COMMUNITY PANELS USER GUIDE

C12.5 Revision 1

The information herein describes Confirmit Community Panels and its features as of May 2008. 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.

What's New in this Issue?

This document is the first edition of the Confirmit Community Panels User Guide. In future editions and updates of this document, changes to the text will be listed here.

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

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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 website. Within the Market Research industry, many agencies also use Panels to collect data and conduct research.

A panel functions in the same way as a normal survey. Typically, a panel consists of mapping and profiling questions, and other categories such as work-related and household questions. The panelists register themselves in the panel, or you can import people directly into the panel if you already have their information. Based on the panelist information stored in the Panel (community), you can select appropriate respondents and invite them to participate in surveys.

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.

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 – up to 10 million.
- 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:
    - Limit the number of open text fields included when sampling. BitStream files should only include the fields to be used in filtering and sampling matrices, not the fields you need for the respondent file.
    - Open text fields that are to be part of the BitStream files should be limited to 4 characters.
    - Note that Open text fields are not supported as segments in the sampling matrix.
    - To optimize the panel database: use Boolean data types and numeric precodes whenever possible, and numeric ranges between 0 and 255 should be specified.

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.

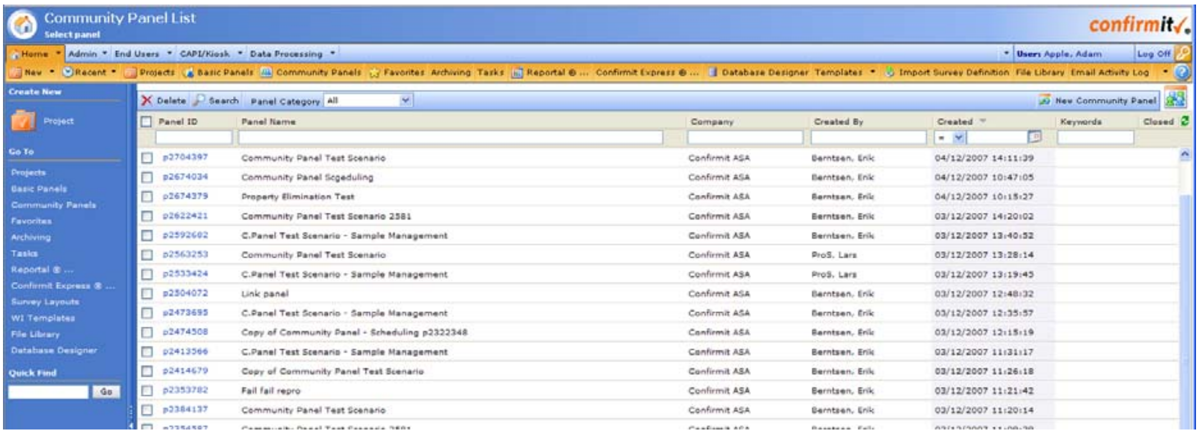


Figure 1 Example of the Community Panels List page

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 key words 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 (go to Overview on page 14 for more information) (also accessible via the **Panel Utilities > Overview** menu command) for the selected panel opens.

2.2. 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 jobs according to the company under which it is registered.

- **Created By** – allows you to search for jobs 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.

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.

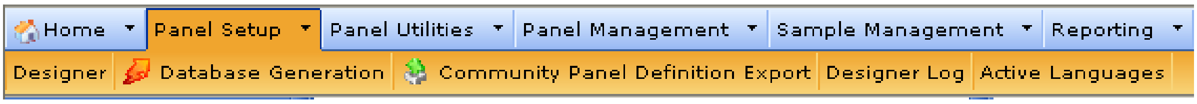


Figure 2 The Panel Setup menu commands

The menu commands are as follows:

- **Designer** – the database definition page (go to Designer on page 7 for more information).
- **Database Generation –** generates and updates the database (go to Database Generation on page 11 for more information).
- **Community Panel Definition Export –** export the database definition to another server (go to Community Panel Definition Export on page 12 for more information).
- **Designer Log –** a "read-only" log of the main events occurring in the panel (go to Designer Log on page 12 for more information).
- **Active Languages –** select the languages to be used (go to Active Languages on page 13 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 2 for more information) the Panel Utilities menu appears as shown below.

Figure 3 The Panel Utilities menu commands

The menu commands are as follows:

- **Overview –** provides general information on the selected panel (go to Overview on page 14 for more information).
- **Community Portals** – contains the commands you use to create and edit your Community Portals (go to Community Portals on page 19 for more information).
- **Panel Activity Log –** logs activity on the panel (go to Panel Activity Log on page 46 for more information).
- **Database Cleanup –** removes deleted questions from the Panel database (go to Database Cleanup on page 48 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 49 for more information).

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 4 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 50 for more information).
- **Multiple Panelist Editor –** enables you to edit the details of several/many panelists simultaneously (go to Multiple Panelist Editor on page 54 for more information).
- **Current Rule –** shows the details of the rule currently selected in the Rule List (go to Current Rule on page 57 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 70 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 73 for more information).
- **Rule Set List –** displays a list of the available rule sets (go to Rule Set List on page 75 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 76 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.

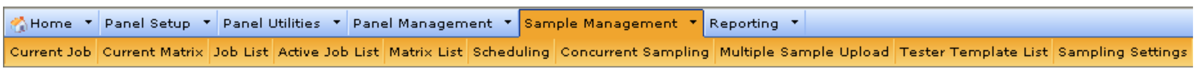


Figure 5 The Sample Management menu commands

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 78 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 125 for more information).
- **Job List –** lists all the sampling jobs that you currently have "in progress" (go to Job List on page 134 for more information).
- **Active Job List –** lists all the sampling jobs that are currently "in production" (go to Active Job List on page 137 for more information).

- **Matrix List –** lists all the matrices currently available in your Confirmit database (go to Matrix List on page 138 for more information).
- **Scheduling –** lists the jobs that are awaiting execution and those that have been run (go to Scheduling on page 141 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 144 for more information).
- **Multiple Sample Upload** – enables you to upload several jobs simultaneously (go to Multiple Sample Upload on page 146 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 147 for more information).
- **Sampling Settings –** allows you to set default values and rules for the panel (go to Sampling Settings on page 148 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.

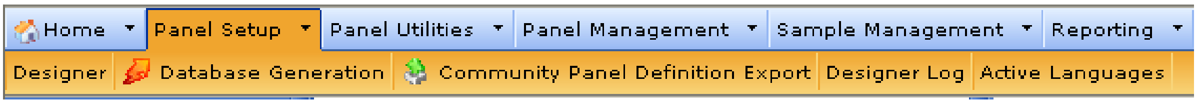


Figure 6 The Panel Setup menu commands

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 two sections:
  - **The Questionnaire Tree 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 11 for more information). Note that each "question" in the Questionnaire Tree will become a column in the database.
  - **The New Objects toolbox –** lists the objects you can use in the database. Drag and drop objects from here to the Questionnaire Tree.
- **The Question Details area –** double-click on a question in the Questionnaire Tree 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.

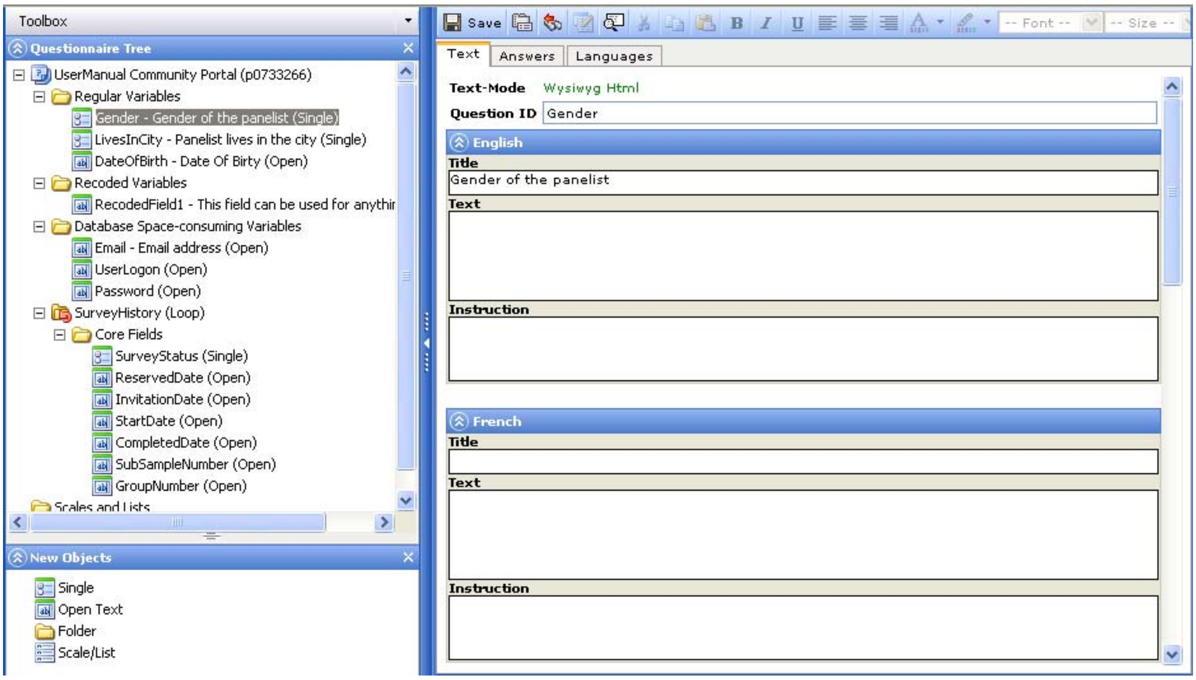


Figure 7 Example of the Professional Designer page

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

4.1.1. The Questionnaire Tree 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 (here “User Manual Community Panel”) and the yellow “Sales and Lists” folder will be used in the database. The objects available are listed in the New Objects toolbox. The database columns will be listed in the order in which they are placed in this tree.

4.1.1.1. How to Add an Object to the Tree

There are four 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 Questionnaire Tree.
- **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.

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 48 for more information).

1. In the Questionnaire Tree, 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:
  - **Reserved** – the panelist is selected for a job but the invitation email has not yet been sent (a short-term status).
  - **Invitation Sent** – an invitation to participate in the survey has been sent to the panelist but the panelist has not yet accessed the survey.
  - **In Progress** – the panelist has started the survey but has not yet completed it.
  - **Completed** – the panelist has completed the job.
  - **Stopped By System** – the panelist has been 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.
- **JobIsClosed** – specifies whether or not the job is closed.

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 Confirmit Authoring.

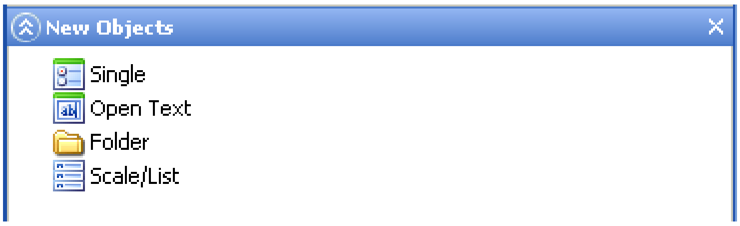


Figure 8 The objects available in the New Objects toolbox

4.1.3. 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.

4.1.3.1. Question Properties

The question objects in the Questionnaire Tree 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 Questionnaire Tree, 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.

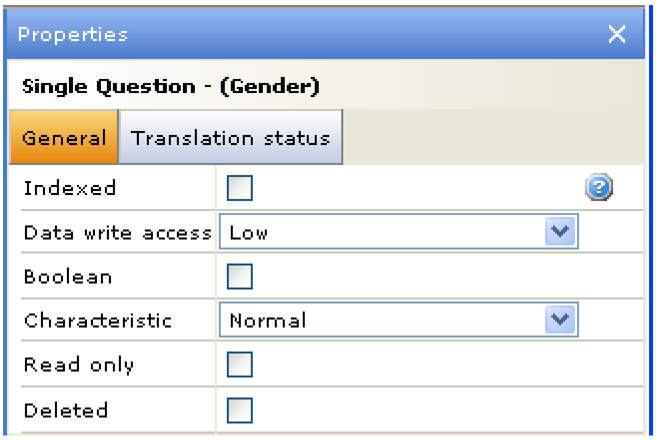


Figure 9 The Properties pane for a Single question

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.
- **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 Write Access –** this is the Write access permission level for the data in the database column (go to Access Permission Levels on page 18 for more information). The options here are:
    - **Low –** all users with normal access permission can edit the data in this column.
    - **Medium –** only users with access levels Medium or High can edit the data in this column.
    - **High –** only users with access level High can edit the data in this column.
- **Boolean –** applicable for Single questions. If selected, the question can have only two options, and the 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 11 for more information). The options are:
    - **Normal –** columns for which you expect the majority of operations will be reading of the data contained.
    - **Recoded –** columns for which you expect the majority of operations will be writing of data.
    - **Space Consuming –** columns for which you expect the data contained will usually take a lot of space in the database, for example free-test fields.
    - **Loop Support –** defines a column as "Job-specific" information. Some information in the database is related to the survey job rather than to the specific panelist. When a number of panelists are selected for the same job, then that job information could be repeated for every panelist. To avoid expanding the database with repeated information, job-specific information is held in a separate section of the database. That section is then referred to for each panelist it applies to.
- **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.
- **Deleted –** will be checked if the question has been deleted from the Questionnaire Tree (go to How to Delete an Object from the Tree on page 8 for more information). Uncheck to undelete the question (go to How to Undelete an Object on page 8 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.

4.1.3.2. 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 7 for more information).

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

   The page shown below is displayed.

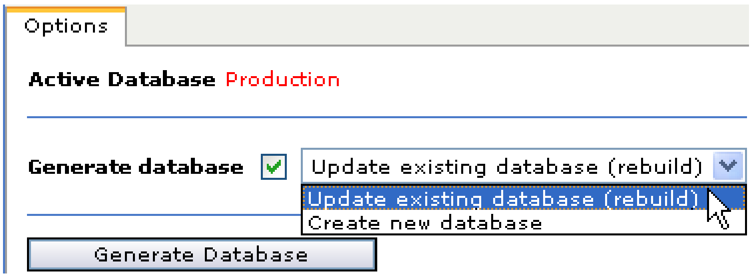


Figure 10 The Generate database Options tab

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 definitionsfrom 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.

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.

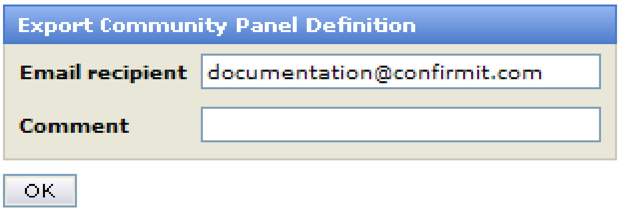


Figure 11 The Survey Definition Export dialog box

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.

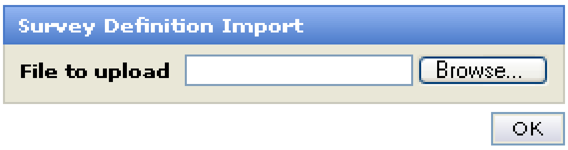


Figure 12 The Survey Definition Import dialog

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. 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.

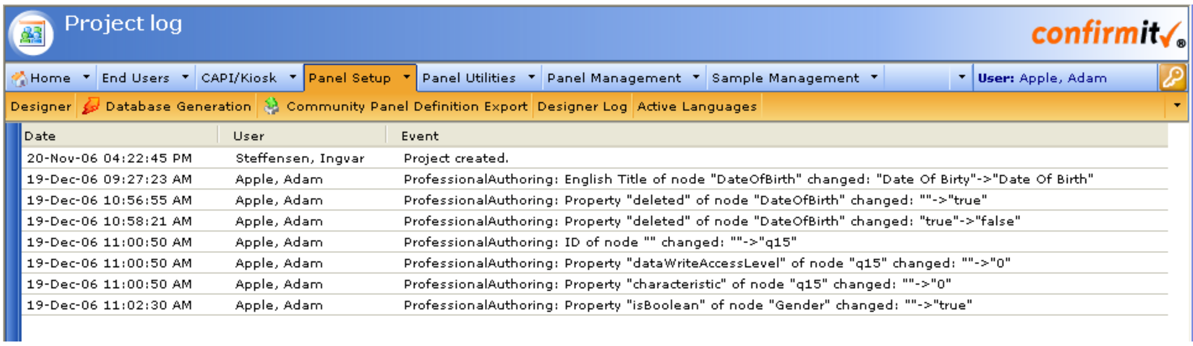


Figure 13 Example of the Designer Log page

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 14 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, 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.

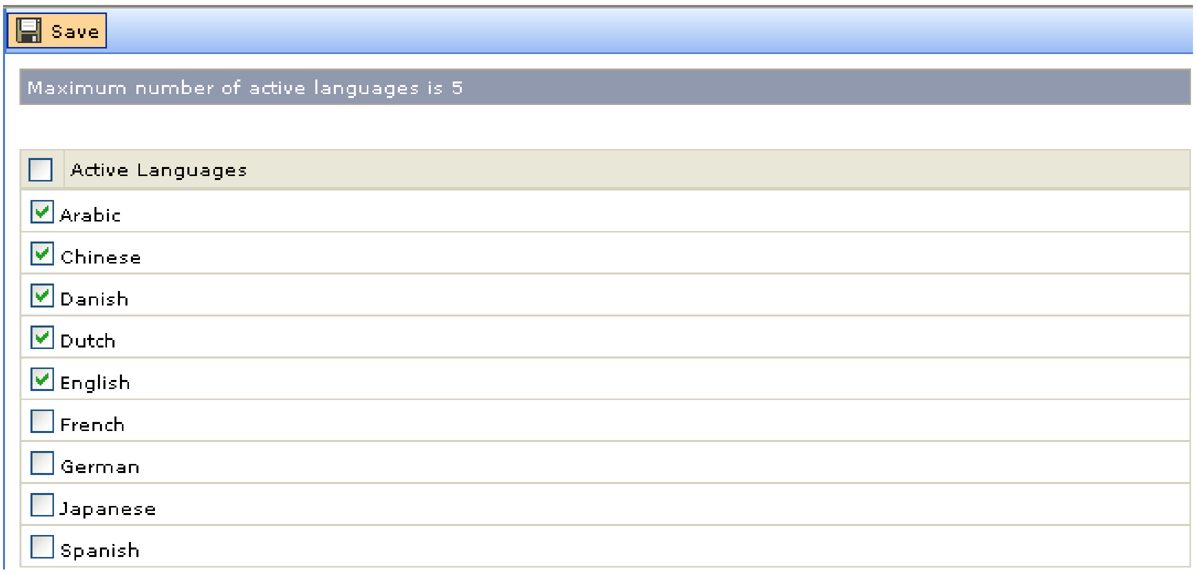


Figure 14 Example of the Active Languages pane

The functionality on this tab is also available via the **Panel Utilities > Overview > Active Languages** tab (go to The Active Languages Tab on page 19 for more information).

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.

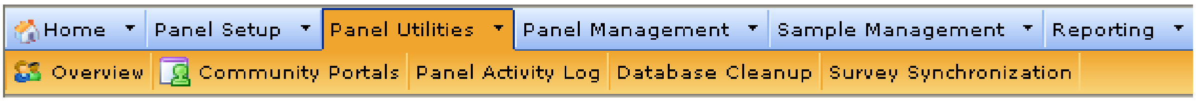


Figure 15 The Panel Utilities menu

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.

5.1.1. The General Tab

This tab displays general information about the panel.

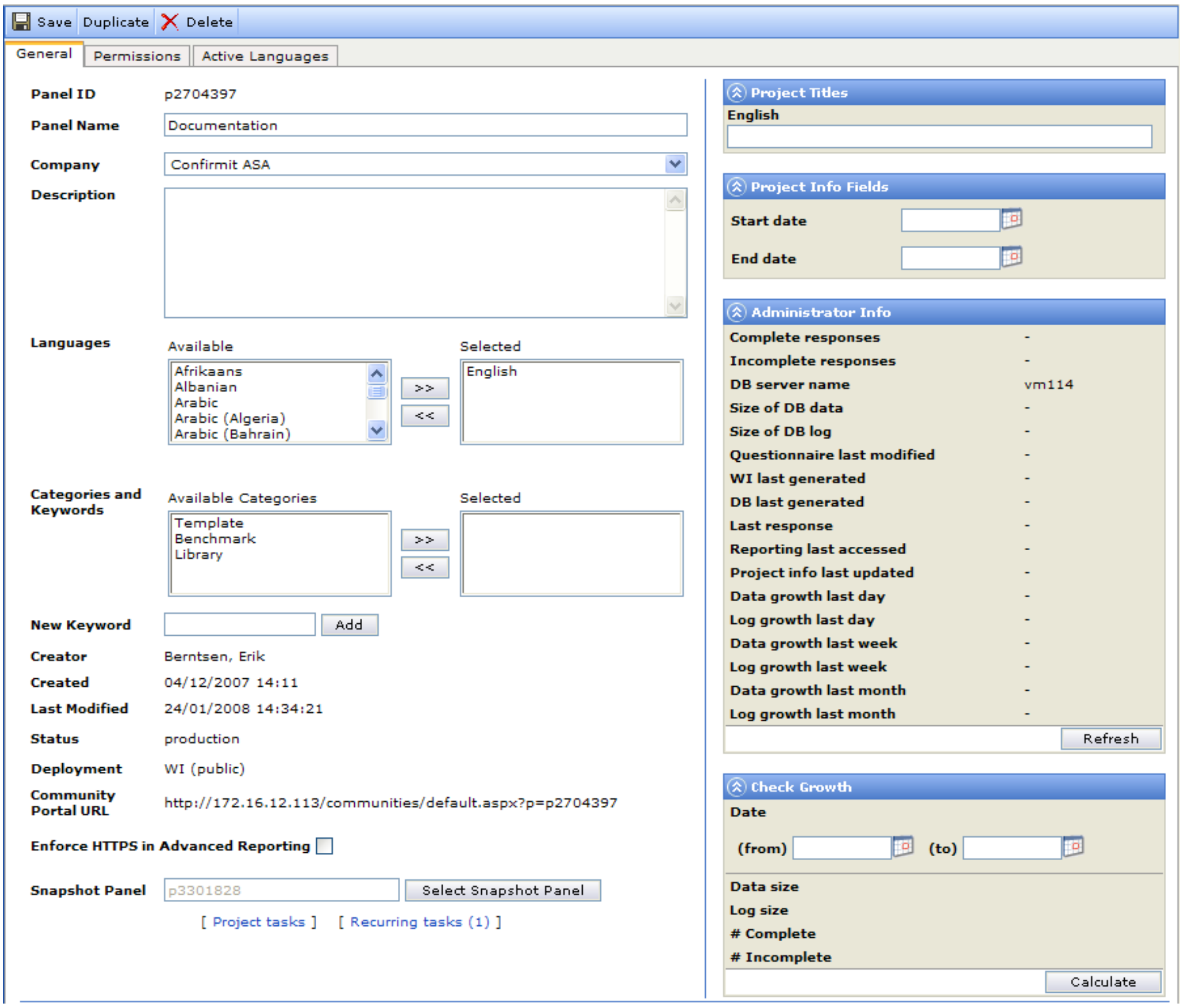


Figure 16 Example of the Panel Overview General tab for a panel

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 19 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 2 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.
- **Snapshot Panel** - if you have created a snapshot database to take snapshots of this panel (go to The Snapshot Panel on page 155 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 Tasks Management Page on page 15 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 107 for more information).

5.1.1.1. The Tasks Management 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.

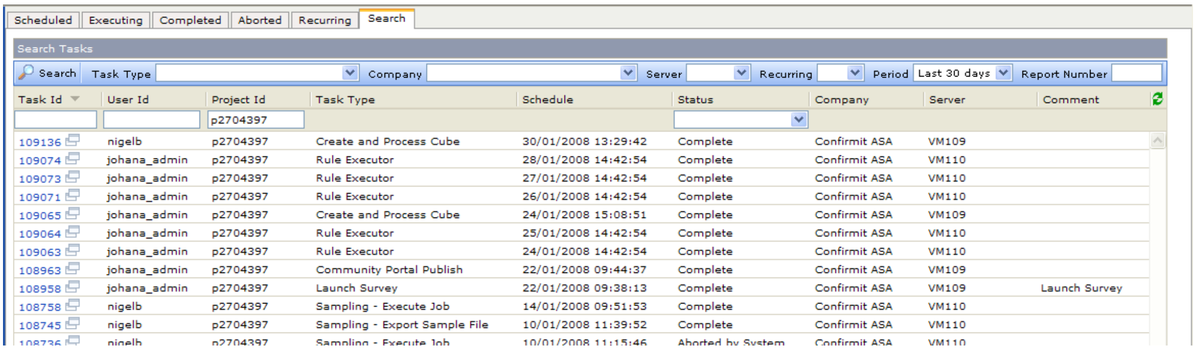
To access this page, from the Panel Overview page General tab click the **Project tasks** button at the bottom of the page. The page opens at the Search tab. Confirmit users who have Administrator permission to a project will be able to see and search for all batch tasks that have been set up for this 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 112 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
		p2704397						
109136	nigelb	p2704397	Create and Process Cube	30/01/2008 13:29:42	Complete	Confirmit ASA	VM109	
109074	johana_admin	p2704397	Rule Executor	28/01/2008 14:42:54	Complete	Confirmit ASA	VM110	
109073	johana_admin	p2704397	Rule Executor	27/01/2008 14:42:54	Complete	Confirmit ASA	VM110	
109071	johana_admin	p2704397	Rule Executor	26/01/2008 14:42:54	Complete	Confirmit ASA	VM110	
109065	johana_admin	p2704397	Create and Process Cube	24/01/2008 15:08:51	Complete	Confirmit ASA	VM109	
109064	johana_admin	p2704397	Rule Executor	25/01/2008 14:42:54	Complete	Confirmit ASA	VM110	
109063	johana_admin	p2704397	Rule Executor	24/01/2008 14:42:54	Complete	Confirmit ASA	VM110	
108963	johana_admin	p2704397	Community Portal Publish	22/01/2008 09:44:37	Complete	Confirmit ASA	VM109	
108958	johana_admin	p2704397	Launch Survey	22/01/2008 09:38:13	Complete	Confirmit ASA	VM109	Launch Survey
108758	nigelb	p2704397	Sampling - Execute Job	14/01/2008 09:51:53	Complete	Confirmit ASA	VM110	
108745	nigelb	p2704397	Sampling - Export Sample File	10/01/2008 11:39:52	Complete	Confirmit ASA	VM110	
108736	nigelb	p2704397	Sampling - Execute Job	10/01/2008 11:15:46	Aborted by System	Confirmit ASA	VM110	

Figure 17 Example of the task Management 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 107 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.

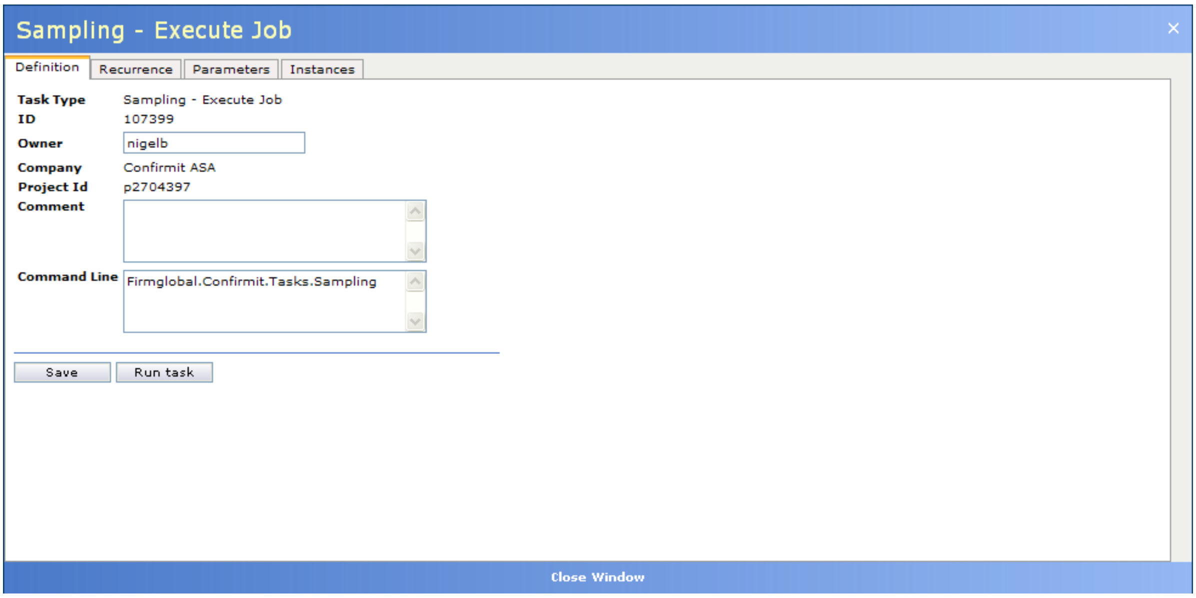


Figure 18 Example of a Task Details window

- 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.

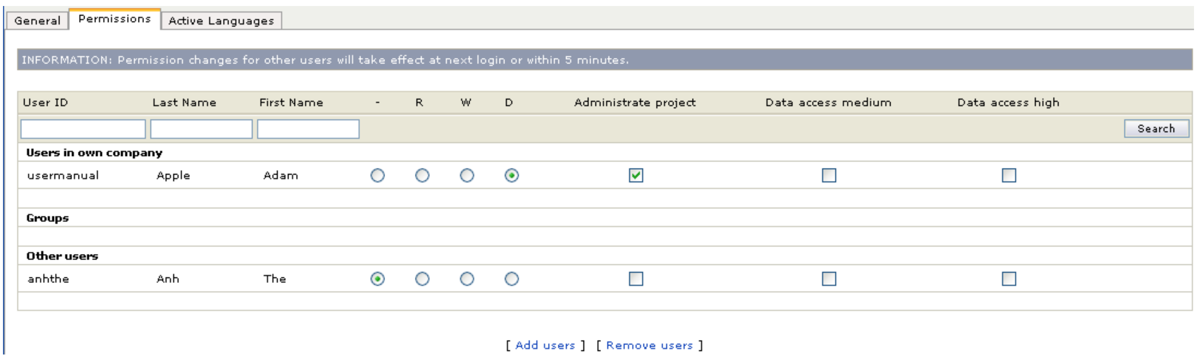


Figure 19 Example of the Permissions tab

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 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.

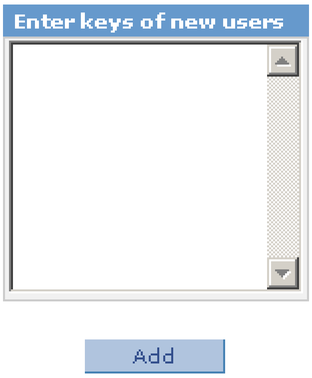


Figure 20 User Key Entry Window

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 users** button below the list.

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

Figure 21 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 7 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 9 for more information). Each user is given access permission to one of these same levels here in the Permissions tab.

- **Normal –** the default access level. Neither of the Data Access checkboxes is 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 Write Access Medium or High.
- **Data Access Medium –** the Data Access Medium checkbox is selected. The user can read all the data columns, and change data in columns that have Low or Medium Data Write Access but cannot change data in columns having Data Write Access High.

- **Data Access High –** the Data 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 14 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.

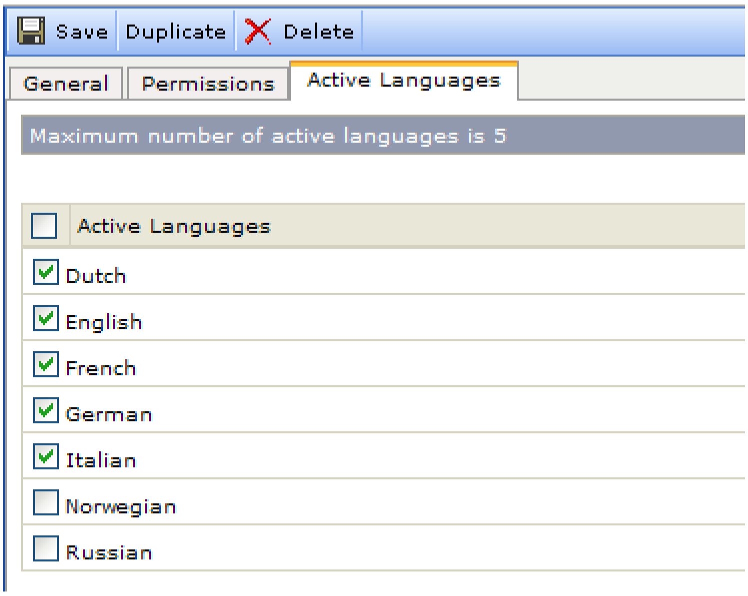


Figure 22 The Active Languages tab

The functionality on this tab is also available via the **Panel Setup > Active Languages** menu command (go to Active Languages on page 13 for more information).

5.2. 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.

5.2.1. 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 Portal List** 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 then click the button to display a drop-down menu.

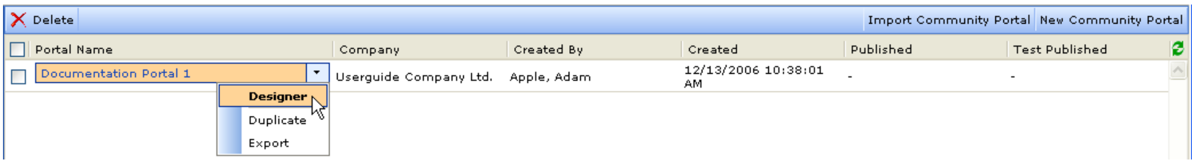


Figure 23 Accessing a Community Portal for editing

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.
- **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.

5.2.2. 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 20 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 20 for more information).

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

5.2.2.1. 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.

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

   The Properties dialog box opens.

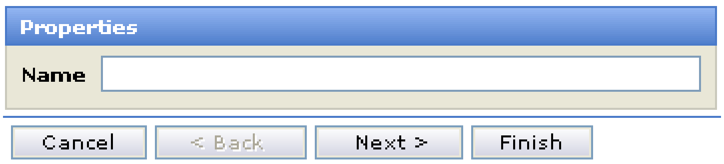


Figure 24 The Community Portals Properties dialog box

3. 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 create the portal.

4. 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.

5.2.2.2. 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 43 for more information).

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

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

   The Community Portal List page opens.

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

   The File to Upload selection dialog box opens.

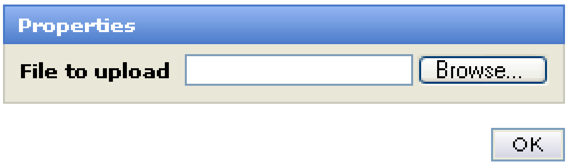


Figure 25 The File to Upload selection dialog box

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

   The portal is imported to this Panel.

5.2.3. Community Portal Languages

The Community Portal pages and texts can be made available to the respondents in any language and any number of languages.

5.2.3.1. 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.

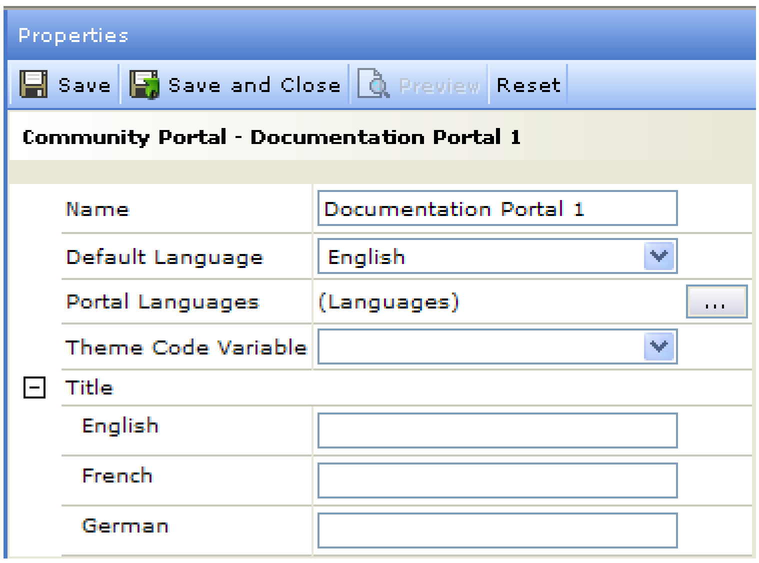


Figure 26 Example of the Properties page for a Portal

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.

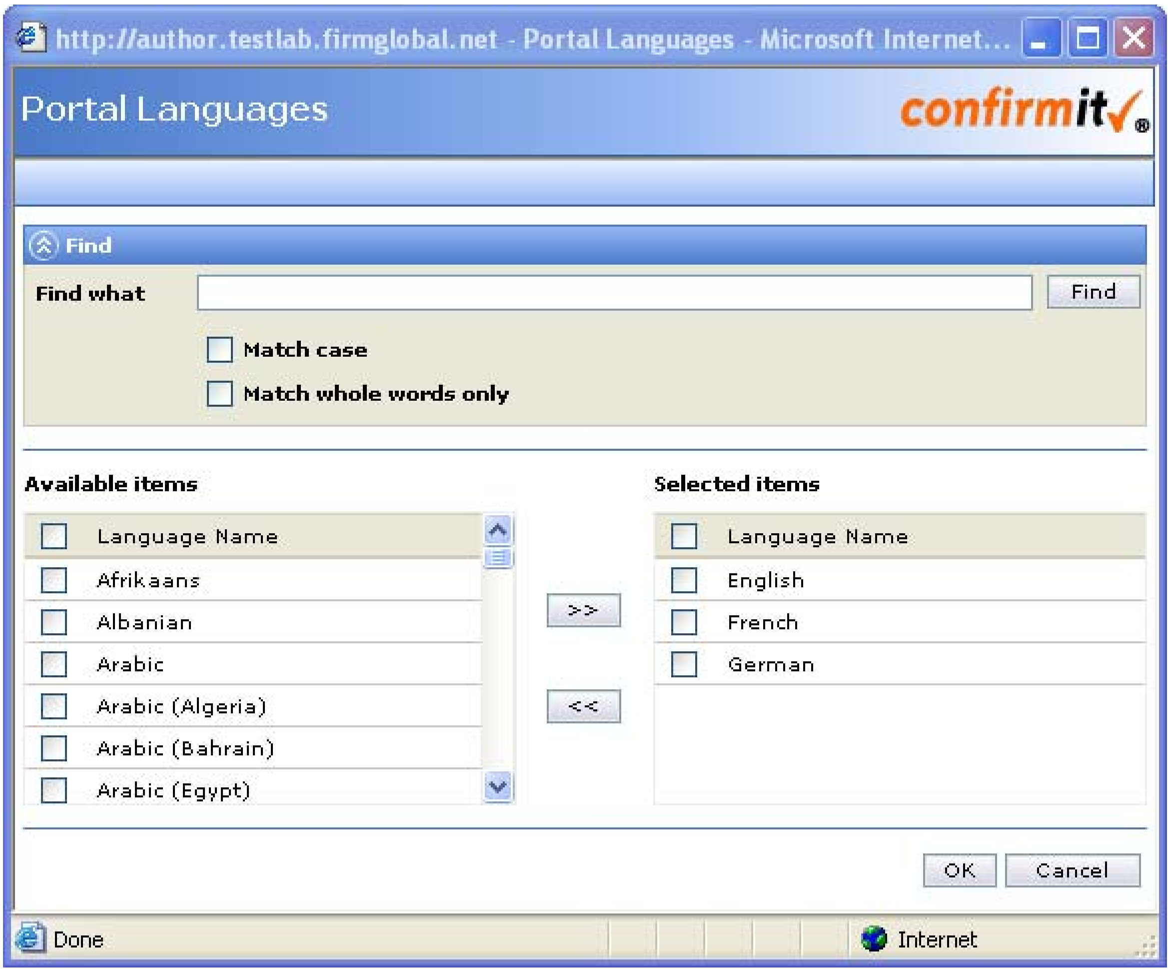


Figure 27 The Portal Languages window

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 32 for more information).

5.2.4. 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 23 for more information), Themes (go to The Themes Folder on page 24 for more information), and Pages (go to The Pages Folder on page 30 for more information). The Visual Components toolbox contains the elements that you can use on a page (go to Visual Components on page 34 for more information).

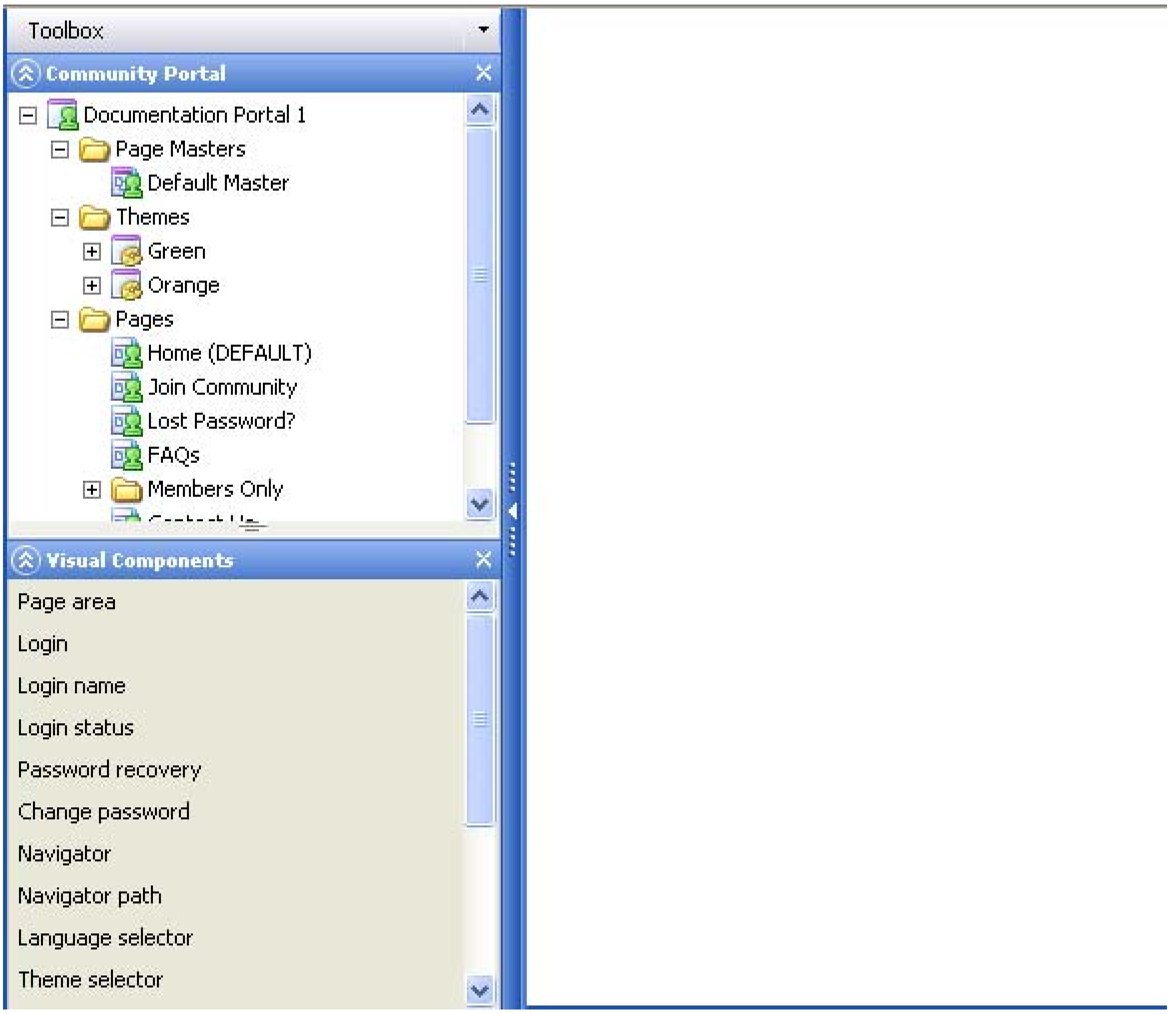


Figure 28 The Portal Designer toolboxes

In the figure above, the Community Portal toolbox contains a Page Master, two Themes and four Pages. In addition there are three pages inside the Members Only folder (only one is partially visible in the figure)(go to Folders and Structure on page 33 for more information).

5.2.4.1. 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. You can define one Page Master as the default, and this master will be applied to all pages in the Portal unless another Page Master is specified for that page. A portal page will always adopt the look-and-feel of the Page Master specified.

5.2.4.1.1. 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**.

5.2.4.1.2. 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.

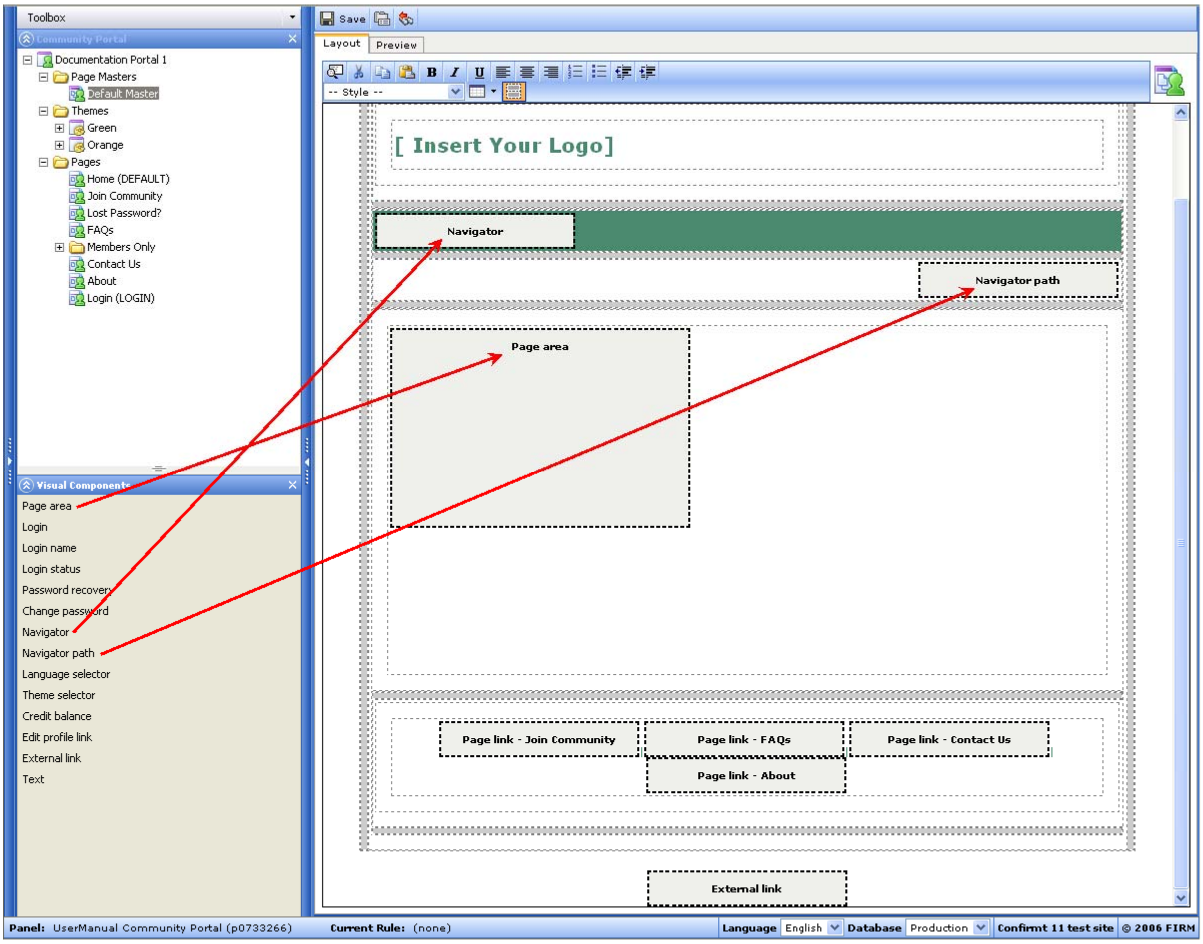


Figure 29 Example of a Page Master

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 34 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.

5.2.4.2. 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.

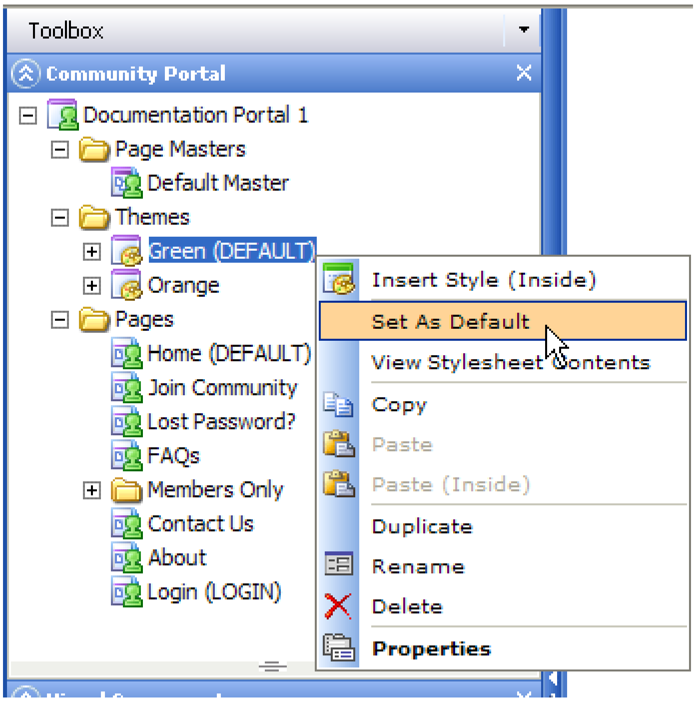


Figure 30 The default theme

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 34 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 25 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 28 for more information).

5.2.4.2.1. 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.

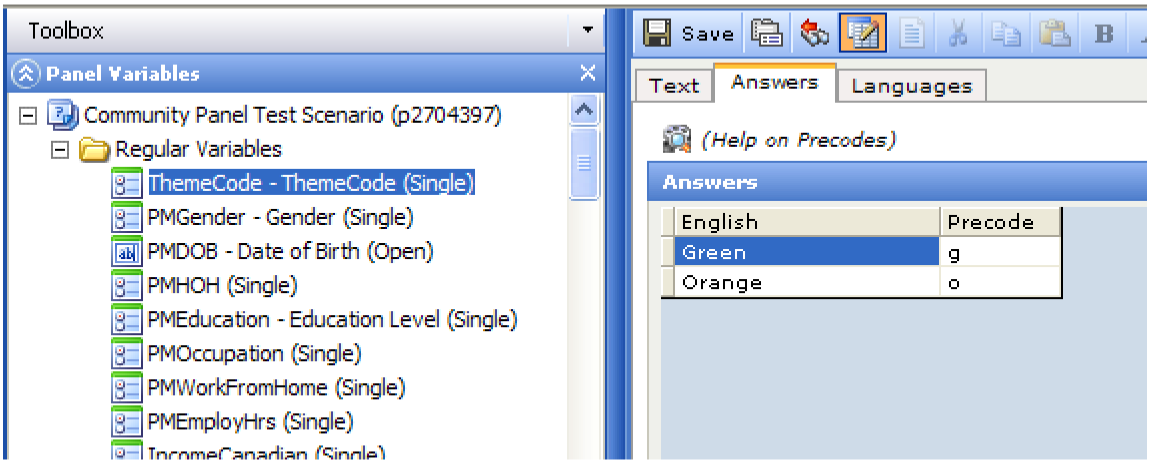


Figure 31 Example of a Single question in the panelist questionnaire to set the theme for a panelist

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.

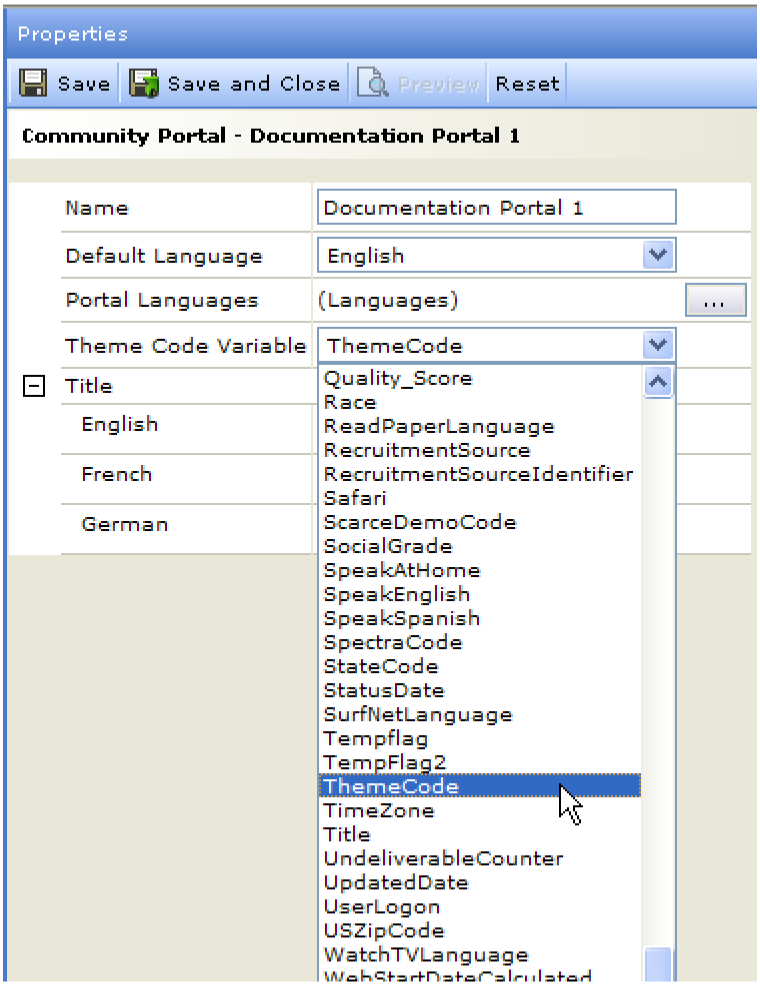


Figure 32 Selecting the Theme Code Variable property for the portal

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

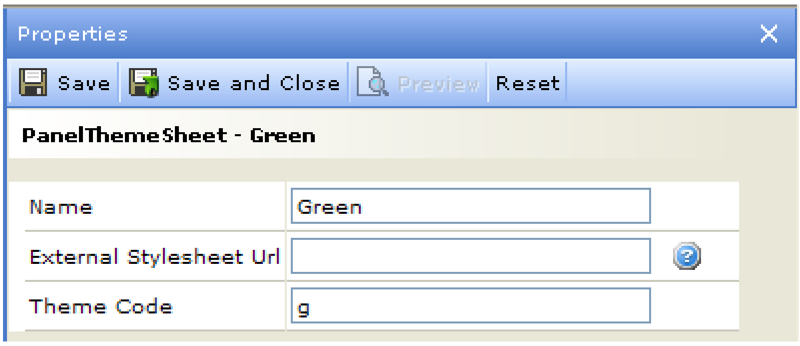


Figure 33 The Properties page for the Green theme

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.

