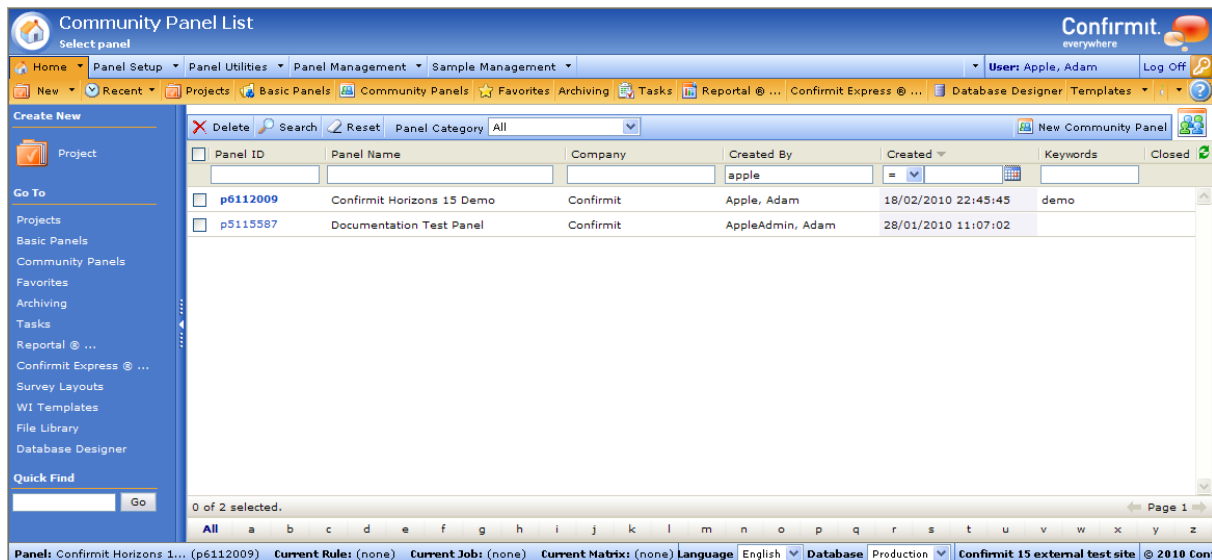


Figure 1 Example of the Community Panel List page

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 Confirmit 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 (go to Overview on page 22 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 Community Panel** button (go to How to Create a New Community Panel on page 3 for more information).

2.2. How to Create a New Community Panel

To create a new Community Panel:

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

The Name dialog opens.

Figure 2 The Community Panel Name dialog

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

The Select Language dialog opens.

Figure 3 The Select Language dialog

5. In the All Languages column, select the languages you wish to use for the panel and click the >> button to move them to the Selected Languages column.
6. On completion, click **Finish**.

The Community Panel is created and added to the list in the Community Panels List page.

2.3. 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. Confirmit 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.

2.4. Password Policy

As part of the continuous effort to ensure that Confermit 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 Community Portal modules all have 'Forgotten Password' functionality. This allows end users to trigger an email so they receive an activation link that opens a page where they can reset their password. Refer to the Confermit Authoring User Guide for further details.

All passwords are hashed and not transmitted in plain text, including those for panelists in Community Panel 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 Community Panels (go to The Panel Settings on page 105 for more information). Users may then define custom settings for a panel. Panelist passwords will be hashed, meaning that passwords will not be available in plain text. When panelists use the "Forgot password" feature, they will be sent an activation link which will open a page where they can reset their password.

On-Demand users:

The passwords for all areas of Confermit 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.
- **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 Confermit support if you wish to implement a stricter policy.

On-Premise users:

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

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

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

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

2.5. CATI Support

From Confirmit v15, Community 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 Community 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 Community 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 Community Portals database.

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

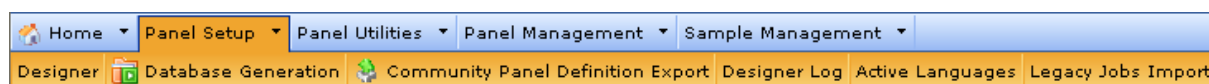


Figure 4 The Panel Setup menu commands

The menu commands are as follows:

- **Designer** – the database definition page (go to Designer on page 10 for more information).
- **Database Generation** – generates and updates the database (go to Database Generation on page 17 for more information).
- **Community Panel Definition Export** – export the database definition to another server (go to Community Panel Definition Export on page 18 for more information).
- **Designer Log** – a “read-only” log of the main events occurring in the panel (go to Designer Log on page 19 for more information).
- **Active Languages** – select the languages to be used (go to Active Languages on page 20 for more information).
- **Legacy Jobs Import** - allows company administrators to import legacy jobs into the Confirmit panel from other systems (go to Legacy Jobs Import on page 20 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 Community Panels functionality (go to How to Access Community Panels on page 3 for more information) the Panel Utilities menu appears as shown below.

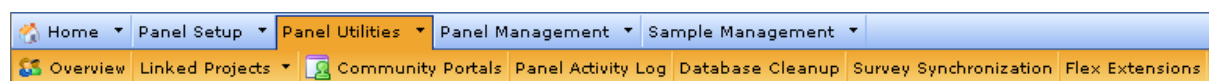


Figure 5 The Panel Utilities menu commands

The menu commands are as follows:

- **Overview** – provides general information on the selected panel (go to Overview on page 22 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 (go to Linked Projects on page 28 for more information).
- **Community Portals** – contains the commands you use to create and edit your Community Portals (go to Community Portals on page 30 for more information).
- **Panel Activity Log** – logs activity on the panel (go to Panel Activity Log on page 61 for more information).

- **Database Cleanup** – removes deleted questions from the Panel database (go to Database Cleanup on page 63 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 (go to Survey Synchronization on page 64 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 (go to Single Panelist Editor on page 65 for more information).
- **Multiple Panelist Editor** – enables you to edit the details of several/many panelists simultaneously (go to Multiple Panelist Editor on page 69 for more information).
- **Current Rule** – shows the details of the rule currently selected in the Rule List (go to Current Rule on page 72 for more information).
- **Current Rule Set** – provides details of the rule set currently selected in the Rule Set List (go to Current Rule Set on page 89 for more information).
- **Rule List** – displays a list of the available rules. Click on a rule to open it (go to Rule List on page 92 for more information).
- **Rule Set List** – displays a list of the available rule sets (go to Rule Set List on page 95 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 (go to Aggregated Variable List on page 96 for more information).
- **Panelist Credits** - allows you to import and export panelist credits (go to Panelist Credits on page 103 for more information).
- **Panel Settings** - allows you to define some custom settings for the panelists' password requirements (go to The Panel Settings on page 105 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.

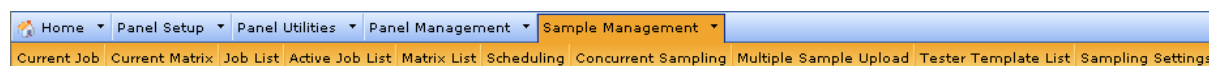


Figure 7 The Sample Management menu commands

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 (go to Current Job on page 107 for more information).
- **Current Matrix** – this window shows the details of the matrix currently selected in the Matrix List (go to Current Matrix on page 157 for more information).
- **Job List** – lists all the sampling jobs that you currently have “in progress” (go to Job List on page 172 for more information).
- **Active Job List** – lists all the sampling jobs that are currently “in production” (go to Active Job List on page 175 for more information).
- **Matrix List** – lists all the matrices currently available in your Confermit database (go to Matrix List on page 176 for more information).
- **Scheduling** – lists the jobs that are awaiting execution and those that have been run (go to Scheduling on page 179 for more information).
- **Concurrent Sampling** – enables you to run several sampling jobs simultaneously so scarce panelist resources can be allocated fairly across the jobs (go to Concurrent Sampling on page 182 for more information).
- **Multiple Sample Upload** – enables you to upload several jobs simultaneously (go to Multiple Sample Upload on page 184 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 (go to Tester Template List on page 185 for more information).
- **Sampling Settings** – allows you to set default values and rules for the panel (go to Sampling Settings on page 186 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 Community Portals database.

Note: The design and creation of a Community 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 Community Portal database and those available when creating a questionnaire database. For further information on designing and creating a database, refer to the Confirmit Authoring User Manual.



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:
 - o **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 (go to Database Generation on page 17 for more information). Note that each “question” in the Panel Variables toolbox will become a column in the database.
 - o **The New Objects toolbox** – lists the objects you can use in the database. Drag and drop objects from here to the Panel Variables toolbox.
 - o **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.

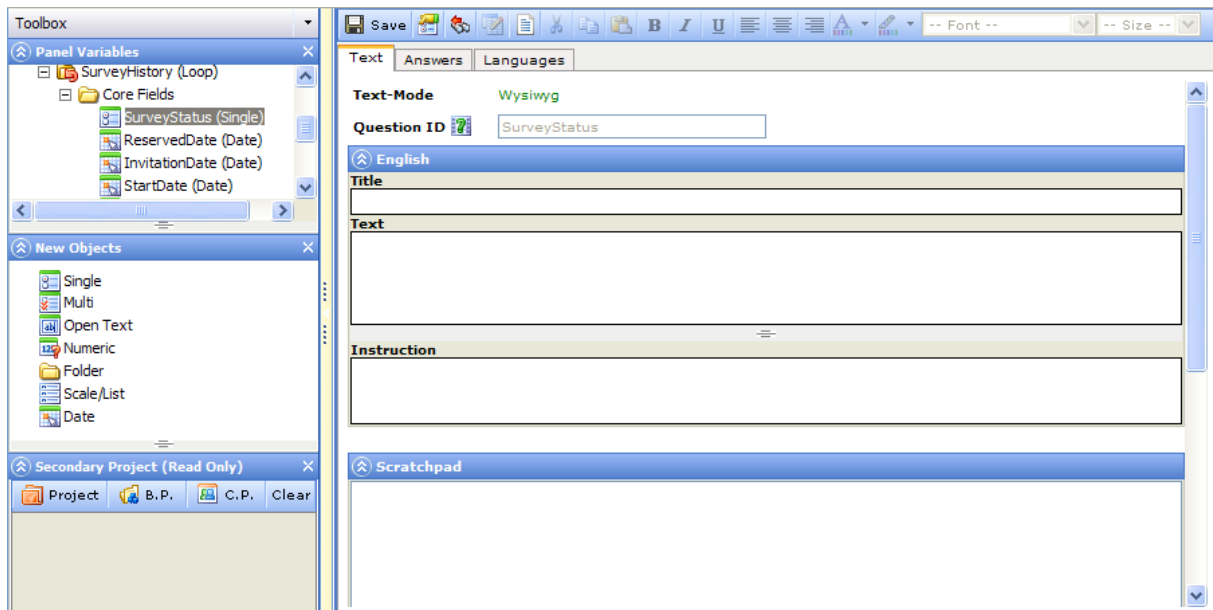


Figure 9 Example of the Professional Designer page

For further information, refer to the Confirmit Authoring User Manual.

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 "Scales and Lists" 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 Community Panel (go to How to Create a New Community Panel on page 3 for more information), the "standard" folders are created along with some basic variables.

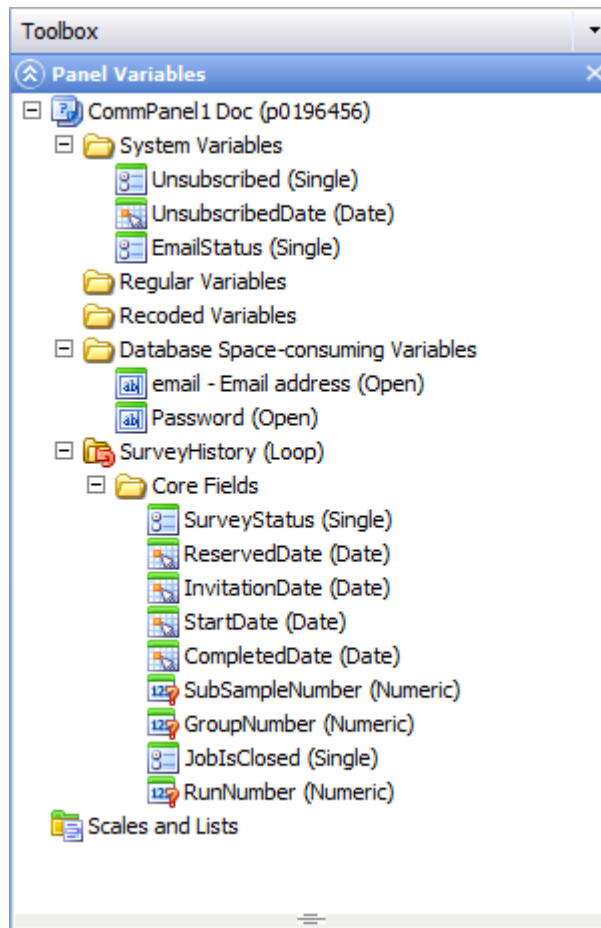


Figure 10 The Panel Variables toolbox as initially created

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 Confirmit 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 (go to Database Cleanup on page 63 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 Survey History > Core Fields

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

- **SurveyStatus** – indicates the current status of the panelist in the survey. The options are:
 - o **Reserved** – the panelist is selected for a job but the invitation email has not yet been sent (a short-term status).
 - o **Invitation Sent** – an invitation to participate in the survey has been sent to the panelist but the panelist has not yet accessed the survey.
 - o **In Progress** – the panelist has started the survey but has not yet completed it.
 - o **Completed** – the panelist has completed the job.
 - o **Stopped By System** – the panelist has been screened by the system.
- **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.
- **JobsClosed** – specifies whether or not the job is closed.

4.1.1.5. Unsubscribe

"Unsubscribe" variables are included in the System Variables folder when the Community Panel is created. When set up correctly, these 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 Conformit Flex 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 Conformit Support at support@conformit.com for further details.

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 Conformit Authoring toolbox.

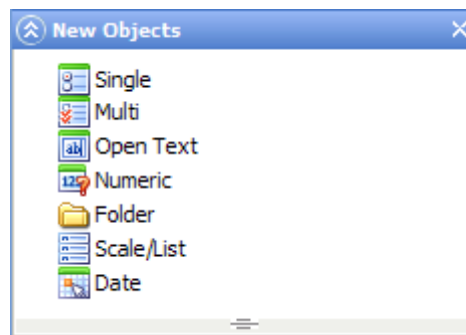


Figure 11 The objects available in the New Objects toolbox

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.

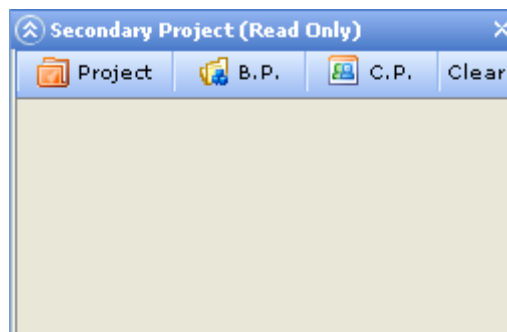


Figure 12 The Secondary Project toolbox

To find the panel you wish to add, open in this toolbox and click the **Project**, **B.P.** (Basic Panel) or **C.P.** (Community 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 pop-up window displaying all projects or panels is displayed.

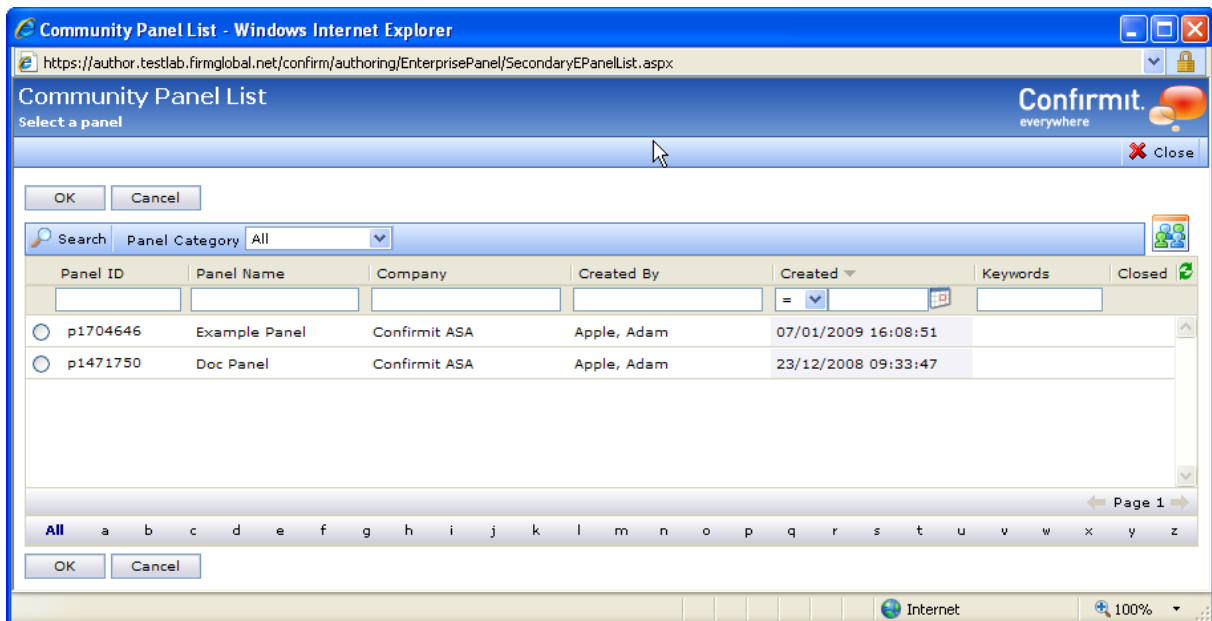


Figure 13 Example of the Project List pop-up

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.

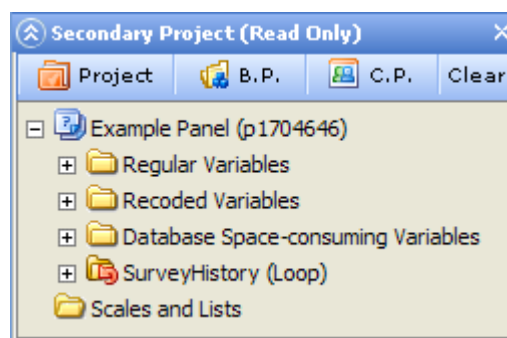


Figure 14 Example of the Secondary Project questionnaire tree

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.

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 Confirmit survey. Refer to the Confirmit Authoring User Manual 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 15 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. Confirmit 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:
 - o **Normal** - an ordinary question object.
 - o **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" (go to Calculate Variables on page 102 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 data 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. (go to Access Permission Levels on page 27 for more information). The options here are:
 - o **Low** – all users with normal access permission can edit the data in this column.
 - o **Medium** – only users with access levels Medium or High can edit the data in this column.

- o **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 precodes 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 (go to Characteristic on page 17 for more information). The options are:
 - o **Normal** – columns for which you expect the majority of operations will be reading of the data contained.
 - o **Recoded** – columns for which you expect the majority of operations will be writing of data.
 - o **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.
 - o **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.
- **Date** – defines the data from this open question (free text) as a date. The data in this column must then be in the specified format, and the system will expect it to be in that format so it will not need to analyze the data.
- **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 (go to How to Delete an Object from the Tree on page 13 for more information). Uncheck to undelete the question (go to How to Undelete an Object on page 13 for more information). Note that you can view deleted questions by right-clicking on the Community 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 Community 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** (go to Designer on page 10 for more information).

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

The page shown below is displayed.

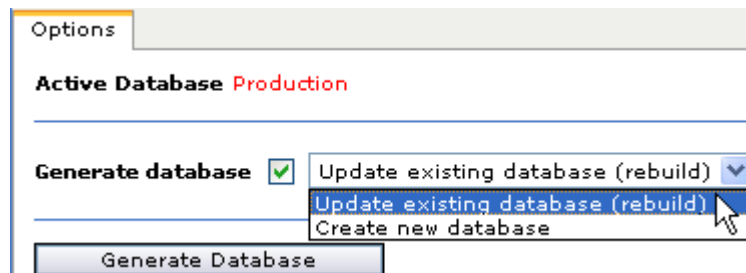


Figure 16 The Generate database Options tab

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 [Database Cleanup](#).

Note: Only the database is created; there is no web interview as in Confirmit Designer. Note also that in Community Panels there is no Test database available.

4.3. Community Panel Definition Export

You can export Community Panel definitions (the project coding) using XML. This enables you to transfer panel definitions from one Confirmit 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 (go to Sampling Settings on page 186 for more information) and the panel settings under the **Panel Management > Panel Settings** menu (go to The Panel Settings on page 105 for more information).

4.3.1. How to Export a Panel Definition

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

The Survey Definition Export dialog opens.

Figure 17 The Survey Definition Export dialog box

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 Community 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 Confirmit Authoring Home page, go to the **Home > Import Survey Definition** menu command.
The Survey Definition Import dialog opens.

Figure 18 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.

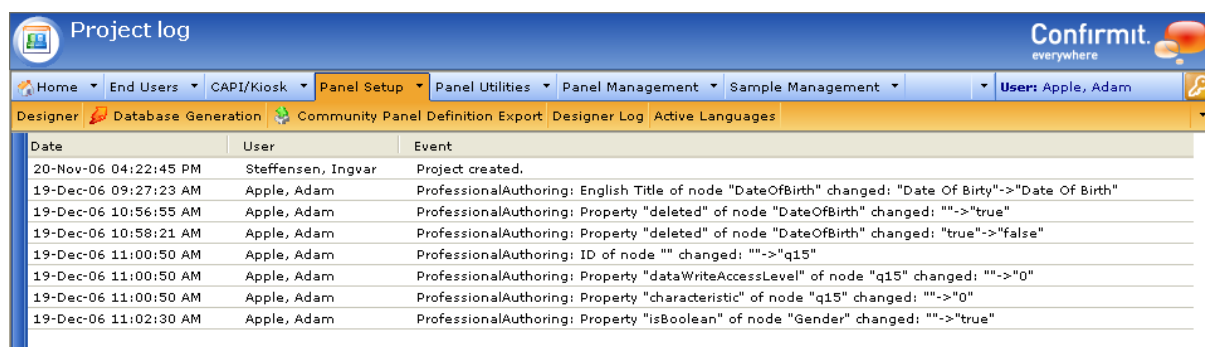
3. Click **OK** to close the Task pane.

The panel will now be listed on the Community Panel List, accessed by going to the **Home > Community 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.



Date	User	Event
20-Nov-06 04:22:45 PM	Steffensen, Ingvar	Project created.
19-Dec-06 09:27:23 AM	Apple, Adam	ProfessionalAuthoring: English Title of node "DateOfBirth" changed: "Date Of Birty"->"Date Of Birth"
19-Dec-06 10:56:55 AM	Apple, Adam	ProfessionalAuthoring: Property "deleted" of node "DateOfBirth" changed: ""->"true"
19-Dec-06 10:58:21 AM	Apple, Adam	ProfessionalAuthoring: Property "deleted" of node "DateOfBirth" changed: "true"->"false"
19-Dec-06 11:00:50 AM	Apple, Adam	ProfessionalAuthoring: ID of node "" changed: ""->"q15"
19-Dec-06 11:00:50 AM	Apple, Adam	ProfessionalAuthoring: Property "dataWriteAccessLevel" of node "q15" changed: ""->"0"
19-Dec-06 11:00:50 AM	Apple, Adam	ProfessionalAuthoring: Property "characteristic" of node "q15" changed: ""->"0"
19-Dec-06 11:02:30 AM	Apple, Adam	ProfessionalAuthoring: Property "isBoolean" of node "Gender" changed: ""->"true"

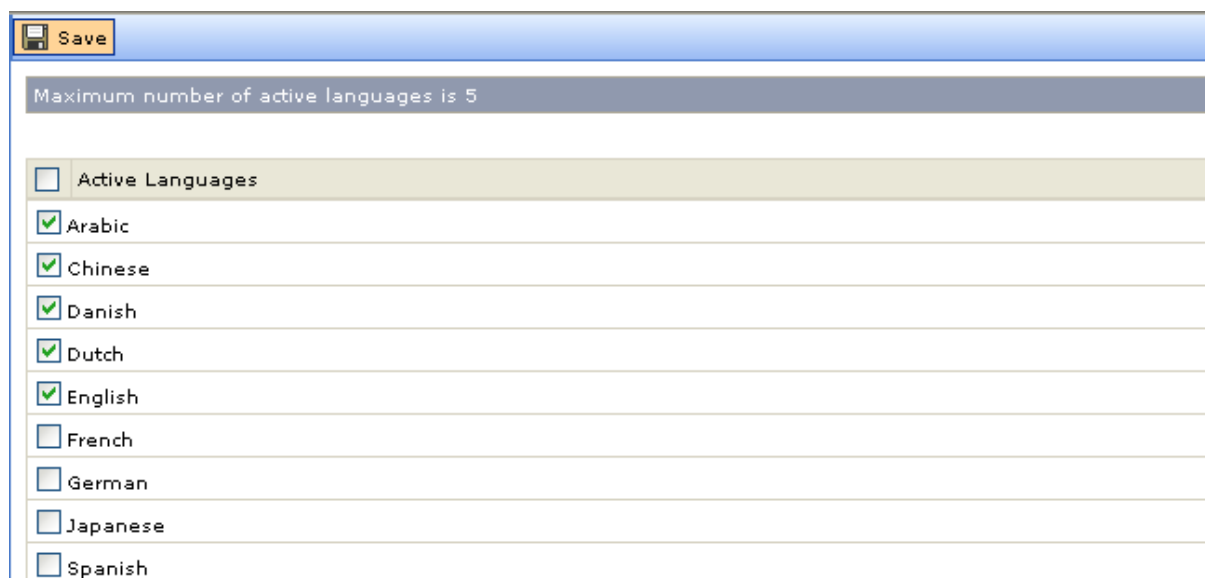
Figure 19 Example of the Designer Log page

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 (go to The General Tab on page 22 for more information).

In the General tab you can select as many languages as required for the Portal, but while you are working in Community 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 Confirmit; 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.



Save

Maximum number of active languages is 5

☐ Active Languages
☒ Arabic
☒ Chinese
☒ Danish
☒ Dutch
☒ English
☐ French
☐ German
☐ Japanese
☐ Spanish

Figure 20 Example of the Active Languages pane

The functionality on this tab is also available via the **Panel Utilities > Overview > Active Languages** tab (go to The Active Languages Tab on page 27 for more information).

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 Confirmit Community Panel clients who have previously used a different panel-management product, and allows you to import legacy jobs into the Confirmit 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 Confermit panel.

Contact Confermit 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 Community Portals database.



Figure 21 The Panel Utilities menu

5.1. Overview

When you access a panel via its link in the Community 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.

The screenshot displays the 'General' tab of the Confirmit Panel Overview. The interface includes a top navigation bar with 'Save', 'Duplicate', and 'Delete' buttons. Below this, the 'General' tab is selected, showing fields for 'Panel ID' (p6703291), 'Panel Name' (Copy of Confirmit Horizons 15 Demo), 'Company' (Confirmit), and a 'Description' text area. The 'Languages' section shows 'Available' languages (Afrikaans, Albanian, Arabic, Arabic (Algeria), Arabic (Bahrain)) and 'Selected' languages (English, Norwegian). The 'Categories and Keywords' section shows 'Available Categories' (Template, Benchmark, Library) and 'Selected' keywords (demo). A 'New Keyword' field with an 'Add' button is also present. The 'Creator' is listed as 'Apple, Adam', and the 'Created' date is '05/03/2010 11:20:12'. The 'Last Modified' date is '05/03/2010 11:31:10', and the 'Status' is 'production'. The 'Deployment' is 'WI (public)'. There is a checkbox for 'Enforce HTTPS in Advanced Reporting'. An 'Email address to receive emails triggered by scripting errors in interview' field contains 'documentation@confirmit.com'. A 'Snapshot Panel' field with a 'Select Snapshot Panel' button is at the bottom. The right-hand sidebar contains three sections: 'Project Titles' with 'English' (Confirmit Community Panel) and 'Norwegian'; 'Project Info Fields' with 'Start date' (10/11/2007) and 'End date' (01/12/2010); and 'Administrator Info' with a table of statistics and a 'Refresh' button.

Administrator Info	
Complete responses	-
Incomplete responses	-
DB server name	vm254
Size of DB data	-
Size of DB log	-
Questionnaire last modified	-
WI last generated	-
DB last generated	-
Last response	-
Reporting last accessed	-
Project info last updated	-

Figure 22 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 Confirmit 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 tab (go to The Active Languages Tab on page 27 for more information).
- **Categories and Keywords** – the keywords registered for the project as listed in the Keywords column on the Community Panels List page (go to How to Access Community 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 Confirmit 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.
- **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).
- **Snapshot Panel** - if you have created a snapshot database to take snapshots of this panel (go to The Snapshot Panel on page 195 for more information), select the snapshot panel here so that the data can be copied.
- **Project Tasks button** – opens the Tasks management page (go to The Project Tasks Page on page 24 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 (go to How to Set Up Recurring Tasks on page 138 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. Confirmit users who have Administrator permission to a project will be able to see and search for all batch tasks that have been set up for this 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 (go to How to Change the Execution Settings on page 143 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.

Task Id	User Id	Project Id	Task Type	Schedule	Status	Company	Server	Comment
32116	nigelb	p6703291	Launch Survey	05/03/2010 11:23:49	Aborted by System	Confirmit	VM246	Launch Survey
32115	nigelb	p6703291	Launch Survey	05/03/2010 11:21:05	Complete	Confirmit	VM246	Launch Survey

Figure 23 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 (go to How to Set Up Recurring Tasks on page 138 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 24 Example of a Task Details window

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

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

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

5.1.2. The Permissions Tab

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

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

Initially, only users and groups within your organization are listed on the page. Add other users by supplying Confirmit with the users' correct user keys.

User ID	Last Name	First Name	-	R	W	D	Administrate project	Data edit access medium	Data edit access high
[Search]									
Users in Confirmit									
cadavido	Apple	Adam		☒	☐	☐	☐	☐	☐
davido_pros	Apple	Adam		☒	☐	☐	☐	☐	☐
nigelb	Apple	Adam		☐	☐	☒	☒	☐	☐
nigelb_admin	AppleAdmin	Adam		☒	☐	☐	☐	☐	☐
nigelb_pros	Apple	Adam		☒	☐	☐	☐	☐	☐
Groups									
Other users									
[Add other users] [Remove other users]									

Figure 25 Example of the Permissions tab

5.1.2.1. How to Add Users to the Permissions Tab

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

1. Click the **Add other users** button below the list.
The Enter keys of new users dialog opens.
2. Paste the new user's key into the field and click **Add**.

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

Enter keys of new users

Add

Figure 26 User Key Entry Window

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

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

5.1.2.2. How to Remove Users from the Permissions Tab

To remove a user from the Other Users list:

1. Click the **Remove other users** button below the list.

A dialog opens listing the users in the Other Users list.



Figure 27 The Remove Users dialog

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

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.

5.1.2.3. Access Permission Levels

The panelist data is held in columns in the database; one column for each “question” (go to Designer on page 10 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 (go to Question Properties on page 15 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 checkboxes 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 checkbox 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 checkboxes are selected. The user can read or change all the data columns.

5.1.3. The Active Languages Tab

This tab lists all the project languages in a multilingual project, that have been selected on the General tab (go to The General Tab on page 22 for more information). To reduce the volume of information that must be presented on your display, you can work with up to five languages at one time. Select and deselect the languages you wish to work with by checking/unchecking the relevant check-box. Note that the maximum of five languages only refers to what you see whilst working in Confirmit; the panelists will see their selected language.

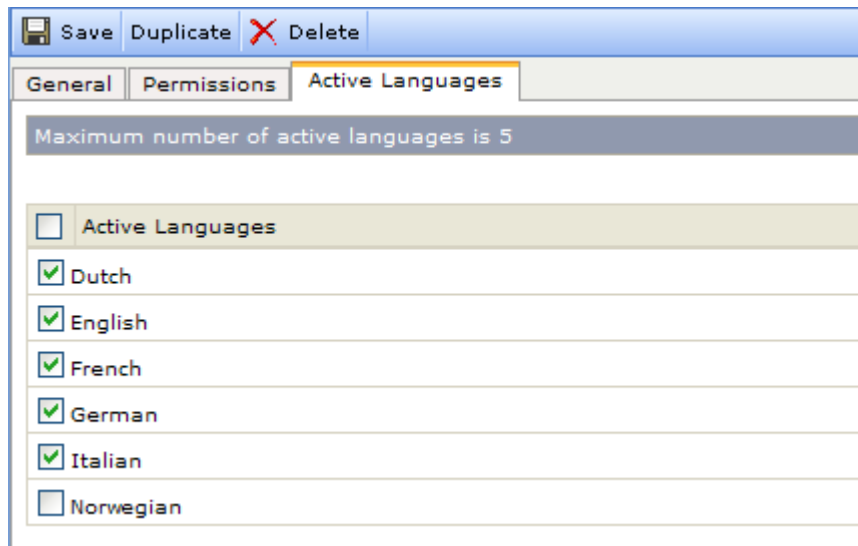


Figure 28 The Active Languages tab

The functionality on this tab is also available via the **Panel Setup > Active Languages** menu command (go to Active Languages on page 20 for more information).

5.2. Linked Projects

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

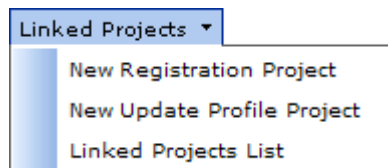


Figure 29 The Linked Projects drop-down list

The options are:

- **New Registration Project** - click to create a new project for panelists' initial registration to the Community 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 projects.
- **New Update Profile Project** - click to create a new project 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 projects.
- **Linked Project List** - opens a list of those projects that have been linked to the panel. The list shows registration projects, profile update projects, polls and projects that have been sampled to. Note that keywords are available for registration and update projects, and can be used for filtering. This list can be filtered on the different categories: Sample projects (regular surveys that you have uploaded sample to from the Community Panel), Registration projects and Profile Update projects (the categories mentioned above) and Polls. Click on the project name to open the project.

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

Search Reset All		New Registration Project New Update Profile Project	
Project ID	Project Name	Created By	Created
p6704907	Profile Update Doc1	Apple, Adam	05/03/2010 11:53:53
p6704846	Registration survey Doc1	Apple, Adam	05/03/2010 11:52:57

Figure 30 Example of the Linked Projects list

Two buttons corresponding to the **New ... Project** menu items are available in the upper-right corner of the list, to enable you to create new registration and update projects. This greatly simplifies setting up these types of surveys from the panel, since the functionality will automatically set the correct category and link the project 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 project that is linked to a Community Panel, the Community Panel will automatically open in the Secondary Project toolbox. From here you can drag-and-drop variables from the Community Panel into the survey. The variables dragged in will automatically be set as Visible panel variables. Also, if you have the Community 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.

Note that projects linked to a panel will have a link on the Project Overview page, enabling you to go directly to that panel from the project.

project

Community Panel ☐ Allow current survey to access [Go to panel](#)

Enforce HTTPS in Advanced Reporting ☐

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

5.2.1. 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 Community Panel (through the "Community 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 Community 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 Community panel, the Community Panel will automatically open in the Secondary Project toolbox and you can drag-and-drop variables from the Community Panel to the survey. The variables dragged into the survey will automatically be set as Visible panel variables.

5.3. Community Portals

In Confirmit you can build your own library of panelist interfaces (Community 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 Community Portal to answer new or previously-started surveys, view their survey list, update their profile, view their points, etc. All these actions are conducted via the **Community 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 (community), you can then recruit relevant respondents to specific surveys. A Community Portal is the interface (homepage) through which your panelists log in to participate in surveys, check their point status, change their profile, etc.

Community Portals can only be used together with Confirmit Panels.

5.3.1. Accessing Community Portals

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

The Community 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 Community 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**.

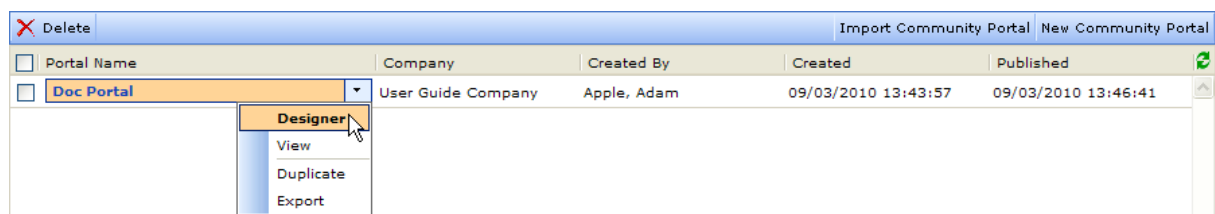


Figure 32 Accessing a Community Portal for editing

The menu options are:

- **Designer** – opens the Community 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.
- **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 Community Portal to another Confirmit server.

5.3.2. How to Add a Community Portal to your Panel

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

- **Create** a new Community Portal (go to How to Create a New Community Portal for a Panel on page 30 for more information).
- **Import** an existing Community Portal template to your panel (this is the most common approach)(go to How to Import a Community Portal on page 31 for more information).

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

5.3.2.1. How to Create a New Community Portal for a Panel

1. Go to the **Panel Utilities > Community Portal List** menu command.

The Community Portal List page opens.

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

The Properties dialog box opens.

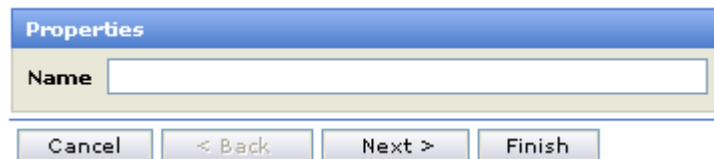


Figure 33 The Community Portals Properties dialog box

- Type a name for the new Community Portal into the Name field and click **Next**.

The Select Template page opens, listing the templates available. Note that if you choose **Finish** here, then an empty Portal Designer page opens and you must then create the portal "manually".

- Select the desired template from the list and click **Finish**.

The Community 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.

5.3.2.2. How to Import a Community Portal

You can also import Community Portals created on other Confirmit installations (go to How to Export a Community Portal on page 58 for more information).

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

- Go to the **Panel Utilities > Community Portal List** menu command.

The Community Portal List page opens.

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

The File to Upload selection dialog box opens.

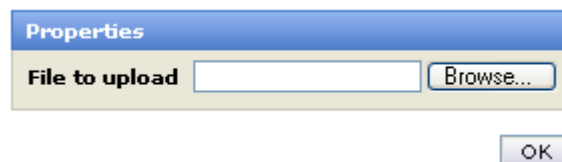


Figure 34 The File to Upload selection dialog box

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

The portal is imported to this Panel.

5.3.2.3. 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:

- Go to the **Panel Utilities > Community Portals** menu command, and from the Community Portal List select the portal you wish to make default.
- In the Community Portal toolbox, right-click on the portal and select **Set as Default Portal**.

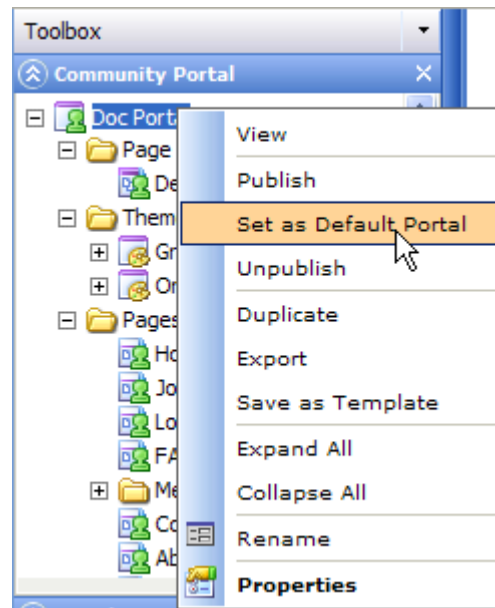


Figure 35 Setting a portal as Default

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

5.3.2.4. 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 > Community Portals** menu command to open the Community Portals List window, and select the default portal.
3. In the Community 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**).

