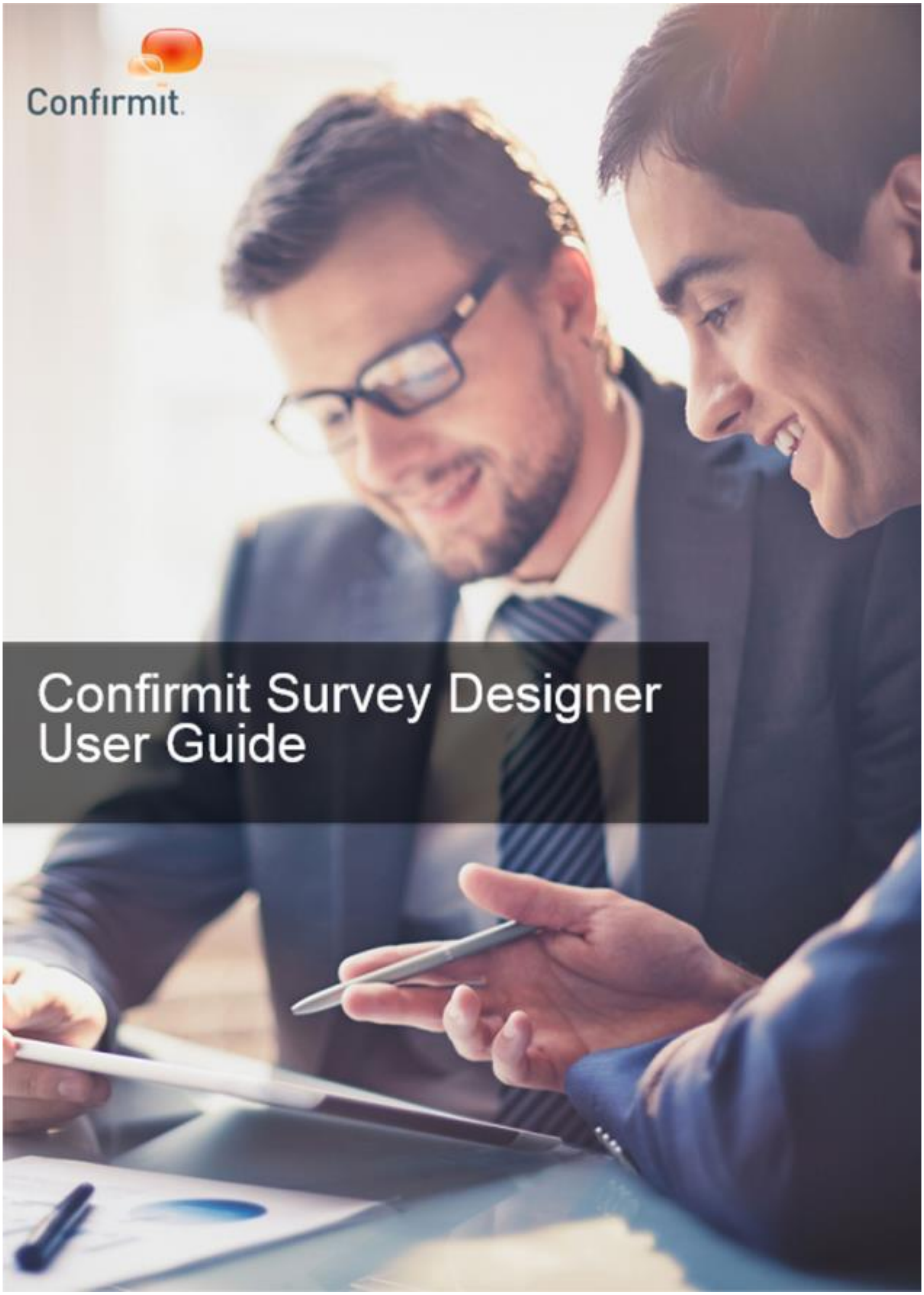

Confirmit Survey Designer User Guide

Confirmit Horizons v24

This is document revision 5 of the Confirmit Horizons v24 Survey Designer User Guide published in January 2019. The information herein describes Confirmit Horizons Survey Designer and its features as of Build nr. 24.0.550. New features may be introduced into the product after this date. Go to www.confirmit.com or check “News” on the Customer Extranet for the latest updates.

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What's New in this Revision?

Note: Only the latest changes to this documentation are listed here. Changes made to earlier revisions are listed in the "Changes to the User Documentation" document which can be downloaded from the Confirmit Extranet at https://extranet.confirmit.com. Note that you will need to log in to the extranet to download this document.

The following changes have been made in revision 5 of the Confirmit Horizons v24 Survey Designer User Guide:

- Minor changes to the text and illustrations are made throughout the user guide to reflect changes to icons and icon locations.
- The text in the What's New page is edited (see The What's New Page on page 10 for more information).
- The Getting Help page is added to the Introduction chapter (see Getting Help on page 13 for more information).
- Some text in the Setting Up the Survey section is edited for clarification (see Setting Up the Survey on page 40 for more information).
- The text in the Appearance Options section is edited to include the Star Ratings and Grid Bars property descriptions for single questions (see The Appearance Options on page 130 for more information).
- The text in the Grid Bars section is edited to include single questions (see Grid Bars on page 133 for more information).
- The Managing Quota Targets section is added to the Quotas section (see Managing Quota Targets on page 180 for more information).
- The Pipe Values Tool section is added to the Email Management chapter, and the text in the Email Content Tab section is edited to reflect this addition (see The Pipe Values Tool on page 220 for more information).

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

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

1. Introduction

Survey Designer is the next generation of survey creation software from Confirmit. The application enables you to create surveys at all levels of complexity, quickly and easily, using a modern and intuitive interface.

This documentation describes the Confirmit Survey Designer functionality. The functionality is currently under development and is continually being improved and added to, and this documentation will be updated to keep pace with that development.

Bear in mind that while Survey Designer will eventually encompass all the Confirmit Authoring functionality and will then supersede Authoring, until that time this documentation will only describe the functionality that is currently available in Survey Designer. You must log in to Confirmit Horizons to access the Survey Designer functionality, and you may also need to use the Professional Authoring application to perform some of the more complicated survey design work. To ensure you have full coverage of all the Professional Authoring and Survey Designer functionality, this documentation should be read in conjunction with the Confirmit Professional Authoring User Guide.

For system and browser requirements, refer to the Confirmit Horizons System Requirements document that is available on the Confirmit Extranet.

1.1. Logging into Confirmit Horizons

Note: For system requirements and prerequisites refer to the System Requirements document that is available for download from the Confirmit extranet at https://extranet.confirmit.com.

A valid username and password are required to log into Horizons. Once you are logged in, a "user object" controls your access to any other object in the application.

Important
You can log in to Confirmit Horizons via a number of different Internet browsers, and the browser manufacturers' interpretations of web standards may vary. This can result in slight differences in color, positioning and functionality across the different browsers. Confirmit therefore recommends that you test your surveys, Panel Portal surveys, and Reportal Viewer/Public Reports on a variety of browsers to ensure they look and function as expected in all cases.

Log in to Horizons using one of the URLs below:

- USA site: https://author.confirmit.com
- Euro site: https://author.euro.confirmit.com
- Australian site: https://idp.confirmit.com.au

SaaS only:
You can log in to Confirmit by clicking the appropriate link on the Confirmit home page, https://www.confirmit.com/.

When you access the link or the URL, the Confirmit Horizons login page opens. Here you type in your user name and password, and click **Sign in**. If your browser does not meet the browser requirements, an error message will be displayed.

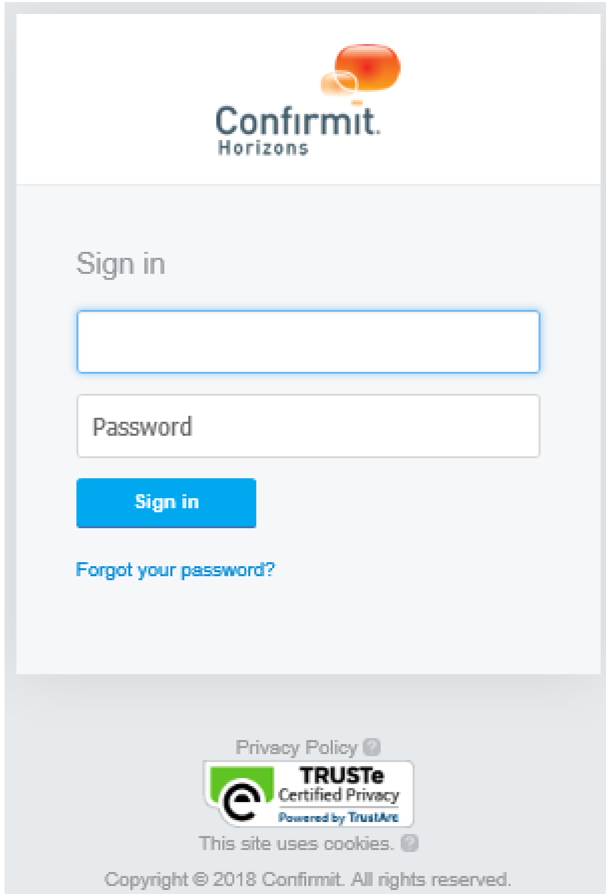


Figure 1 The Confirmit Login window

- If you are a new user entering Horizons for the first time, you will have been given a "startup password" by your administrator. The first time you log in you will be prompted to change that password to one known only to yourself. Before your password is accepted it will be checked to ensure it meets the preset complexity requirements.
- If 2-step verification is enabled for your account, input the required 6-digit code (see Using 2-Step Authentication on page 3 for more information).

Important
If someone attempts to log in with an incorrect username and/or password, the number of attempts made is counted. When the counter reaches a preset limit, Confirmit will lock for that user and a message will be displayed telling the user that they must contact their administrator to be given access. The user will not be able to log in again until the account is reopened. An email will also be sent to the user's registered email address informing them that they can use the Forgotten Password functionality to reopen their account.

Note: If you forget your password you can click the link below the login page (see Forgotten Password on page 3 for more information).

For On-Premise customers, the Confirmit system administrator can set the permitted number of attempts in the registry settings. The default number of attempts is 3.

When there are 30 or fewer days remaining to the license expiry date, a warning message will be displayed when you log in.

When you log into Horizons, the home page opens (see The Horizons Homepage on page 6 for more information).

1.1.1. Forgotten Password

Your Confirmit password is what prevents unauthorized people from using your Confirmit account and interfering with your surveys. You must therefore ensure your password is known only to you and is difficult to guess. This of course can create problems - if you should forget your password then you will not be able to use Horizons. The Horizons login page therefore includes the possibility for you to reset your password should you forget it. To do so:

1. Click the **Forgot your password?** link below the login page.

   The dialog shown below opens.

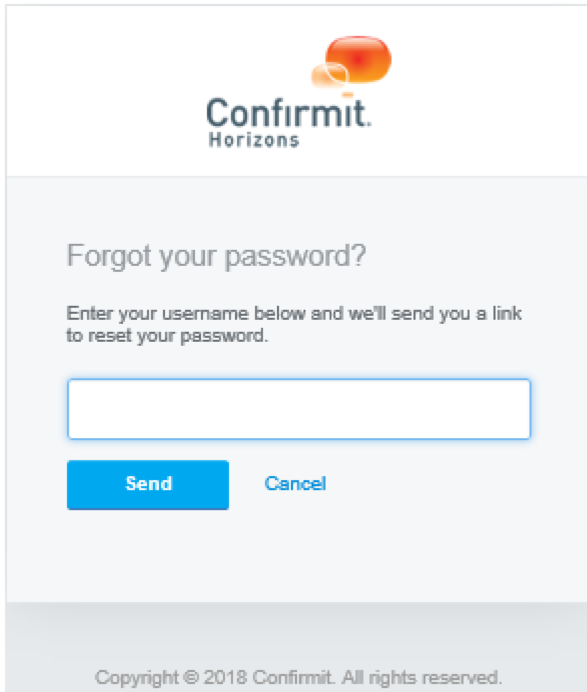


Figure 2 The "Forgot your password?" dialog

2. Type your user name into the field and click **Send**.

   An email is sent automatically to the address registered to the username you have given. The email contains a link and instructions for how you can reset your password. Note that the system is automated and "internal" to Horizons so is identical for SaaS and On-premise users.

Note: The reset password link is time-limited and is only valid for one hour. If you do not reset your password within that time then the link will expire and you must repeat the procedure to be sent a new link.

1.1.2. Using 2-Step Authentication

When 2-step authentication is enabled for your Confirmit account (see User Settings on page 8 for more information), when you log in to Horizons you will need your password and a 6-digit code that is generated by Google Authenticator™.

So set up Google Authenticator™:

1. Download the Google Authenticator™ app onto your mobile device.
2. In Horizons, click the **User menu** icon to open the User Settings overlay and beside the 2-step authentication property click **SETUP**.

   The 2-step authentication overlay opens with a QR code.

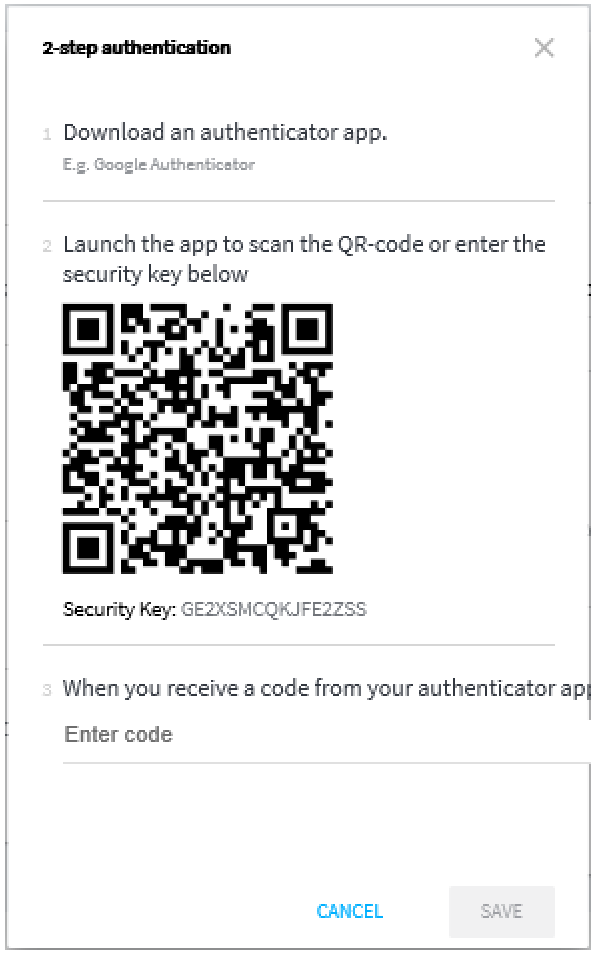


Figure 3 Example of a QR code generated by Confirmit for Google Authenticator™

3. Using your mobile device, scan the QR code.

   A 6-figure code number is generated and presented on your mobile device.

4. Enter the number into the field towards the bottom of the overlay and click **SAVE**.

   The authenticator overlay closes and you are returned to the User Settings page. 2-step verification is now activated.

   With the current settings you will need to generate and input a new 6-digit code every time you log in to Confirmit Horizons. You can however set the browser to be "trusted"; this you can do the next time you log in. The computer and browser you use to log in to Confirmit Horizons will then allow you access for 30 days without having to input the 6-digit code. After 30 days you will need to generate and input a new code. Note that if you log in to Confirmit Horizons from any other computer or using a different browser then you will need to input a code again.

To disable 2-step verification, in the User Settings page click **DISABLE** beside the 2-step authentication option. Note that if you for example lose your mobile device, your system administrator can access your user settings and disable this functionality for you.