5.2.4.2.2. 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 25 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.

5.2.4.3. 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.

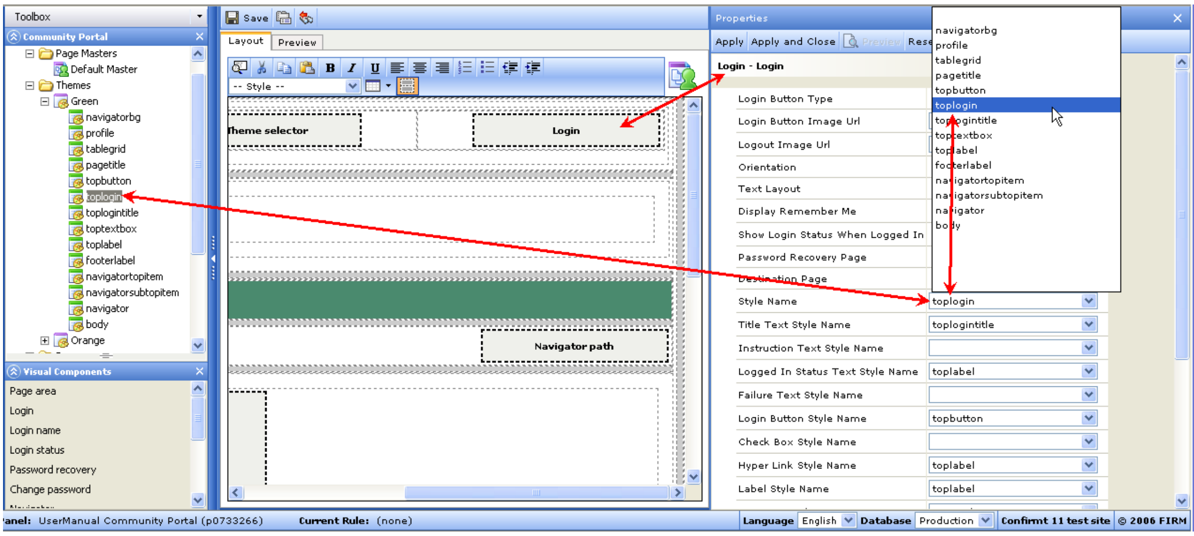


Figure 34 Applying a style for a Visual Component

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.

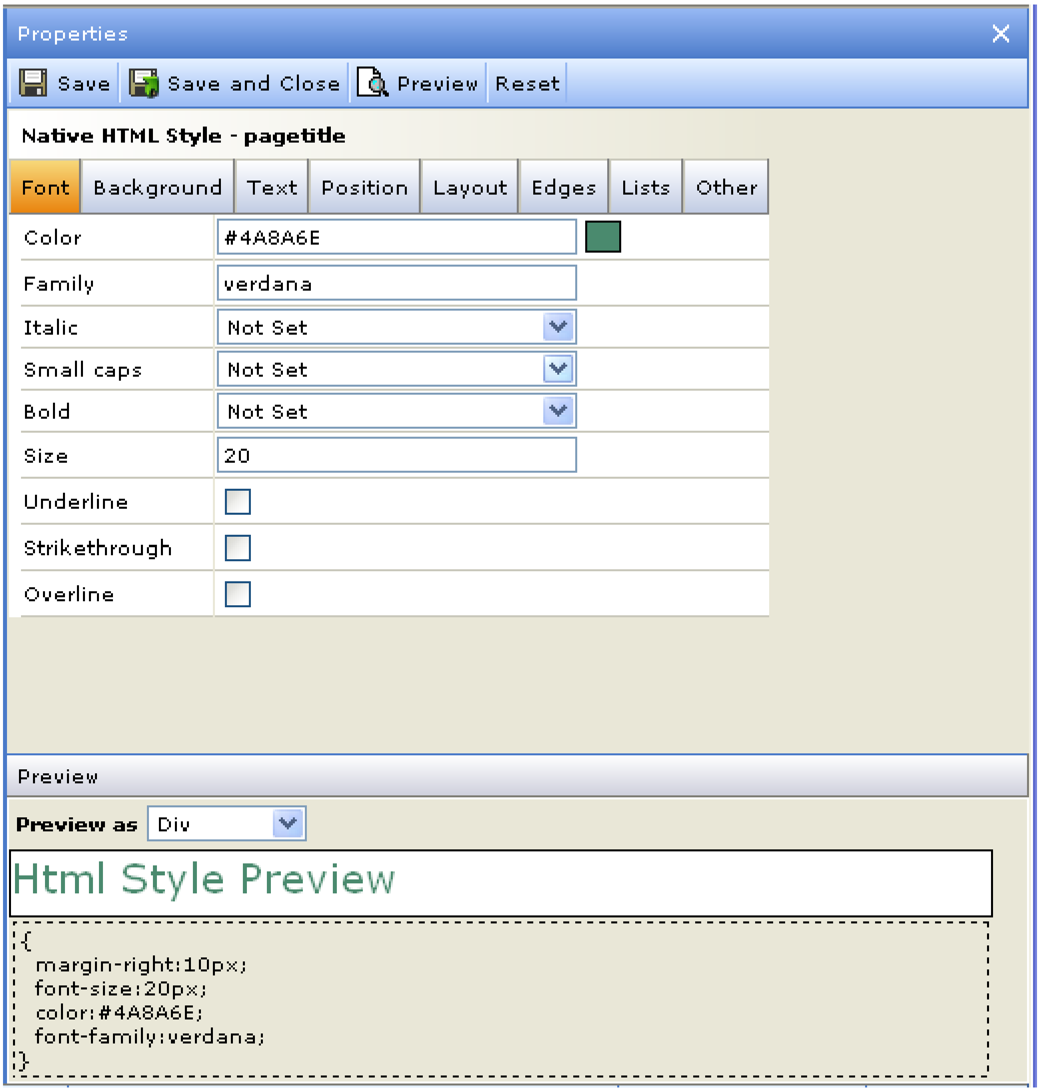


Figure 35 Style properties

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 34 for more information).

5.2.4.4. 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.

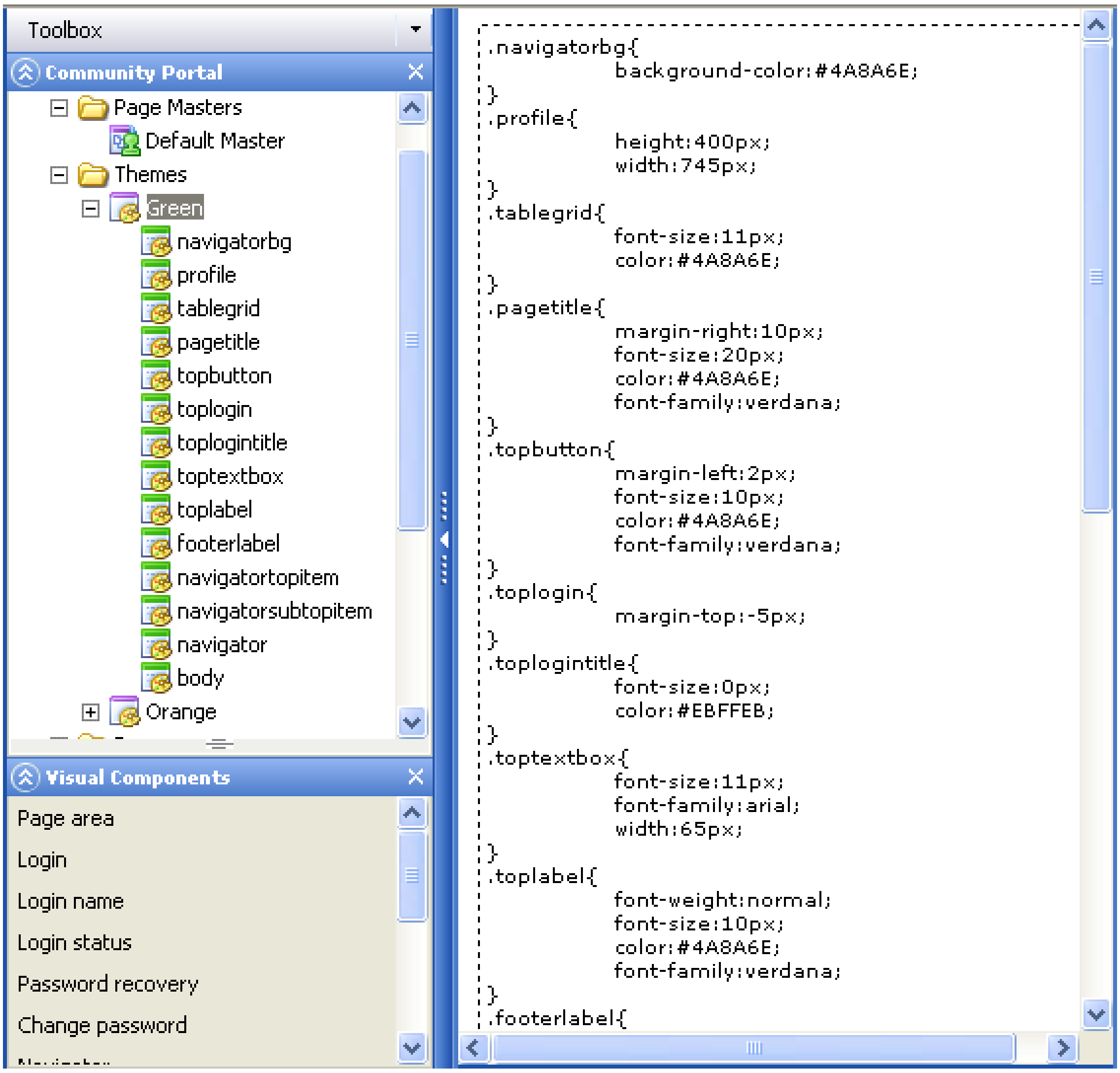


Figure 36 Viewing the Stylesheet Contents

5.2.4.5. 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.

5.2.4.5.1. 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**.

5.2.4.5.2. 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 30 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 23 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 23 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.

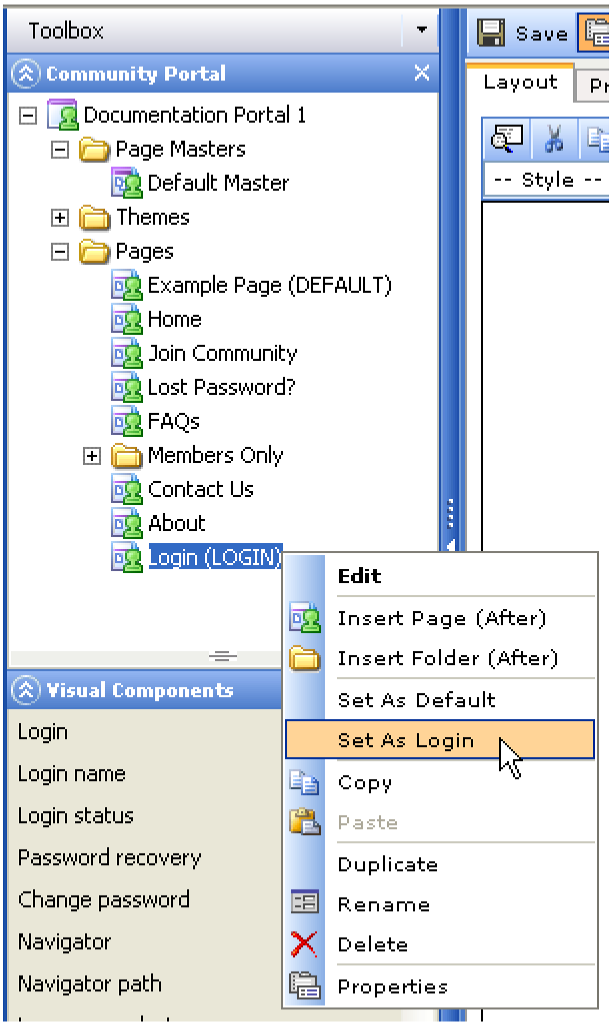


Figure 37 Setting the Login page

5.2.4.5.3. 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.

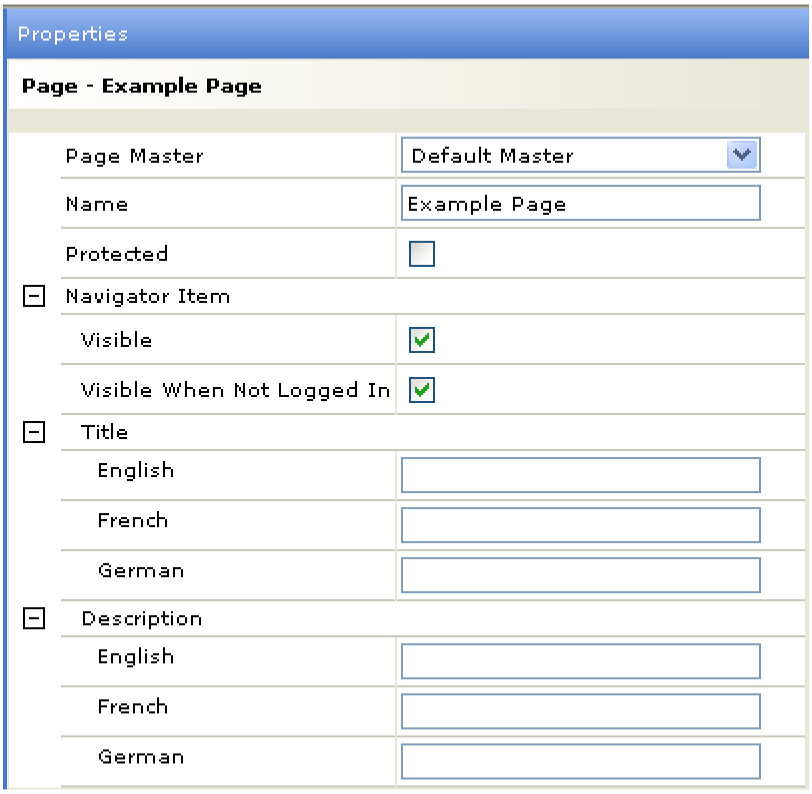


Figure 38 Example of a Page Properties page

The page properties are as follows:

- **Page Master** – defines the layout for that page (go to The Page Masters Folder on page 23 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 33 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 21 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).

5.2.4.5.4. 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.

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

In the figure below, note how the pages Example Page, Home, Join Community, FAQs, Contact Us, and About are displayed as separate pages on the menu bar. The folder "Members" 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.

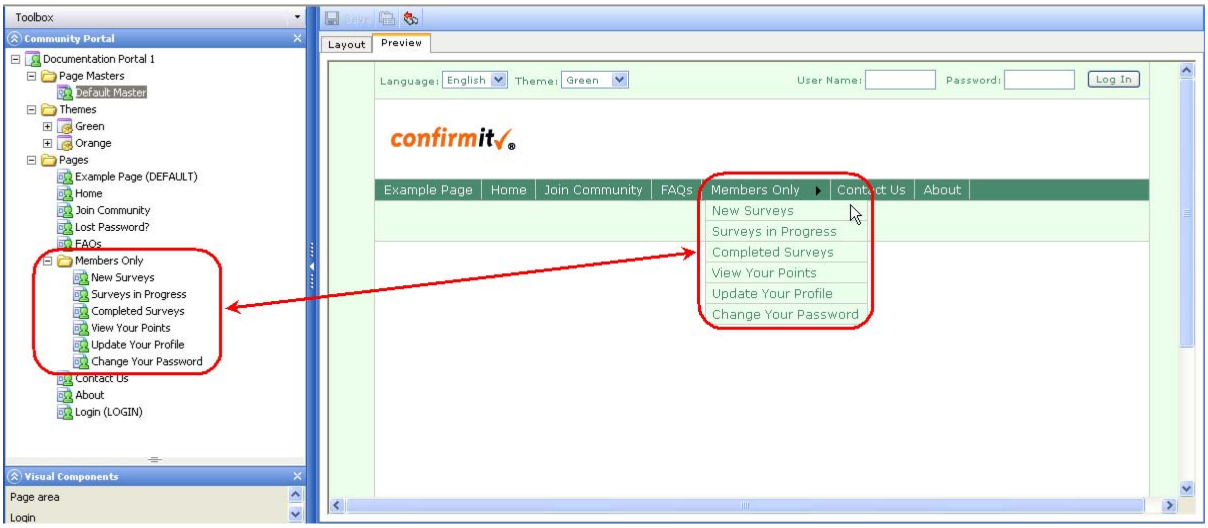


Figure 39 Using a folder to create a menu layout

5.2.4.6. 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.

5.2.4.6.1. How to Add an HTML Table to the Page

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

1. Double-click on the appropriate page in the Community Portal toolbox Pages folder, or create a new page (go to How to Create a Page Master on page 23 for more information).

   The Page Editor for the page opens.

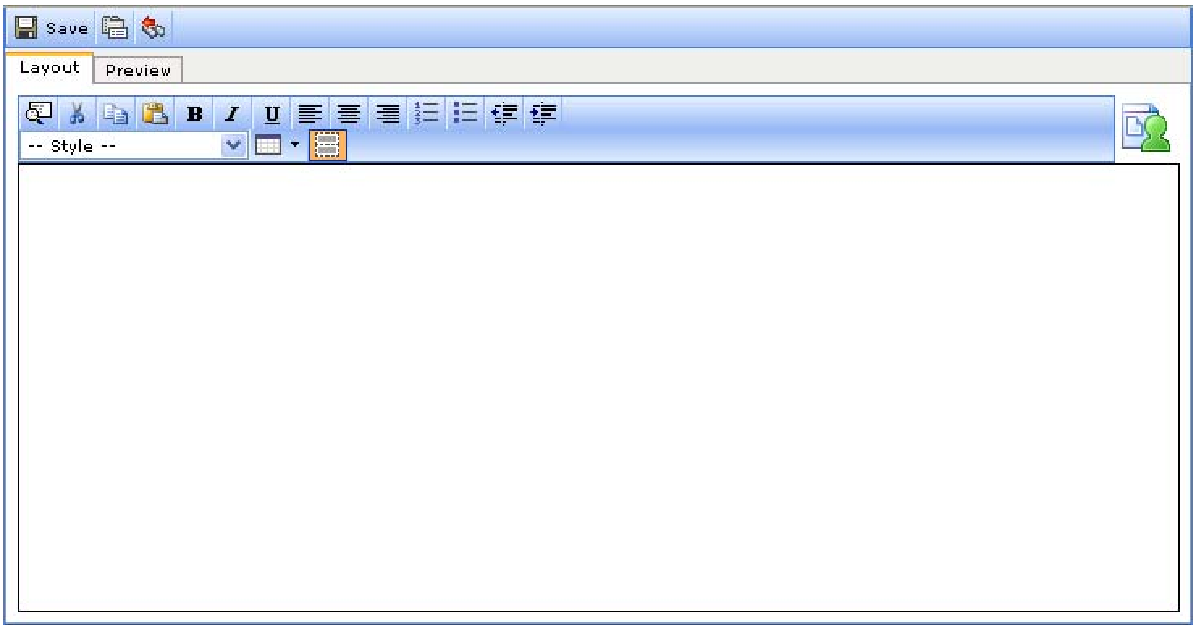
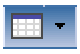


Figure 40 The blank page editor

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.

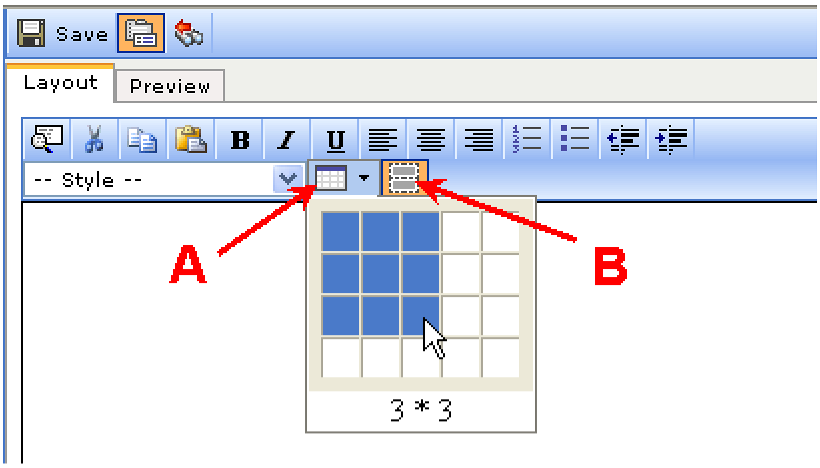


Figure 41 Creating a 3x3 HTML Table

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.

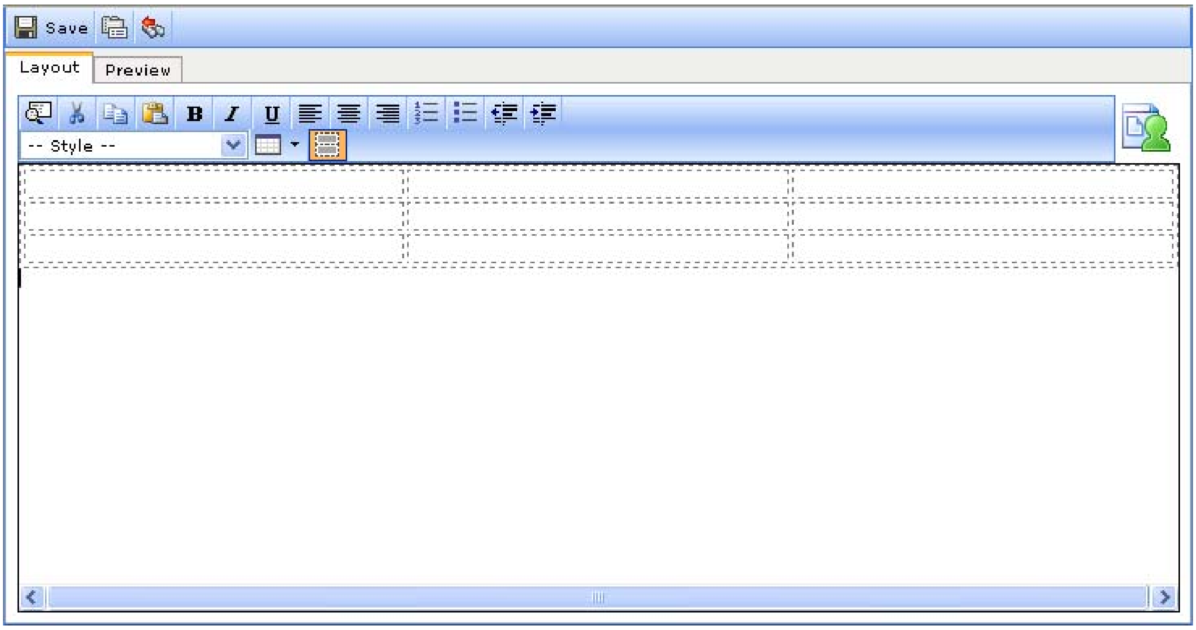


Figure 42 The resulting 3x3 table

5.2.4.6.2. 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.

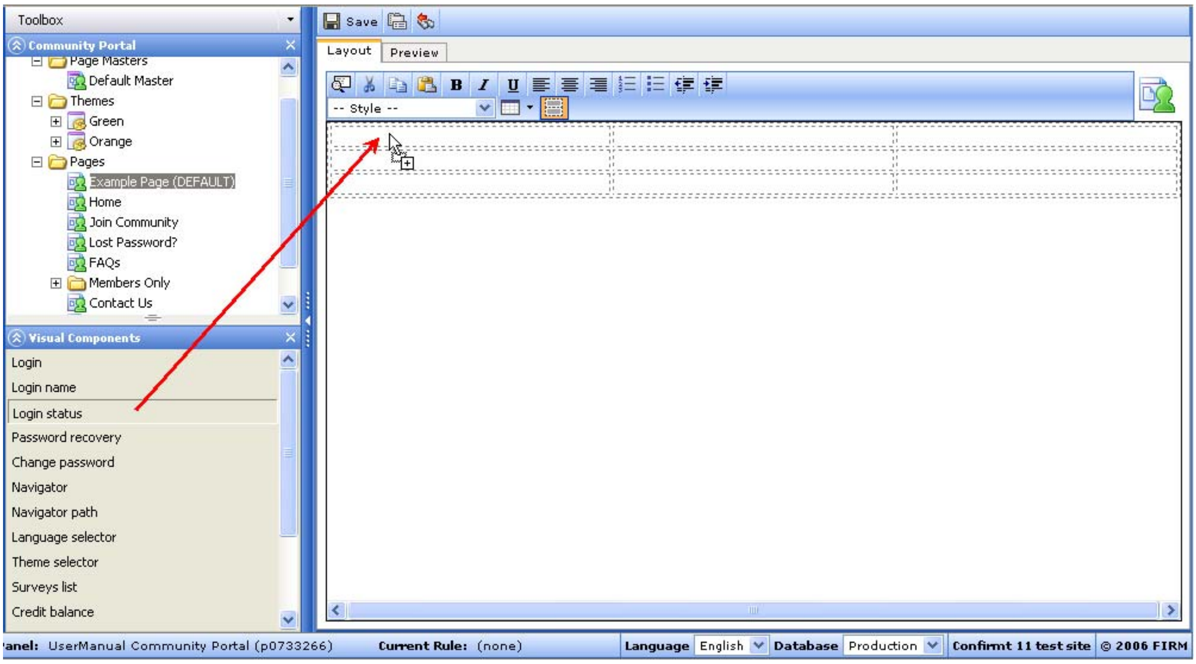


Figure 43 Dragging a Visual Component into the table

In the example, a Login Status component is being dragged into the upper-left cell of the table. On completion the Editing Page will look as shown in the figure below.

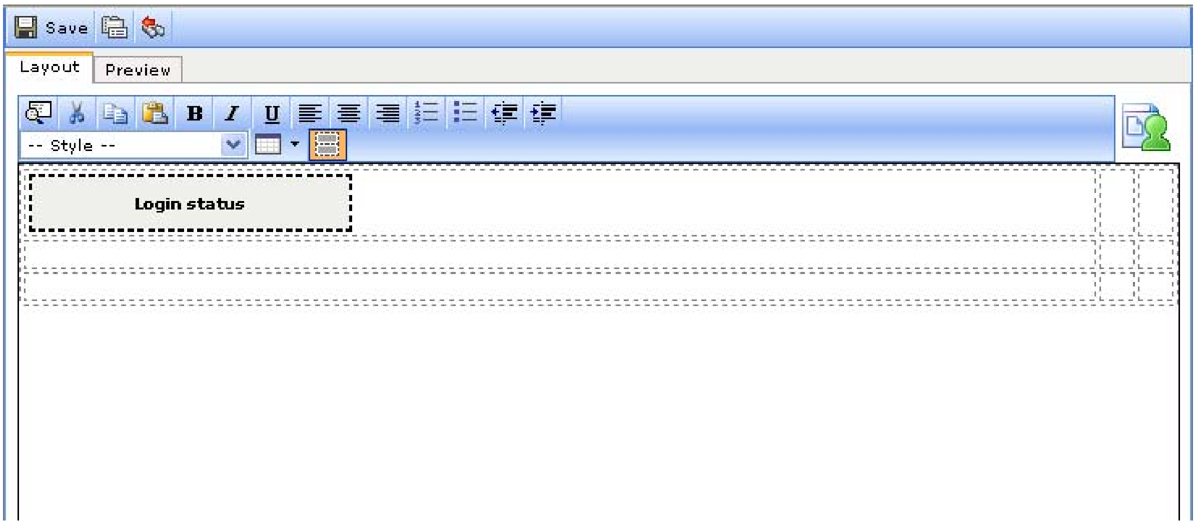


Figure 44 The table with the component in place

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.

5.2.4.7. 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.

5.2.4.7.1. 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.

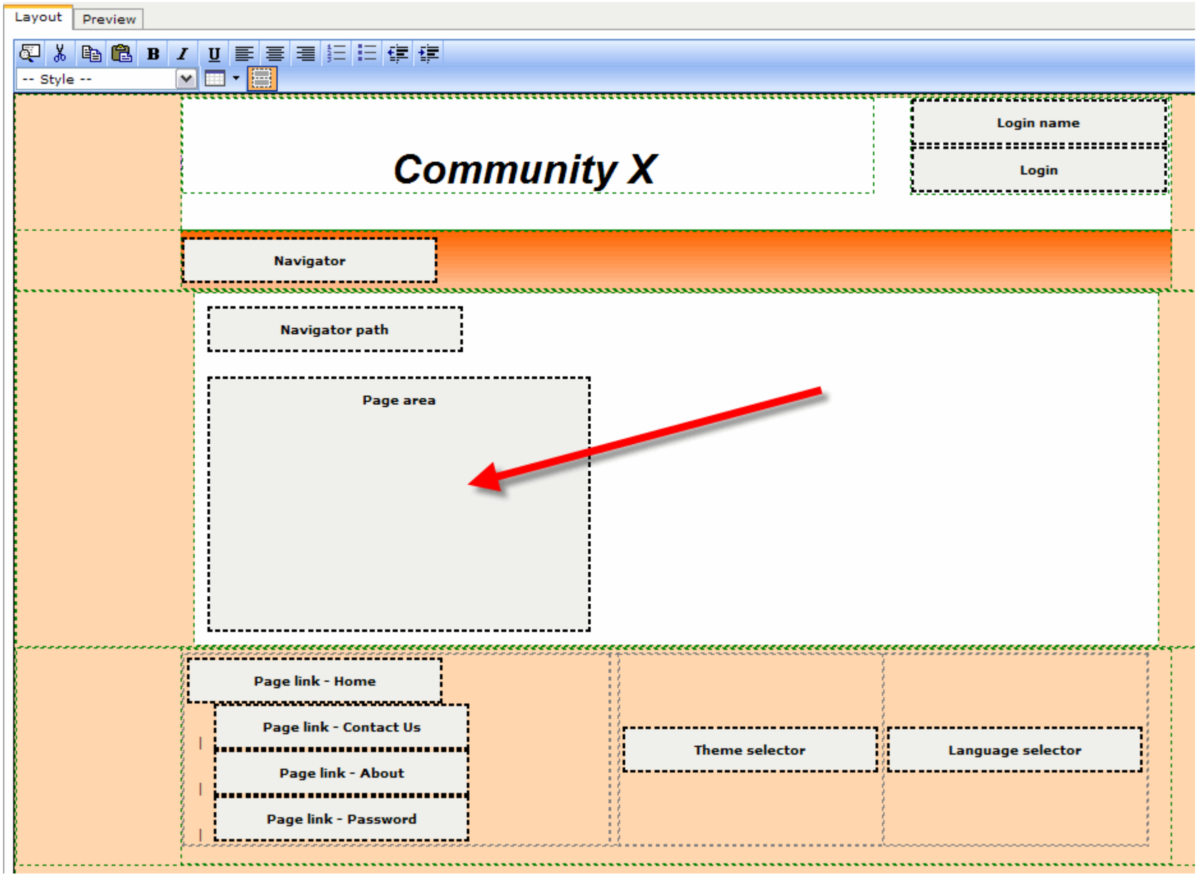


Figure 45 A Page Master with the Page Area element

5.2.4.7.2. Login

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

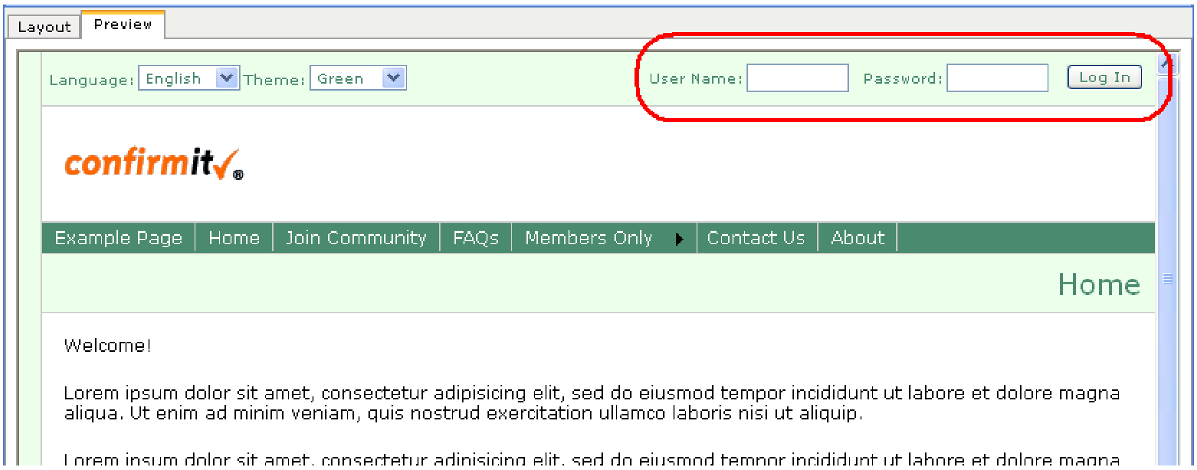


Figure 46 Example of the Login component in use

5.2.4.7.3. 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.

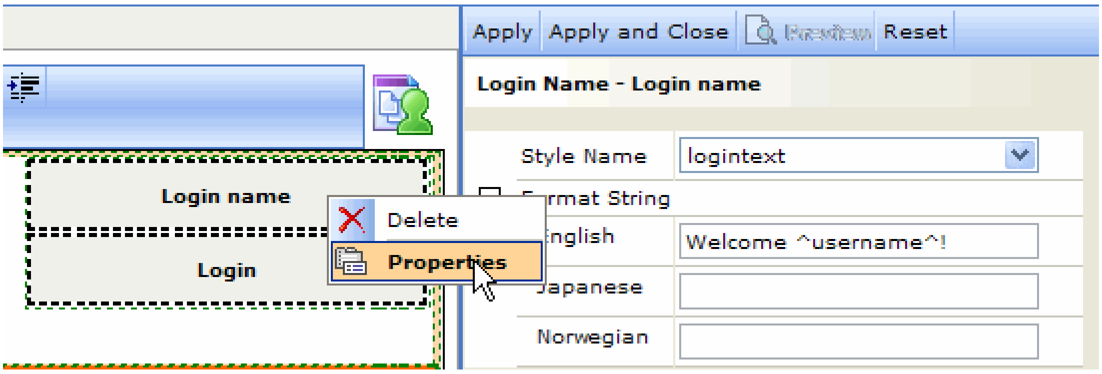


Figure 47 Setting up the Login name component

5.2.4.7.4. 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.

5.2.4.7.5. 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.

5.2.4.7.6. 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.

5.2.4.7.7. 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.

5.2.4.7.8. 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.

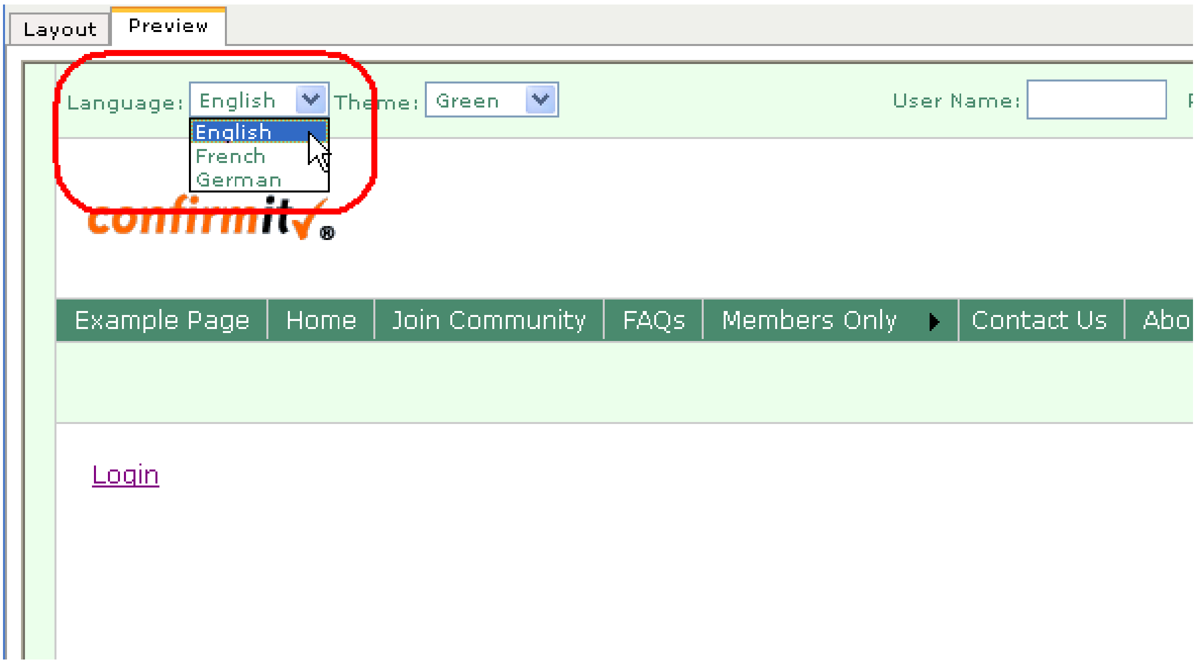


Figure 48 Example of the Language Selector in use

5.2.4.7.9. 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 24 for more information).

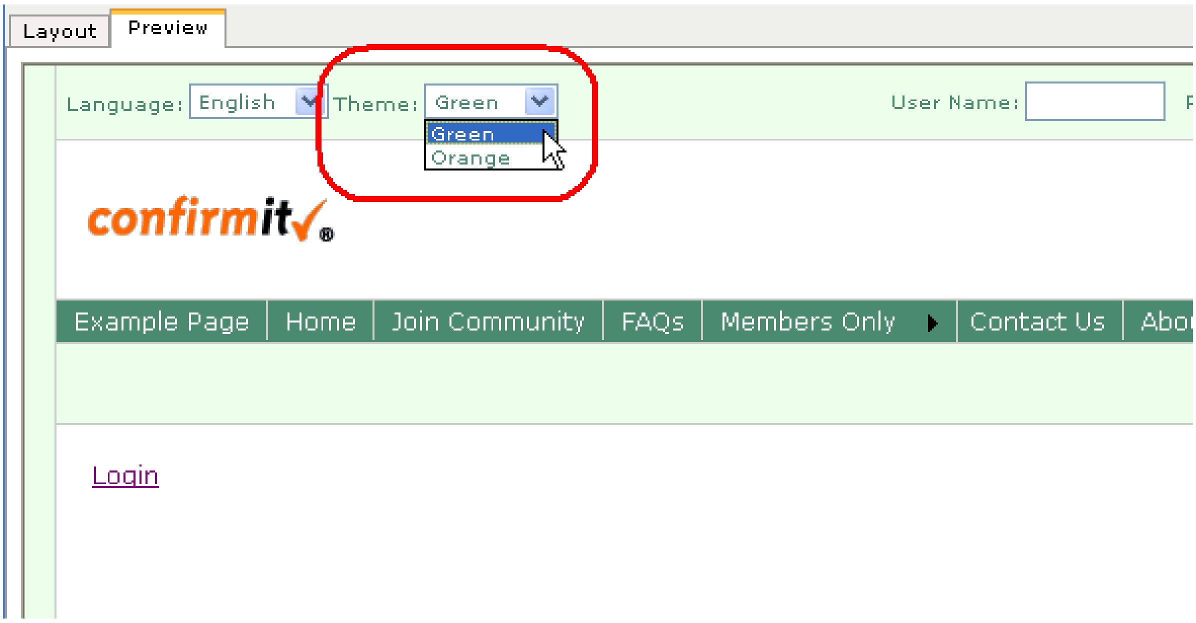


Figure 49 Example of the Theme Selector in use

5.2.4.7.10. 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.

5.2.4.7.11. 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.

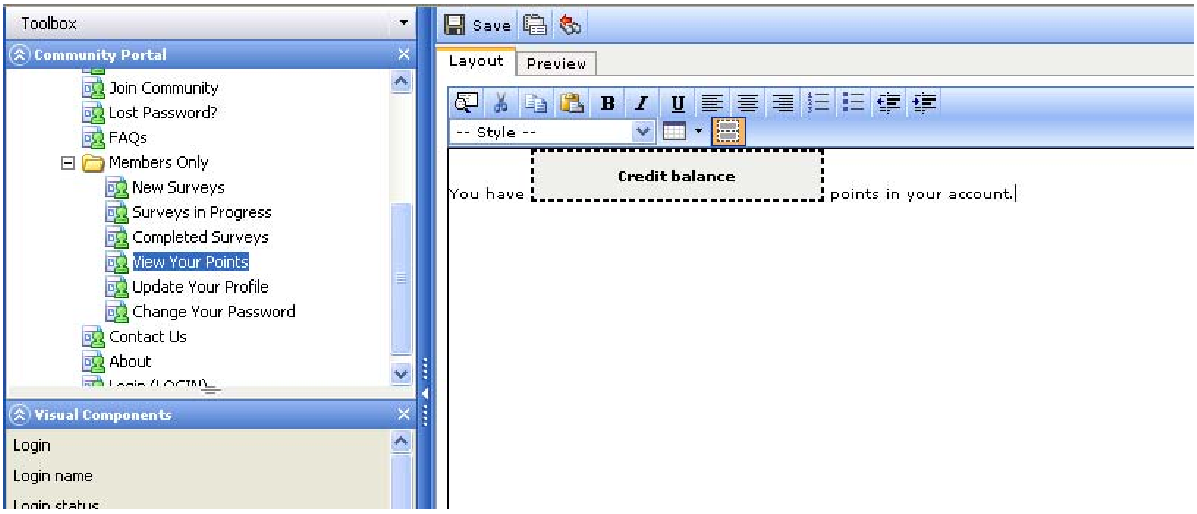


Figure 50 Example of the Credit Balance component in use

5.2.4.7.12. 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.

5.2.4.7.13. 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.

5.2.4.7.14. 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.

5.2.4.7.15. 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.

5.2.4.7.16. 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 46 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 39 for more information).

5.2.5. 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.

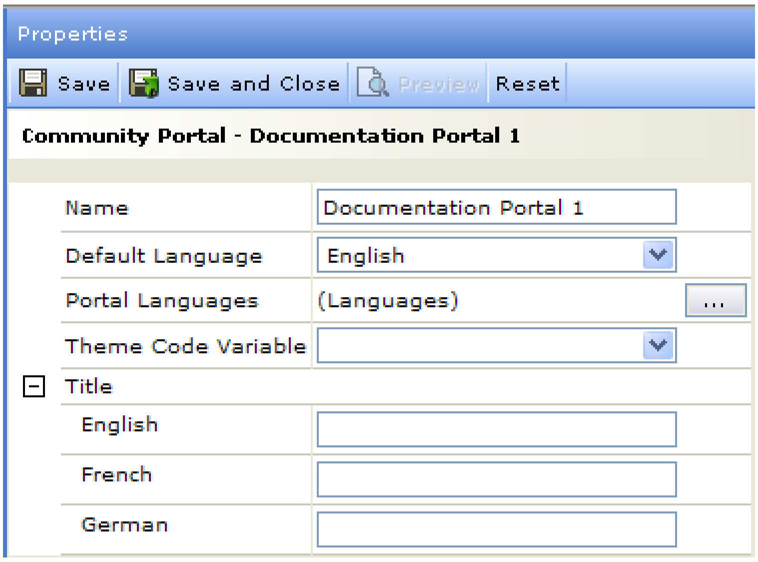


Figure 51 Setting the properties on the portal level

- 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 25 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.

5.2.5.1. 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.

5.2.5.1.1. How to Publish a Community Portal

Only one Community Portal can be published for a panel at one time. The published portal is the one used publicly for that panel. When a portal is published, the Community Portal URL becomes available from the **Project Management page > Overview tab**. If another portal is published for the active panel, the new portal will override the old portal.

Changes you make to the Community Portal only become public once the portal is published.

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.

5.2.5.1.2. 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.

5.2.5.1.3. 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.

5.2.5.1.4. 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 43 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.

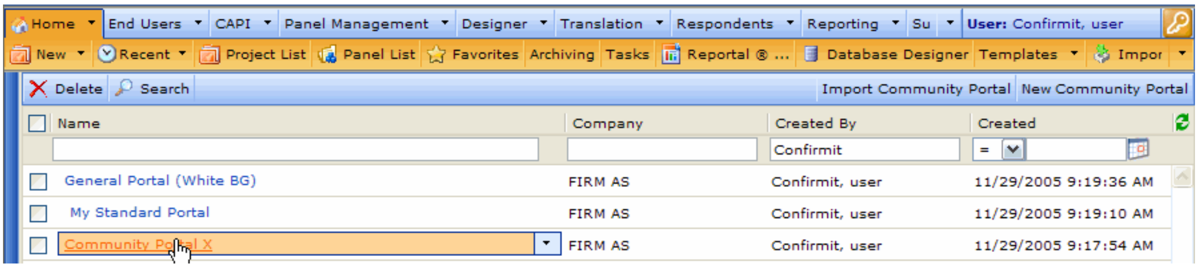


Figure 52 Example of a Community Portal template list

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.

5.2.5.1.5. 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.

5.2.5.1.6. 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.

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

   The Properties dialog opens.

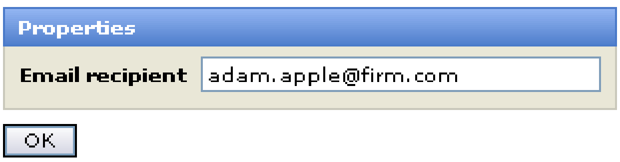


Figure 53 The Properties dialog when exporting a portal

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

The Task page is displayed, showing a progress bar, the task ID and the status. On completion, the progress bar is at 100% and an **OK** button appears. An email is sent to the specified recipient, with the compressed XML file attached. The recipient can then save and de-compress the file, then import it into the server (go to How to Import a Community Portal on page 20 for more information).

5.2.5.2. 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 34 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 28 for more information).

5.2.5.2.1. 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.

5.2.5.2.2. 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.

5.2.5.2.3. Table Properties

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

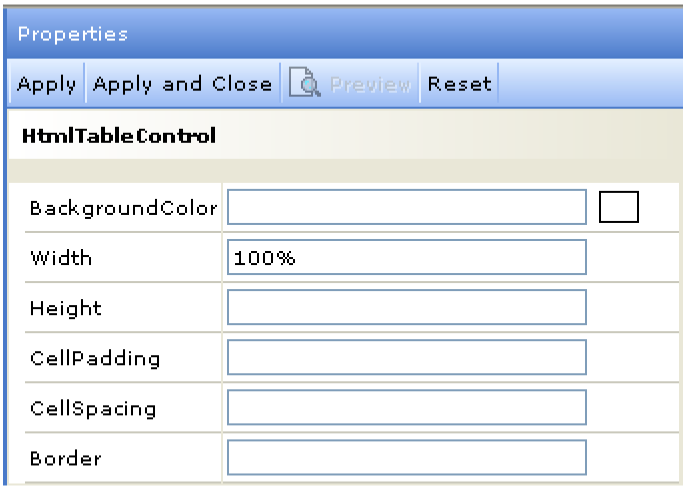


Figure 54 The Table Properties page

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

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

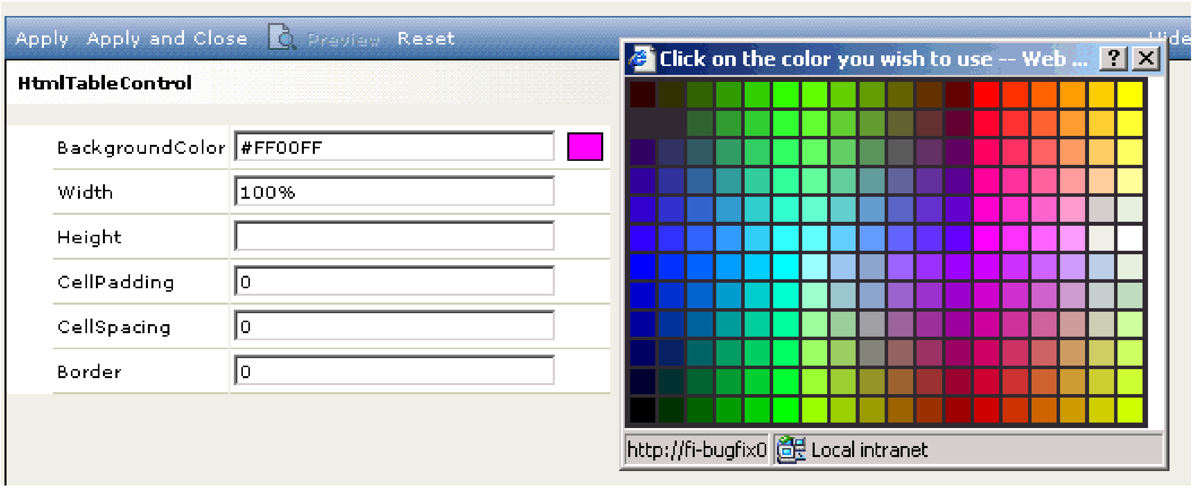


Figure 55 Editing the background color

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.

5.2.5.2.4. Cell Properties

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

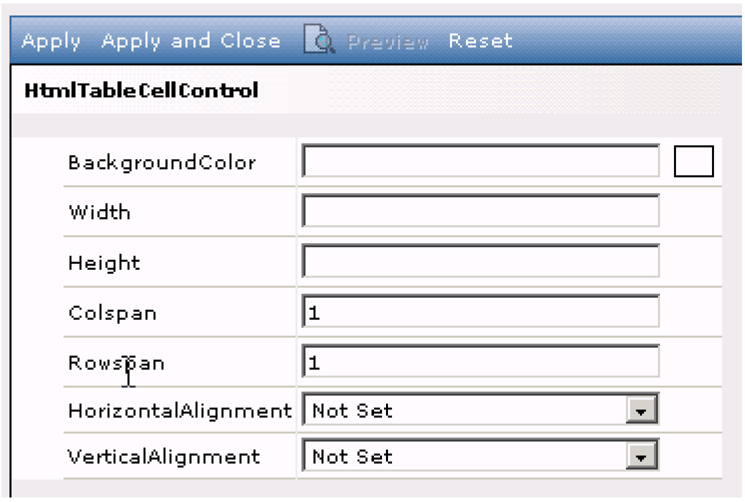


Figure 56 Cell properties

Here you can change the **background color, width** and **height**(go to Table Properties on page 44 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.

5.2.5.2.5. 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.

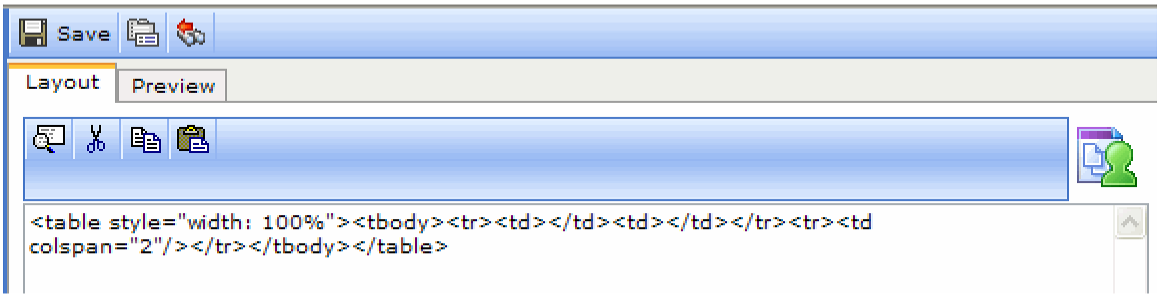


Figure 57 Example of the HTML editing mode

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

5.2.5.2.6. 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.**

5.2.5.2.7. Images

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

If you are in HTML mode (go to HTML Mode on page 46 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.

5.3. 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.

5.3.1. 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 58 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.

5.3.2. The Activity Logs Tab

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

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

Overview | Activity Logs

Status All

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

Figure 59 Example of the Activity Log tab

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

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

- **Status –** the status of the activity. This can be:
  - **All –** shows all activities.

- 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.

5.3.3. 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.

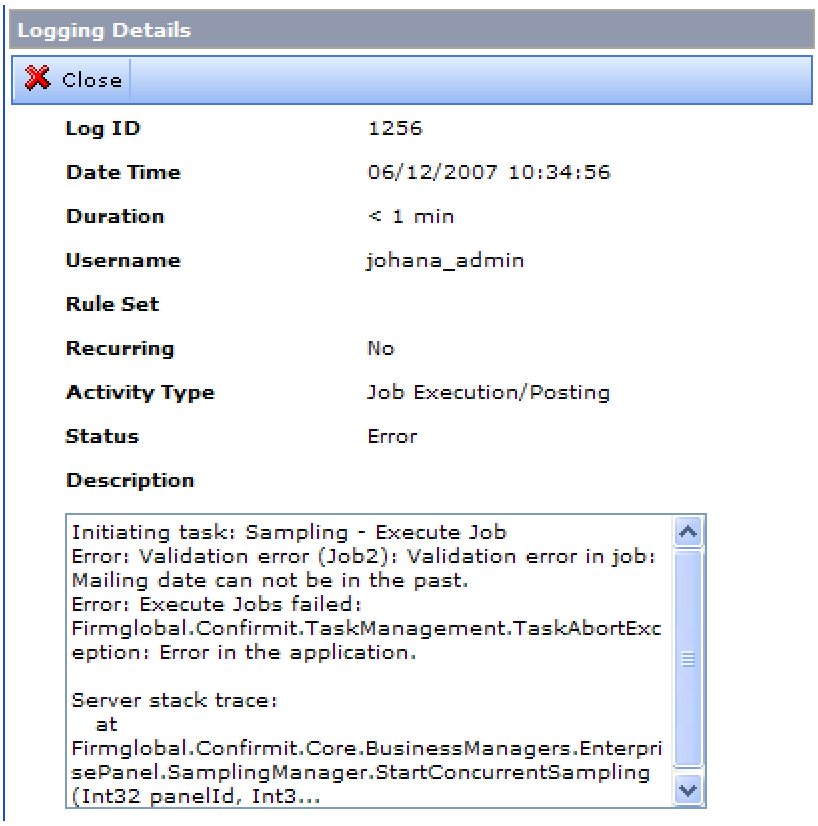


Figure 60 Example of the Logging Details page

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

5.4. 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 8 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.