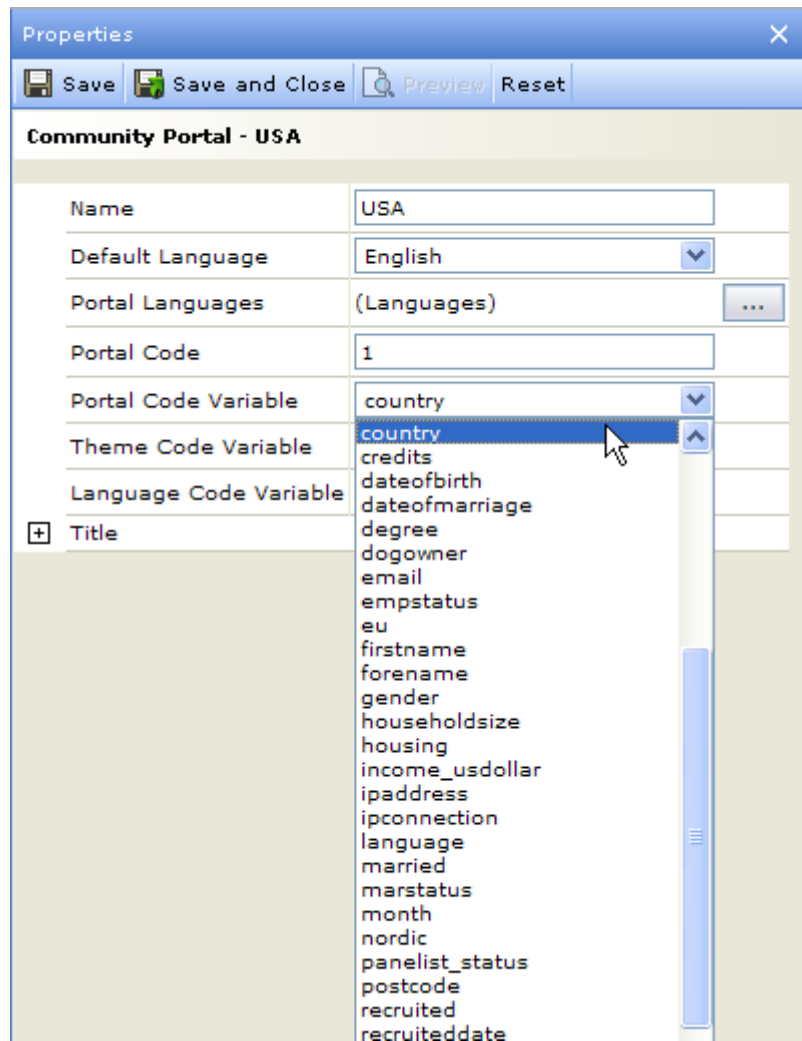


Figure 36 Setting the Portal Code Variable property

5. Set the Portal Code property to the precode 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 precode of the appropriate answer. I.e. If a particular portal is to be presented when the panelist's country is France, then set the precode 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.

5.3.3. Community Portal Languages

The Community 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.

5.3.3.1. How to Add a Language to the Portal

1. In the Community 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.

Community Portal - Documentation Portal 1	
Name	Documentation Portal 1
Default Language	English
Portal Languages	(Languages) ...
Theme Code Variable	
[-] Title	
English	
French	
German	

Figure 37 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.

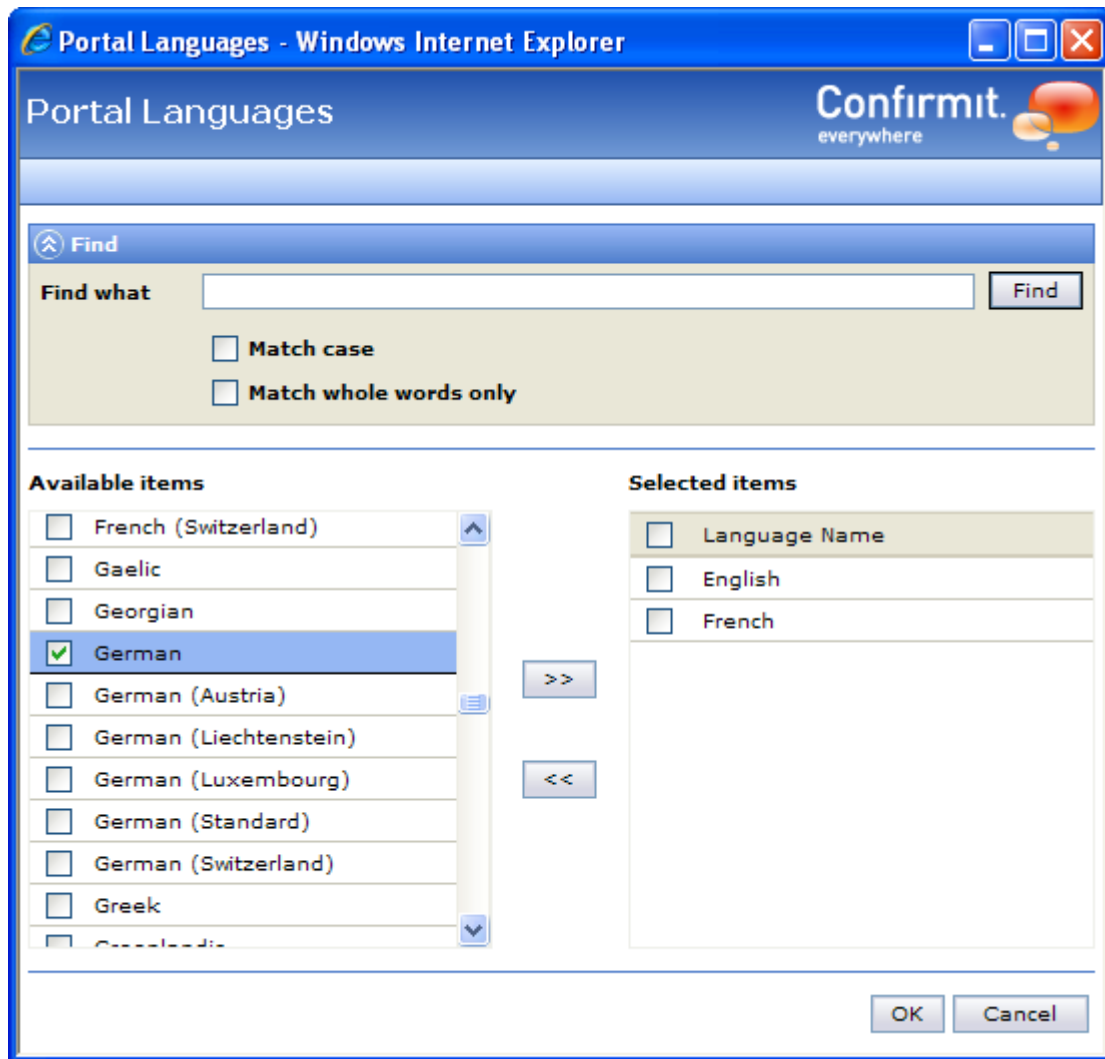


Figure 38 The Portal Languages window

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 (go to Page Properties on page 46 for more information).

5.3.3.2. 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. Create a language variable in the panel using the language codes (refer to Appendix B of the Authoring User Guide for details) as the precodes of 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?"

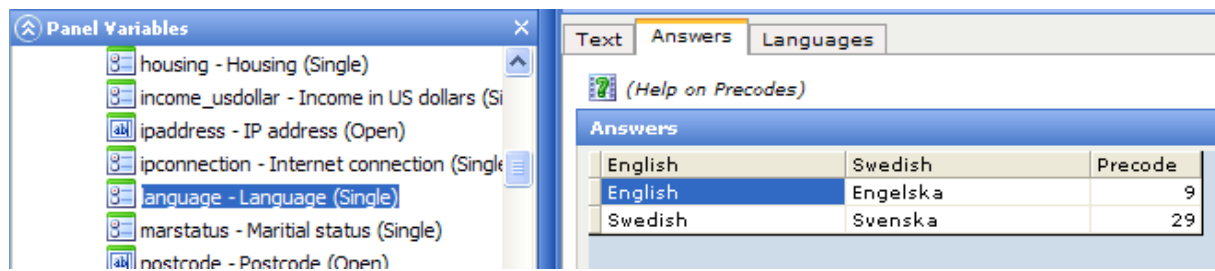


Figure 39 Example of the language variable

2. Go to the **Panel Utilities > Community Portals** menu command to open the Community Portals List window, and select the portal you wish to work with.
3. In the Community 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.

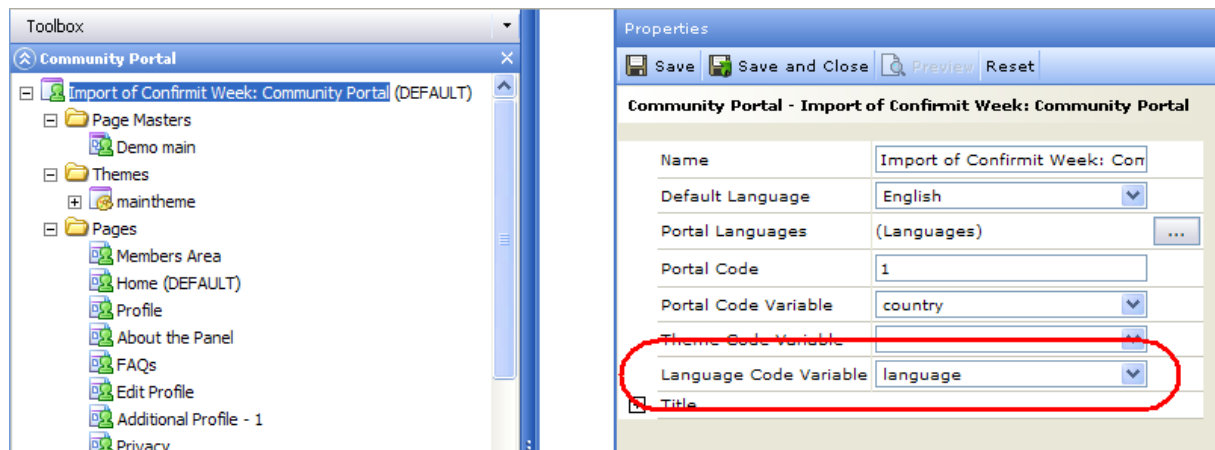


Figure 40 Setting the Language Code Variable property

5. Save the changes.
- Once the panelist has completed the panel questionnaire and provided an answer to the language variable, when the panelist 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.

5.3.4. The Community Portal Designer

The Community Portal Designer is where you create and make changes to your portal pages. The toolbox contains the Page Masters (go to The Page Masters Folder on page 37 for more information), Themes (go to The Themes Folder on page 38 for more information), and Pages (go to The Pages Folder on page 44 for more information). The Visual Components toolbox contains the elements that you can use on a page (go to Visual Components on page 48 for more information).

In the figure below, the Community Portal toolbox contains a Page Master, a Theme and four Pages. In addition there are four pages inside the Members Only folder (go to Folders and Structure on page 47 for more information).

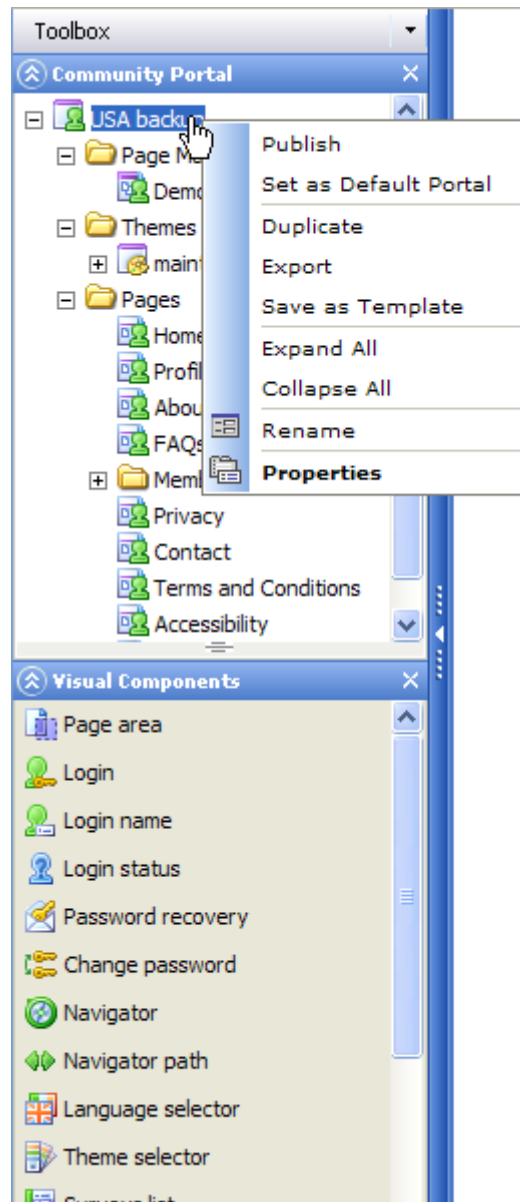


Figure 41 The Portal Designer toolboxes

The Community Portal has a right-click menu. The options in this menu allow you to publish the portal (go to [How to Publish a Community Portal](#) on page 57 for more information), set the portal as default (go to [How to Set a Portal as Default](#) on page 31 for more information), export the portal etc.

5.3.4.1. The Page Masters Folder

A Page Master is a template that provides an overall look-and-feel to the pages in the Community 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.

5.3.4.1.1. 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**.

5.3.4.1.2. 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.

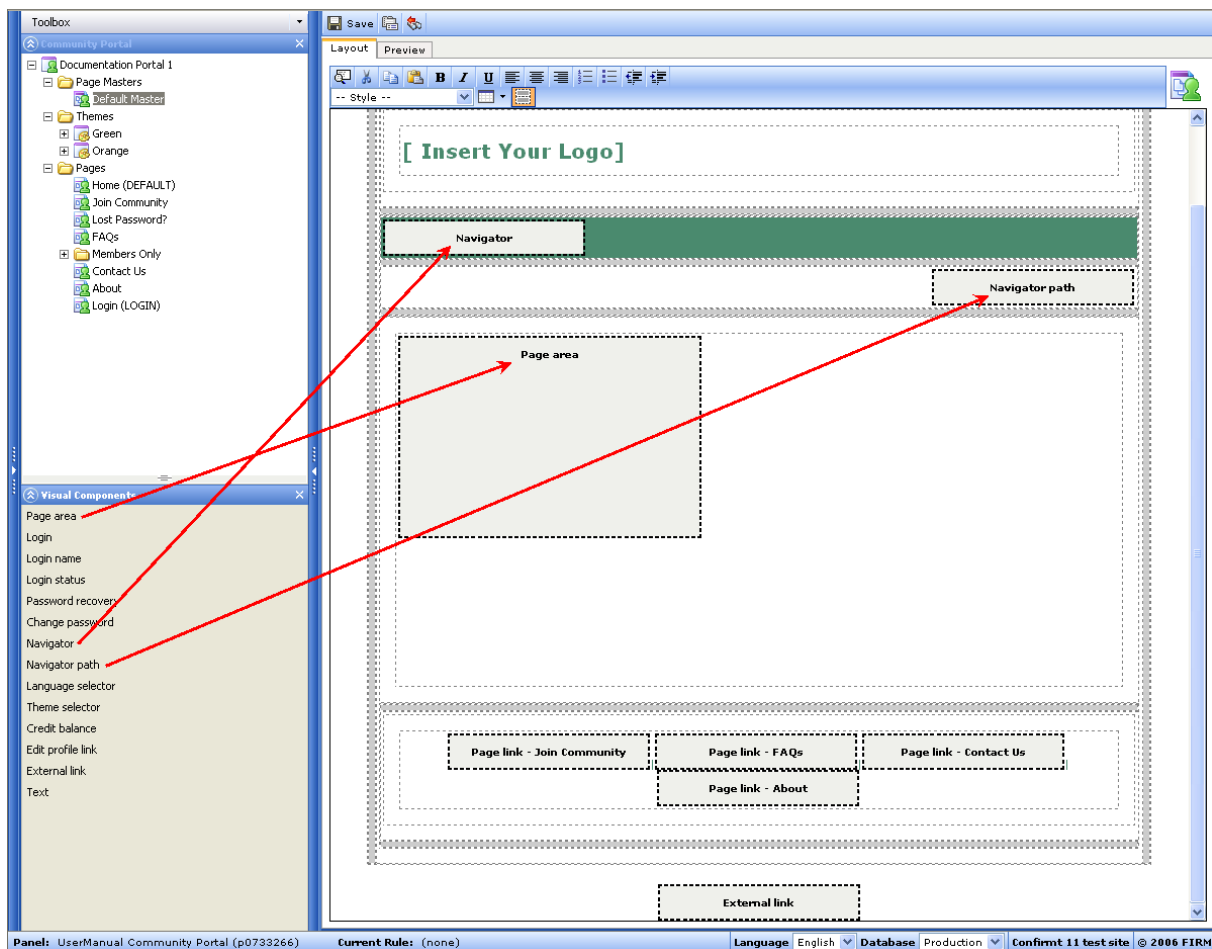


Figure 42 Example of a Page Master

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** (go to Visual Components on page 48 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](#).

5.3.4.2. The Themes Folder

A theme is a collection of different Styles, each holding a specific layout definition. Inside a Community 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 theme and select **Set as Default**. Confirmit will display the text "DEFAULT" next to the default theme in the Community Portal toolbox.

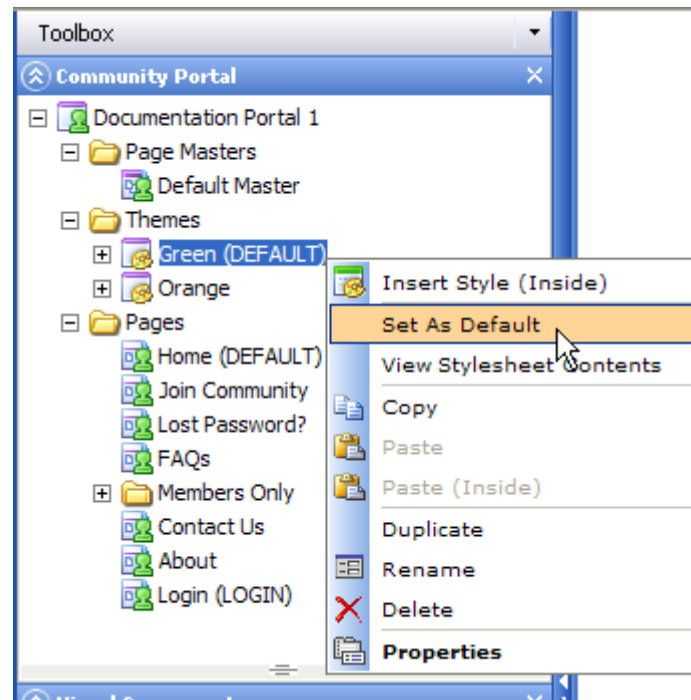


Figure 43 The default theme

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 (go to Visual Components on page 48 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 Confirmit select the theme to be used depending on a panelist's answer to a question in the panelist questionnaire. For example you could have Confirmit 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 (go to The Theme Code Property on page 39 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 (go to Adding a Theme Code to the Email Link on page 42 for more information).

5.3.4.2.1. The Theme Code Property

You can program Confirmit 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 Community Panels 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 precodes 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 precodes to "g" and "o" respectively as in the figure below.

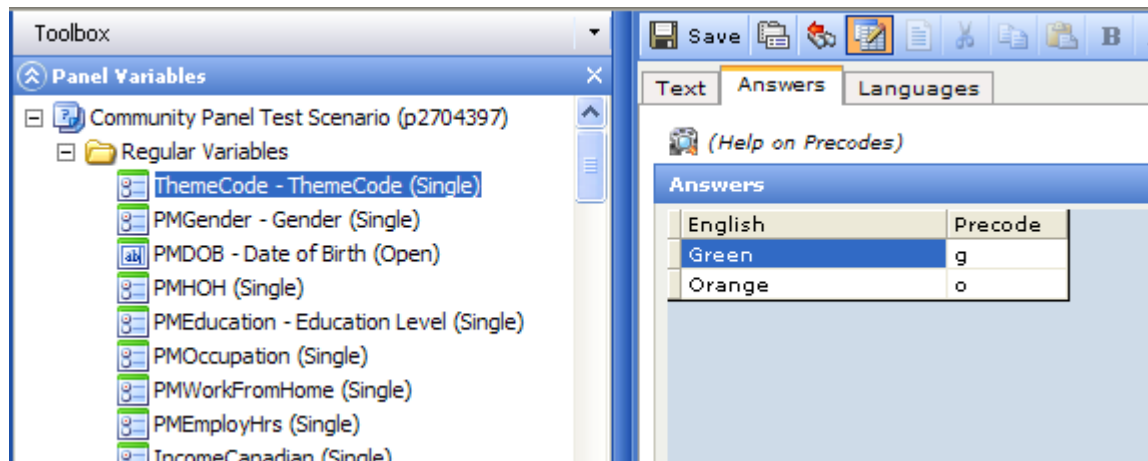


Figure 44 Example of a Single question in the panelist questionnaire to set the theme for a panelist

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 > Community Portals** page, select the portal you wish to work with.
6. In the Community 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, as shown in the example below.

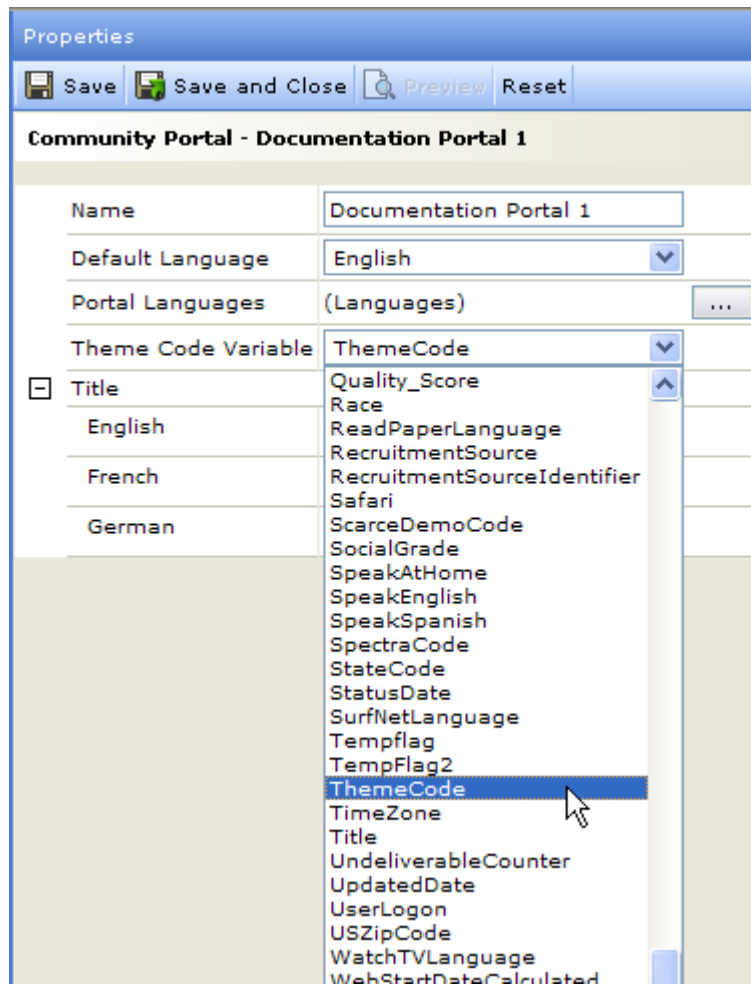


Figure 45 Selecting the Theme Code Variable property for the portal

8. Save the changes.
9. In the Community 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.

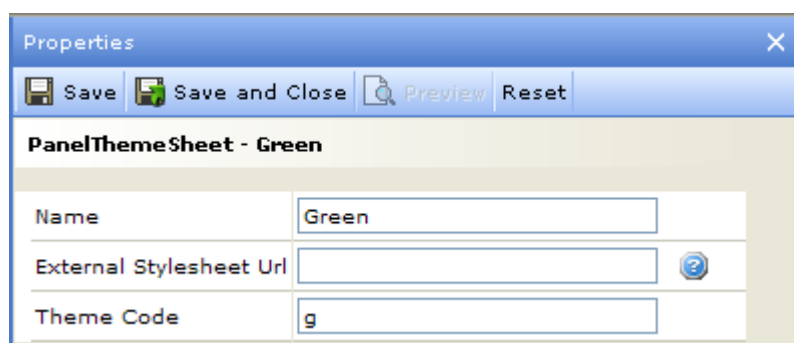


Figure 46 The Properties page for the Green theme

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

5.3.4.2.2. Adding a Theme Code to the Email Link

Once you have set up the Theme Code functionality (go to The Theme Code Property on page 39 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.

5.3.4.3. 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.

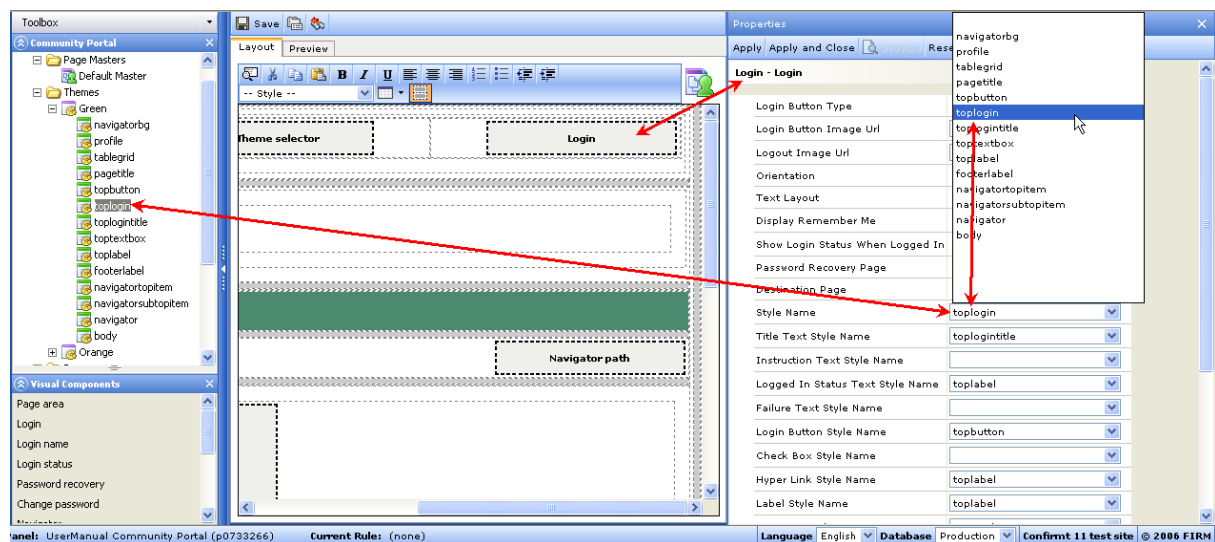


Figure 47 Applying a style for a Visual Component

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.

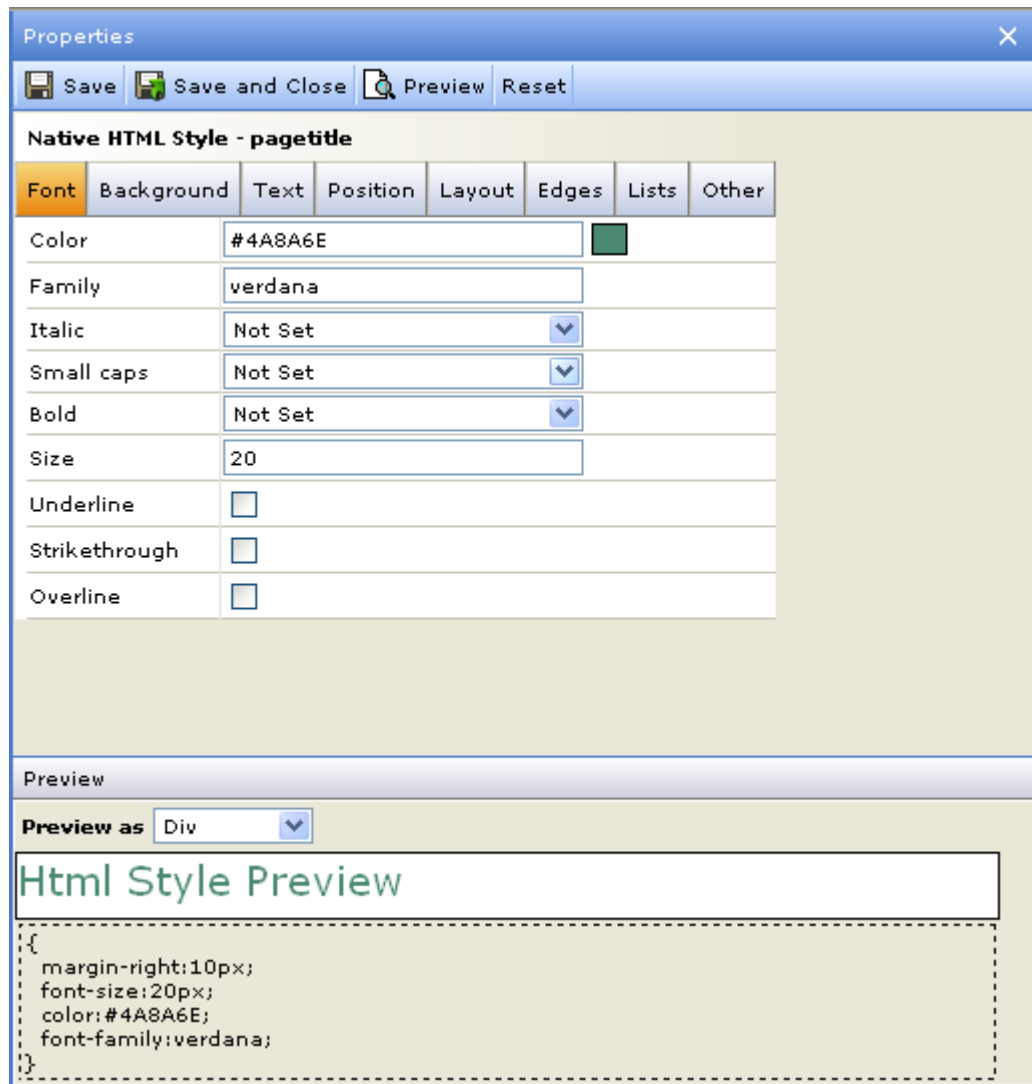


Figure 48 Style properties

When you change a setting, Confirmit 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 (go to Visual Components on page 48 for more information).

5.3.4.4. 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**.

Confirmit 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.

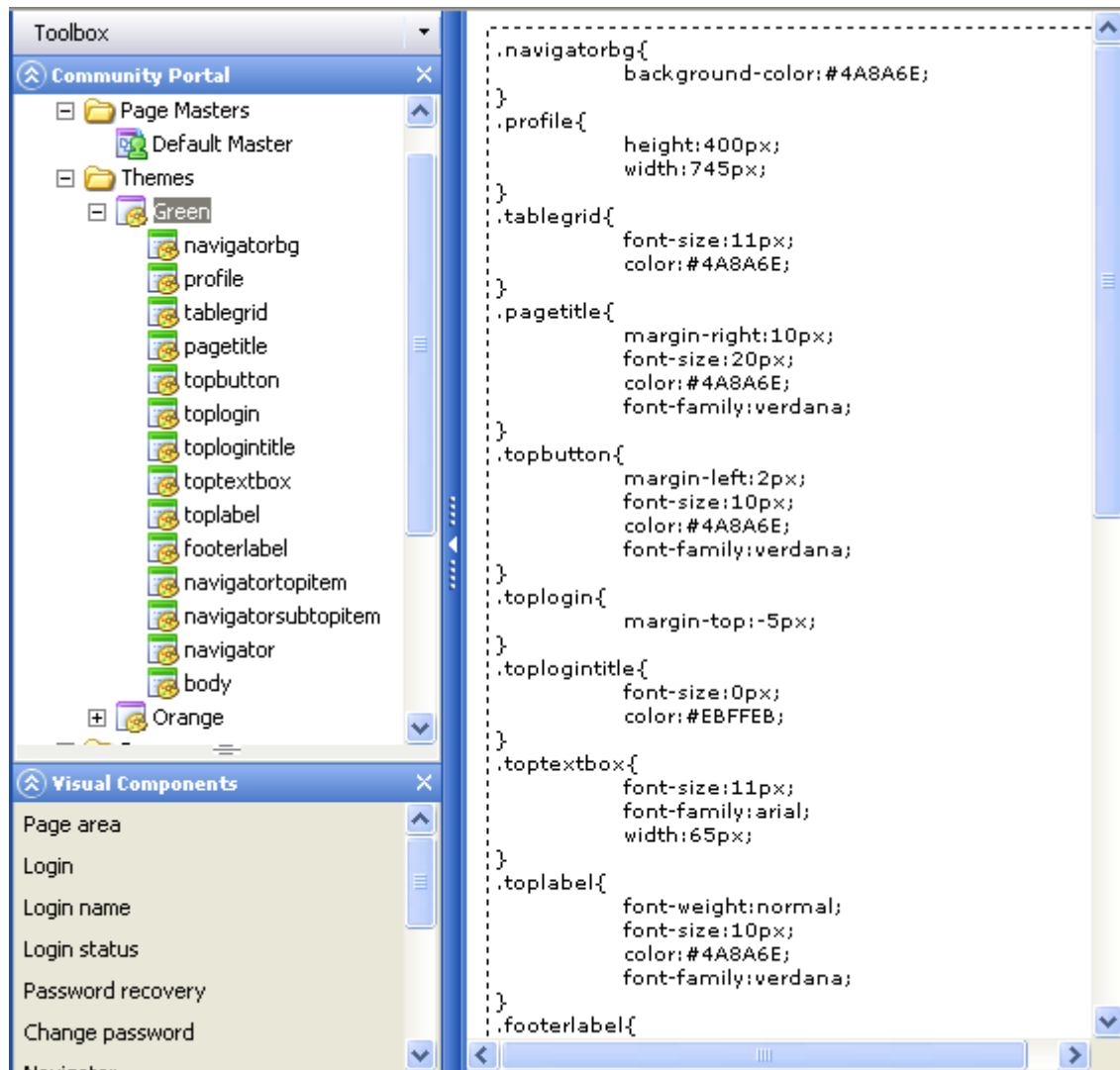


Figure 49 Viewing the Stylesheet Contents

5.3.4.5. The Pages Folder

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

5.3.4.5.1. How to Create a New Page

To create a new page in the Portal:

1. In the Community 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**.

5.3.4.5.2. How to Edit a Page

Double-click on a page in the **Community Portal Pages** folder to open the page for editing. The Community 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 (go to How to Create a New Page on page 44 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 (go to The Page Masters Folder on page 37 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) (go to How to Create a Page Master on page 37 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 Community Portal. In most cases this will be the starting page (home page).

Right-click the page and choosing **Set as Default**. Confirmit 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**. Confirmit will display the text "LOGIN" next to the login page in the Community Portal toolbox.

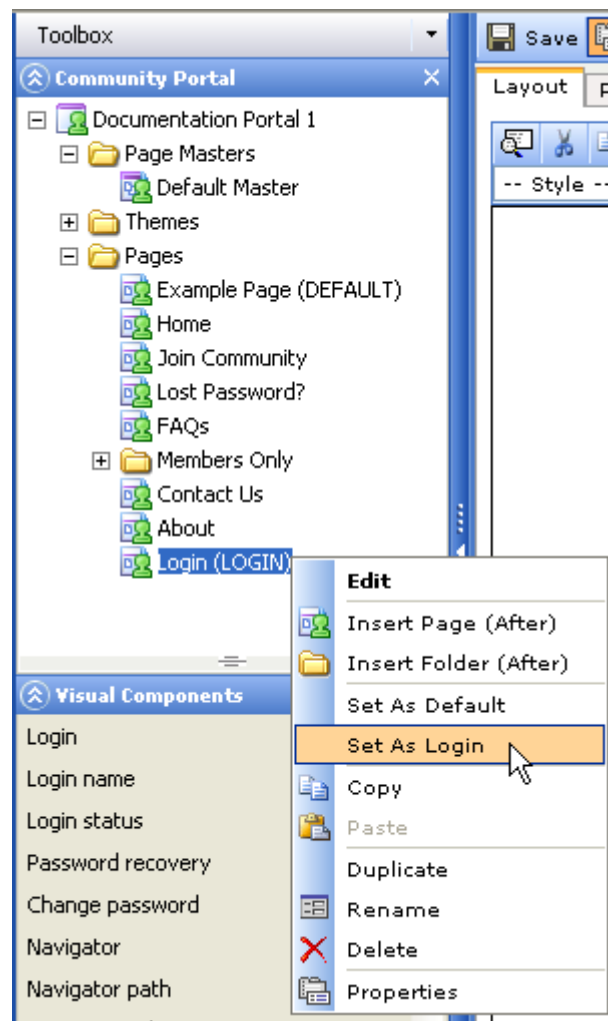


Figure 50 Setting the Login page

5.3.4.5.3. Page Properties

To open the Properties pane for a portal page, right-click on the page in the Community Panel 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.

Properties	
Page - Example Page	
Page Master	Default Master v
Name	Example Page
Protected	☐
☐ Navigator Item	
Visible	☒
Visible When Not Logged In	☒
☐ Title	
English	
French	
German	
☐ Description	
English	
French	
German	

Figure 51 Example of a Page Properties page

The page properties are as follows:

- **Page Master** – defines the layout for that page (go to The Page Masters Folder on page 37 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 (go to Folders and Structure on page 47 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 (go to Community Portal Languages on page 33 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).

5.3.4.5.4. 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 submenu 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.

- 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.

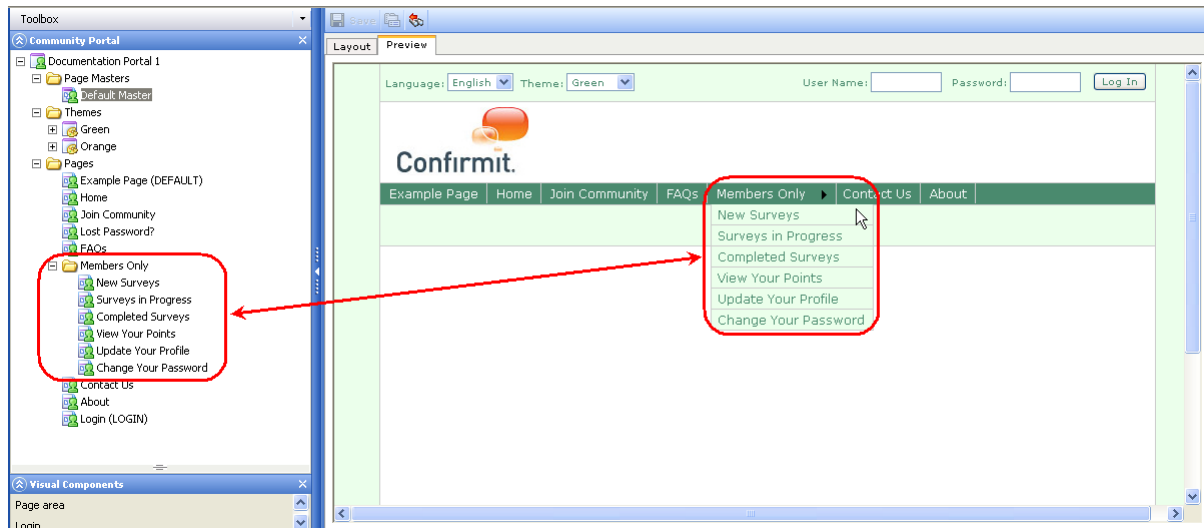


Figure 52 Using a folder to create a menu layout

5.3.4.6. 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.