Logging in to Confirmit using Google Authenticator™

When 2-step authentication is enabled, when you log in to Confirmit Horizons, after entering your username and password you will be asked for a 6-digit code.

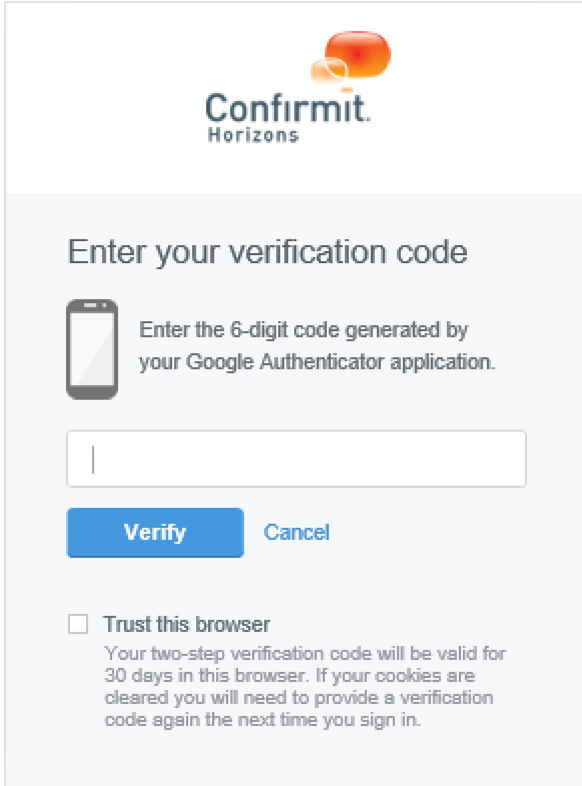


Figure 4 Logging in using 2-step verification

1. On your mobile device, run the Authentication app to generate the required code and enter the code into the field.
2. If you wish to "Trust this browser", check the box. You will then be able to log in using the current browser for the next 30 days. After this time you will need to input a new 6-figure code.
3. Click **Verify**.

   Confirmit Horizons opens.

1.2. The Timeout Overlay

Whenever a Horizons user (not a respondent) logs on to the application, a new session object is created on the server. This object holds information about the author's state (current survey, etc), and the Web server allocates memory for this state information. By maintaining this information as you move from page to page within Confirmit, the individual requests to the server are kept small and simple. However, the Web server does not want to keep track of this information when you exit the Web application, and it is possible to exit the application without explicitly sending a 'log off' command to the Web server.

Therefore for security reasons, if the time between author-requests exceeds 60 minutes (perhaps you have gone to a meeting and left Confirmit running), an automatic time-out occurs. At this stage the login overlay is displayed on your monitor in front of the Confirmit window. If you now re-enter your password (your username will be remembered), you can continue the session where you left off.

However once the login overlay time-out is reached (after a further 180 minutes), Confirmit assumes you have logged off and frees the memory holding the state information. This is then lost, so if you log back in after the time-out you will be redirected to the first page of the Web application.

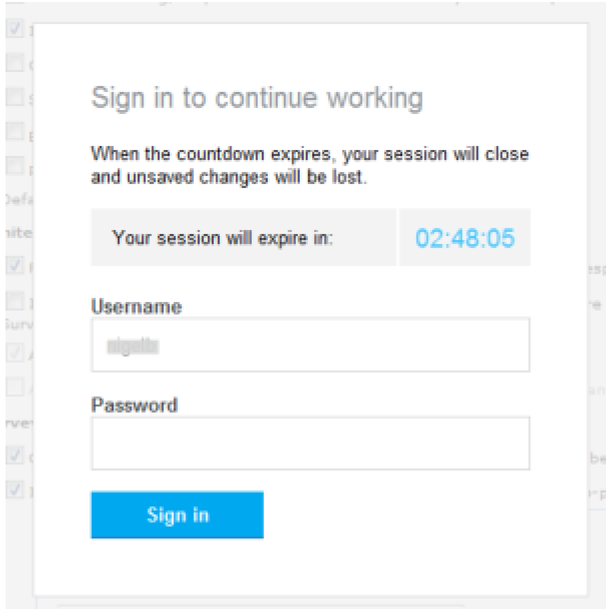


Figure 5 The login overlay that is displayed when a Confirmit session has timed-out due to inactivity

Note: If you have made some changes in your survey and the login overlay appears before you have the chance to save them, then all is not lost. If you log again in before you are locked out, Confirmit will reopen at the page you were last in and will remember the changes, allowing you to continue where you left off (and save your changes at your earliest opportunity!).

1.3. The Horizons Homepage

The Horizons Homepage is common to the majority of Confirmit's applications. When you first log in to Horizons this page opens, and it provides access to all the Confirmit applications that you are licensed to use. Click the appropriate icon to go to that application. Note that if you are not licensed to use an application, its icon will not be displayed in the page.

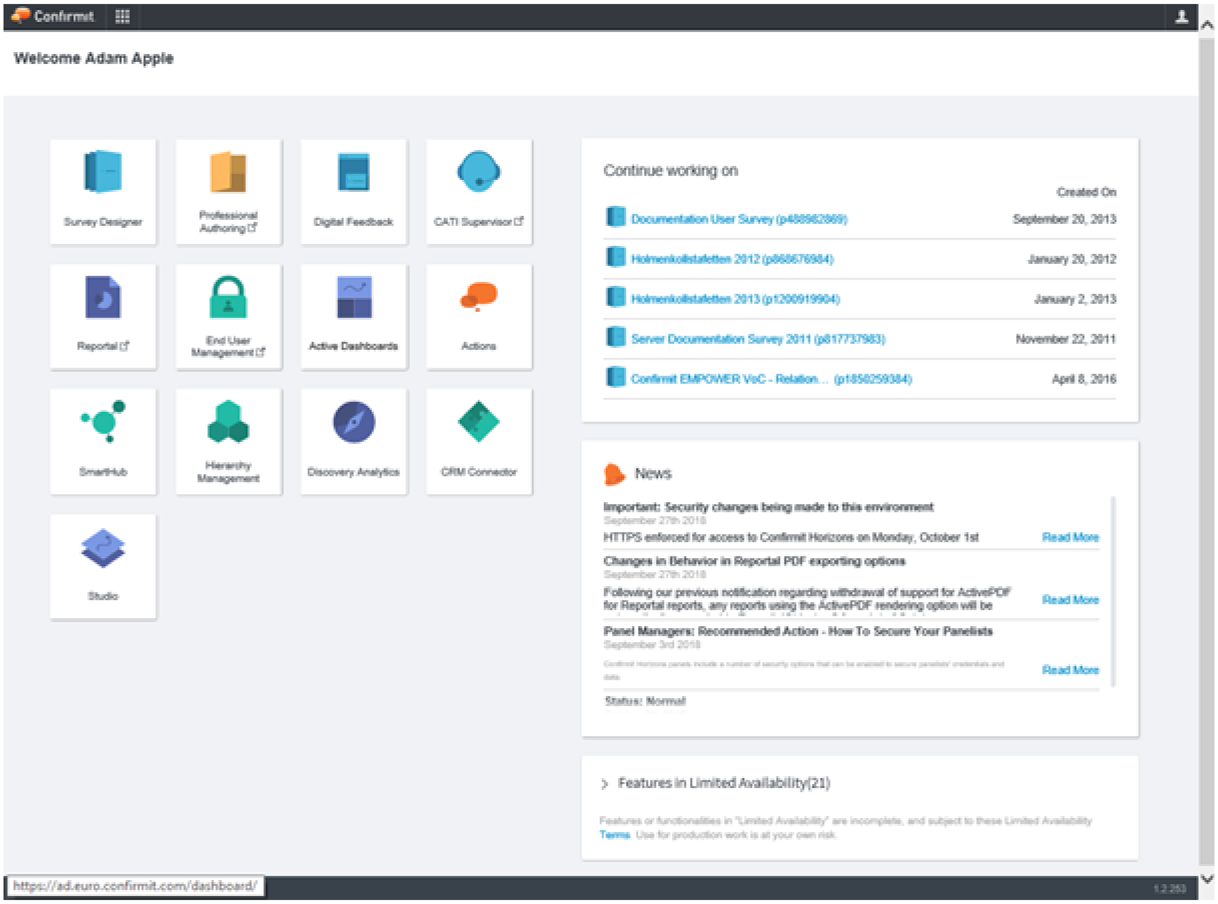


Figure 6 Example of the Horizons Homepage

Note: Applications that do not yet have a waffle icon have ↗ beside the application name. These will open in a new window, allowing this Homepage to remain open while you are working in the selected application.

Towards the right side of the Homepage is a list of projects you have recently been working on. This provides easy access to those projects - click on a project to open it.

Below the recently used list is a list of news items. These news items provide information on the latest changes, and other features and functionality that have recently become available.

Towards the bottom of the page is a list of the functionality currently accessible under "Limited availability". These items are still undergoing development, but are made available for testing purposes if your company has agreed to trial them. Please note that use of this new functionality for production work is at your own risk.

1.4. The Waffle Icon

The **Waffle** icon in the main toolbar is common to the majority of Confirmit's applications. Click the icon to open a selection overlay providing access to all the other Confirmit applications that you are licensed to use, and to the Horizons Homepage (see The Horizons Homepage on page 6 for more information). If you are logged in to Horizons and you wish to change to a different application, click the waffle icon and select the appropriate application. The current application is underlined and is also named in the toolbar. Note that if you are not licensed to use an application, its icon will not be displayed in the overlay.

Figure 7 The application selection overlay

Icons with an “arrow” beside the product name open Authoring or Reportal, icons without the arrow take you directly to the selected application. Refer to the separate user guides for further information on the various applications.

The **Survey Designer** button beside the waffle icon is always available while you are in Survey Designer, and returns you directly to the Surveys list (see The Surveys List on page 15 for more information).

1.5. The User Menu

At the right end of the Confirmit toolbar is located the **User Menu** button. This button opens a menu enabling you to access your user settings (see User Settings on page 8 for more information), and to log out from Horizons.

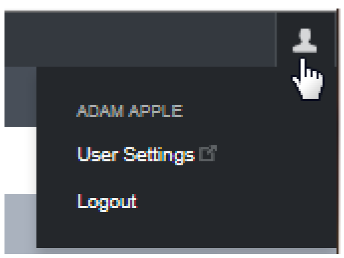


Figure 8 The User Menu button and menu

1.5.1. User Settings

Each user has a profile created on initial registration. The profile holds information about the user’s name, email address, preferred language and screen resolution, and a number of system settings. Each time you log in to Horizons, your profile will be accessed and the settings stored in your profile will be used to set up the system specifically for you. On initial registration default settings will be used, but you can go into your profile at any time and edit the majority of the settings as you require.

To do this, click the **User Menu** button in the upper-right corner of the Horizons window and select **User settings**. The User Settings window opens.

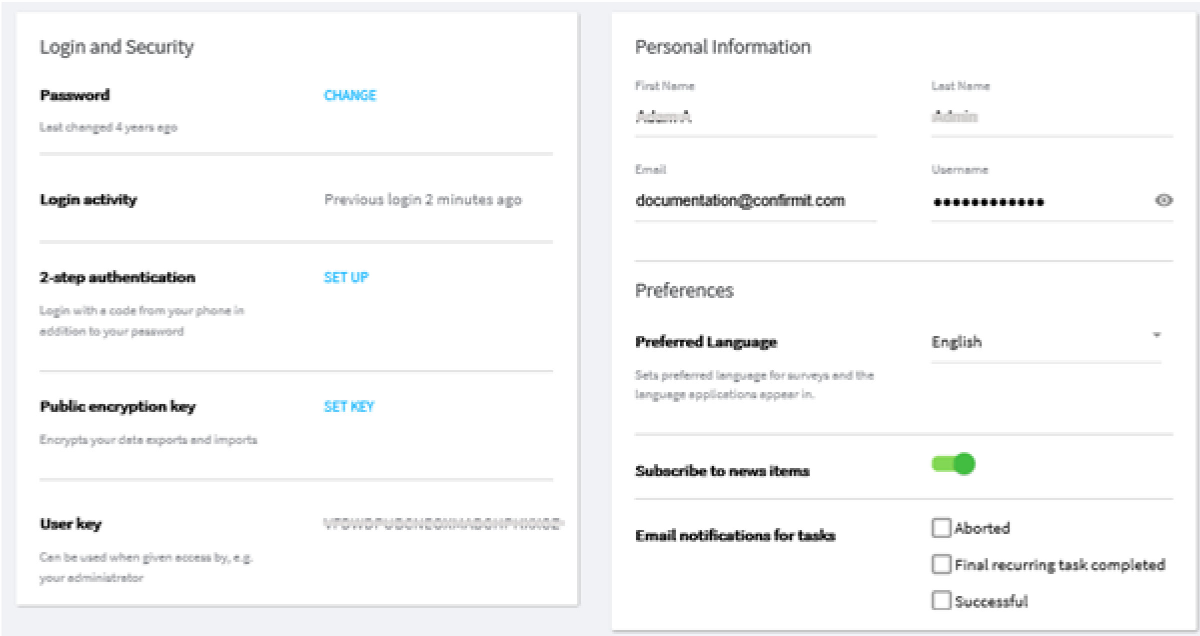


Figure 9 Example of the User Settings window

The properties and fields are as follows:

- **Password –** click the link to open the Change Password dialog.
- **Login activity -** shows when you last logged in to this account.
- **2-step authentication-** an optional additional security measure that requires Google Authenticator™ in addition to your username and password when you log into your Confirmit account (see Using 2-Step Authentication on page 3 for more information).
- **Public encryption key -** set your public key so you can encrypt your data exports and imports.
- **User key –** unique to each user. To make yourself "visible" to Confirmit users outside your organization, you will have to supply them with your user key.
- **First name /Last name –** the name of the user. Used mainly for interaction with other users.
- **Email –** the user's email address. This address is used by the Horizons message system to send messages to the users. This is also the default email address where requested report and export files are sent. To assist with system security, if this email address is changed then a notification email is sent to the old address. This field can be left empty.
- **Preferred language –** the preferred language you wish to use for your surveys.
- **Subscribe to news items -** select (green) to receive news items as emails.
- **Email notifications for tasks -** you will be sent notification emails when specific events occur:
  - **Aborted –** you are sent a notification email when a task is aborted (export, import, etc.).
  - **Final recurring task completed -** you are sent a notification email when a recurring task has run for the last time.
  - **Successful –** [not Standard user] you are sent a notification email on the successful completion of each task.

1.5.2. Logging Out

When you are finished using the Survey Designer, the normal procedure is to log out. This closes Survey Designer in the correct sequence, ensuring all work and any changes to settings etc. are saved. To log out, click the **User Settings and Logout** button in the upper-right corner of the Horizons window and select **Logout**. The Survey Designer window closes and you are taken to the Confirmit Login dialog.

1.6. The What's New Page

When you first log in to Survey Designer, an "In App news" page may open. This allows Confirmit's product managers to introduce new functionality and changes directly to you, the users. This is not intended to be a course in how to use the new functionality; it is merely to highlight functionality that has changed recently.