5.5. Survey Synchronization

The Survey Synchronization function 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.

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.

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

   The dialog shown in the figure below opens.

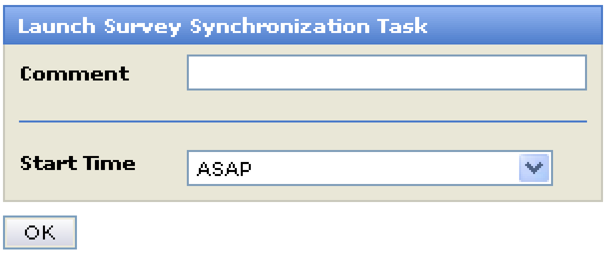


Figure 61 The Launch Survey Synchronization Task dialog

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.
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 141 for more information).

5.5.1. 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 62 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.

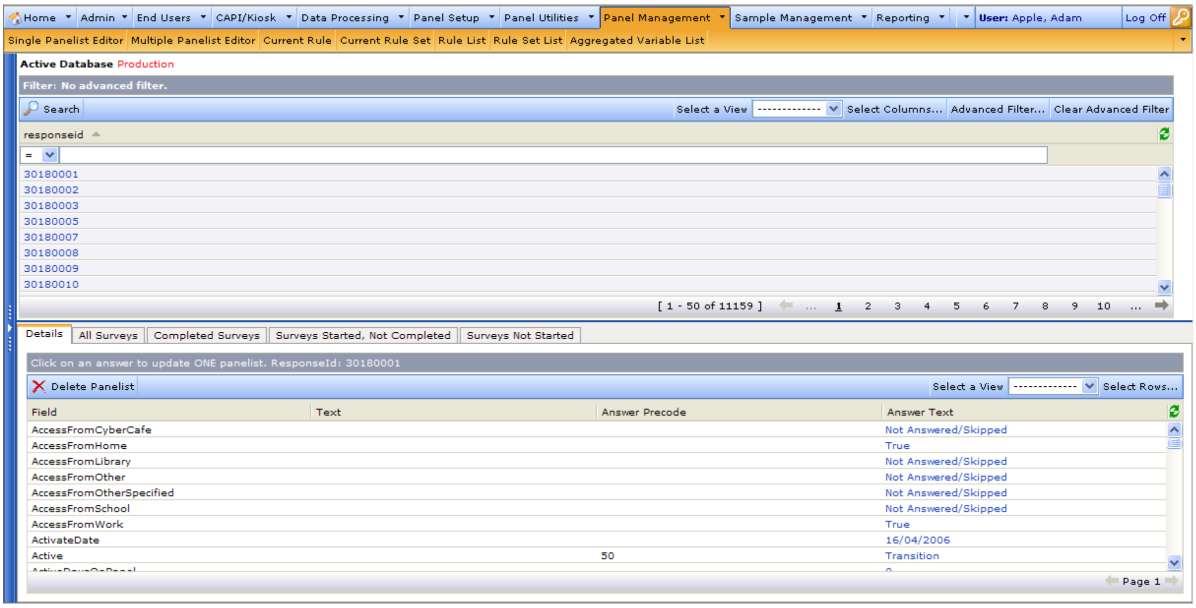


Figure 63 Example of a panelist list in the Edit window

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 52 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.

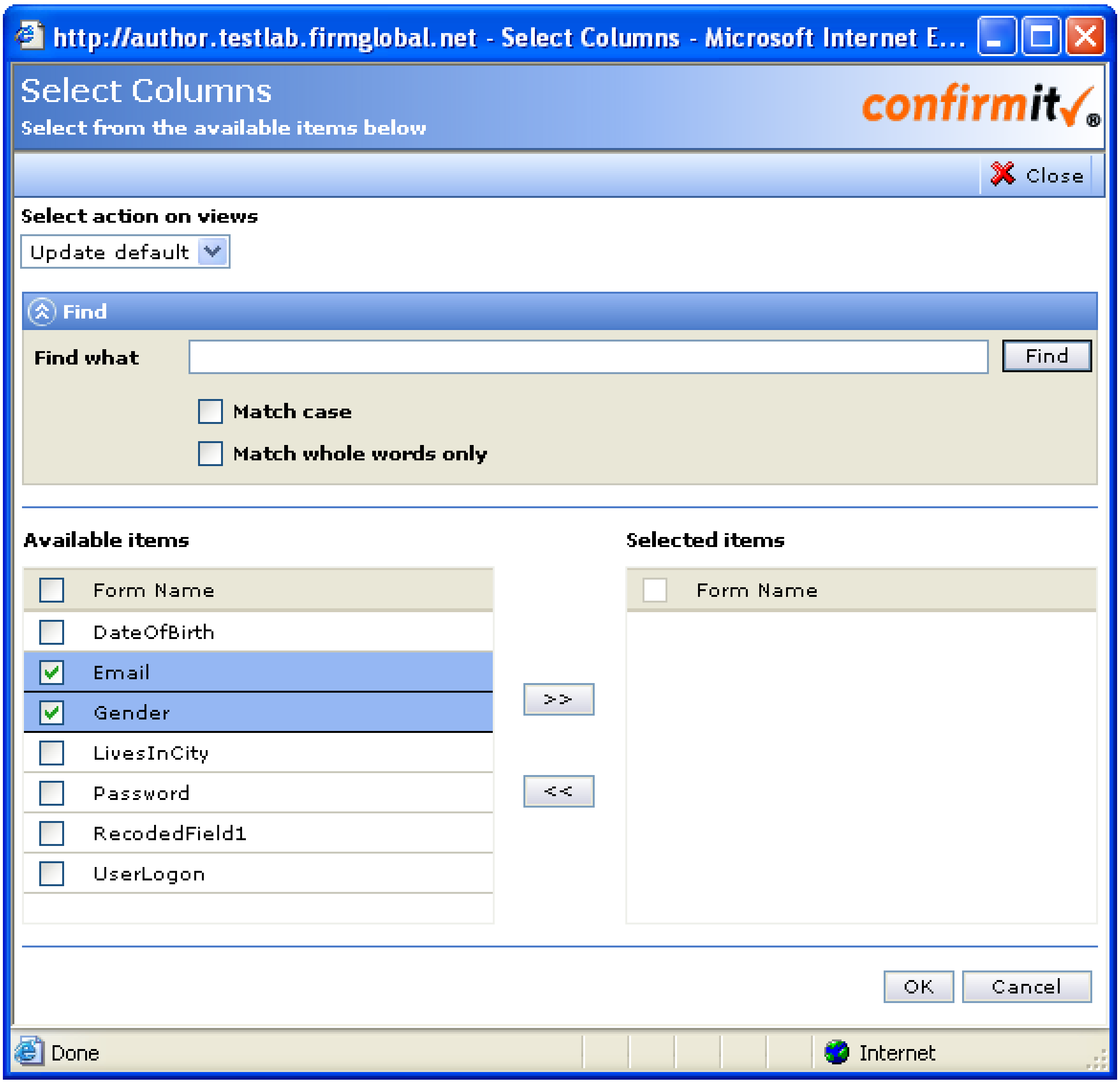


Figure 64 Example of the Select Columns window

To select columns:

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

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

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

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

6.1.3. 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.

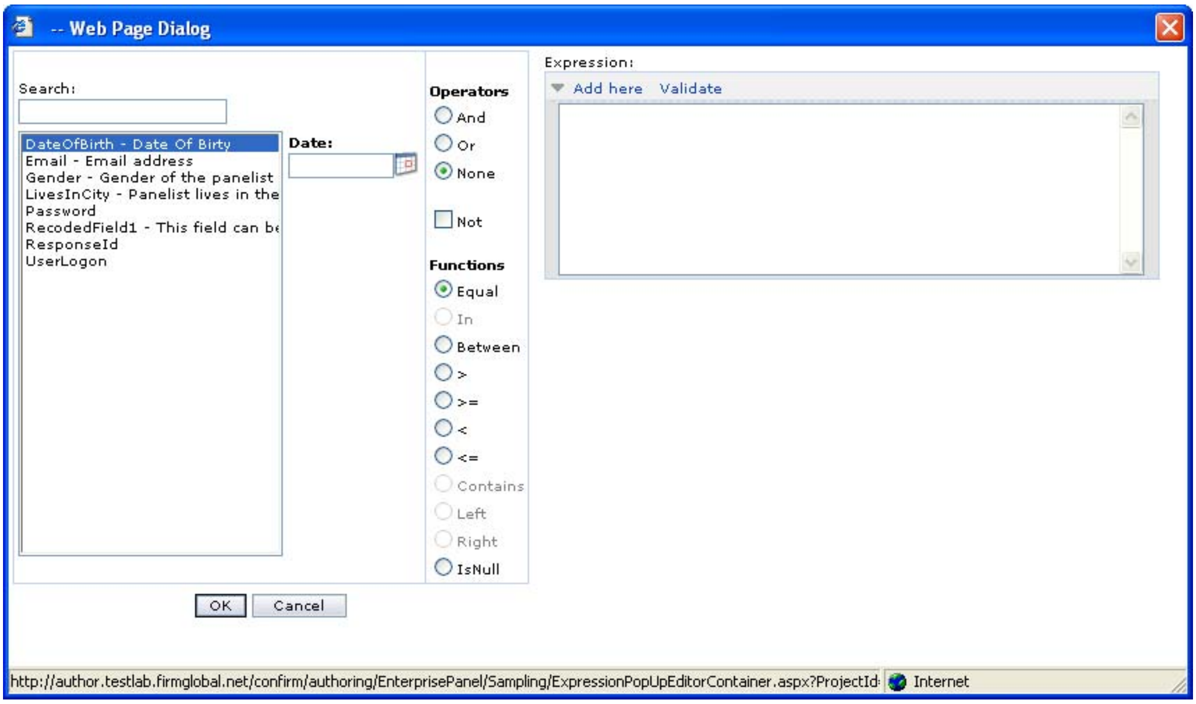


Figure 65 Example of the Advanced Filter window

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.

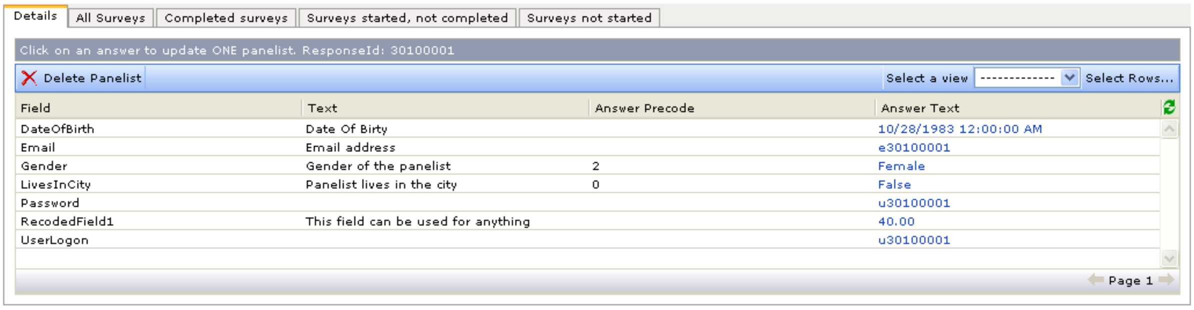


Figure 66 Example of the Details tab for a selected panelist

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

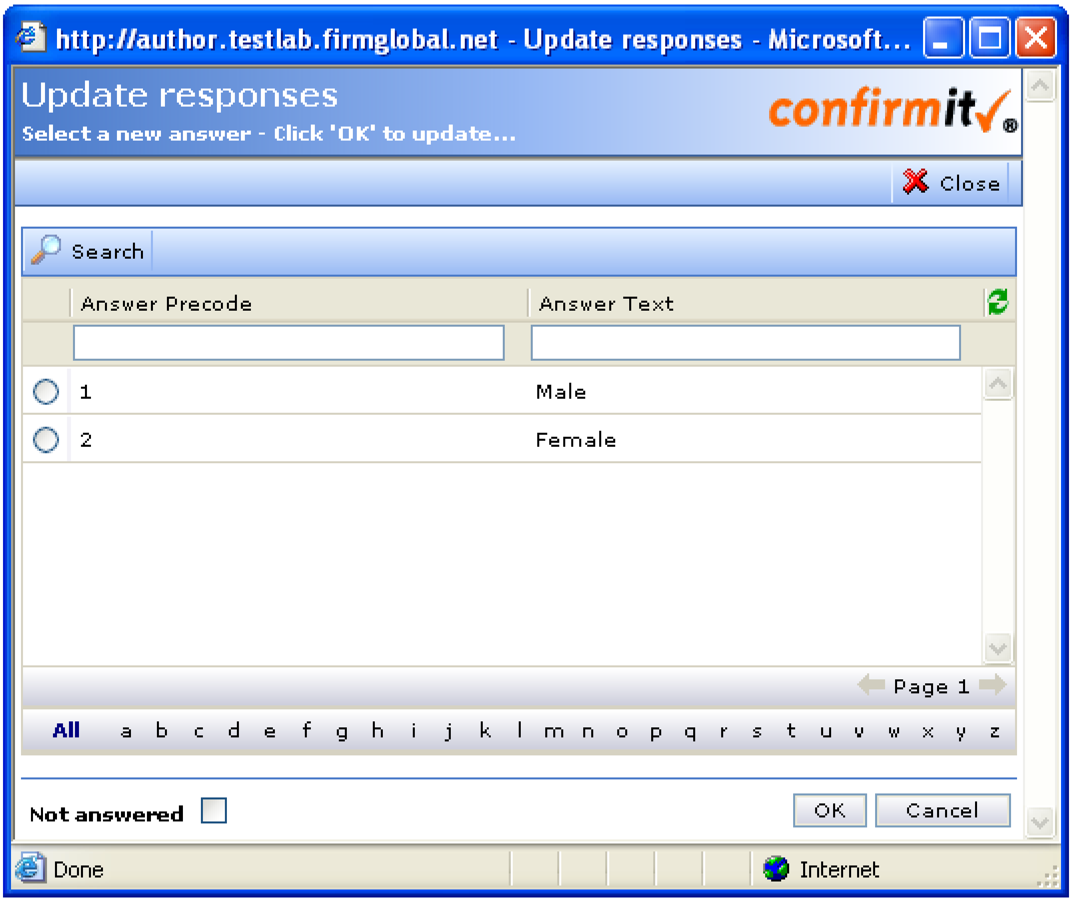


Figure 67 Example of a panelist details editing window

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.

6.1.5.3. The Completed Surveys Tab

This tab lists all the surveys the selected panelist has completed.

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. A link to the survey is 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.

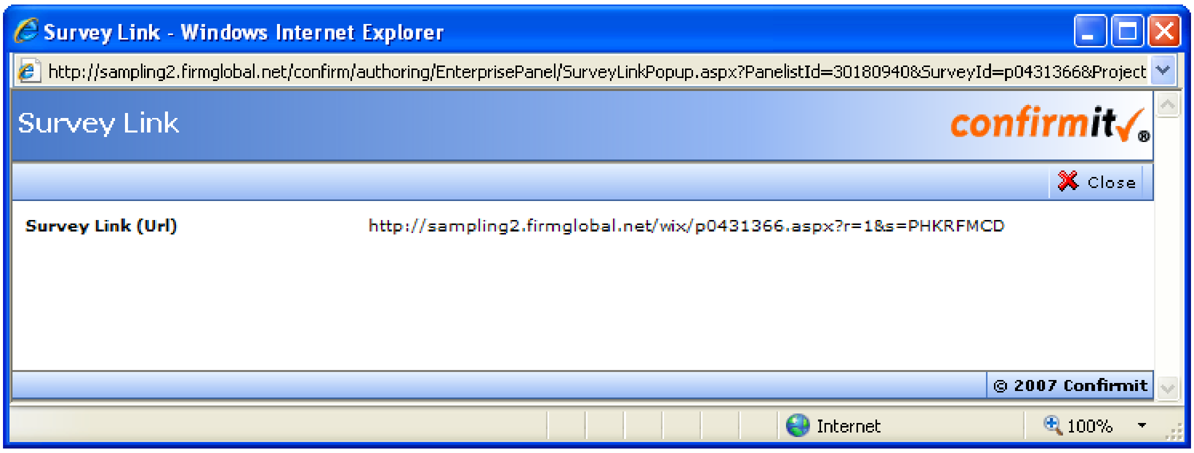


Figure 68 Example of the Survey Link window

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.

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.

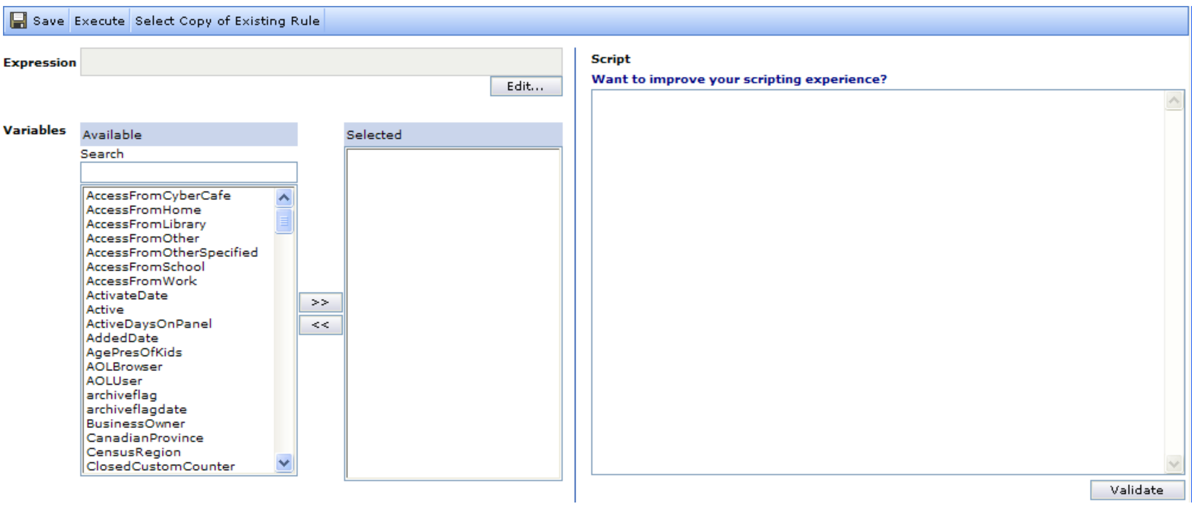


Figure 69 Example of the Multiple Panelist Editor page

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 57 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.

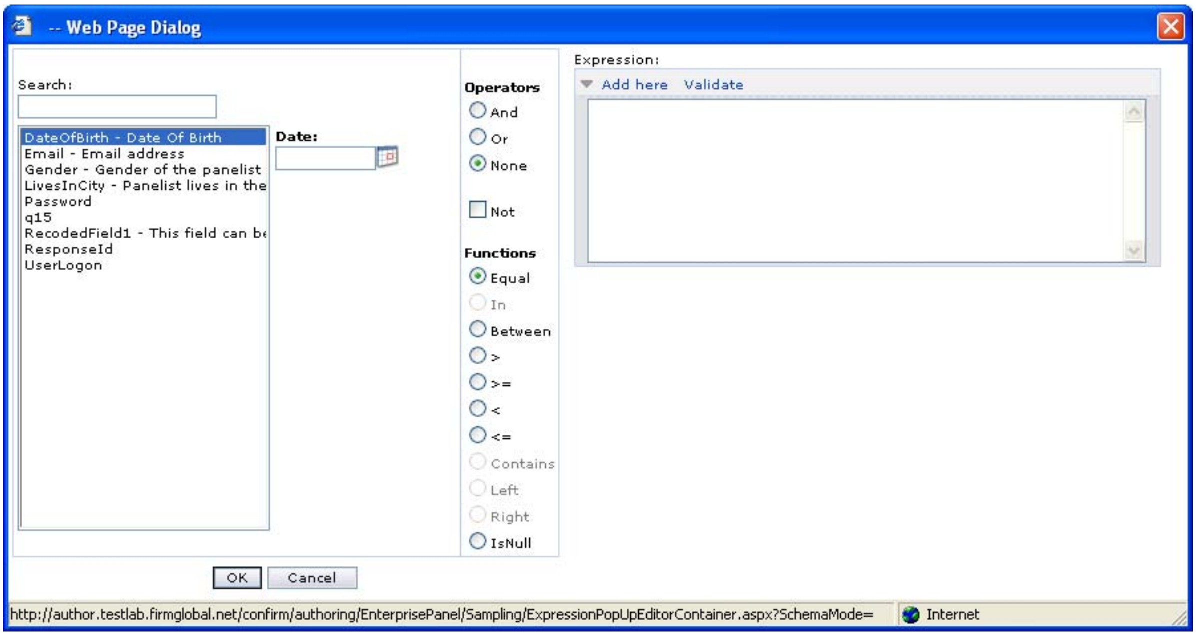


Figure 70 Example of the Expression Editor window

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

Note: If you have the necessary knowledge/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.

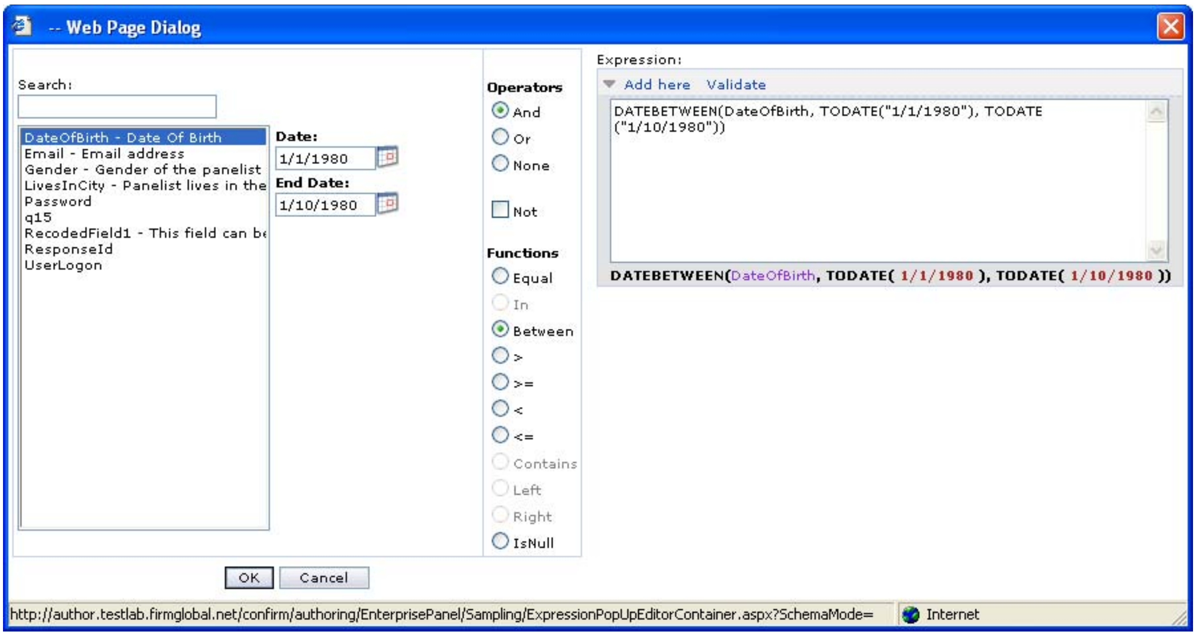


Figure 71 Example of an expression under construction

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.

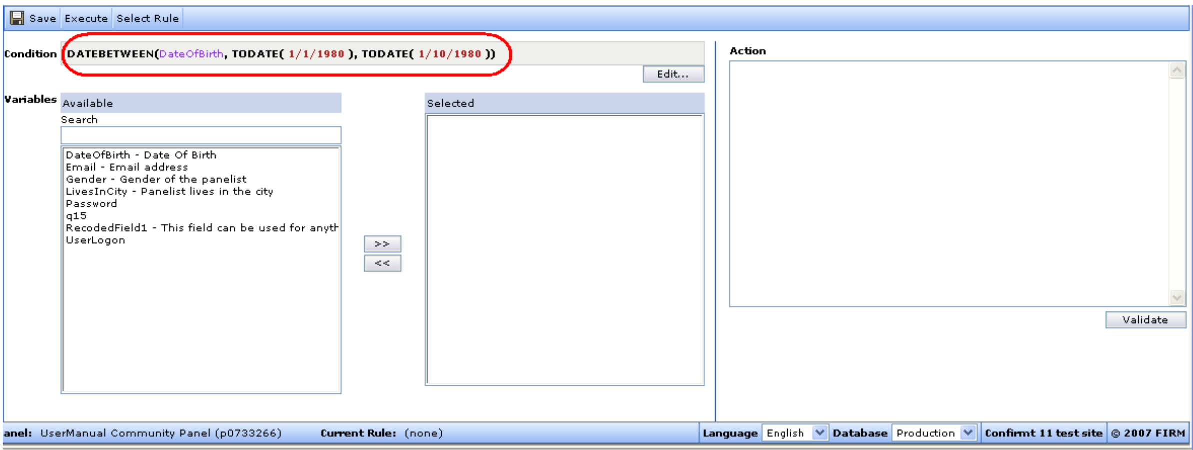


Figure 72 The Panelist Editor with the condition

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 57 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 73 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 73 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 and set the Status. The remaining information cannot be edited.

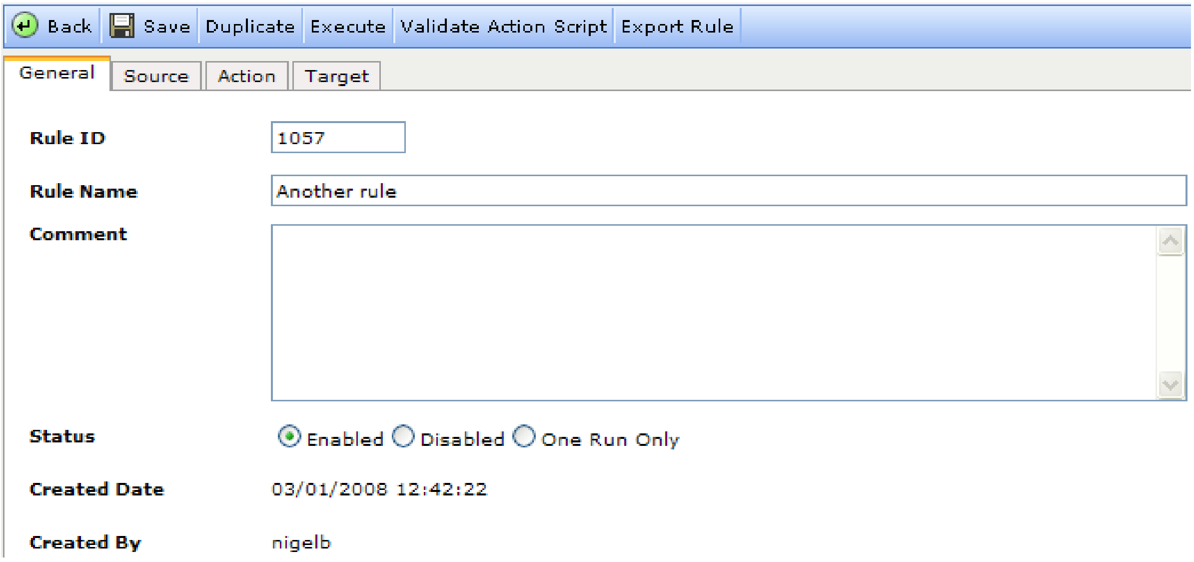


Figure 74 Example of the Rule Details > General tab

- **Status –** select the required status for the rule. The options are:
    - **Enabled –** select to allow the rule to be run "as required". This is the default setting.
    - **Disabled –** select this option if you wish to prevent the rule from being run. This could be useful if you have a recurring task, and wish to stop using this rule in that task for a period but do not wish to change the task permanently.
    - **One Run Only –** select to specify that the rule is to be run only once.

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.

6.3.2.1. Source Type > File

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

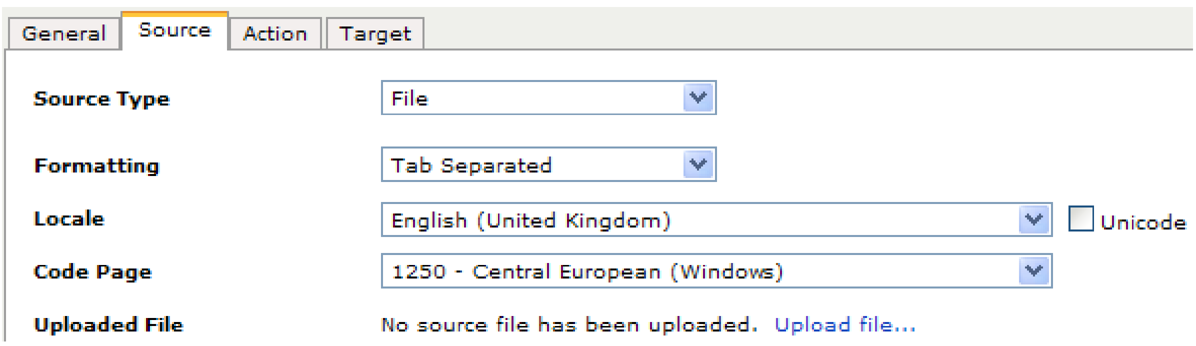


Figure 75 The Source tab with File selected as the Source Type

- **Formatting –** data is copied out as a text file. Select comma-separated or tab-separated as required.
- **Unicode –** check this box if the file is saved as Unicode. The Code Page property is then disabled.
- **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.
- **Code Page –** select the code used in the file.

1. Make the required settings, save them, then click **Upload File**.

   A File Upload dialog opens.

2. Browse to and select the file to be uploaded, then click **OK** to load the file.

   After the file is loaded, the **Mapping Setting** button appears.

3. Click to open the Mapping page.

   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.

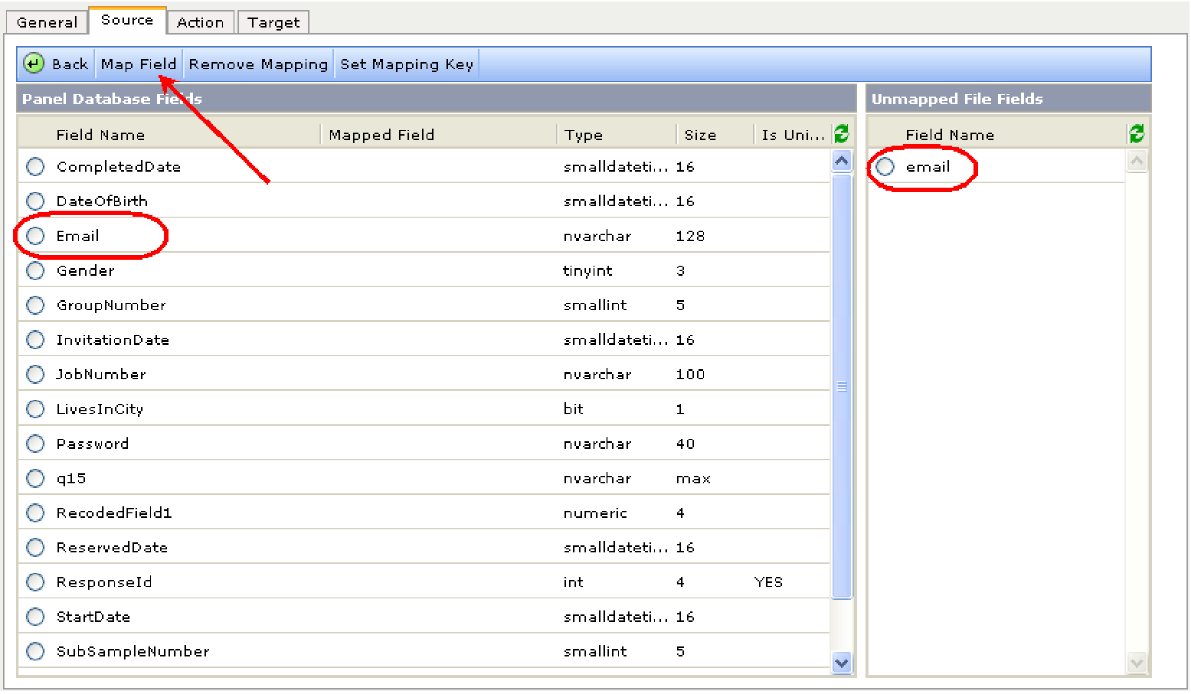


Figure 76 Example of the Mapping page

4. Map any unmapped fields to the appropriate columns in the database.

   To do this, select the Unmapped File Field (ringed to the upper-right of the page), then select the Panel Database Field to which you want to map the File Field (ringed towards the left side of the page), then click **Map Field** (arrowed in the toolbar). Note that in this case, as the File Field is named the same as the Database Field, the mapping would have been performed automatically.

5. On completion, click **Back** to return to the Source tab.

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

Note: If you have more than one BitStream data source in a panel and use rules to update them (see also section (go to Target Type > BitStream Files on page 67 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.

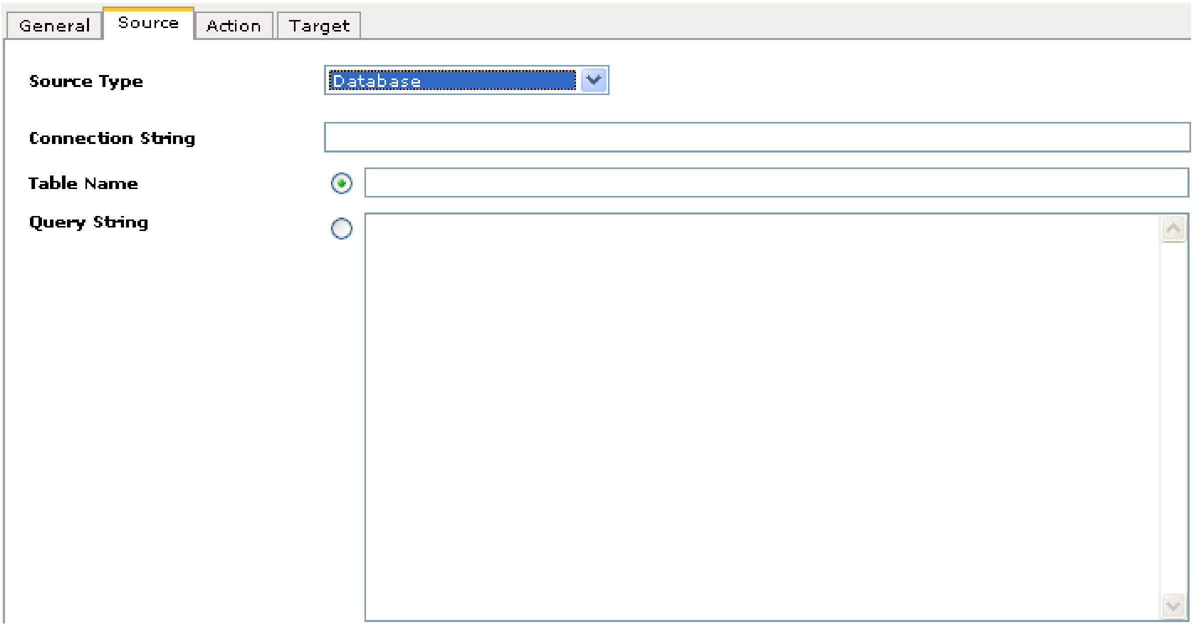


Figure 77 The Source tab with Database selected as the Source Type

- **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.

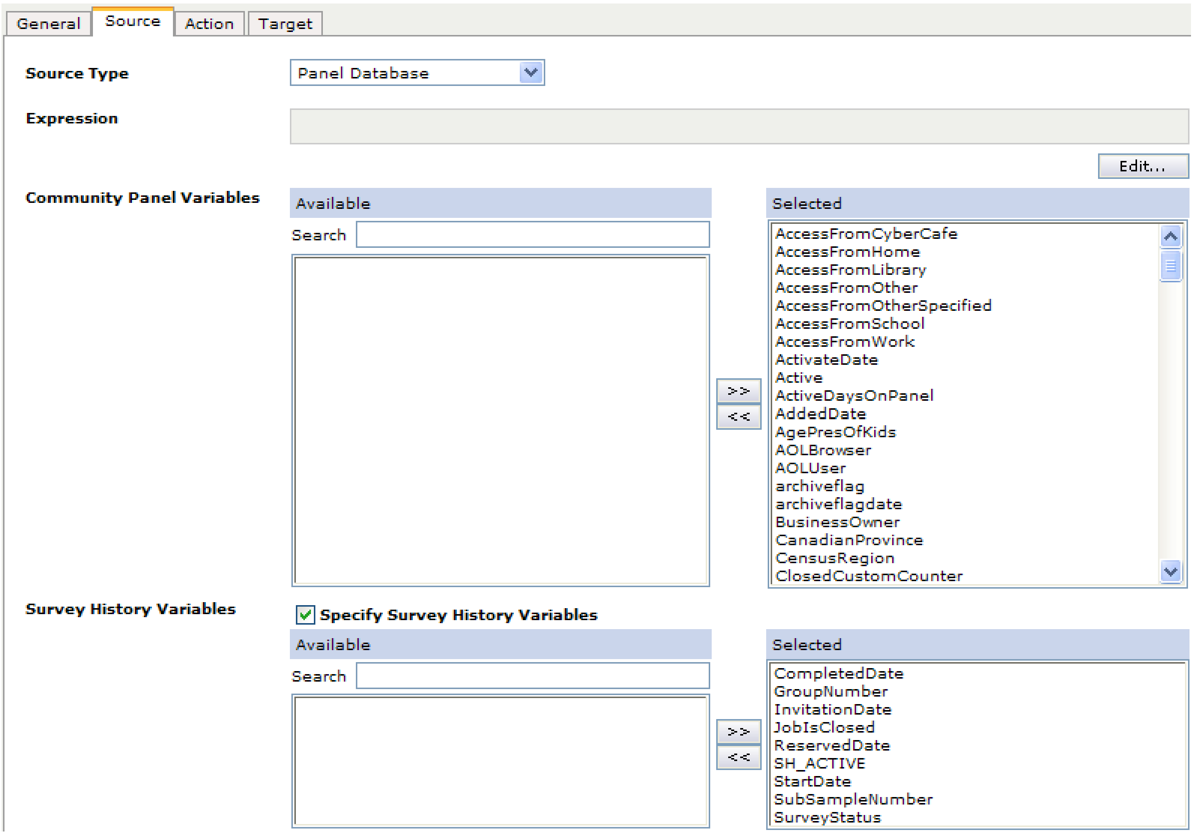


Figure 78 The Source tab with Panel Database selected as the Source Type

- **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 54 for more information).
- **Survey History Variables –** check this box only if exporting data and then if the result will be files, or if you wish to generate BitStream files.

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

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

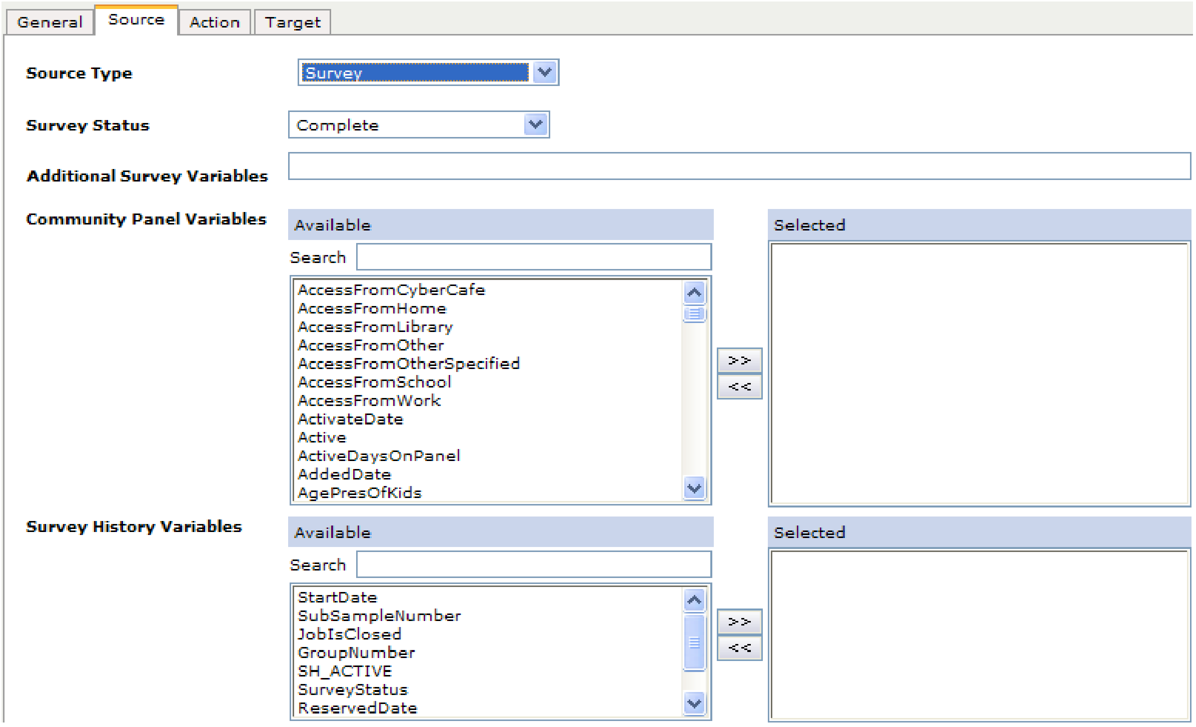


Figure 79 The Source tab with Survey selected as the Source Type

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

Note: When you select Source Type to be Survey, on the Target tab the Target Type parameter must be set to Panel Database and the Target Mode parameter must be set to Update **(go to Target Type > Panel Database on page 68 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 completed surveys.
  - o **Incomplete –** selects only data from completed surveys.
  - o **Non-starters –** selects only data from completed surveys.
  - 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 63 for more information).
- **Survey History Variables –** the fields in the Survey History table.

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.

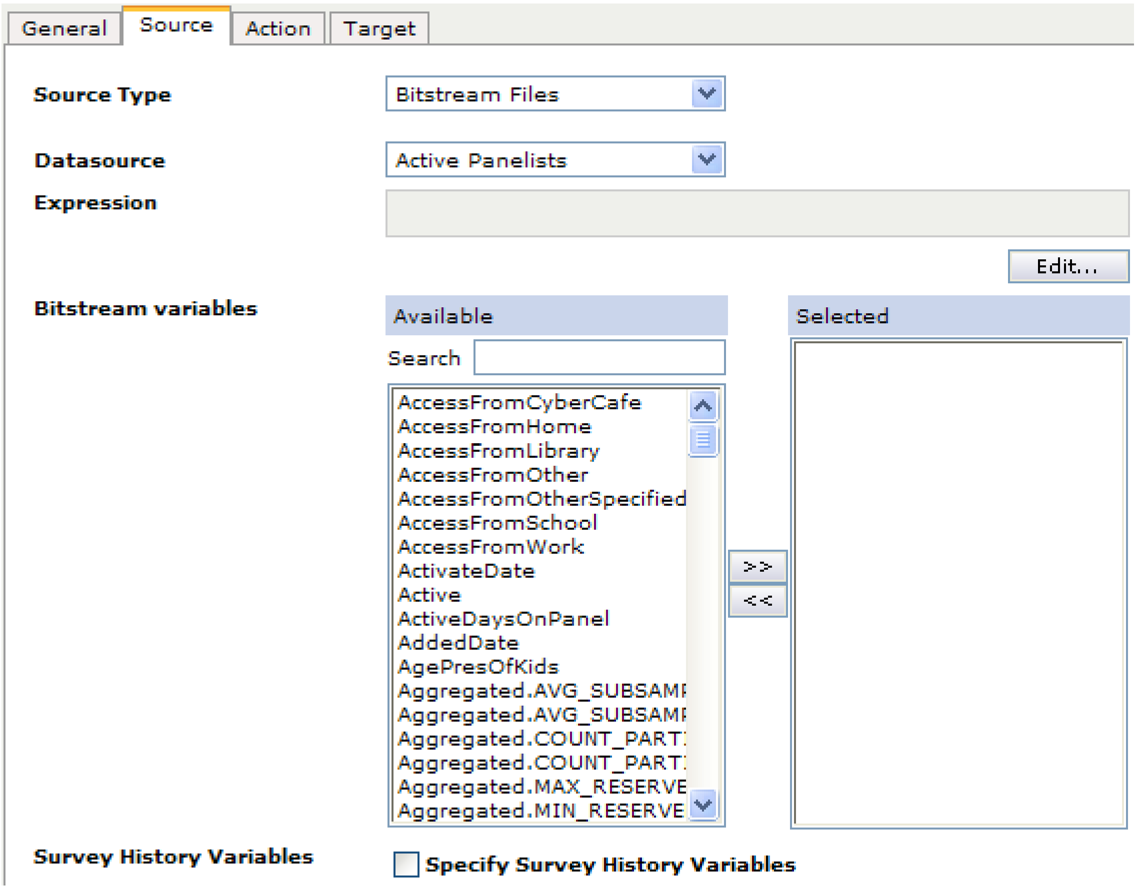


Figure 80 The Source tab with Bitstream Files selected as the Source Type

- **Datasource** - this field contains a list of the available BitStream files. Select the required file to populate the Available list. In the figure above, Active Panelists is selected.
- **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 54 for more information).
- **BitStream variables** - select the required variables.
- **Survey History Variables –** check this box only if exporting data and then if the result will be files, or if you wish to generate BitStream files.

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:

- **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.
- **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.
- **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 58 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 Global Variables Tab

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

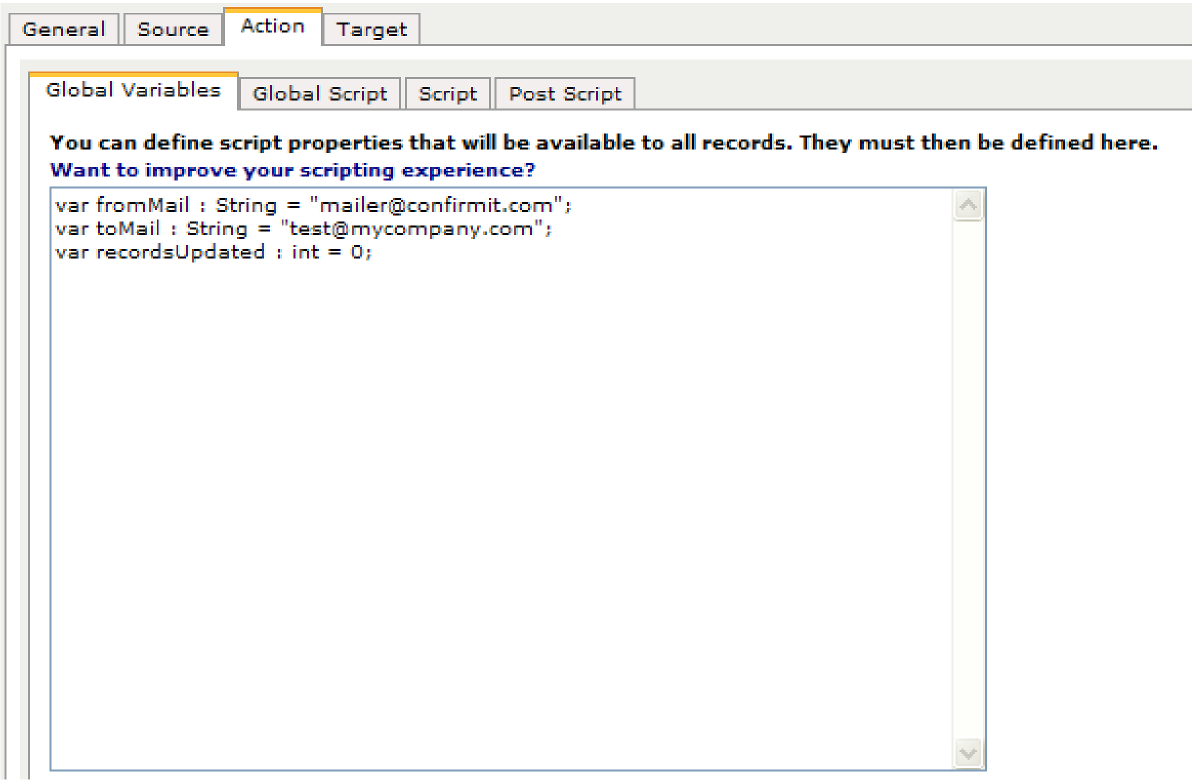


Figure 81 Example of the Global Variables tab

6.3.3.3. The Global Script Tab

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

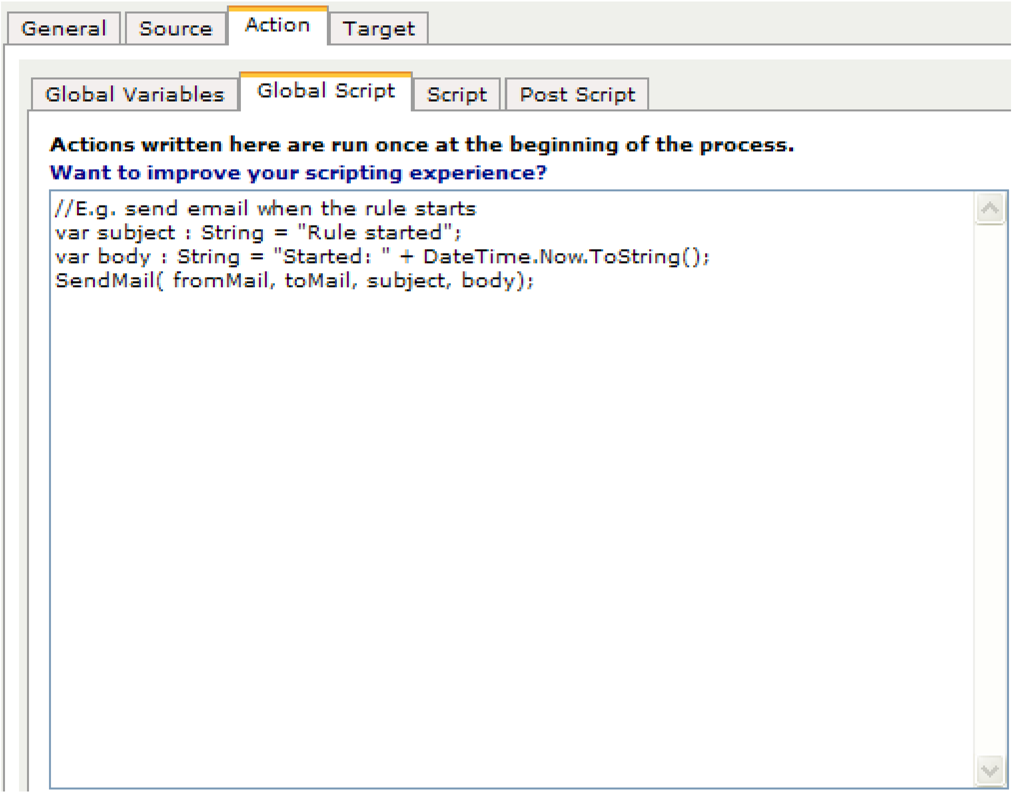


Figure 82 Example of the Global Script tab

6.3.3.4. 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.

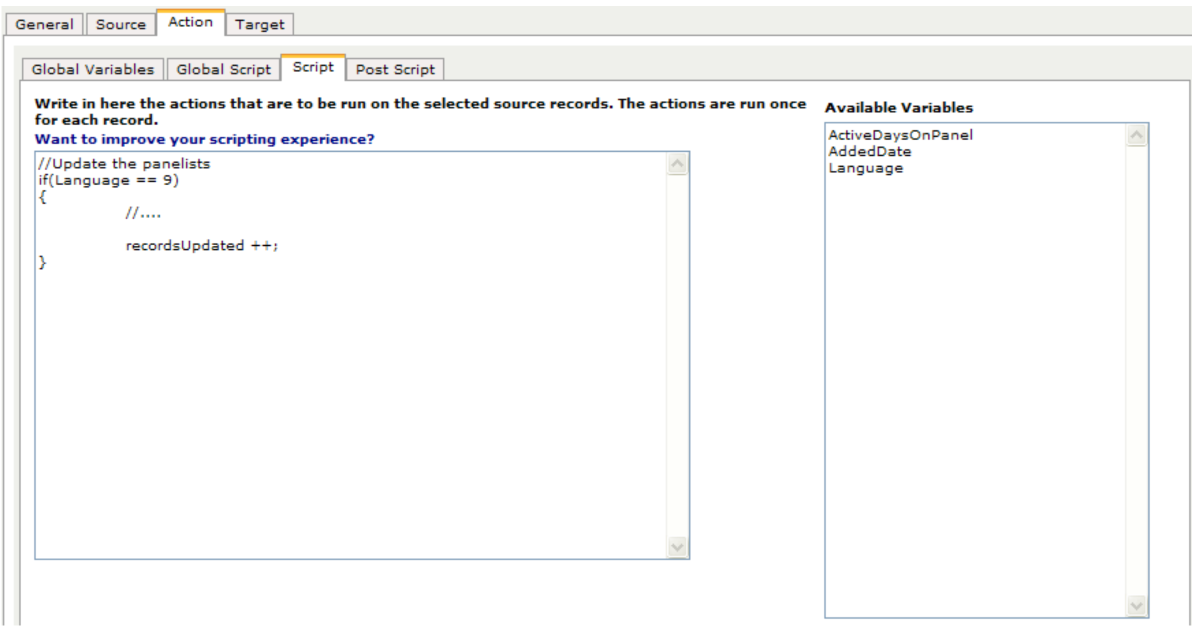


Figure 83 Example of the Script tab

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

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.