5.3.4.6.1. 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.

- Double-click on the appropriate page in the Community Portal toolbox Pages folder, or create a new page (go to How to Create a Page Master on page 37 for more information).

The Page Editor for the page opens.

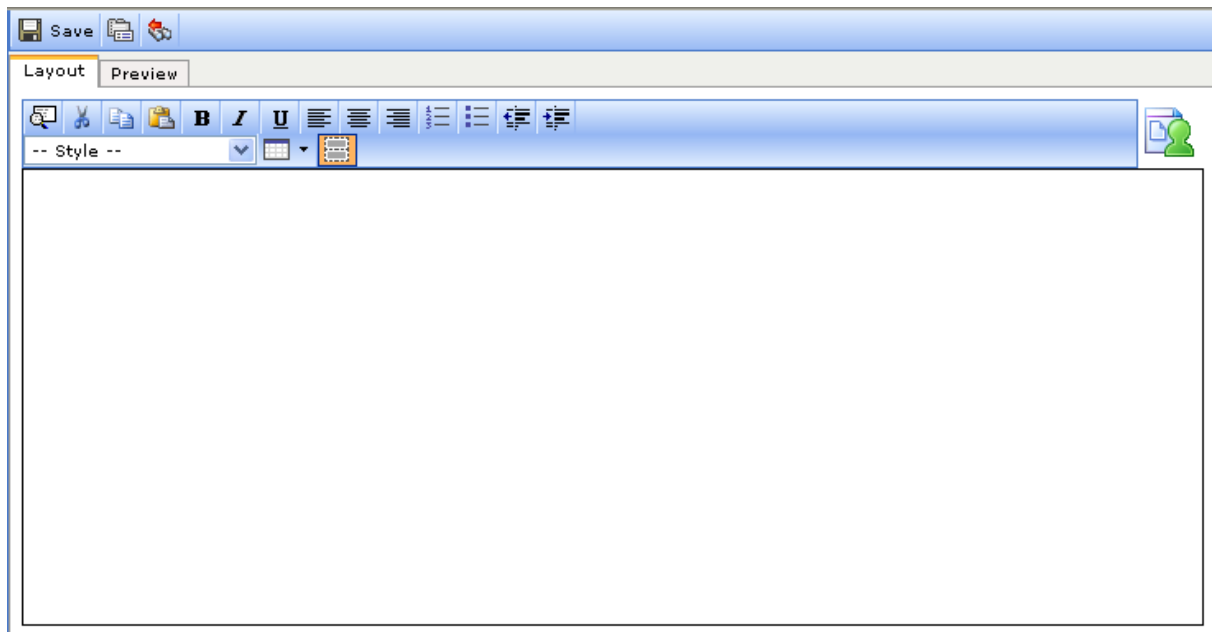


Figure 53 The blank page editor

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.

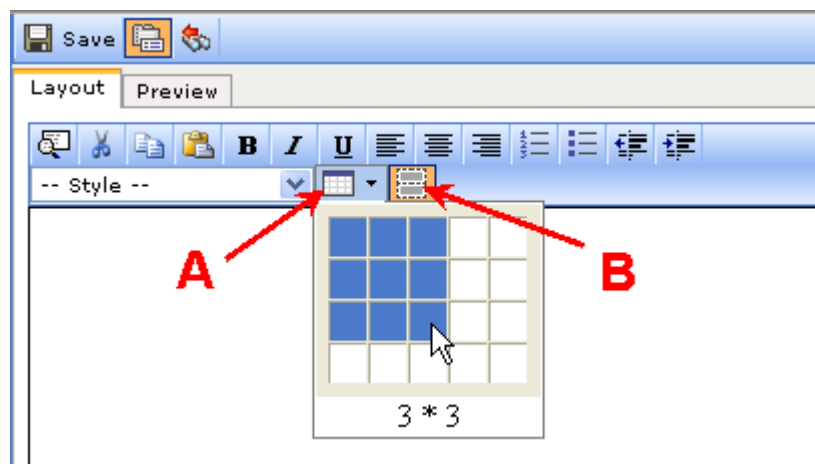


Figure 54 Creating a 3x3 HTML Table

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.

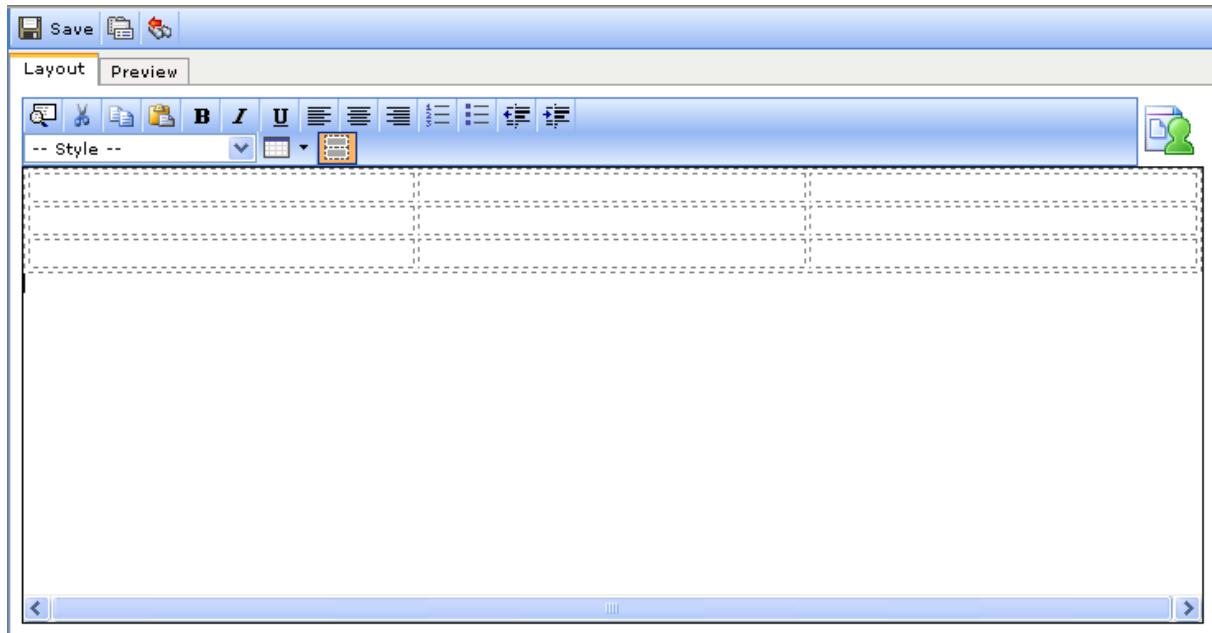


Figure 55 The resulting 3x3 table

5.3.4.6.2. 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.

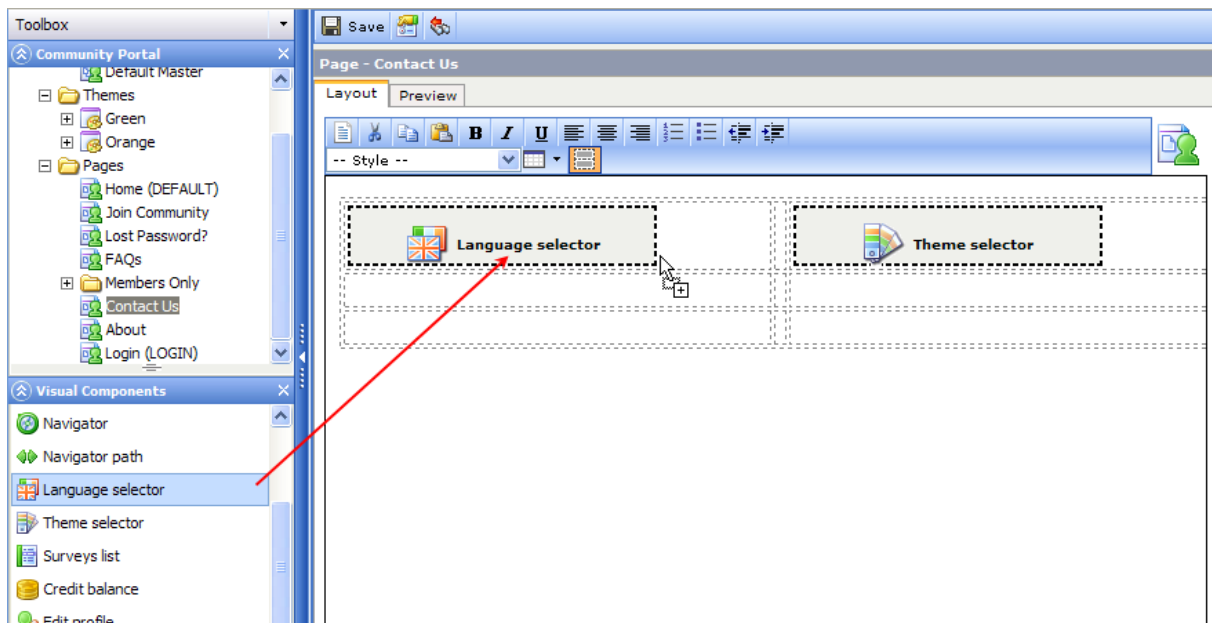


Figure 56 Dragging a Visual Component into the table

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.

5.3.4.7. 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 Confirmit Authoring User Manual for further information on the properties.

5.3.4.7.1. 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.

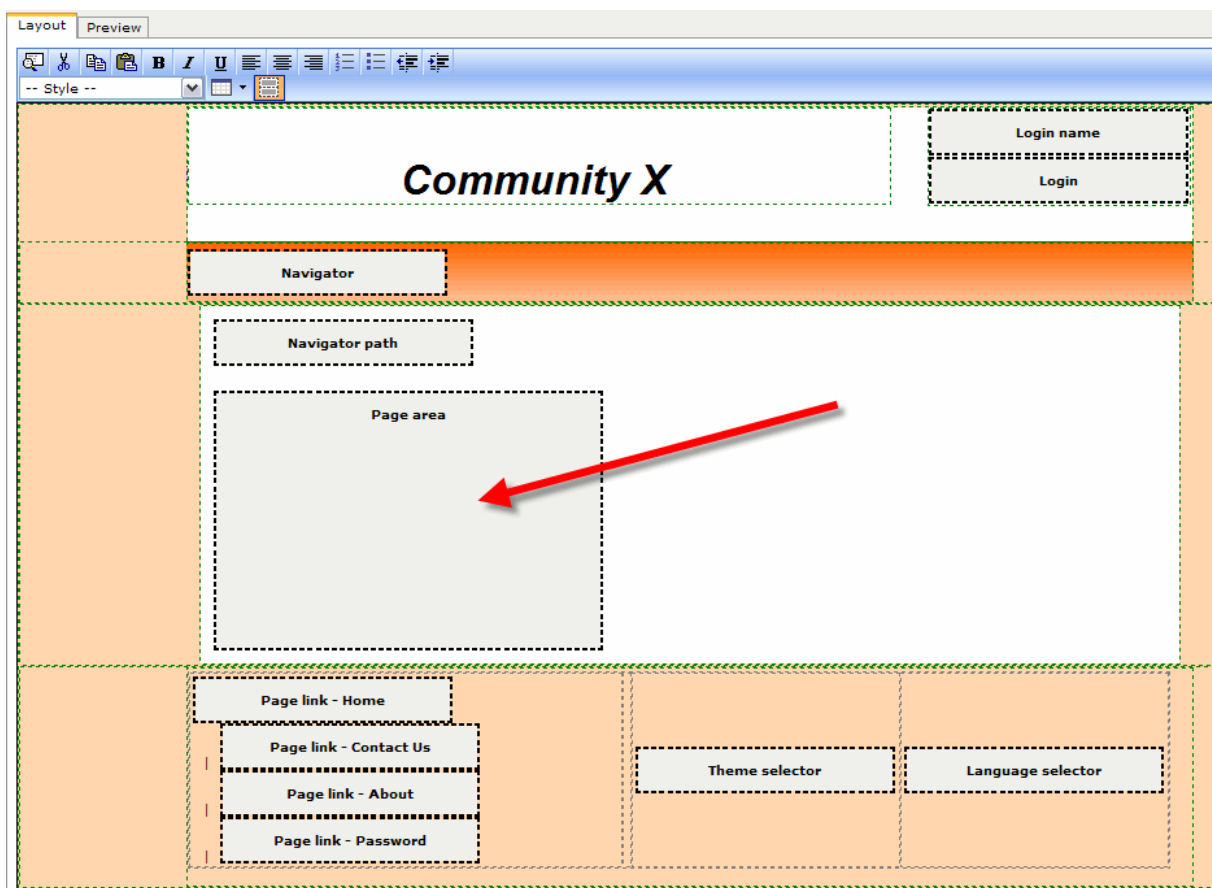


Figure 57 A Page Master with the Page Area element

5.3.4.7.2. Login

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

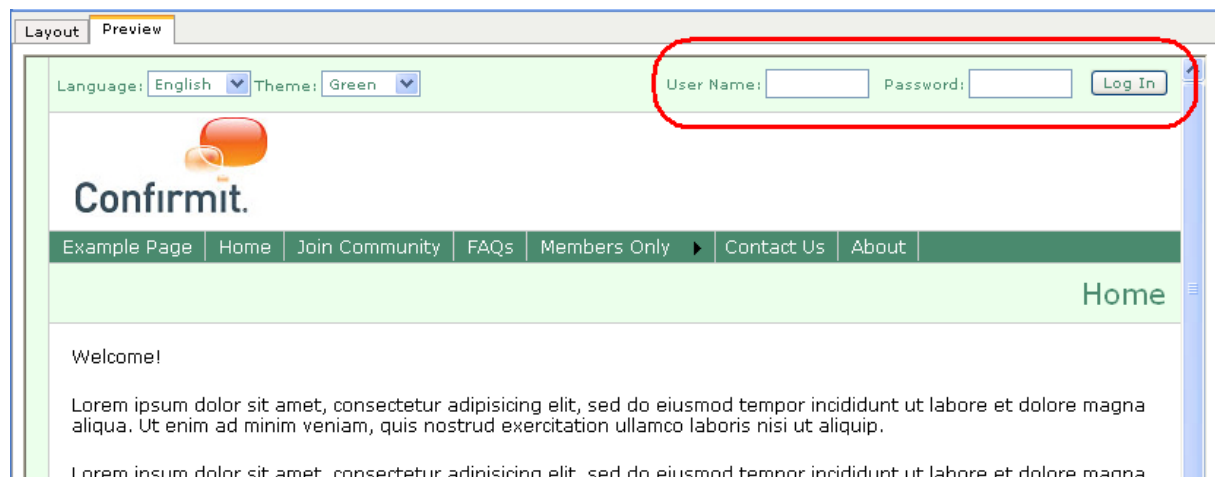


Figure 58 Example of the Login component in use

5.3.4.7.3. 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.

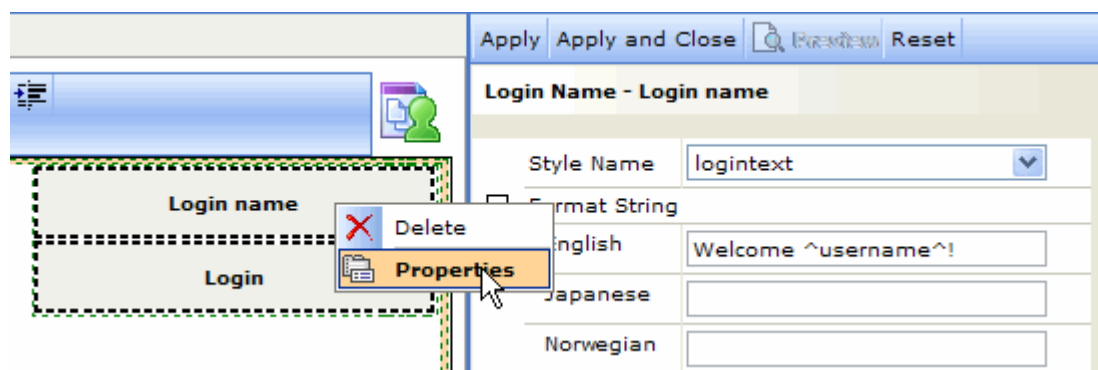


Figure 59 Setting up the Login name component

5.3.4.7.4. 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.

5.3.4.7.5. 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.

5.3.4.7.6. 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.

5.3.4.7.7. 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.

5.3.4.7.8. 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.

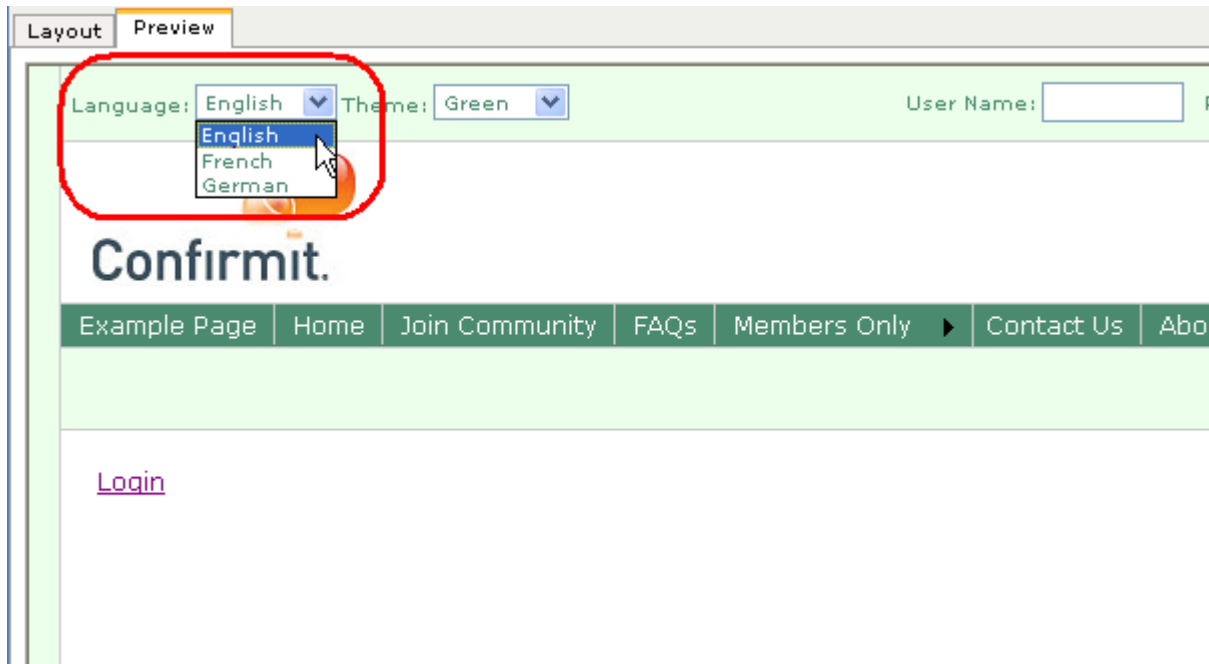


Figure 60 Example of the Language Selector in use

5.3.4.7.9. 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 (go to The Themes Folder on page 38 for more information).

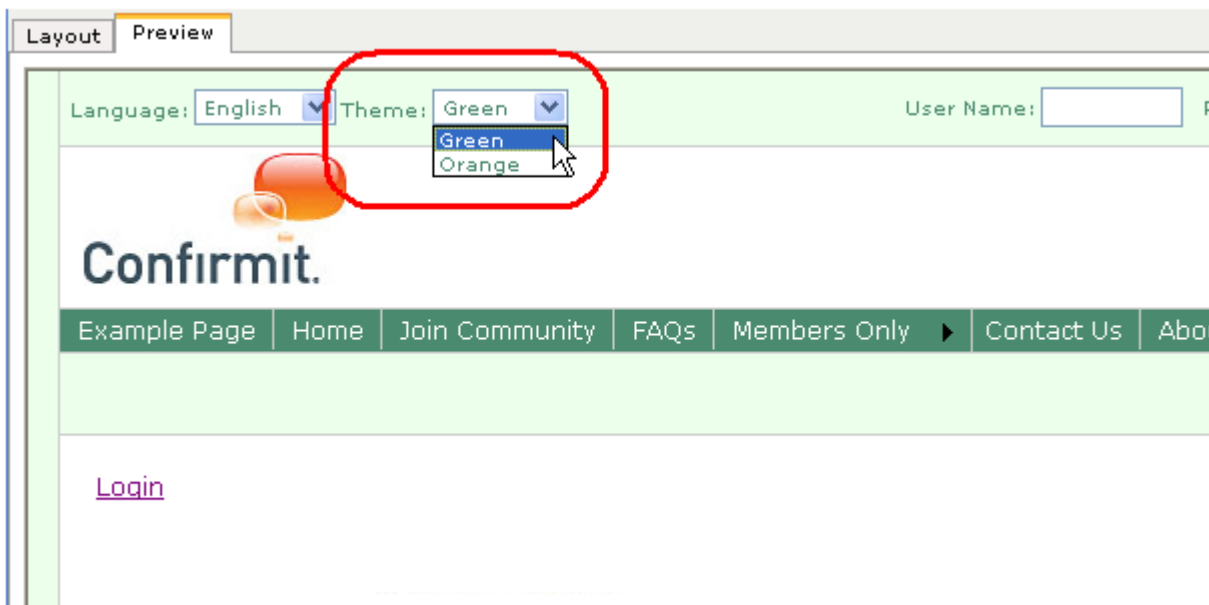


Figure 61 Example of the Theme Selector in use

5.3.4.7.10. 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.

5.3.4.7.11. Credit Balance

Confirmit 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.

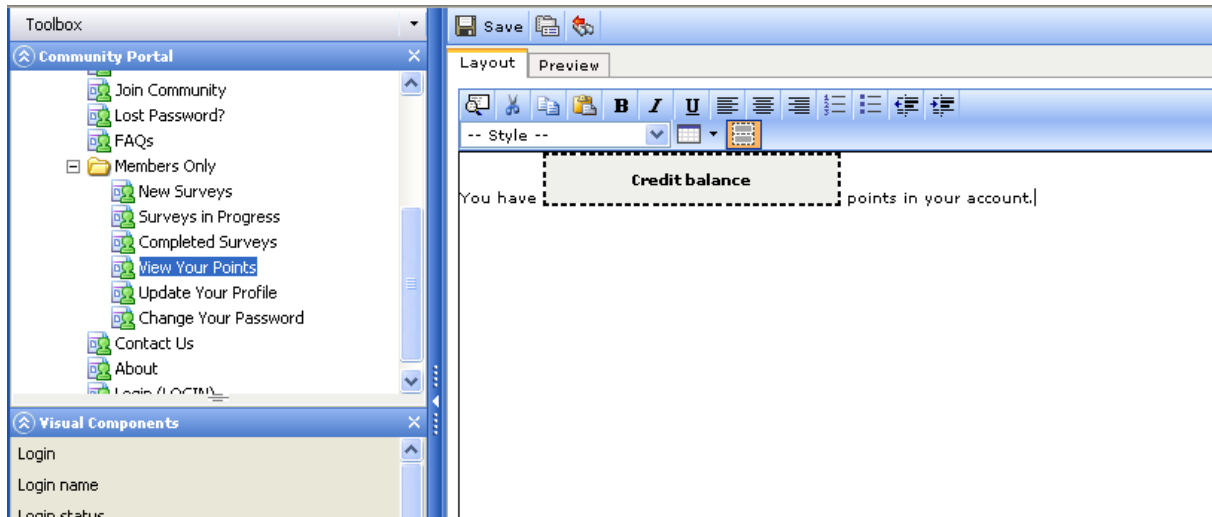


Figure 62 Example of the Credit Balance component in use

Note: You can import and export panelist credits (go to Panelist Credits on page 103 for more information).

5.3.4.7.12. 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 63 The Edit Profile component Properties page

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

5.3.4.7.13. 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.

5.3.4.7.14. 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.

5.3.4.7.15. 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.

5.3.4.7.16. Text

Use the Text component to display text on a portal page. Note that you can enter text directly onto a page (go to Free Text on page 61 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 Confirmit will display the text in the language chosen by the panelist via Language Selector (go to Language Selector on page 53 for more information).

5.3.4.7.17. Poll

You can link Polls to a Community Panel and embed the panel in the Community 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 Community Panel. This will automatically add "panelistid" to the project.

In Community 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.

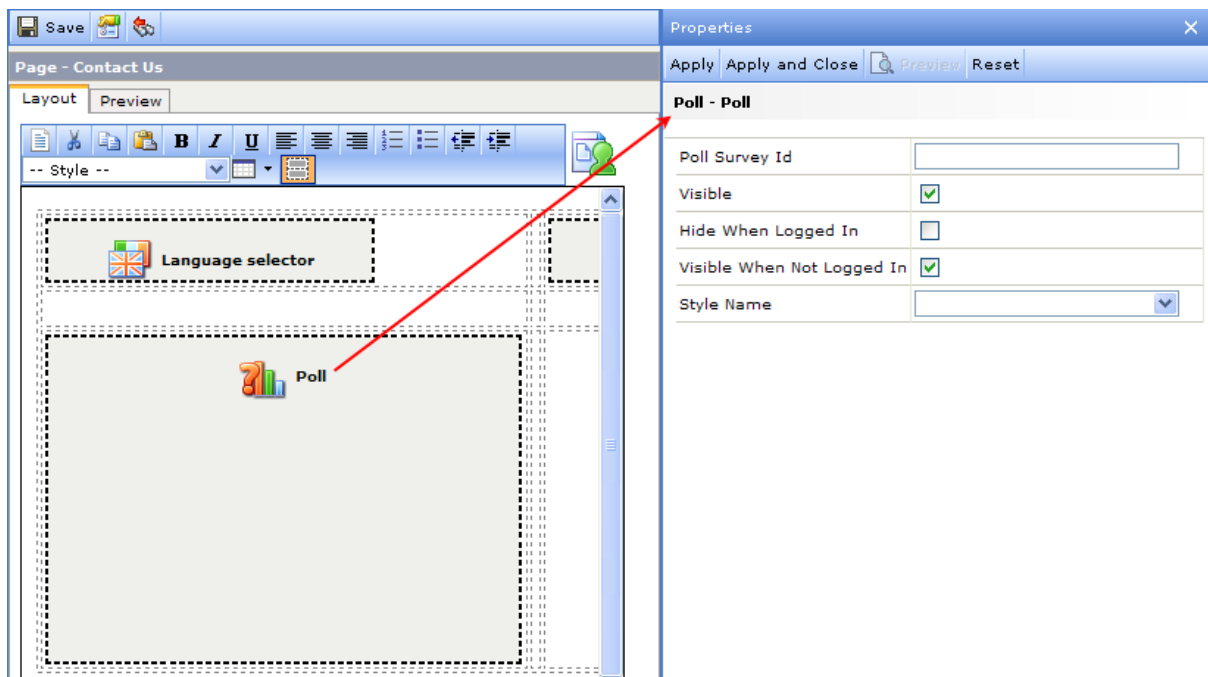


Figure 64 Setting the properties for a Poll visual component

5.3.5. Properties on a Community 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.

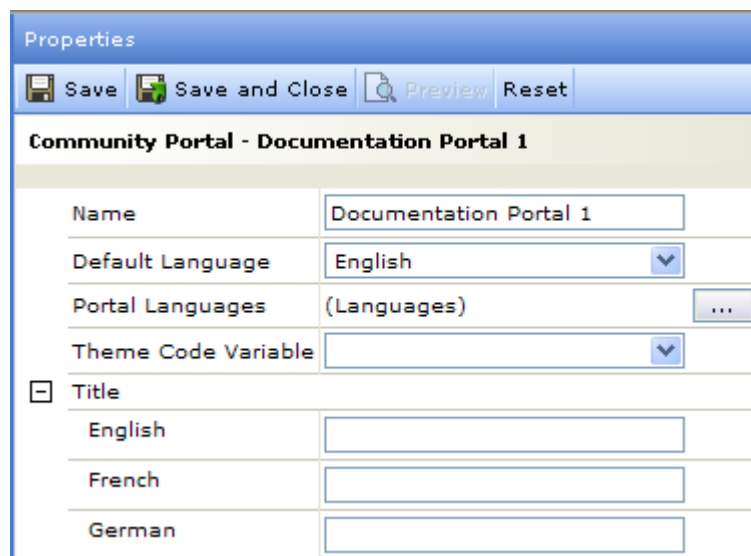


Figure 65 Setting the properties on the portal level

- 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 (go to The Theme Code Property on page 39 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.

5.3.5.1. Managing your Community Portals

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

5.3.5.1.1. How to Publish a Community Portal

Several Community 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.

Delete	Import Community Portal				New Community Portal
☐ Portal Name	Company	Created By	Created	Published	
☐ USA	Confirmit ASA	Andresen, Ole	16/10/2008 10:29:55	05/01/2009 12:27:36	
☐ Canada	Confirmit ASA	Andresen, Ole	20/11/2008 16:15:28	14/01/2009 13:38:17	
☐ USA backup	Confirmit ASA	Apple, Adam	14/01/2009 12:52:49	-	

Figure 66 Example of the Community Portals List, the default portal in bold

When a portal is published, the Community Portal URL becomes available from the **Project Management page > Overview tab** and any changes you make to the Community 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 Community 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 a particular set of panelists, and that portal is later unpublished, the those panelists will be presented with the default portal.

5.3.5.1.2. Testing your Community Portal

While working with the portals, you may need to test how different portals function together with your panel. Confirmit 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.

5.3.5.1.3. Managing your Community Portal within your Panel

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

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.

5.3.5.1.4. Managing your Community Portal Templates

The same Community Portal can be used on many different panels simultaneously. Whenever you save a portal as a template (go to How to Save a Portal as a Template on page 58 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 Community Portal templates is found under the **Home > Templates > Community Portal** menu command.

Name	Company	Created By	Created
General Portal (White BG)	FIRM AS	Confirmit, user	11/29/2005 9:19:36 AM
My Standard Portal	FIRM AS	Confirmit, user	11/29/2005 9:19:10 AM
Community Portal X	FIRM AS	Confirmit, user	11/29/2005 9:17:54 AM

Figure 67 Example of a Community 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 Confirmit users in your company is then displayed, so you can decide who in your company should have access to use this particular template.

5.3.5.1.5. How to Save a Portal as a Template

To save a portal as a template for later use:

- Right-click on the portal name and choose **Save as Template**.

An identical copy of the current portal is then saved as a template. You can make changes to the copy or the original without the other being affected.

5.3.5.1.6. How to Export a Community Portal

If you wish to make a Community 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.

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

The Properties dialog opens.

Figure 68 The Properties dialog when exporting a portal

- 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 (go to How to Import a Community Portal on page 31 for more information).

5.3.5.2. Editing your Page Masters and Portal Pages

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

The normal method of setting up a portal page (positioning the Visual Components) is to use HTML tables (go to How to Add an HTML Table to the Page on page 48 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) (go to Styles on page 42 for more information).

5.3.5.2.1. 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.

5.3.5.2.2. 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.

5.3.5.2.3. Table Properties

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

Properties	
Apply Apply and Close Preview Reset	
HtmlTableControl	
BackgroundColor	<input type="color"/>
Width	100%
Height	
CellPadding	
CellSpacing	
Border	

Figure 69 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**.

Properties	
Apply Apply and Close Preview Reset	
HtmlTableControl	
BackgroundColor	#FF00FF <input type="color" value="#FF00FF"/>
Width	100%
Height	
CellPadding	0
CellSpacing	0
Border	0

Figure 70 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.

5.3.5.2.4. 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 71 Cell properties

Here you can change the **background color**, **width** and **height**(go to Table Properties on page 59 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.

5.3.5.2.5. 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.

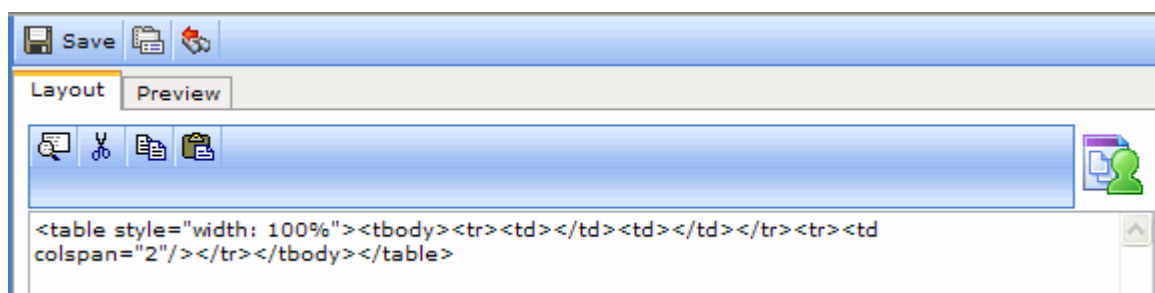


Figure 72 Example of the HTML editing mode

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

5.3.5.2.6. 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.

5.3.5.2.7. Images

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

If you are in HTML mode (go to HTML Mode on page 60 for more information) enter the **HTML code** (img tag) at the location where you want to insert the image.

If you are in WYSIWYG mode you can **copy and paste** an image onto the page. You can also drag the image from a website or browser and drop it in 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 images will not be moved to the Confirmit 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.

5.4. 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.

5.4.1. The Overview Tab

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

Search From 01/12/2007 To 14/12/2007					
Overview	Activity Logs				
	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 73 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.

5.4.2. 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	
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 74 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:
 - o **All** – shows all activities.
 - o **OK** – shows all activities that were concluded correctly.
 - o **Abort** – shows only those activities that were aborted before completion.
 - o **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.

5.4.3. 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.

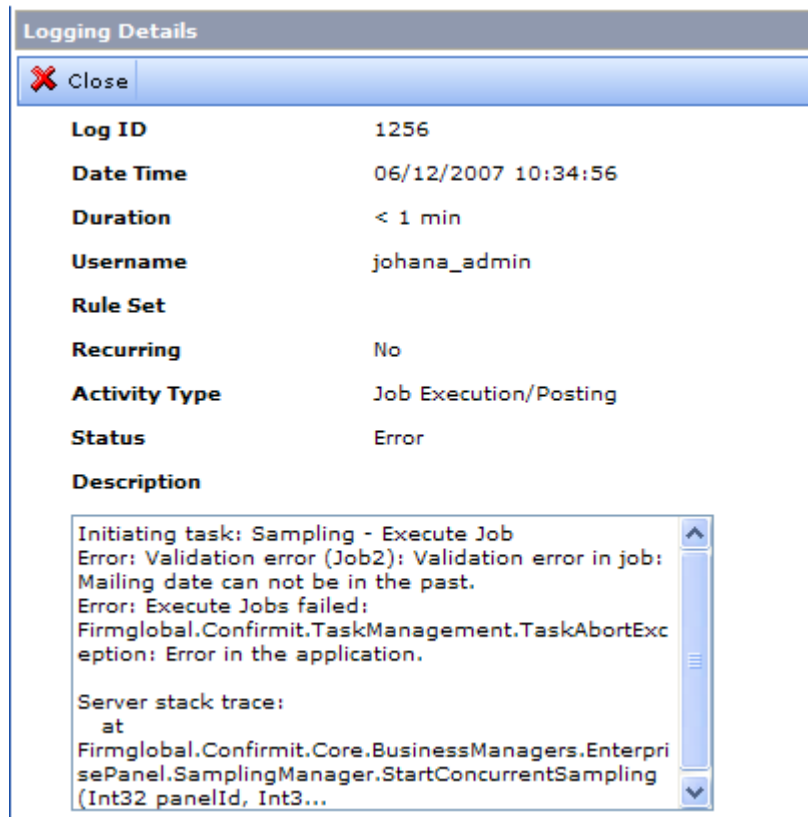


Figure 75 Example of the Logging Details page

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

5.5. 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 (go to How to Undelete an Object on page 13 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.

5.6. 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 as the source and Panel DB as the target.

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 (go to How to Create a New Survey Rule Template on page 193 for more information).

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

The dialog shown in the figure below opens.

Figure 76 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 (go to The Sampling Jobs List on page 179 for more information).

5.6.1. 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.

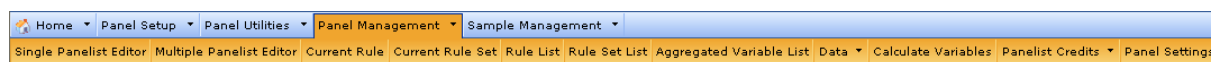


Figure 77 The Panel Management menu

6.1. Single Panelist Editor

This page lists the panelists registered in the database. In the upper pane, each panelist is presented as his/her response ID, in numerical order. In this pane you can specify the data columns that are to be displayed, and filter the list to focus on particular panelists.

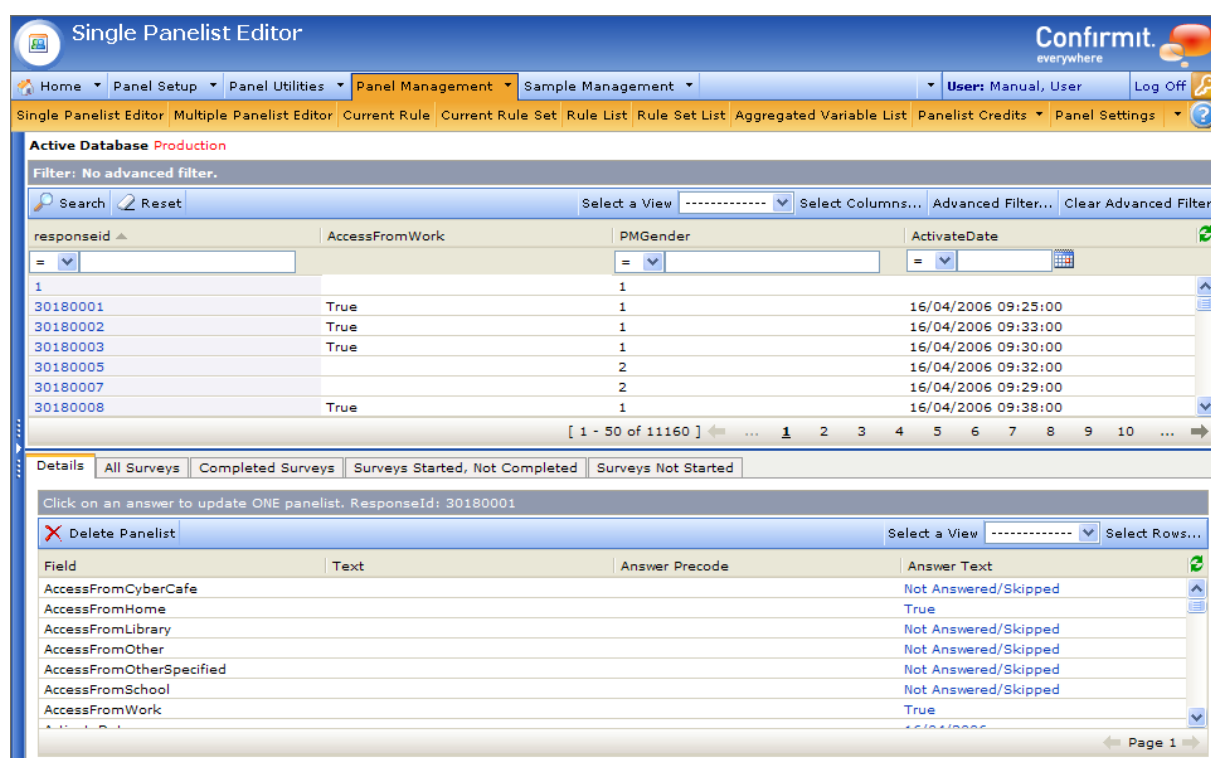


Figure 78 Example of a panelist list in the Edit window

To select a panelist for editing, click the panelist's Response ID number. The selected panelist's details are then displayed in the Details pane in the lower part of the Confirmit window (go to The Panelist Editor Tabs on page 67 for more information).