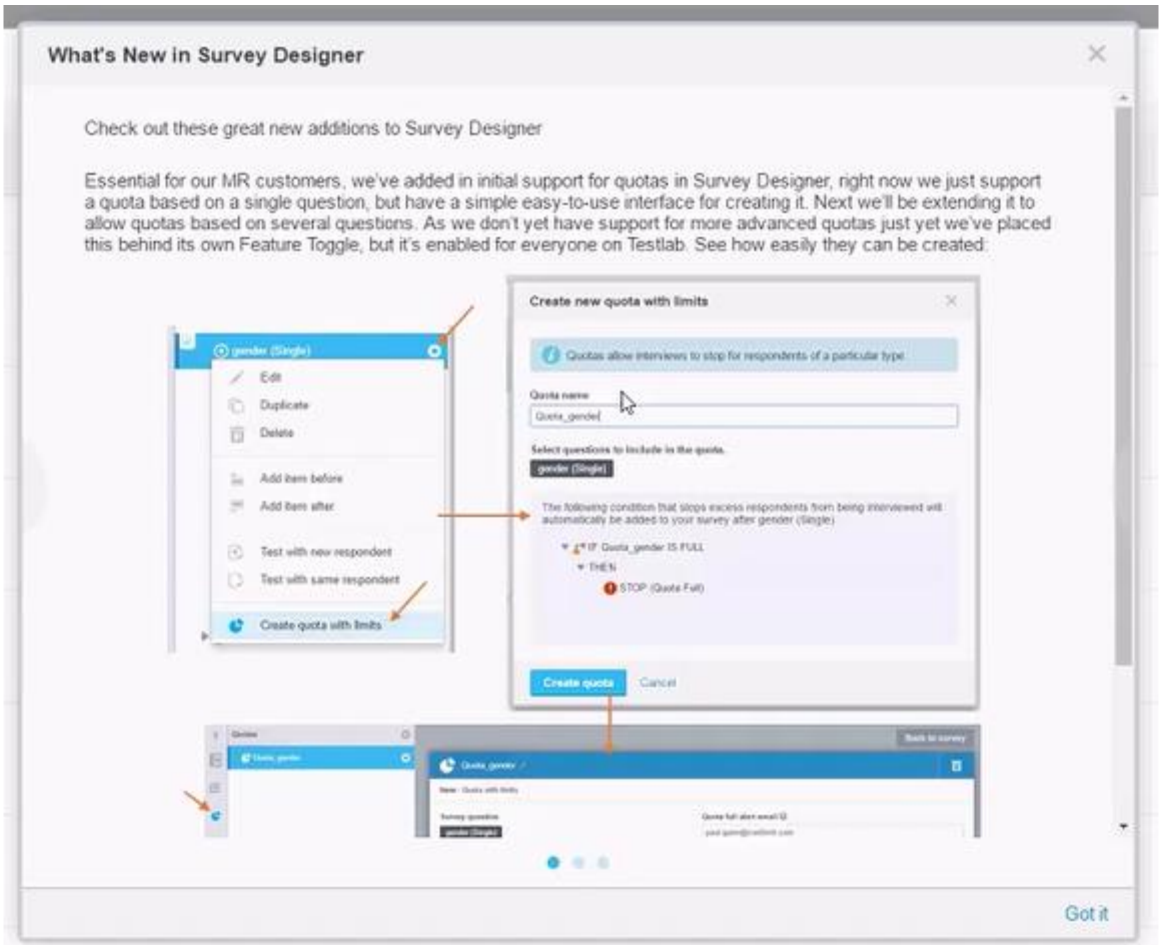


Figure 10 Example of the What's New page

The colored dots towards the bottom of the page indicate how many pages of information are available - click on a dot to go to that page.

Once you have finished reading the news items, click **Got it** in the lower-right corner of the page to close the page. It will then not reopen automatically until a new news item is published.

Note that you can reopen the news items manually by clicking the **Help** button in the upper-right corner of the Survey Designer window and selecting **What's new**.

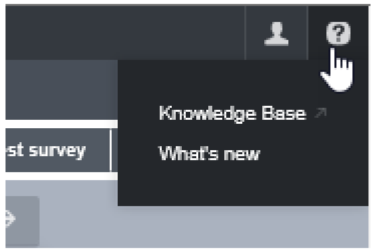


Figure 11 Reviewing the What's New items

Using this method an overlay opens in which you can view all the published What's New items.

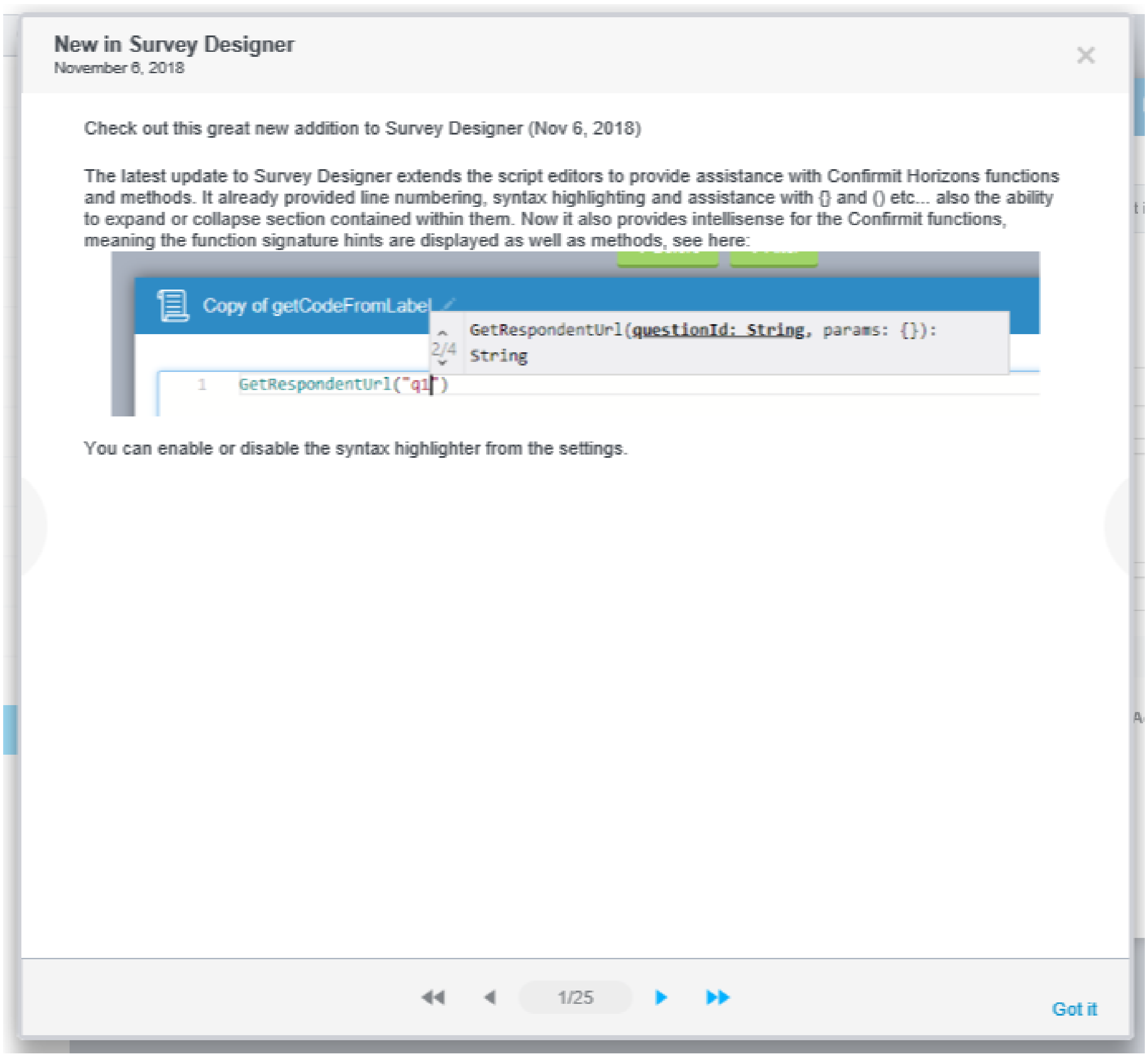


Figure 12 Example of the What's New review page

The newest page is displayed first; use the **Next** and **Previous** buttons below the page to move between pages. The date the information was published is displayed in the upper-left corner of the overlay. When you have finished reading the news items, click **Got it** in the lower-right corner to close the page.

1.7. Survey Designer Upgrades

Confirmit's Horizons SaaS platforms are typically upgraded four times a week (Monday through Thursday), enabling us to quickly deliver new capabilities on the platform. To ensure there are no potential compatibility issues for users who are logged in when an upgrade occurs, immediately the upgrade is deployed a check is performed to ensure any already logged-in browsers are running the latest Survey Designer version. If not, you will be prompted to reload your page. By doing this, any potential incompatibility issues for users who were working during the upgrade will be avoided.

Please bear in mind that as the page must reload, any unsaved changes will be lost. However, changes are saved automatically as you make them (see Saving Changes on page 12 for more information), so losses will be minimal, if any.

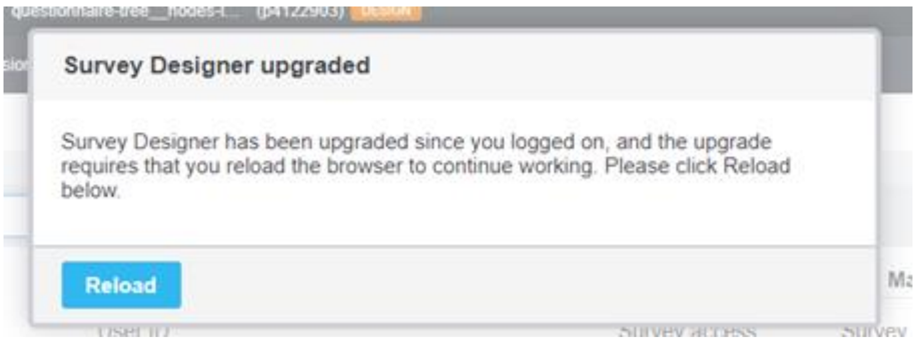


Figure 13 The Survey Designer Upgraded message

1.8. Saving Changes

By default, Survey Designer automatically saves all changes as you make them, however you can switch off the auto-save functionality - see below.

When auto-save is switched on:

When you make changes a message appears in the center of the toolbar at the top of your screen informing you that the system has registered that changes have been made. After a few moments the changes will be saved automatically, and a new icon appears to inform you of this. Note that when auto-save is switched on you do not need to save changes manually so there is no **Save** button available.

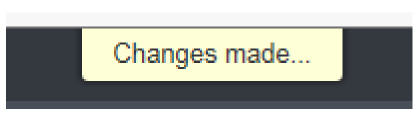


Figure 14 The Changes made icon

Figure 15 The Saved icon

If you should attempt to navigate away from the page before the save process is complete, a message will appear telling you that the changes are being saved, and the system will wait until the changes have been saved before moving to your next page.

If the system notices an error that means your changes cannot be saved, then a message is displayed asking you to correct the error and informing you that the changes have not been saved.

To switch off auto-save:

Note that you can switch off the auto-save functionality. To do this, set the **Auto-save** toggle located in the upper-right corner of the window to **Off**. The setting is remembered for the current user on the current browser, so if you log in later using the same browser the setting will be as you left it.

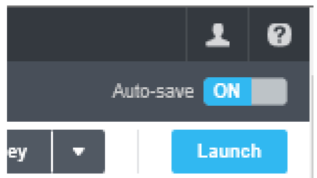


Figure 16 The Auto-save toggle

If you switch off auto-save, when you make changes to a survey a message is displayed in the center of the toolbar at the top of your screen. This message informs you that the system has registered that changes have been made, and a **Save** button is displayed next to it. Click **Save** to save your changes.

Figure 17 The Save button

If you attempt to navigate away from the page while you have unsaved changes, a message will appear informing you of this. You can then save or reject the changes.

Undoing changes:

If you wish to undo the changes you have just made, the Saved icon remains visible for a few seconds - click the blue "undo" arrow  beside the message to undo the changes. You can also go to the Designer log and use the Undo Change functionality available there (see The Designer Log on page 24 for more information).

1.9. Getting Help

Survey Designer contains a built-in context-sensitive on-line help system to provide you with assistance should you require it. Click the **?** button, located in the upper right corner of most of the windows, to open a drop-down menu, and click **Knowledge Base** to open the help page for that window. Most of the pages contain links to additional information and related topics – click the links to go to those pages. Use the **Back** and **Forward** buttons to navigate through previously opened pages.

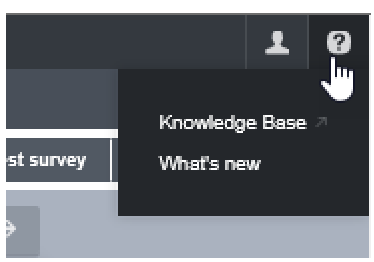


Figure 18 The User Assistance button

Many of the properties in the various property sheets also have help texts associated with them. Click the **?** button beside a property to view additional information about that particular property.

Remember that you can also download the latest revisions of all the Confirmit User Guides in .CHM and .PDF formats from the Confirmit Extranet at https://extranet.confirmit.com. You will need to log in to the extranet, then you can filter the list and search for the documents you need.

If you are experiencing problems achieving the results you want, or you have any other support-related issues such as questions concerning specific functionality, please contact the Confirmit Support team at support@confirmit.com.

1.10. The Browser Back Button

The **Back** button in your browser saves the history of your movement through Survey Designer for the current session. This means that if you wish you can go directly back to a page, for example a particular question, that you were working with earlier.

To open the history overlay, either right-click on the browser **Back** button or place the pointer onto the **Back** button then click and hold the left mouse button.

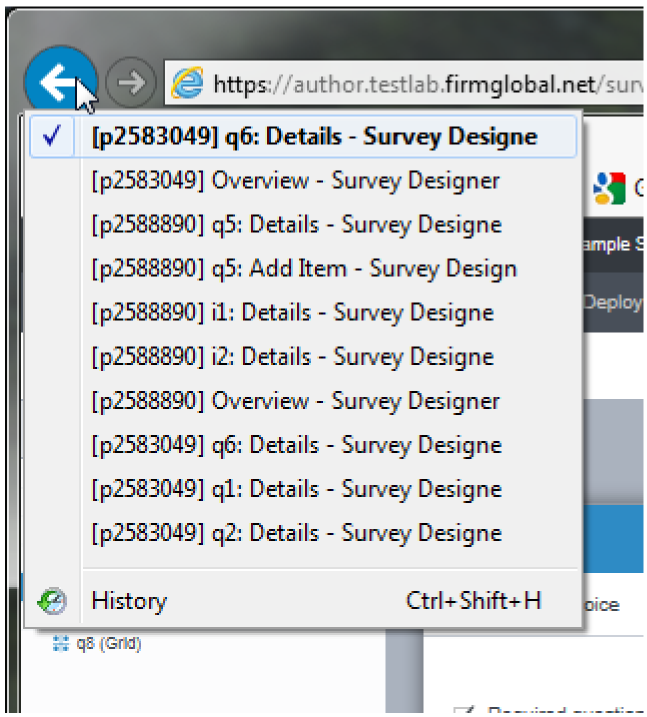


Figure 19 Accessing the history list

Click on the desired page to go directly to that page.

2. The Surveys List

When you click on the **Survey Designer** link in the Confirmit Professional Authoring Quick Access pane, or select Survey Designer from the Horizons Homepage (see The Horizons Homepage on page 6 for more information) or the waffle overlay (see The Waffle Icon on page 7 for more information) from another application, the Survey Designer application opens and you are taken to the Surveys list. This page lists all the surveys you have access to (including Benchmark, Library and Template surveys). You can filter the list and search for specific surveys (see Searching and Filtering the List on page 17 for more information), and you can sort the list as you wish (see Sorting the List on page 17 for more information).

Note: Surveys created using Confirmit Express are not listed in Survey Designer because those surveys can contain code that is not compatible with Survey Designer. However if you convert an Express survey to be a Professional survey (refer to the separate Professional Authoring User Guide for details) then the survey will appear in the survey list and can be opened in Survey Designer.

The **+/-** button in the upper-right corner of the list allows you to select which of the key metrics columns (invitations, completes etc.) are displayed. Click the button, then check/uncheck the boxes in the drop-down as required.