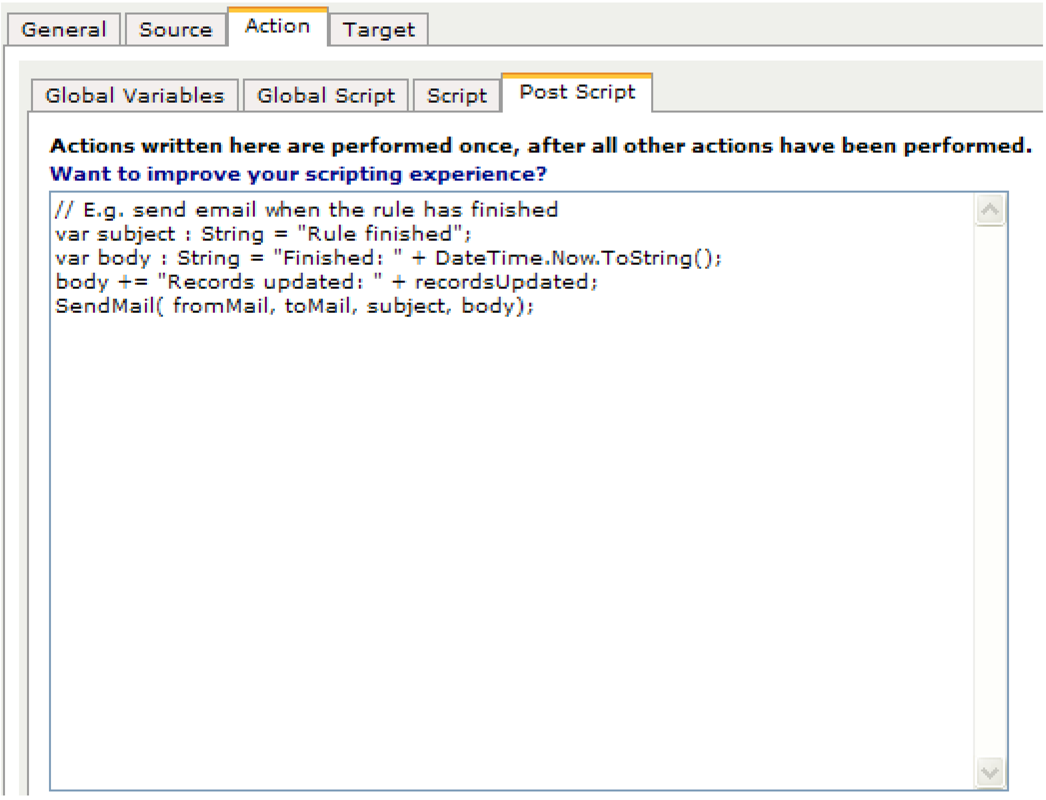


Figure 84 Example of the Post Script tab

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 58 for more information). The fields available on the Target tab depend on the Target Type that you select.

6.3.4.1. Target Type > File

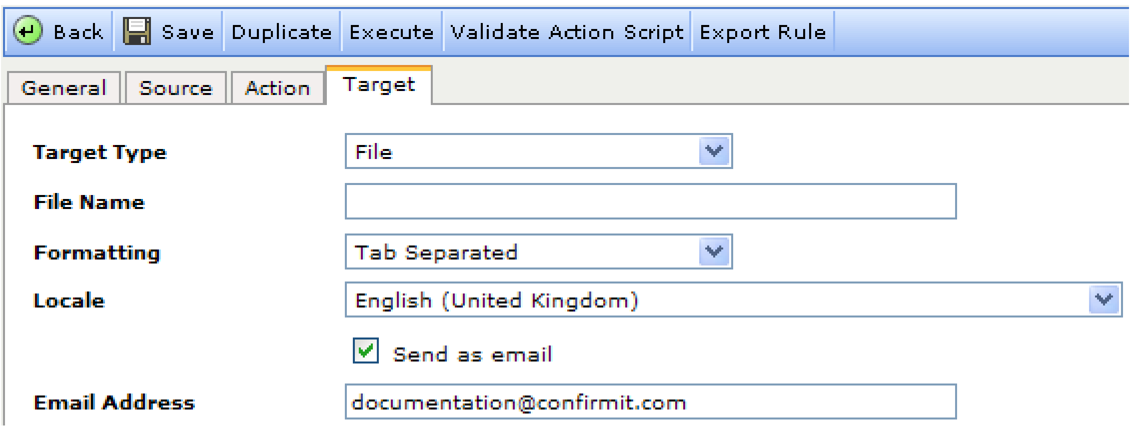


Figure 85 The tab when File is selected

- **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 or tab-separated as required.
- **Set Export Field Name –** you can change the names of the output columns. Click this button to open a mapping table, then define the new names for the columns. On completion, click **Save** to save the changes, then **Back** to return to the Target tab.
- **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.
- **Send as Email –** check this box if you want the data file to be attached to an email and sent.
- **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

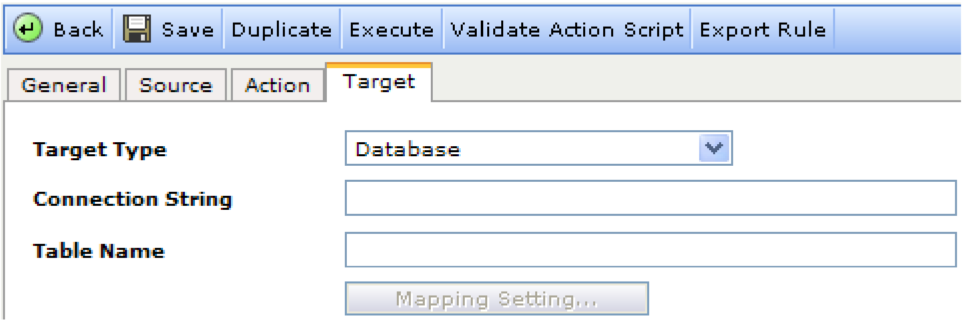


Figure 86 The tab when Database is selected

- **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

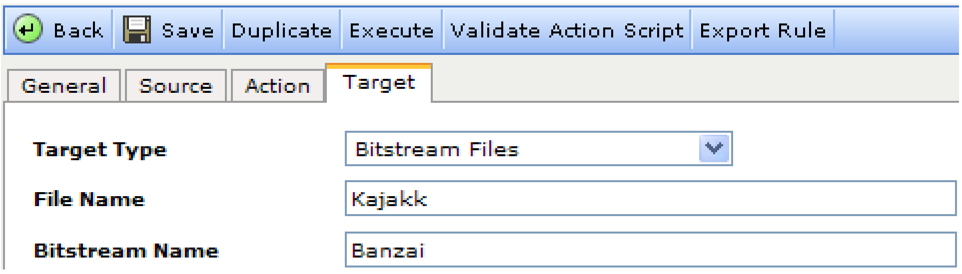


Figure 87 The tab when BitStream Files is selected

- **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

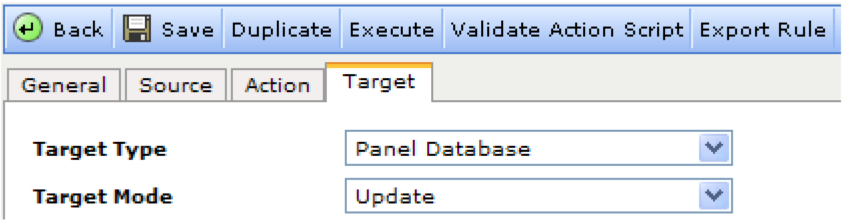


Figure 88 The tab when Panel Database is selected

Use to update the database.

- **Target Mode –** specify how the source data is to be added to the database.
  - **Update –** use if the source is a Panel database or if the Source is a file, and the file does include a Response ID column.
  - **Import –** use if the Source is a file, and the file does not include a Response ID column.
  - **Import with key –** use if the Source is a file, and the file does include a Response ID column.

Note: When you select Source Type to be Survey (go to Source Type > Survey on page 61 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.

6.3.4.5. Target Type > None

This type of "target" needs an Action script (go to The Action Tab on page 63 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 155 for more information).

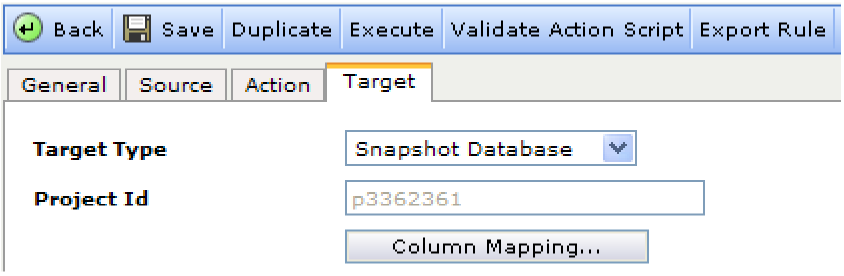


Figure 89 The Target Type tab when Snapshot Database is selected

- **Project ID** - the Snapshot project selected in the Overview page (go to Overview on page 14 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.

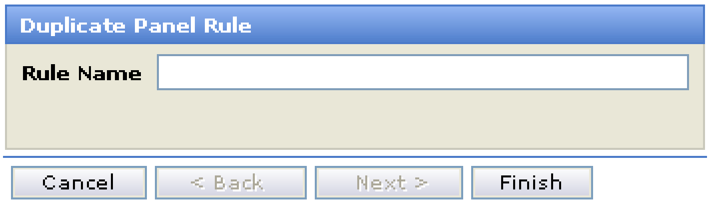


Figure 90 The Duplicate Panel Rule dialog

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.

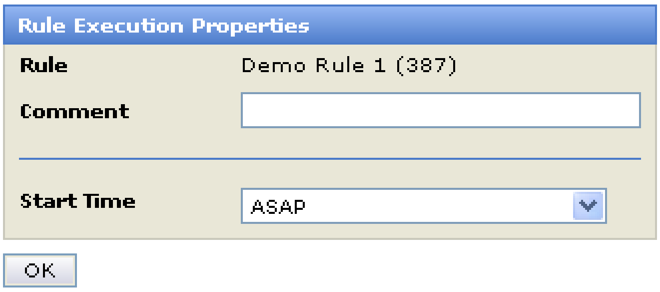


Figure 91 The Rule Execution Properties dialog

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 141 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.

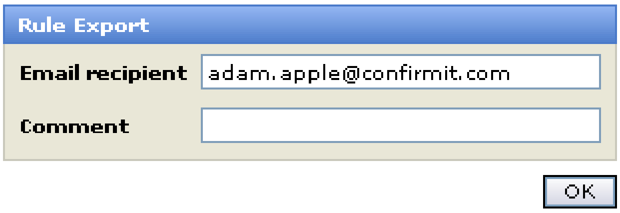


Figure 92 The Rule Export dialog

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 75 for more information).

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 75 for more information).

6.4.1. The General Tab

The Rule Set Details page opens at the General tab.

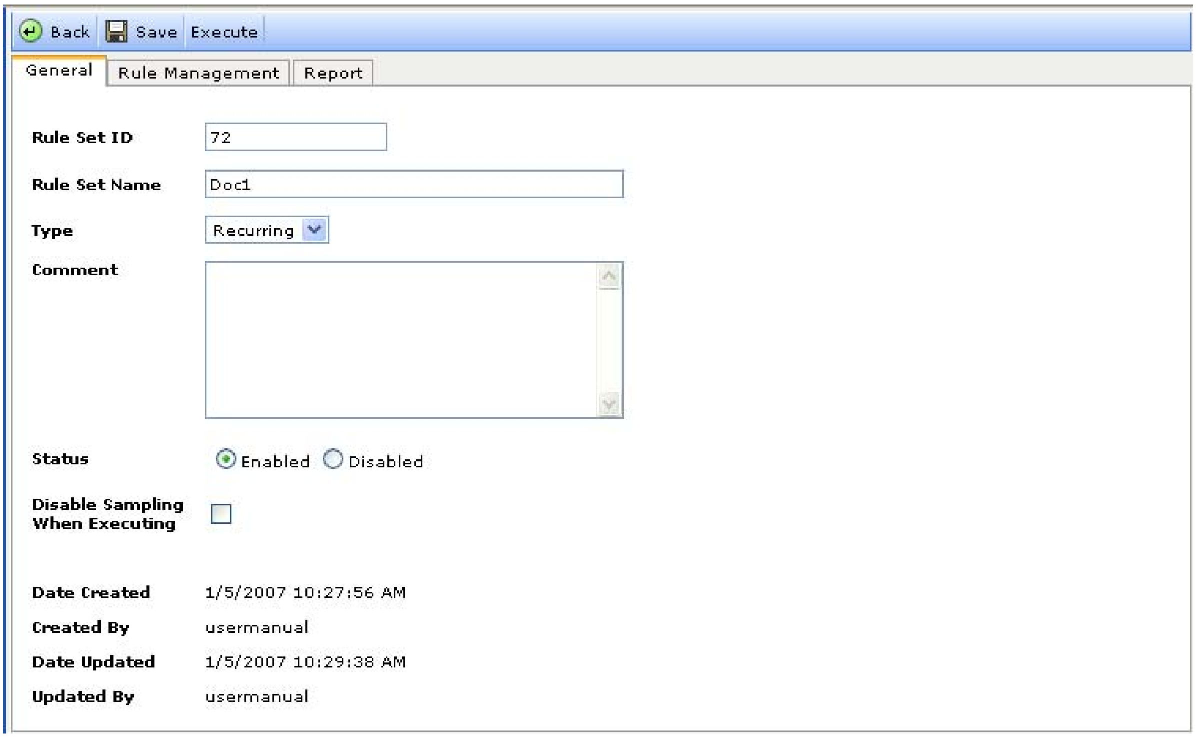


Figure 93 Example of the Rule Set Details page > General tab

- **Rule Set ID –** the identification number for the rule set. This number is generated automatically by Confirmit and cannot be changed.
- **Rule Set Name –** the name given to the rule set when it was created/last edited. You can change this name as required.

- **Type –** the type of rule set. The options are:
  - **Ad Hoc –** a rule set that is created for a specific use/event.
  - **Recurring –** a rule set created to perform a long-term job, that will normally recur at regular intervals.
- **Comment –** a description of the rule set, to simplify identification.
- **Status –** the status for the rule set.
  - **Enabled –**allows the rule to be run "as required". This is the default setting.
  - **Disabled –** select this option if you wish to prevent the rule from being run. This could be useful if you have a recurring task, and wish to stop using this rule set in that task for a period but do not wish to change the task permanently.
- **Disable Sampling When Executing –** check the box to prevent sampling being performed on the database while the rule set is being run.
- **Date information –** for information only.

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.

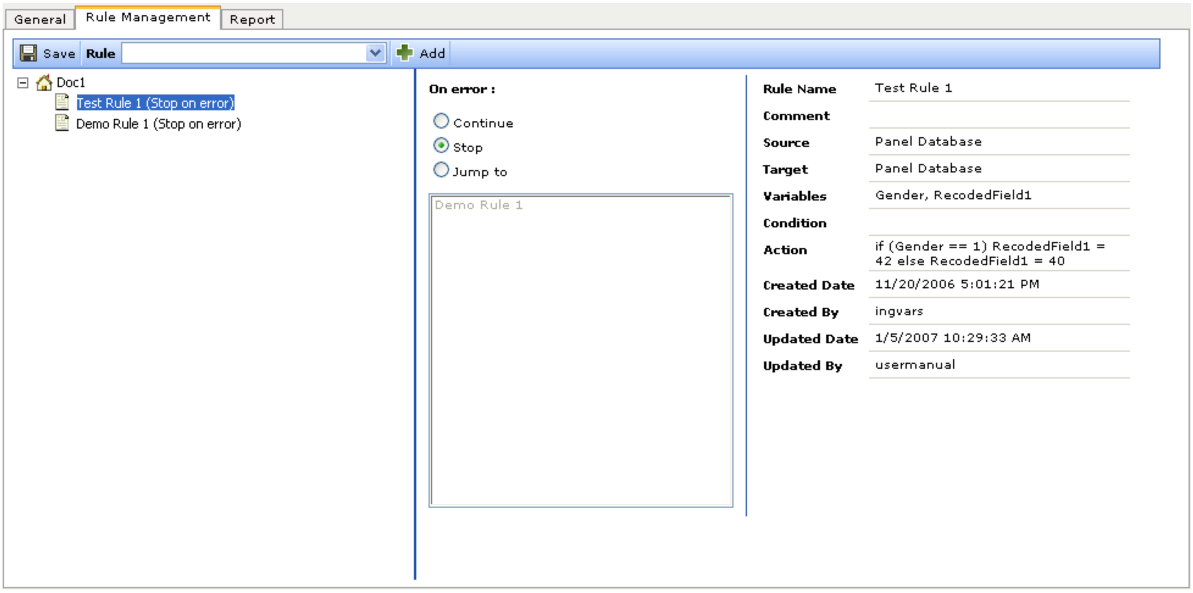


Figure 94 Example of the Rule Management tab

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

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).

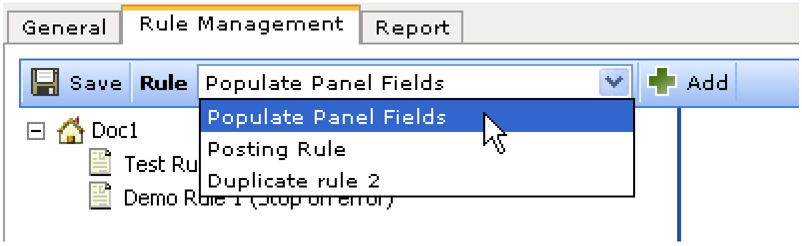


Figure 95 Selecting a rule to add to the rule set

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

   The rule is added to the rule set.

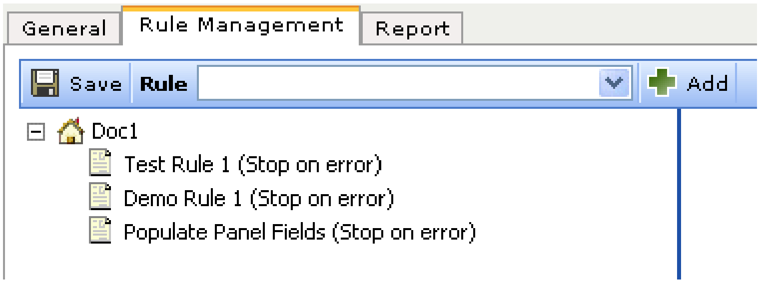


Figure 96 The rule added to the rule set

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.

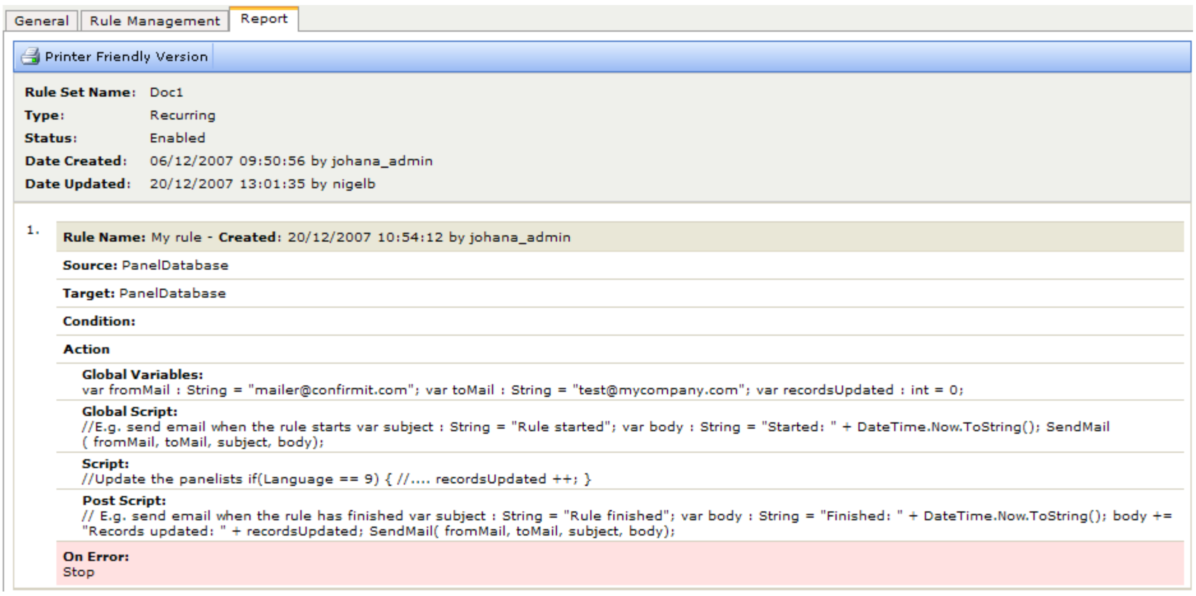


Figure 97 Example of the Report tab

Click **Printer and Save 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.

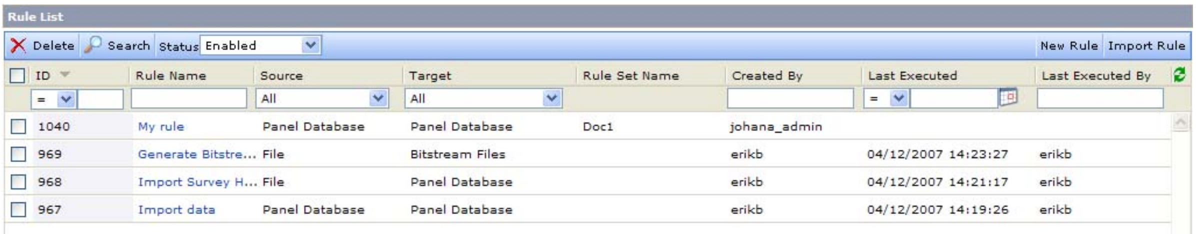


Figure 98 The Panel Rule List

Click on a Rule Name link to open the Current Rule page for that rule (go to Current Rule on page 57 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.

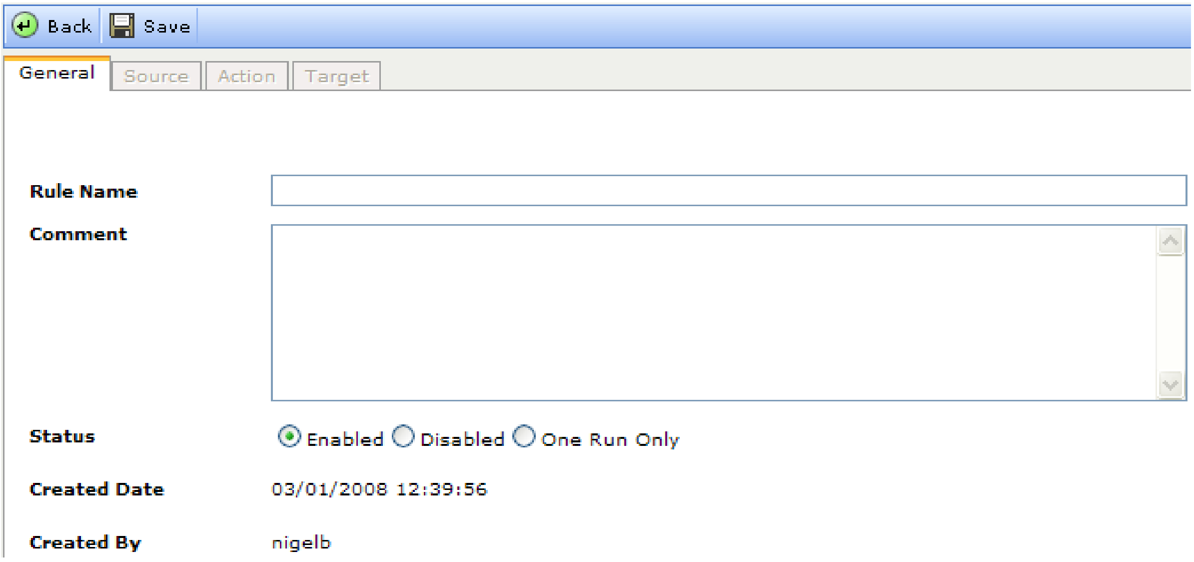


Figure 99 The Add New Rule page

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:
   - **Enabled –** select to allow the rule to be run "as required". This is the default setting.
   - **Disabled –** select this option if you wish to prevent the rule from being run. This could be useful if you have a recurring task, and wish to stop using this rule in that task for a period but do not wish to change the task permanently.
   - **One Run Only –** select to specify that the rule is to be run only once.
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 57 for more information), and the Source, Action and Target tabs become active.

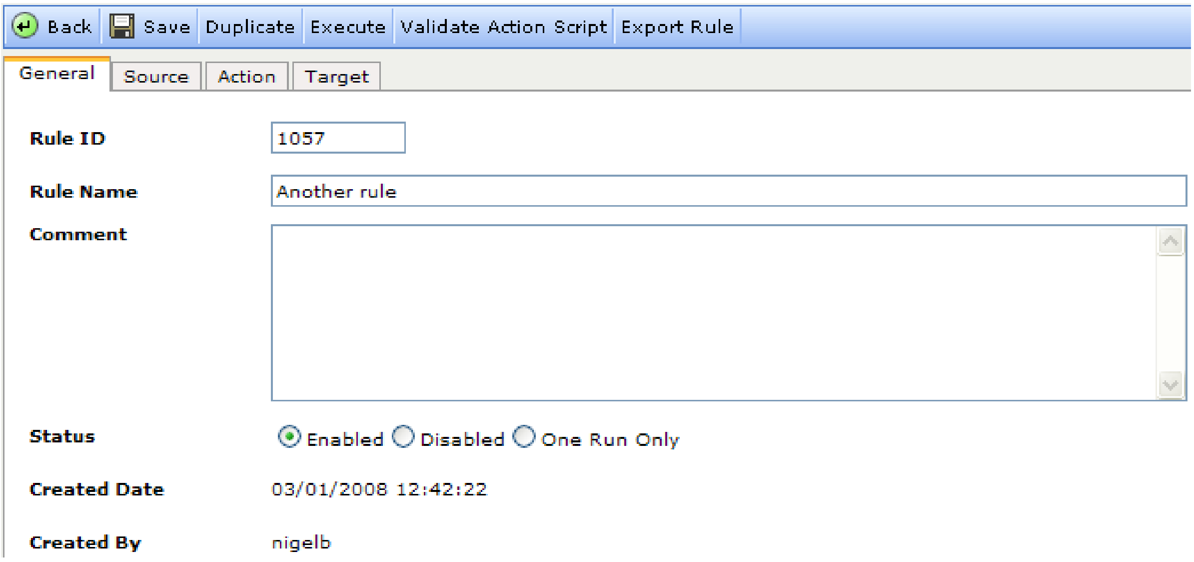


Figure 100 Example of the Panel Rule Details form

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 69 for more information). Proceed as follows to import a rule into the current Panel or server.

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

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

   The Rule Import dialog opens.

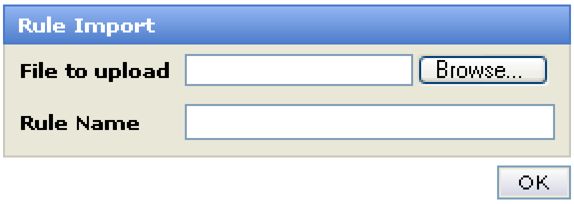


Figure 101 The Rule Import dialog

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 57 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.

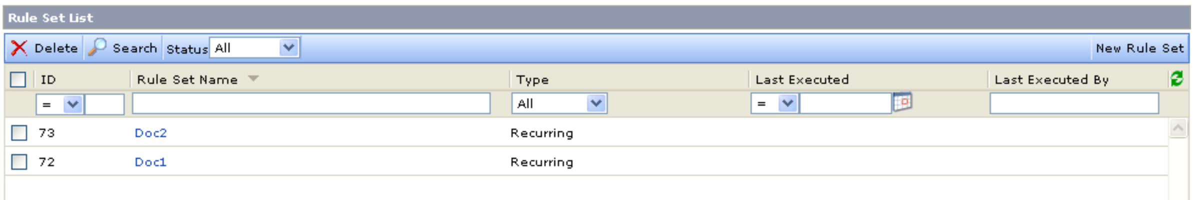


Figure 102 Example of the Rule Set List

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 70 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.

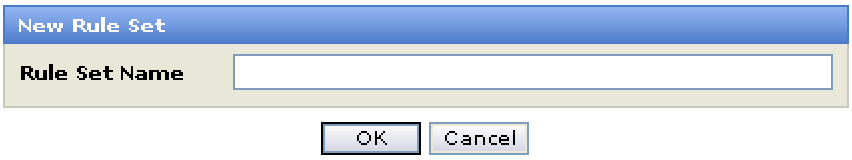


Figure 103 The New Rule Set dialog

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 70 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.

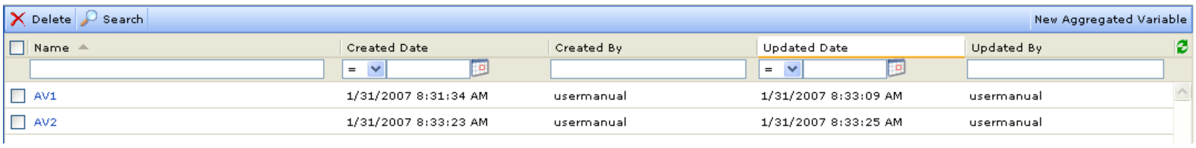


Figure 104 Example of the Aggregated Variable List

To open an Aggregated Variable, click on the blue **Name** link for that variable in the list. In 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

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

   The Aggregated Variables window opens.

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

   The New Aggregated Variable dialog opens.

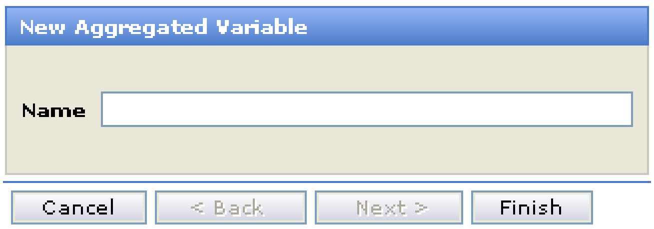


Figure 105 The New Aggregated Variable dialog

3. 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.

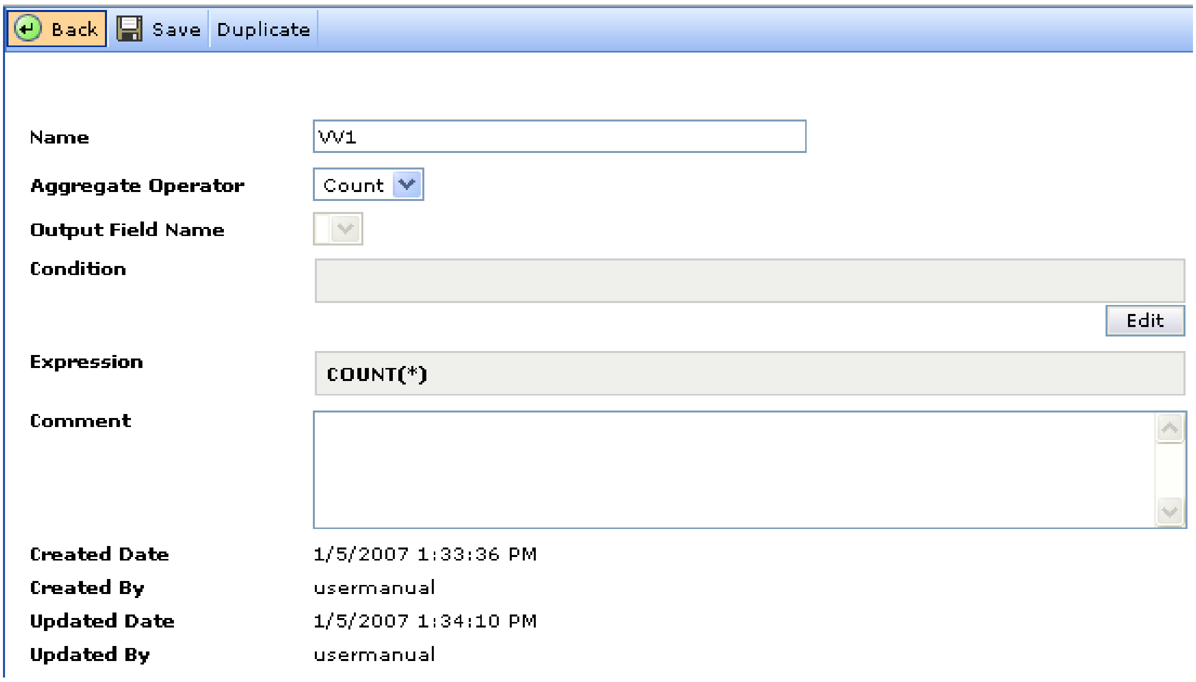


Figure 106 Example of the editing page for an Aggregated Variable

- **Name –** the name of the selected virtual variable. You can edit this as required.
- **Aggregate Operator –** select the type of operator you wish to use. Options are:
  - **Count –** counts the number of rows in the table that satisfy the condition, and outputs the result.
  - **Avg –** totals the values in the table fields that satisfy the condition, and outputs the average value.
  - **Min –** examines the values in the table fields that satisfy the condition, and outputs the minimum value.
  - **Max –** examines the values in the table fields that satisfy the condition, and outputs the maximum value.
  - **Sum –** totals the values in the table fields that satisfy the condition, and outputs the result.
- **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 54 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 60 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.

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

Figure 107 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.

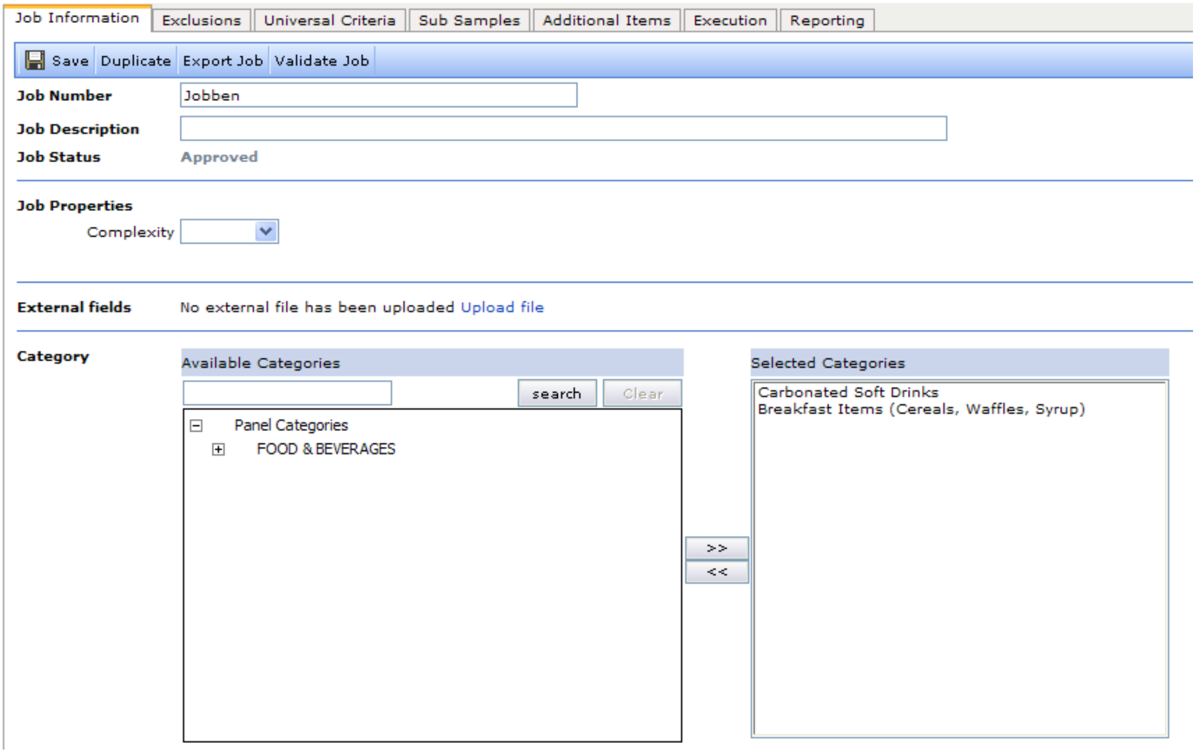


Figure 108 Example of the Job Information tab

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.
- **Job Description** – a free-text description of the job to simplify identification later. You can edit the description at any time.
- **Job 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.

- **Job 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 151 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 Elimination Tab on page 82 for more information).
- **External Fields** – allows you to upload additional information on particular panelists. This information will be in the form of text files that must be created outside of Confirmit and uploaded. The files must contain the panelist’s ID and the extra information, and they must be uploaded for an individual panelist or for a group of panelists (go to How to Upload a File on page 80 for more information).
- **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 150 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.

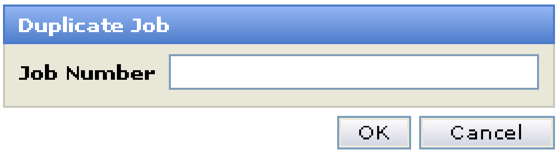


Figure 109 The Job Import dialog box

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.

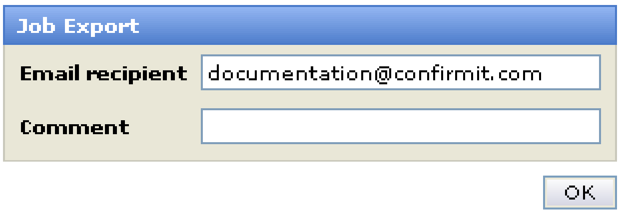


Figure 110 The Job Export dialog box

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

7.1.1.3.3. How to Upload a File

You can upload text files of additional information on panelists.

Note: The file must be of .txt format and must be named matchfile.txt.

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

   The upload Settings dialog box opens.

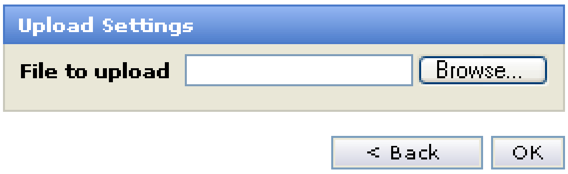


Figure 111 The Upload Settings dialog box

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 **Back** to change the selected file.

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 get 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.

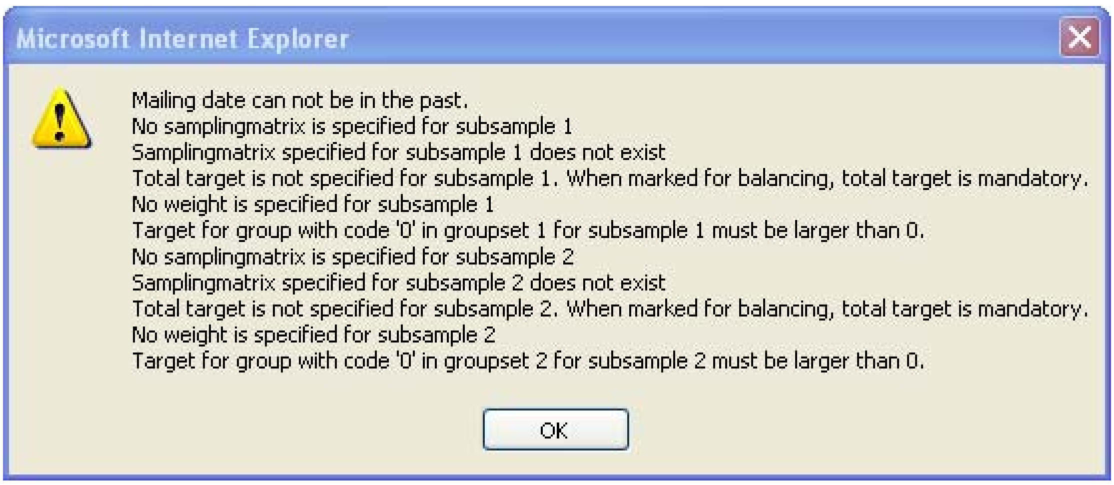


Figure 112 Example of a verification message list

   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 113 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 two sub-tabs:

- **Auto Elimination** – panelists are excluded automatically if they conform to the general rules set here.
- **Manual Elimination** – you can set additional exclusion rules and/or relax some rules.

7.1.2.1. The Auto Elimination Tab

The Auto Elimination function is controlled by dates. Here you can select the type of elimination you wish to use; Category and/or Date, and set the dates within which you wish the elimination rules to apply.

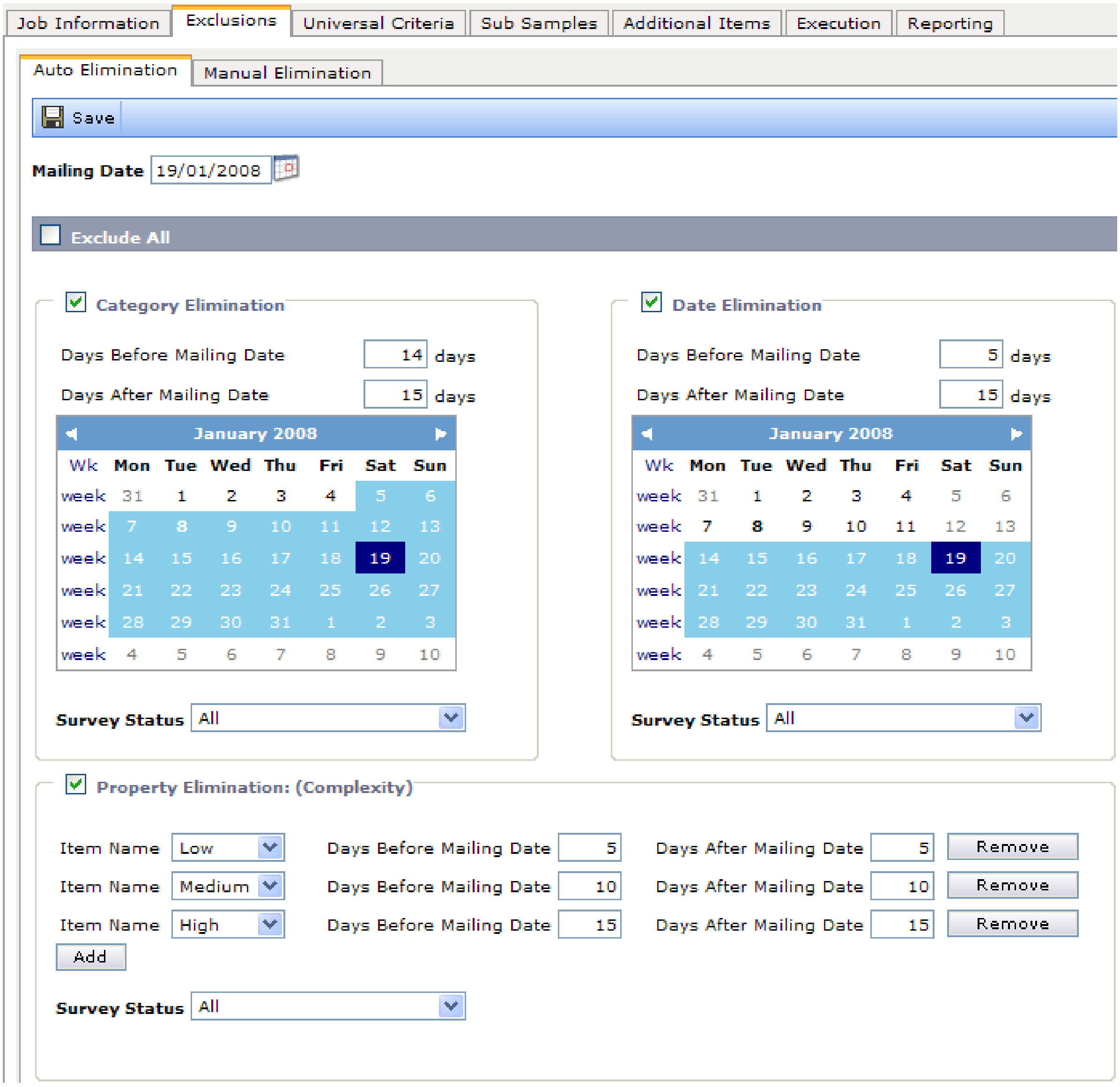


Figure 114 The Auto Elimination tab

The Auto Elimination tab controls three functions:

- **Category Elimination** – 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 Elimination** – 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 85 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 Elimination** – a Property Definition (go to The Property Definitions Tab on page 151 for more information) can be activated so it can be used in the elimination. 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 87 for more information).

7.1.2.2. The Manual Elimination Tab

You may wish to include some potential panelists in your survey who have been excluded by the Auto Elimination 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 Elimination function. The Manual Elimination tab provides you with these possibilities.

The tab is divided horizontally into two lists:

- **Available Job** - the jobs currently registered in your database, which are available to be excluded or relaxed.
- **Selected Job** – jobs selected 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.

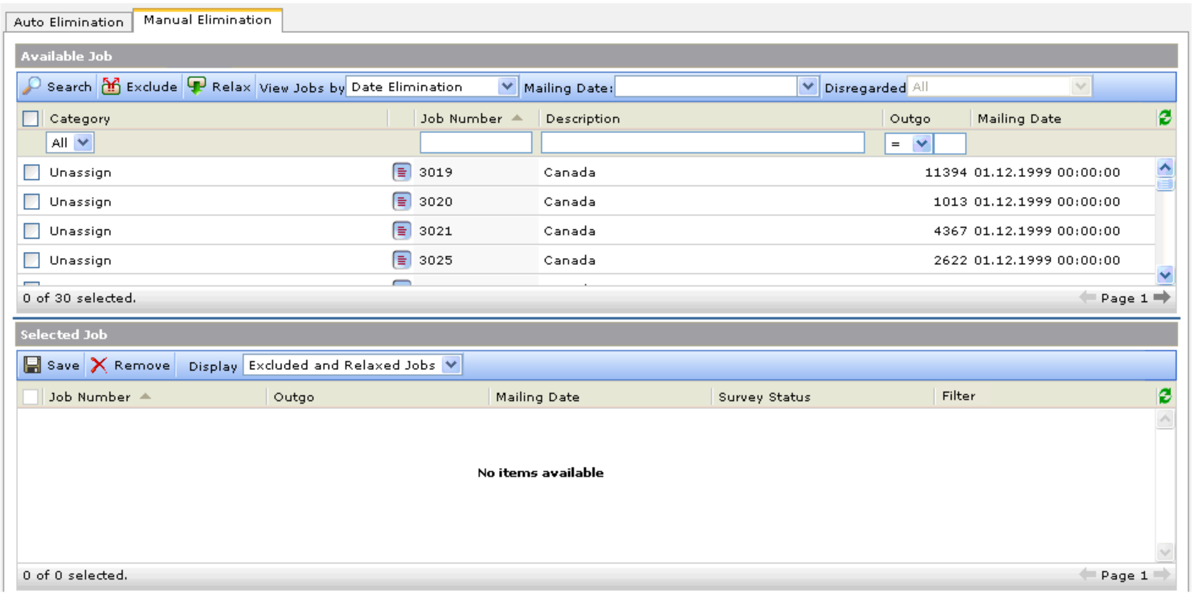


Figure 115 Example of the Manual Elimination tab

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.

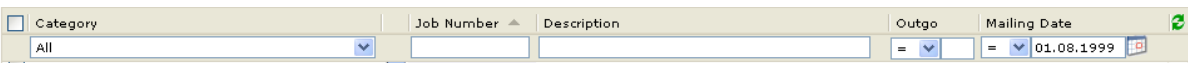


Figure 116 The joblist filter fields

The filters are as follows:

- **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**.
- **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.

7.1.2.3. Procedures in the Exclusions Tab

7.1.2.3.1. How to Set the Mailing Date

1. Go to the **Sample Management > Current Job** menu command.
2. Click the **Exclusions** tab.

   The Exclusions window opens at the **Auto Elimination** tab.
3. On the **Auto Elimination** tab click on the calendar icon to the right of the Mailing Date field.

   The calendar opens.

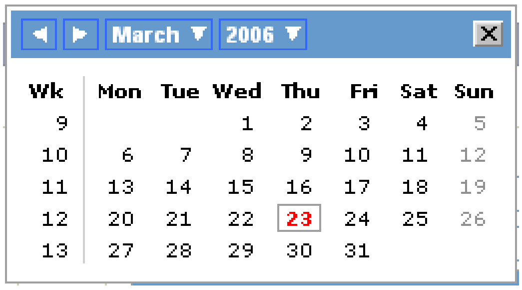


Figure 117 The calendar

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 blue, 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 fields lower in the window are then applied around the selected Mailing Date.
5. Click **Save** to save the changes.

7.1.2.3.2. Exclude All

This check box is on the Auto Elimination tab. Check this box to exclude all panelists for all jobs. You can then go to the Manual Elimination 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.

7.1.2.3.3. How to Set the Category Elimination 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 Elimination** tab.

3. Check the Category Elimination box.

   The Category Elimination function is activated.

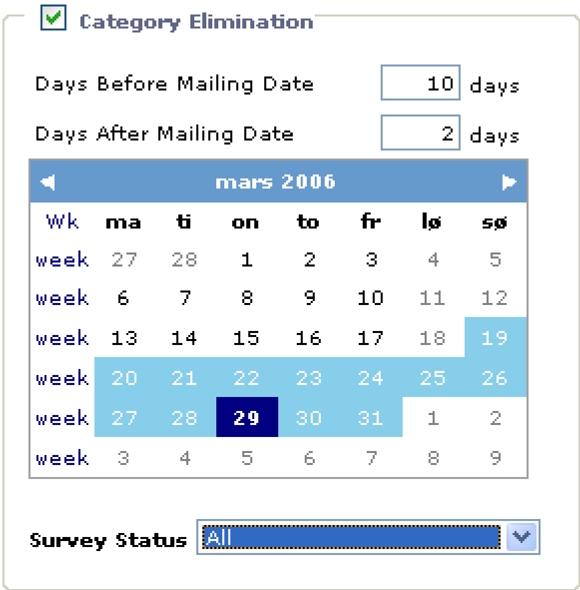


Figure 118 The Category Elimination function

4. In the Days Before… and Days After… data fields, specify the number of days which, if a panelist has been included in another panel of the same category during this period, they are to be excluded from this survey.

5. Click the drop-down arrow beside the Survey Status field to open a list of the statuses and select the desired option.

   The options are:

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

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

7.1.2.3.4. How to Set the Date Elimination 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 Elimination** tab.

3. Check the Date Elimination box.

The Date Elimination function is activated.

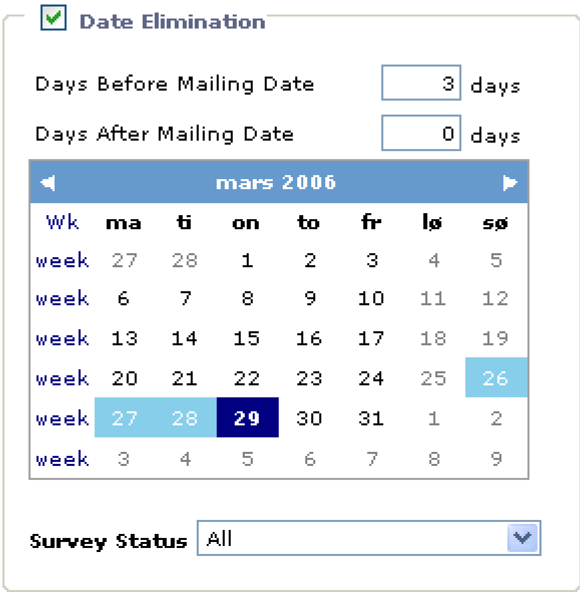


Figure 119 The Date Elimination function

4. In the Days Before… and Days After… data fields, specify the period during which, if a potential panelist has been included in any other panel, they are to be excluded from this panel.

5. Click the drop-down arrow beside the Survey Status field to open a list of the statuses.

6. Select the desired option.

   The options are:

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

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

7.1.2.3.5. 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 151 for more information).

1. Go to the **Sample Management > Sampling Settings** menu command.

   The Sampling Settings window opens.

2. Go to the **Property Definitions** tab.

   A list of the available Property Definitions is displayed, as shown in the example below.

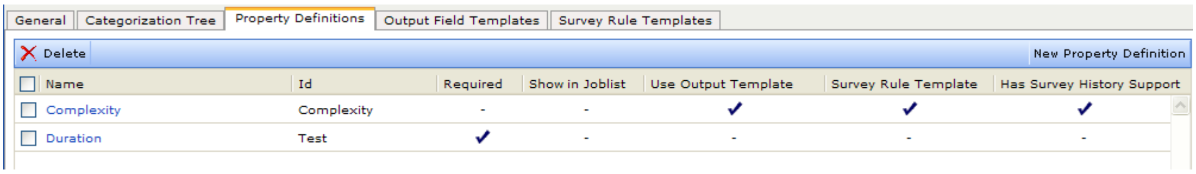


Figure 120 Example of the Property Definitions list

3. Click on the Name of the Property Definition you wish to use, to open the Property Definition page for that property.

   The page shown in the example below opens.

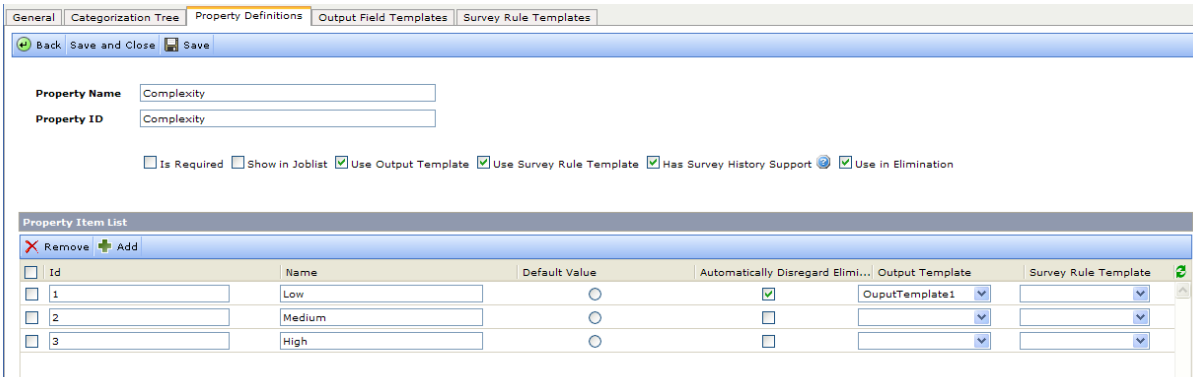


Figure 121 Example of the Definition page for a property

4. Check the **Use In Elimination** box, and other boxes as required.

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.

5. Click **Save and close**.
6. Go to the **Sample Management > Current Job** menu command, then go to the **Exclusions** tab.
7. On the Auto Elimination tab, check the **Property Elimination** box.

   Note that the Property Definition you selected in step 3 above is now named in the Property Elimination (arrowed in the figure below).
8. Click **Add**.