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**.

6.1.2. 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.

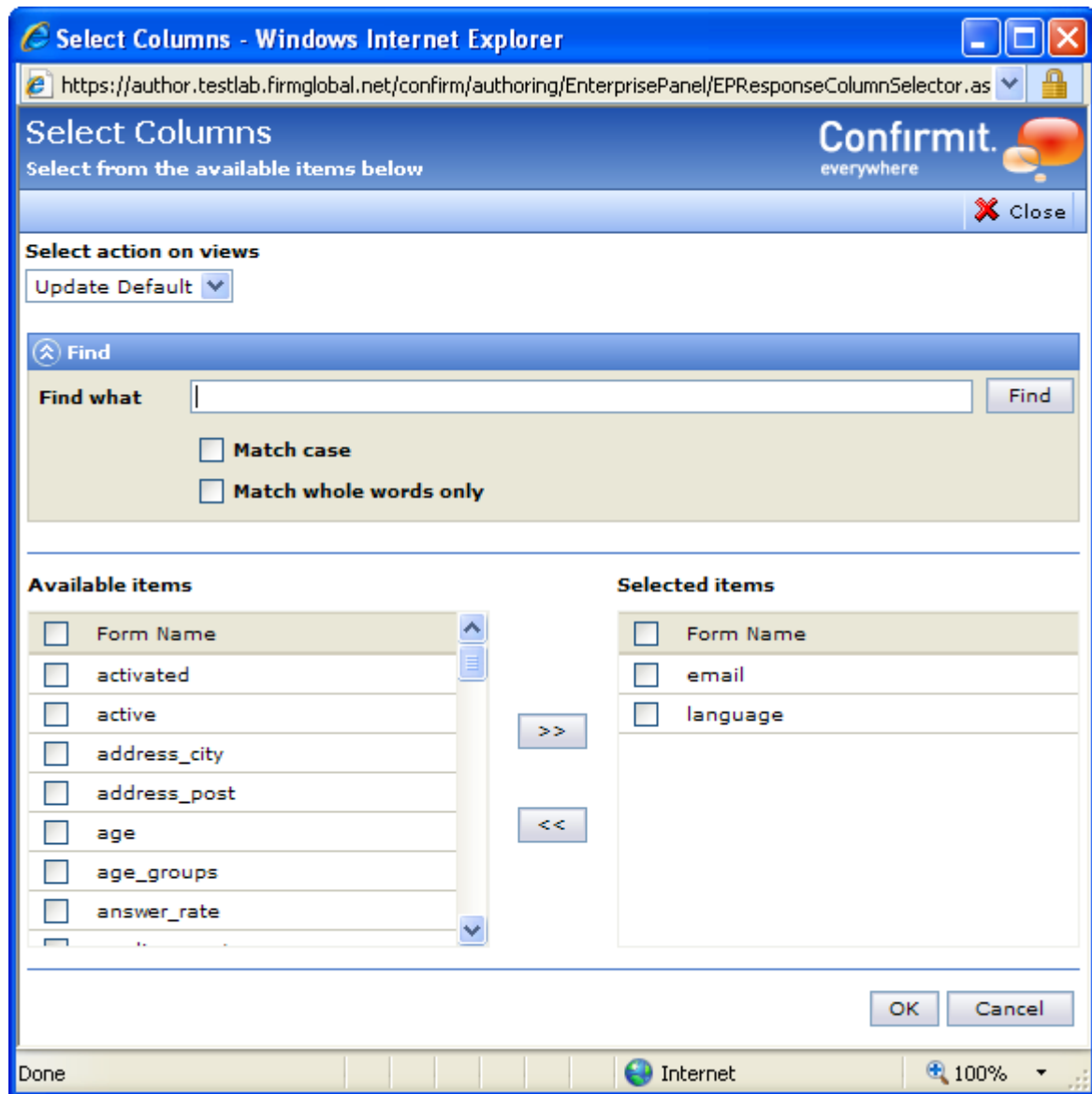


Figure 79 Example of the Select Columns window

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 part 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**.

6.1.3. 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.

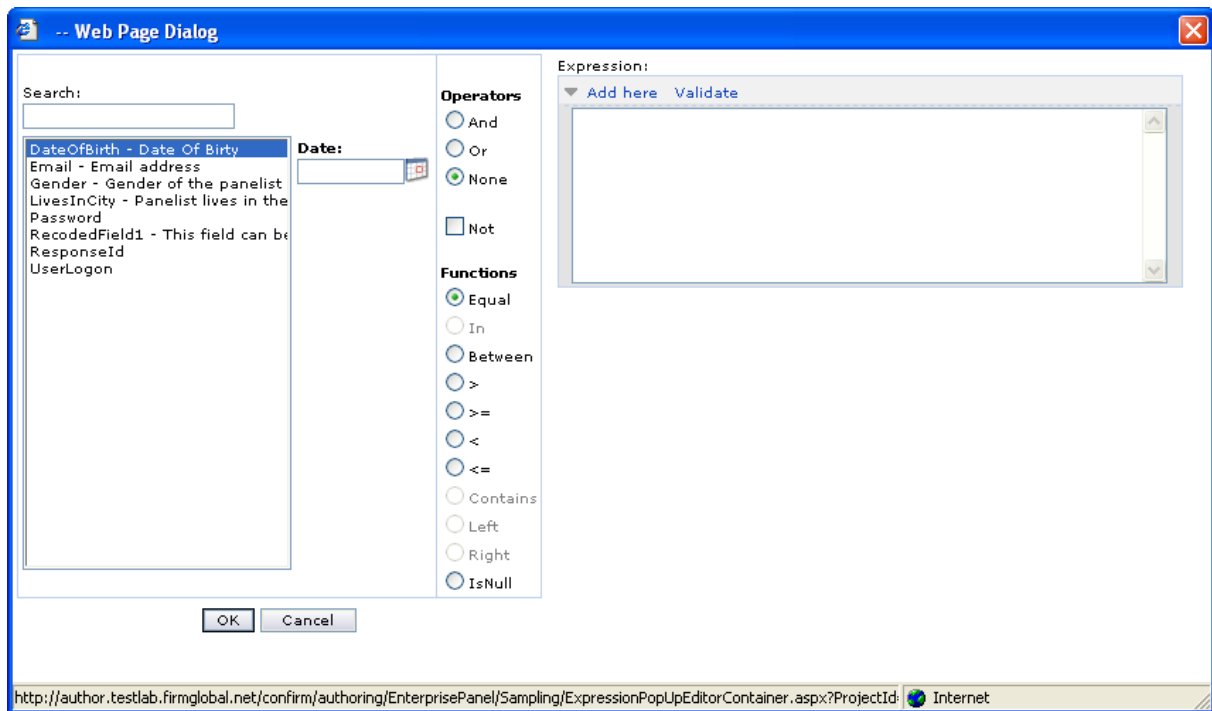


Figure 80 Example of the Advanced Filter window

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.

6.1.4. Clear Advanced Filter

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

6.1.5. The Panelist Editor Tabs

These tabs display the information relevant to the selected panelist.

6.1.5.1. The Details Tab

This tab shows the details of the selected panelist.

Click on an answer to update ONE panelist. ResponseId: 1

Select a View: Select Rows: ...

Field	Text	Answer Precode	Answer Text
CreatedDate			22/07/2010 16:42:00
dob			02/06/2010 00:00:00
email			aleth@confirmit.com
ModifiedDate			22/07/2010 16:42:00
Password			[VALUE HIDDEN FOR SECURITY REASONS]
Unsubscribed			False
UnsubscribedDate			Not Answered/Skipped

Page 1

Figure 81 Example of the Details tab for a selected panelist

The Created Date and Modified Date fields 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.

Update country - Windows Internet Explorer

https://author.testlab.firmglobal.net/confirm/authoring/EnterprisePanel/EPQuestionUpdate.aspx?ProjectId=p011

Update country

Select a new answer - Click 'OK' to update the response(s)

Confirmit. everywhere

Search

Answer Precode	Answer Text
☐ 1	US
☐ 31	Netherlands
☐ 32	Belgium
☐ 33	France
☐ 34	Spain
☐ 44	United Kingdom
☐ 353	Ireland
☐ 354	Iceland
☐ 358	Finland
☐ 370	Lithuania
☐ 371	Latvia

Page 1

Not answered ☒

Done Internet 100%

Figure 82 Example of a panelist details editing window

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".

6.1.5.3. 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".

6.1.5.4. 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.

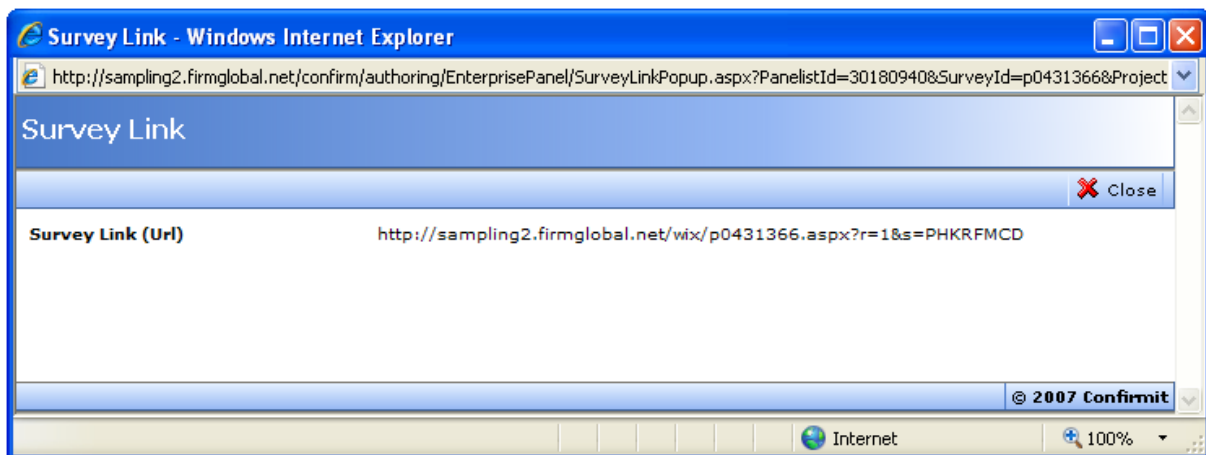


Figure 83 Example of the Survey Link window

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.

6.2. Multiple Panelist Editor

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.

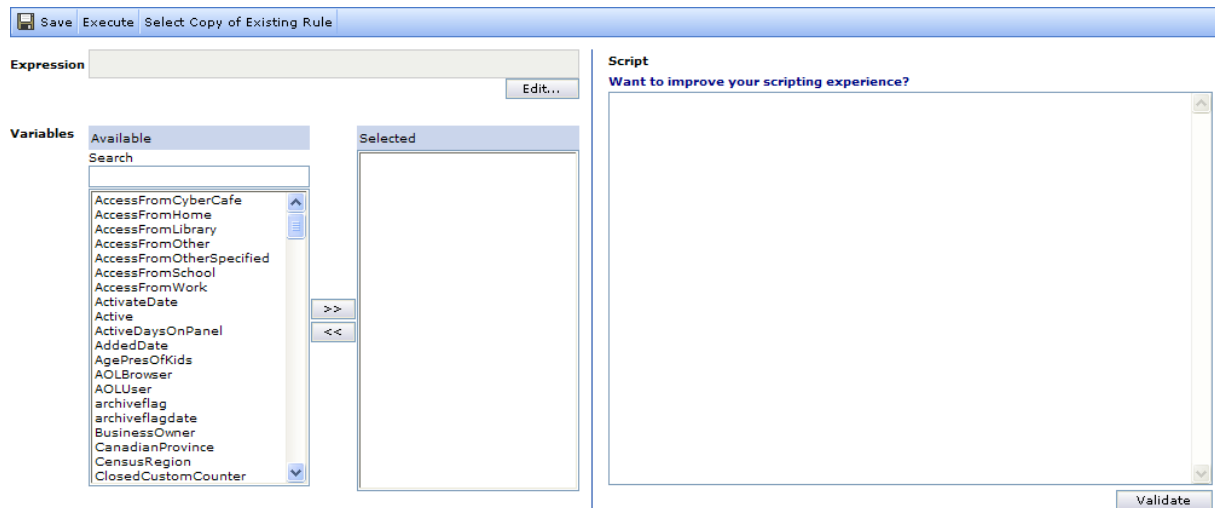


Figure 84 Example of the Multiple Panelist Editor page

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 (go to **Current Rule** on page 72 for more information).

Note: To simplify the scripting procedure you can download and use the **Code Completion** function. Refer to the **Authoring User Guide** for further details.

To create a condition:

1. Click **Edit**.

The Expression Editor window opens as shown below.

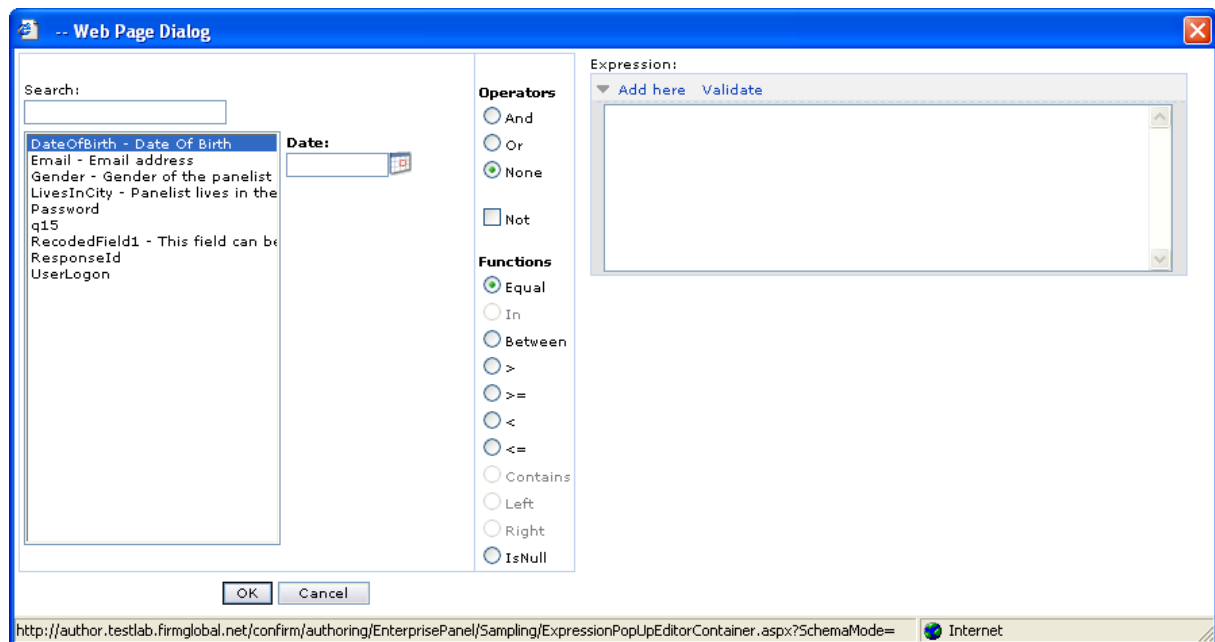


Figure 85 Example of the Expression Editor window

- o The left column lists all the questions/columns in the panelist database.
- o The second column lists the possible answers for the question/column selected in the first column.
- o The third column lists the operators and functions available for the question/column selected in the first column.

- o 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/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.

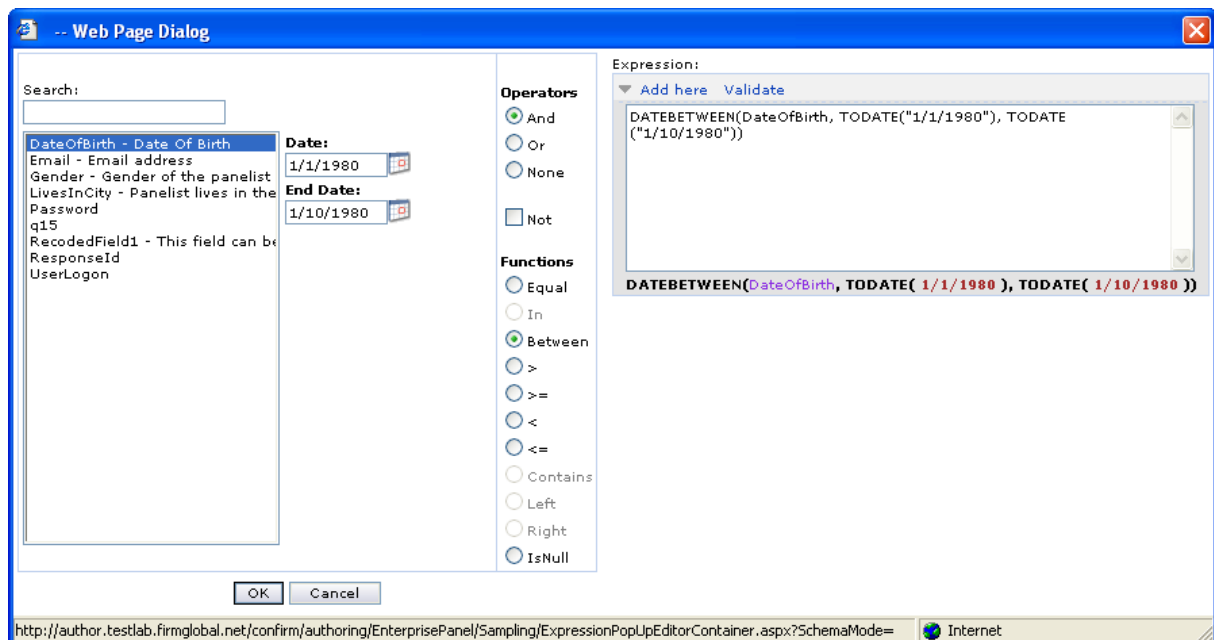


Figure 86 Example of an expression under construction

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.

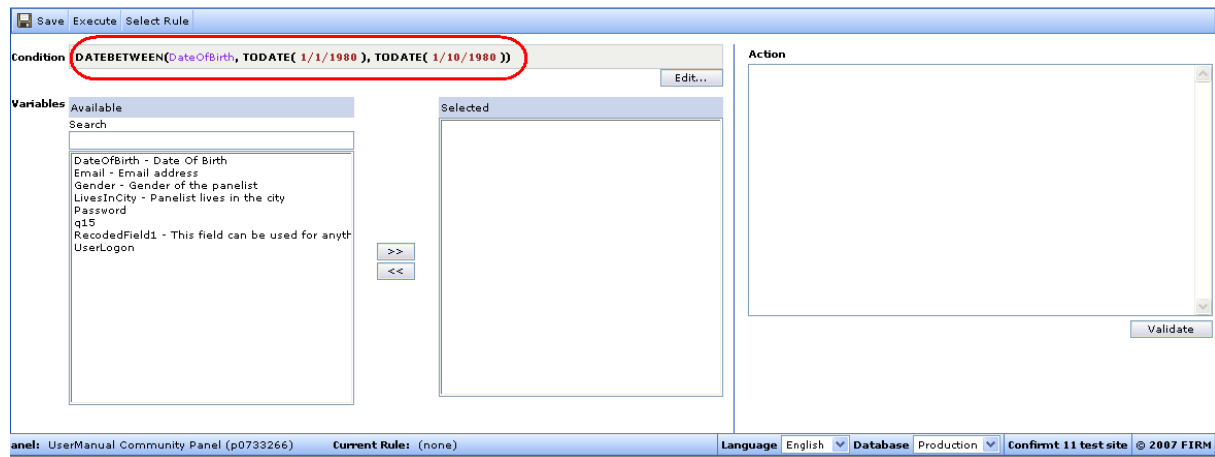


Figure 87 The Panelist Editor with the condition

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 (go to Current Rule on page 72 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 88 Example of a search result

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

6.3. Current Rule

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

The Current Rule page shows the details of the rule selected in the Rule List (go to Rule List on page 92 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.

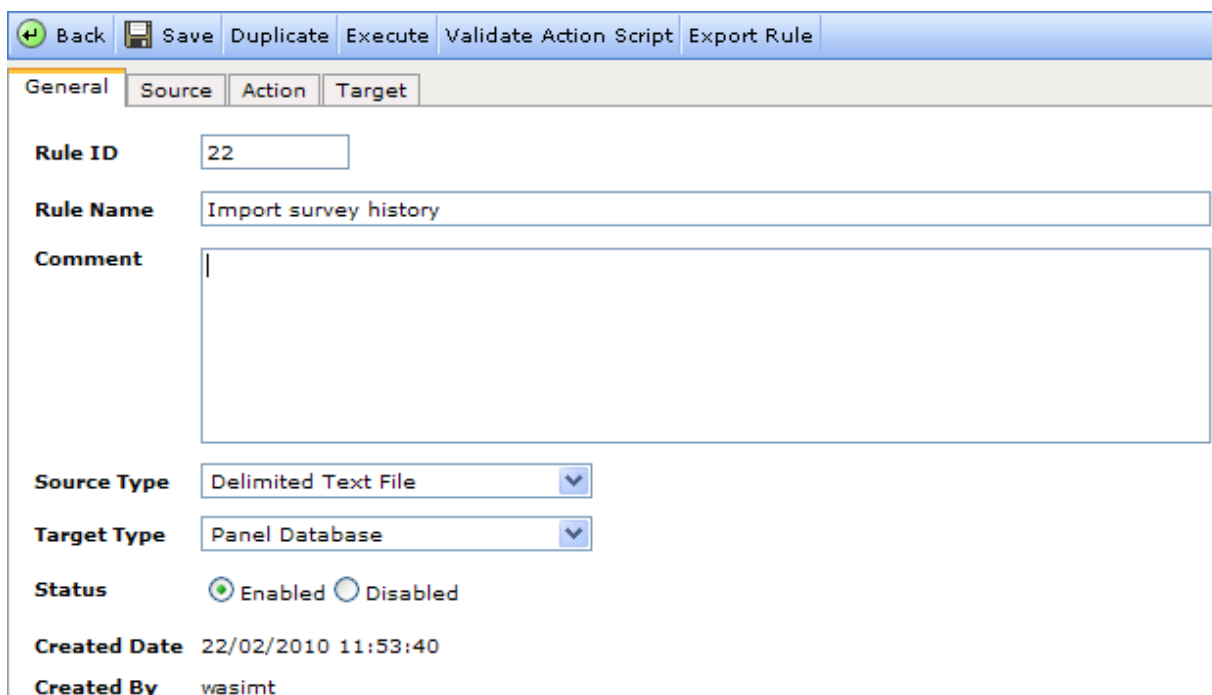
Note: Until you have selected a rule from the Rule List during the current session, the Current Rule menu command will take you to the Rule List.

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.

6.3.1. 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.



The screenshot displays the 'General' tab of the 'Rule Details' interface. At the top is a toolbar with icons and labels for 'Back', 'Save', 'Duplicate', 'Execute', 'Validate Action Script', and 'Export Rule'. Below the toolbar are four tabs: 'General' (active), 'Source', 'Action', and 'Target'. The 'General' tab contains the following fields:

- Rule ID:** A text box containing the value '22'.
- Rule Name:** A text box containing the value 'Import survey history'.
- Comment:** A large, empty text area for entering a comment.
- Source Type:** A dropdown menu currently set to 'Delimited Text File'.
- Target Type:** A dropdown menu currently set to 'Panel Database'.
- Status:** Two radio buttons; 'Enabled' is selected, and 'Disabled' is unselected.
- Created Date:** A label showing the date and time '22/02/2010 11:53:40'.
- Created By:** A label showing the username 'wasimt'.

Figure 89 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:
 - o **Enabled** – select to allow the rule to be run “as required”. This is the default setting.
 - o **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.

6.3.2. 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.

6.3.2.1. 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.

The screenshot shows the 'Source' tab of a configuration window. The 'Source Type' is set to 'Delimited Text File'. The 'Formatting' dropdown is set to 'Tab Separated'. The 'Locale' dropdown is set to 'English (United Kingdom)', and the 'Unicode' checkbox is unchecked. The 'Code Page' dropdown is set to '1252 - Western European (ISO)'. The 'Truncate Open Ends' field is set to '200', and the 'No Truncation' checkbox is unchecked. The 'Uploaded File' section shows a message: 'No source file has been uploaded. Upload file...'. The 'Pick up from FTP Location' section has an empty text field and a help icon. The 'File Handling' section has two radio buttons: 'Remove files from server after import' (selected) and 'Leave files on server'. A 'Map Fields' button is at the bottom.

Figure 90 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). Confirmit 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 Confirmit's FTP location. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed, so you must add only the file name to this field. 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 Confirmit. If the source file has been encrypted by the sender using your PGP public key, you will need to decrypt the files using your private key. Note that an administrator setting makes it possible to force every Confirmit user within a company to use encryption and FTP server during data transfer.
 - **Map Fields** - Use this to map fields/columns with different names in source and target, from the source to the Confirmit 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** ([go to Mapping Fields on page 88 for more information](#)).
 4. Click **Save** to save the changes.

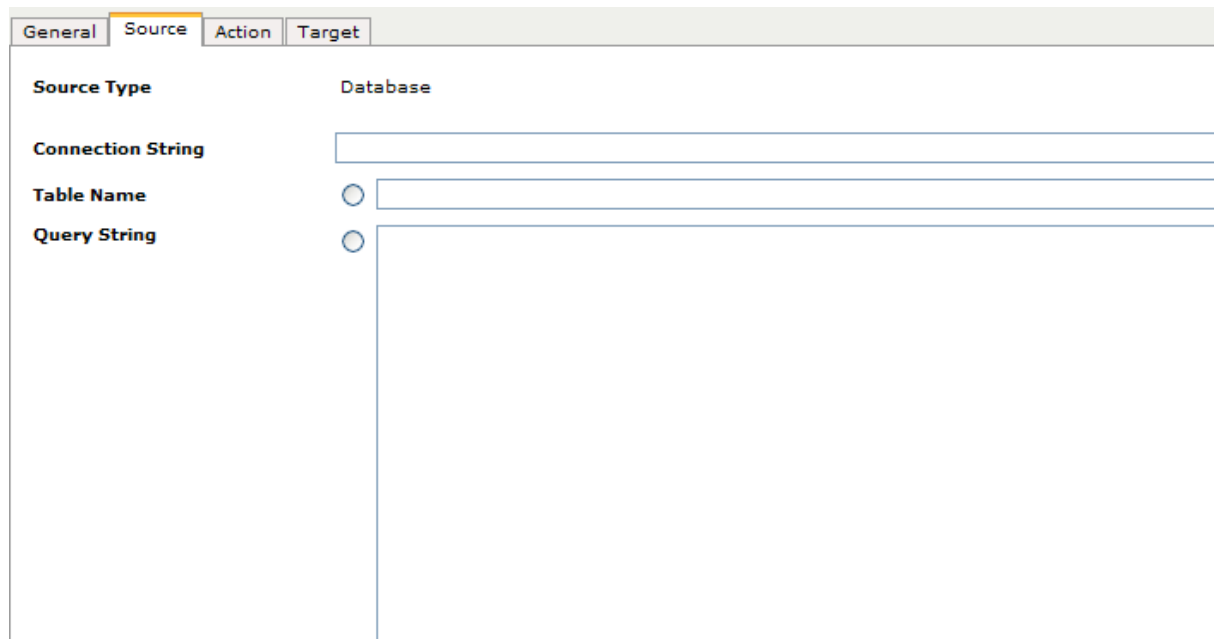
Note: If you have more than one BitStream data source in a panel and use rules to update them ([go to Target Type > BitStream Files on page 85 for more information](#)), then when you need to update one BitStream set it is very important that you update all of them. If this is not done, then the “not-updated” 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.

6.3.2.2. 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.



The screenshot shows a web interface with four tabs: 'General', 'Source', 'Action', and 'Target'. The 'Source' tab is active. It contains a form with the following fields:

- Source Type**: A dropdown menu with 'Database' selected.
- Database**: A text input field.
- Connection String**: A text input field.
- Table Name**: A radio button followed by a text input field.
- Query String**: A radio button followed by a large text area.

Figure 91 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.

6.3.2.3. Source Type > Panel Database

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

The screenshot shows the 'Source' tab of a configuration window. At the top, there are four tabs: 'General', 'Source' (selected), 'Action', and 'Target'. Below the tabs, the 'Source Type' is set to 'Panel Database'. The 'Expression' field is empty, with an 'Edit...' button to its right. The 'Community Panel Variables' section contains a search bar and a list of variables: email, PanelistCreatedDate, PanelistModifiedDate, Unsubscribed, and UnsubscribedDate. To the right of this list is a 'Selected' list and a 'Variable Properties' section with radio buttons for Date, Numeric/Text, Boolean, and Multi. The 'Survey History Variables' section has a checked box for 'Specify Survey History Variables' and a list of variables: CompletedDate, GroupNumber, InvitationDate, JobIsClosed, ReservedDate, StartDate, and SubSampleNumber. To the right of this list is another 'Selected' list. Arrows between the lists indicate the ability to move variables between them.

Figure 92 The Source tab with Panel Database selected as the Source Type

- **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 (go to Multiple Panelist Editor on page 69 for more information).
- **Community Panel Variables** - Search for and select the variables you wish to use. Note that if the target is set to Delimited Text File, then the Variable Properties field becomes available.
- **Survey History Variables** – this option only becomes available if the Target type is Delimited Text File or Bitstream Files. Check the box and select the required variables.

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.

6.3.2.4. Source Type > Survey Database (Synchronization)

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

Figure 93 The Source tab with Survey selected as the Source Type

Note: The Execute button is not available for this Source Type selection.

Note: When you select Source Type to be Survey Database, 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 (go to Target Type > Panel Database on page 85 for more information).

- **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.
- **Community 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 (go to The Action Tab on page 81 for more information).
- **Survey History Variables** – the fields in the Survey History table.

Important:

Surveys using batch statusung 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.

6.3.2.5. 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.

The screenshot shows the 'Source' tab of a configuration window. At the top, there are four tabs: 'General', 'Source' (which is active), 'Action', and 'Target'. Below the tabs, the 'Source Type' is set to 'BitStream Files'. The 'Data Source' is a dropdown menu currently showing 'All'. Below that is an 'Expression' text field. To the right of the 'Expression' field is an 'Edit...' button. The 'BitStream variables' section consists of two panels: 'Available' and 'Selected'. The 'Available' panel has a search bar and a list of variables including 'AccessFromHome', 'AccessFromOther', 'AccessFromOtherSpecified', 'AccessFromSchool', 'ActivateDate', 'Active', 'ActiveDaysOnPanel', 'AddedDate', 'AOLBrowser', 'AOLUser', 'archiveflag', 'archiveflagdate', 'CanadianProvince', 'CensusRegion', 'ClosedCustomCounter', 'ClosedJobsCounter', 'ClosedTrackerCounter', and 'CNRCounter'. The 'Selected' panel shows a list of variables that have been moved from the 'Available' list: 'AccessFromCyberCafe', 'AccessFromLibrary', 'AccessFromWork', 'AgePresOfKids', and 'BusinessOwner'. Between the two panels are two buttons: '>>' and '<<'. At the bottom, there is a 'Survey History Variables' section with a checkbox labeled 'Specify Survey History Variables' which is currently unchecked.

Figure 94 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 (go to Multiple Panelist Editor on page 69 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.

6.3.2.6. Source Type > Survey Database

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

The screenshot shows the 'Source' tab of a configuration window. At the top are four tabs: 'General', 'Source' (highlighted), 'Action', and 'Target'. Below the tabs, the 'Source Type' is set to 'Survey Database'. There are three main sections: 'Project IDs' with a radio button and a text field next to a 'Select projects' button; 'Keyword Filter' with a radio button and a text field next to a help icon; and 'Use Test Database' with a checkbox. A 'Data Filter' section is enclosed in a box and contains: 'Interview status filter' with five checkboxes (Complete Responses, Incomplete Responses, Screened, Quota Full, Error); an 'Expression' field with an 'Edit...' button; 'Date Filter' with 'Start Date' and 'End Date' fields and calendar icons; and 'Data to be included' with a dropdown menu set to 'All Data' and a note '(Only applies to recurring tasks)'. Below the 'Data Filter' box is the 'Columns' section with three radio buttons: 'All Columns (no filter)' (selected), 'Select... (no filter column selected)' (with a 'Select columns' link), and 'Survey Data Template' (with a 'Select template' button).

Figure 95 The Source tab with Confirmit Survey Data 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 (go to Mapping Fields on page 88 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.

6.3.3. 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.

You can simplify your scripting task by downloading the Code Completion add-on. See below for details.

Fields selected in the Source tab (go to 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.

6.3.3.1. The Code Completion Functionality

Code Completion is a downloadable 3rd-party add-on that means that you no longer need to remember or look up which properties belong to which classes and which parameters the various methods accept. Instead, these are available at the touch of a button. The add-on automatically color-codes key words, and provides lists of selectable options under specific conditions while scripting.

Code Completion must be installed locally. Once downloaded and installed, you must contact Confirmit to have the add-on activated at company level. The Code Completion functionality is then available in Confirmit wherever script coding can be used.

Refer to the Confirmit Authoring User Guide for further information.

Note: Code Completion is offered as a Beta, to be used by clients at their own risk. Support for this functionality will be offered, but not to the same extent as for the rest of the Confirmit application.

6.3.3.2. 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.

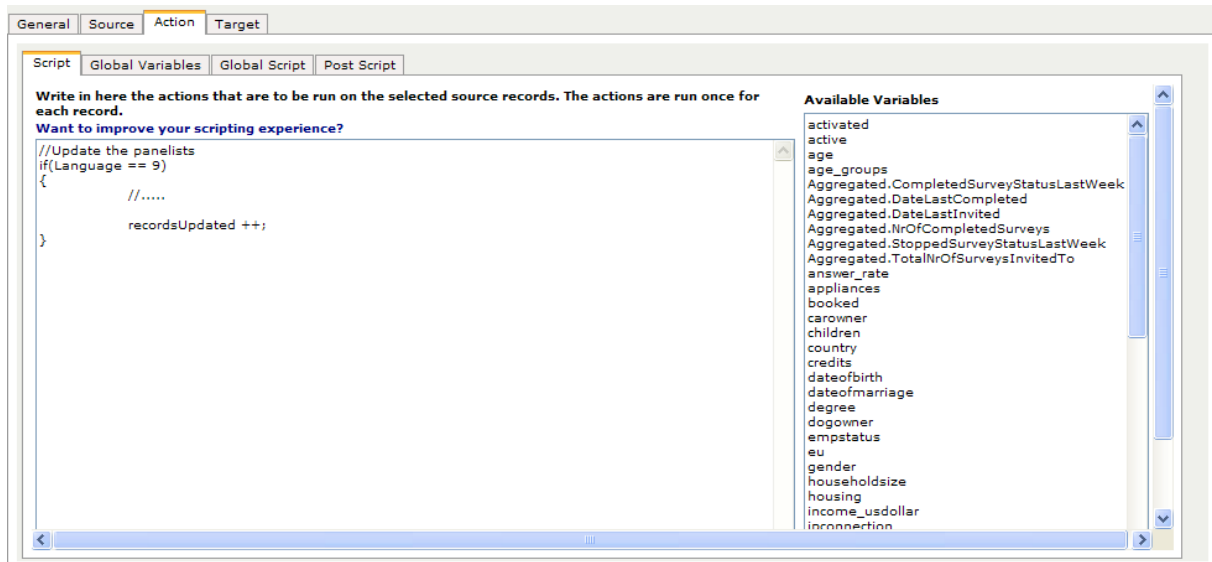


Figure 96 Example of the Script tab

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

6.3.3.3. The Global Variables Tab

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

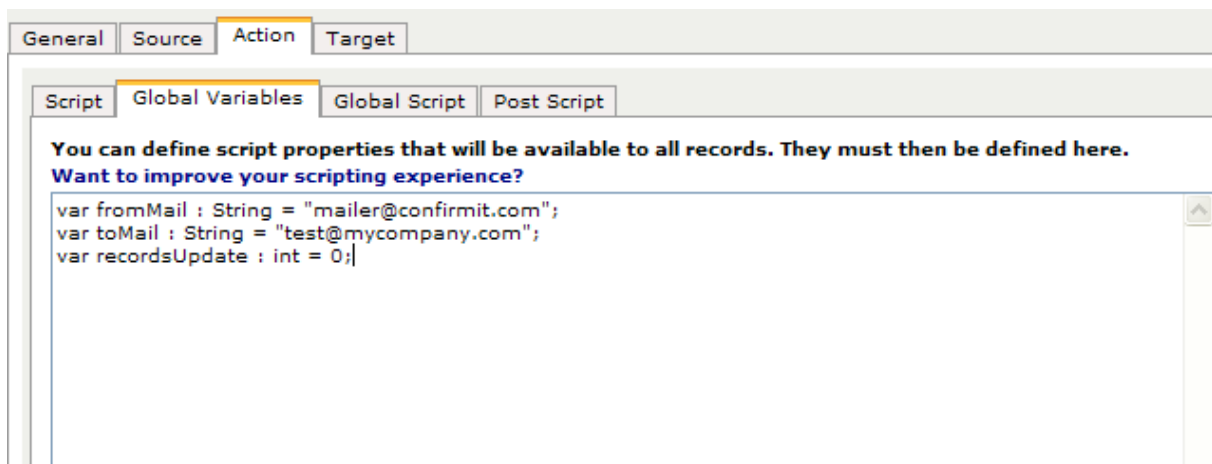


Figure 97 Example of the Global Variables tab

6.3.3.4. 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 98 Example of the Global Script tab

6.3.3.5. 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.

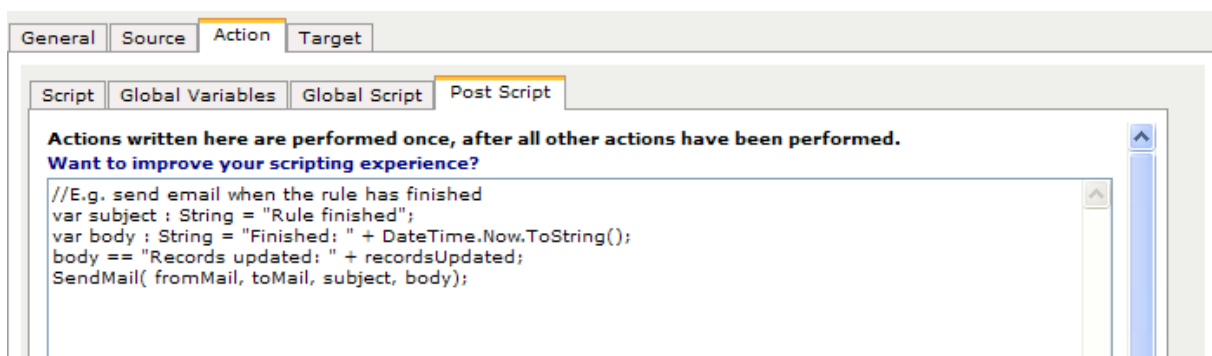


Figure 99 Example of the Post Script tab

6.3.4. The Target Tab

Use the Target tab to select the target for the data defined in the Source tab (go to The Source Tab on page 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.