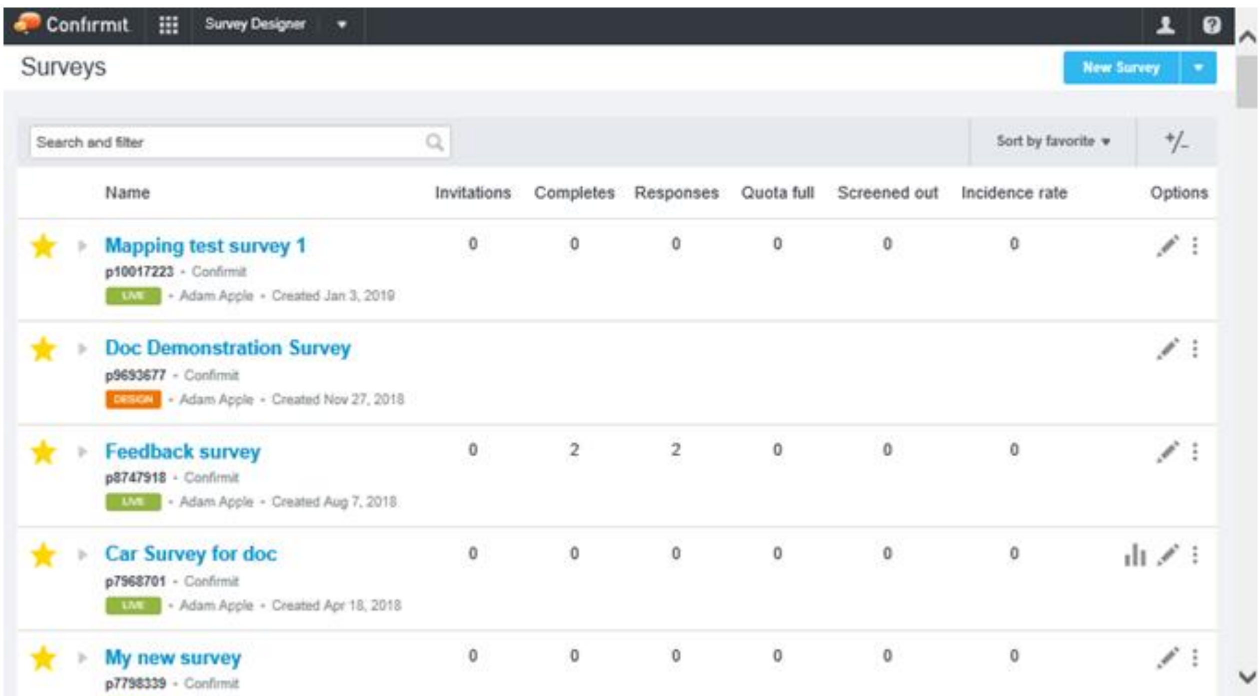


Figure 20 The Surveys list layout

Click a blue survey name link to open that survey (see The Design Page on page 53 for more information).

Note: Key metrics data is available only for surveys launched after the functionality described in this document was released. If no key metrics data is displayed for a survey then you will need to re-launch the survey.

Note: The key metrics count information is taken from the hub to which the survey is attached. As the hub data is updated at five minute intervals, the count information can be up to five minutes old.

2.1. The List Details

All the surveys that you have access to will be listed in the Survey List, along with some information about the survey.

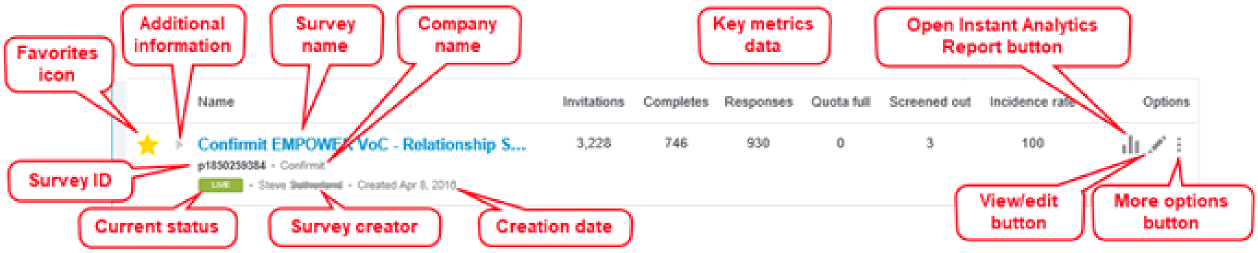


Figure 21 The survey details presented in the list

- **Survey name -** the name given to the survey when it was created. You can edit the name in the survey's Overview page (see The Overview Page on page 22 for more information).
- **Company name -** the name of the company to which the survey is registered.
- **Creation date -** the date the survey was created.
- **Survey creator -** the user name of the user who created the survey.
- **Current status -** the status of the survey (see The Status Area on page 23 for more information). The statuses are:
  - o **Design** - (orange icon) the survey has not yet been launched.
  - o **Live** - (green icon) the survey has been launched and response data can be collected.
  - o **Maintenance** - the survey has been launched but changes are being made to the survey so respondents cannot access it. This setting can be toggled manually in the Overview page.
  - o **Closed** - (blue icon) the survey is closed to respondents. This setting can be applied automatically on a preset date, or it can be toggled manually in the Overview page.
- **Survey ID -** the identification number given to the survey when it is created. This cannot be changed.
- **Favorites button -** click to designate the survey as a "Favorites". This allows you to more easily identify specific surveys in the Survey List, and this also allows you to sort the list such that "favorite" surveys are placed at the top. Note that you can also designate a survey as a favorite from the survey's Overview page (see The Overview Page on page 22 for more information).
- **Additional info -** expands the row in the list and displays additional information about the survey.
- **Key metrics data -** six columns of data are provided for immediate viewing:
  - o **Invitations** - the number of email invitations that have been sent out.
  - o **Completes** - the number of complete responses that are registered for the survey.
  - o **Responses** - the number of respondents who have started the survey (this will include completes and all forms of incompletes including quota stops, screens, errors etc.).
  - o **Quota full** - the number of respondents who have been denied access to the survey because relevant quotas are full.
  - o **Screened out** - the number of surveys where the respondent has been closed out due to constraints defined in the survey (for example the respondent does not use the relevant product).
  - o **Incidence rate** - the percentage of respondents who were willing to complete the survey and who were actually qualified to do so.

  Note that these columns will be blank until the survey is launched. The +/- button in the upper-right corner of the Surveys List allows you to select which of the key metrics columns are displayed.
- **Open Instant Analytics Report button -** the Instant Analytics Report for the survey will be generated when the survey is launched. Once the report exists the icon will be visible in the survey list. Click the icon to view the report.
- **View/edit button -** click to open a new browser window with the survey open in the Designer page.

- **More Options button -** provides additional options for the survey. Here you can open the survey's Overview page, and duplicate or delete the survey.

2.2. Searching and Filtering the List

If you have access to a large number of surveys, the survey name Search field at the top of the list allows you to more easily find a specific survey.

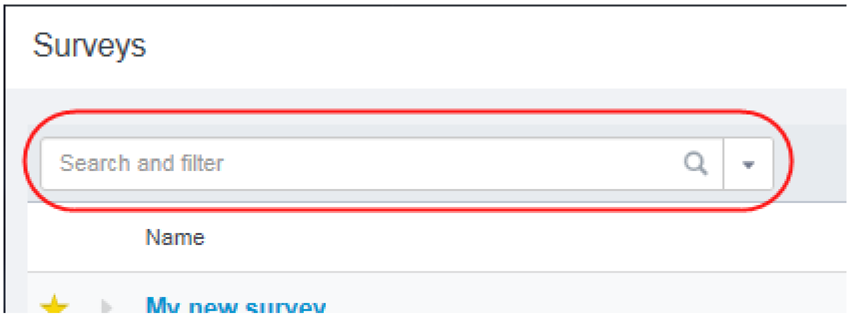


Figure 22 The Search and filter field

Start typing a text string into the Search field. As you type, the Surveys list will be filtered such that it only holds the surveys where the survey name, the survey number, the company name, the user name or the creation date contains that text string. The search is performed as "contains, in any word", so the text string can appear anywhere in the details. You can type partial words, multiple words, type them in any order, and separate them with a space; you do not need to use the ***** wildcard. The search field will accept alphanumeric, punctuation, underscore and space characters, and is not case-sensitive.

2.3. Sorting the List

You can sort the Surveys list by the most recently opened, the creation date, favorites, the survey name (alphabetically), the survey status (first Design, then Live, then Closed), or by the creator's name.

To sort the list, click the **Sort By...** button and select the desired criteria from the drop-down list..

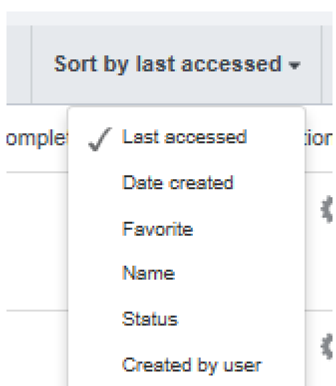


Figure 23 The Sort by... menu

The default sort criteria is Last accessed. Once you have selected a sort criteria, the **Sort by...** button shows this. Confirmit remembers from your previous session which sort criteria was used, and the next time you log on Confirmit opens with this sort criteria selected.

If you click on the Name column header, the list is sorted alphabetically by the name of the survey. Click again to reverse the sort order. An arrow indicates the direction of the sort order.

2.4. Mobile Layout

If you log in to Horizons on a tablet or mobile device, or if you re-size your browser window and reduce the width below 650 pixels, the application will assume you are using a tablet or mobile device and will change the display layout to accommodate this.

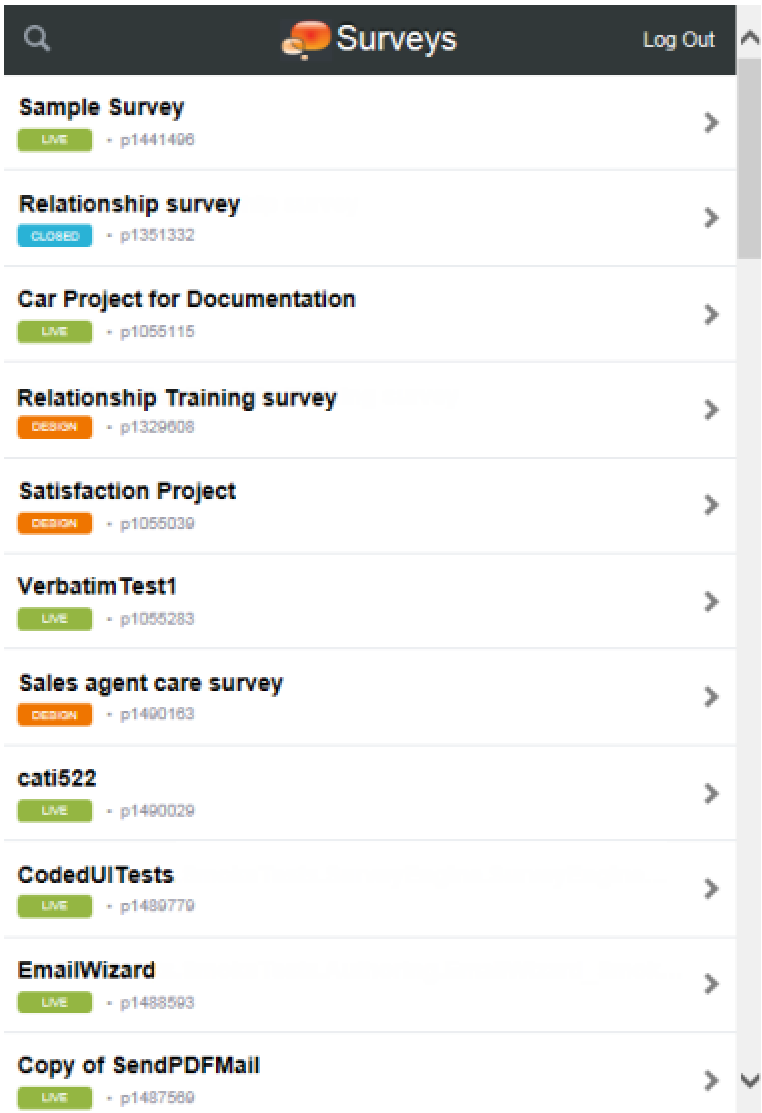


Figure 24 The survey list on a small screen

- Note that this smaller screen layout has reduced functionality as it is not intended to be used to create surveys; only to view important data.
- A search field is available at the top of the list to enable you to more easily find the survey you wish to work with if the list holds a large number of surveys.
- Tap/click the **>** icon for a survey to open the Overview page for that survey.

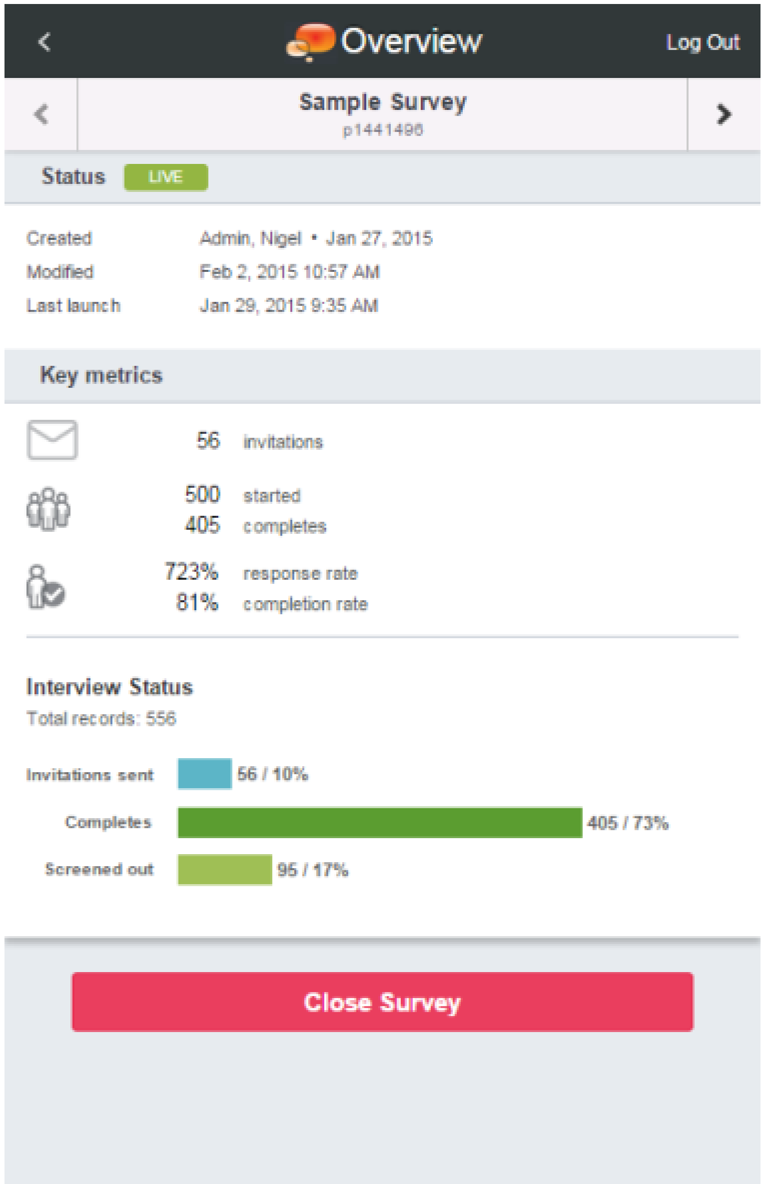


Figure 25 The Overview page on a small screen

- When in the Overlay page, tap/click the **<** and **>** buttons in the survey name bar to move to the Overview page for previous and next survey in the list respectively.
- Tap/click the **Close Survey** button to change the survey status to Closed.
- Tap/click the **<** button at the left end of the Overlay logo bar to return to the Surveys List.