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

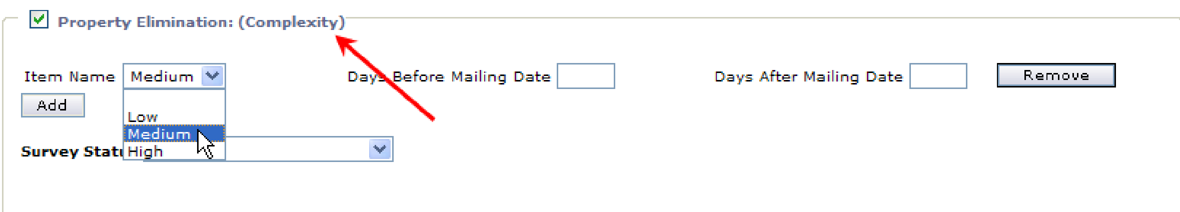


Figure 122 Example of the Property Elimination list

9. Select the required item (in the figure above the Complexity property is selected, so the Item Name field lists the items registered for the Complexity property. In this case the Medium 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.

7.1.2.3.6. 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 Elimination** tab.
3. Go to the **Manual Elimination** 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 Job 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.

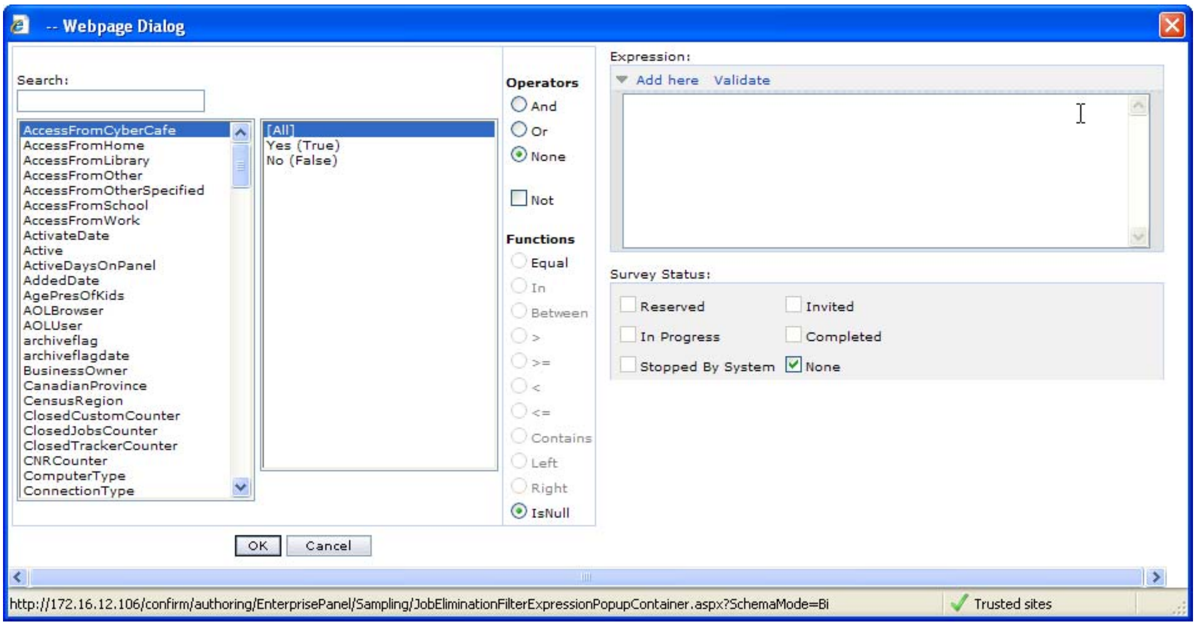


Figure 123 The Filters Web Page dialog

8. Create an expression as necessary (go to The Universal Criteria Tab on page 90 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 Elimination tab.
11. Click **Save** to save the changes.

Any potential panelists who satisfied 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.

7.1.2.3.7. How to Relax 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 Elimination 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 Elimination** tab.
3. Go to the Manual Elimination 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 **Relax** 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.

7.1.2.3.8. 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 Elimination** tab.
3. Go to the Manual Elimination 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 Universal Criteria Tab

This tab is where you create the selection criteria expression that is the overall filter for the panelists. You can select criteria from the list and assemble them using the operators and functions, or if you have the required knowledge you can write the expression directly into the data field.

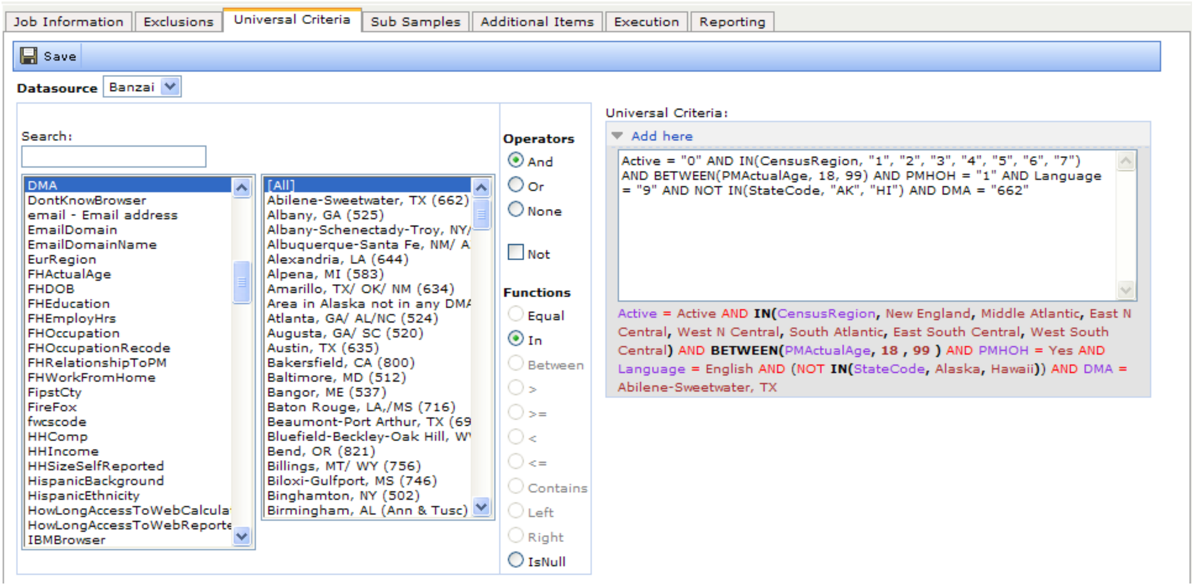


Figure 124 Example of the Universal Criteria tab

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:
  - **And** – a conjunction operator to be used when more than one criteria must be satisfied. For example, the panelist must be male and must be married.
  - **Or** – a conjunction operator to be used when one or more criteria must be satisfied. For example, the panelist must have network access from home or from work.
  - **None** – this is not a conjunction operator. Use when adding the first criteria in the expression.
  - **Not** – the negative operator. Use for example when you want panelists who are not in banking though any other profession is acceptable.
- The Functions (these will be active depending on the criteria selected):
  - **Equal** – use when you want the selected criteria to be equal to a specific value, for example when you want panelists of a specific age or you want the criteria to be Yes or No.
  - **In** – use when the criteria value is to be one of a range or set of values.
  - **Between** – use when you want the criteria to be between two values, for example between two dates.
  - **>** (Greater than) - use when the criteria is to be greater than a specified value.
  - **>=** (Greater than or equal to) - use when the criteria is to be greater than or equal to a specified value.
  - **<** (Less than) – use when the criteria is to be less than a specified value.
  - **<=** (Less than or equal to) – use when the criteria is to be less than or equal to a specified value.
  - **Contains** – you can write an expression that looks, for example, for a certain combination of four characters anywhere in a line of text.
  - **Left** – you can write an expression that looks, for example, for the first three characters in a line of text. In this case select Left as the desired string is to be on the left end of the line.
  - **Right** – you can write an expression that looks, for example, for the last three characters in a line of text. In this case select Right as the desired string is to be on the right end of the line.
- Other data fields
  - **Text area** – type text as required into this field. The field is only accessible for certain pre-defined criteria.
  - **Paste area** – here you can paste in, for example, a list of values copied from a document.

- **Number** – here you can type in numerical characters only. Use in conjunction with a Function (see above) when, for example, you want a criteria to have a specific numerical value. The field is only accessible for certain pre-defined criteria.
- **End Number** – when the Number field is open, if you also select the Between function, a second numerical data field appears. This enables you to input a second number such that you can specify the criteria must have a value between the two given numbers.

7.1.3.2. Procedures in the Universal Criteria Tab

7.1.3.2.1. How to Create an Expression

Note: The procedures for creating expressions in the Universal Criteria tab and in the Sub Samples > 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 Universal Criteria tab has a Save button. The Universal Criteria 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.

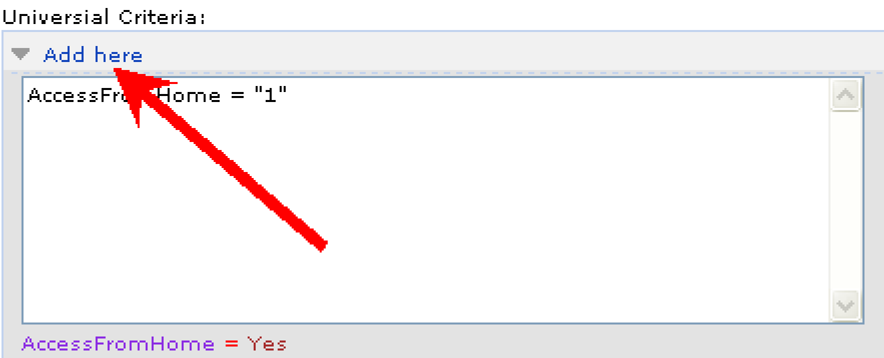


Figure 125 Adding criteria to the data field

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

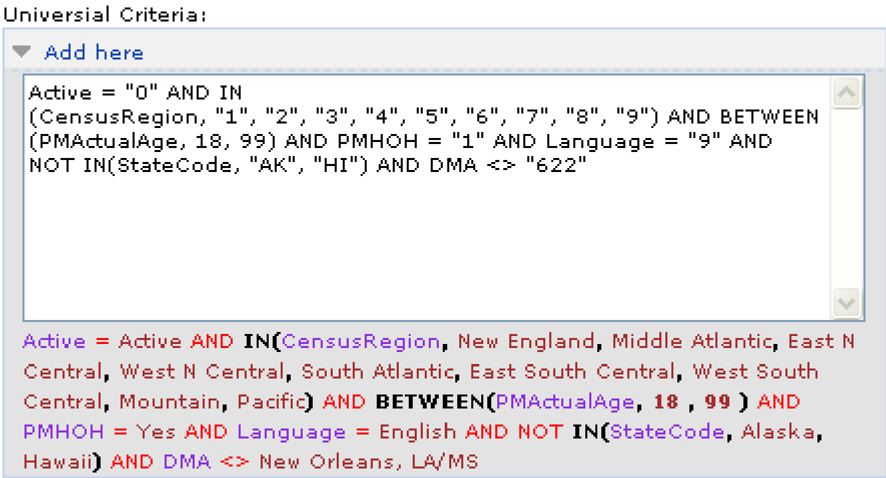


Figure 126 Example of a complete expression

7.1.4. The Sub Samples 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 Sub Samples function allows you to create such groups.

To access this function, go to the **Sample Management > Current Job** menu command, then click the **Sub Samples** 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 93 for more information), or double-click on the item, to open its editor page.

The following sections describe the editor pages for the various items in the hierarchy.

7.1.4.1. The Right-Click Menu

Place the cursor over an item in the hierarchy then click the right mouse button to open the right-click menu for that item. The menu commands available will depend on the type of item selected in the hierarchy. The full set of possibilities is listed below:

- **Edit** – opens the editor page for the selected item. You can also open the editor page for an item by double-clicking on the item.
- **Add Group Set (Below)** – creates a new Group Set below (within) the currently selected Sub Sample.
- **Add Group Set (After)** – creates a new Group Set after the currently selected Group Set.
- **Add Sub Sample (Below)** – creates a new Sub Sample below (within) the Sub Sample hierarchy.
- **Add Sub Sample (After)** – creates a new Sub Sample after the current Sub Sample.
- **Refresh** – refreshes the window to ensure all changes are displayed.
- **Expand All** – expands the entire hierarchy.
- **Collapse All** – collapses the entire hierarchy.
- **Duplicate** – duplicates the selected Sub Sample and its underlying Group Sets and places the new Sub Sample at the bottom of the hierarchy.
- **Delete** – deletes the selected item. You are asked to confirm the deletion.

7.1.4.2. The Sub Samples Folder Editor Page

In the hierarchy column, either right-click on the Sub Samples item then select **Edit** from the drop-down menu, or double-click on the item, to open its editor page

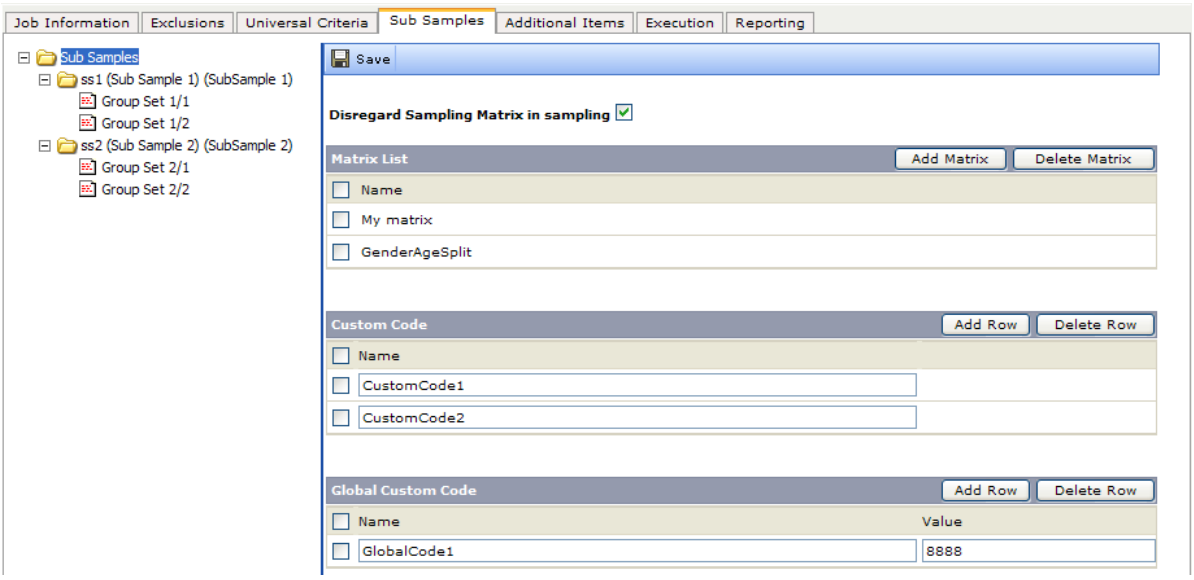


Figure 127 Example of the editing page for the Sub Samples folder

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 Universal Criteria Tab on page 90 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 94 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 94 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

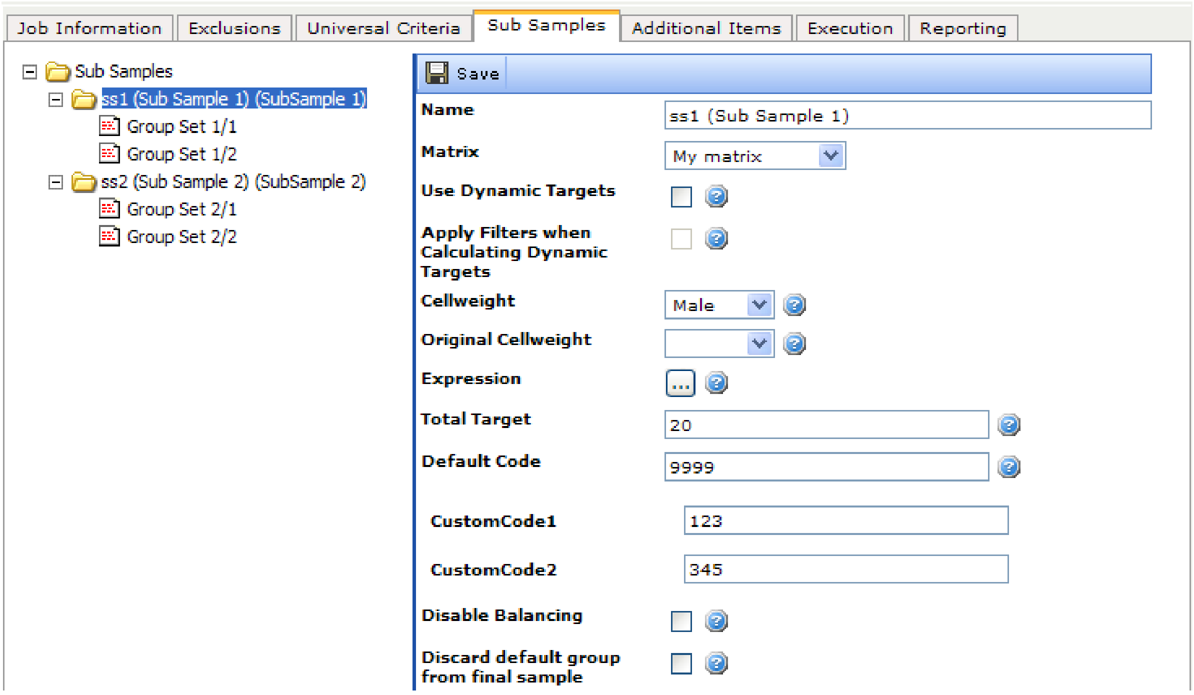


Figure 128 Example of the editing page for a sub sample folder

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 94 for more information).

The Sub-folders have the following data fields in their editing pages:

- **Name** – the name for the sub sample.
- **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 94 for more information)
- **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 92 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 97 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 144 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 149 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 the Group Set item then select **Edit** from the drop-down menu, or double-click on the item, to open its editor page

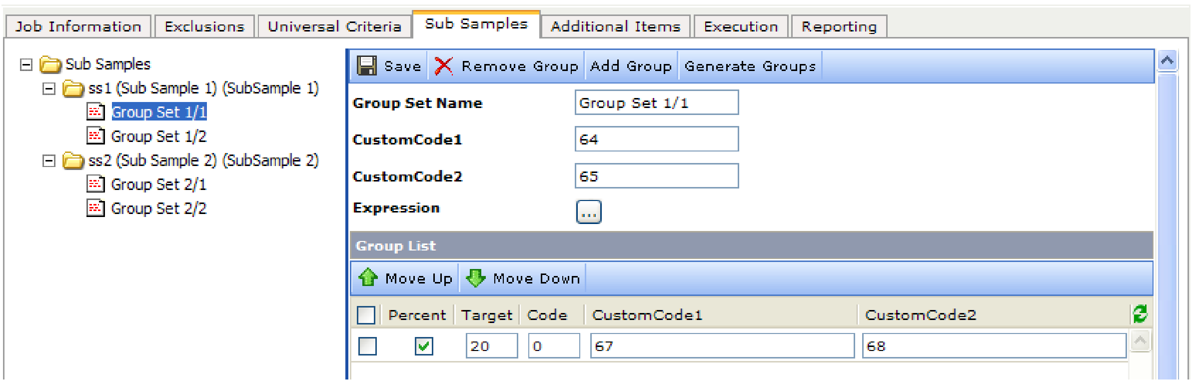


Figure 129 Example of the Group Set editing page

- **Group Set Name** - the name of the group set as it appears in the hierarch column. You can edit this name as required.
- **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 94 for more information).
- **Expression** - 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 92 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 98 for more information).

7.1.4.5. Procedures in the Sub Samples 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 94 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 94 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

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.

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.

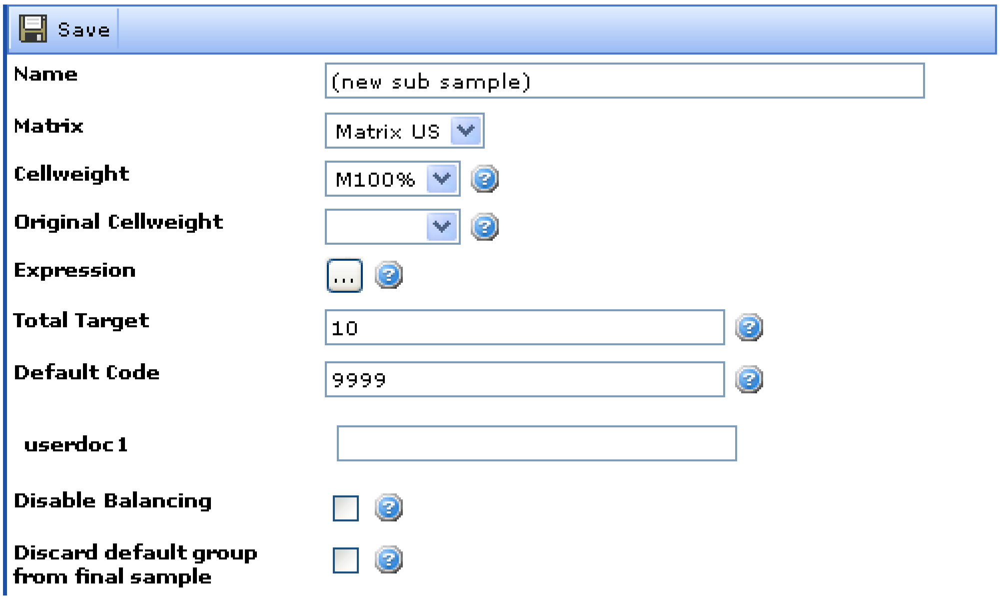


Figure 130 Example of a sub sample editor page

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.

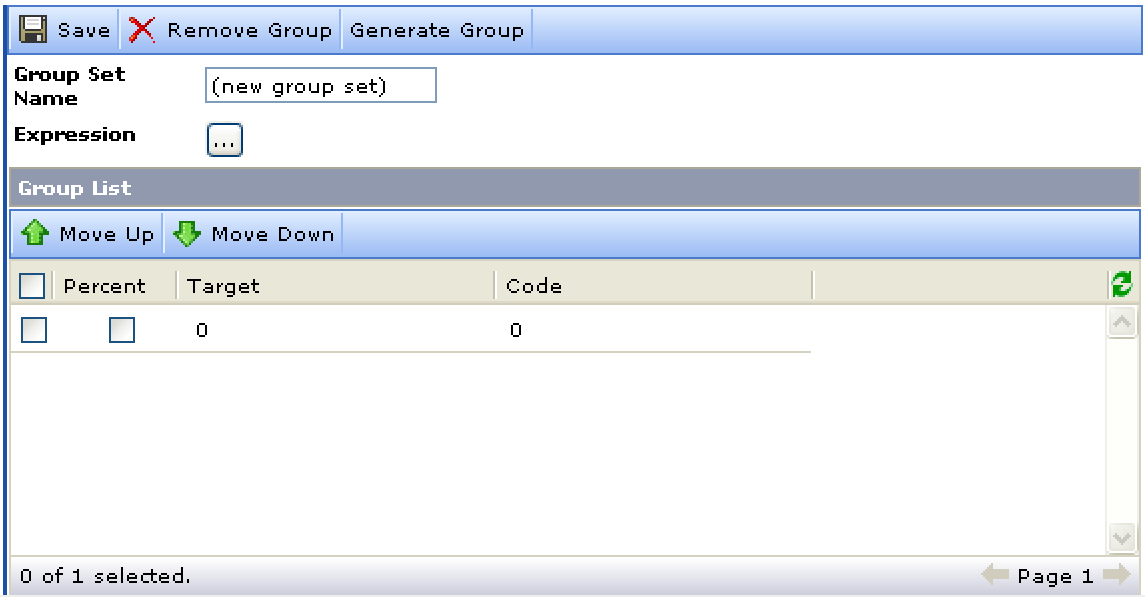


Figure 131 The Group Set Editor page

1. Type the desired name for the new group set into the Group Set Name field.
2. Click **Save** to save the changes and apply the name.

Note: The new Group Set already contains one undefined group. If you only require one group in the Group Set then you need only to fill in the details for this group. In this case, click in the data fields under Target and Code and type in the appropriate details – see below for the field descriptions.

3. If you wish to create more groups, click **Generate Group**.

   The Generate Groups window opens.

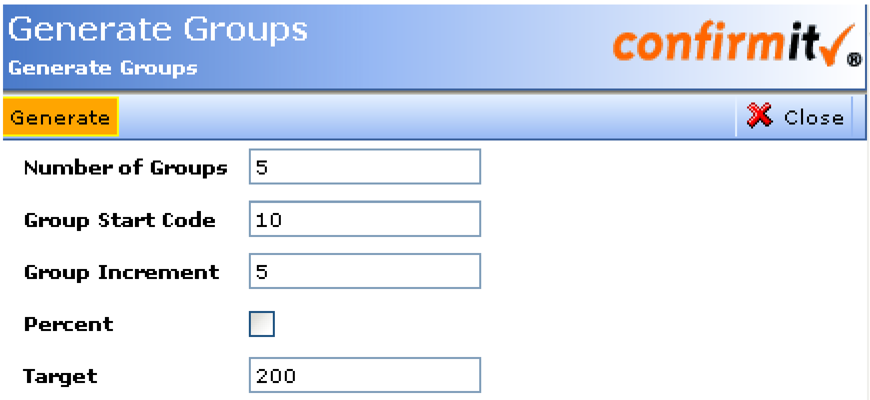


Figure 132 Example of the Generate Groups window

4. Fill in the details. The fields are as follows:
   - **Number of Groups** – the number of groups you wish to create in this operation.
   - **Group Start Code** – each group should have a code number. The number series will be created automatically but the system needs to know where to start. Type in here the first code number to be used.
   - **Group Increment** – The code numbers can be set to increase in increments, for example in steps of 10 (10, 20, 30 etc.). Type the required increment in here.
   - **Percent** – if you want to use a percentage of the total number of suitable people found by the filter instead of a set number, check this box. See also Target below.
   - **Target** – the total number of people you want to have in the group, or the percentage of the total number of people found by the filter. For example, if the filter finds 500 suitable respondents for the group and you type in 50 here, the system will randomly pick out 50 people. If you type in 50 here and also check the Percent box then the system will randomly pick out 50% of 500 = 250 people.
5. Click **Generate** to create the new groups.

   The new groups are added to the Group Set list.
6. Click **Save** to save the changes.

   The figure below shows the Group Set editor page with the new groups created according to the parameters set in the Generate Groups window in the previous figure.

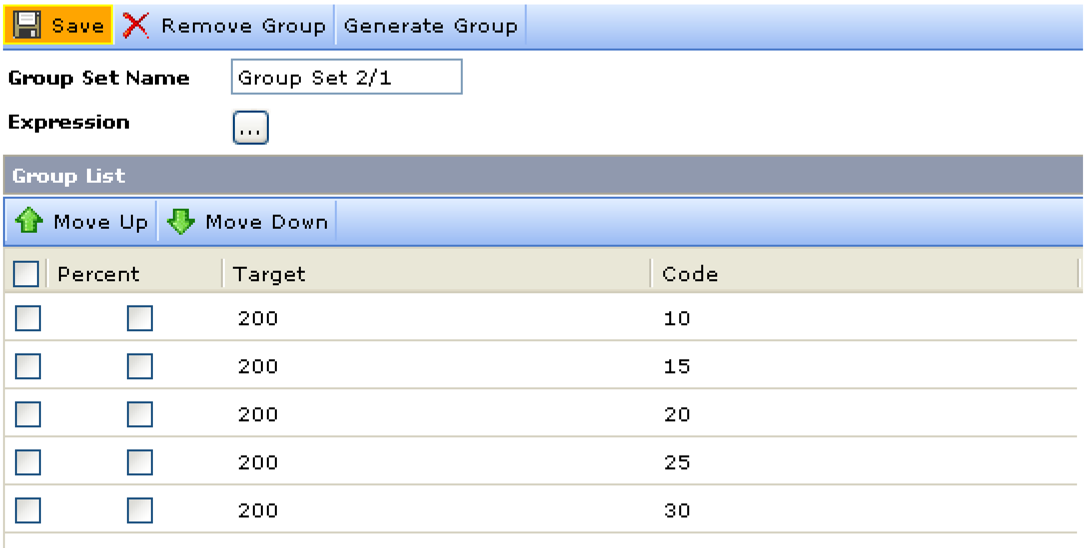


Figure 133 Example of the new groups

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 Additional Items 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 Additional Items tab to specify which other columns of information about the selected panelists are to be included in the text file. The columns included here will define the contents of the results tables that will be available after the survey is completed. To add columns:

1. In the Available Fields list, select the columns you wish to add by clicking in the boxes beside the name.
2. Click **Add**.

   The selected columns are moved to the Selected Fields area.

   Click **Add All** to add all of the columns without having to select them individually. In the Selected Fields area, select a column and click Remove to return it to the Available Fields list.

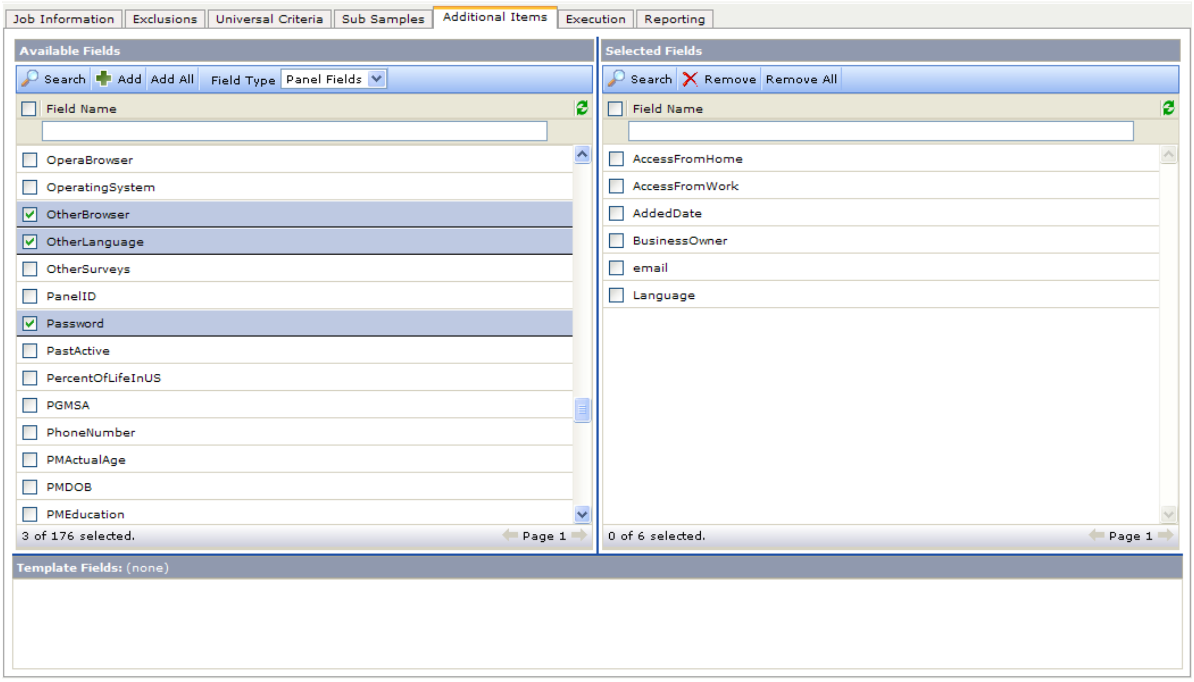


Figure 134 The Additional Items window

The Template Fields area below the main columns lists any columns that are included by default due to the template that is in use (go to The Output Field Templates Tab on page 152 for more information).

7.1.5.1. The Additional Items Tab Toolbar

The toolbar for the Additional Items tab is as shown below.

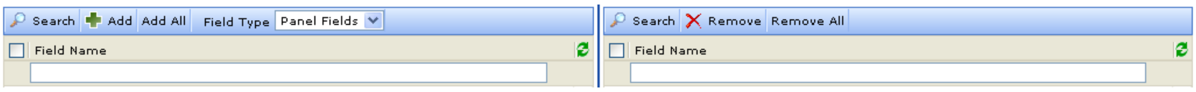


Figure 135 The Additional Items toolbar

- **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.
- **Data fields** – additional fields made available by uploading a matchfile.txt file (go to How to Upload a File on page 80 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.

7.1.5.2. Procedures in the Additional Items 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.

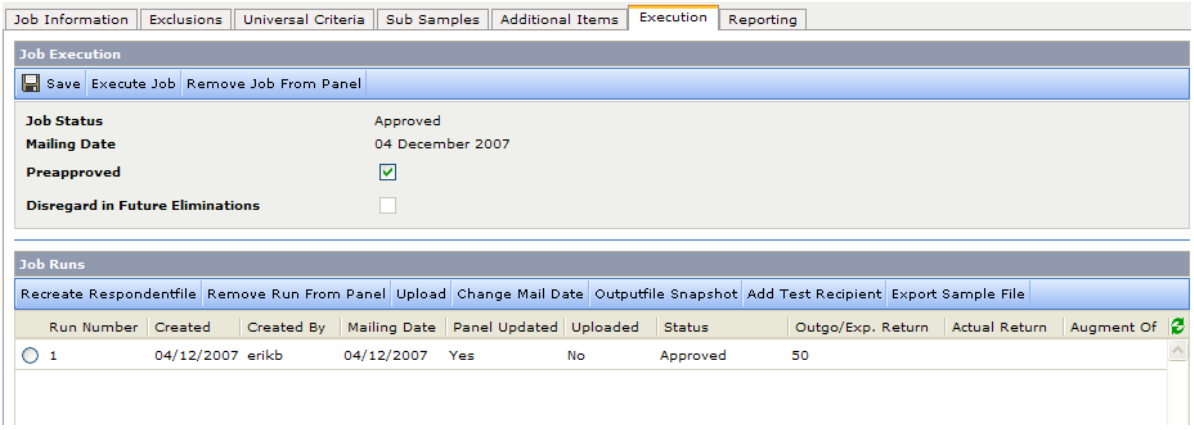


Figure 136 The Execution tab

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 dry 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 114 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 113 for more information).
- Change the mailing date (go to How to Change the Panel Mailing Date on page 115 for more information).
- View a snapshot of the panelists in the sample (go to After the Job has been Executed on page 113 for more information).
- Add test recipients (Tester Templates) (go to Tester Template List on page 147 for more information).
- Export the sample file (go to How to Export the Sample File on page 116 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 113 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 114 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 113 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.

7.1.6.2. The Job Runs Area

This area 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:

- **Recreate Respondent 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 **Recreate Respondent 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 113 for more information).
- **Upload** - click to upload the sample file to a project (go to How to Upload the Output File on page 114 for more information).
- **Change Mail Date** - change the mailing date for the project (go to How to Change the Panel Mailing Date on page 115 for more information).
- **Output File Snapshot** - provides an overview of the first 10 panelists in the sample output file so you can check that the file is correct.
- **Add Test Recipient** - add test respondents to the database (go to How to Add Test Respondents to the Database on page 115 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 116 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 dry 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.

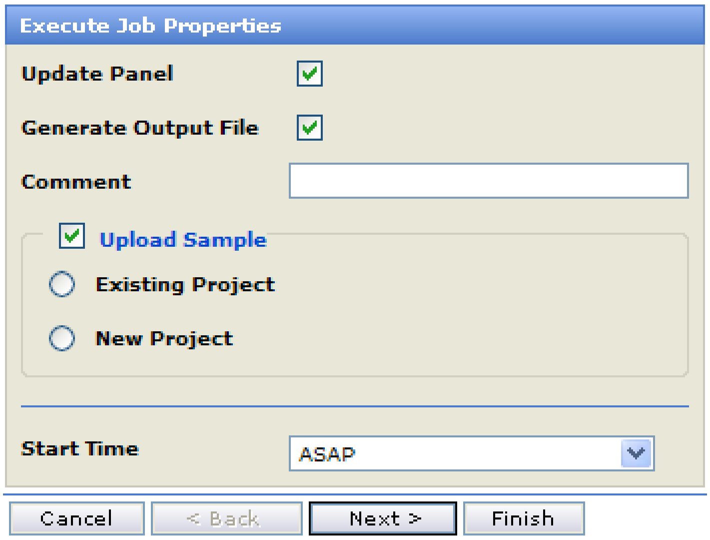


Figure 137 The Execute Job Properties dialog box

- **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 "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 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 109 for more information).
  - **Existing Project** - select this option if you wish to upload the output file to an existing project.
  - **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:
  - **ASAP** – start the job as soon as possible. The job will be queued behind any other jobs awaiting processing in the database, and will be run as soon as the processor is available.
  - **Schedule for later execution** – select this option if you want to run the job execution procedure at a later time. If this option is selected, when you click **OK**, a dialog opens in which you can set the required time and date for the procedure to be run, and whether you want the job to be repeated. See the next section for details.

3. Select the required options and click **Next** or **Finish** as appropriate.

If you have selected to upload the sample, when you click **Next** the Upload Sample Properties page opens (go to The Upload Sample Properties Page on page 109 for more information). If you have not selected to upload the sample, when you click **Finish** the sample selection task begins. While the task is running a Progress and Information window is displayed to keep you informed of progress, as shown in the example below.

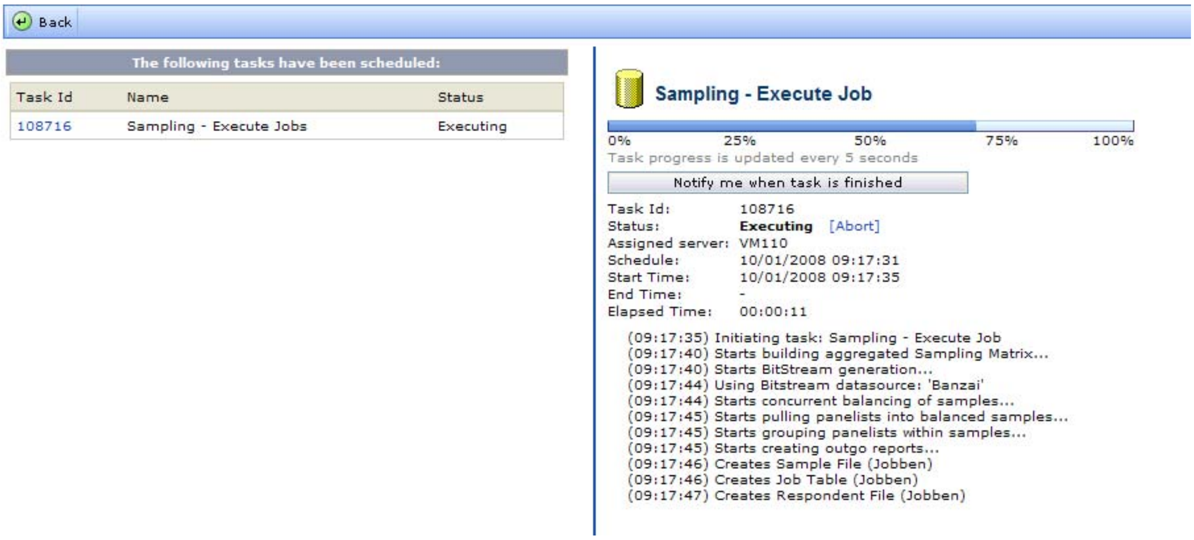


Figure 138 Example of the Execute Job task information page

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 114 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 ate the Recurrence tab.

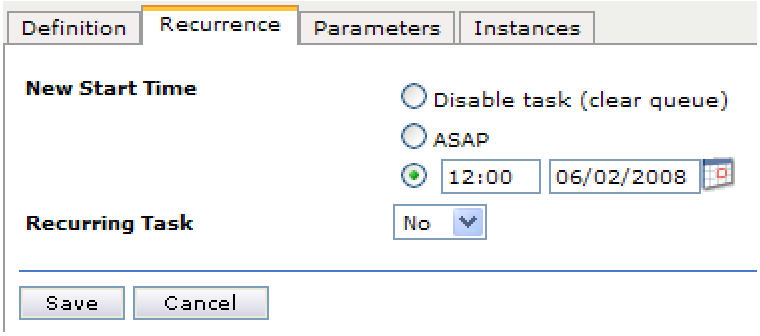


Figure 139 The Recurrence tab

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.

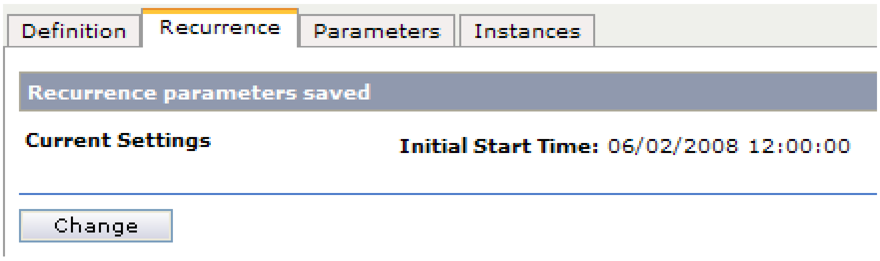


Figure 140 Example of the Recurrence tab when settings are saved

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 106 for more information), click the down-arrow beside the Recurring Task field and select **Yes**.

   The dialog expands to display additional parameters – see the figure below.

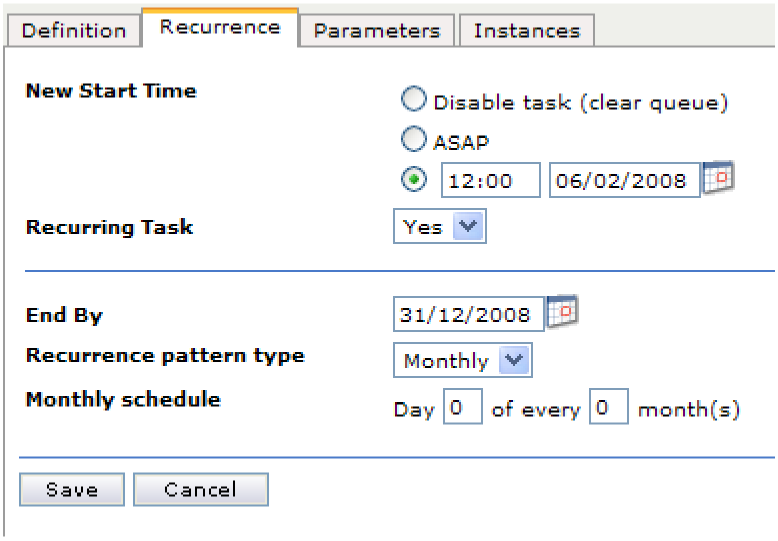


Figure 141 The dialog with the Recurrence function activated

2. In the New Start Time fields, set the time you want the first job execution to be performed.
3. In the Recurrence Pattern Type field, click the down-arrow and select the basic recurrence rate (hourly, daily etc.).

   The "Schedule" area below changes depending on the selection made here. In this area:

   - For hourly recurrences, type in the rate. For example, if you want the job to be executed every 4 hours, type **4** into the box. The job will be first executed at the date and time set in the New Start Time fields, then will be repeated every four hours.
   - For daily recurrences, type in the rate. For example, if you want the job to be executed every 3rd day, type **3** into the box. The job will be first executed at the date and time selected in the New Start Time fields, and will be repeated every third day.
   - For weekly recurrences, type in the rate and select the days of the week on which you want the job to be executed. For example, if you type **2** into the first box and click in the **Monday** and **Friday** boxes to select them, the job will be executed every second week; the first time on the Monday, the next time on the Friday, the next time on the Monday and so on.
   - For monthly recurrences, type in the day of the month and the rate. For example, if you want the job to be executed on the 10th day of every second month, type **10** into the Day box and **2** into the Month box.
4. In the Range of Recurrence fields, set the end-date and time for the recurrences. No recurrences will be performed after this date and time.
5. Click **Save** to save the settings.

   The Recurrence tab changes to display the settings.

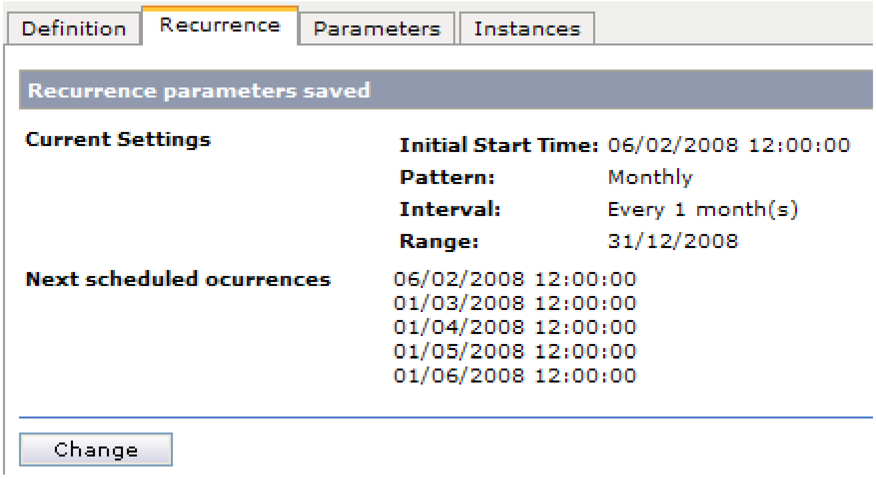


Figure 142 The Recurr tab showing an example of recurring settings

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 112 for more information).

7.1.6.3.4. The Upload Sample Properties Page

When executing a job (go to How to Execute a Job on page 104 for more information), if you select Upload Sample option and click **Next**, the Upload Sample Properties page opens as shown below. This page is where you select the project to which the sample is to be attached,

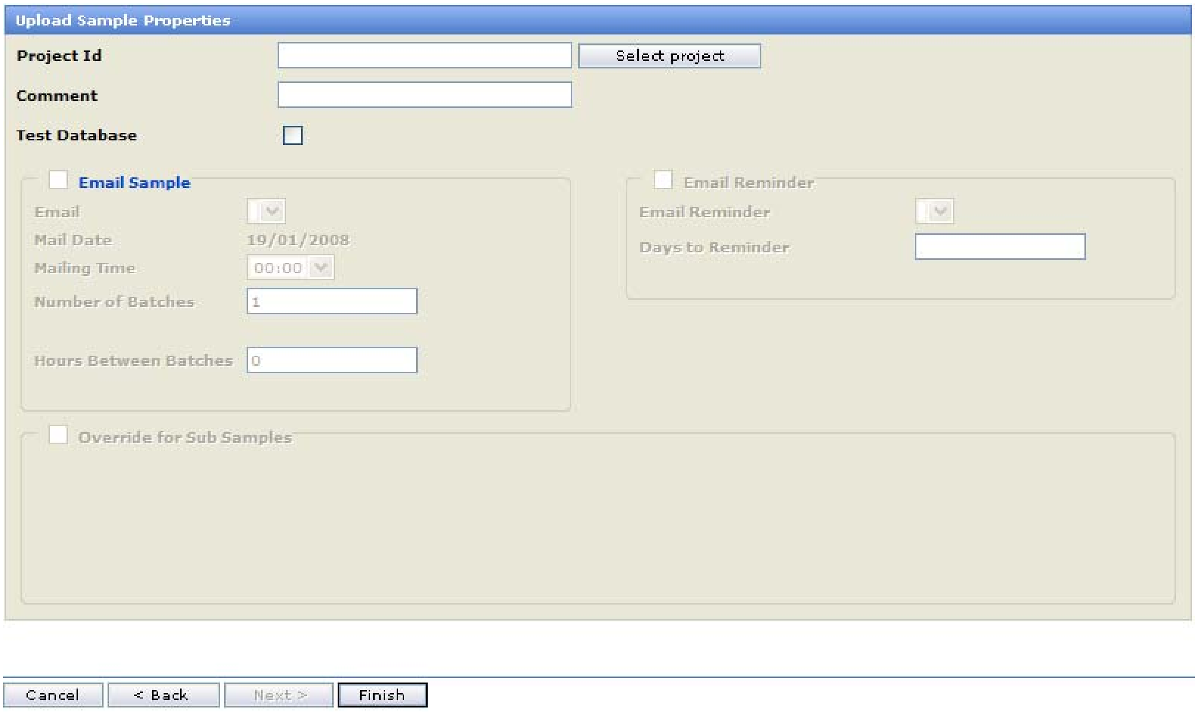


Figure 143 The Upload Sample Properties page

1. Click **Select Project**.

   The Project List window opens.

2. Select the required project from the list and click **OK**.

The window closes and the selected project Id is added to the field. Note that in the event the list is extensive, you can search for the required project using the various search criteria available.

3. Type a comment into the Comment field as required.

4. Click in the Test Database box to select it if you wish to attach the resulting panel to the project's Test database.

   If the selected project contains an email, when you select the Email Sample box the email properties become active.

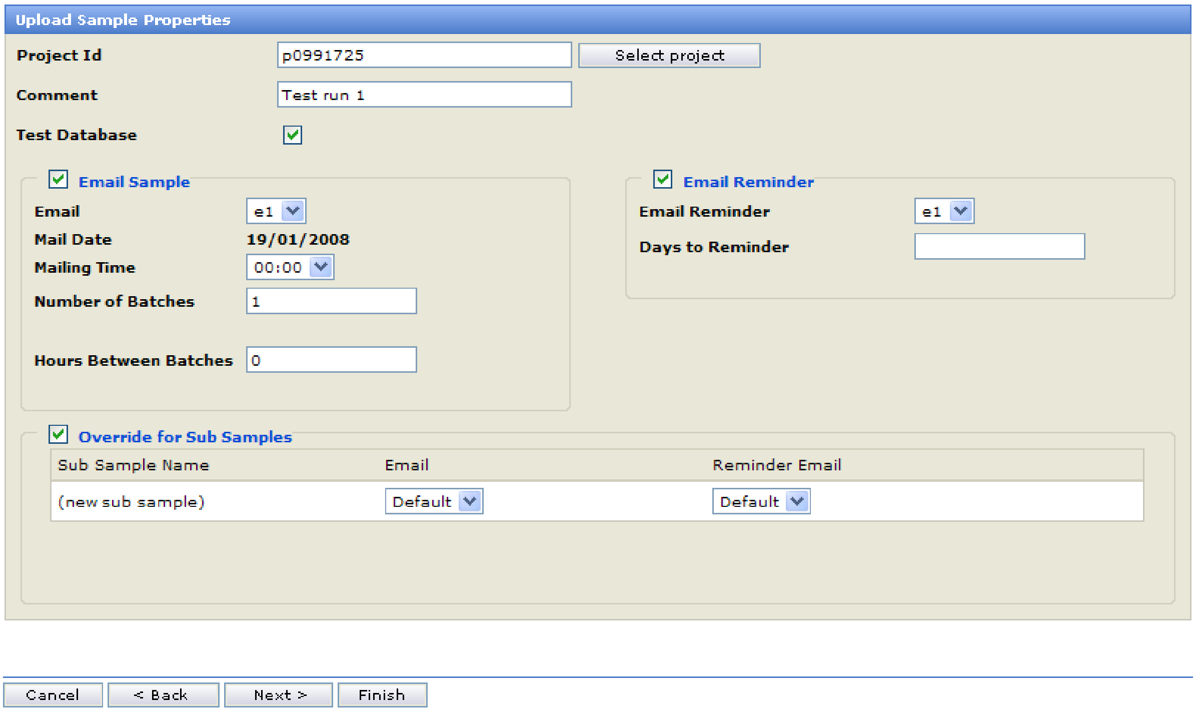


Figure 144 The Upload Sample Properties page with the email section active

- **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 85 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 111 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 109 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.

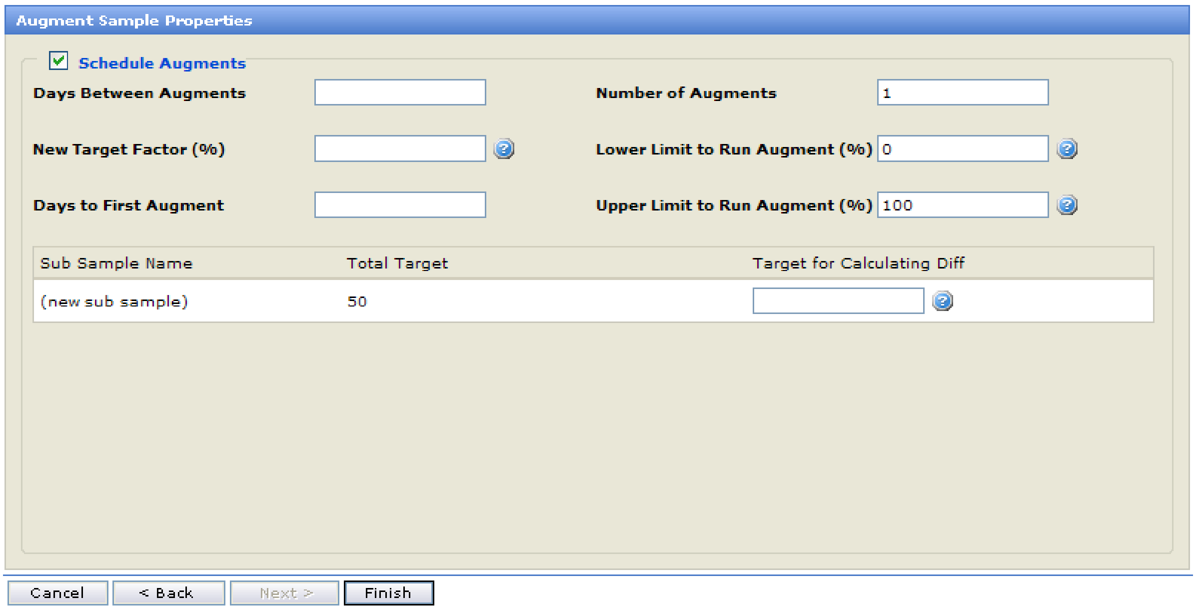


Figure 145 The Augment Sample Properties page

- **Days Between Augments** - the number of days that are to elapse between each augmenting task.
- **Number of Augments** - the number of augmenting tasks that are to be run, if required.
- **New Target factor** - the factor in percent by which the difference between the original total target and the actual return is multiplied. The calculation will be run for each sub sample, and the new total target will be distributed to the groups according to the original ratio. The calculation is: New Total Target = (Total Target - Actual Return) * New Target Factor
- **Lower Limit to Run Augment** - the percent difference between the original target and the actual return must be higher than this limit for the augment to run. The limit is per sub sample.
- **Days to First Augment** - the number of days after the mailing date when the first augment task is to run.
- **Upper Limit to Run Augment** - the percent difference between the original target and the actual return must be lower than this limit for the augment to run. The limit is per sub sample.
- **Target for Calculating Diff.** - the target used for calculating the difference between the target and the actual return instead of the original total target. The calculation is:

  New Total Target = (Target for Calculation Diff - Actual Return) * New Target Factor.