6.3.4.1. Target Type > Delimited Text File

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

The screenshot shows the 'Target' tab of a configuration window. It contains several settings for data export:

- Target Type:** Delimited Text File
- File Name:** Test_file
- Formatting:** Tab Separated (with a dropdown arrow and a 'Set Export Field Name...' button)
- Custom Delimiter:** (empty text field)
- Locale:** English (United Kingdom) (with a dropdown arrow)
- Truncate Open Ends:** 200 (with a checkbox for 'No Truncation (Full Length)' and a help icon)
- Open End Handling:** Include Open Ends (with a dropdown arrow)
- File Transfer:** FTP (with a dropdown arrow and a help icon)
- Encrypt File:** ☒ (with a help icon)
- Email Address:** documentation@confirmit.com

Figure 100 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). Confirmit 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:
 - o **Include Open Ends** - all open end questions are included in the export.
 - o **Exclude Open Ends** - no open end questions are included in the export.
 - o **Open Ends Only (one row per respondent)** - only open end questions are included in the export file, with one row in the file for each respondent (all the answers for each respondent are in the same row).
 - o **Open Ends Only (one row per answer)** - only open end questions are included in the export file, with one row in the file for each answer given.
- **File 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 Confirmit. If the source file has been encrypted by the sender using your PGP public key, you will need to decrypt the files using your private key. Note that an administrator setting makes it possible to force every Confirmit user within a company to use encryption and FTP server during data transfer. 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.

6.3.4.2. Target Type > Database

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

The screenshot shows a software interface with four tabs: 'General', 'Source', 'Action', and 'Target'. The 'Target' tab is selected and highlighted. Inside the 'Target' tab, there are three labeled text input fields: 'Target Type' (containing 'Database'), 'Connection String', and 'Table Name'. Below these fields is a button labeled 'Mapping Setting...'.

Figure 101 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.

6.3.4.3. Target Type > BitStream Files

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

The screenshot shows the same software interface with the 'Target' tab selected. The 'Target Type' field now contains 'BitStream Files'. Below it are two text input fields: 'File Name' and 'BitStream Name'.

Figure 102 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

6.3.4.4. Target Type > Panel Database

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

The screenshot shows the software interface with the 'Target' tab selected. The 'Target Type' field contains 'PanelDatabase'. Below it is a dropdown menu for 'Target Mode' with 'Update Data' selected.

Figure 103 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** – specify how the source data is to be added to the database.
 You can choose between four modes for importing the data, listed below. In all the modes the user will be asked to provide a key (see Key field below). The keys available are respid, responseid, and any field in the survey database that has an index. To create an index on a field in a survey database, go to the question properties of the field and set the "Indexed" property (available on single and open text questions with a field width set), and then re-launch the survey. By employing this setting, you can then use for example email address, membership number etc. as a key. The rule executer reads the value of the selected key field in the incoming data file and checks to see if a row with the same key already exists in the target.

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

When you select Source Type to be Survey (go to 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 Confirmit Survey Database (go to Source Type > Survey Database on page 79 for more information), the target tab includes the **Map Fields** button (go to Mapping Fields on page 88 for more information).

6.3.4.5. Target Type > None

This type of "target" needs an Action script (go to 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.

6.3.4.6. Target Type > Snapshot Database

The Snapshot Database target type is used when rule is to copy data to a snapshot database (go to The Snapshot Panel on page 195 for more information). The fields available when Snapshot Database is selected as the Target Type are as shown below.

Figure 104 The Target Type tab when Snapshot Database is selected

- **Project ID** - the Snapshot project selected in the Overview page (go to Overview on page 22 for more information).
- **Column Mapping** - when you duplicate a standard project to create a snapshot project, the variables will be identical. If however you have built a snapshot project or wish to base it on a different project then you may have different variables in the two projects. Click this button to open a Mapping window where you can map the panel database variables to the snapshot database variables as required.

6.3.5. How to Duplicate a Rule

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

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

Figure 105 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.

6.3.6. 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 106 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 (go to The Sampling Jobs List on page 179 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.

6.3.7. Validating an Action Script

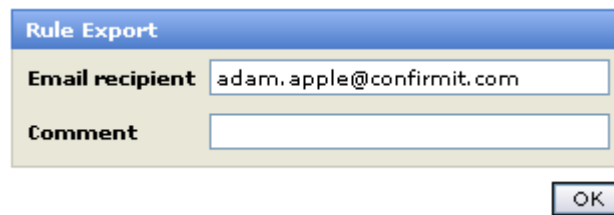
Click to check the script for compilation errors. If errors are found, they will be listed in a separate window. You must then correct the errors and validate again.

6.3.8. 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.



The 'Rule Export' dialog box has a blue header. It contains two input fields: 'Email recipient' with the value 'adam.apple@confirmit.com' and an empty 'Comment' field. An 'OK' button is located at the bottom right.

Figure 107 The Rule Export dialog

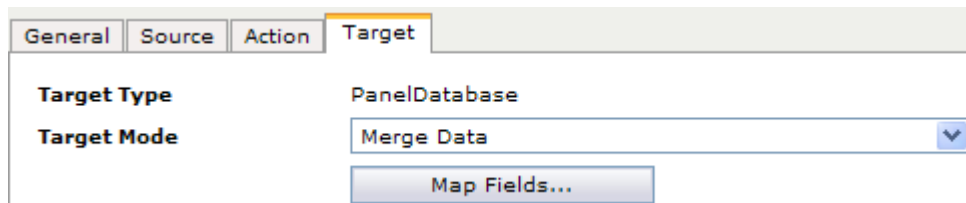
3. Edit the email address to which the rule is to be sent, and add a comment, as necessary.
4. Click **OK**.

An email is sent to the specified address with the rule attached. This rule must now be imported into the destination server (go to How to Import a Rule on page 94 for more information).

6.3.9. 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 Confirmit 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.

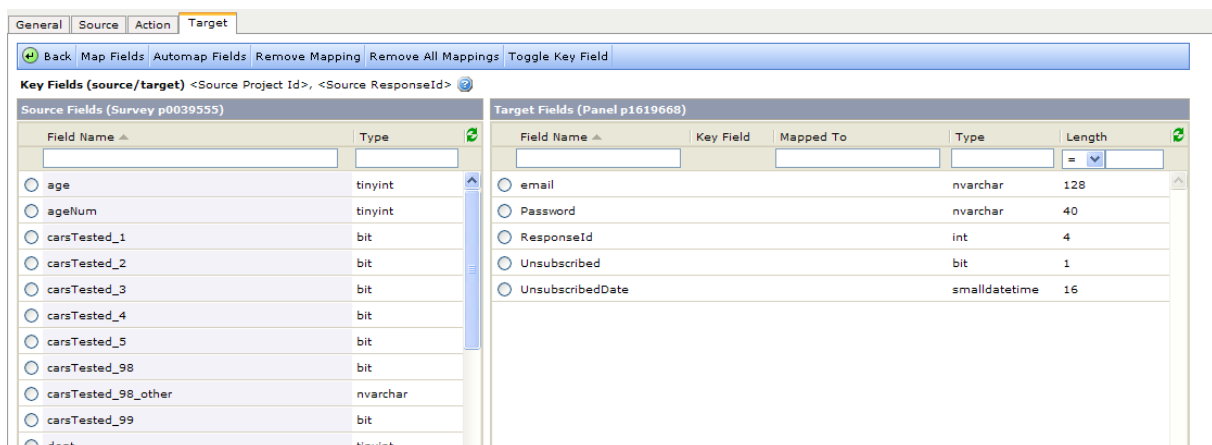
Note: When creating rules to upload .txt files from the FTP site, if the file exists on the FTP site when the rule is created then the Map Fields button will be available. If the file does not yet exist on the FTP site then the button will not be available.



The 'Target' tab is selected. It shows 'Target Type' as 'PanelDatabase' and 'Target Mode' as 'Merge Data'. A 'Map Fields...' button is visible at the bottom.

Figure 108 The Target tab with the Map Fields button

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



The 'Field Mapping' page shows two columns of fields: 'Source Fields (Survey p0039555)' and 'Target Fields (Panel p1619668)'. The source fields include 'age', 'ageNum', 'carsTested_1' through 'carsTested_5', 'carsTested_98', 'carsTested_98_other', 'carsTested_99', and 'deot'. The target fields include 'email', 'Password', 'ResponseId', 'Unsubscribed', and 'UnsubscribedDate'. A mapping is shown where 'age' is mapped to 'email'.

Field Name	Type	Key Field	Mapped To	Type	Length
age	tinyint		email	nvarchar	128
ageNum	tinyint				
carsTested_1	bit				
carsTested_2	bit				
carsTested_3	bit				
carsTested_4	bit				
carsTested_5	bit				
carsTested_98	bit				
carsTested_98_other	nvarchar				
carsTested_99	bit				
deot	tinyint				
			ResponseId	int	4
			Unsubscribed	bit	1
			UnsubscribedDate	smalldatetime	16

Figure 109 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.

Target Fields (Panel p1619668)				
Field Name ▲	Key Field	Mapped To	Type	Length
			= ▼	
☐ email		name	nvarchar	128
☐ Password			nvarchar	40
☐ ResponseId		responseid	int	4
☐ Unsubscribed			bit	1
☐ UnsubscribedDate			smalldatetime	16

Figure 110 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.

Back Map Fields Automap Fields Remove Mapping Remove All Mappings Toggle Key Field				
Key Fields (source/target) name/email				
Source Fields (Survey p0039555)		Target Fields (Panel p1619668)		
Field Name ▲	Type	Field Name ▲	Key Field	Mapped To
☐ age	tinyint	☐ email	🔑	name
☐ ageNum	tinyint	☐ Password		
☐ carsTested 1	bit	☐ ResponseId		responseid

Figure 111 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.

6.4. 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 (go to Rule Set List on page 95 for more information).

6.4.1. The General Tab

The Rule Set Details page opens at the General tab.

The screenshot shows a web interface for managing rule sets. At the top, there are buttons for 'Back', 'Save', and 'Execute'. Below these are three tabs: 'General' (selected), 'Rule Management', and 'Report'. The 'General' tab contains the following fields:

- Rule Set ID:** A text box containing the value '41'.
- Rule Set Name:** A text box containing the value 'Doc1'.
- Type:** A dropdown menu with 'Recurring' selected.
- Comment:** A large text area containing the text 'No comment'.
- Status:** Two radio buttons, 'Enabled' (selected) and 'Disabled'.
- Disable Sampling When Executing:** A checkbox that is currently unchecked.
- Date Created:** 26/08/2008 09:32:57
- Created By:** usermanual
- Date Updated:** 26/08/2008 09:33:16
- Updated By:** usermanual

Figure 112 Example of the Rule Set Details page > General tab

- **Rule Set ID** – the identification number for the rule set. This number is generated automatically by Confirmit and cannot be changed.
- **Rule Set Name** – the name given to the rule set when it was created/last edited. You can change this name as required.
- **Type** – the type of rule set. The options are:
 - o **Ad Hoc** – a rule set that is created for a specific use/event.
 - o **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.
 - o **Enabled** –allows the rule to be run “as required”. This is the default setting.
 - o **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.

6.4.2. The Rule Management Tab

Use this tab to specify what is to occur in the event Confirmit discovers an error whilst the rule set is running. To set up the properties for a rule in the set, double-click on the rule in the left column to open the Details page.

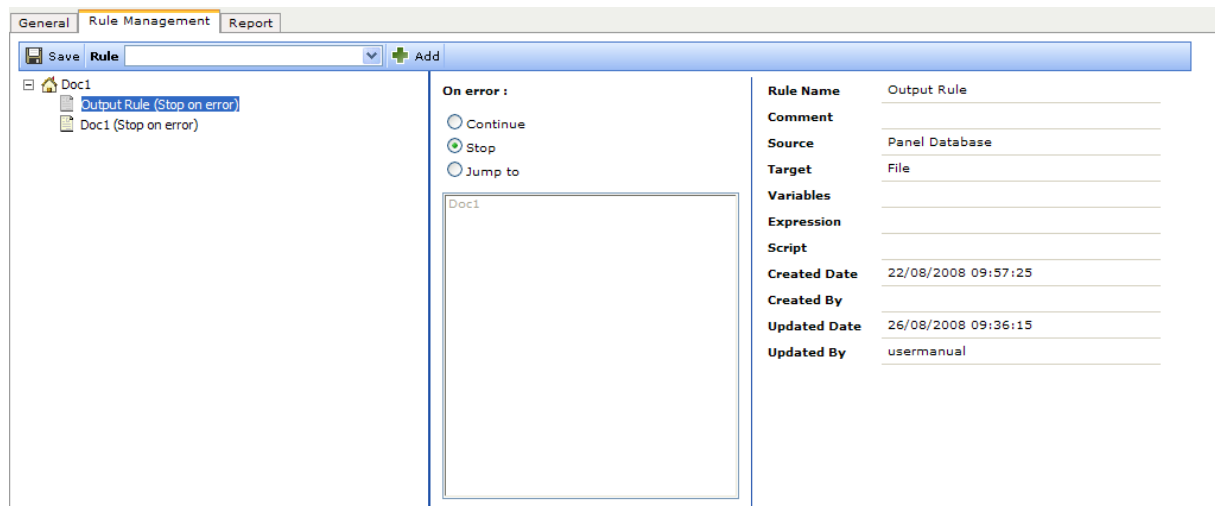


Figure 113 Example of the Rule Management tab

- **On error** – select the function you wish to occur in the event Confirmit discovers an error whilst the rule set is running. The options are:
 - o **Continue** – select this option if you wish the rule set to continue running.
 - o **Stop** – select this option if you wish the rule set to be stopped.
 - o **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.

6.4.2.1. 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 (once a rule is added to the set, it is removed from the list).

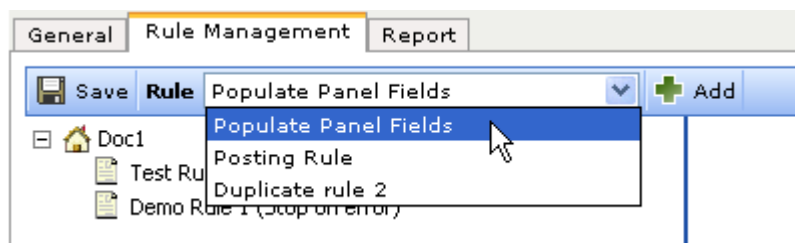


Figure 114 Selecting a rule to add to the rule set

3. Select the required rule from the list and click **Add**.
The rule is added to the rule set.

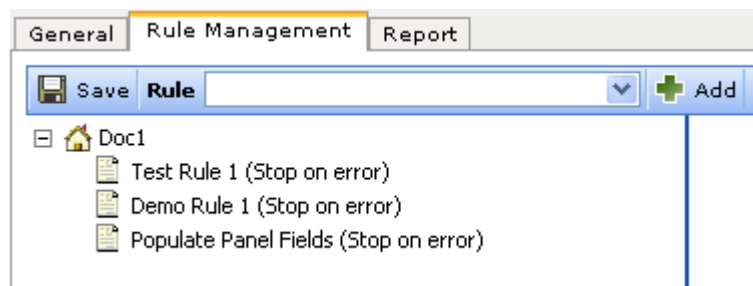


Figure 115 The rule added to the rule set

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.

6.4.3. The Report Tab

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

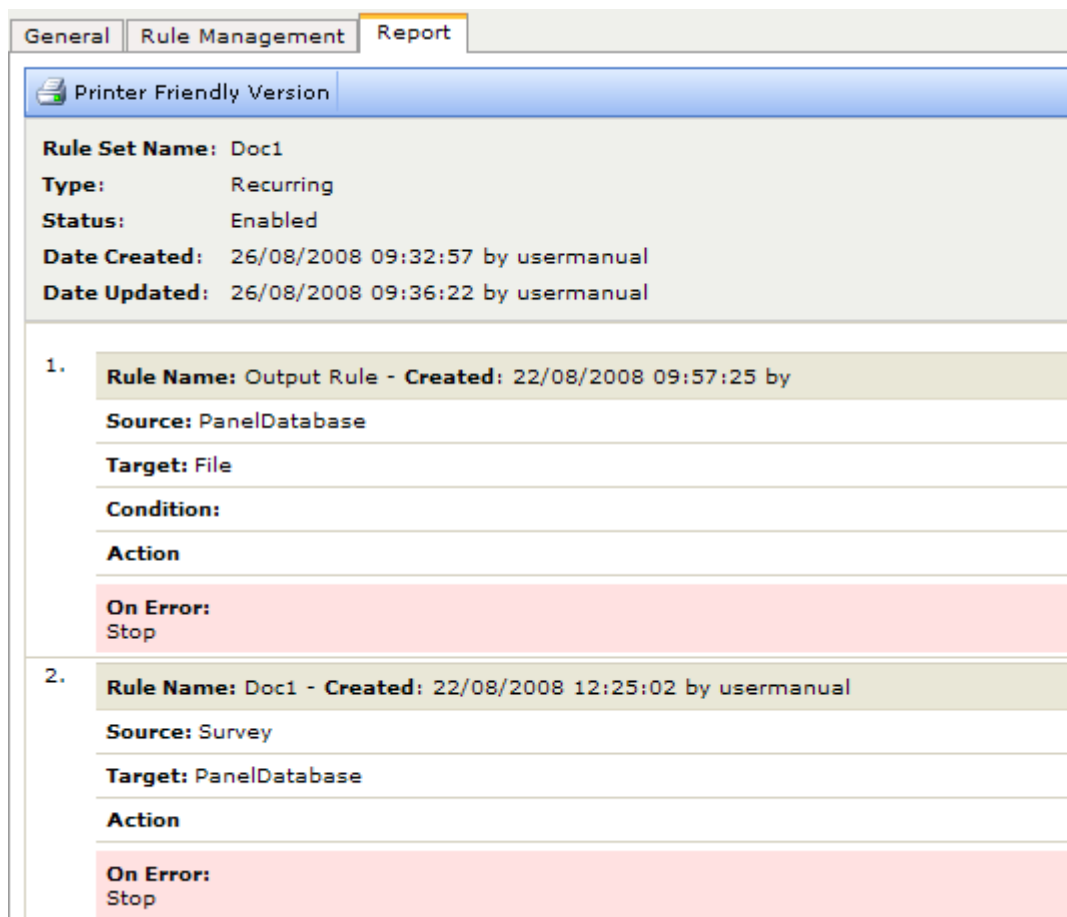


Figure 116 Example of the Report tab

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

6.5. 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.

Rule List								
Delete		Search		Status: Enabled	New Rule Import Rule			
ID	Rule Name	Source	Target	Rule Set Name	Created By	Last Executed	Last Executed By	
=		All	All			=		
1040	My rule	Panel Database	Panel Database	Doc1	johana_admin			
969	Generate Bitstre...	File	Bitstream Files		erikb	04/12/2007 14:23:27	erikb	
968	Import Survey H...	File	Panel Database		erikb	04/12/2007 14:21:17	erikb	
967	Import data	Panel Database	Panel Database		erikb	04/12/2007 14:19:26	erikb	

Figure 117 The Panel Rule List

Click on a Rule Name link to open the Current Rule page for that rule (go to Current Rule on page 72 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 a Rule Set, then it will be indicated here.
- **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.

6.5.1. 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.

Back Save	
General Source Action Target	
Rule Name	
Comment	
Status	☒ Enabled ☐ Disabled ☐ One Run Only
Created Date	26/08/2008 09:41:47
Created By	usermanual

Figure 118 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 status for the new rule. The options are:
 - o **Enabled** – select to allow the rule to be run “as required”. This is the default setting.
 - o **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.
 - o **One Run Only** – select to specify that the rule is to be run only once.
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 Panel Rule Details form (go to Current Rule on page 72 for more information), and the Source, Action and Target tabs become active. Go to these tabs and make the appropriate settings.

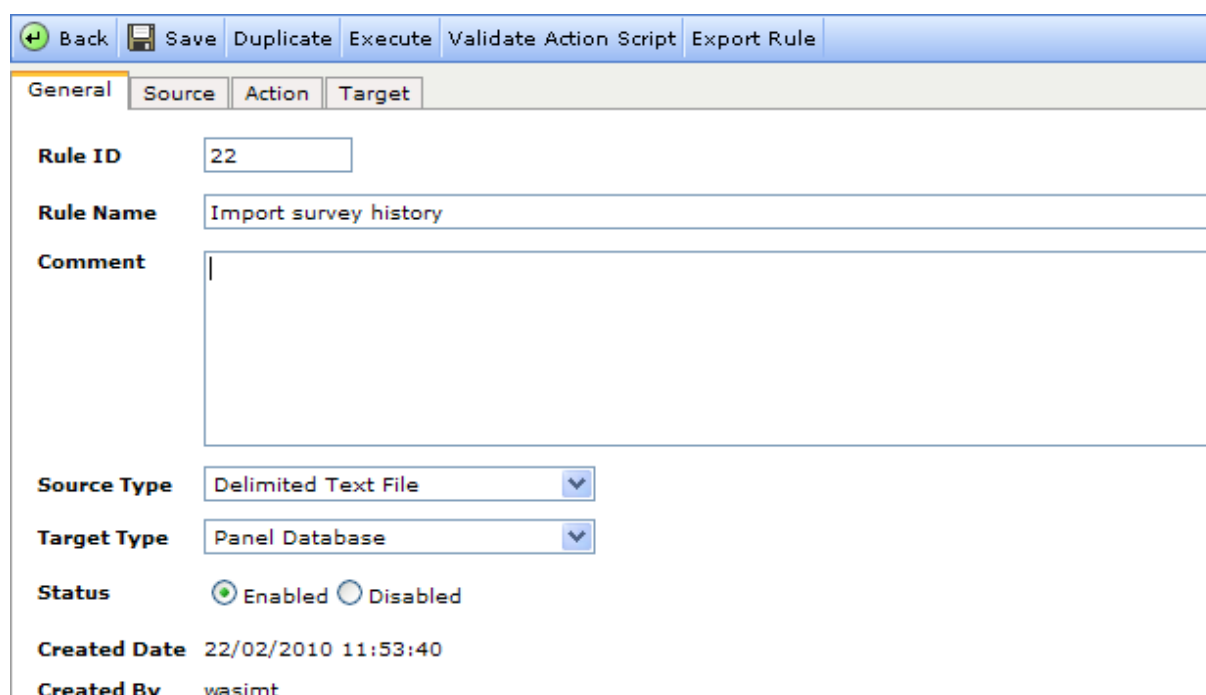


Figure 119 Example of the Panel Rule Details form

Note: A rule that creates BitStream files from the panel database must be created before sub samples can be created (go to How to Create a New Sub Sample on page 128 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.

6.5.2. How to Import a Rule

You can copy rules to other servers or panels by using the Rule Export / Import functionality (go to How to Export a Rule on page 87 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.



The Rule Import dialog box has a blue header bar with the text "Rule Import". Below the header, there are two input fields: "File to upload" and "Rule Name". The "File to upload" field has a "Browse..." button next to it. Below the "Rule Name" field, there is an "OK" button.

Figure 120 The Rule Import dialog

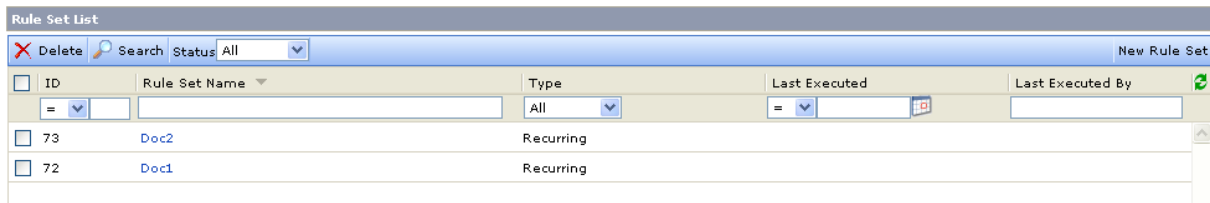
3. Browse to and select the file.
4. Type a name for the rule into the Rule Name field.
5. Click **OK**.

The rule is imported and added to the Rule List.

6. Click on the blue **Rule Name** link to open the rule in the Current Rule window (go to Current Rule on page 72 for more information).

6.6. Rule Set List

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



The Rule Set List window has a blue header bar with the text "Rule Set List". Below the header, there is a toolbar with buttons for "Delete", "Search", "Status" (set to "All"), and "New Rule Set". Below the toolbar, there is a table with the following columns: "ID", "Rule Set Name", "Type", "Last Executed", and "Last Executed By". The table contains two rows of data:

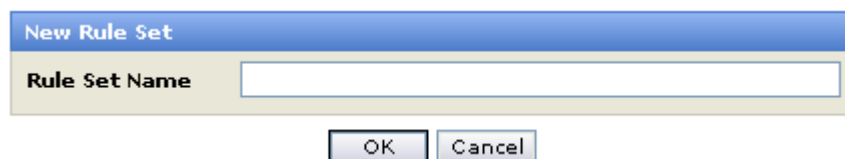
ID	Rule Set Name	Type	Last Executed	Last Executed By
73	Doc2	Recurring		
72	Doc1	Recurring		

Figure 121 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 (go to Current Rule Set on page 89 for more information). In the event the list is extensive, use the search functionality to reduce the list to a manageable size.

6.6.1. 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.



The New Rule Set dialog box has a blue header bar with the text "New Rule Set". Below the header, there is a single input field labeled "Rule Set Name". Below the input field, there are two buttons: "OK" and "Cancel".

Figure 122 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 (go to Current Rule Set on page 89 for more information). Here you set up the rule set properties and add rules.

6.7. Aggregated Variable List

Aggregated Variables are variables specified by the user. 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.

Delete Search New Aggregated Variable				
☐ Name	Created Date	Created By	Updated Date	Updated By
☐ AV1	1/31/2007 8:31:34 AM	usermanual	1/31/2007 8:33:09 AM	usermanual
☐ AV2	1/31/2007 8:33:23 AM	usermanual	1/31/2007 8:33:25 AM	usermanual

Figure 123 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.

6.7.1. How to Create a New Aggregated Variable

- Go to the **Panel Management > Aggregated Variable List** menu command.
The Aggregated Variables window opens.
- Click on the **New Aggregated Variable** button towards the right end of the toolbar.
The New Aggregated Variable dialog opens.

New Aggregated Variable

Name

Cancel

< Back

Next >

Finish

Figure 124 The New Aggregated Variable dialog

- Type a name for the variable into the Name field, then click **Finish**.
The variable is created and added to the Aggregated Variable List, and the variable opens for editing.

Back Save Duplicate

Name AV1

Aggregate Operator Count

Output Field Name

Condition Edit

Expression COUNT(*)

Comment

Created Date 26/08/2008 10:13:23

Created By usermanual

Updated Date 26/08/2008 10:13:29

Updated By usermanual

Figure 125 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:
 - o **Count** – counts the number of rows in the table that satisfy the condition, and outputs the result.
 - o **Avg** – totals the values in the table fields that satisfy the condition, and outputs the average value.
 - o **Min** – examines the values in the table fields that satisfy the condition, and outputs the minimum value.
 - o **Max** – examines the values in the table fields that satisfy the condition, and outputs the maximum value.
 - o **Sum** – totals the values in the table fields that satisfy the condition, and outputs the result.
- **Output Field Name** – specify the field in the 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 (go to Multiple Panelist Editor on page 69 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.
- **Date information** – for information only.

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

6.8. Data

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

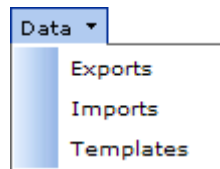


Figure 126 The Panel Management > Data menu

6.8.1. 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 127 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 Confirmit Authoring User Guide for further details on creating expressions.

Otherwise, click **Next**.

The Export Properties page opens.

Figure 128 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:
 - o **Comma** - a Comma (,) -separated ASCII text file is generated. All answers will be inside quotes (""). The variable names will be in the first row.
 - o **Tab** - a Tab-separated ASCII text file is generated. No quotes (") are used. The variable names will be in the first row.
 - o **Custom** - the Custom Delimiter field is activated. Here you can select any single keyboard character, which will then be used as the delimiter in the exported ASCII text file.
- **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.
- **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 129 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 Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys. Refer to the Confirmit 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.

6.8.2. Importing Data

Respondent data can be imported into a Community Panel.

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

The Data Import page opens.

Figure 130 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** (go to Uploading a File on page 101 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 Confirmit's FTP location. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed, so you must add only the file name to this field. Refer to the Confirmit 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.

6.8.2.1. 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 Confirmit Authoring User Guide for further details on uploading files.

6.8.3. Data Templates

You can create data templates for Community 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 Confirmit Authoring User Guide for further information on templates.

6.9. 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.

The screenshot shows a 'Properties' dialog box with the following settings:

- Active Database:** Production
- Respondents:** All
- Status Message:** Variables are calculated for all respondents. This is the slowest calculation, but should be used when variable expressions are changed or interviewing is running and respondents are allowed to change their answers.
- Status:** Complete
- All Variables:** ☒
- Start time:** ASAP
- Buttons:** OK

Figure 131 Calculating the Variables

The fields and options are as follows:

- **Active Database** - the currently selected database. Use the selection box in the lower right corner of the Confirmit window to change this as necessary.
- **Respondents** - choose whether you want to calculate variables for All respondents, Uncalculated respondents, or only New respondents.
- **Status** - choose whether you want to calculate variables for 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.

6.10. Panelist Credits

This menu command enables you to import and export panelist credits (go to Credit Balance on page 54 for more information). The menu contains two options:

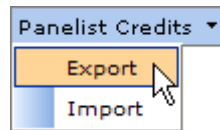


Figure 132 The Panelist Credit menu

6.10.1. How to Export Panelist Credits

This procedure exports the panelist credits for all the panelists in the selected panel. To export panelist credits:

1. Go to the **Panel Management > Panelist Credit** menu command and select **Export**.

The Export Panelist Credits dialog opens.

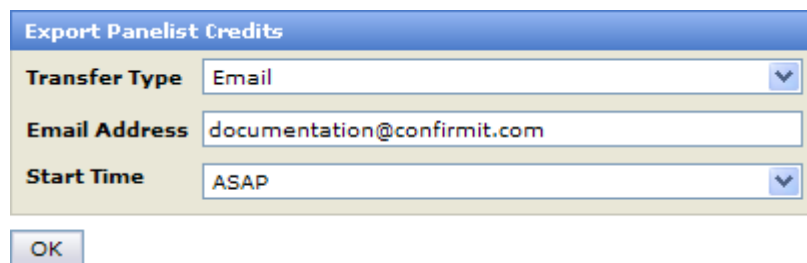


Figure 133 The Export Panelist Credits dialog

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

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

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

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

5. Click **OK**.

The task runs at the specified time, and the panelist credits are exported as a zipped .txt file.

6.10.2. How to Import Panelist Credits

The panelist credits for a panel can be exported as a zipped .txt file, via email, or if you have the appropriate license, via FTP (go to How to Export Panelist Credits on page 103 for more information). Note that there are a number of information columns that must be included in the .txt file to be imported. These are "required fields" and must have the column headers as shown:

Field/column name	Description	Required/Optional
PanelistID	The unique panelist ID of the panelist. Maximum number of characters is 50.	Required
PanelistTransactionID	The ID of the particular credit entry.	Required

SurveyID	The project ID of the project for which the credit is being granted.	Required
Credit	The credit amount.	Required
Created	The date for the credit entry.	Required
Comments	A text string, up to 256 characters.	Optional
SectionID	A string used if credits are to be assigned multiple times for one project. Up to 40 characters.	Optional

If the file has been exported via email, 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 134 The Import Panelist Credits dialog

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

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

4. Select the Key Field that is to be used to identify the panelists to which each credit value is to be credited. This list is populated automatically from the fields available in the panel.
5. Set the start time for the import task.

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

6. Click **OK**.
The import will be performed at the specified time(s).

6.11. The Panel Settings

You can define some custom settings for the panelists' password requirements. These are defined separately for each panel, so different panels can have different password requirements.

Note: 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.

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

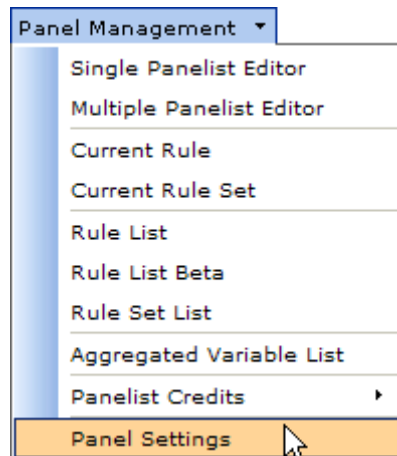


Figure 135 The Panel Management > Panel Settings menu command

The Panel Settings page opens.

 A screenshot of the 'Password' settings page. At the top, there's a 'Save' button with a floppy disk icon. Below it is a yellow information box with a question mark icon and text: 'Specify password validation settings for current panel. These settings will apply for all places where it is possible to change password. E.g. Portals, registration and maintenance surveys.' The main section contains several settings, each with a text input field (all containing '0') and a help icon (question mark in a circle): 'Password expiry days', 'Password history', 'Minimum age', 'Minimum required length', 'Minimum required non alpha characters', 'Minimum required non alpha numeric characters', and 'Minimum required uppercase characters'. The last setting, 'Password similar to username', has a checkbox and a help icon instead of a text field.

Figure 136 The Panel Settings page

The options are as follows:

- **Password expiry days** - specify how many days the password is to be valid after it has been changed. Use 0 to disable this functionality such that the password does not expire.

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

2. When you have made the required changes, click **Save** to save them.

(go to Password Policy on page 5 for more information).

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.

Confirmit's Sample Management function uses the panelists' details in the database and the additional criteria to select the appropriate panelists for a particular survey.

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 Confirmit Sample Management menu, and the procedures required to make use of that functionality.

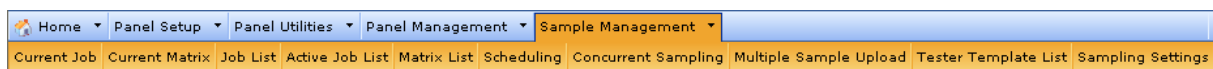


Figure 137 The Confirmit Sample Management menu

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.

The screenshot displays the 'Job Information' tab within a web application. The interface includes a top navigation bar with tabs: Job Information, Exclusions, Filter, Sample Definition, Sample File Fields, Execution, and Reporting. Below the navigation bar is a toolbar with buttons: Save, Duplicate, Export Job, and Validate Job. The main form area contains several sections:

- Job Information:** Fields for Job Number (3), Description (Omnibus), Mailing Date (16/10/2008), and Status (Work In Progress).
- Properties:** Fields for Project Manager (Ole Andresen) and CustomJobStatus (Open).
- Data Source:** A dropdown menu.
- External Fields:** A message 'No external file has been uploaded' with an 'Upload file' link.
- External Survey Links:** A message 'No links have been uploaded' with an 'Upload links' link.
- Category:** A section with 'Available Categories' (a list box containing Panel Categories, AnotherSample, Demo, and SampleType) and 'Selected Categories' (a list box containing Demo). There are search and clear buttons for the available categories, and arrow buttons for moving items between the two lists.

Figure 138 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 Confirmit 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 (go to How to Set the Mailing Date on page 115 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”) (go to The Property Definitions Tab on page 190 for more information). You can then specify the property and option for each job, and these can be used when eliminating panelists for jobs (go to The Auto Job Exclusion Tab on page 112 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 Confirmit and uploaded. The file should be tab-delimited with PanelistId as the key column, followed by the external fields (go to How to Upload a File on page 110 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 Confirmit 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 (go to The Categorization Tree Tab on page 189 for more 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.

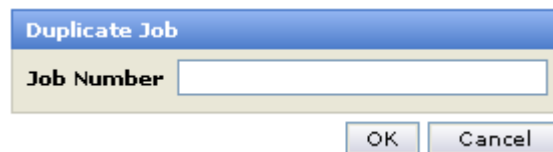


Figure 140 The Job Import dialog box

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

The new job opens in the Confirmit 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.

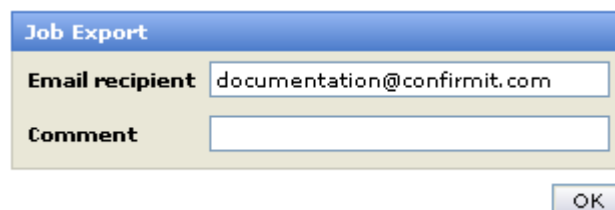


Figure 141 The Job Export dialog box

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 Conformit 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.

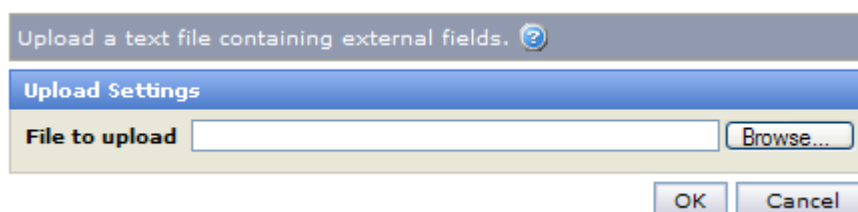


Figure 142 The Upload Settings dialog box

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.

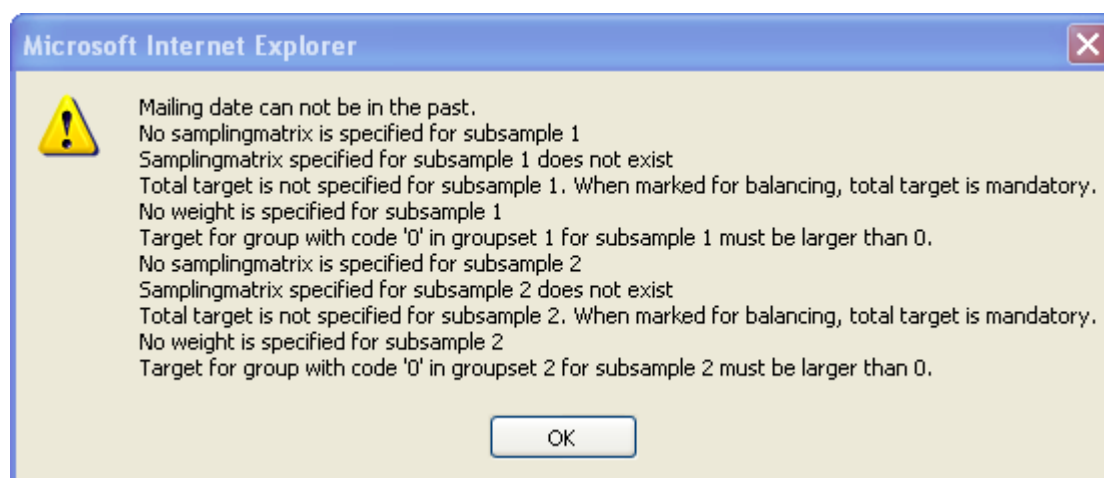


Figure 143 Example of a verification message list

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 144 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**.

Confirmit 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**, Confirmit 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

The Auto Job Exclusion function is controlled by dates. Here you can select the type of exclusion you wish to use; Category and/or Date, 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, and you can exclude based on the project, which prevents panelists being uploaded multiple times.