2.5. The Recent Surveys Dropdown Menu

The **Recent Surveys** drop-down in the Confirmit toolbar is always available and allows you to quickly find surveys you have recently accessed, to list all the surveys you have access to, and to create new surveys.

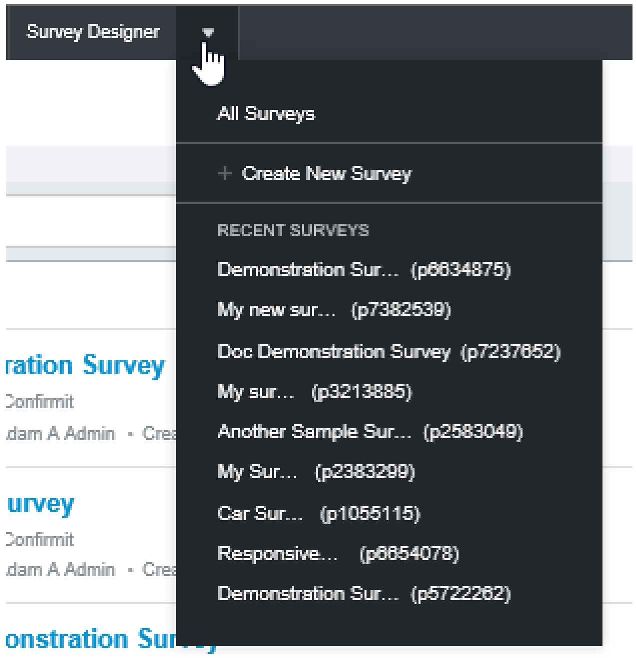


Figure 26 Example of the Recent Surveys menu

2.6. Importing a Survey Definition

You can export (see Exporting a Survey Definition on page 51 for more information) and import surveys from one system to another through XML. This allows you to transfer survey definitions from one Confirmit server to another. To import a survey definition from your computer:

1. In the Surveys list, click the down-arrow beside the **New Survey** button and select **Import Survey Definition**.

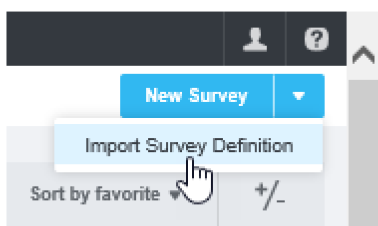


Figure 27 Selecting Import Survey Definition

The Import Survey Definition overlay opens.

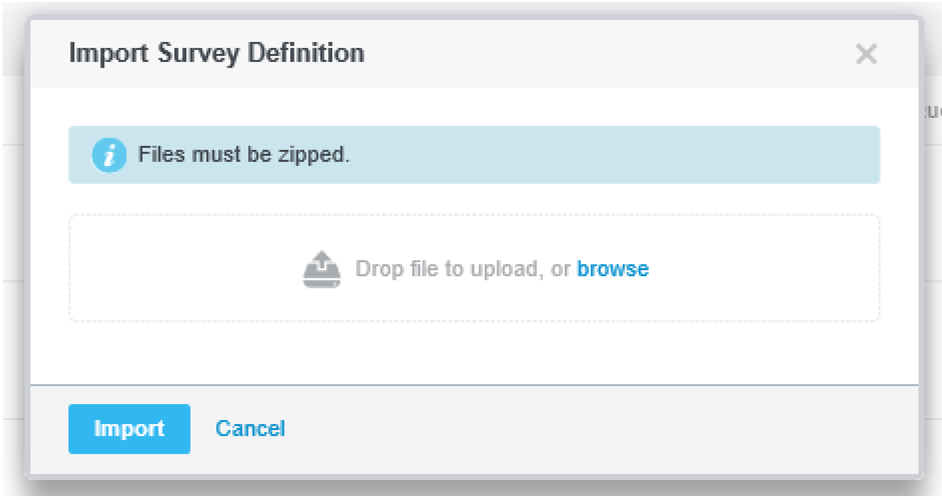


Figure 28 The Import Survey Definition overlay

2. Drag the required survey definition file from your file explorer and drop it into the field in the center of the overlay, or click **Browse** to open a standard file selection window, browse to the file and select it.

   The selected file is placed into the field.

Note: The definition file must be zipped.

3. Click **Import** to import it.

   On completion, the overlay indicates a successful import or notifies you if it encountered a problem.

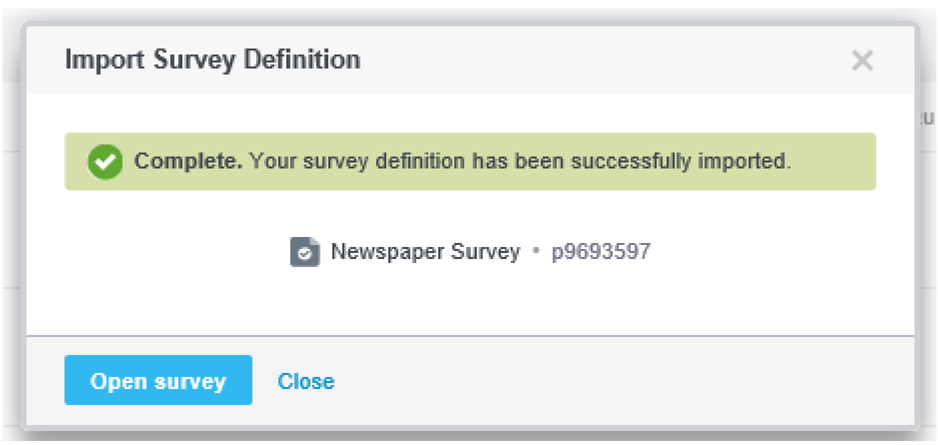


Figure 29 A successful import

4. Click **Open survey** to go to open the survey for editing, or **Close** to close the overlay and return to the Surveys list.

Note: The import functionality allows you to transfer the survey definition; it does not transfer survey data.

3. The Overview Page

When you click on a blue survey name link in the Survey List, the Overview page for that survey opens. The Key Metrics tab will be open by default; all the tabs can be toggled open or closed by clicking the arrow icon beside the tab header.

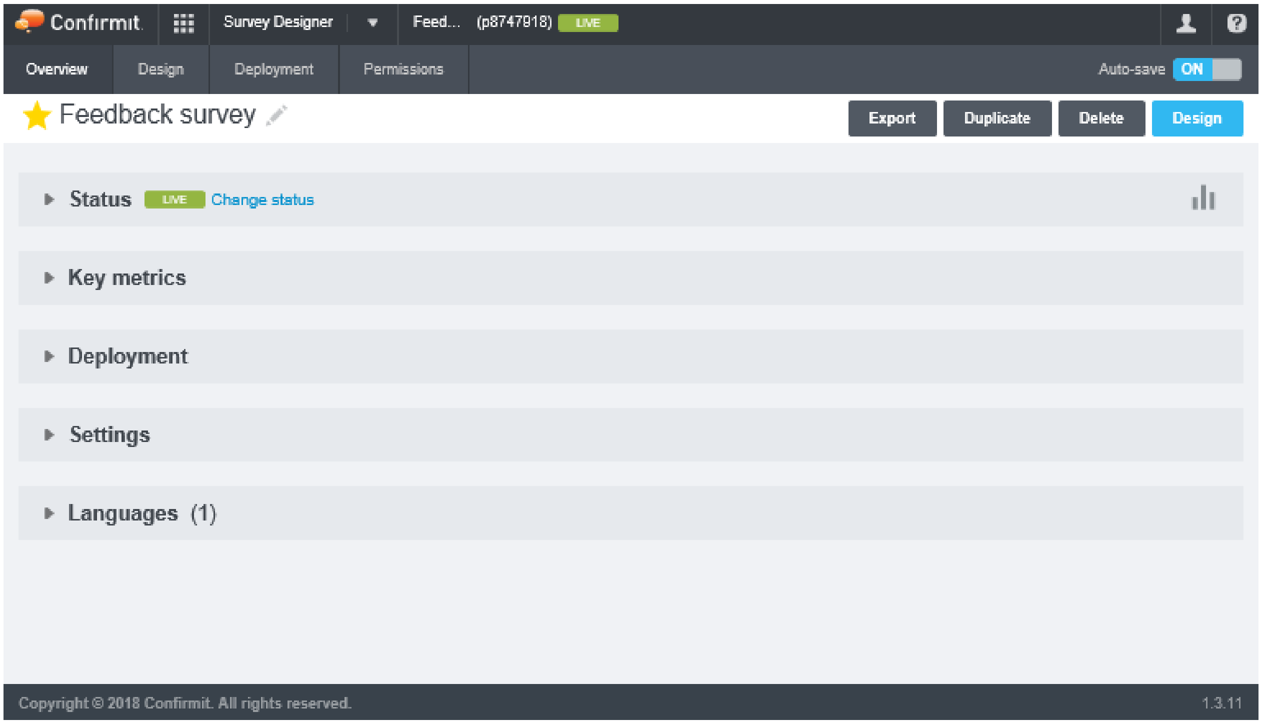


Figure 30 Example of the Overview page for a survey

- If you will be returning frequently to a survey to build or edit it and want easy access, you can designate it as a "Favorite". In the Overview page, click on the yellow star beside the survey name to fill it with color, then when you are in the Surveys List page you can select **Sort by favorite** (see Sorting the List on page 17 for more information) to bring your favorite surveys to the top of the list. Note that you can also designate surveys as "Favorite" from the Surveys List page.
- To change the name of the survey, click the **Edit** icon beside the survey name and type in the new name.
- **Auto-save -** (default On) when you make changes to the survey, the changes will be saved automatically after a few seconds. Note that if you switch this off you must then save all changes manually (see Saving Changes on page 12 for more information).
- **Export -** allows you to export the survey definition to another system (see Exporting a Survey Definition on page 51 for more information).
- **Duplicate -** creates a duplicate of the current survey (see Duplicating a Survey on page 50 for more information).
- **Delete -** deletes the current survey (see Deleting a Survey on page 51 for more information).
- **Design -** opens the Survey Design page.
- **Status area -** indicates the current status of the survey (see The Status Area on page 23 for more information).

- **Key Metrics area -** displays the important survey data (see The Key Metrics Area on page 26 for more information).
- **Deployment area -** displays key deployment details (see The Deployment Area on page 28 for more information).
- **Settings area -** allows you to view and edit the survey settings (see The Settings Area on page 29 for more information).
- **Languages area -** allows you to view and edit the survey's language settings and links (see The Languages Area on page 45 for more information).

3.1. The Status Area

The Status tab shows the general information about the survey; its ID number, when it was last launched, when and by whom it was created and modified, and any description that has been included. Here also is the link to the designer log, where all changes to the survey are registered and can be undone if required (see The Designer Log on page 24 for more information). The current status of the survey is displayed as an icon below the survey ID in the Survey List, and in the status tab towards the top of the Overview page.

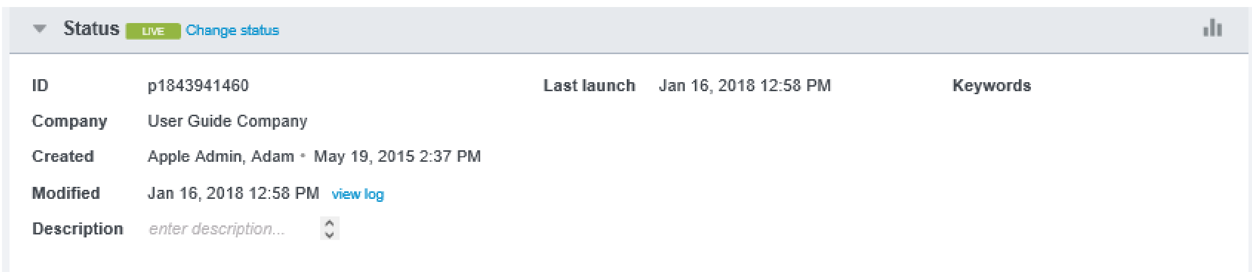


Figure 31 The status icon on the Overview page Status tab

The survey can have the following status:

- **Design -** orange icon, applied while the survey is being built until the survey is launched.
- **Live -** green icon, once the survey has been launched and until it is changed to Closed.
- **Live, Maintenance mode -** select this mode to temporarily close the survey to respondents and display a "Survey under maintenance" message. Uncheck the box or re-launch the survey to reset the survey to Live.
- **Closed -** blue icon. The survey is closed. Respondents will not be able to enter the survey, and a message will be displayed to them if they attempt to do so.

To change the survey status manually, click the **Change Status** link beside the status icon (see Changing the Survey Status on page 23 for more information).

To view the Instant Analytics report for the survey, click the icon towards the right end of the Status area title bar.

3.1.1. Changing the Survey Status

When the survey has the status Live or Closed you can change the status manually. To change the status:

1. Click **Change status**.

   The Survey Status overlay appears.

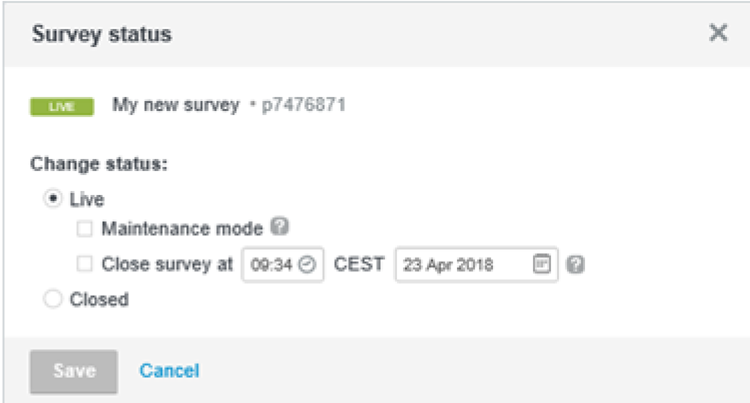


Figure 32 The Survey Status overlay

2. Select the required status and click **Save**.

   The overlay closes and you are returned to the **Overlay** page, and the status icon is updated.

You can also set a date and time for when the survey is to close. Check the Close survey at... box, set the date and time, then click **Save**. Note that the initial values are the current time one month ahead. The time zone is your local time as detected from your browser.

3.1.2. The Designer Log

The Designer Log page lists all the tasks and changes that have been performed on the survey since it was created. These will include for example when the survey is launched or relaunched, any questions added to the survey or deleted, any changes made to properties, when the survey is exported etc.

When in the Survey List, click the expand icon beside the survey name (ringed in the figure), or when you are in the survey go to the Overview page and expand the Status tab, to show the **View log** link (arrowed).

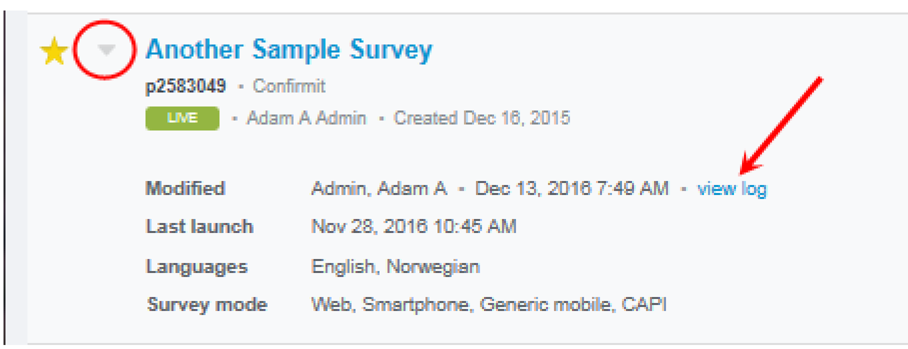


Figure 33 The expand icon and the log link

Click **View log** to open the Designer Log page.