7.1.6.3.6. How to Change the Execution Settings

Once a job execution task is set up and activated, the job will be listed in the Tasks list. If you wish to make changes to the task, execution time or recurrence sequence, proceed as follows:

1. In the Quick Access pane, go to the **Tasks** menu command.

   The Tasks window opens listing all the tasks that are scheduled to run, with the task to be performed first at the top.

Note: The list will include tasks for all projects to which you have access. To restrict the list to the tasks for one project, type the project ID into the appropriate search field and click Search (go to The Tasks Management Page on page 15 for more information).

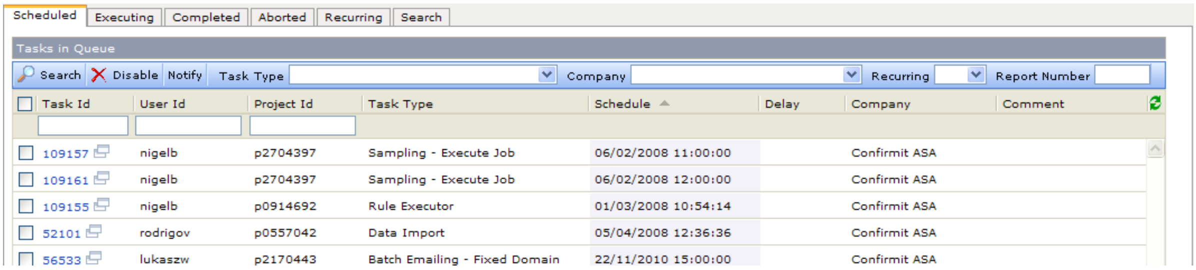


Figure 146 Example of a Task List

2. Click the blue Task ID link for the task you wish to change.

   The Execute Job window opens for that job, showing the instances for the job.

3. Go to the Recurrence tab, and click **Change**.

   The tab changes to show the current details of the job.

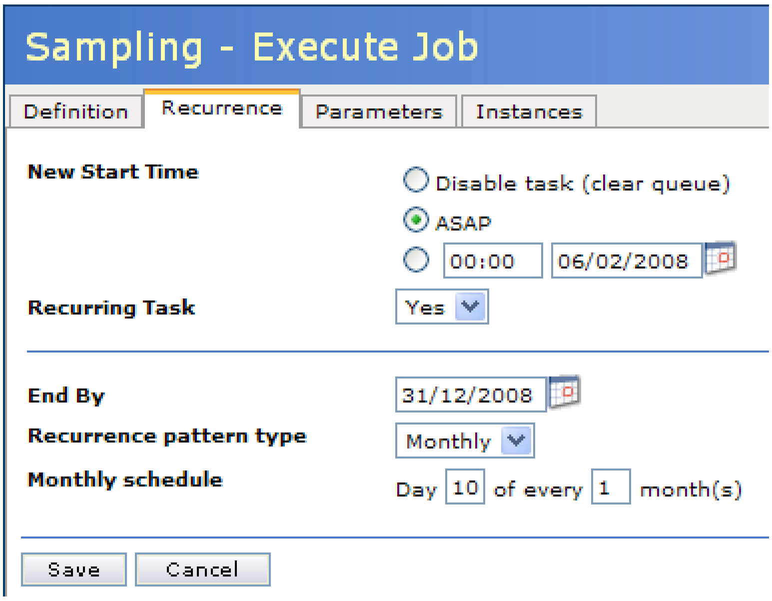


Figure 147 The Execute Job > Recurrence tab ready for changing

Here you can make the required changes to the job (go to How to Change the Job Schedule Settings on page 143 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 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 143 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 104 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 118 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 114 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 as shown below.

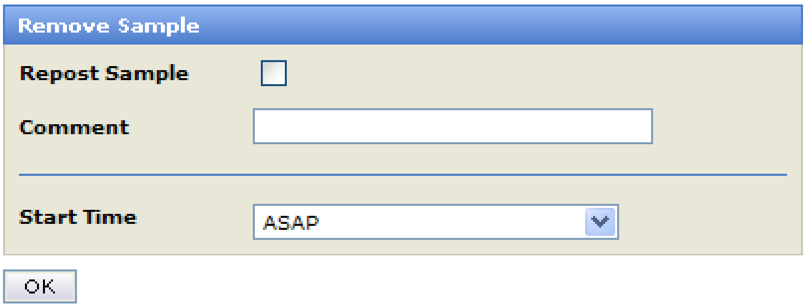


Figure 148 The Remove Sample dialog

- **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 113 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 as shown below.

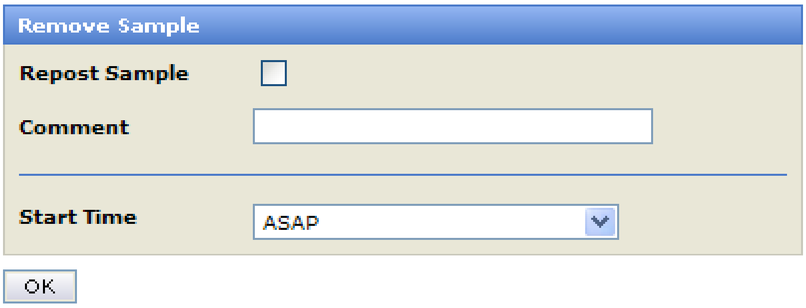


Figure 149 The Remove Sample dialog

- **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 109 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.

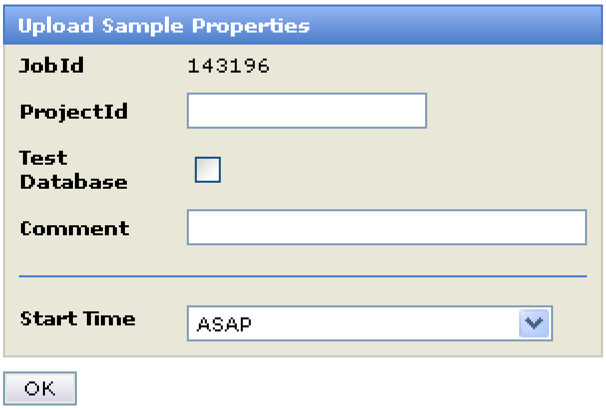


Figure 150 The Upload Sample Properties dialog box

- **Project ID** – the ID number of the project into which you wish to load the sample file.
- **Test Database** – check to load the data file into a test database such that you can test the survey.
- **Comment** – free text field for general comments.
- **Start Time** – select when you want the sample file to be uploaded (go to How to Set the Execution Time/Date for a Job on page 106 for more information).

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 Confirmit User manual 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.

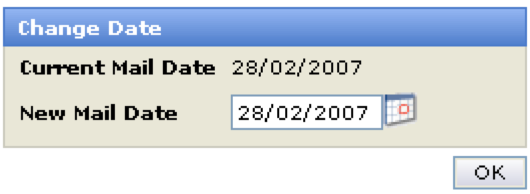


Figure 151 Example of the Change Date dialog

3. Set the date as required.
4. Click **OK**.

7.1.6.4.5. How to Add Test Respondents to the Database

Once a job has been executed for the first time, the **Add Test Recipient** button appears in the tab's toolbar. To add a tester template to the database:

1. Click the **Add Test Recipient** 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 147 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 as shown below.

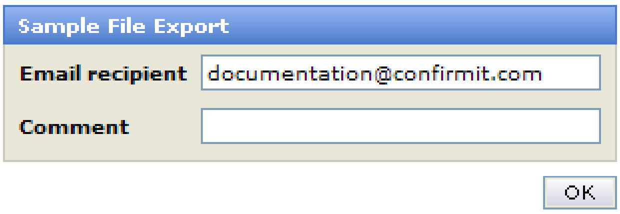


Figure 152 The Sample File Export dialog

3. The Email Recipient field contains the email address registered for the current user. Change this as required.
4. Type a comment into the Comment field if required and click **OK**.

   The sample file created by the selected job is zipped, attached to an email and sent to the specified address.

7.1.6.5. The Task Definition Properties Dialog

Use this dialog to set up recurring jobs, and to view the details of jobs that are already set up to run at some point in the future. The tabs in the dialog are:

- **Properties**– provides general information on the selected job, and allows you to enter comments on the job.

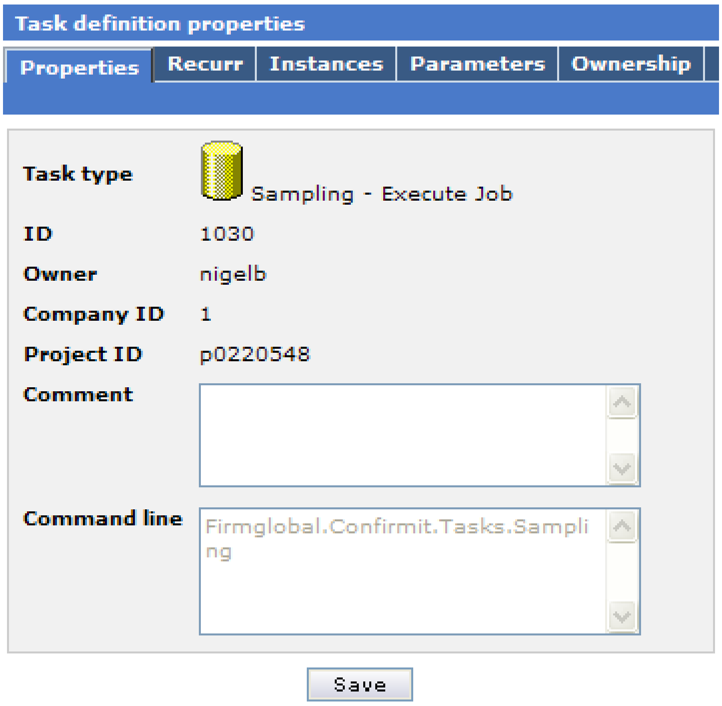


Figure 153 Example of the Properties tab

- **Recurr** – once the settings have been saved, this tab displays the initial settings for the current job and the dates and times of any recurrences.
- **Instances** – One job scheduled for execution can have several instances (recurrences). The Instances tab lists those recurrences that have been completed, and the next recurrence scheduled to be performed. Click on the link in the Schedule column to check the details for each recurrence.

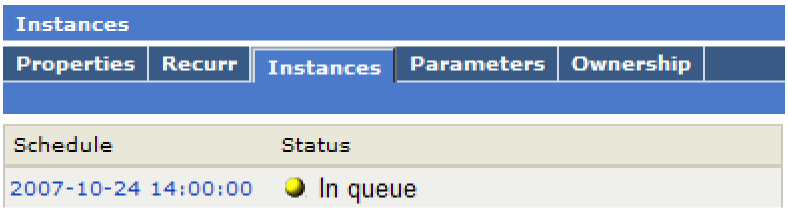


Figure 154 Example of the Instances tab

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

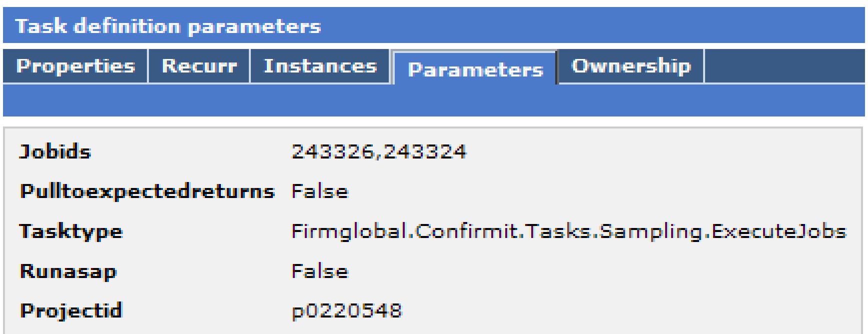


Figure 155 Example of the Parameters tab

- **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.

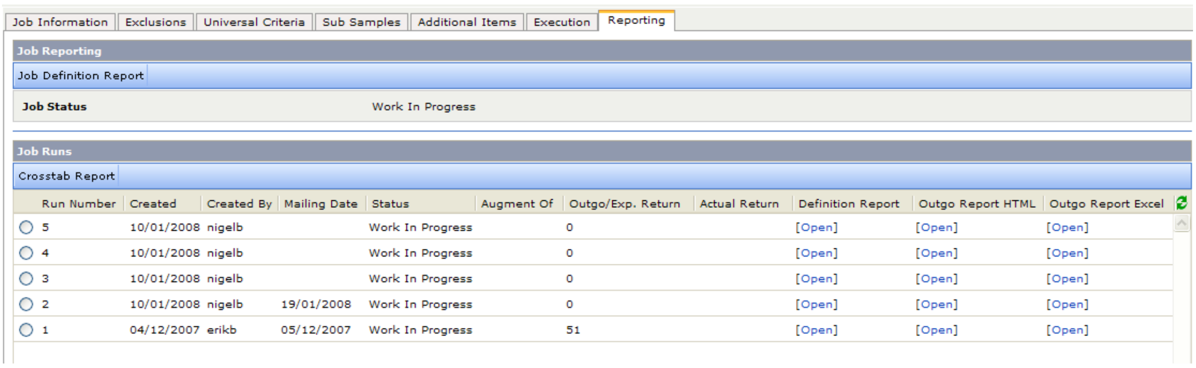


Figure 156 Example of the Reporting tab

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 118 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 120 for more information).

7.1.7.1. The Job Reporting Area

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

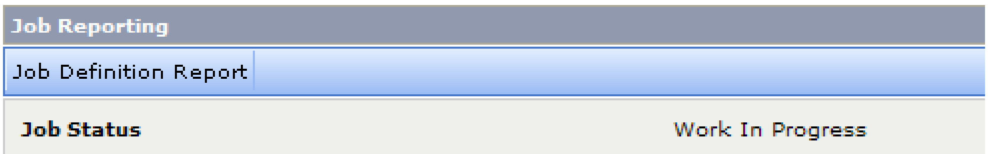
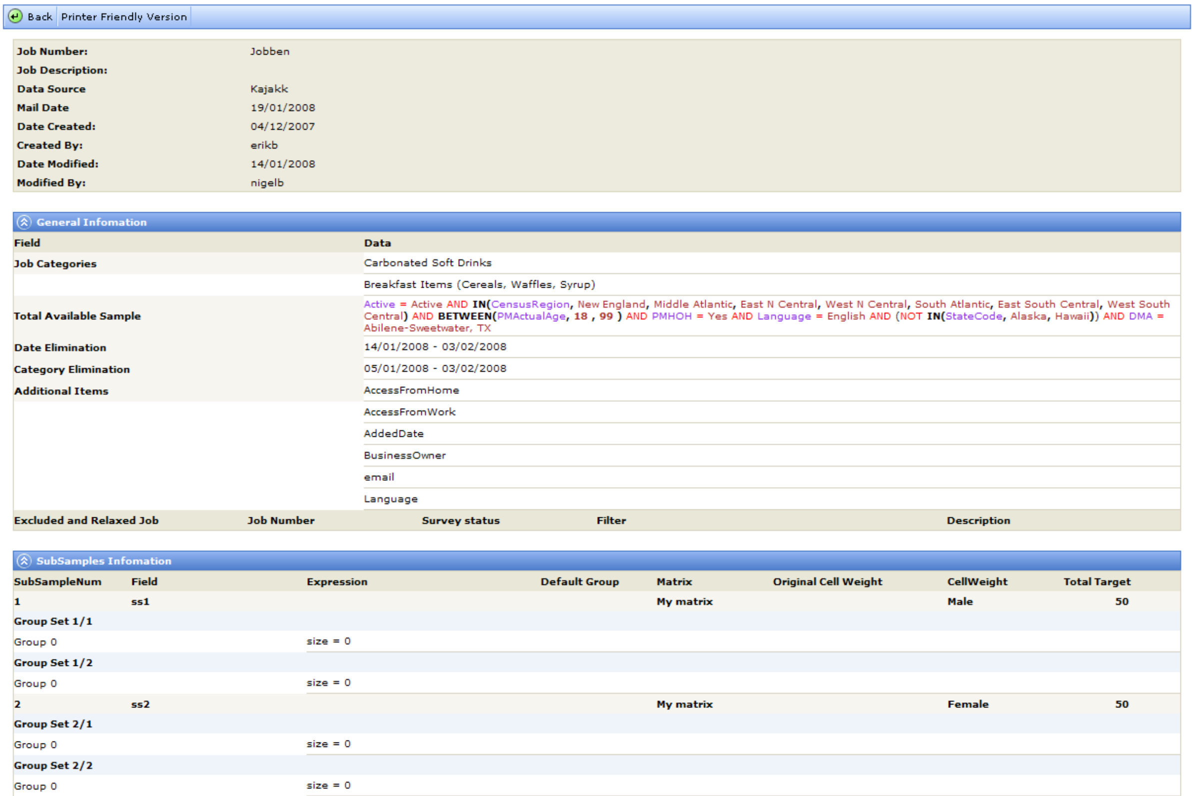


Figure 157 The Job Reporting area on the Reporting tab

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	Kajakk
Mail Date	19/01/2008
Date Created:	04/12/2007
Created By:	erikb
Date Modified:	14/01/2008
Modified By:	nigelb

General Infomation

Field	Data
Job Categories	Carbonated Soft Drinks
	Breakfast Items (Cereals, Waffles, Syrup)
Total Available Sample	Active = Active AND **IN(**CensusRegion, New England, Middle Atlantic, East N Central, West N Central, South Atlantic, East South Central, West South Central**)** AND **BETWEEN(**PMActualAge, **18** , **99** **)** AND PMHOH = Yes AND Language = English AND (NOT **IN(**StateCode, Alaska, Hawaii**)**) AND DMA = Abilene-Sweetwater, TX
Date Elimination	14/01/2008 - 03/02/2008
Category Elimination	05/01/2008 - 03/02/2008
Additional Items	AccessFromHome
	AccessFromWork
	AddedDate
	BusinessOwner
	email
	Language

Excluded and Relaxed Job	Job Number	Survey status	Filter	Description

SubSamples Infomation

SubSampleNum	Field	Expression	Default Group	Matrix	Original Cell Weight	CellWeight	Total Target
1	**ss1**			**My matrix**		**Male**	**50**
Group Set 1/1							
Group 0		size = 0					
Group Set 1/2							
Group 0		size = 0					
2	**ss2**			**My matrix**		**Female**	**50**
Group Set 2/1							
Group 0		size = 0					
Group Set 2/2							
Group 0		size = 0					

Figure 158 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 119 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 120 for more information).
- **Sub Sample Information** – details of the sub samples defined (go to The SubSamples Information Area on page 120 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:	Jobben
Job Description:	
Data Source	Kajakk
Mail Date	19/01/2008
Date Created:	04/12/2007
Created By:	erikb
Date Modified:	11/01/2008
Modified By:	nigelb

Figure 159 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 Infomation

Field	Data
Job Categories	Carbonated Soft Drinks
	Breakfast Items (Cereals, Waffles, Syrup)
Total Available Sample	Active = Active AND IN(CensusRegion, New England, Middle Atlantic, East N Central, West N Central, South Atlantic, East South Central, West South Central) AND BETWEEN(PMActualAge, 18 , 99) AND PMHOH = Yes AND Language = English AND (NOT IN(StateCode, Alaska, Hawaii)) AND DMA = Abilene-Sweetwater, TX
Date Elimination	14/01/2008 - 03/02/2008
Category Elimination	05/01/2008 - 03/02/2008
Additional Items	AccessFromHome
	AccessFromWork
	AddedDate
	BusinessOwner
	email
	Language

Excluded and Relaxed Job	Job Number	Survey status	Filter	Description

Figure 160 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 Infomation

SubSampleNum	Field	Expression	Default Group	Matrix	Original Cell Weight	CellWeight	Total Target
1	ss1			My matrix		Male	50
Group Set 1/1							
Group 0		size = 0					
Group Set 1/2							
Group 0		size = 0					
2	ss2			My matrix		Female	50
Group Set 2/1							
Group 0		size = 0					
Group Set 2/2							
Group 0		size = 0					

Figure 161 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

Run Number	Created	Created By	Mailing Date	Status	Augment Of	Outgo/Exp. Return	Actual Return	Definition Report	Outgo Report HTML	Outgo Report Excel
5	10/01/2008	nigelb		Work In Progress		0		[Open]	[Open]	[Open]
4	10/01/2008	nigelb		Work In Progress		0		[Open]	[Open]	[Open]
3	10/01/2008	nigelb		Work In Progress		0		[Open]	[Open]	[Open]
2	10/01/2008	nigelb	19/01/2008	Work In Progress		0		[Open]	[Open]	[Open]
1	04/12/2007	erikb	05/12/2007	Work In Progress		51		[Open]	[Open]	[Open]

Figure 162 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 121 for more information).
- **Definition Report** - specifies the job definition at the moment the run was executed (go to The Definition Report on page 122 for more information).
- **Outgo Report HTML** - provides the outgo report in HTML format (go to The Outgo Report HTML on page 123 for more information).
- **Outgo Report Excel** - provides the outgo report in Excel format (go to The Outgo Report Excel on page 124 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 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.

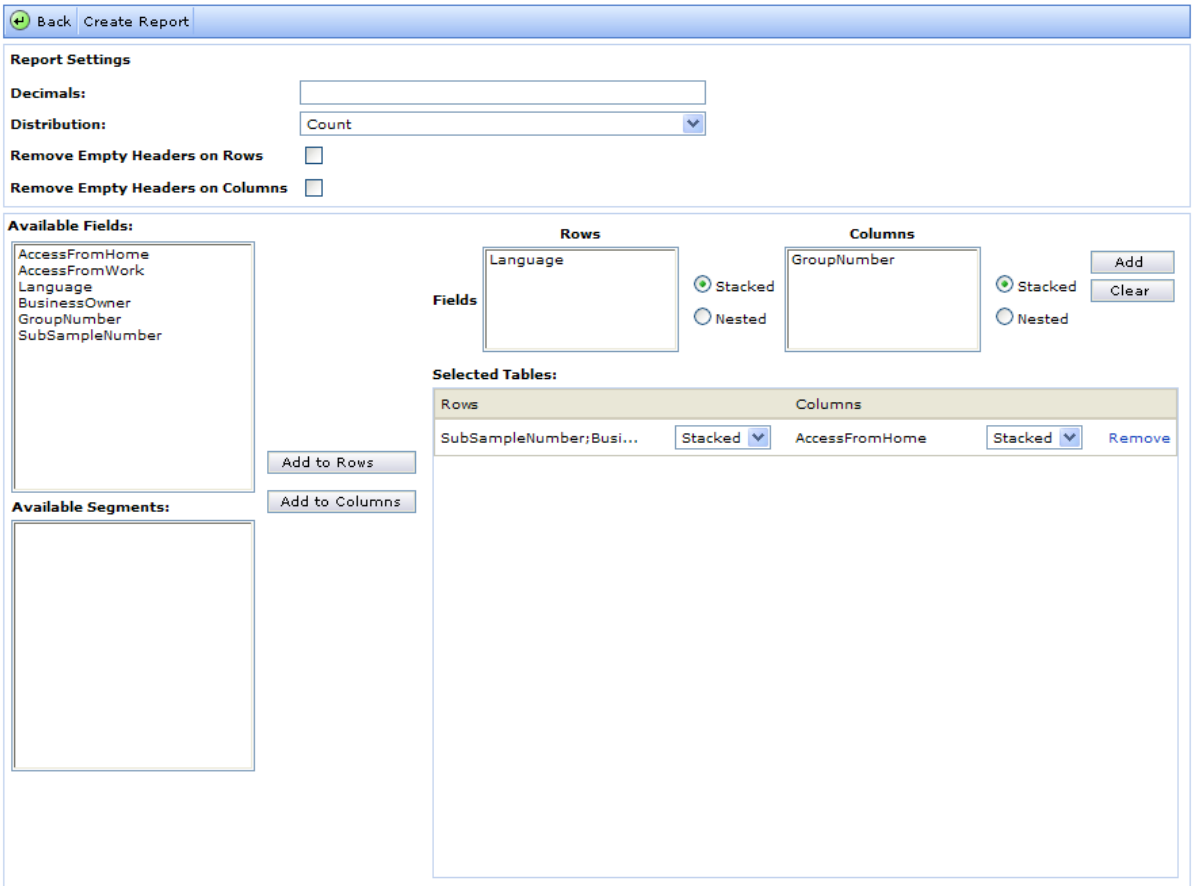
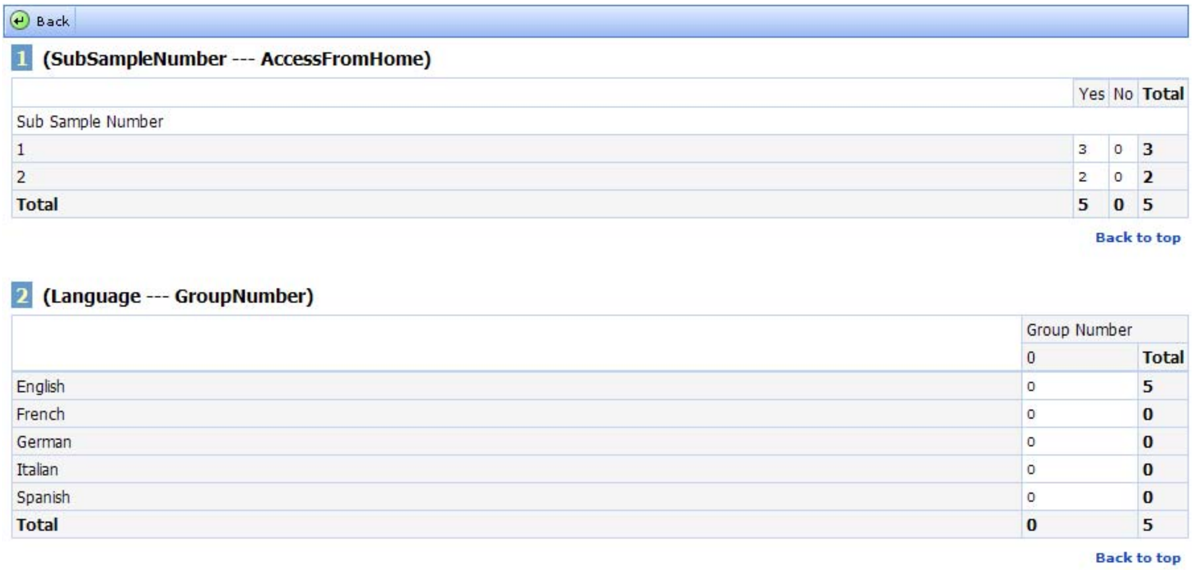


Figure 163 Example of a Crosstab Report under construction

- **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.



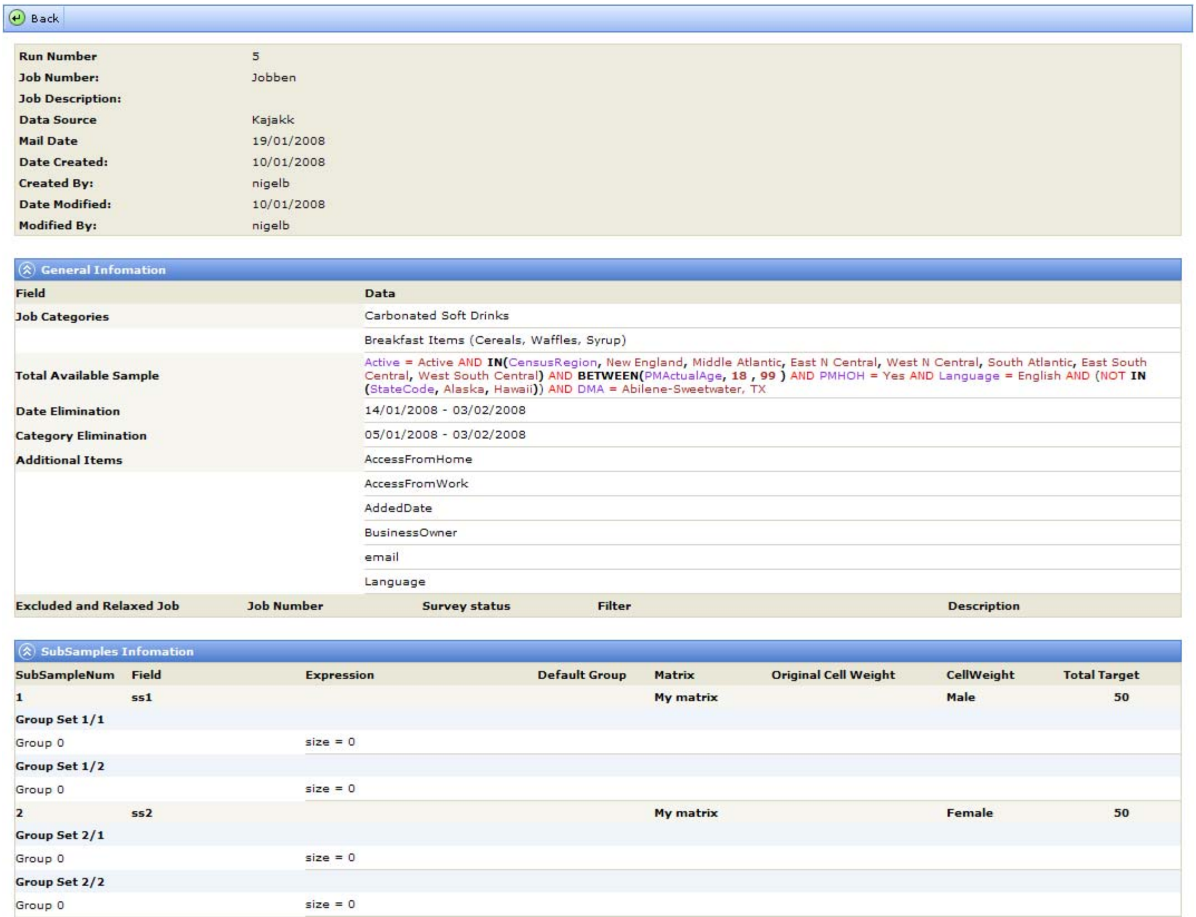
	Yes	No	Total
Sub Sample Number			
1	3	0	3
2	2	0	2
Total	5	0	5

	Group Number	
	0	Total
English	0	5
French	0	0
German	0	0
Italian	0	0
Spanish	0	0
Total	0	5

Figure 164 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 118 for more information).



Back

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

General Infomation

Field	Data
Job Categories	Carbonated Soft Drinks
	Breakfast Items (Cereals, Waffles, Syrup)
Total Available Sample	Active = Active AND IN(CensusRegion, New England, Middle Atlantic, East N Central, West N Central, South Atlantic, East South Central, West South Central) AND BETWEEN(PMActualAge, 18 , 99) AND PMHOH = Yes AND Language = English AND (NOT IN (StateCode, Alaska, Hawaii)) AND DMA = Abilene-Sweetwater, TX
Date Elimination	14/01/2008 - 03/02/2008
Category Elimination	05/01/2008 - 03/02/2008
Additional Items	AccessFromHome
	AccessFromWork
	AddedDate
	BusinessOwner
	email
	Language

Excluded and Relaxed Job	Job Number	Survey status	Filter	Description

SubSamples Infomation

SubSampleNum	Field	Expression	Default Group	Matrix	Original Cell Weight	CellWeight	Total Target
1	ss1			My matrix		Male	50
Group Set 1/1							
Group 0		size = 0					
Group Set 1/2							
Group 0		size = 0					
2	ss2			My matrix		Female	50
Group Set 2/1							
Group 0		size = 0					
Group Set 2/2							
Group 0		size = 0					

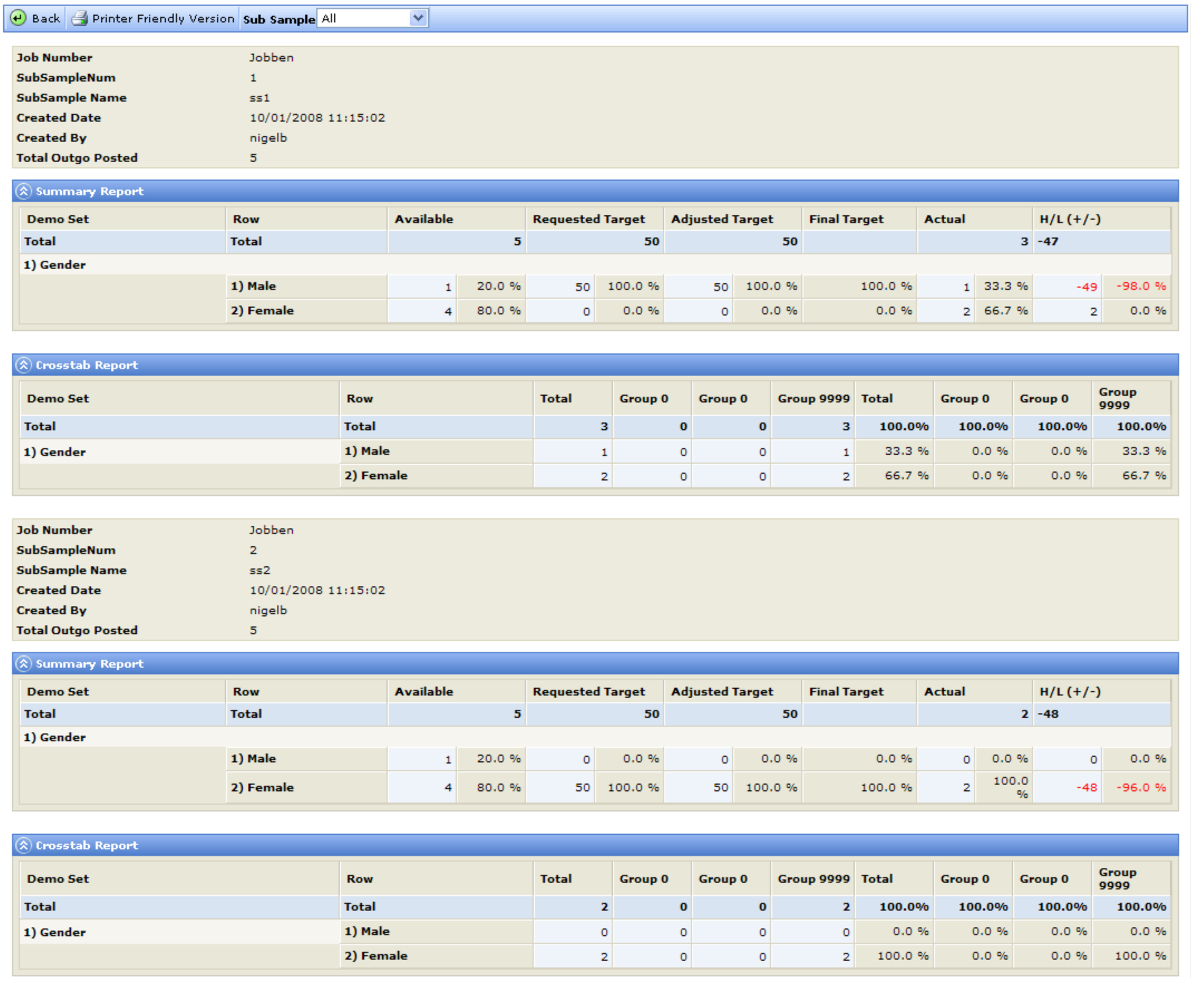
Figure 165 Example of a Definition Report

The Definition Report report comprises three areas:

- **Job Details** – the job number, status etc (go to The Job Details Area on page 119 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 120 for more information).
- **Sub Sample Information** – details of the sub samples defined (go to The SubSamples Information Area on page 120 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

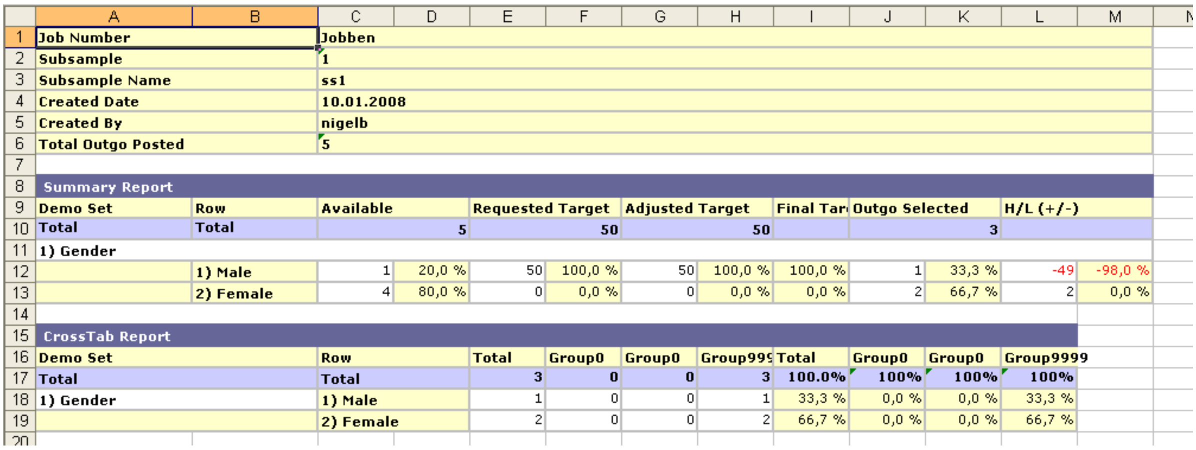
Demo Set	Row	Total	Group 0	Group 0	Group 9999	Total	Group 0	Group 0	Group 9999
Total	Total	2	0	0	2	100.0%	100.0%	100.0%	100.0%
1) Gender	1) Male	0	0	0	0	0.0 %	0.0 %	0.0 %	0.0 %
	2) Female	2	0	0	2	100.0 %	0.0 %	0.0 %	100.0 %

Figure 166 Example of an Outgo Report HTML

- Click **Back** to return to the Reporting tab.
- **Printer Friendly version** – opens a new window containing a version of the report that is set up for printing.
- **Sub Sample**– the information is presented separately for each sub-sample. Use this field to filter the sub sample details that you want to be displayed. Select between the various sub samples that are included in the job, or All.

7.1.7.2.4. The Outgo Report Excel

This option allows you to create Outgo reports in Excel format, as shown in the example below.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Job Number		Jobben										
2	Subsample		1										
3	Subsample Name		ss1										
4	Created Date		10.01.2008										
5	Created By		nigelb										
6	Total Outgo Posted		5										
7													
8	Summary Report												
9	Demo Set	Row	Available		Requested Target		Adjusted Target		Final Tar	Outgo Selected		H/L (+/-)	
10	Total	Total		5		50		50			3		
11	1) Gender												
12		1) Male	1	20,0 %	50	100,0 %	50	100,0 %	100,0 %	1	33,3 %	-49	-98,0 %
13		2) Female	4	80,0 %	0	0,0 %	0	0,0 %	0,0 %	2	66,7 %	2	0,0 %
14													
15	CrossTab Report												
16	Demo Set		Row		Total	Group0	Group0	Group999	Total	Group0	Group0	Group9999	
17	Total		Total		3	0	0	3	100.0%	100%	100%	100%	
18	1) Gender		1) Male		1	0	0	1	33,3 %	0,0 %	0,0 %	33,3 %	
19			2) Female		2	0	0	2	66,7 %	0,0 %	0,0 %	66,7 %	
20													

Figure 167 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** – gives the general details for the matrix.
- **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.

7.2.1. The General Tab

This tab provides general information about the selected matrix.

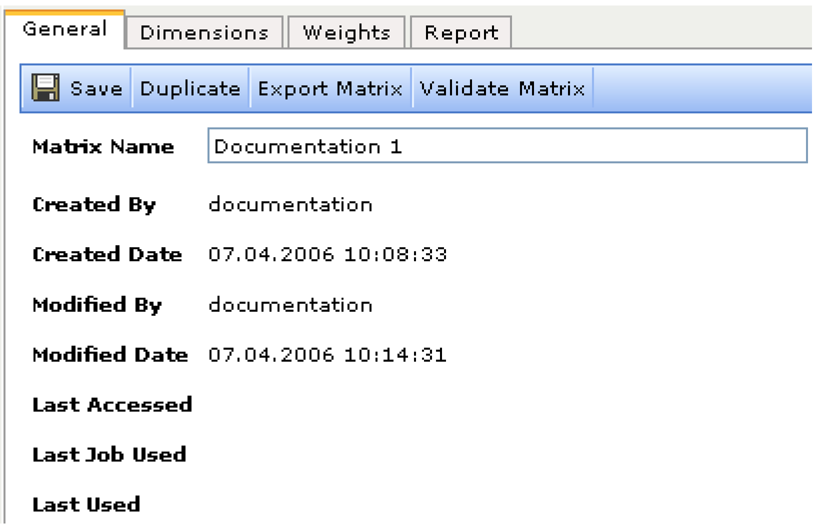


Figure 168 The Current Matrix > General tab

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.

7.2.2. The Dimensions Tab

A Dimension is a set of segments (answer options). For example, “Gender” would be a dimension, and within that dimension would be the segments “Male” and “Female”.

Go to the **Sample Management > Current Matrix** window, Dimensions tab. This tab lists the dimensions registered for the currently selected matrix.

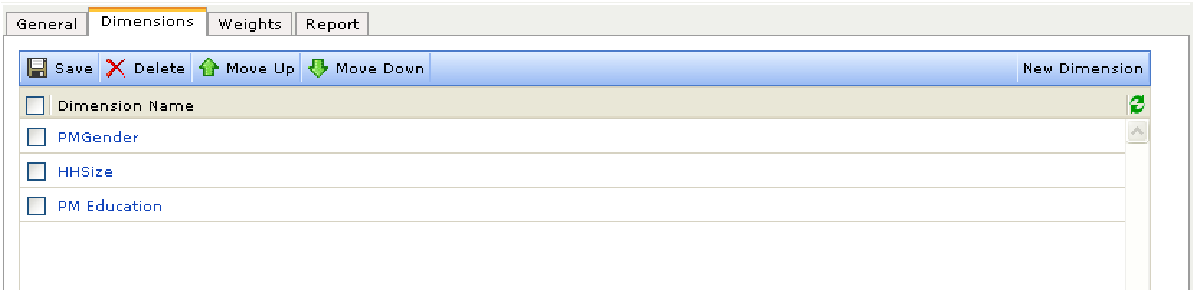


Figure 169 Example of the Dimensions tab list

The toolbar buttons are:

- **Save** – saves changes for the tab. The button flashes while Confirmit has unsaved changes.
- **Delete** – deletes selected Dimensions.
- **Move Up/Down** – moves selected Dimensions up or down in the list.
- **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 to open the Details page for that dimension.

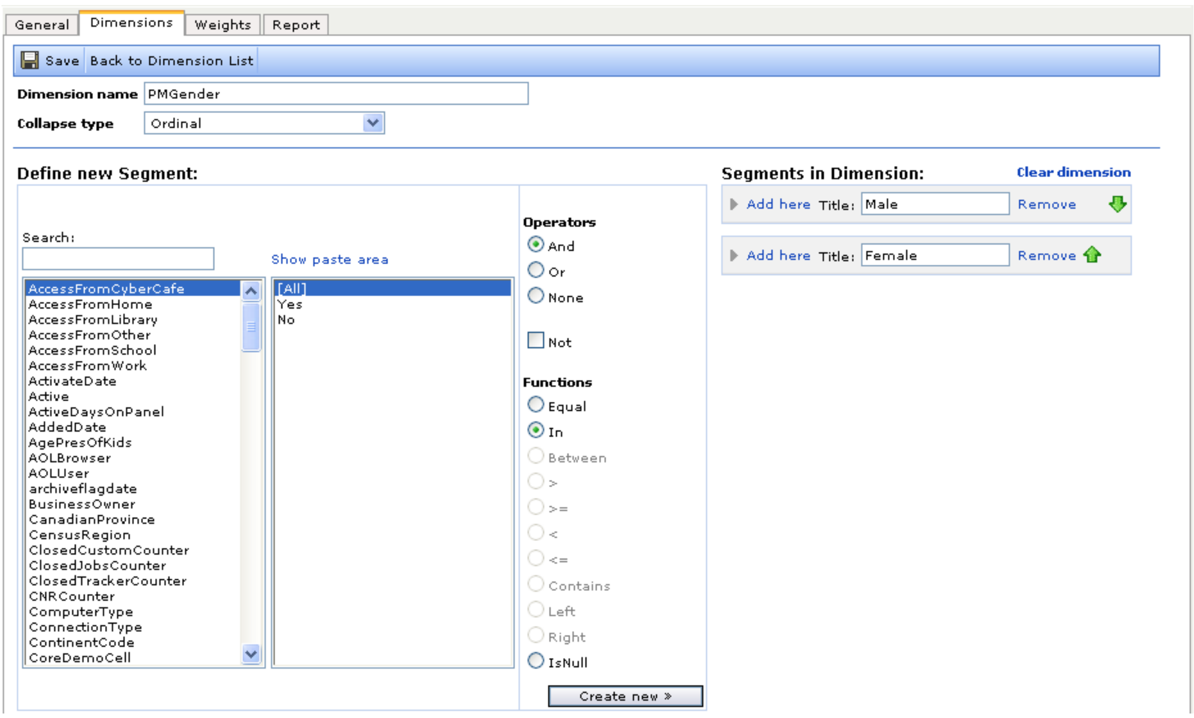


Figure 170 Example of a Details page for a dimension

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.
- **Dimension Name** – the name of the selected dimension.
- **Collapse Type** – sets the action to be performed if Confirmit cannot find the required number of panelists using the weights as set. The options are:
- **Nominal** – Nominal data is a form of categorical data where the order of the categories is not significant. For example industry ("Accommodation, Cafes and Restaurants", "Agriculture, Forestry and Fishing", "Communication Services" ,...), gender, ethnicity etc. In shortage scenarios, adjustments are accomplished by random selections from the other options.
- **Ordinal** – 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, adjustments are accomplished by selecting from the options nearest to the one that is low.
- **Non-collapsing adjust targets** – Confirmit will adjust the total number of panelists selected to keep the weight ratios correct.
- **Non-collapsing keep targets** – Confirmit will adjust the weight ratios to keep the overall total number of panelists correct.

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.

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.

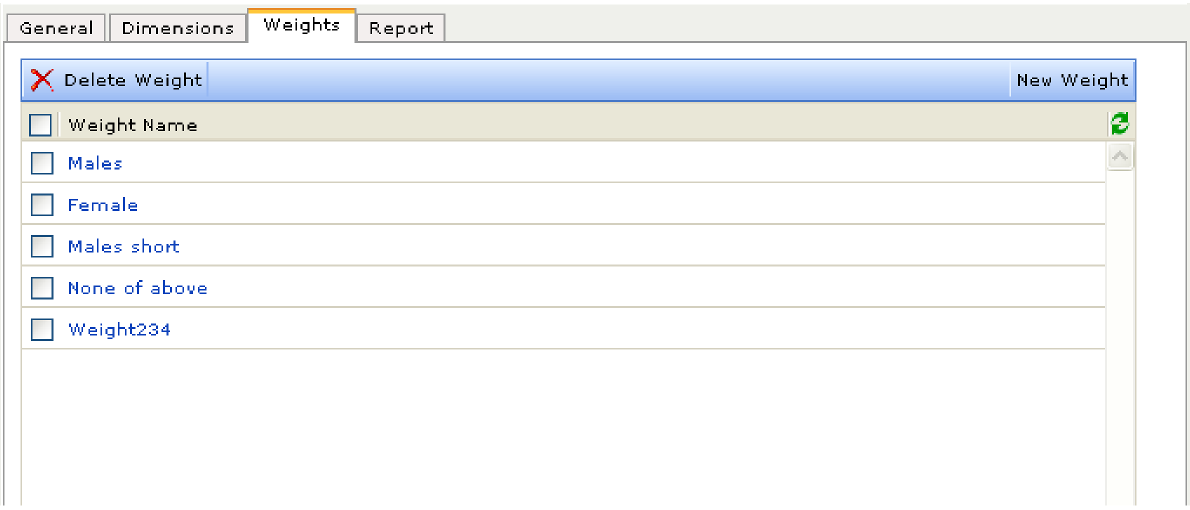


Figure 171 Example of the Weights tab Weight List

The toolbar buttons are:

- **Delete Weight** – deletes selected Weights.
- **New Weight** – creates a new Weight for the current Dimension.
- **Refresh** – refreshes the display. This may be required in the event changes have been made to the list that are not displayed immediately.

Click on a Weight Name in the list to open the details page for that weight.

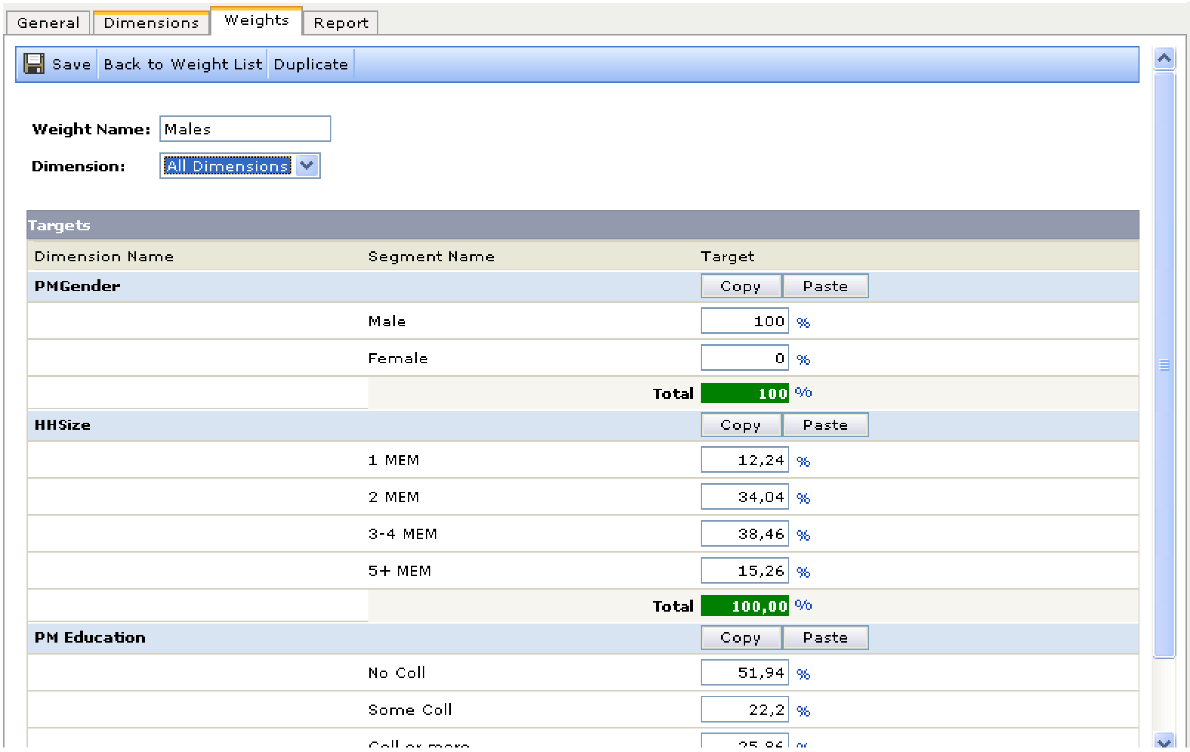


Figure 172 Example of a Weight Details page

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.

7.2.4. The Report Tab

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

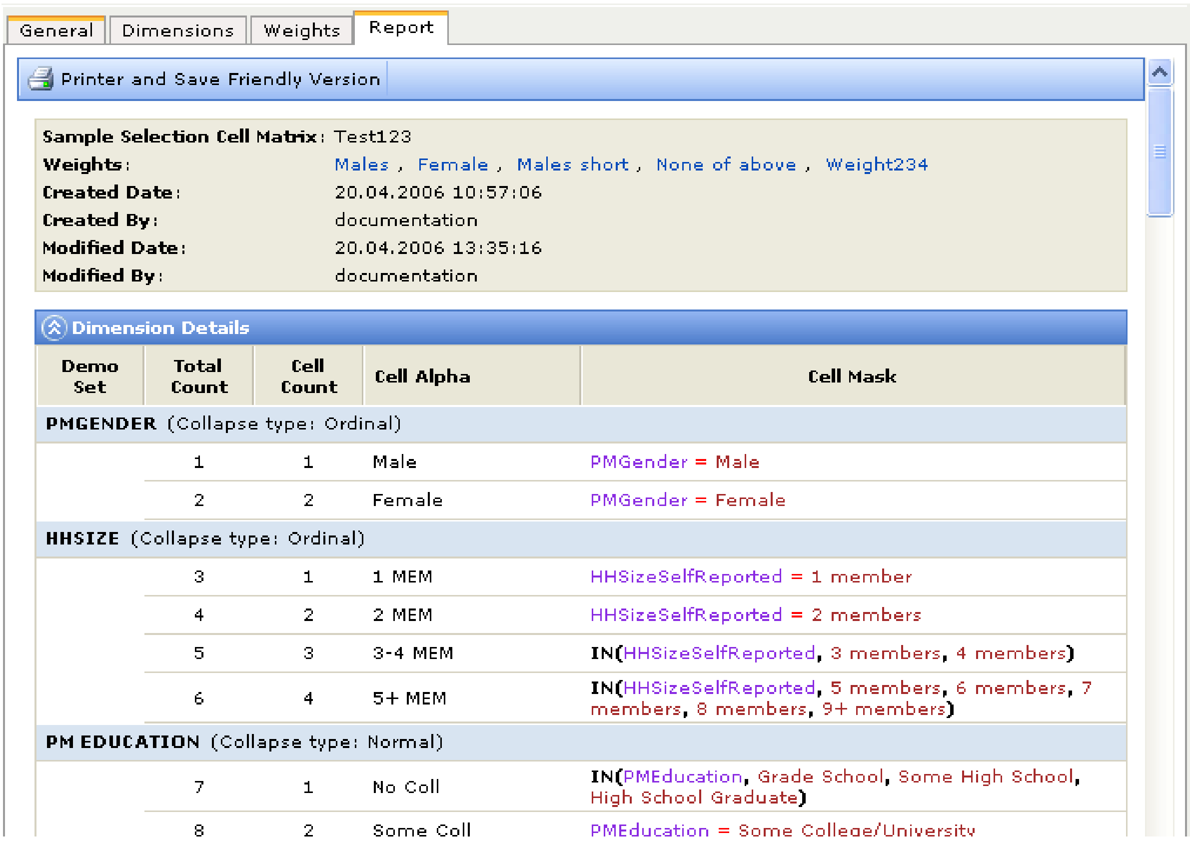


Figure 173 Example of the Report tab

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.

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 Create a Duplicate of 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 174 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 175 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.