Job Information Exclusions Filter Sample Definition Sample File Fields Execution Reporting

Auto Job Exclusion Manual Job Exclusion Manual Panelist Exclusion

Save

☐ Exclude All Panelists ?

☒ Specify Auto Exclusion ?

☒ Use Project Exclusion

☒ Category Exclusion ?

Days Before Mailing Date days

Days After Mailing Date days

August 2010							
Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 26	27	28	29	30	31	1	
week 2	3	4	5	6	7	8	
week 9	10	11	12	13	14	15	
week 16	17	18	19	20	21	22	
week 23	24	25	26	27	28	29	
week 30	31	1	2	3	4	5	

Survey Status: All

☒ Date Exclusion ?

Days Before Mailing Date days

Days After Mailing Date days

August 2010							
Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 26	27	28	29	30	31	1	
week 2	3	4	5	6	7	8	
week 9	10	11	12	13	14	15	
week 16	17	18	19	20	21	22	
week 23	24	25	26	27	28	29	
week 30	31	1	2	3	4	5	

Survey Status: All

☒ Property Exclusion: (Complexity) ?

Item Name	Low	Days Before Mailing Date	5	Days After Mailing Date	5	Remove
Item Name	Medium	Days Before Mailing Date	7	Days After Mailing Date	7	Remove
Item Name	High	Days Before Mailing Date	9	Days After Mailing Date	9	Remove

Add

Survey Status: All

Figure 145 The Auto Exclusion tab

The Auto Job Exclusion tab controls three functions:

- **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 (go to How to Set the Mailing Date on page 115 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 (go to The Property Definitions Tab on page 190 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 (go to How to Set the Property Elimination Function on page 118 for more information).

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.
- **Use Project Exclusion** - 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, all panelists that have previously been uploaded to that survey will be excluded. There is then no risk of a panelist being uploaded to the same survey twice.

Or:

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

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 146 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. Confirmit therefore provides you with a set of filters so you can reduce a long list to a manageable size.

Figure 147 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 “Confirmit 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 148 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.

External fields allows you to upload additional information on particular panelists. This information will be in the form of text files (.txt) that must be created outside of Confirmit and uploaded. The file can be uploaded for an individual panelist or for a group of panelists

The file must be tab-delimited with PanelistId as key column, followed by the external fields as shown in the image below.

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

Figure 149 Example of a text file with a list of panelist information

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.

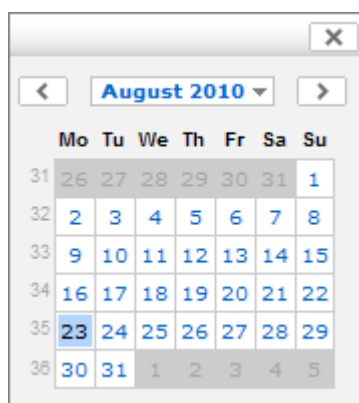


Figure 150 The calendar

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 highlighted in red, and the selected date (if a date is already selected) is outlined. 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.

☒ **Category Exclusion** ?

Days Before Mailing Date days

Days After Mailing Date days

August 2008

Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 28	28	29	30	31	1	2	3
week 4	4	5	6	7	8	9	10
week 11	11	12	13	14	15	16	17
week 18	18	19	20	21	22	23	24
week 25	25	26	27	28	29	30	31
week 1	1	2	3	4	5	6	7

Survey Status

All ▼

Figure 151 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:

- o **Reserved** – excludes all potential panelists who are already reserved for other projects in the specified categories and date range.
- o **Invited** – excludes potential panelists if an invitation has been sent to them to participate in a survey in one of the specified categories.
- o **In Progress** – excludes potential panelists if they are in progress with a survey of the specified categories.
- o **Completed** – excludes all potential panelists who have completed a survey in the specified categories within the specified date range.
- o **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 stopped from completing those surveys by Confirmit.
- o **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 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.

☒ **Date Exclusion** ?

Days Before Mailing Date days

Days After Mailing Date days

August 2008

Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
week 28	28	29	30	31	1	2	3
week 4	4	5	6	7	8	9	10
week 11	11	12	13	14	15	16	17
week 18	18	19	20	21	22	23	24
week 25	25	26	27	28	29	30	31
week 1	1	2	3	4	5	6	7

Survey Status

All

Figure 152 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:

- o **Reserved** – eliminates all potential panelists who are already reserved for other projects in the specified date range.
- o **Invited** – eliminates potential panelists if an invitation has been sent to them to participate in a survey within the specified date range.
- o **In Progress** – eliminates potential panelists if they are in progress with a survey within the specified date range.
- o **Completed** – eliminates all potential panelists who have completed a survey within the specified date range.
- o **Stopped by System** – eliminates 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 Confirmit.
- o **All** – eliminates all potential panelists who have been invited to participate in any survey during the specified period.

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

7.1.2.4.5. How to Set the Property Elimination 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 (go to The Property Definitions Tab on page 190 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.

General Categorization Tree Property Definitions Output Field Templates Survey Rule Templates						
✕ Delete New Property Definition						
Name	Id	Required	Show in Joblist	Use Output Template	Survey Rule Template	Has Survey History Support
Complexity	Complexity	-	-	✓	✓	✓
Duration	Test	✓	-	-	-	-

Figure 153 Example of the Property Definitions list

- 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.

General Categorization Tree Property Definitions Output Field Templates Survey Rule Templates						
Back Save and Close Save						
Property Name: Complexity Property ID: Complexity ☐ Is Required ☐ Show in Joblist ☒ Use Output Template ☒ Use Survey Rule Template ☒ Has Survey History Support ☒ Use in Exclusion						
Property Item List						
✕ Remove ➕ Add						
Id	Name	Defau...	Auto...	Output Template	Survey Rule Template	
1	Low	☐	☒			
2	Medium	☐	☐			
3	High	☐	☐			

Figure 154 Example of the Definition page for a property

- 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.

- Click **Save and close**.
- Go to the **Sample Management > Current Job** menu command, then go to the **Exclusions** tab.
- 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).

- Click **Add**.

A row is added to the exclusion list as shown in the example below.

☒ **Property Exclusion: (Complexity)**

Item Name

Add

Low

Medium

High

Days Before Mailing Date

5

Days After Mailing Date

5

Remove

Figure 155 Example of the Property Elimination list

- 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 elimination 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.

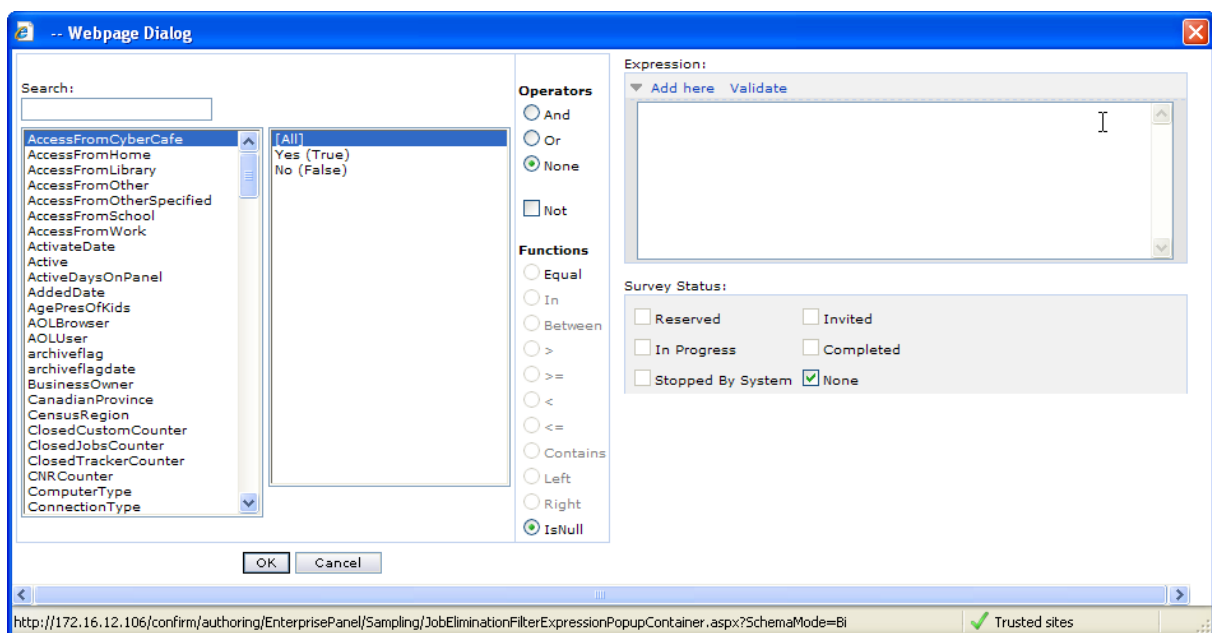


Figure 156 The Filters Web Page dialog

8. Create an expression as necessary (go to The Filter Tab on page 121 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.

The screenshot shows the 'Filter' tab in the Confirmit 15 Community Panels User Guide. The interface includes a 'Save' button, a 'Create the background panelist-selection expression' instruction, a 'Search' field, a list of 'Operators' (And, Or, None, Not), a list of 'Functions' (Equal, In, Between, >, >=, <, <=, Contains, Left, Right, IsNull), and a 'Universal Criteria' section with an 'Add here' button and a list of criteria.

Figure 157 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, Confirmit reduces the criteria list to show only those criteria that include that character or series somewhere in the criteria name.
- The Operators:
 - o **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.
 - o **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.
 - o **None** – this is not a conjunction operator. Use when adding the first criteria in the expression.
 - o **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):
 - o **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.
 - o **In** – use when the criteria value is to be one of a range or set of values.
 - o **Between** – use when you want the criteria to be between two values, for example between two dates.
 - o **>** (Greater than) - use when the criteria is to be greater than a specified value.
 - o **>=** (Greater than or equal to) - use when the criteria is to be greater than or equal to a specified value.
 - o **<** (Less than) – use when the criteria is to be less than a specified value.
 - o **<=** (Less than or equal to) – use when the criteria is to be less than or equal to a specified value.
 - o **Contains** – you can write an expression that looks, for example, for a certain combination of four characters anywhere in a line of text.
 - o **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.
 - o **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.

- o **IsNull** - you can write an expression that looks for any null-precodes in multi questions; i.e. answer options that have not been selected.
- o **Any** - you can write an expression that looks for instances where any of a specified set of precodes are present.
- o **All** - you can write an expression that looks for any instances where all of a specified set of precodes are present.
- Other data fields
 - o **Text area** – type text as required into this field. The field is only accessible for certain pre-defined criteria.
 - o **Paste area** – here you can paste in, for example, a list of values copied from a document.
 - o **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.
 - o **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 Confirmit 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.

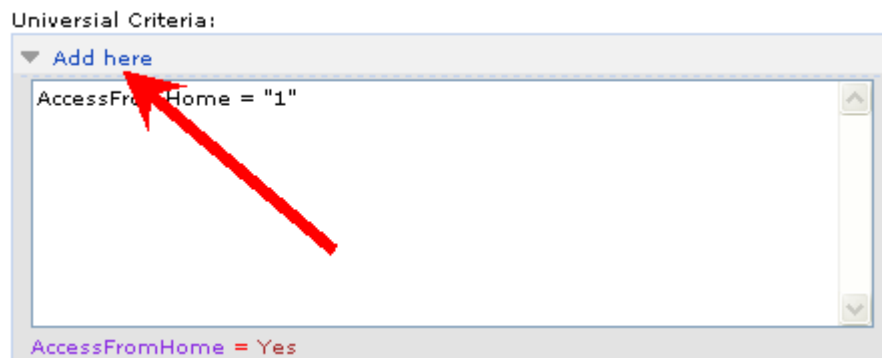


Figure 158 Adding criteria to the data field

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.

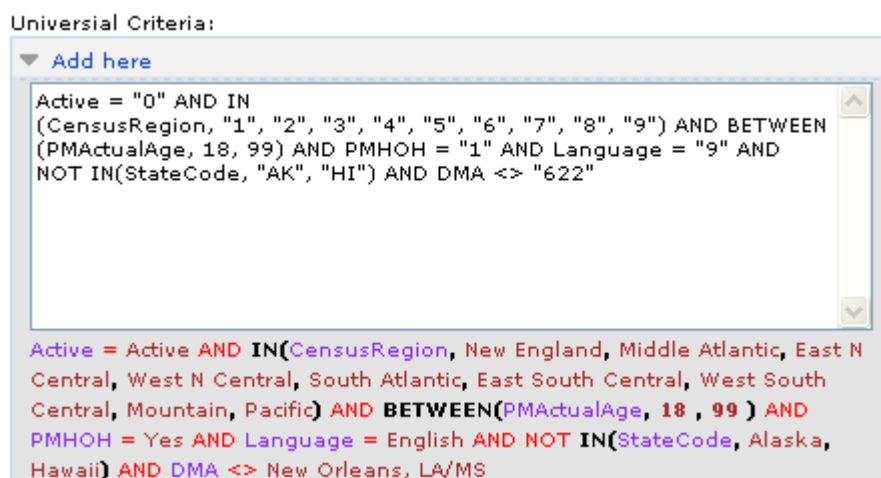


Figure 159 Example of a complete expression

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 (go to The Right-Click Menu on page 124 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.

Matrix List	
☐ Name	
☐ Matrix1	

Custom Code	
☐ Name	
☐ CustomCode1	
☐ CustomCode2	

Global Custom Code	
☐ Name	Value
☐ Global1	8888

Figure 160 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. (go to The Filter Tab on page 121 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 (go to The Sub Sample Editor Page on page 125 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 (go to The Sub Sample Editor Page on page 125 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 161 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 (go to The Sub Samples Folder Editor Page on page 125 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 (go to The Sub Samples Folder Editor Page on page 125 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 (go to How to Create an Expression on page 123 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. Confirmit will attempt to fill this requirement while adhering to the selection criteria set in this and the other tabs.

Note: Confirmit 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 Confirmit 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 Confirmit 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 (go to Adding a Custom Code on page 128 for more information), then it will appear here. Add a value as required.
- **Weight Parameter** – this property is only used during concurrent sampling (go to Concurrent Sampling on page 182 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 (go to The General Tab on page 187 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.

Percent	Target	Code	CustomCode1	CustomCode2
☒	20	0	67	68

Figure 162 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 (go to How to Create an Expression on page 123 for more information).
- **Custom code field(s)** - these are created in the Custom Code field in the Sub Samples editing page (go to The Sub Samples Folder Editor Page on page 125 for more information).
- **Group List** - the list of groups in the Group Set. Click **Add Group** to create new groups (go to How to Create a New Group Set on page 129 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 (go to The Sub Samples Folder Editor Page on page 125 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 (go to The Sub Sample Editor Page on page 125 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 output 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 (go to How to Create a New Rule on page 93 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 163 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 164 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.

Generate Groups
Generate Groups

Generate Close

Number of Groups 5

Group Start Code 10

Group Increment 5

Percent ☐

Target 200

Figure 165 Example of the Generate Groups window

4. Fill in the details. The fields are as follows:
 - o **Number of Groups** – the number of groups you wish to create in this operation.
 - o **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.
 - o **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.
 - o **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.
 - o **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.

Save

Remove Group

Generate Group

Group Set Name

Group Set 2/1

Expression

...

Group List

Move Up

Move Down

☐	Percent	Target	Code
☐	☐	200	10
☐	☐	200	15
☐	☐	200	20
☐	☐	200	25
☐	☐	200	30

Figure 166 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.

The screenshot shows the 'Sample File Fields' window with two main panels: 'Available Fields' on the left and 'Selected Fields (Template: Template1_PJ)' on the right. The 'Available Fields' panel has a search bar, 'Add', 'Add All', and 'View' buttons, and a dropdown menu set to 'Panel Fields'. It lists 32 fields with checkboxes; 4 are selected (address_city, age, appliances, booked). The 'Selected Fields' panel has a search bar, 'Remove', 'Remove All', and 'View' buttons, and a dropdown menu set to 'All Fields'. It lists the same 32 fields with checkboxes; 32 are selected. Both panels have a 'Field Name' and 'Field Type' header. The 'Field Type' column shows various types like 'Template' and 'System'. At the bottom, it says '4 of 50 selected.' and '0 of 32 selected.' with 'Page 1' indicators.

Figure 167 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.

The screenshot shows the toolbar for the 'Sample File Fields' tab. It has two main sections: 'Available Fields' on the left and 'Selected Fields (Template: Template1_PJ)' on the right. The 'Available Fields' section has a search bar, 'Add', 'Add All', and 'View' buttons, and a dropdown menu set to 'Panel Fields'. The 'Selected Fields' section has a search bar, 'Remove', 'Remove All', and 'View' buttons, and a dropdown menu set to 'All Fields'. Both sections have a 'Field Name' and 'Field Type' header. The 'Field Type' column shows various types like 'Template' and 'System'.

Figure 168 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 (go to How to Upload a File on page 110 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.
Confirmit 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**, Confirmit 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.

The screenshot displays the 'Execution' tab in the Confirmit 15 Community Panels User Guide. The tab is divided into two main sections: 'Job Execution' and 'Job Runs'.

Job Execution Section:

- Job Status:** Approved
- Mailing Date:** 01 September 2010
- Preapproved:** ☒
- Disregard in Future Date Exclusions:** ☐
- Incidence Rate (%):** 100
- Completion Rate (%):** 100
- Preview Target(s):** (link)

Job Runs Section:

Buttons: Rebuild Sample File, Remove Run From Panel, Upload, Change Mailing Date, Sample File Preview, Add Test Panelists, Export Sample File, Generate Sample Fill-In

Run	Created	Created By	Mailing date	Panel Updated	Uploaded	Status	Outgo/Exp. Return	Actual Return	Augment Of
1	01/09/2010	olea_pros	01/09/2010	Yes	No	Approved	501		

Figure 169 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 output file into a project (go to How to Upload the Output File on page 146 for more information).
- "Undo" the sampling operation and return to sample to the panel (go to How to Remove a Run from the Panel on page 144 for more information).
- Change the mailing date (go to How to Change the Panel Mailing Date on page 147 for more information).
- View a snapshot of the panelists in the sample (go to After the Job has been Executed on page 144 for more information).
- Add test recipients (Tester Templates) (go to Tester Template List on page 185 for more information).
- Export the sample file (go to How to Export the Sample File on page 148 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 (go to How to Generate Sample Fill-in on page 144 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 (go to After the Job has been Executed on page 144 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 (go to How to Remove a Job from the Panel on page 145 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 (go to How to Remove a Run from the Panel on page 144 for more information).
- **Preapproved** – Confirmit 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 Eliminations** – 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 output 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 output 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 (go to How to Remove a Run from the Panel on page 144 for more information).
- **Upload** - click to upload the sample file to a project (go to How to Upload the Output File on page 146 for more information).
- **Change Mailing Date** - change the mailing date for the project (go to How to Change the Panel Mailing Date on page 147 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 (go to How to Add Test Panelists to the Database on page 148 for more information).
- **Export Sample File** - once you have created the sample file you can export it to another server or project (go to How to Export the Sample File on page 148 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 an output 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 170 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. Confirmit 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 Output File** – ensure this box is checked if you require the output file (the list of panelists reserved for the job) to be created. Note that you cannot Upload the sample if the output file is not created.

Note: If you select to create the output file but not to update the panel database, then Confirmit 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.
- **Upload Sample** - check this box if you wish to upload the resulting output 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 (go to The Upload Sample Properties Page on page 140 for more information).
 - o **Existing Project** - select this option if you wish to upload the output file to an existing project.

- o **New Project** - select this option if you wish to upload the output 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:
 - 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 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 (go to The Upload Sample Properties Page on page 140 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.

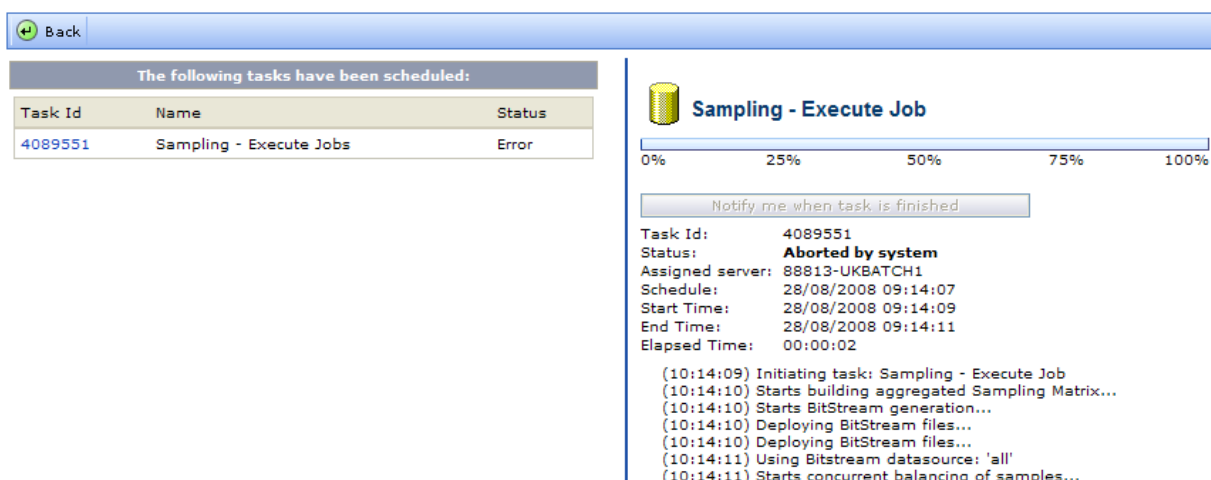


Figure 171 Example of the Execute Job task information page

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 output file has been created, you can upload the file into a Confirmit project. In this case, an **Upload** button appears in the Job Runs (lower) section on the Execution tab (go to How to Upload the Output File on page 146 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 Confirmit 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. Confirmit 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 172 The Recurrence tab

The options are as follows:

- o **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.
- o **ASAP** – select this radio button and click **Save** to run the task as soon as possible.
- o **Time and date fields** – set a time and date for when the task is to run, then click **Save**.
- o **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 173 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 (go to How to Set the Execution Time/Date for a Job on page 137 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.

The dialog box has four tabs: Definition, Recurrence (selected), Parameters, and Instances. The 'Recurrence' tab contains the following fields:

- New Start Time:** Three radio buttons. The first is 'Disable task (clear queue)'. The second is 'ASAP'. The third is selected and shows '12:00' and '06/02/2008'.
- Recurring Task:** A dropdown menu set to 'Yes'.
- End By:** A date field set to '31/12/2008'.
- Recurrence pattern type:** A dropdown menu set to 'Monthly'.
- Monthly schedule:** A field showing 'Day 0 of every 0 month(s)'.

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Figure 174 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:

- o For hourly recurrences, type in the rate. For example, if you want the job to be executed every 4 hours, type **4** into the box. The job will be first executed at the date and time set in the New Start Time fields, then will be repeated every four hours.
 - o For daily recurrences, type in the rate. For example, if you want the job to be executed every 3rd day, type **3** into the box. The job will be first executed at the date and time selected in the New Start Time fields, and will be repeated every third day.
 - o For weekly recurrences, type in the rate and select the days of the week on which you want the job to be executed. For example, if you type **2** into the first box and click in the **Monday** and **Friday** boxes to select them, the job will be executed every second week; the first time on the Monday, the next time on the Friday, the next time on the Monday and so on.
 - o For monthly recurrences, type in the day of the month and the rate. For example, if you want the job to be executed on the 10th day of every second month, type **10** into the Day box and **2** into the Month box.
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.

The screenshot shows a dialog box with four tabs: Definition, Recurrence (selected), Parameters, and Instances. Below the tabs, a message states 'Recurrence parameters saved'. The 'Current Settings' section displays: Initial Start Time: 06/02/2008 12:00:00, Pattern: Monthly, Interval: Every 1 month(s), and Range: 31/12/2008. The 'Next scheduled occurrences' section lists five dates: 06/02/2008 12:00:00, 01/03/2008 12:00:00, 01/04/2008 12:00:00, 01/05/2008 12:00:00, and 01/06/2008 12:00:00. A 'Change' button is located at the bottom.

Figure 175 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**(go to How to Change the Execution Settings on page 143 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 (go to How to Execute a Job on page 135 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.

The screenshot shows the 'Upload Sample Properties' dialog box. At the top, a yellow note states: 'Note! Text variables longer than 255 characters will be automatically truncated upon upload to the survey.' The dialog has several sections: 'Project Id' with a text field and a 'Select project' button; 'Comment' with a text field; 'Test Database' with a checkbox; 'Email Sample' with a checkbox and fields for Email (dropdown), Mailing Date (31/10/2008), Mailing Time (00:00 dropdown), Number of Batches (1), and Hours Between Batches (0); 'Email Reminder' with a checkbox and fields for Email Reminder (dropdown) and Days to Reminder (text field); and 'Override for Sub Samples' with a checkbox and a large text area. At the bottom are buttons for 'Cancel', '< Back', 'Next >', and 'Finish'.

Figure 176 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.

The screenshot shows the 'Upload Sample Properties' form. At the top, there's a blue header bar with the title. Below it, the 'Project Id' field contains 'p0991725' and a 'Select project' button is to its right. The 'Comment' field contains 'Test run 1'. The 'Test Database' checkbox is checked. Below this, there are two main sections: 'Email Sample' and 'Email Reminder', both with checked checkboxes. The 'Email Sample' section includes fields for 'Email' (dropdown with 'e1'), 'Mail Date' (19/01/2008), 'Mailing Time' (dropdown with 00:00), 'Number of Batches' (1), and 'Hours Between Batches' (0). The 'Email Reminder' section includes 'Email Reminder' (dropdown with 'e1') and 'Days to Reminder' (empty field). At the bottom, there's an 'Override for Sub Samples' section with a table containing 'Sub Sample Name', 'Email', and 'Reminder Email' columns. The table has one row with 'new sub sample', 'Default', and 'Default'. At the very bottom of the form are navigation buttons: 'Cancel', '< Back', 'Next >', and 'Finish'.

Figure 177 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.
 - **Mail Date** - the date on which the email is to be sent (go to How to Set the Mailing Date on page 115 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 (go to The Augment Sample Properties Page on page 142 for more information).

7.1.6.3.5. The Augment Sample Properties Page

When you click **Next** on the Upload Sample Properties page (go to The Upload Sample Properties Page on page 140 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 responses to your questionnaire. If for example you need 1000 responses, 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 responses. You can therefore set up the Augment functionality to create after a specified period additional samples such that you will receive the desired total of 1000 responses.

The Augment functionality will wait a specified period (Days to First Augment) after the initial mailing date, and then count the number of responses 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 responses. 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 responses is received or the specified number of augments is performed.

Figure 178 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: $\text{New Total Target} = (\text{Total Target} - \text{Actual Return}) * \text{New Target Factor}$
- **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:

$\text{New Total Target} = (\text{Target for Calculation Diff} - \text{Actual Return}) * \text{New Target Factor}.$

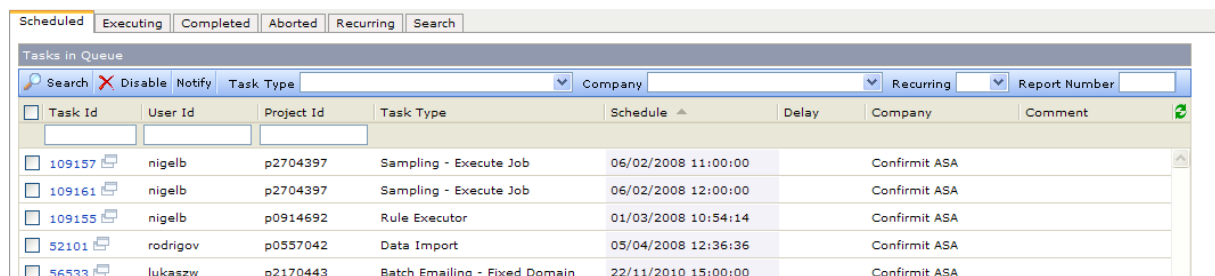
7.1.6.3.6. How to Change the Execution Settings

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 (go to The Project Tasks Page on page 24 for more information).



Task Id	User Id	Project Id	Task Type	Schedule	Delay	Company	Comment
109157	nigelb	p2704397	Sampling - Execute Job	06/02/2008 11:00:00		Confirmit ASA	
109161	nigelb	p2704397	Sampling - Execute Job	06/02/2008 12:00:00		Confirmit ASA	
109155	nigelb	p0914692	Rule Executor	01/03/2008 10:54:14		Confirmit ASA	
52101	rodrigo	p0557042	Data Import	05/04/2008 12:36:36		Confirmit ASA	
56533	lukasz	p2170443	Batch Emailing - Fixed Domain	22/11/2010 15:00:00		Confirmit ASA	

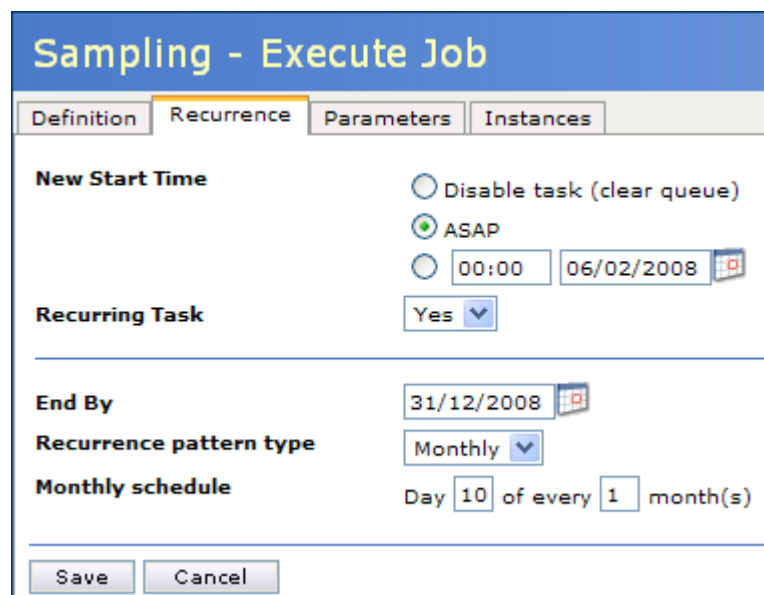
Figure 179 Example of a Task List

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.



Sampling - Execute Job

- Definition
- Recurrence**
- Parameters
- Instances

New Start Time

☐ Disable task (clear queue)
☒ ASAP
☐ 00:00 06/02/2008

Recurring Task

Yes

End By

31/12/2008

Recurrence pattern type

Monthly

Monthly schedule

Day 10 of every 1 month(s)

Save Cancel

Figure 180 The Execute Job > Recurrence tab ready for changing

Here you can make the required changes to the job (go to How to Change the Job Schedule Settings on page 181 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.

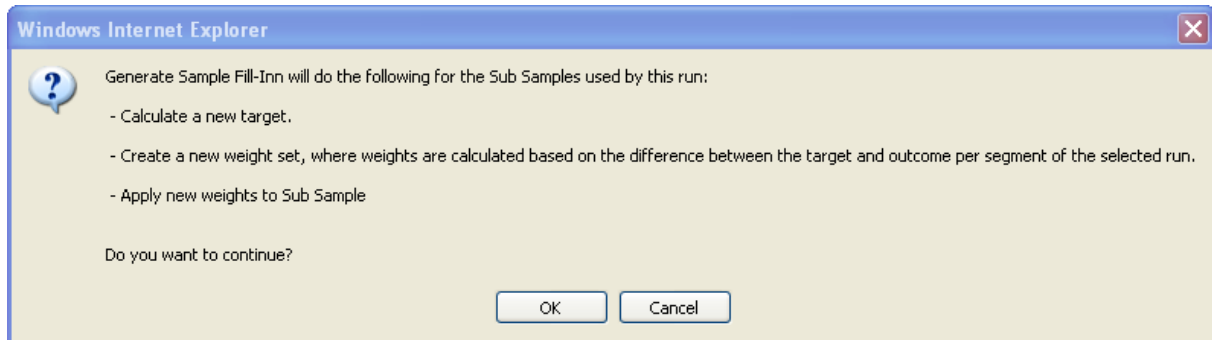


Figure 181 The confirmation window

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 (go to How to Abort Execution of a Sampling Job on page 181 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 (go to The Job Runs Area on page 135 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 (go to The Reporting Tab on page 150 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** (go to How to Remove a Job from the Panel on page 145 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 182 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 (go to How to Remove a Run from the Panel on page 144 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 183 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:
 - o **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.
 - 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.

7.1.6.4.3. How to Upload the Output File

Once you have created the required sample file, if it is not uploaded to the project automatically when it is created (go to The Upload Sample Properties Page on page 140 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 184 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** (go to How to Set the Execution Time/Date for a Job on page 137 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 185 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 Conformit Authoring User Guide for further information on survey creation.

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 186 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 (go to Tester Template List on page 185 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.

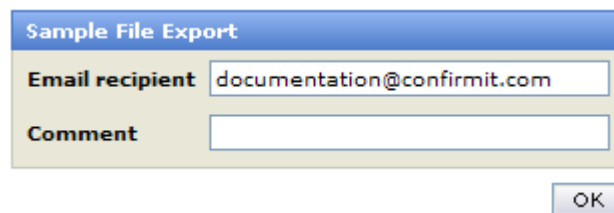


Figure 187 The Sample File Export dialog

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.

Task definition properties	
Properties	Recurr
Task type	 Sampling - Execute Job
ID	1030
Owner	nigelb
Company ID	1
Project ID	p0220548
Comment	
Command line	Firmglobal.Confirmat.Tasks.Sampling
Save	

Figure 188 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.

Instances	
Properties	Recurr
Schedule	Status
2007-10-24 14:00:00	 In queue

Figure 189 Example of the Instances tab

- **Parameters** – is for information only.

Task definition parameters	
Properties	Recurr
Jobids	243326,243324
Pulltoexpectedreturns	False
Tasktype	Firmglobal.Confirmat.Tasks.Sampling.ExecuteJobs
Runasap	False
Projectid	p0220548

Figure 190 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.

7.1.7. The Reporting Tab

This tab lists the jobs that have been executed, and provides access to the reports for those jobs.

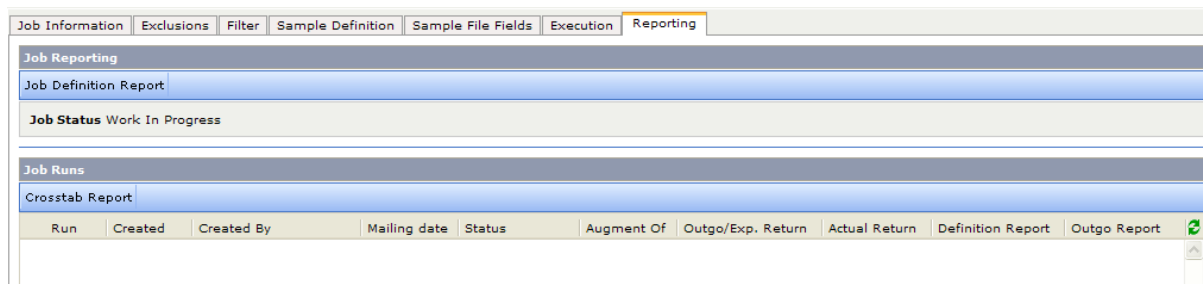


Figure 191 Example of the Reporting tab

The tab contains two main areas:

- **The Job Reporting area** - provides access to the current Job Definition Report and status (go to The Job Reporting Area on page 150 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 (go to The Job Runs Area on page 152 for more information).

7.1.7.1. The Job Reporting Area

The Job Reporting area is in the upper part of the Reporting tab.

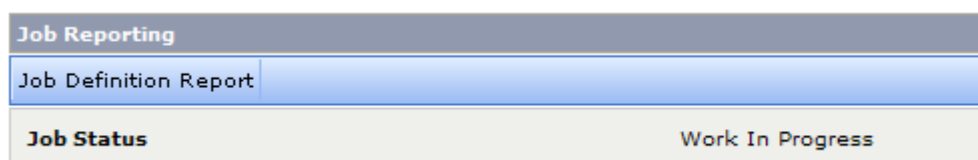


Figure 192 The Job Reporting area on the Reporting tab

The area displays the current status for the job. Note that the job status is changed automatically by Confirmit 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.

[Back](#)
[Printer Friendly Version](#)

Job Number:	Jobben
Job Description:	
Data Source	Kajskk
Mail Date	19/01/2008
Date Created:	04/12/2007
Created By:	erikb
Date Modified:	14/01/2008
Modified By:	nigelb

General Information

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 PMOH = 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
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SubSamples Information

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 193 Example of a Job Definition Report

The Job Definition Report report contains three sections:

- **Job Details** – the job number, status etc (go to The Job Details Area on page 151 for more information).
- **General Information** – the job categories, the expression and exclusions used, and the additional items selected (go to The General Information Area on page 151 for more information).
- **Sub Sample Information** – details of the sub samples defined (go to The SubSamples Information Area on page 152 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..

Job Number:	12345
Job Description:	Trial
Data Source	all
Mailing Date	29/08/2008
Date Created:	22/08/2008
Created By:	usermanual
Date Modified:	28/08/2008
Modified By:	usermanual

Figure 194 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, eliminations, 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.

General Information				
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(PMAActualAge, 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

Figure 195 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.

SubSamples Information							
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 196 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.

Job Runs										
Crosstab Report		Crosstab Report Excel								
Run	Created	Created By	Mailing date	Status	Augment Of	Outgo/Exp. Return	Actual Return	Definition Report	Outgo Report	
2	29/08/2008	nigelb_pros	05/09/2008	Work In Progress		0		[View]	[HTML] [Excel]	
1	15/05/2008	johana_admin	15/05/2008	Production		31		[View]	[HTML] [Excel]	

Figure 197 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 (go to The Crosstab Report on page 153 for more information).
- **Definition Report** - specifies the job definition at the moment the run was executed (go to The Definition Report on page 154 for more information).

- **Outgo Report** - provides the outgo report in HTML (go to The Outgo Report HTML on page 155 for more information) and Excel format (go to The Outgo Report Excel on page 156 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 198 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.
 - o **Count** – shows the actual number of responses per series.
 - o **Horizontal Percent** – the results calculated as a percentage, where the columns add up to 100% “horizontally” in the table.
 - o **Vertical Percent** – the results calculated as a percentage, where the columns add up to 100% “vertically” in the table.
 - o 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
Back to top			
2 (Language --- GroupNumber)			
	Group Number		Total
	0		
English	0		5
French	0		0
German	0		0
Italian	0		0
Spanish	0		0
Total	0		5
Back to top			

Figure 199 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 (go to The Job Reporting Area on page 150 for more information).

Back

Run Number	5
Job Number:	Jobben
Job Description:	
Data Source	Kajak
Mail Date	19/01/2008
Date Created:	10/01/2008
Created By:	nigelb
Date Modified:	10/01/2008
Modified By:	nigelb

General Information

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(PMAActualAge, 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 Information

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 200 Example of a Definition Report

The Definition Report report comprises three areas:

- **Job Details** – the job number, status etc (go to The Job Details Area on page 151 for more information).
- **General Information** – the job categories, the expression and exclusions used, and the additional items selected (go to The General Information Area on page 151 for more information).
- **Sub Sample Information** – details of the sub samples defined (go to The SubSamples Information Area on page 152 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 201 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	N
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	Group995	Total	Group0	Group0	Group999				
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 %				
20														

Figure 202 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 Confirmit 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.