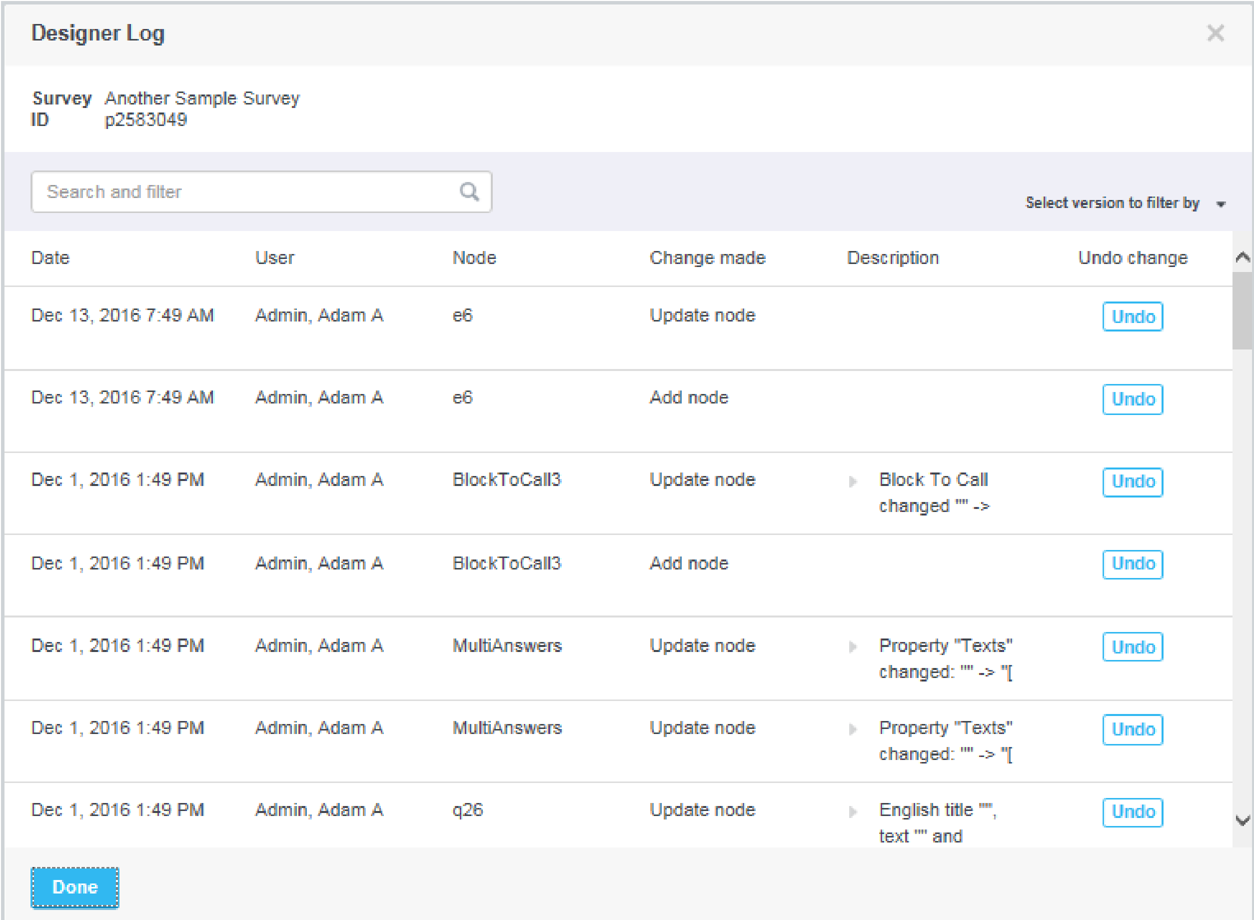


Figure 34 Example of part of the designer log for a survey

Changes to the survey such as additions, deletions and changes to parameters, can be undone (see Undoing a Change on page 25 for more information).

3.1.2.1. Undoing a Change

Changes to the survey such as additions, deletions and changes to parameters, can be undone. Any entries in the log that can be undone are listed with an **Undo** button.

1. Click **Undo**.

   The Undo Change overlay appears.

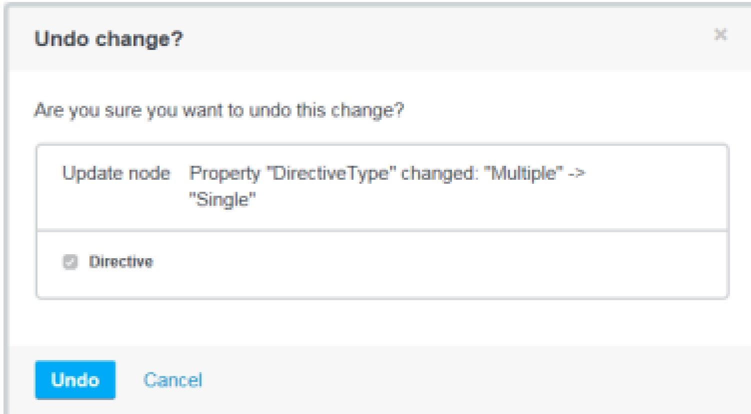


Figure 35 The Undo Change overlay

2. Click **Undo** to confirm the procedure, or **Cancel** to close the overlay without undoing the change.

The undo task will appear in the log with its own **Undo** button. So if you undo a change by mistake or change your mind, you can redo the change.

3.2. The Key Metrics Area

Note: Key metrics data is available only for surveys launched after the functionality described in this document was released. If no key metrics data is displayed for a survey then you will need to re-launch the survey.

On the Overview page, click the expansion button beside Key Metrics to expand the Key Metrics area.

At the top of this area is the interview status area, with the trends, counts for the respondents, invitations sent and responses, and response rates.

Figure 36 Example of the Key Metrics area

The metrics displayed here include:

- The date the last response was received.
- The total number of respondents who have replied.
- The number of email invitations sent out.
- The number of interviews started.
- The number of interviews completed.
- The response rate.
- The completion rate.
- The total number of records (displayed within the chart area).

Note that the Total Records count is displayed as a number, not as bar, as this would make all the other bars very small in comparison.

Below the status chart is a table showing the channels used to collect the information (for example mobile, desktop etc.) and the statistics for each channel.

	Total	Collection channel	
		Total	Desktop
Complete	17 100.0%	17 100.0%	17 100.0%
Incomplete	6 100.0%	6 100.0%	6 100.0%
Total started	23 100.0%	23 100.0%	23 100.0%

Figure 37 Example of the Collection Channel statistics table

Towards the bottom of the tab is the Drop-off Questions chart. This shows the top three questions at which respondents who delivered incomplete surveys left the survey.

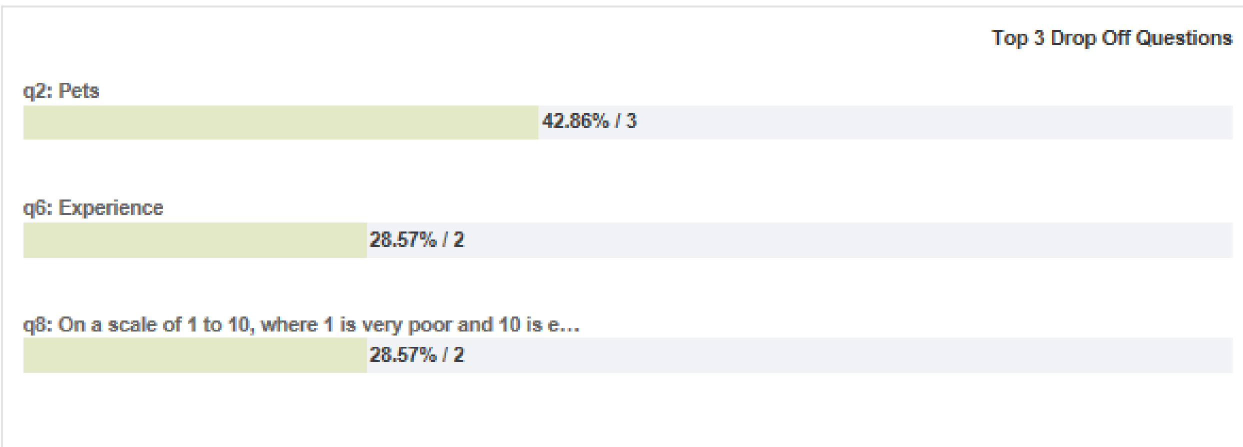


Figure 38 Example of the Drop Off Questions chart

In the event the drop-off question has a title this will be displayed, otherwise the question text will be used.

3.3. The Deployment Area

The Deployment area presents key deployment details, such as the access mode selected for the survey and the various links and URLs that are created depending on the settings made in the Access area when launching the survey.

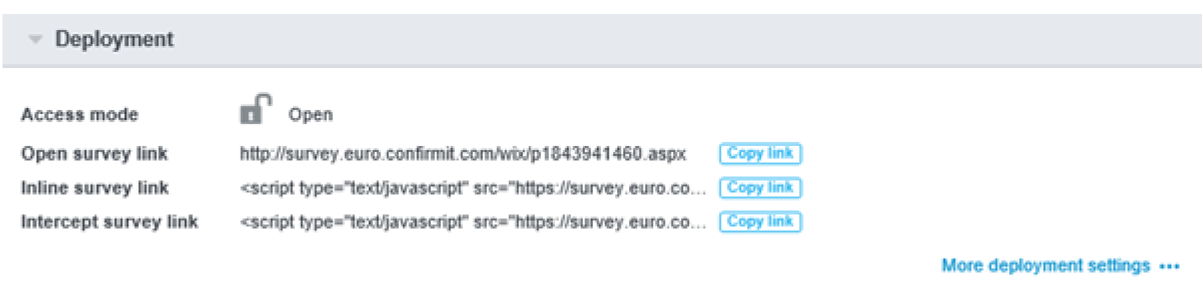


Figure 39 Example of the Deployment area for a survey

The details are displayed in this area after the survey is launched. Note that this information is also available in the Details area of the Deployment tab (see The Details Area on page 205 for more information). Click **More deployment settings** to open the Details area.

3.4. The Settings Area

When you click on a survey in the Survey list, the survey opens at the Overview page. This area allows you to set and change the survey mode(s), the layout used, and a number of other options. Note that the same settings will be available to you if you open the Settings tab from the Survey Designer (see The Design Tab on page 53 for more information).

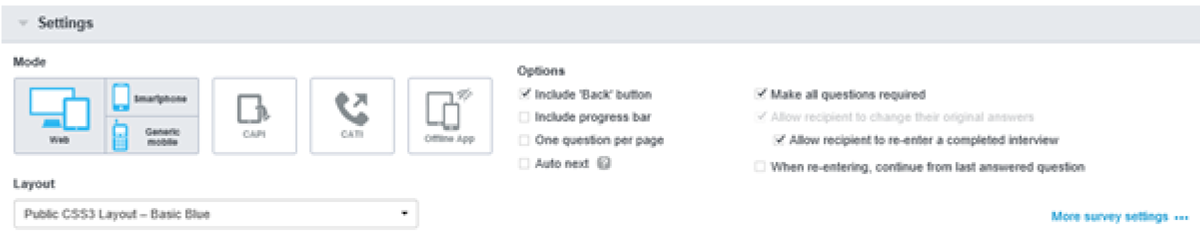


Figure 40 The Settings area

Mode and key options - click on a mode to toggle it on and off. Blue is selected, gray is deselected.

When you select the Web Survey mode, the Smartphone and Generic mobile sub-options become available. If you then select the Smartphone option, touch rendering will be activated for the survey. Note that you can switch off the touch rendering functionality for individual pages in the survey by going to the page editor for the survey page in question.

If you select either or both of the Smartphone and Generic mobile sub-options then additional settings become available under the More settings link (see Mobile on page 33 for more information).

- **CAPI -** Computer Assisted Personal Interviewing - select if the survey is to be rendered in the CAPI/Kiosk mode (see CAPI - In-Person/Kiosk on page 36 for more information) . Refer also to the separate CAPI/Kiosk User Guide for further details.
- **CATI -** Computer Assisted Telephone Interviewing - select if the survey is to be used for telephone interviewing (see CATI - Telephone on page 37 for more information). This also makes the Telephony item available (see The Telephony Node on page 92 for more information). Refer also to the separate CATI User Guide for further details.
- **Offline App -** select to allow respondents to complete Confirmit Horizons-created surveys whilst offline (see The Offline App on page 39 for more information).

Options - check the desired options. These are:

- **Include back button -** the **Back** button allows the respondent to step backwards in the survey and review/modify previous answers. This option is selected as default. While this box is selected, it also forces the Allow recipient to change their original answer option described below to selected.
- **Include progress bar -** check this option to include a progress bar on the survey pages. This bar shows the respondent how much of the survey is remaining (as a percentage). The percentage calculation is based on the entire survey, i.e. all questions in the survey. This means that if you have conditions in the survey, the progress bar will jump depending on the number of questions that were bypassed due to the previous answer given by the respondent. The progress bar can therefore sometimes be misleading to respondents. Progress bar start and end points can be set by directives (see The Directive Node on page 88 for more information).
- **One question per page -** forces the generator to have a new page in the survey for each question.
- **Auto next -** This feature will automatically take the respondent to the next page in a survey when all the questions on a page have been completed. The feature will only be applied on pages consisting of single questions (a grid is a collection of single questions, so the feature will be active for grid questions).

- **Make all questions required** - check this if you wish to ensure that the respondent must provide an answer to all the questions in the survey. He/she will not then be able to progress to the next question until an answer is provided for the current.
- **Allow recipient to change their original answers -** this option controls the way in which the survey handles re-entry to a survey page. Re-entry to restricted access surveys can occur if a respondent uses the browser's **Back** button, or if he/she returns to the survey using the URL received in the email requesting participation in the survey. If the survey is to be “one-shot”, then do not select this option. The survey will then behave as follows:
  - If a respondent has completed the survey and attempts to return to it, then the survey program displays a “Survey already completed” message.
  - If the respondent returns to a partially completed survey, then a “You have already completed parts of the survey. Press OK to continue” message is displayed.
  - If it is detected that the browser's back-button has been used, then a “Previous answers may not be modified. Press OK to continue” message is displayed.
- **Allow respondents to re-enter a completed interview -** this option applies to restricted access surveys (login page and cryptic link), and it controls whether the respondents can re-enter the survey after they have completed it.
- **When re-entering, continue from last answered question -** if a respondent leaves a survey incomplete for any reason and you wish to allow them to reenter later, check this box to take him/her directly to the next un-answered question.

More survey settings - click this link to open a page with more options and settings (see More Survey Settings on page 30 for more information). Note that some of the settings on this page will be available depending on options selected previously.

3.5. More Survey Settings

Click the link in the lower-right corner of the Settings area to access additional settings. These settings are also accessible through the Design tab (see The Design Tab on page 53 for more information) Settings page. Note that some areas will only be visible if appropriate options are selected in the Settings/General area. The areas are:

- The Options area (see Options on page 30 for more information).
- The Web area (see Web on page 32 for more information).
- The Mobile area (see Mobile on page 33 for more information).
- The CAPI... area (see CAPI - In-Person/Kiosk on page 36 for more information).
- The CATI... area (see CATI - Telephone on page 37 for more information).
- The Offline App area (see The Offline App on page 39 for more information).
- The Validation & XSS area (see Validation & XSS on page 43 for more information).
- The Layout area (see Layout on page 44 for more information).

3.5.1. Options

This section contains.