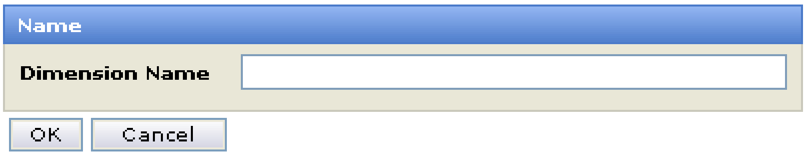


Figure 176 The Dimension name dialog

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.

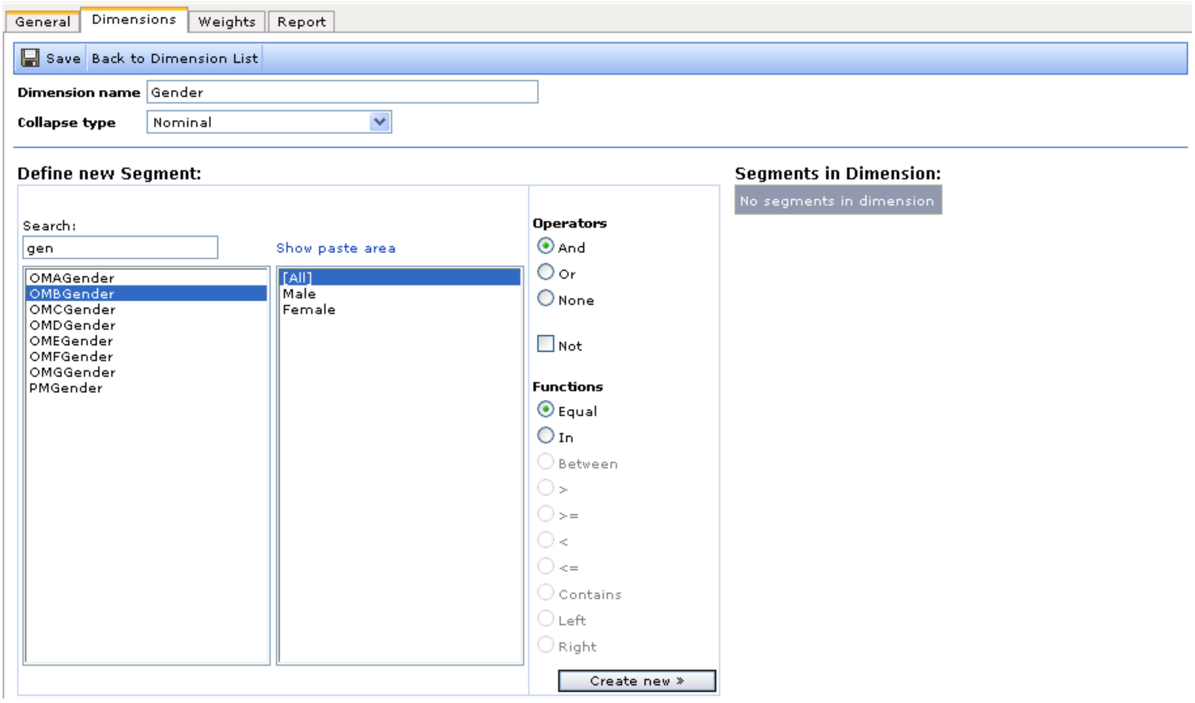


Figure 177 Example of the Edit Dimension window

4. In the variable list (the left column), using the Search function as necessary, find and select the variable you wish to add to the dimension.

   The possible values for the selected variable are presented in the second column. These change as appropriate to reflect the selected variable. You can add as many variables to a segment as required.

5. In the second column, select the required values for the variable.

6. In the third column select the required operator and function.

Note: The operator for the first variable selected must be None.

7. Click **Create New**.

   The segments are added to the dimension and are listed in the Segments in Dimension column.

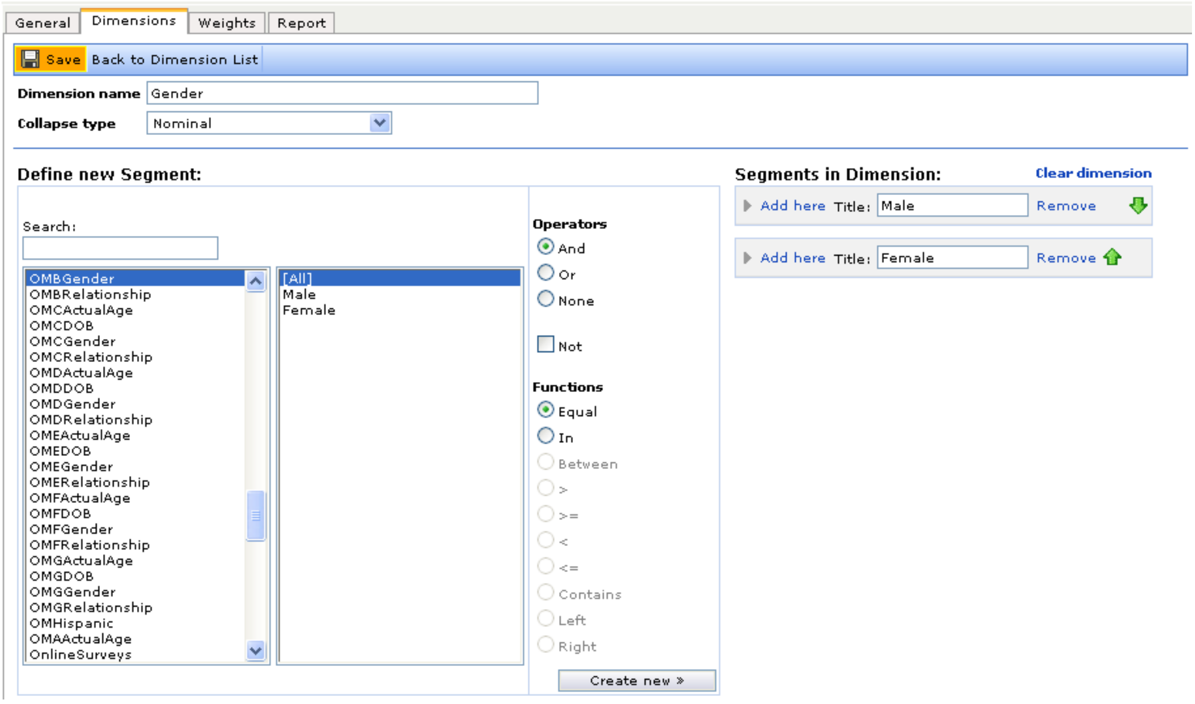


Figure 178 Example of segments in a dimension

8. Save the changes.

7.2.5.4. How to Create a Weight Set

1. In the **Sample Management > Current Matrix Weights** tab, click the **New Weight** button located towards the right side of the tab toolbar.

   The Weight Name dialog opens.

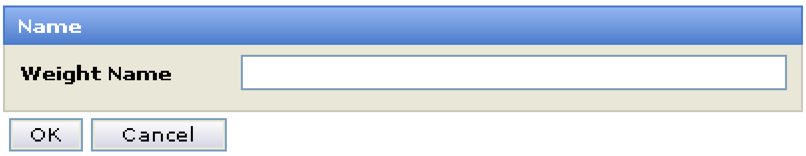


Figure 179 The Weight Name dialog

2. Type a name for the new weight into the data field and click **OK**.

   The Details page for the new weight opens.

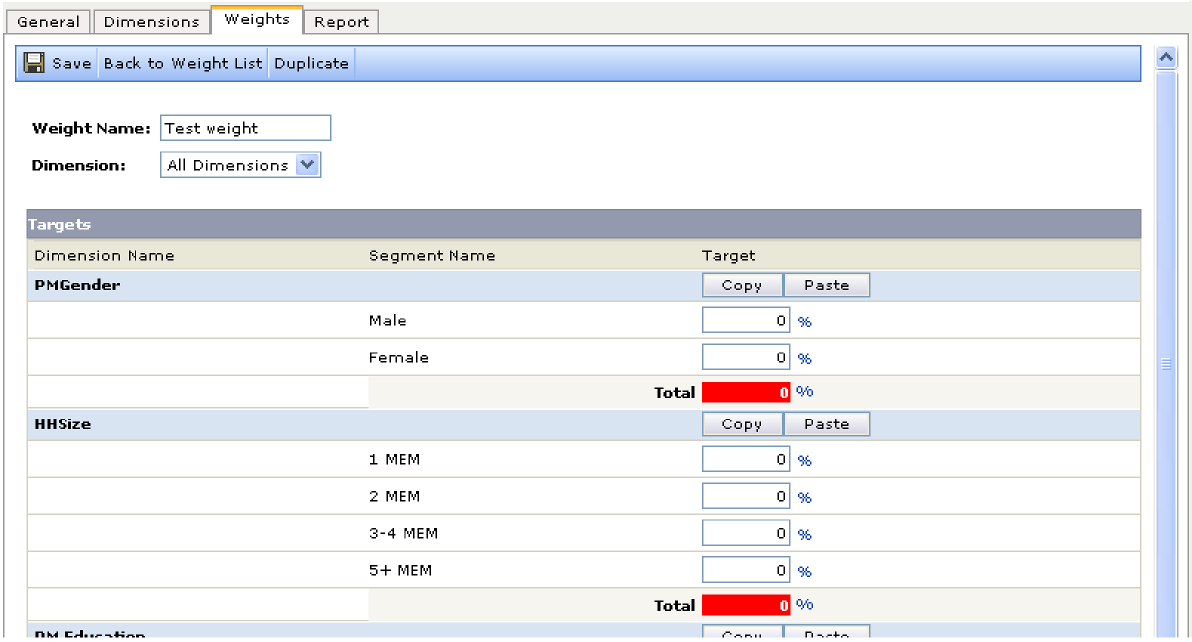


Figure 180 Example of the Details page for a new weight

The target column fields are blank and must be filled in. Note that the Total fields (currently red) for each set of rows must sum to 100%. When this is correct, the field will turn green.

3. Type or copy the appropriate values into the Target fields.
4. Click the down-arrow beside the Dimension field to open a drop down list of the options available, and select the required dimension from the list.

   Each Dimension row has a **Copy** and a **Paste** button. Click **Copy** to copy the target weights for the dimension to the clipboard. Click **Paste** for a different dimension to paste the target weights into that Dimension's weight fields.
5. When all the target weight fields are correctly filled in, click **Save** to save the details.

The weight is saved and added to the Weights list. In the event some target weights are not filled in correctly, an error message will be displayed.

7.2.5.5. How to Delete a Weight Set

To delete unnecessary weight sets:

1. Go to the **Sample Management > Current Matrix > Weights** tab, Weights list.
2. Find the weight set you wish to delete, and click in the corresponding box to select it.
3. Click **Delete Weight**.

   A confirmation message box opens.
4. Click **OK** to delete the weight, or **Cancel** to close the message box without deleting the weight.

7.2.5.6. How to Export a Matrix

You may wish to export a matrix from the current server so it can be used on a different server. A matrix is exported on an email as an **.xml** file. To export a matrix:

1. Click the **Export** button in the General tab's toolbar.

   The Matrix Export dialog opens.

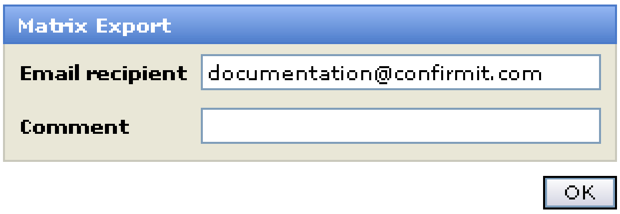


Figure 181 The Matrix Export dialog

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 140 for more information).

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 137 for more information).

Use the filters to find the job you are interested in and click on the blue link to select it. You will be taken automatically to the Current Job window.

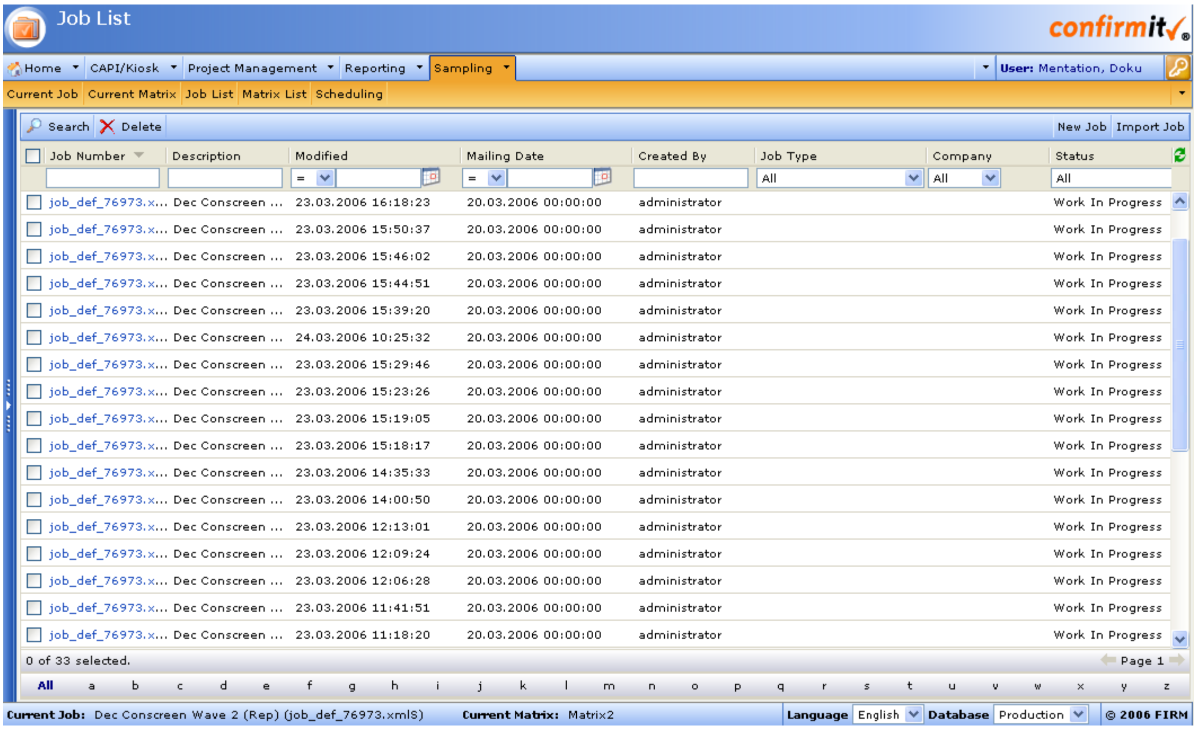


Figure 182 Example of the Job List window

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.

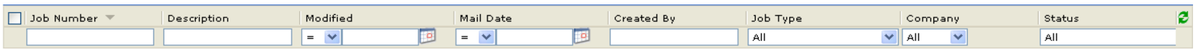


Figure 183 The Job List filter bar

- **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.
- **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.
- **Modified** – enables you to search for jobs 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 jobs that were modified after the selected date.
- **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.
- **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**.
- **Job Type** – allows you to search for jobs according to their type. Click the drop-down arrow beside the field to open a list of the registered job types, select the desired type and click **Search**.
- **Company** – allows you to search for jobs according to the company under which it is registered. Click the drop-down arrow beside the field to open a list of the registered companies, select the one required 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**.
- **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.

7.3.2. The Job List Toolbar

- **Search** – commence a search based on the selected filter criteria.
- **Delete** – delete the selected job(s).
- **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 136 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.

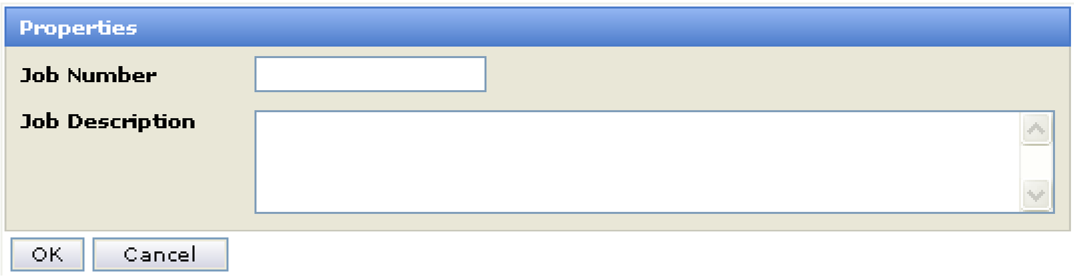


Figure 184 The New Job Properties dialog box

2. Type in a unique job number.
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 80 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 185 The Job Import dialog box

2. Click **Browse** to open a standard Windows browse dialog box, and find the file you wish to import.
3. Type a unique job number into the Job Number field.
4. Click **OK**.

   The file is imported and added to the Job List. You can now select it in the Job List and go to Current Job to edit it.

7.3.3.3. How to Delete a Job

Jobs that are no longer needed can be deleted from the system. Note that once a job has been deleted it cannot be undeleted, you will need to rebuild it. You can delete any number of jobs simultaneously.

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

   The Job List window opens.

2. Find the job or jobs you wish to delete.
3. Click in the check boxes for those jobs to select them.
4. Click **Delete**.

   The selected files are permanently deleted.

7.4. Active Job List

This window lists all the sampling jobs that are currently “in production”. Once a job is complete, the sample is linked to the survey and the panelists are invited to respond, then the job is moved to this list from the Job List.

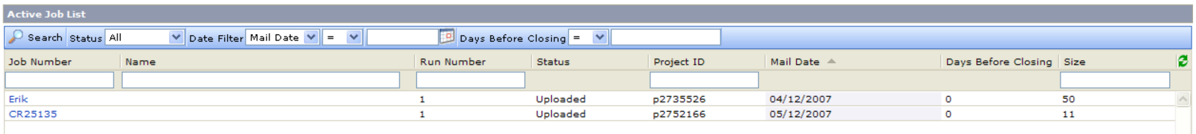


Figure 186 Example of the Active Job List

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. Confirmit 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 137 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.
- **Mail Date** – presents the date on which the survey was mailed to the respondents in this sample.
- **Days Before Closing** – the number of days that this survey and sample will remain active before closing.
- **Size –** the number of panelists specified for this sampling job.

7.4.3. The Active Job Details Page

Click on a blue **Job Number** link in the Active Job List to open the Active Job Details page for that job, as shown in the example below.

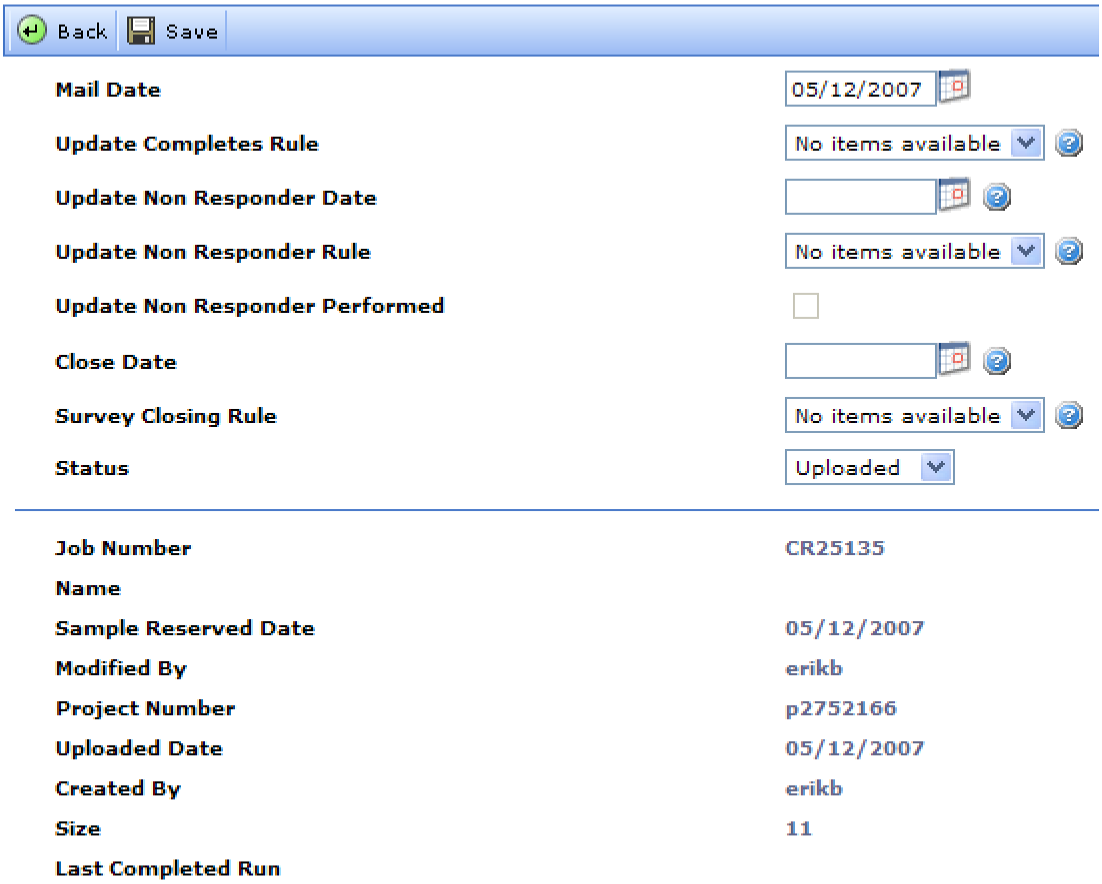


Figure 187 Example of an Active Job Details page

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.

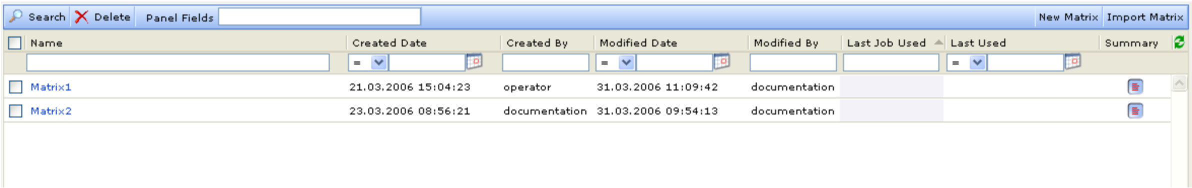


Figure 188 Example of the Matrix List

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**– shows a summary of the matrix dimensions.

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.

7.5.1. Procedures in the Matrix List Window

7.5.1.1. How to Create a New Matrix

1. Click the **New Matrix** button located towards the upper right corner of the window.

   The New Matrix dialog box opens.

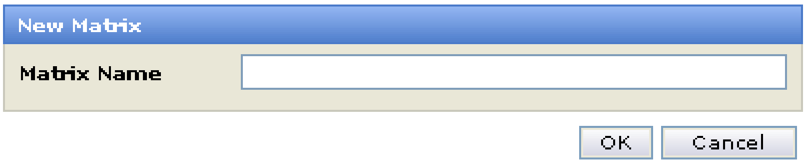


Figure 189 The New Matrix dialog

2. Type a name for the new matrix into the Matrix Name field.
3. Click **OK**.

   The **Sample Management> Current Matrix** window opens at the General tab.

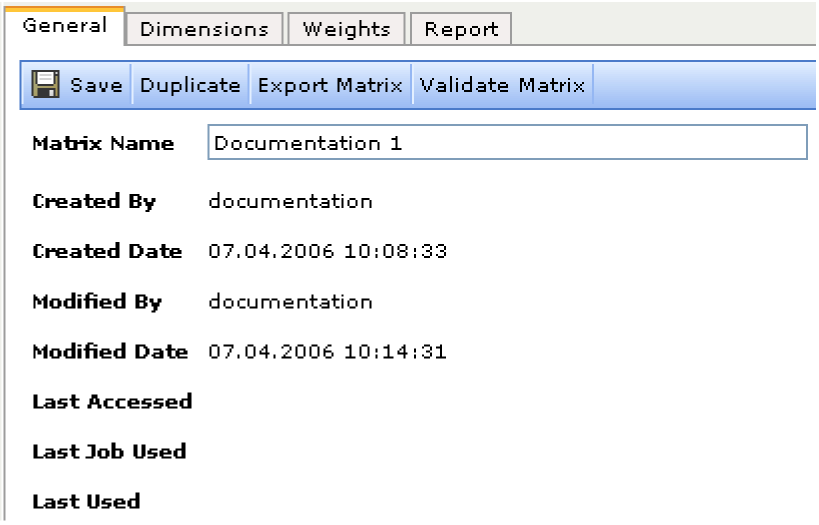


Figure 190 Creating a new matrix

You now need to define the dimensions and segments for the matrix (go to Current Matrix on page 125 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 133 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.

Figure 191 The Matrix Import dialog box

4. Click **Browse** to open a standard Windows file selection dialog, browse to the .xml file and select it, then click **Open**.

The .xml file name is added to the File to Upload field.

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

   This name will be displayed in the Matrix List window.

6. Click **OK**.

   The matrix file is uploaded and added to the matrix list. You can now edit the matrix as required and add it to a job (go to Current Matrix on page 125 for more information).

7.6. Scheduling

This window lists the jobs that are awaiting execution and those that have been run. To open the Scheduling window, go to the **Sample Management > Scheduling** menu command.

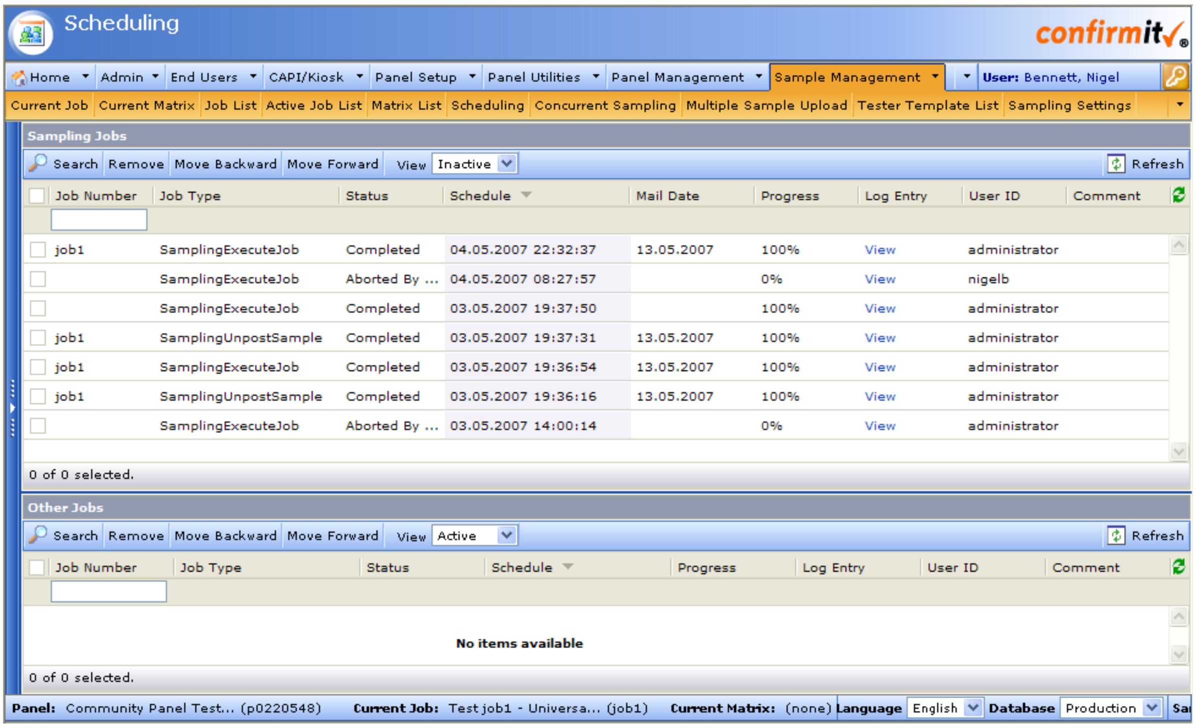


Figure 192 Example of the Scheduling window

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.
- **Remove** – click to delete a selected job from the list.
- **Move Backward –** moves the selected job to 1 minute after the next job in the list.
- **Move Forward –** moves the selected job to 1 minute before the previous job in the list.
- **View** – select Active or Inactive.
- **Refresh** – click to update the lists.

7.6.1. The Sampling Jobs List

The **Sampling Jobs > Active** list contains those jobs that are waiting to be run.

1. Click the link in the Mail Date column to open the Task Scheduling window for the job.

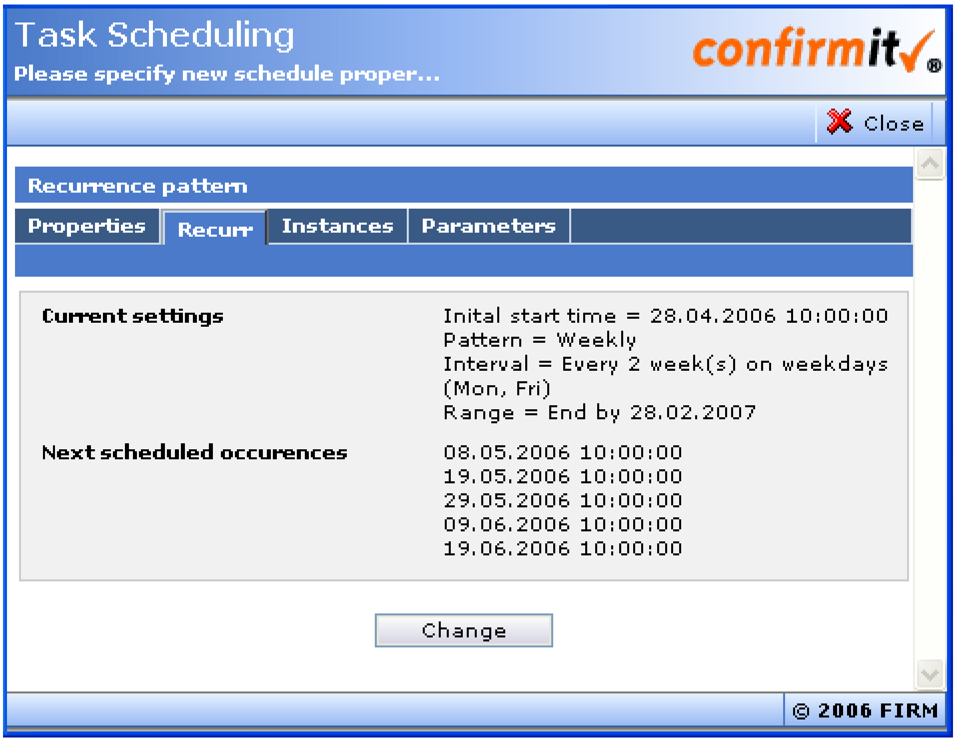


Figure 193 Example of the Task Scheduling window

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.

Click **Change** to open the dialog for access to the recurrence settings(go to The Task Definition Properties Dialog on page 116 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.

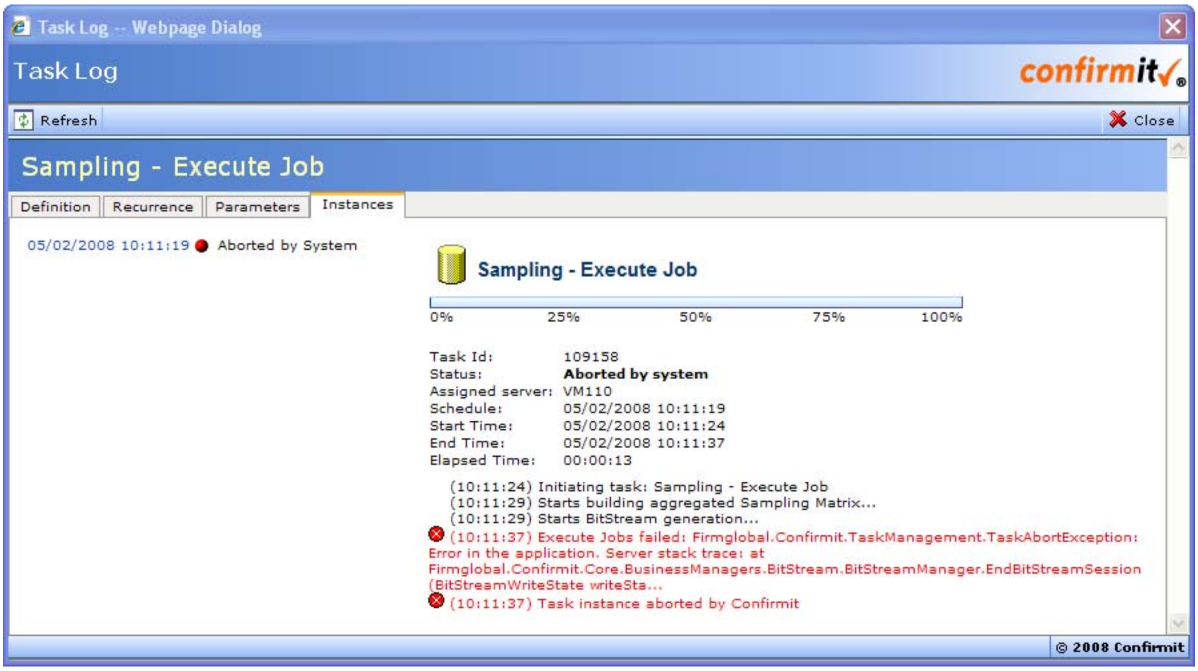


Figure 194 Example of the Task Log for an aborted job

- 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 107 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. 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 as shown in the example below.

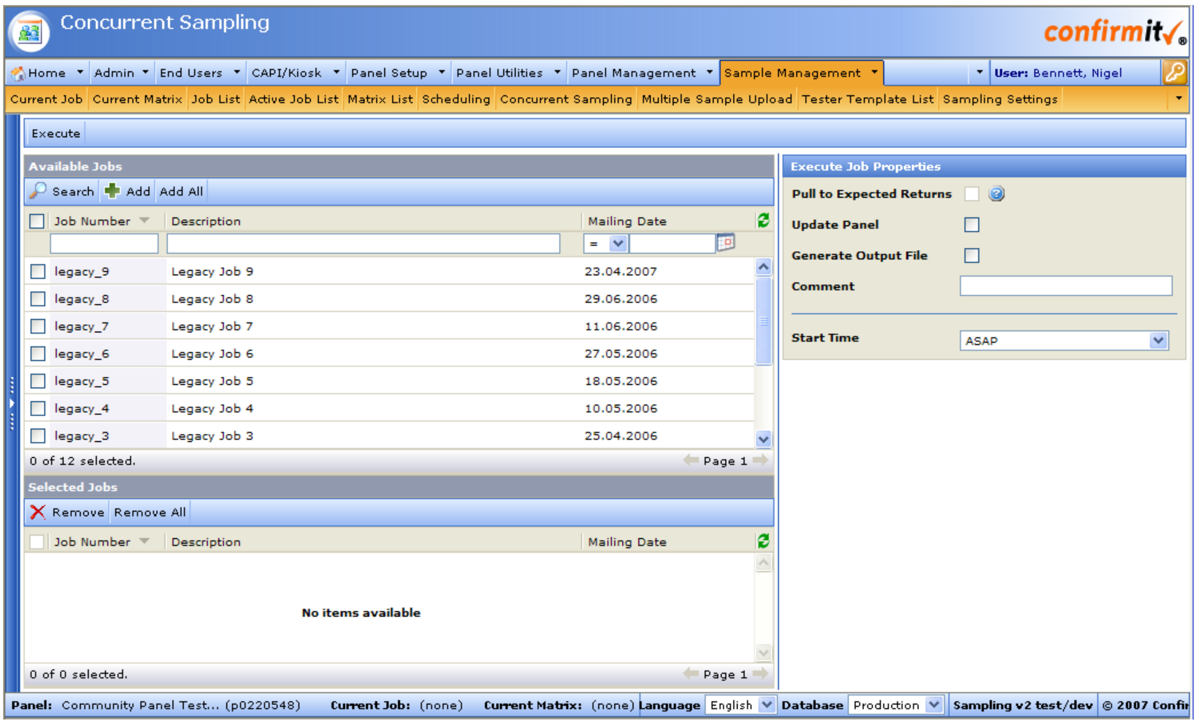


Figure 195 Example of the Concurrent Sampling window

The window contains three main areas:

- **Available Jobs –** lists the sampling jobs that are currently available to be run.

  Click in the checkbox beside a job to select the job, then click **Add** in the toolbar above the list to move the job to the Selected Jobs list below. Selected jobs will be grayed out in the Available Jobs list.

- **Selected Jobs –** the jobs that have been selected to be run in the concurrent sampling task.

  To remove a job from the Selected Jobs list, click in the checkbox beside the unwanted job and click **Remove**. The job is returned to the Available Jobs list.

- **Execute Job Properties –** this area contains properties that you can set for the job that is to be executed.

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. 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.

3. Click **Add** to move the selected jobs to the Selected Jobs list.
4. In the Execute Job Properties column, select and/or set the required options.
5. Click **Execute**.
6. 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 149 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 107 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.

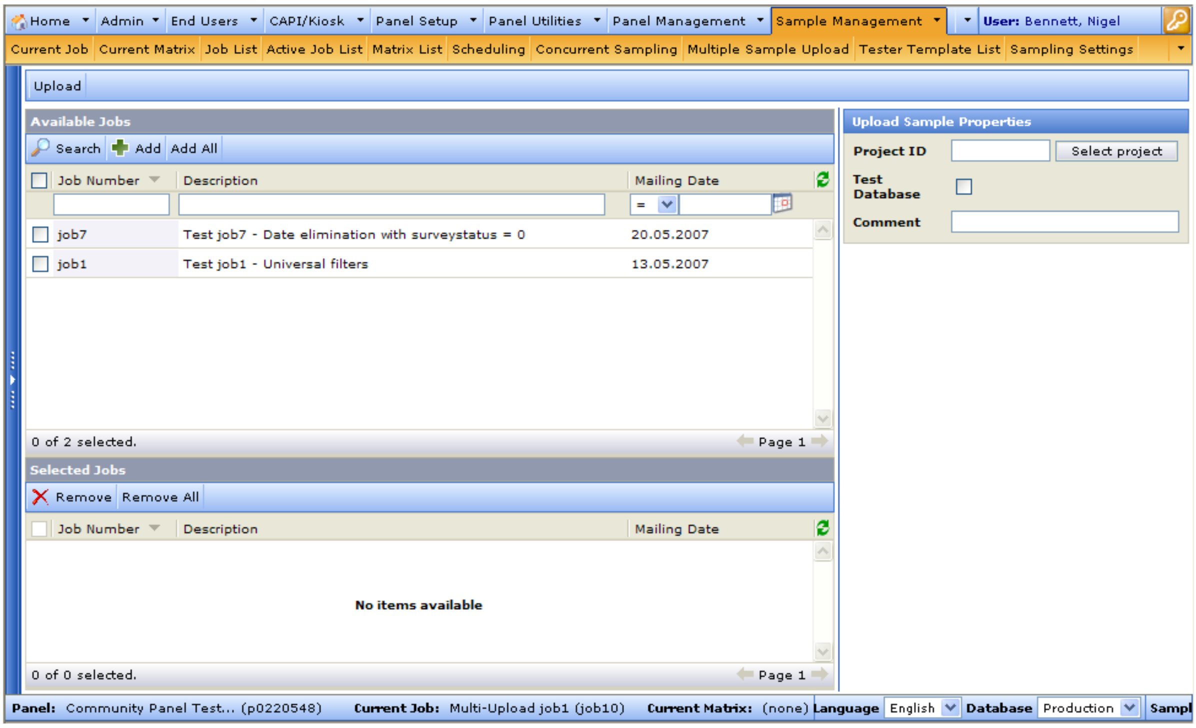


Figure 196 Example of the Multiple Sample Upload window

   Here you must specify the project the jobs are to be uploaded to.

2. In the Upload Sample Properties column, click **Select Project**.

   The Available Survey Project window opens, listing the projects currently available.

3. Select the project you wish to upload the jobs to, and click **OK**.

   The Available Survey Project window closes and the project number is added to the Project ID field.

4. In the Available Jobs list, select the jobs you wish to upload and click **Add**.

   The selected jobs are grayed out in the upper list and are moved to the Selected Jobs list below.

5. Click **Upload** towards the left end of the Multiple Sample Upload window toolbar.

   The task window appears as in the example below. Click the Task ID links to see the details pages for the tasks.

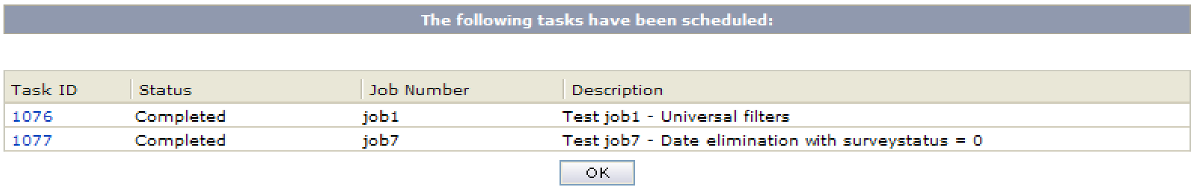


Figure 197 Example of the task list

6. On completion, click **OK**.

   The task list closes and you are returned to the Multiple Sample Upload window.

7.9. Tester Template List

Go to the **Sample management > Tester Template List** menu command. This window enables you to add rows to the respondent database that you can then populate with "dummy" respondent information such that you can test the survey and the system setup before you send it out to the actual respondents.

A Template in this instance is a set of dummy respondent information that you can create and store such that it is available to be added to the respondent database when required.

You can set up any number of such templates for a panel, and add different respondent information to each such that you can check different parts of the survey logic.

In the event the list is extensive, 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.

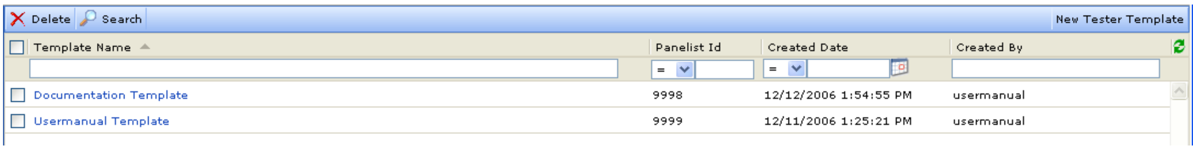


Figure 198 Example of the Tester Templates window

7.9.1. How to Create a New Tester Template

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

   The New tester Template dialog box opens.

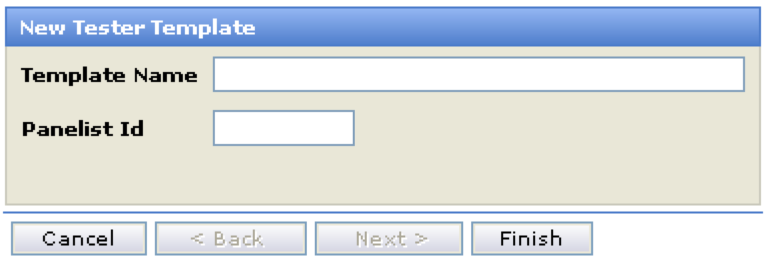


Figure 199 The New Tester Template dialog box

2. Type in a name and a panelist ID for the template
3. Click **Finish**.

   The template is created and the Tester Template page opens.

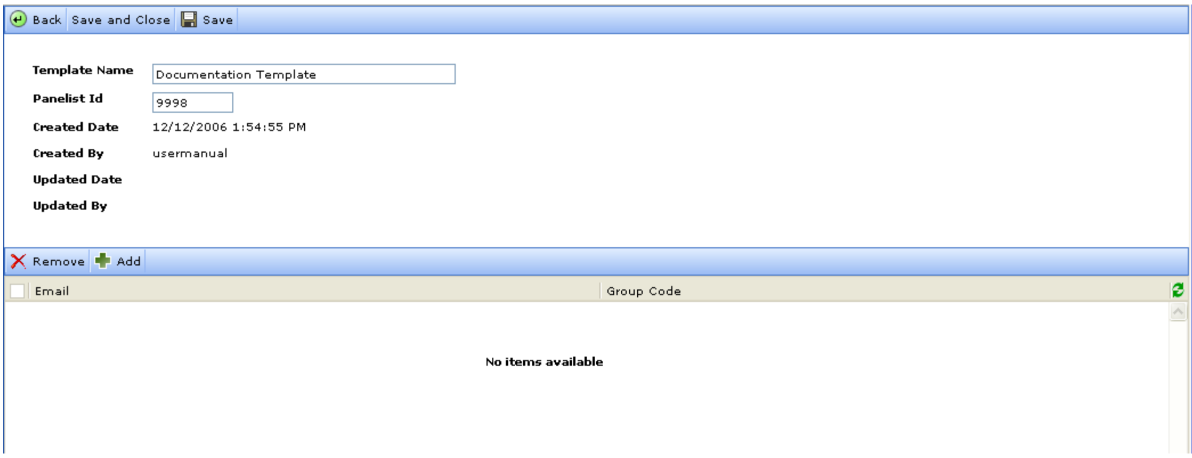


Figure 200 Creating a new tester template

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 valid email address into the Email field, and type a group code into the other field.

   This Group Code corresponds to the codes specified in the sub-sample.

6. Repeat steps 4 and 5 until you have the required number of “Test respondents” in the template.

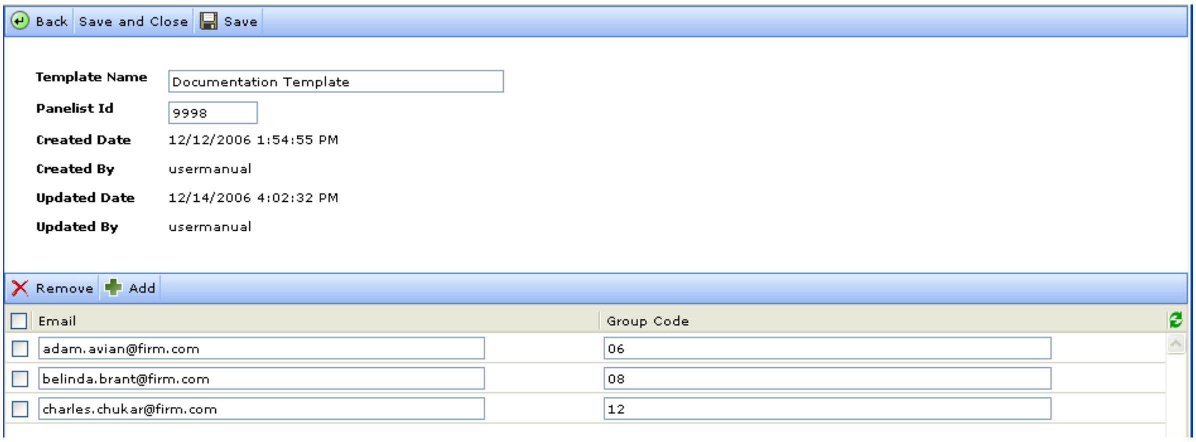


Figure 201 Example of a tester template

7. Click **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 Respondents to the Database on page 115 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

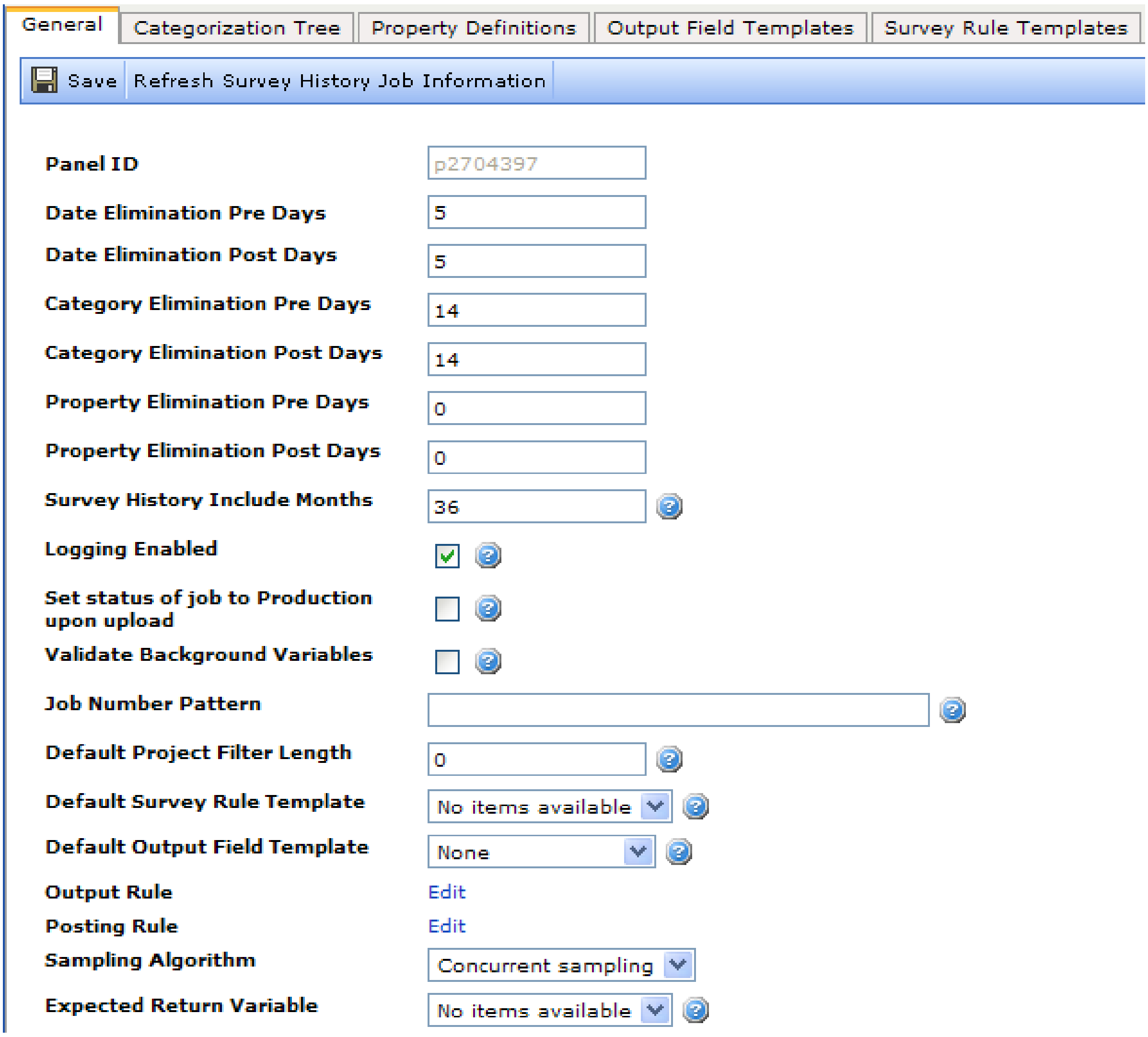


Figure 202 The Sampling Settings page General tab

Use this page to set the default properties for the panel. 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 Elimination 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 Elimination Function on page 86 for more information).
- **Date Elimination 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 Elimination Function on page 86 for more information).
- **Category Elimination 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 Elimination Function on page 85 for more information).
- **Category Elimination 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 Elimination Function on page 85 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 153 for more information).
- **Default Output Field Template –** the Output Field Template to be used if no other Output Field Template is specified based on custom properties (go to The Output Field Templates Tab on page 152 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 57 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 57 for more information).
- **Sampling Algorithm** - allows you to specify the sampling algorithm to be used for single job execution. Select an Expected Return Value (see below) and execute (go to The Execution Tab on page 102 for more information).
- **Expected Return Variable –** select the variable that contains the panelists' probability of answering a survey. 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. The variable cannot be null 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 145 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 79 for more information).

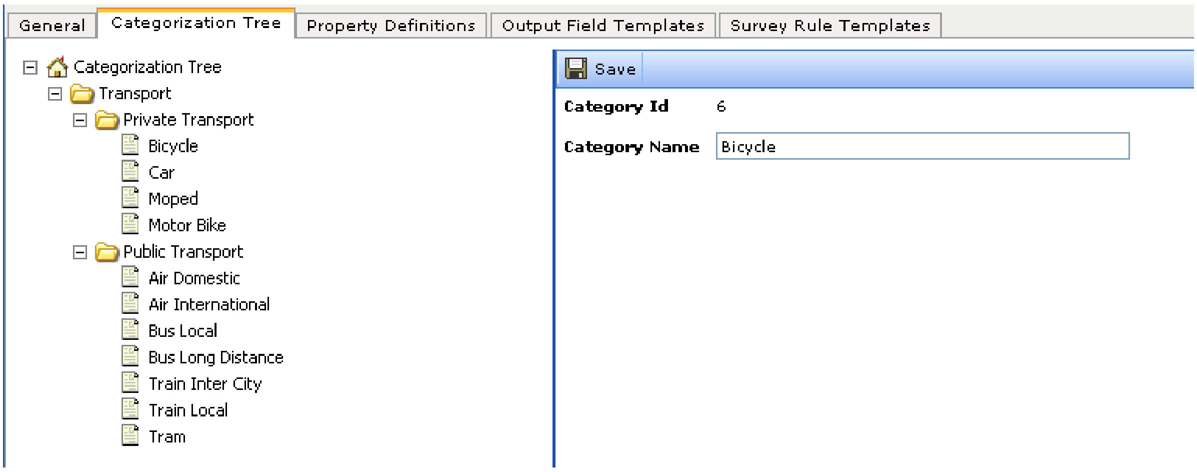


Figure 203 Example of the Categorization Tree tab

To add a categorization or group, in the tree, right-click on the item after which you wish to create the net item, and select **Add Category** or **Add Categorization Group** from the drop-down menu as appropriate.

These categorizations will then be available to you when creating and/or editing the current job.

7.10.4. The Property Definitions Tab

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

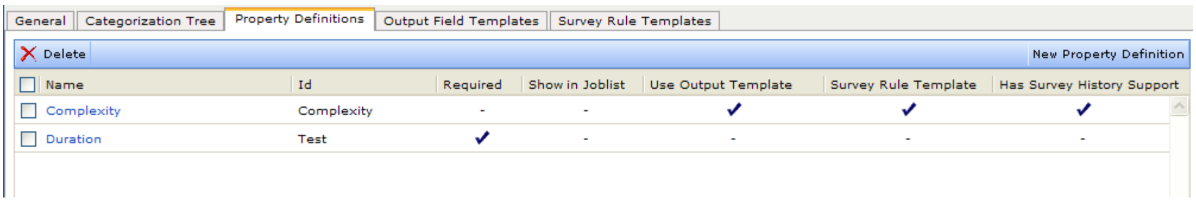


Figure 204 Example of the Property Definitions list

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.