General
Dimensions
Weights
Report

Save
Duplicate
Export Matrix
Validate Matrix

Matrix Name
AgeGender

Data Source

Created By
nigelb

Created Date
23/08/2010 09:24:05

Modified By
nigelb

Modified Date
23/08/2010 09:24:05

Last Accessed

Last Job Used

Last Used

Figure 203 The Current Matrix > General tab

The tab's toolbar contains four buttons:

- **Save** – saves changes. The button flashes while Confirmit 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.

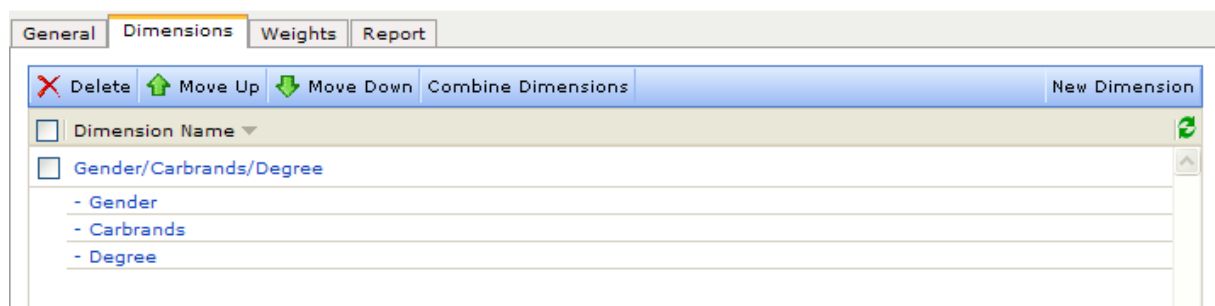


Figure 204 Example of the Dimensions tab list

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 205 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 Confirmit 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 (go to How to Uncombine a Dimension on page 171 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:
 - o **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 (go to Nominal Collapsing on page 160 for more information).
 - o **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 (go to Ordinal Collapsing on page 160 for more information).
 - o **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 (go to Non-Collapsing Adjust Targets on page 161 for more information).
 - o **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 (go to Non-Collapsing Keep Targets on page 161 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 (go to Combined Dimensions on page 169 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 206 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 207 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 208 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 209 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.

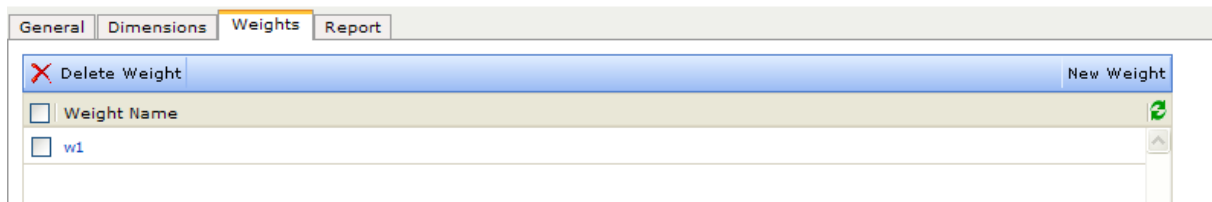


Figure 210 Example of the Weights tab Weight List

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.

General
Dimensions
Weights
Report

Save
Back to Weight List
Duplicate

Weight Name: w1

Dimension: All Dimensions

Dimension Name	Segment Name	Target
Degree		Copy Paste
	Bachelor	30 %
	Master	20 %
	Doctor/Phd	30 %
	Other degree	10 %
	No degree	10 %
	Total	100 %
Gender		Copy Paste
	Male	45 %
	Female	55 %
	Total	100 %
Carbrands		Copy Paste
	SAAB	10 %
	Volvo	10 %
	BMW	10 %
	Audi	10 %
	Mercedes	10 %
	Opel	10 %
	Ford	10 %
	Chrysler	10 %
	Toyota	10 %
	Honda	10 %
	Mazda	0 %
	Total	100 %

Figure 211 Example of a Weight Details page

The toolbar buttons and data fields are:

- **Save** – saves changes for the tab. The button flashes while Confirmit 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 (go to How to Create a Weight Set on page 167 for more information).

7.2.4. The Report Tab

This tab shows details of the dimensions and weights used in the current matrix.

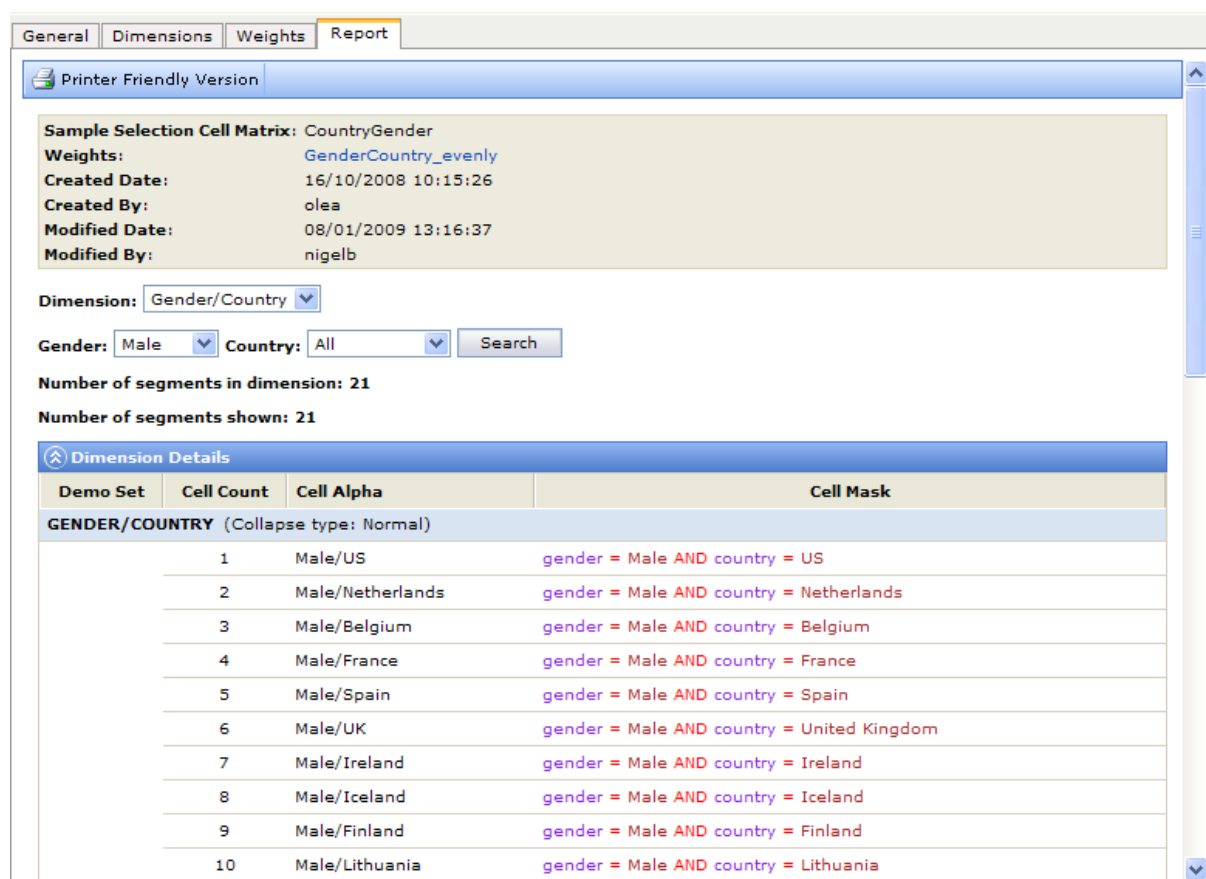


Figure 212 Example of the Report tab

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 (go to The Dimensions Tab on page 158 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.
Confirmit checks the matrix and presents a result message as appropriate.



Figure 213 Example of a matrix validation error message

If the matrix is found to be correctly constructed and is approved, the following message is displayed.

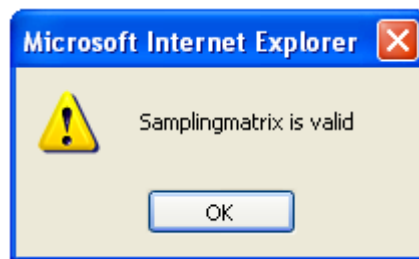


Figure 214 The "matrix is valid" message.

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.

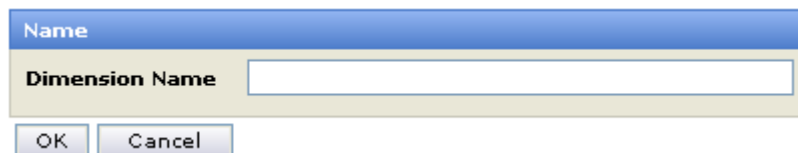


Figure 215 The Dimension name dialog

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 216 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.

The screenshot shows the 'Dimensions' tab in the Conformit 15 Community Panels User Guide. The 'Dimension name' is 'Age' and the 'Collapse type' is 'Nominal collapsing'. The 'Define new Segment' section shows a list of variables on the left and a list of age groups on the right. The 'Segments in Dimension' section shows a list of segments, including 'IN(age_groups, 3, 4, 5)' and 'IN(age_groups, 20-24, 25-34, 35-44)'.

Figure 217 Example of segments in a dimension

8. Save the changes.

Note: If the dimension you are working with is part of a Combined dimension (go to Combined Dimensions on page 169 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 (go to The Dimensions Tab on page 158 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.

The screenshot shows the 'Weight Name' dialog box. It has a 'Name' field and 'OK' and 'Cancel' buttons.

Figure 218 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.

Dimension Name	Segment Name	Target
PMGender		Copy Paste
	Male	0 %
	Female	0 %
	Total	0 %
HHSize		Copy Paste
	1 MEM	0 %
	2 MEM	0 %
	3-4 MEM	0 %
	5+ MEM	0 %
	Total	0 %
PM Education		Copy Paste

Figure 219 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

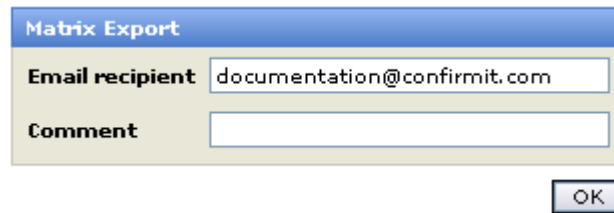
To delete unnecessary weight sets:

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.



The dialog box is titled "Matrix Export". It contains two input fields: "Email recipient" with the value "documentation@confirmit.com" and "Comment" which is empty. Below the fields is an "OK" button.

Figure 220 The Matrix Export dialog

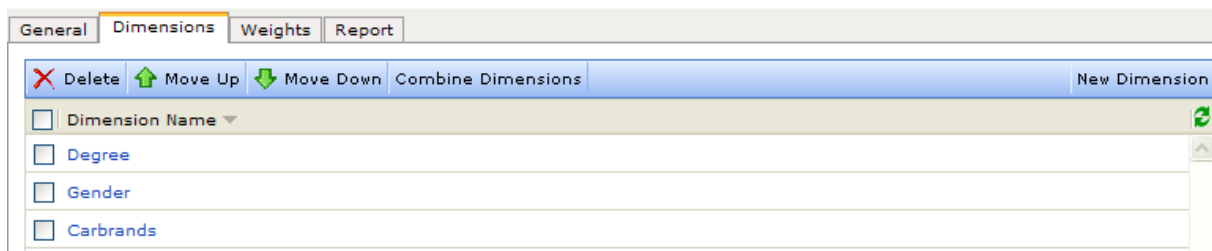
2. The default email address is that of the current user. Change as necessary.
3. Type any comments into the Comment field.
4. Click **OK**.

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 (go to How to Import a Matrix on page 178 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.

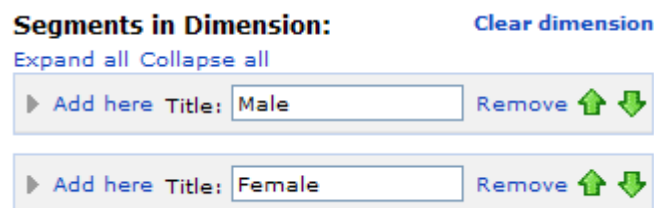
The figure below shows a dimensions list with three separate dimensions.



The interface shows a tabbed view with "General", "Dimensions", "Weights", and "Report". The "Dimensions" tab is active. It features a toolbar with "Delete", "Move Up", "Move Down", "Combine Dimensions", and "New Dimension". Below the toolbar is a list of dimensions: "Degree", "Gender", and "Carbrands". Each dimension has a checkbox and a small green icon.

Figure 221 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).



The interface shows "Segments in Dimension:" with a "Clear dimension" link. Below are "Expand all" and "Collapse all" links. There are two segments: "Male" and "Female". Each segment has an "Add here" button, a "Title" field, a "Remove" button, and up/down arrows.

Figure 222 The segments in the Gender dimension

And each segment can have a specified weight (go to The Weights Tab on page 161 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.

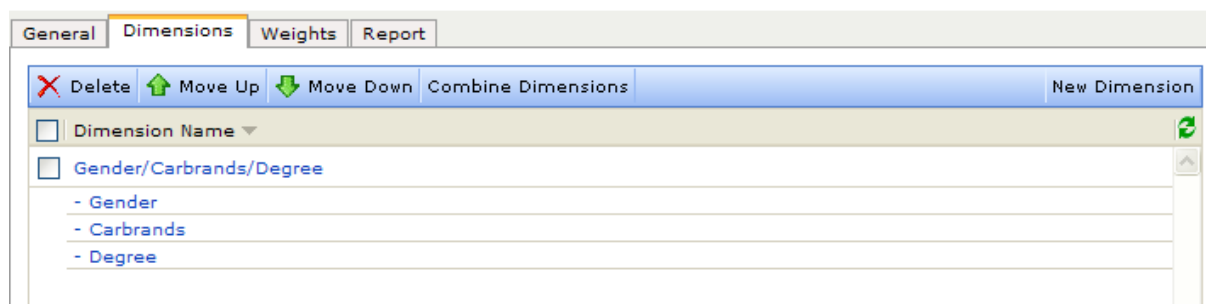


Figure 223 Example of three dimensions combined into one

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.

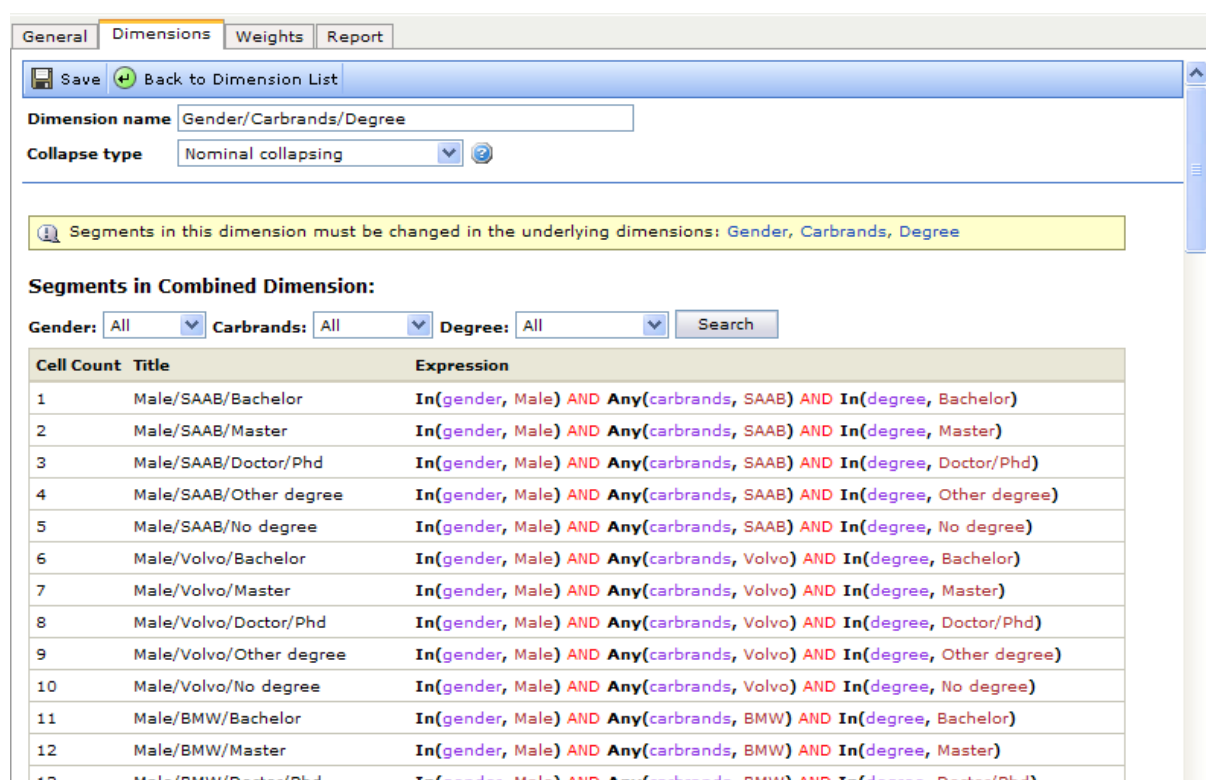


Figure 224 A small part of the segment list for a combined dimension. This list contained 110 cells

Go to the Weights tab and click on a **Weight Name** link to open the Weight list for the combined dimension.

Dimension Name	Segment Name	Target
Gender/Carbrands/Degree	Male/SAAB/Bachelor	1.35 %
	Male/SAAB/Master	0.9 %
	Male/SAAB/Doctor/Phd	1.35 %
	Male/SAAB/Other degree	0.45 %
	Male/SAAB/No degree	0.45 %
	Male/Volvo/Bachelor	1.35 %
	Male/Volvo/Master	0.9 %
	Male/Volvo/Doctor/Phd	1.35 %
	Male/Volvo/Other degree	0.45 %
	Male/Volvo/No degree	0.45 %
	Male/BMW/Bachelor	1.35 %
	Male/BMW/Master	0.9 %
	Male/BMW/Doctor/Phd	1.35 %

Figure 225 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 (go to [How to Uncombine a Dimension](#) on page 171 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.

Weights

Save Back to Weight List Duplicate

Weight Name:

Dimension:

Targets		
Dimension Name	Segment Name	Target
Gender		45 %
	Male	45 %
	Female	55 %
	Total	100 %
Carbrands/ Degree		3 %
	SAAB/Bachelor	2 %
	SAAB/Master	3 %
	SAAB/Doctor/Phd	1 %
	SAAB/Other degree	1 %
	SAAB/No degree	3 %
	Volvo/Bachelor	2 %
	Volvo/Master	3 %
	Volvo/Doctor/Phd	3 %

Figure 226 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 (go to Active Job List on page 175 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.

Job Number	Mailing date last run	Created By	Project Manager	CustomJobStat...	Outgo	Status	Last Executed By	Project Id
test1	30/08/2010	elea_pros	Reben Rosefusa	Open	300	Production	elea_pros	p0266448
DEMO1	01/09/2010	elea_pros	Reben Rosefusa	Open	501	Approved	elea_pros	p0266448
D1	25/08/2010	elea_pros	Reben Rosefusa	Open	9339	Approved	elea_pros	p0266448
A7		elea_pros	Reben Rosefusa	Open	0	Work In Progress		p0269005
A6	07/07/2010	elea_pros	Reben Rosefusa	Open	100	Production	elea_pros	p0266448
A5	07/07/2010	elea_pros	Reben Rosefusa	Open	500	Production	elea_pros	p0269073

Figure 227 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. Confirmit therefore provides you with a set of filters so you can reduce a long list to a manageable size.

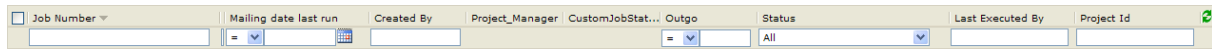


Figure 228 The Job List filter bar

- **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 Confirmit) 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 (go to How to Import a Job on page 174 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 229 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 (go to How to Export a Job on page 109 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 230 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.

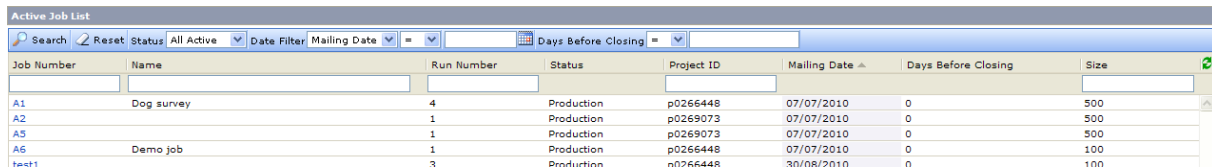
1. Go to the **Sample Management > Job List** menu comment.
The Job List window opens.

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.



Job Number	Name	Run Number	Status	Project ID	Mailing Date	Days Before Closing	Size
A1	Dog survey	4	Production	p0266448	07/07/2010	0	500
A2		1	Production	p0269073	07/07/2010	0	500
A3		1	Production	p0269073	07/07/2010	0	500
A6	Demo job	1	Production	p0266448	07/07/2010	0	100
next		3	Production	n0266448	30/08/2010	0	100

Figure 231 Example of the Active Job List

7.4.1. The Search Fields

You may have a large number of jobs that are active at one time, and a search through the list for the one job that you wish to view could be time-consuming. Conformit 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 (go to The Active Job Details Page on page 175 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.

Back Save	
Mailing Date	07/07/2010
Update Completes Rule	No items available
Update Non Responder Date	
Update Non Responder Rule	No items available
Update Non Responder Performed	☐
Close Date	
Survey Closing Rule	No items available
Status	Production

Job Number	A1
Name	Dog survey
Sample Reserved Date	07/07/2010
Modified By	olea_pros
Project Number	p0266448
Uploaded Date	07/07/2010
Created By	olea
Size	500
Last Completed Run	

Figure 232 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 Confirmit database.

Delete Search Reset Panel Fields New Matrix Import Matrix							
Name	Created	Created By	Modified	Modified By	Last Job Used	Last Used	Summary
☐ Region	18/08/2010	olea_pros	18/08/2010	olea_pros			All panelists key demographics
☐ Demo Age/Gender/Region	18/08/2010	olea_pros	18/08/2010	olea_pros			All panelists key demographics
☐ Age/Gender/Region	18/08/2010	olea_pros	01/09/2010	olea_pros			All panelists key demographics
☐ Age/gender	07/07/2010	olea_pros	07/07/2010	olea_pros	A1	07/07/2010	All panelists key demographics

Figure 233 Example of the Matrix List

The list of matrices may be extensive, so Confirmit 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 Confirmit) 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 Confirmit) 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.

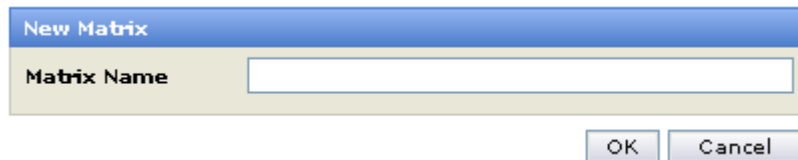
Note: You can use any combination of the above filters to find the required matrix. For example you can perform a search to find all the matrices that were created before a given date and that were created by a particular person. You can set all the required filters and then perform the search, or you 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.

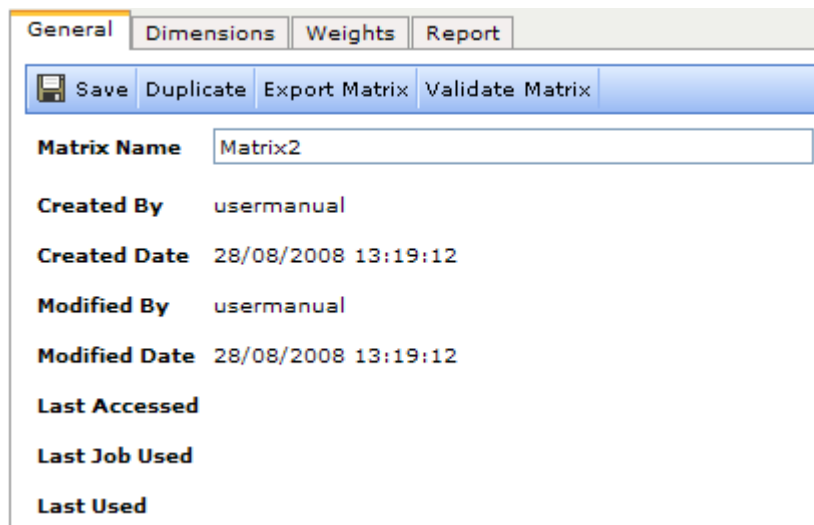


The 'New Matrix' dialog box has a blue title bar with the text 'New Matrix'. Below the title bar is a light beige background. On the left, the text 'Matrix Name' is followed by a white text input field. At the bottom right of the dialog are two buttons: 'OK' and 'Cancel'.

Figure 234 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.



The 'Current Matrix' window has a tabbed interface with four tabs: 'General' (selected), 'Dimensions', 'Weights', and 'Report'. Below the tabs is a toolbar with four buttons: 'Save' (with a floppy disk icon), 'Duplicate', 'Export Matrix', and 'Validate Matrix'. The main area contains several fields: 'Matrix Name' with the value 'Matrix2', 'Created By' with the value 'usermanual', 'Created Date' with the value '28/08/2008 13:19:12', 'Modified By' with the value 'usermanual', 'Modified Date' with the value '28/08/2008 13:19:12', 'Last Accessed', 'Last Job Used', and 'Last Used'.

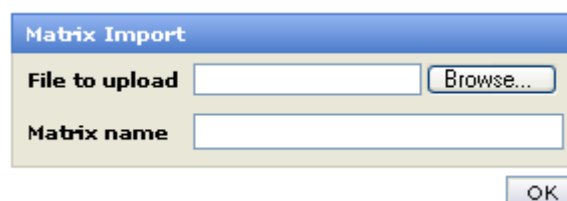
Figure 235 Creating a new matrix

You now need to define the dimensions and segments for the matrix (go to Current Matrix on page 157 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 (go to How to Export a Matrix on page 168 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 Confirmit 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.



The 'Matrix Import' dialog box has a blue title bar with the text 'Matrix Import'. Below the title bar is a light beige background. It contains two fields: 'File to upload' with a 'Browse...' button next to it, and 'Matrix name' with a text input field. At the bottom right is an 'OK' button.

Figure 236 The Matrix Import dialog box

- 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.

- Type a logical name for the matrix into the Matrix Name field.

This name will be displayed in the Matrix List window.

- 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 (go to Current Matrix on page 157 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.

Sampling Jobs								
Search Reset Remove Move Backward Move Forward View Active Refresh								
☐ Job Number	Job Type	Status	Schedule	Mailing Date	Progress	Log Entry	User ID	Comment
☐ joffe	SamplingExecuteJob	In Queue	30/08/2008 10:00:00	05/09/2008	0%		nigelb_pros	
0 of 1 selected.								
Other Jobs								
Search Reset Remove Move Backward Move Forward View Active Refresh								
☐ Job Number	Job Type	Status	Schedule	Progress	Log Entry	User ID	Comment	
No items available								

Figure 237 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.

- Click the link in the Schedule column to open the Task Scheduling window for the job.

Figure 238 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 (go to The Task Definition Properties Dialog on page 148 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.

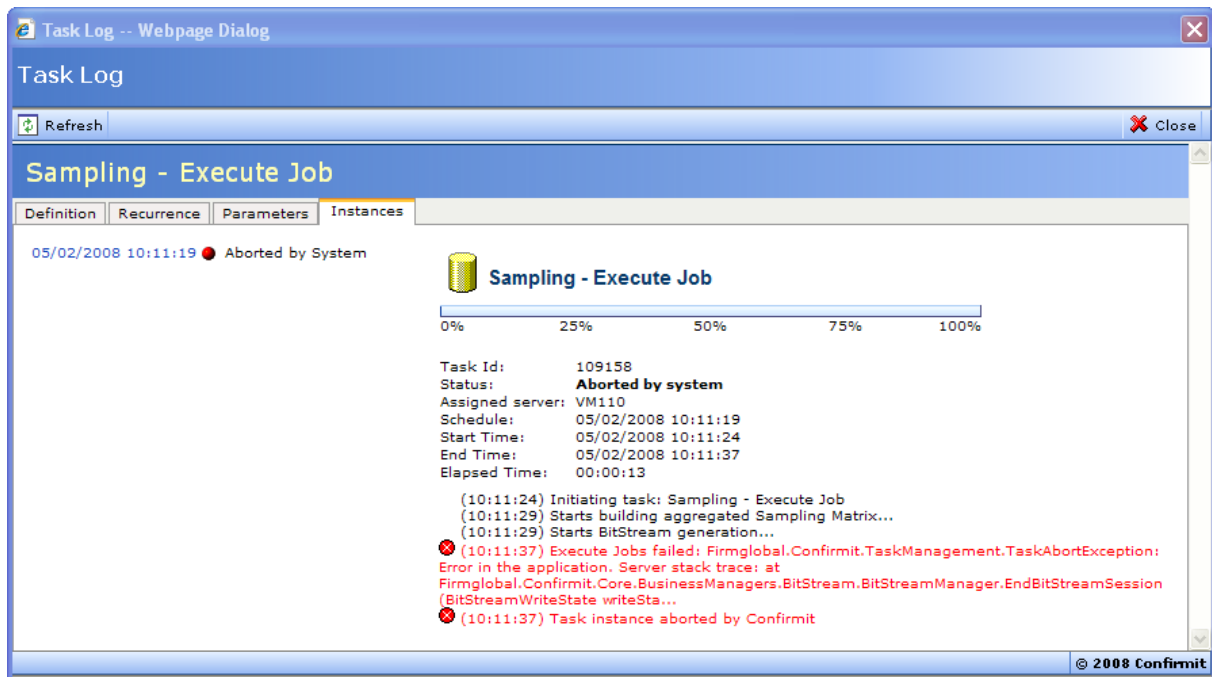


Figure 239 Example of the Task Log for an aborted job

- 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 (go to How to Set Up Recurring Tasks on page 138 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 (go to Scheduling on page 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 (go to Scheduling on page 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 (go to The Sampling Jobs List on page for more information).

3. Click **Change**.

The Recurr 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 240 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 (go to The General Tab on page 187 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. Confirmit 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 Output File** – ensure this box is checked if you require the output file (the list of panelists reserved for the job) to be created.

Note: If you select to create the output file but not to update the panel database, then Confirmit 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:

- 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 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 (go to How to Set Up Recurring Tasks on page 138 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 241 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.

The following tasks have been scheduled:			
Task ID	Status	Job Number	Description
1076	Completed	job1	Test job1 - Universal filters
1077	Completed	job7	Test job7 - Date elimination with surveystatus = 0

OK

Figure 242 Example of the task list

- 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, Confirmit 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 Confirmit.

Delete Search			New Tester Template
Template Name	Created Date	Created By	
☐ Doc Test 1	08/01/2009 14:44:14	nigelb	
☐ Doc Test 2	08/01/2009 14:44:46	nigelb	

Figure 243 Example of the Tester Templates window

7.9.1. How to Create a New Tester Template

- Click **New Tester Template** in the upper right corner of the window.

The New tester Template dialog box opens.

New Tester Template

Template Name

Cancel

< Back

Next >

Finish

Figure 244 The New Tester Template dialog box

- Type in a name for the template
- Click **Finish**.

The template is created and the Tester Template page opens.

Back Save and Close Save

Template Name

Created Date 29/08/2008 09:51:55

Created By nigelb_pros

Updated Date

Updated By

Remove Add Select Columns

Panelist ID	Email	Group Code
No items available		

Figure 245 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.

Back Save and Close Save

Template Name

Created Date 29/08/2008 09:51:55

Created By nigelb_pros

Updated Date 29/08/2008 09:55:42

Updated By nigelb_pros

Remove Add Select Columns

Panelist ID	Email	Group Code
90000001	adam.avian@confirmit.com	06
90000002	belinda.brant@confirmit.com	08
90000003	charles.chukar@confirmit.com	12

Figure 246 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 (go to How to Add Test Panelists to the Database on page 148 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.

Property	Value
Panel ID	p1619668
Date Exclusion Pre Days	0
Date Exclusion Post Days	0
Individual Rest Days Variable	No items available
Category Exclusion Pre Days	0
Category Exclusion Post Days	0
Property Exclusion Pre Days	0
Property Exclusion Post Days	0
Survey History Include Months	0
Set status of job to Production upon upload	☐
Validate Background Variables	☐
Job Number Pattern	
Default Project Filter Length	0
Default Survey Rule Template	No items available
Default Sample File Field Template	No items available
Default Data Source	No items available
Project Exclusion Default Enabled	☒
Project Link Required	☐
Category Required	☐
Output Rule	Edit
Posting Rule	Edit
Sampling Algorithm	Concurrent sampling
Dimension Collapsing Handling	Collapse Similar
Support Overlapping Segments	☐
Expected Return Variable	No items available

Figure 247 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 Confirmit 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 elimination function (go to How to Set the Date Exclusion Function on page 117 for more information).
- **Date Exclusion Post Days** – this is the default value for the “number of days after mailing date” in the date elimination function (go to How to Set the Date Exclusion Function on page 117 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 (go to The Auto Job Exclusion Tab on page 112 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 Elimination function (go to How to Set the Category Exclusion Function on page 116 for more information).
- **Category Exclusion Post Days** – this is the default value for the “number of days after mailing date” in the Category Elimination function (go to How to Set the Category Exclusion Function on page 116 for more information).
- **Property Exclusion Pre Days** - this is the default value for the “number of days before mailing date” for excluding properties (go to The Property Definitions Tab on page 190 for more information).
- **Property Exclusion Post Days** - this is the default value for the “number of days after mailing date” for excluding properties (go to The Property Definitions Tab on page 190 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.
- **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 (go to The Survey Rule Templates Tab on page 193 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 (go to The Sample File Field Templates Tab on page 192 for more information).
- **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 output file headers. Click **Edit** to open the Rule Editor page (go to Current Rule on page 72 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 (go to Current Rule on page 72 for more information).
- **Sampling Algorithm** - allows you to specify the sampling algorithm to be used for single job execution. The options are Sequential Sampling and Concurrent Sampling (go to Concurrent Sampling on page 182 for more information). When Concurrent Sampling is selected, the Expected Return Variable property becomes available (see below).

- **Dimension Collapsing Handling** - by default, Conformit 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.
- **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 (go to The Execute Job Properties on page 183 for more information).

7.10.2. Refresh Survey History Job Information

If under the **Panel Setup > Designer** menu command, the **Panel Variables toolbox > Survey History** variables have been added with an ID corresponding to the ID of a custom property for jobs, and the Characteristic property is set to LoopSupport, and the custom properties for the jobs have the Has Survey History Support property checked, then the **Refresh Survey History...** button will synchronize values in the panel based on existing values in existing jobs.

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 (go to The Job Information Tab on page 108 for more information).

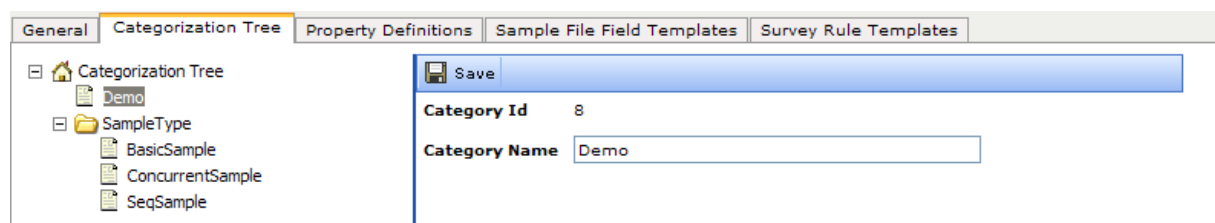


Figure 248 Example of the Categorization Tree tab

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.

Save

Categorization Group Name (new group 1)

Save

Category Id 1

Category Name (new category 1)

Figure 249 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.

General Categorization Tree Property Definitions Sample File Field Templates Survey Rule Templates

Save

Category Id 9

Category Name (new category 9)

Categorization Tree

- (new category 9)
- Demo
- SampleType
 - BasicSample
 - ConcurrentSample
 - SeqSample

Figure 250 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 (go to The Job Information Tab on page 108 for more information).

7.10.4. The Property Definitions Tab

This tab lists the existing Property Definitions, as shown in the example below.

Name	Id	Required	Show in Joblist	Use Sample File Field Template	Survey Rule Template	Survey History Support
CustomJobStatus	CJS	✓	✓	-	-	-
Project_Manager	projman	✓	✓	✓	-	✓

Figure 251 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 252 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.
- **Has Survey History Support** – allows you to add the value of the custom property to the survey history at the time of executing a job. This is so customized properties can be used in expressions in Panel Rules later.
- **Use in Elimination** – click to use the definition for Property Elimination for the job (go to How to Set the Property Elimination Function on page 118 for more information).

Note: Only one Property Definition can be used for elimination in a job. Once the Use In Elimination 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 253 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 (go to [The Sample File Fields Tab](#) on page 131 for more information).



Figure 254 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.

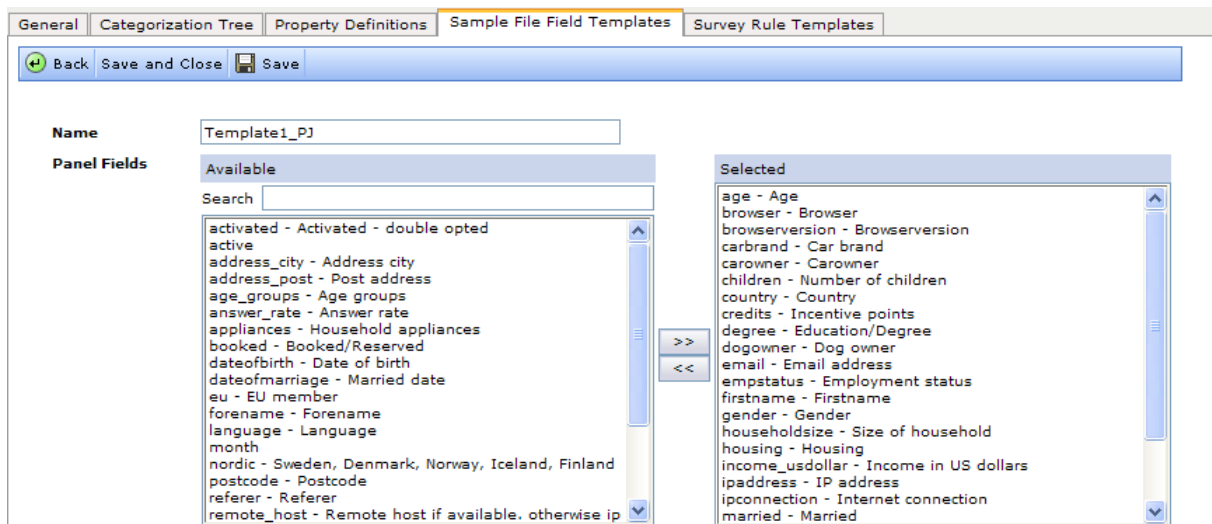


Figure 255 Example of the template editing page

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.

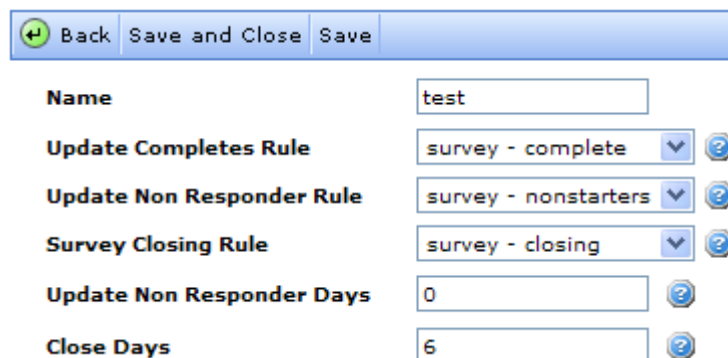


The dialog box titled "New Survey Rule Template" has a "Name" label followed by a text input field. At the bottom right, there are "OK" and "Cancel" buttons.