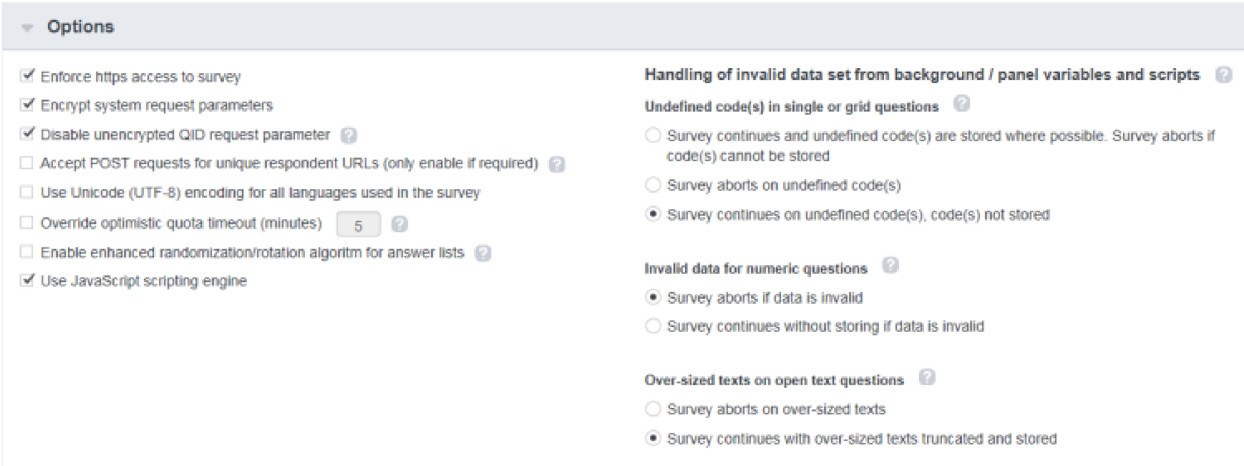


Figure 41 The Options settings

- **Enforce HTTPS Access to Survey -** check this box to enforce HTTPS use by people accessing the survey

Important
If HTTPS is required, then any references to HTTP anywhere in your survey, including URLs to illustrations or links, in HTML styles, external style-sheets or scripts, will cause a warning to be displayed in most browsers. This warning may occur on every page of the survey and, depending on the user's response to the warning, the survey may not be displayed correctly. Faced with this, many respondents will abort the survey!

However this is easy to avoid; ensure that all absolute URLs start with "https", and you can use relative URLs if the targets are stored in the File Library (refer to the Confirmit Professional Authoring User Guide for more information). If you test the survey with a live link in a separate browser window and you do not get any messages, then neither will your respondents.

- **Encrypt System Request Parameters -** this property increases the security of the system. Leave this box checked to encrypt system request parameters such as:

  r, s, __state, __loop, __seqno and __version

  These will not then be shown in clear text, but encrypted in a __sid__ parameter. This applies to both hidden question fields and URL parameters. Respondent links will then take the form:

/confirm/wix/test_p0003502.aspx?__sid__=KKCCKburQTJA0nxoy3zppzwMNq7TPEZCTqPH8EzXazrpu2_FkhnkHlS-bKIWXZM_0

  If the parameters (r, s, ...) are transmitted in clear text when this feature is turned on, the parameter values will be ignored. The Survey Link will also be encrypted (go to The Survey Link Column for more information). Attempting to manipulate the __sid__ value will result in an internal error page being shown with an http status code. The default value for new surveys is "checked".

Note: You are strongly recommended to leave this property box checked.

- **Disable unencrypted QID request parameter** - prevents respondents from tampering with the survey URLs to skip to specific questions (disabled by default in new surveys).
- **Accept POST requests for unique respondents -** when this option is checked, attempts to initiate interviews using HTTP POST requests for unique respondent URLs will be permitted. If this option is not checked POST requests cannot be used to initiate the interview. HTTP GET requests can always be used to initiate interviews. This setting should only be checked in scenarios when POST requests are used.
- **Use Unicode (UTF-8) encoding for all languages used in the survey -** enforces Unicode (UTF8) encoding when the survey is rendered, irrespective of which language is being used in the survey. This will avoid problems such as occur when the respondent enters characters not expected in the current language/codepage into an answer, which is then saved incorrectly.

- **Override optimistic quota timeout (mins) -** this is the timeout setting to be used when using Optimistic Quotas. In the event a respondent makes no changes to the survey for this timeout period, then the respondent is assumed to have left the survey uncompleted and the Optimistic Quota is decremented for this respondent (go to Optimistic Quotas for more information). The default value for this timeout is 5 minutes, the minimum value allowed is 1 minute.
- **Enable enhanced randomization... -** When questions in the survey are set to use answer list randomization/rotation, the regular algorithm used to randomize the lists results in 'pseudo-randomization'. With this setting enabled, the algorithm will produce lists that are more naturally randomized. Note that questions containing predefined lists will have the same list order for every time the list is used by the same respondent ID, but questions with the same answer list but not based on a predefined list will not necessarily be in the same order. If a respondent completes the survey over several interviewing sessions, the answers will be displayed in the same order for that respondent, irrespective of whether the questions use predefined answer lists. With the setting disabled, the answer list randomization/rotation is determined based on the responseID and the number of answers in the answer list.
- **Use JavaScript scripting engine -** this is a survey-level setting which must be enabled to allow use of the JavaScript engine. When this setting is enabled JavaScript can operate in all channels (CAWI, CAPI, CATI) and all scripts must be in JavaScript, not JScript.NET. All script input areas (script nodes, masking, validation etc...) then display a text box stating that the JavaScript engine is in use.
- **Handling of invalid data set from background / panel variables and scripts -** the settings control how invalid data is handled when being set as background or panel variables or when values are set from scripts. The options allow you to control what happens if such a scenario arises for single, grid, numeric or open text questions. The result will be that the data is either committed or not, and that the survey either continues or aborts. If this scenario occurs, an email will be sent to the person responsible for the survey informing them about the issue. If the survey is aborted due to the invalid data, they will be sent an appropriate error via email.
  - **Undefined codes in single or grid questions -** "Undefined codes" are codes that do not exist in the answer list for a single question, grid question or a single inside of a 3D grid question. Select the desired outcome in the event undefined codes are found.
  - **Invalid data for numeric questions -** "Invalid data" refers to non-numeric values or values outside of the total digits/decimal places restrictions. Select the desired outcome in the event invalid data is found.
  - **Oversized texts on open text questions -** "Over-sized texts" refer to texts that are longer than the Open Text field width settings. Select the desired outcome in the event oversized texts are found.

3.5.2. Web

In the Web options area you define how the browser is to react, and other display options for the survey.

- **Override browser back button... -** causes the browser's Back button to simulate a click of the Back-button in the survey.
- **Set focus to first control on page -** ignores all the Windows toolbar controls and sets the focus to the first Confirmit control on a page to avoid the respondent having to tab through browser menus etc.
- **Enable short URLs -** to avoid texts that are too long, users who wish to send survey invitations and reminders through SMS need shorter survey URLs than the standard respondent URLs used by Confirmit. When this property is enabled, the respondent URLs will be on the short format. Note that short URLs expire after six months of inactivity; either six months after a link was last accessed, or if never accessed, six months after the link was created.

Note: Due to the shorter key, short URLs are inherently less secure than full encrypted URLs. The Short URL functionality is intended to be used when there are restrictions on the length of the message, as in for example SMS messages. In all other cases you are recommended to use regular encrypted URLs.

- **Prevent survey page being displayed within a frame -** when this option is checked, if the survey page is placed within a frame then it will not appear and it will not be possible to start the survey. Surveys with this enabled will not be displayed without JavaScript being enabled in the browser. This is recommended for security reasons to prevent click-jacking.

- **Include a link that, upon re-entry… -** this feature applies to Restricted Surveys with the Generate Back Button option selected, and allows respondents to continue where they left off. Use it in combination with the "Continue link" visual component in Theme in Survey Layout. If the respondent returns to a partially completed interview, he/she will be brought to the very beginning of the questionnaire and, if necessary, can be allowed to modify his/her answers. If the respondent does not want to modify previously given answers, he/she will be able to click the link to be taken to the point at which they left off, and can then continue taking the survey from there. Use this in combination with the "Continue link" visual component in Theme in Survey Layout.

3.5.3. Mobile

Under Mode and key options (see The Settings Area on page 29 for more information), when either or both of the Smartphone and Generic mobile options are selected, the Mobile settings are available under the More settings link. Two tabs of parameters allow you to set colors, fonts, image URLs, and the general layout for the mobile presentation, and a preview area presents an example of what the respondent will see when the survey uses the settings you have chosen.

3.5.3.1. Colors, Fonts And Images Tab

The properties and settings on this tab allow you to set the screen colors, text fonts and URLs for images, to be displayed on mobile devices. Settings made here are demonstrated in the example in the Mobile preview area (see Mobile Preview on page 35 for more information).

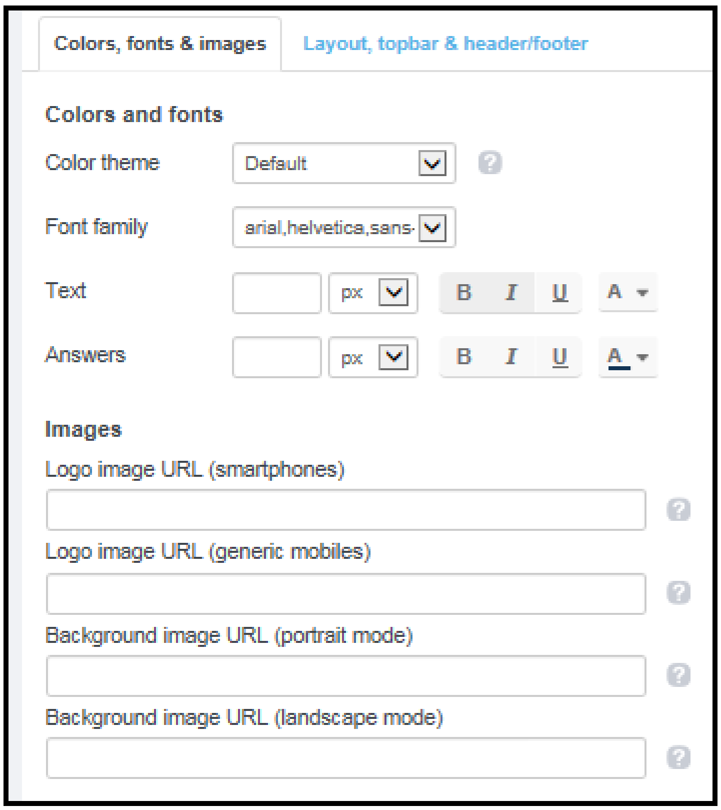


Figure 42 The Colors, fonts and images tab

- **Color theme -** the theme controls the background color, color and style used for navigation buttons, and the style used for radio buttons and check boxes. Eight themes are available. If you wish to use a background image in the iPhone rendering, the most appropriate theme to use is the Image Background theme, then specify which images are to be used in the iPhone and Android tab. Note that themes cannot be customized, and you cannot create your own themes.
- **Font family -** select the font family you wish to use for the text displayed on the mobile device

- **Text -** type in or select the font size, the size unit (pixels, em or %) to be used, whether or not bold, italic or underline styles are to be used, and the text color, for the texts (questions, information etc.) displayed on the mobile device. The text color is defined as a hexadecimal value.
- **Answers -** type in or select the font size, the size unit (pixels, em or %) to be used, whether or not bold, italic or underline styles are to be used, and the text color, for the answers displayed on the mobile device. The text color is defined as a hexadecimal value.
- **Logo image URL -** allows you to present a logo in the device's top bar. The logo file can be located anywhere, but you are recommended to store it in a location where it will be accessible for the lifetime of the survey. Note that the Show top bar option in the Layout, topbar and header/footer tab (see Layout, Topbar and Header/Footer Tab on page 34 for more information) must be checked such that there is a top bar for the logo to be presented in. You can use different images for Smartphones and generic mobiles.
- **Background image URL -** here you can select a background image to be presented. For themes other than “Image Background”, the image will only be visible below the bottom of the survey question area. When the “Image Background” theme is used, the image will be visible underneath the survey text (the transparency of the survey page can be adjusted). Note that you must specify the images that are to be used for landscape and portrait presentations.

3.5.3.2. Layout, Topbar and Header/Footer Tab

The properties and settings on this tab allow you to display a progress bar, specify how questions are to be presented, show or hide a topbar and specify what is to be in the topbar. Settings made here are demonstrated in the example in the Mobile preview area (see Mobile Preview on page 35 for more information).

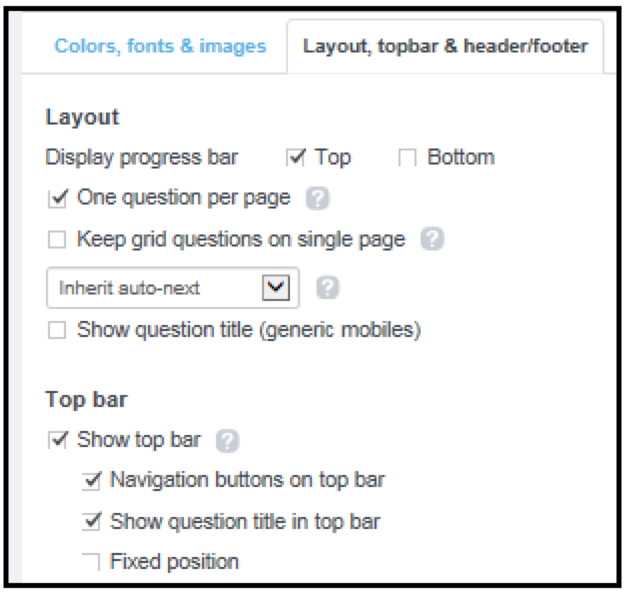


Figure 43 The Layout, topbar and header/footer tab

- **Display progress bar -** select whether you wish the progress bar to be displayed, and if so, whether you want it at the top and/or the bottom of the display.
- **One Question Per Page -** if this is checked, then in the event a survey page has more than one question on it, the page will be divided up such that only one question is presented at a time on the mobile device. Be aware that the page division is performed within the mobile device, and the answers to the questions are only submitted back to the server once all the questions on the original survey page have been answered. So if the respondent leaves the survey before providing the answers for all the questions on the survey page, no answers will be registered for any of the questions on that page. Note that questions in star rating, slider or drop-down grids and questions using answer buttons are kept together on one page irrespective of this setting.

- **Keep grid questions on single page -** check this box to prevent the "One Question Per Page" property from displaying normal appearance grid questions as a series of single questions on separate pages.
- **Auto next -** controls the automatic page transition functionality for respondents using mobile rendering. The options are:
  - **Inherit –** the page transition will conform to the survey setting "Auto-next (proceed to next page automatically when possible)" in the layout tab. If "Auto next…" is enabled, mobile rendering will then also automatically move to the next question.
  - **On –** the next page is automatically displayed when the current question is answered.
  - **Off –** the next page is not displayed automatically; the respondent must touch "Next" to move to the next question.

  When either On or Off is selected, the "Auto-next (proceed to next page automatically when possible)" survey setting does not apply to mobile rendering.
- **Show top bar -** check to display a top bar above the questions and answers on the mobile display. If this option is not checked, then the options under this will not be available, and you will not be able to display a logo.
  - **Navigation buttons on top bar -** if you have selected to display a top bar, then you can include the navigation buttons within it.
  - **Show question title in top bar -** if you have selected to display a top bar, then you can display the title of the current question on it. Note that you cannot have both a logo and the question title in the top bar simultaneously; if a logo URL is selected then this Show questions... option is inactive.
  - **Fixed position -** fixes the top bar at the top of the device's display such that it remains visible when you scroll down the page.