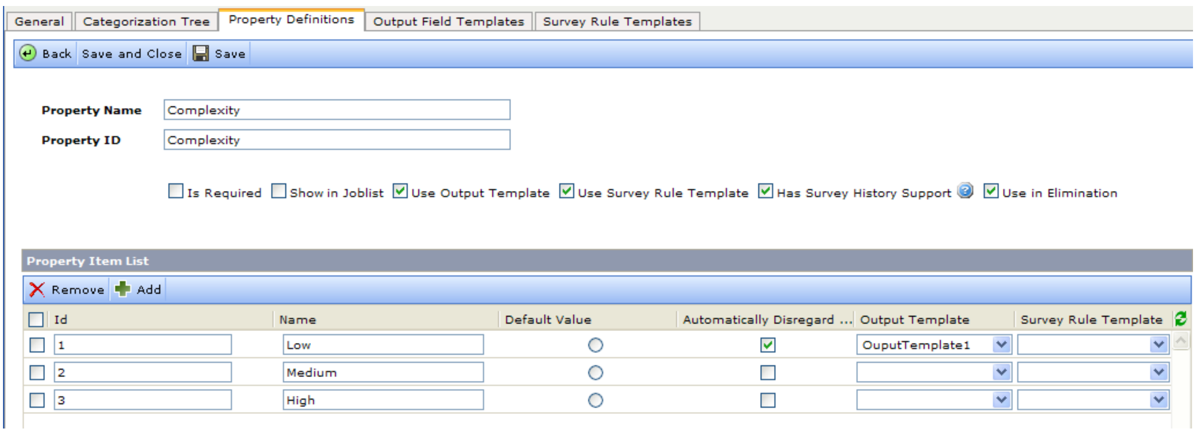


Figure 205 The Property Definitions page

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 Output Template –** in the Property Item List in the lower part of the page, select the Output 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 87 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.

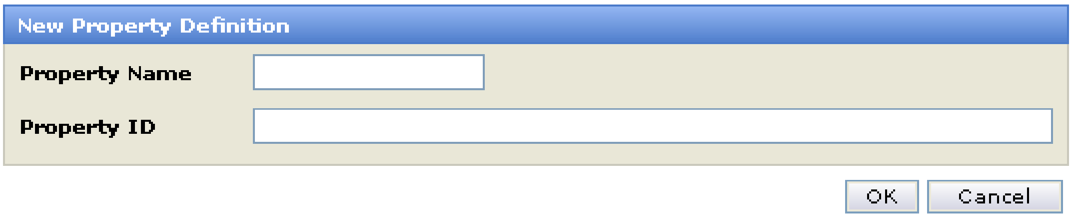


Figure 206 The New Property Definition dialog

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 Output 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.

To specify any columns that are to be included in addition to these default columns specified here, go to the **Current Job > Additional Items** menu command (go to The Additional Items Tab for more information).

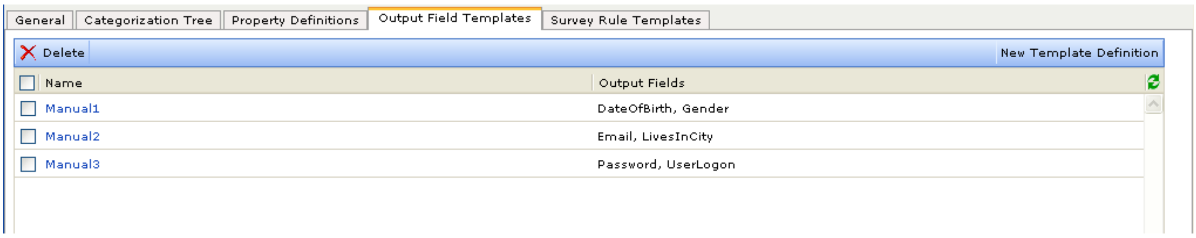


Figure 207 Example of the Output Field Templates tab

Click on the blue **Name** link for a template to open the editing page for that template.

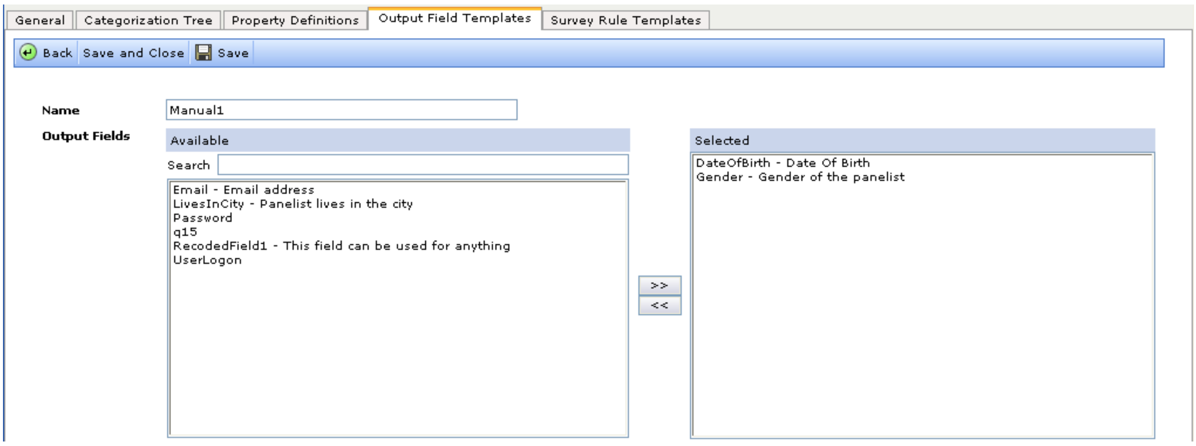


Figure 208 Example of the template editing page

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 Output 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 output 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 output file.

7.10.6. The Survey Rule Templates Tab

Use the properties in this tab to specify how information in a survey is to update the panel, and to specify which rules are to be used in which event. Three events can be controlled by rules:

- When and how the database is updated with respect to panelists who have completed the survey.
- When and how the database is updated with respect to panelists who have not responded to the survey.
- When the survey is to be closed to respondents.

7.10.6.1. How to Create a New Survey Rule Template

1. Click the **New Survey Rule Template** button located towards the right end of the list toolbar.

   The New Survey Rule Template dialog box opens.

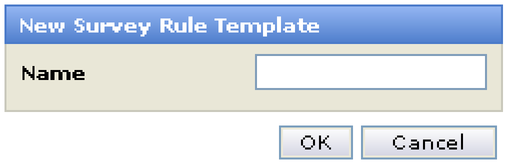


Figure 209 The New Survey Rule Template dialog box

2. Type a name for the new rule into the Name field.
3. Click **OK**.

   The Rules page opens, enabling you to edit the rules for the template.

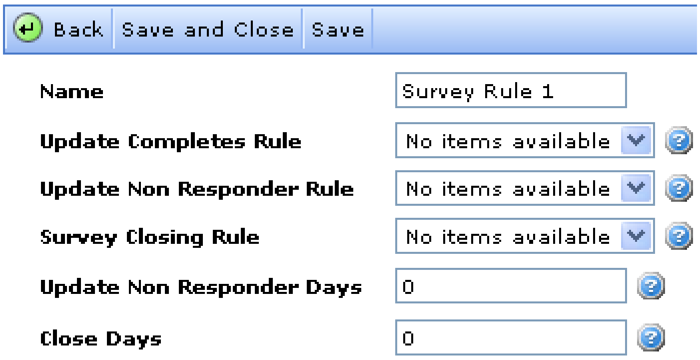


Figure 210 The Edit Rules page

The properties are as follows:

- **Name –** the name of the rule. This can be edited as required.
- **Update Completes Rule –** the rule to run during normal recurring statusing of the panel based on surveys.
- **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 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 Non Responder Days setting below..
- **Survey Closing Rule –** this rule is run when a survey is to be closed (when the survey is completed).
- **Update Non Responder Days –** the number of days after the start of a survey that the Non Responder rule is to be run.
- **Close Days –** the number of days after the survey is made available to a sample to when 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 4 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 73 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. Here you can set up the rule to recur as required (go to How to Set Up and Run a Snapshot Task on page 156 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 107 for more information).

Figure 211 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 155 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.

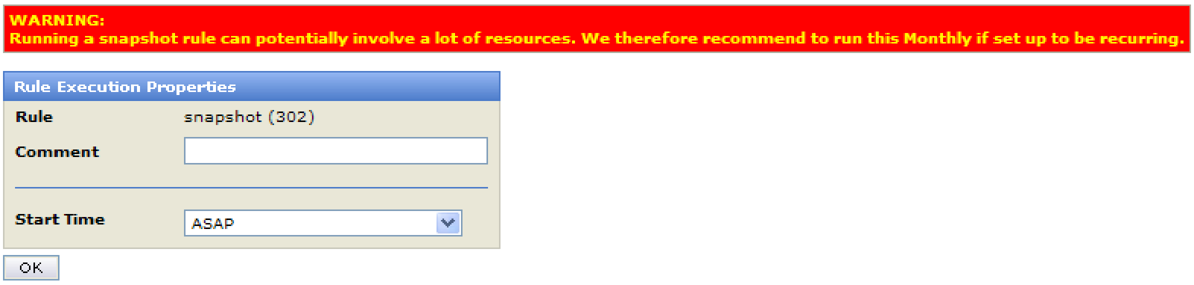


Figure 212 Executing the Snapshot rule

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 as shown below.

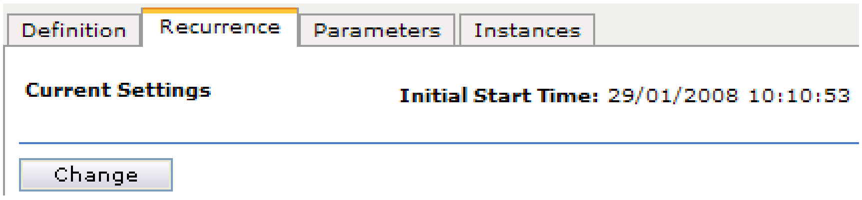


Figure 213 The Rule Executor page Recurrence tab

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

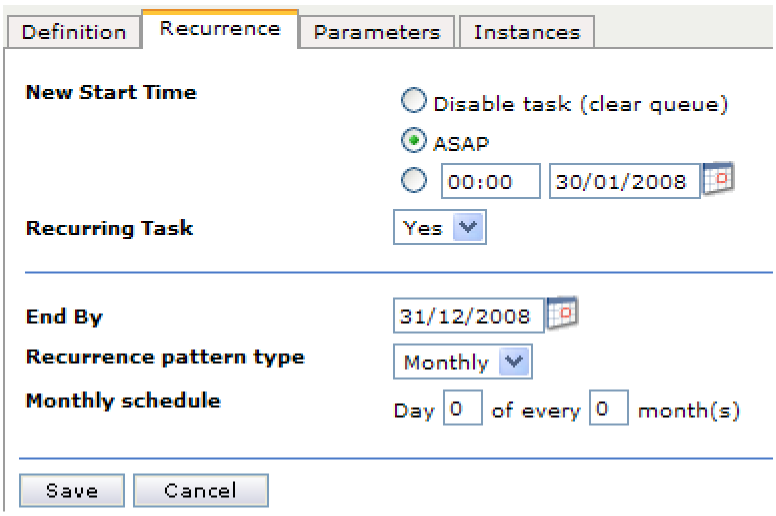


Figure 214 The Recurrence tab in Editing mode

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.

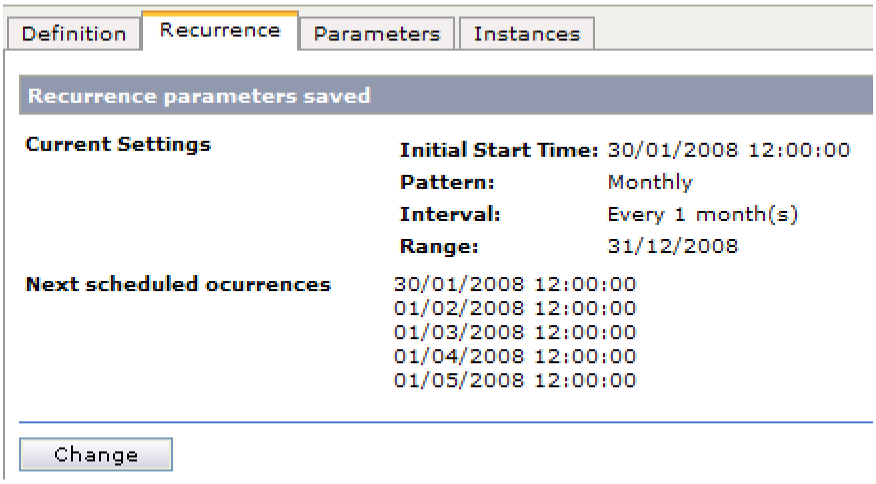


Figure 215 Example of the Recurrence tab with tasks scheduled to run

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 165 for more information), and to produce reports based on the data in those cubes.

Figure 216 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 162 for more information) and default reports (go to Create Default Reports on page 164 for more information).

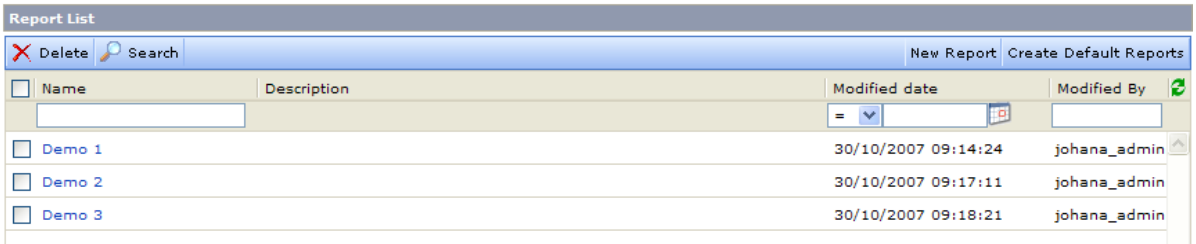


Figure 217 Example of the Report List page

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 162 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 164 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.

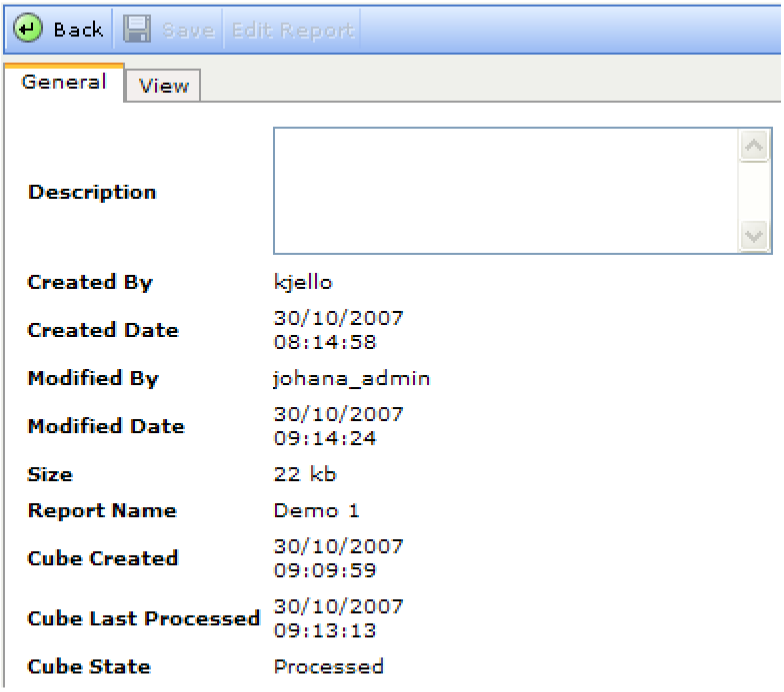


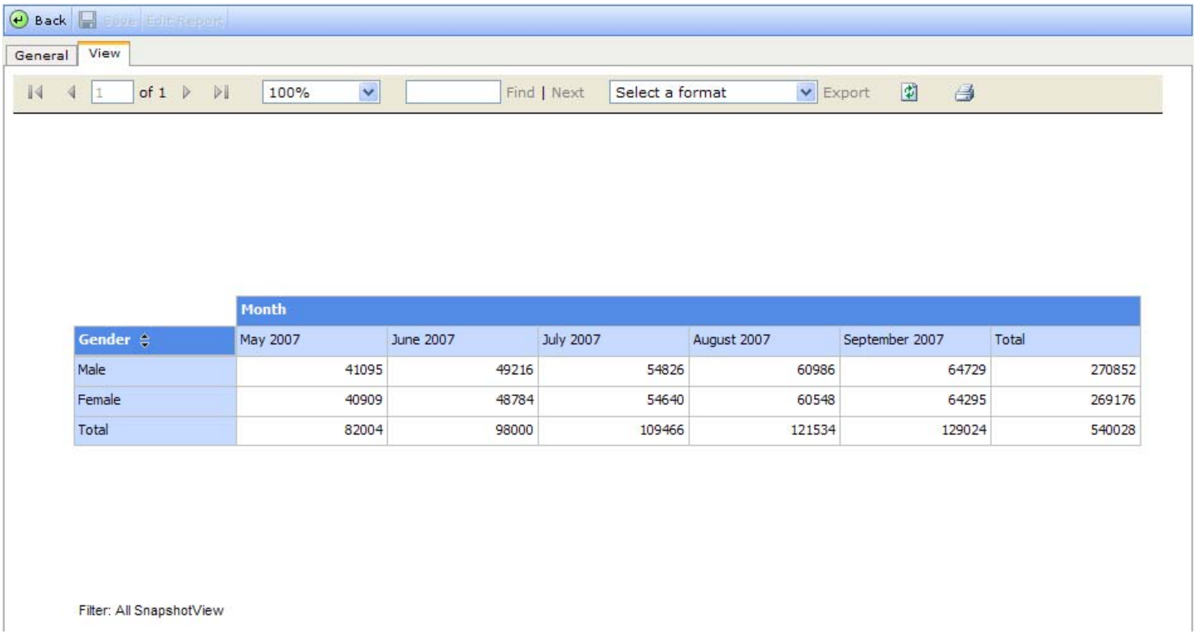
Figure 218 Example of the General tab for a report

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					
Gender	May 2007	June 2007	July 2007	August 2007	September 2007	Total
Male	41095	49216	54826	60986	64729	270852
Female	40909	48784	54640	60548	64295	269176
Total	82004	98000	109466	121534	129024	540028

Figure 219 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, export the report in a specified format, and print out the current report page.

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 as shown below.

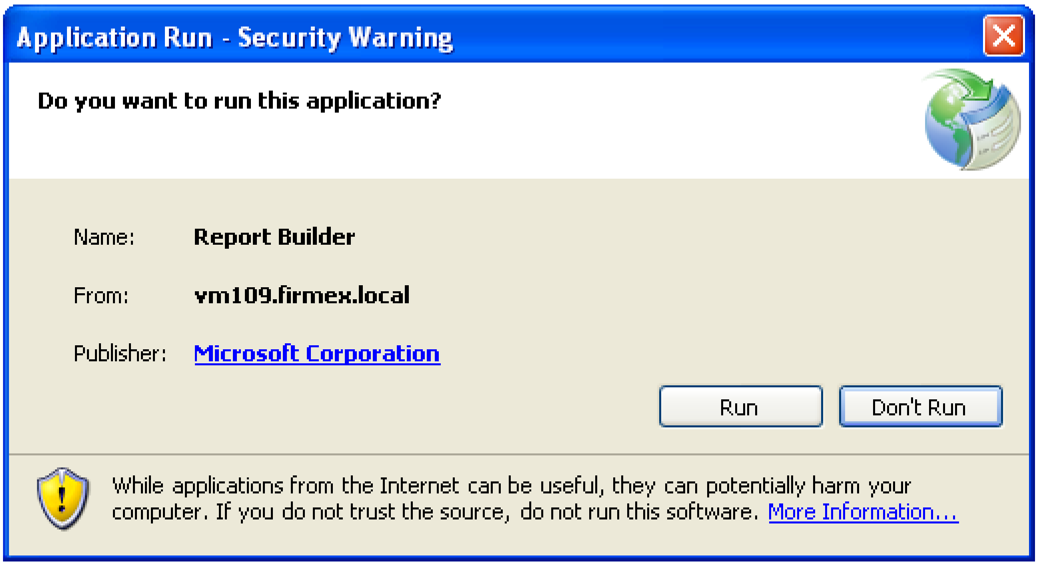


Figure 220 The Security Warning dialog

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.

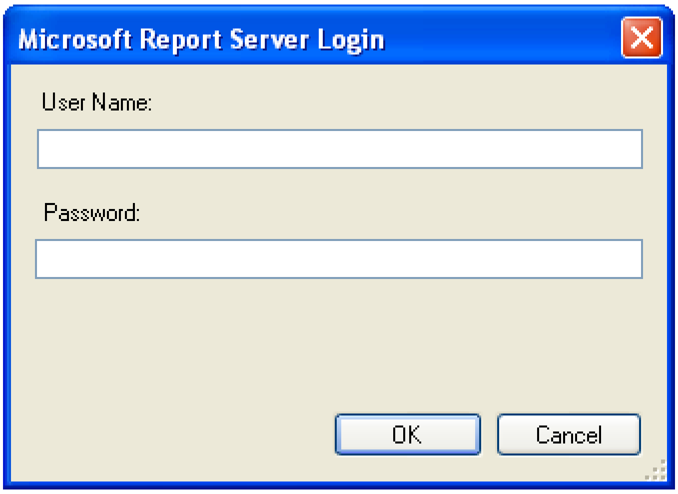


Figure 221 The MS Report Builder login dialog

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 161 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.

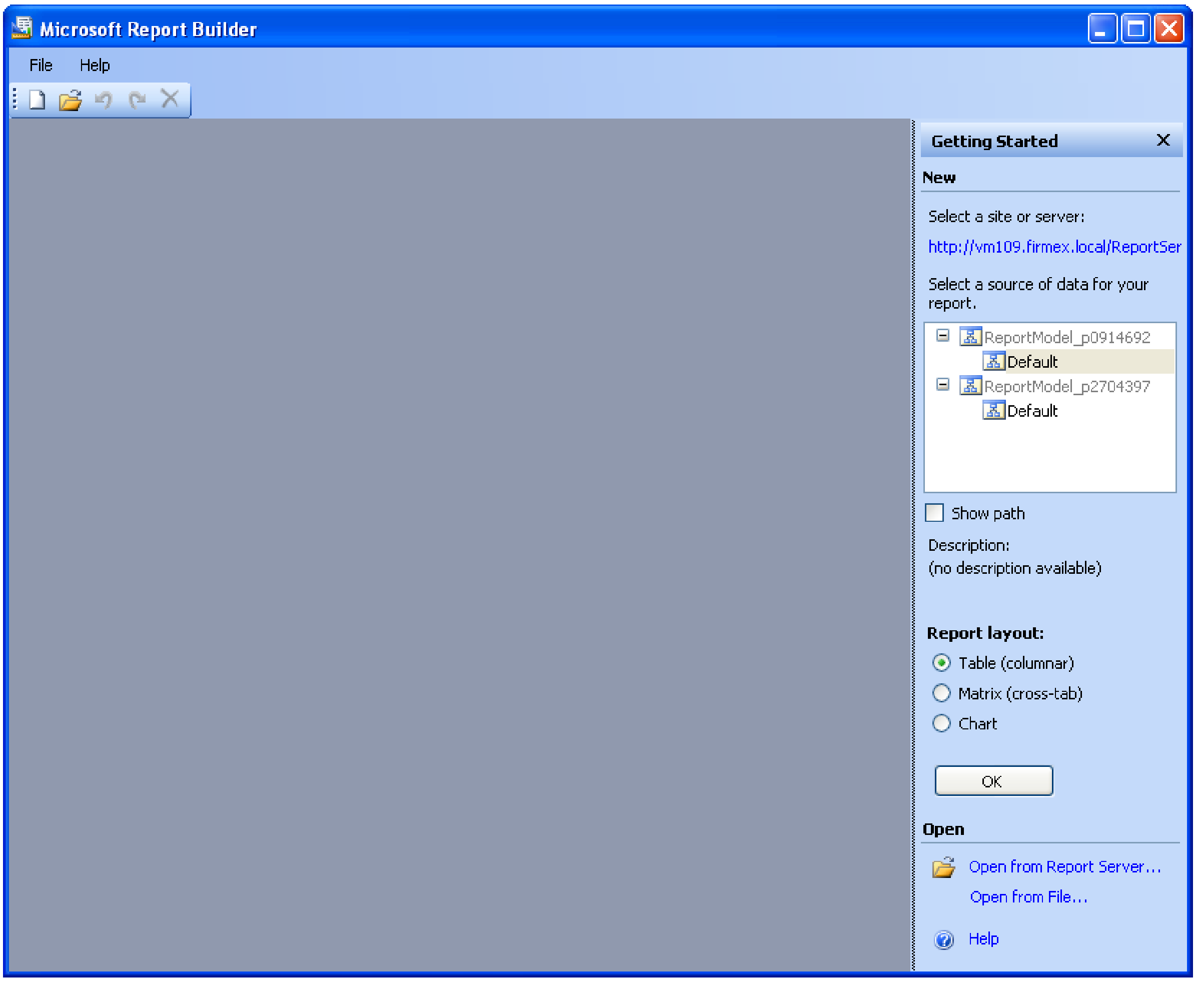


Figure 222 The MS Report Builder application ready for use

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.

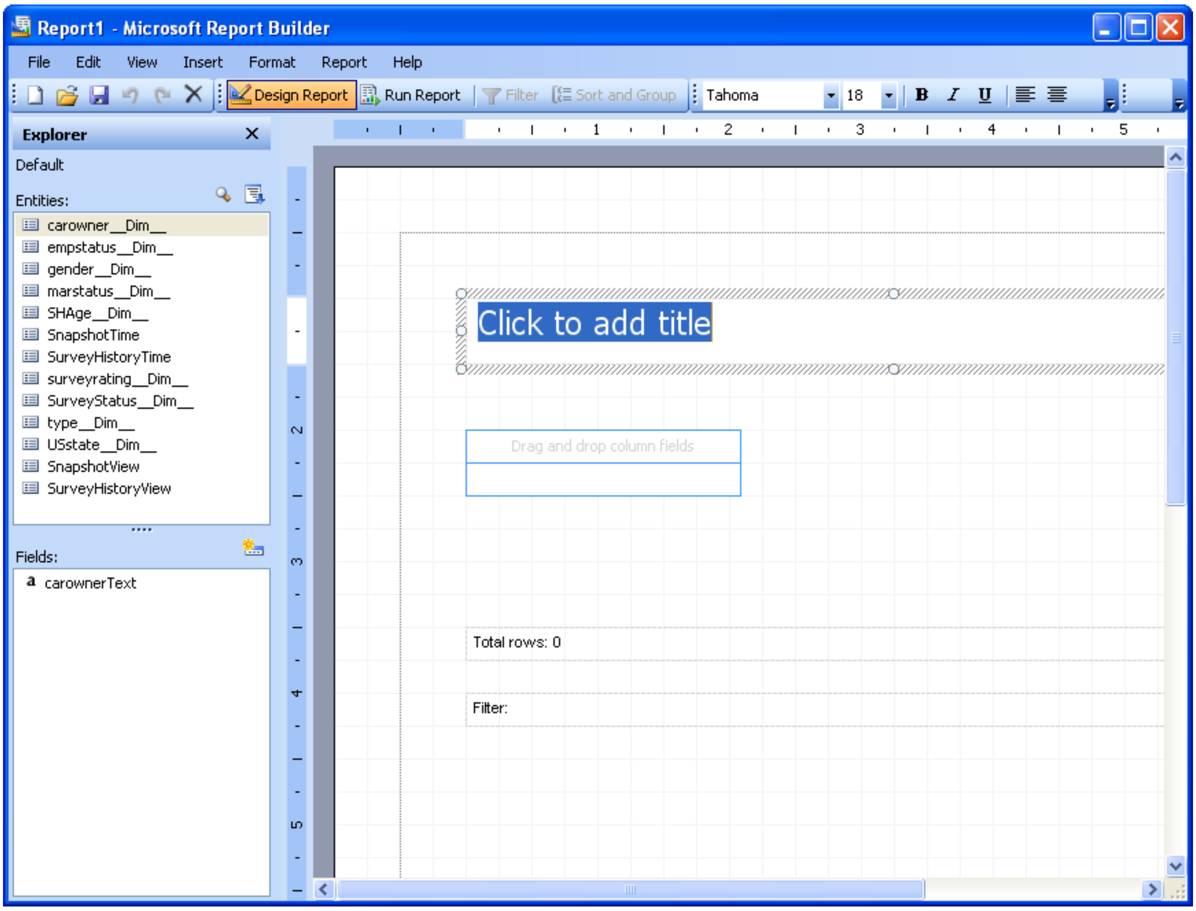


Figure 223 The Report Builder design area

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.

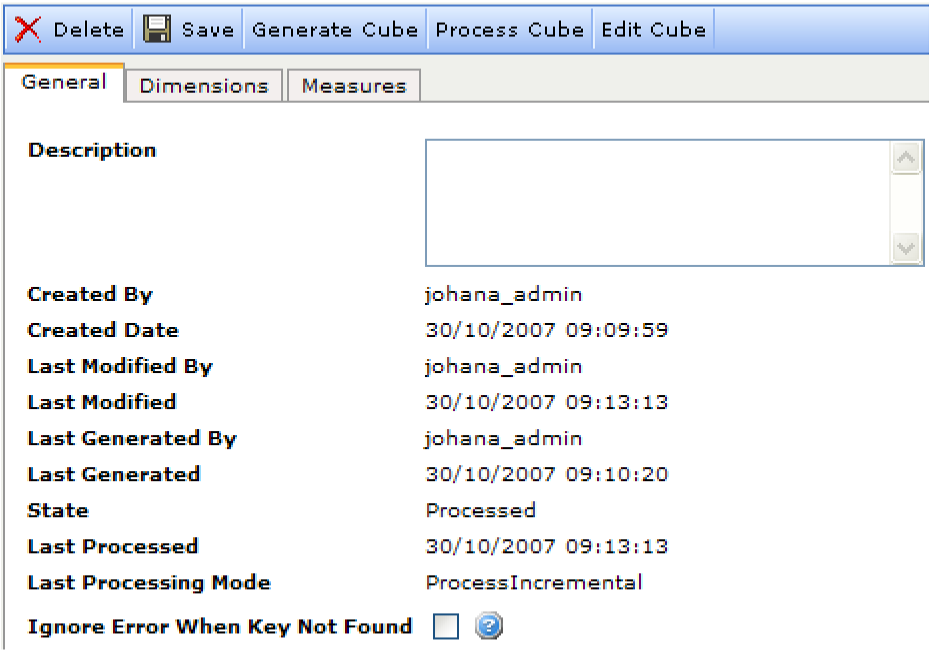


Figure 224 Example of the Cube Details > General tab

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 167 for more information). The information is read-only on this tab, though you can change the selected dimensions by clicking **Edit Cube**.

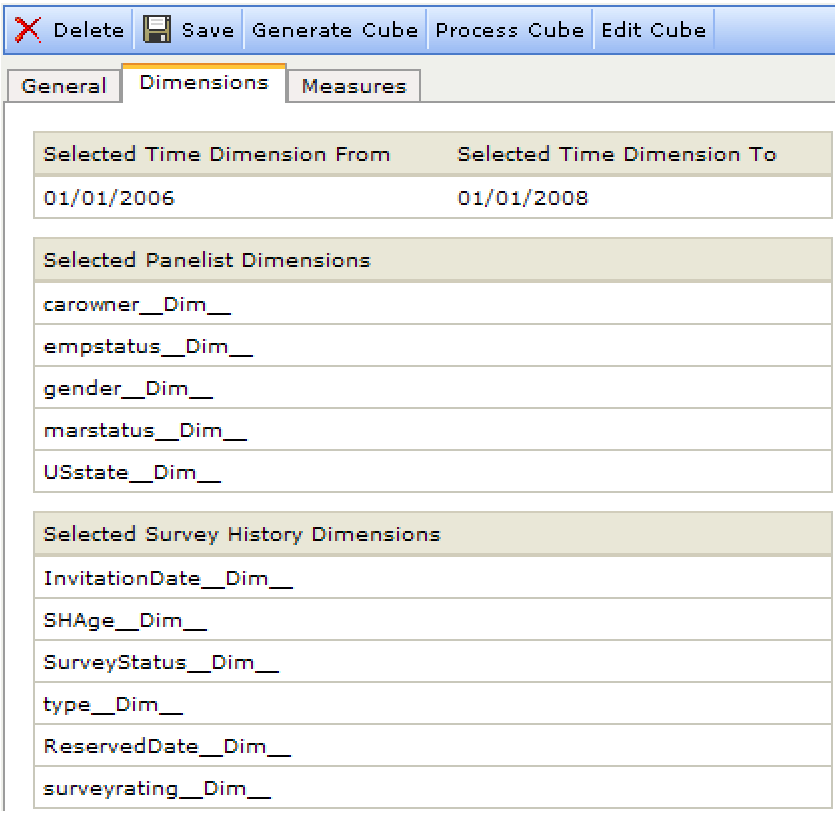


Figure 225 Example of the Cube Details > Dimensions tab

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 167 for more information). The information is read-only on this tab, though you can change the selected dimensions by clicking **Edit Cube**.

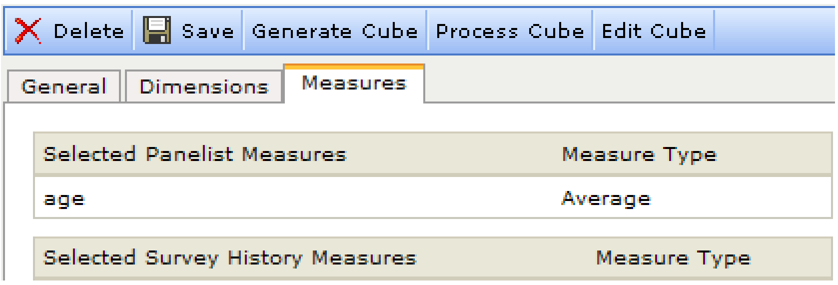


Figure 226 Example of the Cube Details > Measures tab

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 as shown below.

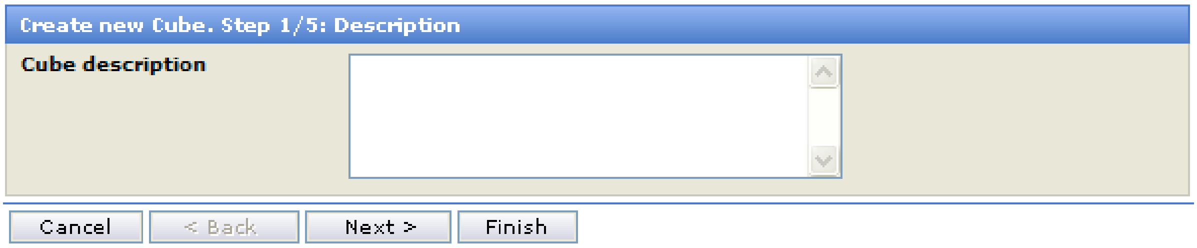


Figure 227 Step 1 when creating a new cube

3. Type into the field a description of the cube for future reference, then click **Next**.

   The Select Dimensions page opens.

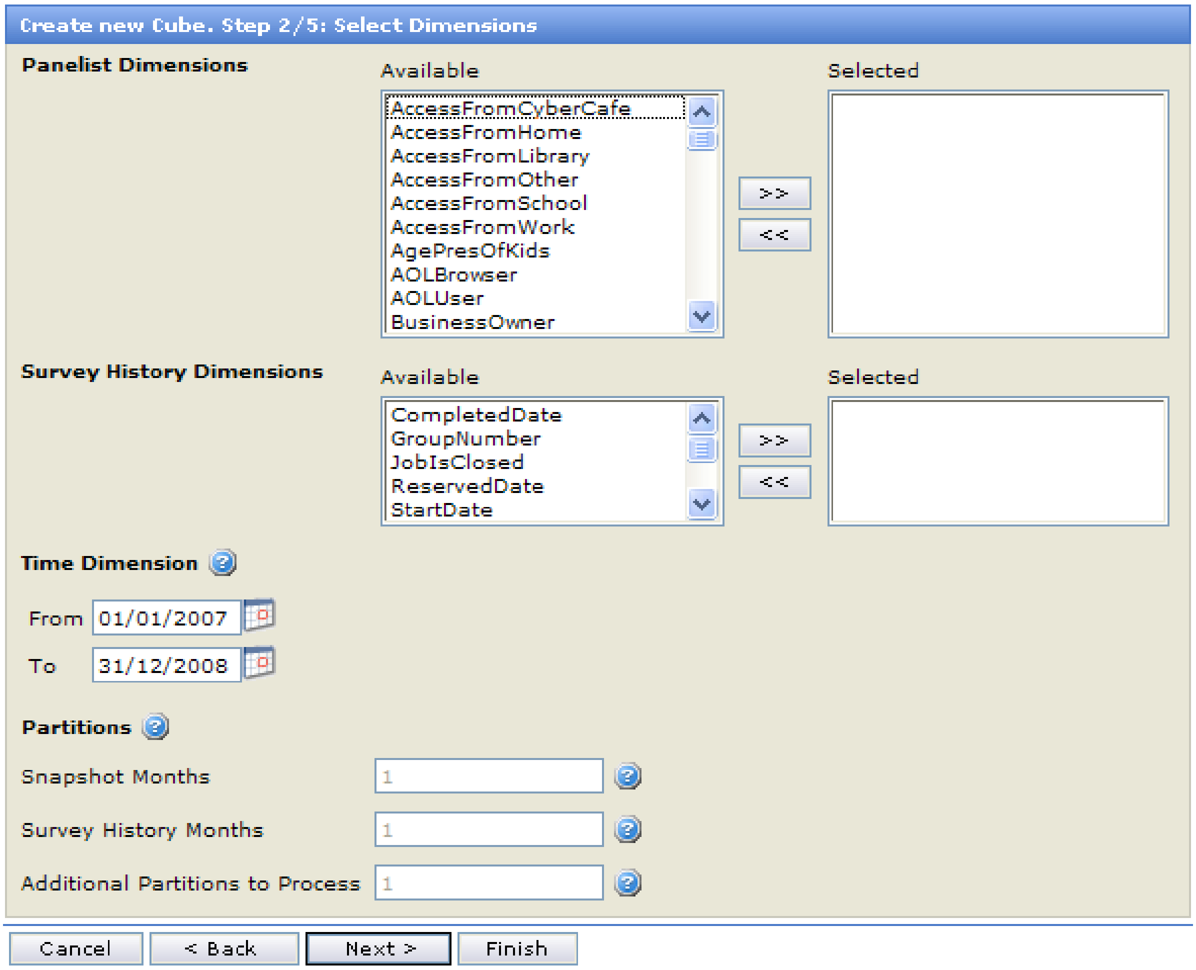


Figure 228 The Select Dimensions page

- 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.
  - **Snapshot Months** - specifies how many months of Snapshot data you would like in each partition.
  - **Survey History Months** - specifies how many months of Survey History data you would like in each partition.
  - **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 166 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.

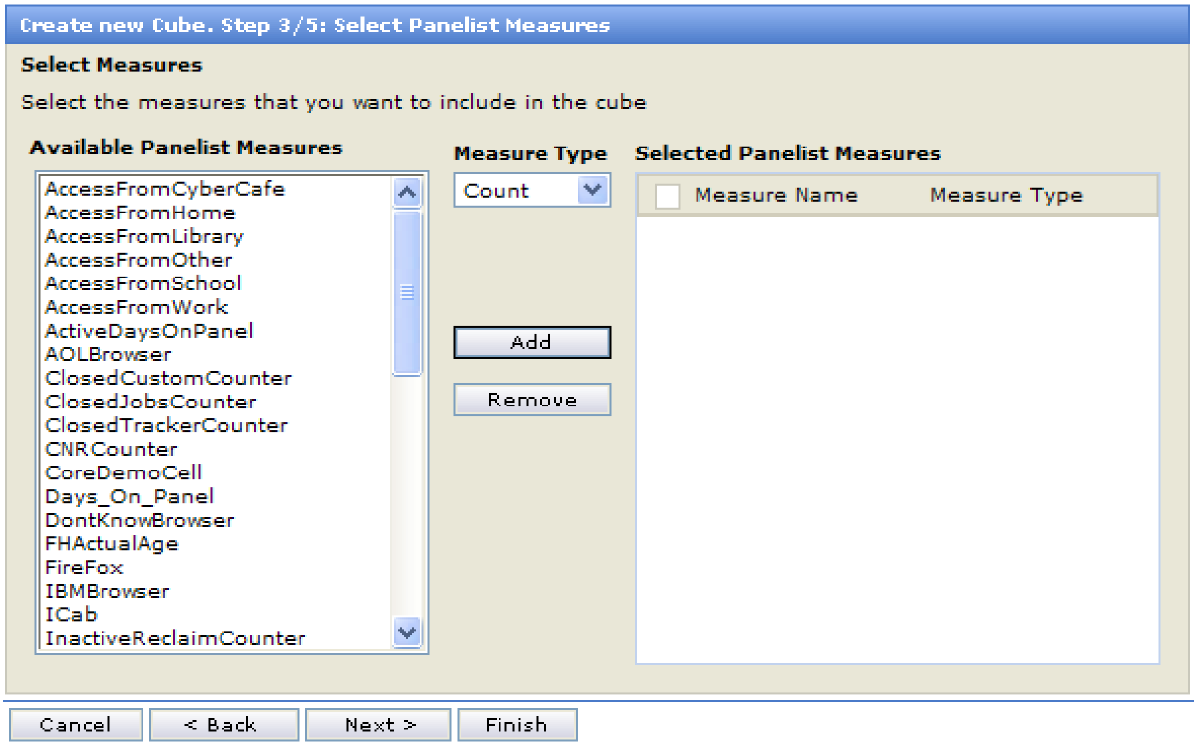


Figure 229 The Select Panelist Measures page

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.

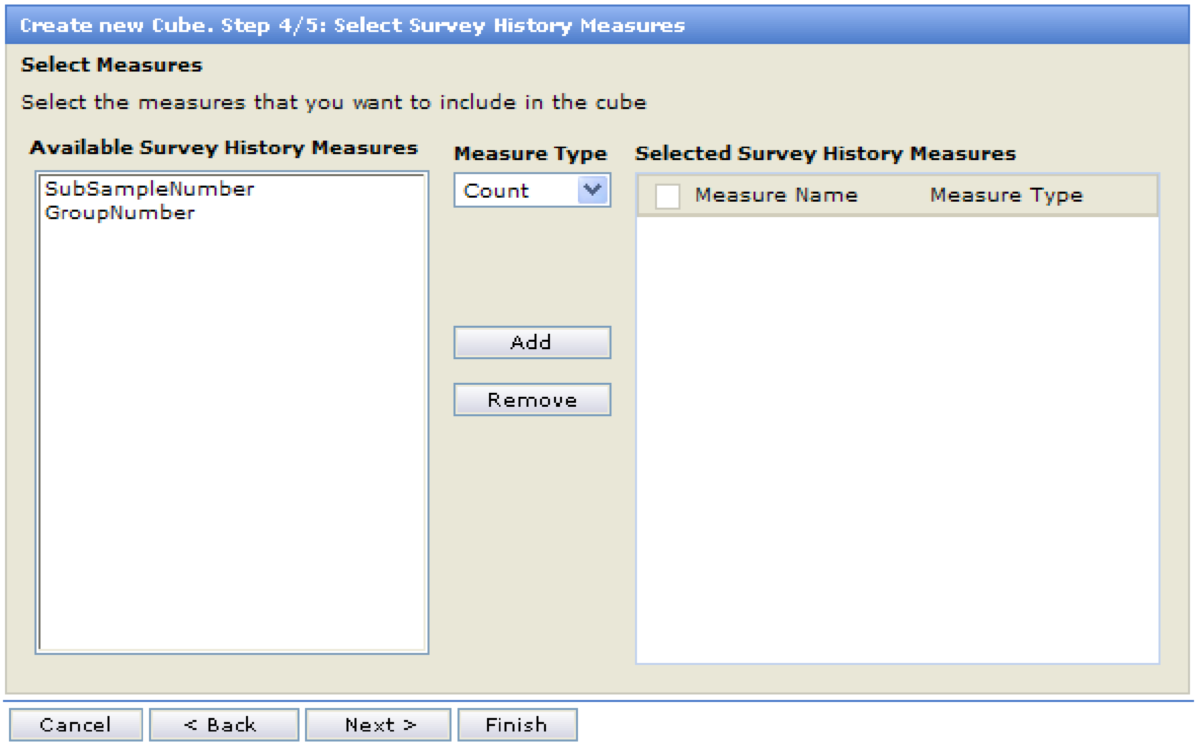


Figure 230 The Select Survey History Measures page

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.

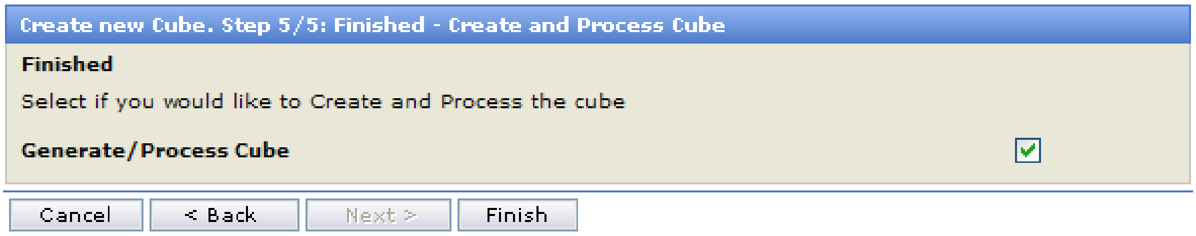


Figure 231 The Create and Process Cube page

12. Check the box if you wish to create and process the cube, then click **Finish**.

    The Generate and Process Cube page opens.

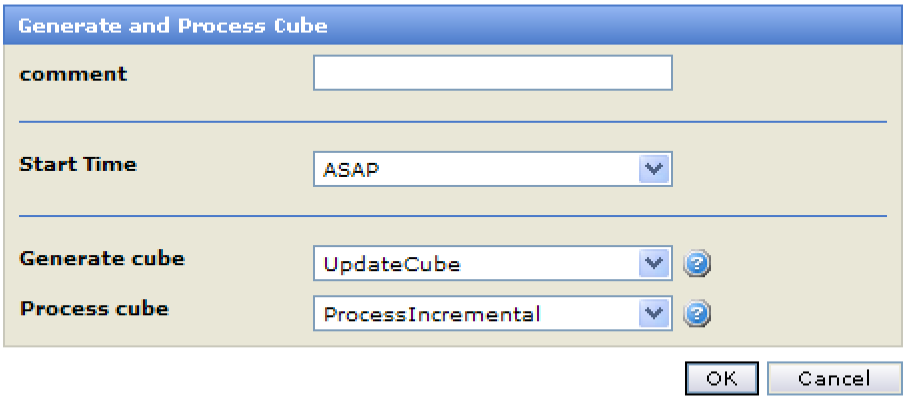


Figure 232 The Generate and Process Cube page

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:**
    - **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.
    - **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.
    - **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:**
    - **Process full** - processes all objects.
    - **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.
    - **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 165 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.

Note: The changes and functionality described in this here 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 > Survey Settings** menu command.

   The Survey Settings page opens.
2. Go to the **Web Options** tab.

   The Community Panel property is located towards the bottom of the tab.

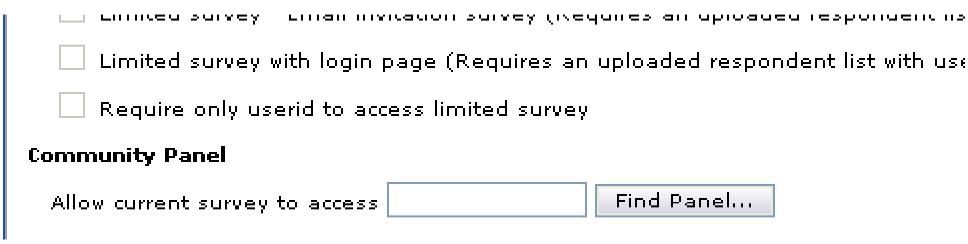


Figure 233 The Community Panel property

3. Type the Panel ID into the field, or :
4. Click the **Find Panel** button.

   The Find Community Panel window opens, with a list of the panels available to you.
5. Click on the appropriate radio button to select the required panel from the list.
6. Click **OK**.

   The window closes and the Panel ID is added to the field.
7. 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).

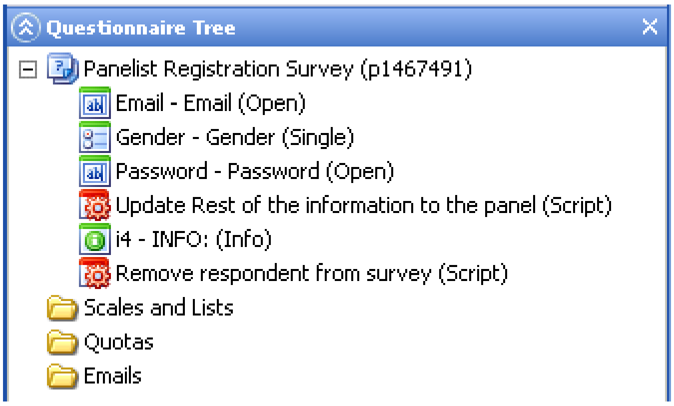


Figure 234 Example of a simple Panelist Registration survey

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.

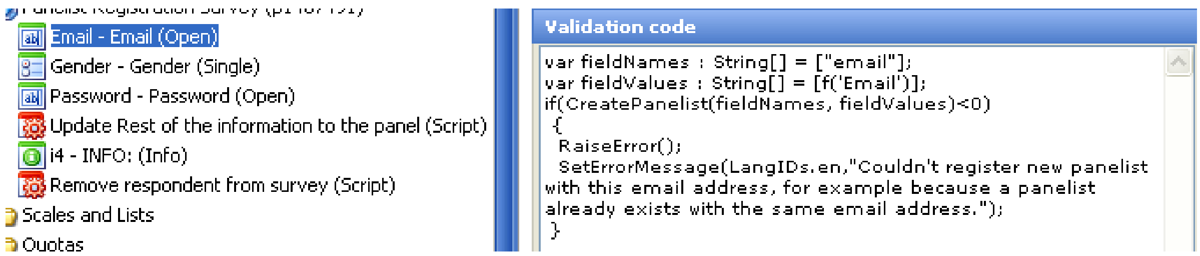


Figure 235 Example of script to check whether the email address already exists

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. The "update" script shown in the figure below performs this function.

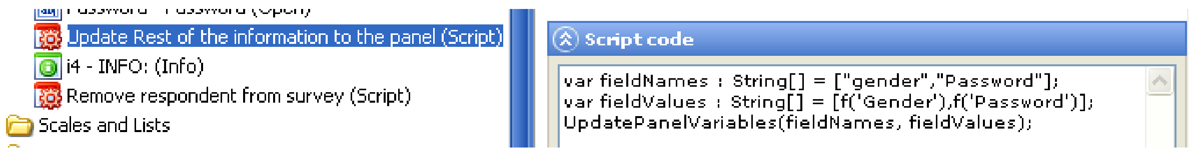


Figure 236 Example of the database registration script

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.

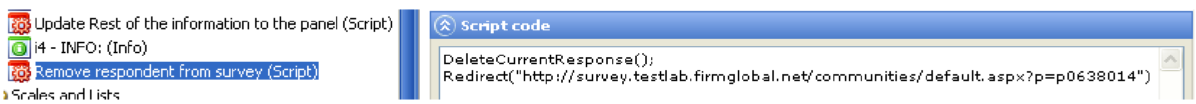


Figure 237 Example of script to delete the information from the survey

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.

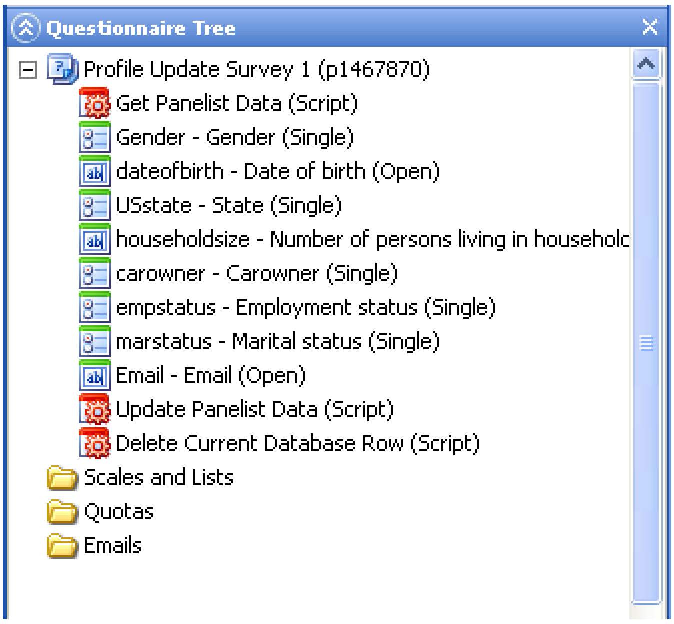


Figure 238 Example of a simple Panelist Update survey

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.

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.

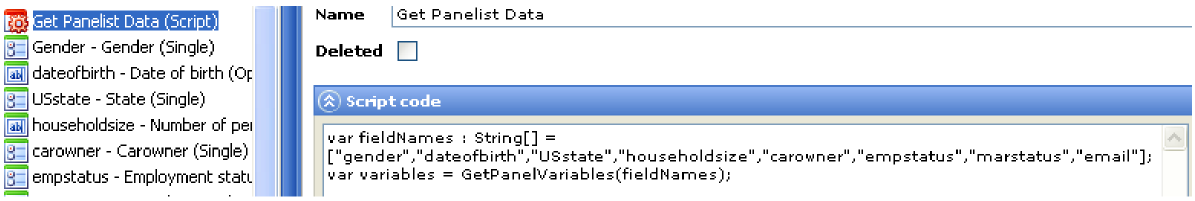


Figure 239 Example of script to fetch the data from the database

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.

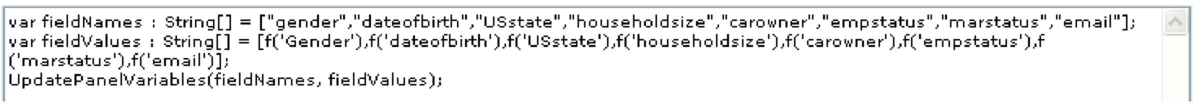


Figure 240 Example of script to update existing panelist information

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 241 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 242 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 172 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. Surveys using batch statusing have an additional requirement; the survey must include two “background” variables named 'JobNumber' and 'PanelistId'. Both these are open-text variables with a field width of 255 characters.

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