Figure 256 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.



The "Edit Rules" page features a toolbar at the top with "Back", "Save and Close", and "Save" buttons. Below the toolbar, there are several fields and dropdown menus:

- Name:** A text field containing the word "test".
- Update Completes Rule:** A dropdown menu set to "survey - complete" with a help icon.
- Update Non Responder Rule:** A dropdown menu set to "survey - nonstarters" with a help icon.
- Survey Closing Rule:** A dropdown menu set to "survey - closing" with a help icon.
- Update Non Responder Days:** A text field containing the number "0" with a help icon.
- Close Days:** A text field containing the number "6" with a help icon.

Figure 257 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 (go to Survey Synchronization on page 64 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 (go to Survey Synchronization on page 64 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 (go to Survey Synchronization on page 64 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. The Snapshot Panel

A "Snapshot" panel is one that has been set up to make copies of the data in a standard panel. By setting up the snapshot panel to make copies at set intervals, you can plot developments in the data over time.

Note: The Snapshot functionality is a Confirmit add-on. If you do not have access to this functionality, contact your Confirmit account manager for more information.

The snapshot is a copy of the data in a database up to the point in time for which the snapshot is taken. Note that you can set up rules that select which variables are copied, so you do not need to copy the entire database every time.

Important:
A snapshot task can generate large quantities of data, which is expensive for you to store, and will use considerable network and server resources. You are therefore recommended to copy only those variables that you need, and remove all others. In addition, if you wish to run a snapshot task as recurring, you are recommended to set it to run on a monthly basis (rather than daily or weekly). When you execute the task, a warning is displayed on your screen to this effect.

The variables that are to be included in a snapshot database must be identical to those in the panel database, however you are not required to include all the variables that exist in the panel database. Therefore, the easiest method of creating a snapshot database is often to duplicate the panel database then remove from the snapshot database the variables that are not required. See the following section for further details on duplicating and setting up a snapshot database.

8.1. How to Create a Snapshot Panel

The variables (type, precodes etc.) that are to be included in a snapshot panel must be identical to those in the panel from which the data is to be copied. The names of the variables can be different, but then the variables must be mapped (see the procedure below). Note that you can select a subset of the available variables to be copied; you are not required to include all the variables that exist in the panel.

The quickest and easiest method of creating a snapshot panel is often therefore to duplicate the original panel, then remove from the snapshot panel those variables that are not required. To create a snapshot panel by duplicating a "standard" panel, proceed as follows:

1. Open Confirmit and in the Quick Access pane to the left of the window, click **Community Panels**.

The Community Panel List opens.

2. Select the panel you wish to create a snapshot for.
3. In the page toolbar, click **Duplicate**.

The selected panel is duplicated and added to the Community Panel List with the name "Copy of <original panel name>".

4. Return to the Community Panel List and open the duplicate panel.
5. In the Panel Overview page give the project a logical name, for example the original project name + Snapshot.
6. In the Available Categories list, select the **Snapshot** keyword and click the >> button to move it to the Selected column.
7. Go to the **Panel Setup > Designer** menu command and in the Designer page remove any loops from the snapshot project.

Note: Snapshots only support top-level data; they do not support loops. If a loop is found in the panel, it will be ignored..

8. Remove any variables (questions) that you do not wish to keep in the snapshot.
9. Save the changes.
10. Go to the **Panel Setup > Database Generation** menu command, then click **Generate Database** to generate the database.

A progress window opens and the task is run.

11. On completion, return to the "standard" panel.

The standard panel must now be linked to the snapshot panel such that data from the standard panel can be copied to the snapshot.

Note: A Snapshot panel has a similar layout to a normal panel, but the Sample, Sample Management and Report menus are not available (go to The Menus on page 7 for more information).

12. On the standard panel's Overview page, click **Select Snapshot Panel**.
The Project List window opens.
13. Browse to and select the snapshot panel, then click **OK**.
The window closes and the project number for the snapshot panel is added to the field.
14. Click **Save** to save the changes.
15. Create a rule (go to How to Create a New Rule on page 93 for more information) to take a snapshot of the panel, recurring at the required intervals.
16. On the Current Rule > Source tab, set the Source Type to Panel Database.
17. Select the variables that are to be copied.
18. If required, on the Action tab create a script to perform for example data cleaning.
19. On the Target tab, set the Target Type to **Snapshot Database**.
20. In the event some of the variables in the snapshot project do not match the variables in the project database, then you can map the variables so the data will still be transferred. If this is necessary, click **Column Mapping** to open a mapping window, then map the variables as required.
21. Save the changes.
22. In the Rule Details page toolbar, click **Execute** to execute the rule.

The Execute Rule page opens with a warning message. Here you can set up the rule to recur as required (go to How to Set Up and Run a Snapshot Task on page 196 for more information). This procedure is virtually identical to that used when setting up a sampling job (go to How to Set Up Recurring Tasks on page 138 for more information).

WARNING:
Running a snapshot rule can potentially involve a lot of resources. We therefore recommend to run this Monthly if set up to be recurring.

Figure 258 The warning message displayed when you click Execute for a snapshot task

The procedure is now complete. The rule will be run according to the settings in the Execute dialog. Each time the task runs, the data generated by the task will be added to the snapshot database as new rows. Older rows will therefore not be overwritten. Note that the panelists will be allocated new Panelist IDs for each snapshot, though their original IDs will be repeated each time so for example you can extract development data for specific panelists..

8.2. How to Set Up and Run a Snapshot Task

A Snapshot task is set up and run in the same way as any other task. Once you have created and set up the Snapshot database (go to How to Create a Snapshot Panel on page 195 for more information), you can set up or edit the snapshot task characteristics for the panel at any time.

1. In the Community Panel List, find and select the panel project that you wish to edit/run the snapshot rule for.
2. Go to the **Panel Management > Rule List** menu command to open the Rule List, then select the rule that you wish to run.

Note: If the rule is already set to run or is set to run as a recurring task, you can enter the Rule Executor page by clicking the Project tasks or Recurring Tasks links located at the bottom of the Project Overview page.

3. In the Rule Details page toolbar, click **Execute**.
The Rule Execution Properties dialog open, with a warning, as shown below.

WARNING:
Running a snapshot rule can potentially involve a lot of resources. We therefore recommend to run this Monthly if set up to be recurring.

Rule Execution Properties

Rule: snapshot (302)

Comment:

Start Time: ASAP

Figure 259 Executing the Snapshot rule

4. If you wish to run the rule "manually" now, click **OK**.
The task progress page opens and the rule is run.
5. If you wish to set up the rule to run at a later time or date, or if you wish the rule to run repeatedly at set intervals, click the down-arrow beside the Start Time field and select **Schedule for later execution**, then click **OK**.

The Rule Executor page opens at the Recurrence tab.

Definition Recurrence Parameters Instances

Current Settings Initial Start Time: 29/01/2008 10:10:53

Figure 260 The Rule Executor page Recurrence tab

6. Click **Change** to access the Recurrence parameters and options.

Definition Recurrence Parameters Instances

New Start Time ☐ Disable task (clear queue) ☒ ASAP ☐ 00:00 30/01/2008

Recurring Task Yes

End By 31/12/2008

Recurrence pattern type Monthly

Monthly schedule Day 0 of every 0 month(s)

Figure 261 The Recurrence tab in Editing mode

Note: Depending on which Recurrence Pattern Type option is selected, different options and properties become available. For further details on the options, see also [How to Set Up Recurring Tasks](#).

Important:
A snapshot task can generate large quantities of data (which is expensive for you to store), and will use considerable network and server resources. Therefore, if you wish to run a snapshot task as recurring, you are recommended to set it to run on a monthly basis (rather than daily or weekly).

7. When the task is set up to your satisfaction, click **Save**.
A list of the next few scheduled occurrences is displayed.

Definition	Recurrence	Parameters	Instances
Recurrence parameters saved			
Current Settings		Initial Start Time: 30/01/2008 12:00:00 Pattern: Monthly Interval: Every 1 month(s) Range: 31/12/2008	
Next scheduled occurrences		30/01/2008 12:00:00 01/02/2008 12:00:00 01/03/2008 12:00:00 01/04/2008 12:00:00 01/05/2008 12:00:00	
Change			

Figure 262 Example of the Recurrence tab with tasks scheduled to run

To further change or disable the task, click **Change** to return to the editing page.

9. The Reporting Menu

The functionality accessed via the Reporting menu enables you to set up and manage OLAP cubes (go to OLAP Cubes on page 205 for more information), and to produce reports based on the data in those cubes.



Figure 263 The Reporting menu

Note: The Reporting functionality is a Confirmit add-on. If you do not have access to this functionality, contact your Confirmit account manager for more information.

9.1. Report List

This page lists the reports that have been created for this panel. From this page you can also create new reports using Microsoft Report Builder (go to How to Create a New Report on page 202 for more information) and default reports (go to Create Default Reports on page 204 for more information).

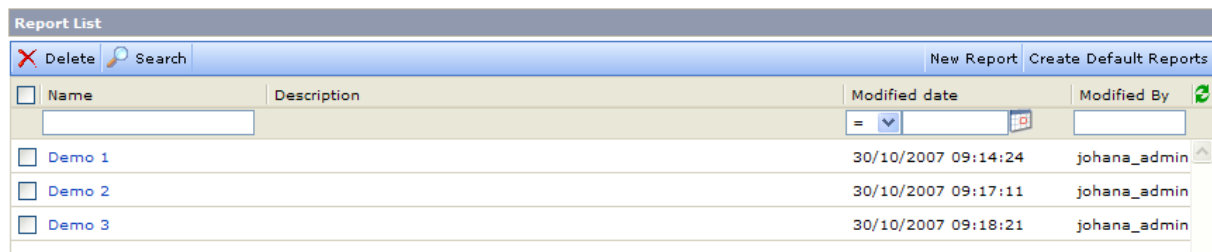


Figure 264 Example of the Report List page

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.
- **Delete** - select a report by clicking in the box, 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** to find the report you wish to work with.
- **New Report** - click to go to Microsoft Report Builder where you can create the required reports (go to How to Create a New Report on page 202 for more information).
- **Create Default Reports** - click to create a set of "pre-designed" standard reports (for example Number of panelists : Time) that are stored on the server (go to Create Default Reports on page 204 for more information). You can then either use these reports as they are, or edit them.

9.1.1. The Report > General Tab

In the Report List, click on a **Report Name** link to access that report. The report page opens at the **General** tab. This tab shows general information about the report, such as the creator's user name, when the report was created etc. as shown in the example below.

Figure 265 Example of the General tab for a report

Note that you can add comments into the Description field. If you add or change any text in the field, click **Save** to save those changes.

- To view the actual report, go to the **View** tab.
- Click **Back** to return to the Report List.

9.1.2. The Report > View Tab

Go to the **View** tab to view the report (the page may take a few seconds to generate).

		Month_Attribute (Snapshot Count)			
genderText	age_groupsText	January 2009	February 2009	March 2009	Total
Not Answered	Total	2			2
Female	Total	16505	18202	18997	53704
Male	Total	25080	27704	28912	81696
Total		41587	45906	47909	135402

Figure 266 Example of a report

In the event the report extends over several pages you can select the page you wish to view. You can also zoom in or out by selecting the desired magnification, search for words or characters, print out the current report page and export the report in a specified format. The export formats available are:

- XML file with report data
- CSV (comma delimited)
- TIFF file
- Acrobat (PDF) file
- Web archive
- Excel

Note that any exports must be performed manually - they cannot be automated.

9.1.3. MS Report Builder

Microsoft Report Builder is a powerful yet easy-to-use tool that allows users to create and design reports. Using Report Builder, you can select data and design reports without having to understand how and where the data is stored. Nor do you need to know any complex programming languages in order to create the reports. You simply need to be familiar with the information stored in your databases.

You can create table, matrix, or chart reports. To get started, select a report layout template and then simply drag and drop the fields that you wish to use into the design area. You can then manipulate your data by filtering, grouping and sorting, or working with formulas. Once you have saved your report to the report server, you can manage it just like any other report on the server. You can also export the report to your local computer as a different file type, such as a TIFF, PDF, Excel, or HTML file.

Report Builder builds reports based on a data source, sometimes called a report model, provided to you by the model designer, typically an analyst, database administrator, or database developer. A data source contains information about the data available in the database and the relationships between that data. When you drag-and-drop the fields onto the design area, you are laying out the report and providing the information needed to retrieve your data at the same time.

MS Report Builder is a fully integrated component of SQL Server 2005 Reporting Services.

Refer to the following section for installation instructions.

9.1.3.1. Installing MS Report Builder

Confirmit Community Panels uses the Microsoft Report Builder application to create reports, so the first time you create a new report you will need to download and install the application. Proceed as follows:

1. Click the **New Report** button towards the right end of the Report List toolbar.

A security warning dialog opens.

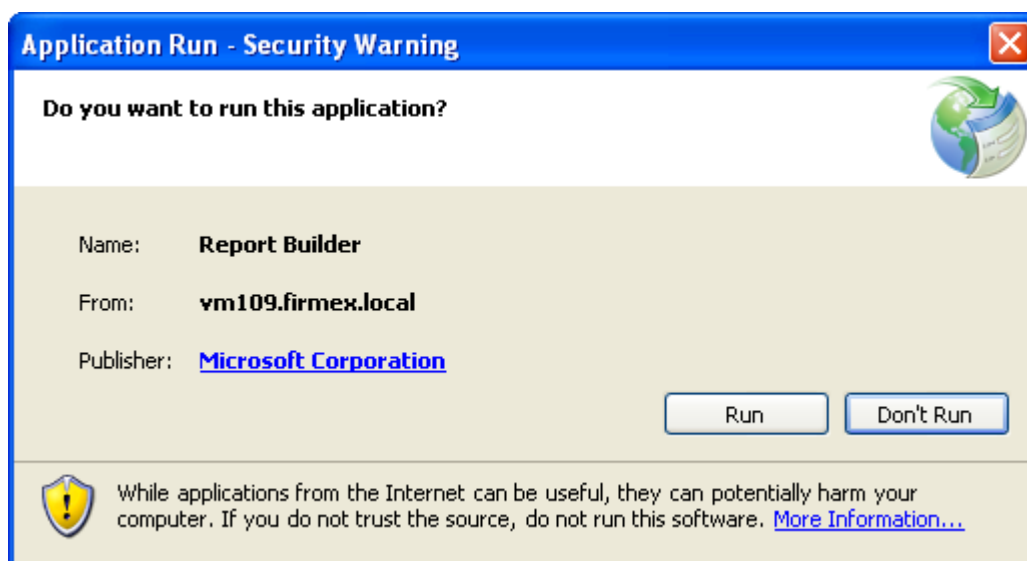


Figure 267 The Security Warning dialog

2. Click **Run**.

A progress dialog is displayed. Once the application has downloaded and installed, this is replaced by the Microsoft Report Builder window and the application's login page.

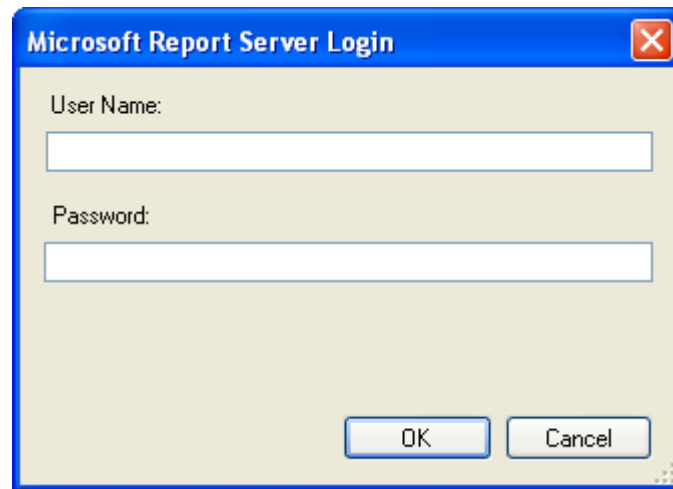


Figure 268 The MS Report Builder login dialog

3. Type in your Confirmit user name and password and click **OK**.

The login dialog closes and the Microsoft Report Builder window is activated. You can now commence creating your report.

9.1.4. How to Create a New Report

Confirmit Community Panels uses the Microsoft Report Builder application to create reports. The first time you create a new report you will need to download and install the application (go to Installing MS Report Builder on page 201 for more information). Once you have installed MS Report Builder, proceed as follows:

1. In the Report List page, click the **New Report** button located towards the right end of the menu.

The Microsoft Report Builder window opens along with the login dialog.

2. Type in your Confirmit user name and password and click **OK**.

The login dialog closes and the Microsoft Report Builder window is activated as shown below.

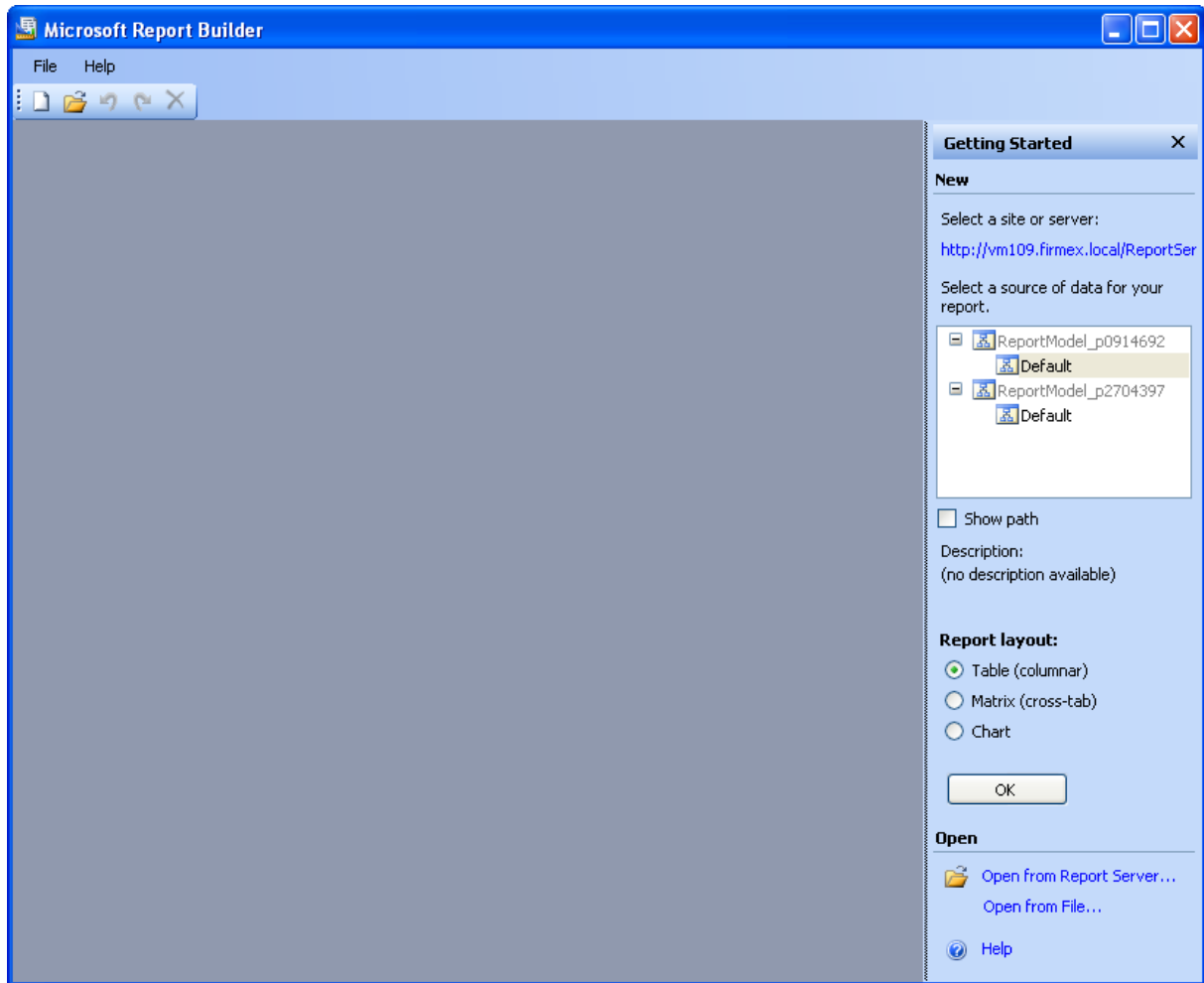


Figure 269 The MS Report Builder application ready for use

3. In the getting Started column, select the report server or library where your data is stored (if necessary), and the source of the data that you want to use.
4. Select the desired report layout, then click **OK**.

The report designer page opens, with the available variables listed in the Explorer column. In the figure below, the Table layout has been selected.

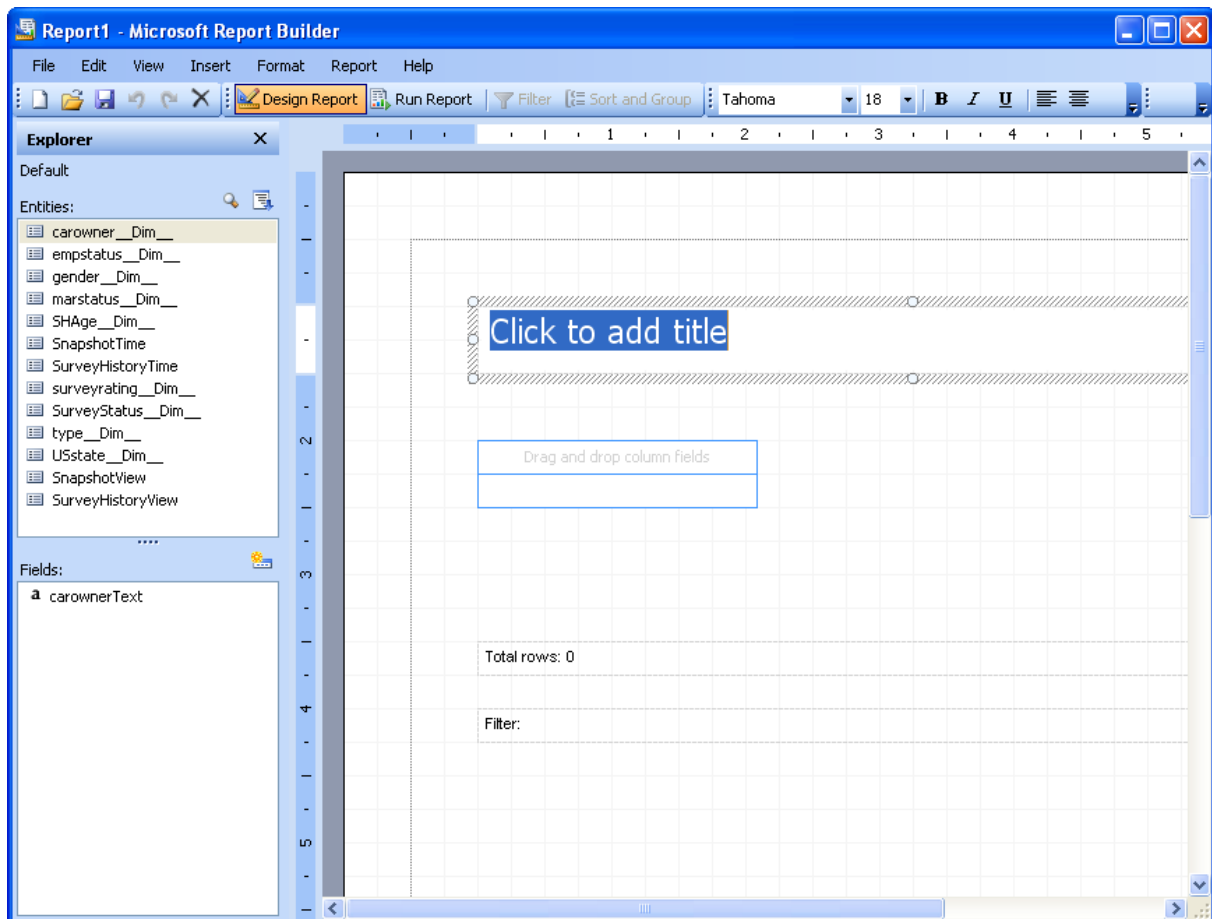


Figure 270 The Report Builder design area

5. Click in the **Click to add title** area and type in the title of your report.
6. Drag the required Entities and/or Fields into the table.
7. Right-click on the various areas in the report and select **Format** to format the font, coloring etc. for the areas.
8. On completion, click **Run Report** to process the data and view the report.
9. In the event you wish to edit the report, click **Design Report** to return to the report design window.
10. Click **Save** to save the finished report.

For further details on using this Microsoft product, use the application's Help system or go to www.microsoft.com, then search for **Report Builder**.

9.1.5. Create Default Reports

If you find you often need to create reports that use the same layouts and/or variables, for example a report that shows how your panel is developing ("Number of panelists" against "Time"), you can create "default" reports and store them on the server. Then when you need such a report, instead of creating it from the beginning you can click the **Create Default Reports** button. This will place into the Report List a copy of each of the default reports that have been stored on the server. You can then delete any of the reports that you do not need for this panel, and edit those that you do need such that they contain the correct variables, have the desired layouts etc.

9.2. Cube Management

This menu command provides access to the OLAP cube functionality. Via this menu you can create, generate, edit and process the cubes. See the following sections for further information.

9.2.1. OLAP Cubes

Most databases for online transaction processing are designed for efficiency in data storage, and treat all data in the database similarly. An OLAP (OnLine Analytical Processing) cube is a specially designed database that is optimized for reporting, and it is designed such that the data is stored in a way that makes it simple and efficient to retrieve.

In an OLAP Cube system, the data in the database array is arranged such that it allows fast analysis of large amounts of data. OLAP cubes can be thought of as extensions to the two-dimensional array of a spreadsheet.

OLAP cubes categorize data into "Dimensions" and "Measures".

- **Measures** - represent items that are counted, summarized or aggregated, such as costs or units of service.
- **Dimensions** - are variables by which measures are summarized, for example hospitals, doctors, or dates of service.

This organization of data greatly facilitates the ability to formulate data requests based on real-life situations. Much of the required data can be extracted from the database and processed in advance of the user request. In addition, many of the queries that could be posed to the data are "pre-aggregated" in the database such that the answers have already been calculated. On request, these results can be reported without further processing, thereby saving time for both the server and the user.

The term "cube" comes from the geometric object that has three dimensions. OLAP cubes can have many more dimensions than 3, but the term continues to apply.

For example:

Assume a financial analyst has access to a product database and wants to view the data in various ways, such as displaying all the cities down the page and all the products across a page. And this layout could be for a specified period, product version and type of expenditure. Having viewed the data in this particular way, the analyst might then immediately wish to view it in another way. With the data arranged as an OLAP cube, the cube could effectively be re-oriented so that the data displayed now had periods across the page and type of cost down the page. This re-orientation would normally involve re-summarizing very large amounts of data. However by using the OLAP cube system the new view of the data can be generated efficiently and quickly; i.e. within seconds rather than the hours a relational database and conventional report-writer might take, so avoiding wasting the analyst's time.

9.2.2. The Cube Details > General Tab

This tab displays general information about the cube.

Cube Details > General Tab	
Delete Save Generate Cube Process Cube Edit Cube General Dimensions Measures	
Description	
Created By	johana_admin
Created Date	30/10/2007 09:09:59
Last Modified By	johana_admin
Last Modified	30/10/2007 09:13:13
Last Generated By	johana_admin
Last Generated	30/10/2007 09:10:20
State	Processed
Last Processed	30/10/2007 09:13:13
Last Processing Mode	ProcessIncremental
Ignore Error When Key Not Found	☐ ?

Figure 271 Example of the Cube Details > General tab

Note that you can add comments into the Description field. If you add or change any text in the field, click **Save** to save those changes.

- **Ignore Error When Key Not Found** - a "Key not found" error will occur, and the processing task will abort, if a key value exists in a fact table but does not exist in the corresponding dimension. Check this box to tell Confirmit to ignore these errors and complete the task.

The remainder of the information on the tab is read-only.

9.2.3. The Cube Details > Dimensions Tab

This is an information tab that displays the dimensions selected for the cube in the cube wizard (go to How to Create or Edit a Cube on page 207 for more information). The information is read-only on this tab, though you can change the selected dimensions by clicking **Edit Cube**.

Selected Time Dimension From	Selected Time Dimension To
01/01/2006	01/01/2008

Selected Panelist Dimensions
carowner__Dim__
empstatus__Dim__
gender__Dim__
marstatus__Dim__
USstate__Dim__

Selected Survey History Dimensions
InvitationDate__Dim__
SHAge__Dim__
SurveyStatus__Dim__
type__Dim__
ReservedDate__Dim__
surveyrating__Dim__

Figure 272 Example of the Cube Details > Dimensions tab

The dimensions listed under Selected Panelist Dimensions and under Selected Survey History Dimensions can be crossed with other dimensions in the same group. Note however that dimensions listed in one group cannot be crossed with dimensions listed in the other group.

9.2.4. The Cube Details > Measures Tab

This tab shows the measures (numerical data) that have been created/selected in the cube wizard (go to How to Create or Edit a Cube on page 207 for more information). The information is read-only on this tab, though you can change the selected dimensions by clicking **Edit Cube**.

Figure 273 Example of the Cube Details > Measures tab

9.2.5. How to Create or Edit a Cube

Note: A snapshot setup normally incorporates one normal panel, one snapshot panel and one cube. In the event a cube already exists for a snapshot panel, then the Create Cube button is replaced by the Edit Cube button - the procedure is identical.

1. Go to the **Reporting > Cube Management** menu command.
The Cube Details page opens.
2. Click **Create Cube** or **Edit Cube** as appropriate.
The Create New Cube wizard opens at the Description dialog.

Figure 274 Step 1 when creating a new cube

3. Type into the field a description of the cube for future reference, then click **Next**.
The Select Dimensions page opens.

Create new Cube. Step 2/5: Select Dimensions

Panelist Dimensions

Available

- AccessFromCyberCafe
- AccessFromHome
- AccessFromLibrary
- AccessFromOther
- AccessFromSchool
- AccessFromWork
- AgePresOfKids
- AOLBrowser
- AOLUser
- BusinessOwner

Selected

Survey History Dimensions

Available

- CompletedDate
- GroupNumber
- JobIsClosed
- ReservedDate
- StartDate

Selected

Time Dimension

From: 01/01/2007

To: 31/12/2008

Partitions

Snapshot Months: 1

Survey History Months: 1

Additional Partitions to Process: 1

Buttons: Cancel, < Back, Next >, Finish

Figure 275 The Select Dimensions page

- The From and To dates defines the time span of the data that you will be able to report on. You will have access to three attributes for the reports; Year, Month and Date and one hierarchy: Year-Month-Date.
- Partitions are useful when dealing with large cubes. The data in the cube will be stored in partitions, and here you are able to specify how many months of data should be in each, and how many you would like to process incrementally.
 - o **Snapshot Months** - specifies how many months of Snapshot data you would like in each partition.
 - o **Survey History Months** - specifies how many months of Survey History data you would like in each partition.
 - o **Additional Partitions to Process** - specifies how many partitions should be updated when doing Incremental Processing.

Note: The dimensions selected here are listed on the **Cube Details > Dimensions tab** (go to The Cube Details > Dimensions Tab on page 206 for more information).

4. Select the required Panelist and/or Survey History Dimensions.
5. Set the dates to define the time-span of the report data.
6. Specify the partition details.
7. Click **Next**.

The Select Panelist Measures page opens.

Create new Cube. Step 3/5: Select Panelist Measures

Select Measures

Select the measures that you want to include in the cube

Available Panelist Measures

AccessFromCyberCafe

AccessFromHome

AccessFromLibrary

AccessFromOther

AccessFromSchool

AccessFromWork

ActiveDaysOnPanel

AOLBrowser

ClosedCustomCounter

ClosedJobsCounter

ClosedTrackerCounter

CNRCounter

CoreDemoCell

Days_On_Panel

DontKnowBrowser

FHActualAge

FireFox

IBMBrowser

ICab

InactiveReclaimCounter

Measure Type

Count

Add

Remove

Selected Panelist Measures

Measure Name

Measure Type

Cancel

< Back

Next >

Finish

Figure 276 The Select Panelist Measures page

8. Select the Panelist Measures that are required in the cube. To do this, click on a Measure in the left column to select it, select a Measure Type, and click **Add**.
9. Click **Next**.
The Select Survey History Measures page opens.

- 209 -

Figure 277 The Select Survey History Measures page

10. Select the Survey History Measures that are required in the cube. To do this, click on a Measure in the left column to select it, select a Measure Type, and click **Add**.
11. Click **Next**.
The Create and Process Cube page opens.

Figure 278 The Create and Process Cube page

12. Check the box if you wish to create and process the cube, then click **Finish**.
The Generate and Process Cube page opens.

Figure 279 The Generate and Process Cube page

13. Add any comments to the Comments field and select a start time for the task.
14. For the Generate Cube and Process Cube properties, select the required functions.
 - **Generate Cube:**
 - o **Update cube** - updates the cube based on the latest changes performed in the cube editor. This option is only available if the cube is already generated.
 - o **Create new cube** - creates a new cube from the beginning. If a cube has been generated previously, its database will be dropped removing the cube, dimensions, datasources and datasource views. All data in the existing cube will be lost. This could be used if you need to recreate the partition sizes.
 - o **None** - will not update the cube even through changes have been made in the wizard. This option could be used if you only need to process the cube.
 - **Process Cube:**
 - o **Process full** - processes all objects.
 - o **Process incremental** - processes all Dimensions and number of specified partitions. This option is only available if the cube has already been generated and processed full.
 - o **Process none** - will not perform any processing. This option could be used if you only need to generate the cube.
15. Click **OK**.
The task is run when specified and a progress page is displayed.
16. On completion, click **OK** to return to the Cube Details page (go to The Cube Details > General Tab on page 205 for more information).

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 Community 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 Community Panels functionality.

10.1. How to Attach a Panel to the Survey

If your company is using the Community 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 Community Panel property is located towards the bottom of the page.

The screenshot shows the 'Community Panel' section of a survey configuration page. It includes a 'Status' field set to 'production', a 'Deployment' field showing a URL, a 'Panelist Registration Survey' checkbox, and a 'Community Panel' section with a text input field containing 'Allow current survey to access', a 'Find Panel...' button, and a 'Clear' button. Below this is an 'Enforce HTTPS in Advanced Reporting' checkbox.

Figure 280 The Community Panel property

2. Type the Panel ID into the field, or
3. Click the **Find Panel** button.
The Find Community 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.

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).

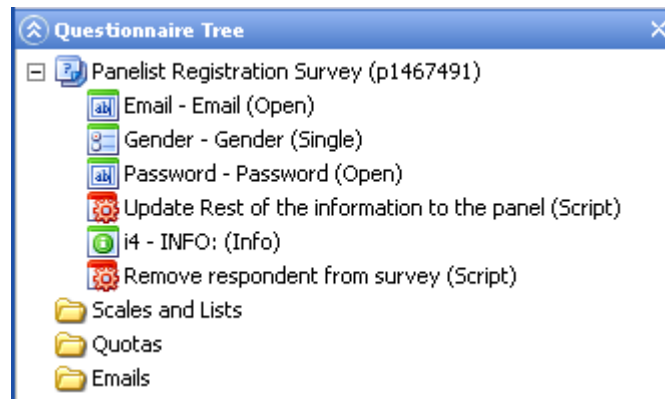


Figure 281 Example of a simple Panelist Registration survey

Note: Security standards built into Confirmit 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 Confirmit 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.

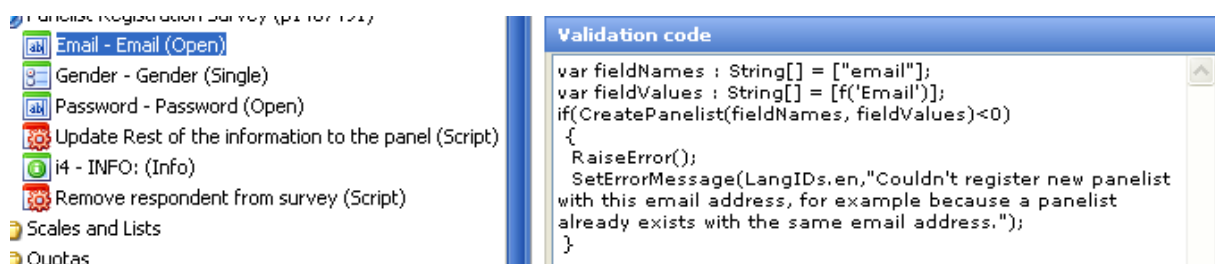


Figure 282 Example of script to check whether the email address already exists

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 283 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.

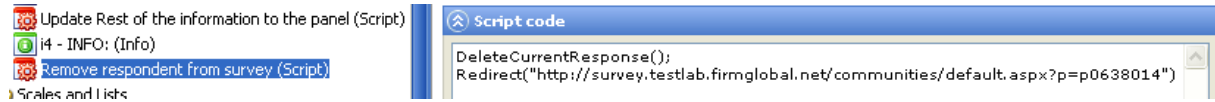


Figure 284 Example of script to delete the information from the survey

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.

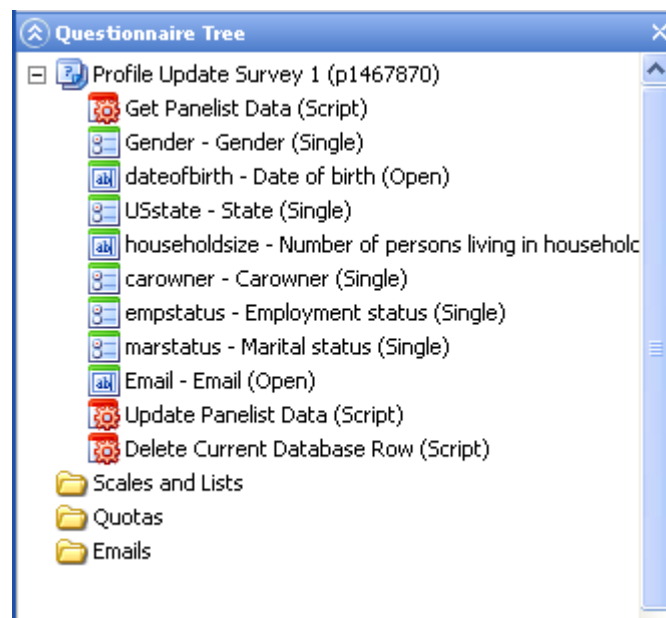


Figure 285 Example of a simple Panelist Update survey

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 286 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.

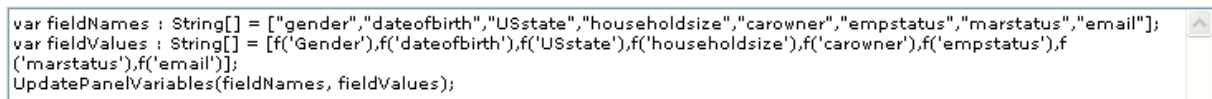


Figure 287 Example of script to update existing panelist information

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 288 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 289 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 (go to How to Attach a Panel to the Survey on page 212 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: Confirmit 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.

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