3.5.3.3. Mobile Preview

This area shows an example of what the respondent will see on their mobile device when the survey uses the current color and layout settings. The preview is updated immediately as you change the settings. If you have selected both the Smartphone and Generic mobile options in the in the Mode and key options area (see The Settings Area on page 29 for more information) then you can select between the two layouts, and you can select between the question in the survey to see how the different questions will look when viewed on a mobile device.

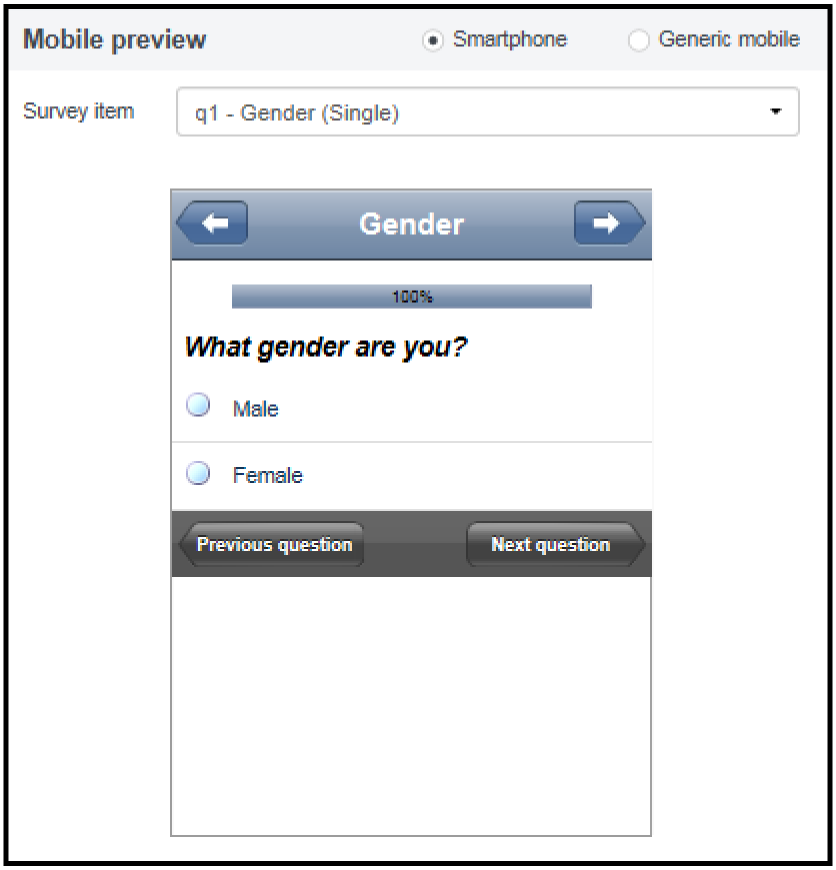


Figure 44 Example of the Mobile preview area

3.5.4. CAPI - In-Person/Kiosk

Under Mode and key options (see The Settings Area on page 29 for more information), when the CAPI option is selected, the CAPI - In-person/Kiosk settings are available under the More settings link.

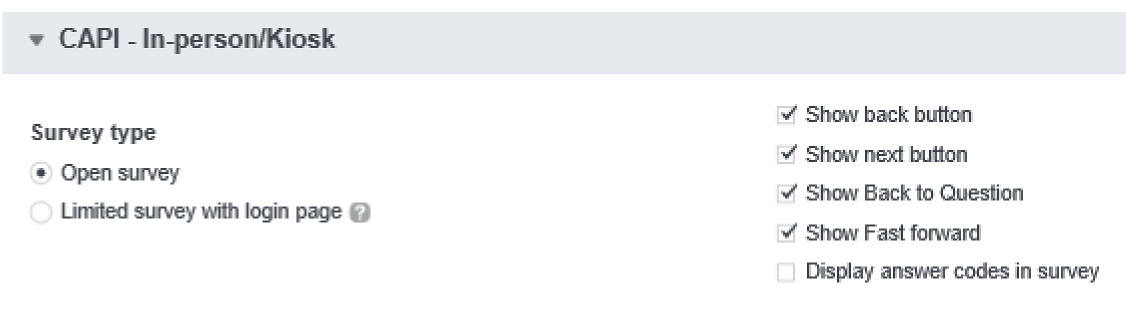


Figure 45 The CAPI - In-person/Kiosk settings

- **Open survey -** the survey will be available to anyone using the pc. This option could be used for example for a customer satisfaction survey in a hotel foyer.
- **Limited survey with login page -** the respondent must log in using a UserID and password. If this option is selected then the survey will require a respondent list including UserID and Password fields to be uploaded.

The following options allow designers to control which action buttons are to appear when interviewing in the CAPI App. These will control the buttons in the CAPI app only, not the CAPI console. Note that these settings are not available from Professional Authoring.

- **Show back button -** adds a **Back** button to each page of the survey so respondents can go back to previous pages and change their answers.
- **Show next button -** adds a **Next** button to each page of the survey so respondents can move forwards through the survey, for example to return to the "current" page after using the **Back** button.
- **Show Back to question** - adds a **Back to question** button to each page of the survey so respondents can return to the "current" page after for example using the **Back** button.
- **Show Fast forward -** adds a **Fast forward** button to the toolbar. This button allows the respondent to jump forwards through the survey to the next unanswered question if, for example, they have used the **Back** button to change an answer to a question earlier in the survey and now wish to continue where they left off.
- **Display answer codes in survey -** check to include the codes beside the answer labels on the question pages in the survey.

3.5.5. CATI - Telephone

CATI is the abbreviation for Computer Assisted Telephone Interviewing. This is an integrated computer system for data collection that manages all the day-to-day activities of a telephone interviewing call center.

Under Mode and key options (see The Settings Area on page 29 for more information), when the CATI option is selected, the CATI - Telephone settings are available under the More settings link.

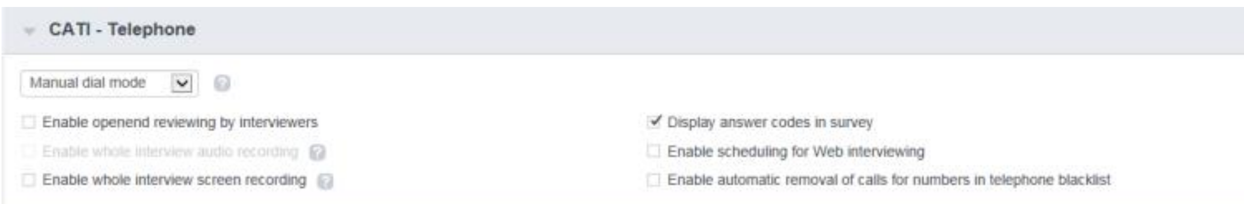


Figure 46 The CATI - Telephone settings

- The Dial mode is the method used to dial the telephone numbers. The mode selected will depend on the dialing system used by the call canter that will be using the survey. The options are:
  - **Manual -** the interviewer is allocated a telephone number by the CATI system, and manually dials the number on his/her telephone.
  - **Preview -** the CATI system presents the telephone number on the interviewer's display, and the interviewer clicks, for example, "OK" when he/she is ready to start the interview. The CATI system then dials the number and connects the line to the interviewer's telephone.
  - **Automatic -** the CATI system dials the next number in its sample list automatically as soon as it registers that the interviewer is finished with the previous interview.
  - **Predictive -** when the dialer dials a telephone number, in a large proportion of cases the line may be engaged, the prospective respondent may not answer the phone, the number may be a fax machine etc. If the dialer were to dial a number and wait for a reply before trying the next, a lot of time will be wasted. The dialer will therefore dial several numbers simultaneously and pass the first answered line to the first available interviewer. This can increase productivity for the call center, but can result in a lot of prospective respondents receiving "nuisance calls" - where their phone rings, they answer it but there is no-one on the other end. Careful adjustment of the dialing system is therefore necessary to keep the percentage of nuisance calls to a minimum. A large number of dialing systems are available on the market. For further information on the dialer your CATI system is using, refer to the technical information provided by your dialer supplier or the internal team responsible for your CATI/dialer infrastructure.

Note: Changes to the Dial mode are only effective after the survey is re-launched, and will only be applied to the dialer once the survey is closed/shutdown and then re-opened in the CATI Supervisor.

- **Enable open-end reviewing by interviewers -** when a survey contains Open Text fields, after the interview is completed the interviewer may need to go back through the questions and review/edit the text he/she has written. When this box is checked, all Open Text fields in the survey will be made available on the interviewer's display after the interview is completed.
- **Enable whole interview audio recording -** if a dialer is used for the call, when this setting is enabled the audio for all interviews carried out in this survey will be recorded and available for playback from the call management dialog. If screen recording is also enabled, the interviews can be replayed with both screen and voice from the 'Recorded Interviews' tab in the CATI supervisor.
- **Enable whole interview screen recording -** (default - not selected) if a dialer is used for the call, when this setting is enabled, the screen for all interviews carried out in this survey will be recorded and available to view from the 'Recorded Interviews' tab in the CATI supervisor. If audio recording is also enabled, the interviews can be replayed with both screen and voice from the 'Recorded Interviews' tab in the CATI supervisor.
- **Display answer codes in survey -** CATI interviewing supports the use of the keyboard for selecting answer options. Check this box if you wish the interviewers to be able to see the codes. The interviewer can then type the code value or text into the field and press Enter to "select" the answer option.
- **Enable scheduling for Web interviewing -** if this box is checked, if a web interview finishes with a predefined status then the CATI scheduling rules will be invoked. Typical scenarios where this may be invoked are as follows:
  - A Multimode interview that is started in CATI but completed via Web because when the email is sent to the respondent during the CATI interview an appointment is created for some point in the future (for example 1 week). If the respondent later completes the survey via the Web, the appointment is removed. If they do not complete it then the appointment will remain valid and will need to be followed up by the interviewer.
  - A Web survey that has an option to have an interviewer call the respondent back. After the respondent requests this, the system will create a call for that respondent in its call queue. This is done via the scheduling rules.
- **Enable automatic removal of calls from numbers in telephone blacklist -** if this box is checked, if the company maintains a telephone blacklist (numbers for respondents who have indicated they do not wish to be contacted), then any numbers on the blacklist will be removed automatically from the calling list.

Note: For CATI surveys, you can adjust the user interface of a test version of the survey so it is easily distinguishable from the production version (see Creating a Test Version of a CATI Survey on page 38 for more information).

3.5.5.1. Creating a Test Version of a CATI Survey

You may wish to create a duplicate version of a CATI survey so you can test it or practice working on it before you start to collect real data in the live production survey. In these cases a common approach is to add words such as ‘Test’ or ‘Live’ into the name of the survey. However both the test and the production versions will look almost identical, so a potential danger is that the interviewer may accidentally enter test data into the production survey or production data into the test version. To help avoid possible confusion, you can create a much more visible distinction to the CATI interviewer interface for surveys deployed as test surveys. By simply including **#Test** at the end of the survey name for a CATI survey, the system will automatically adjust the appearance of the interviewer's display by applying a yellow background to the toolbars at the top and bottom of the screen. In addition, the words **TEST MODE** will be included in the console window title, and a flashing **! Test Mode** symbol will be included in the toolbar.

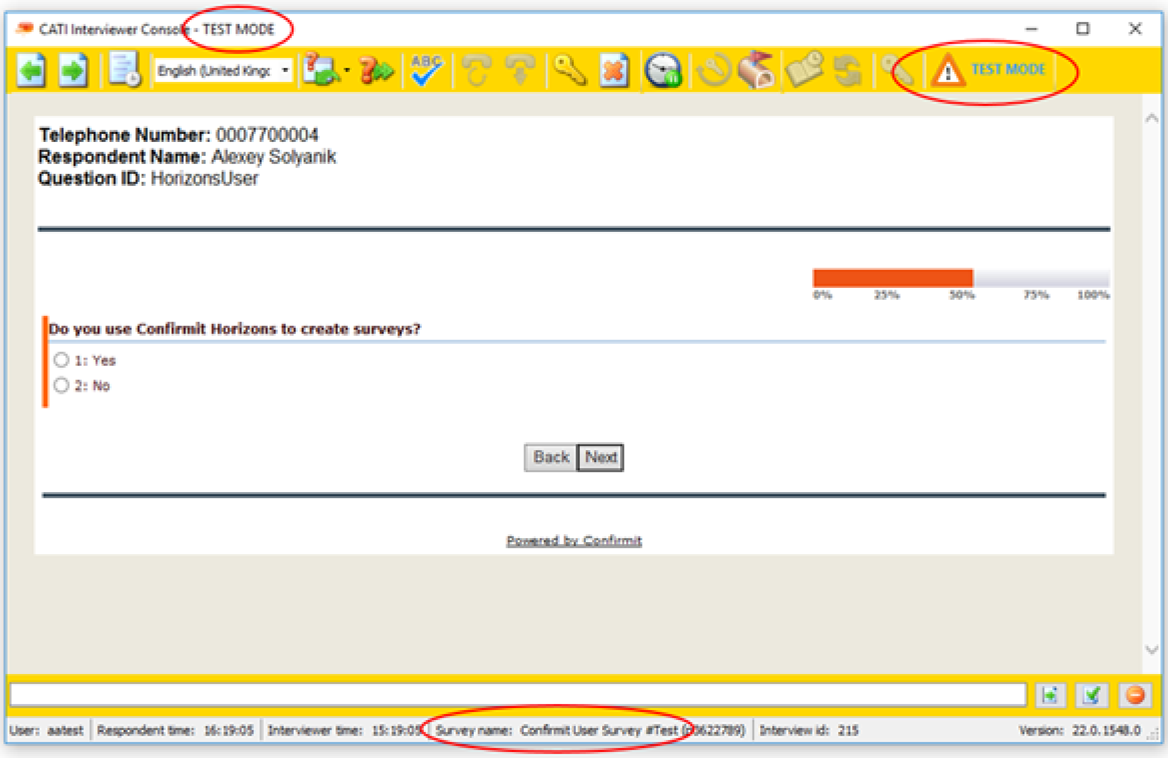


Figure 47 Example of a CATI survey in Test mode

To return the user interface to its normal look, delete the **#Test** text from the survey name and save the changes (see The Overview Page on page 22 for more information).

3.5.6. The Offline App

Note: The Confirmit Offline App is an add-on module; commercial conditions will apply.

AskMe is Confirmit's branded version of the Offline App. Both terms are used in Confirmit documentation.

One of the challenges many companies are now facing is survey apathy; keeping your respondents interested and making surveys engaging is not easy. Adding multimedia such as audio and video to surveys can make surveys more interesting, but increased file sizes mean downloading these files can take time, especially if the connection isn't good. And this can result in buffering problems and associated frustration. In addition, participants need to be able to take part in surveys when and where it suits them - with mobile devices they could be walking around, sitting on a bus or train, or even on a plane.

The Offline App provides a solution to both these challenges. This app allows respondents to complete Confirmit Horizons-created surveys whilst offline. Your respondents are therefore able to complete your surveys in areas with bad or non-existent Internet connectivity, and in addition it guarantees the respondent experience and is ideally suited to surveys displaying or capturing rich media content. The app downloads multimedia files during the initial download of the survey to the app and respondents can then view those files offline, so buffering problems due to slow download or upload speeds are thereby avoided. Data is instantly captured offline, and then synchronized back to the survey when the mobile device is online again. So regardless of whether the respondents have good, patchy or no internet connection, your survey responses won't be lost.

You create your survey using the Confirmit Survey Designer environment, where all of the power of the survey engine is available (the app can also be run in Kiosk mode). A single survey link is sent to your participants via email or SMS, and the participant then chooses whether to open the survey online on their mobile or tablet, or whether they wish to download the app using Smart App Banner. If downloading is selected, the app then runs the survey offline, including any JavaScript customizations, and allows the participant to easily capture photos and GPS data.

Synchronization back to the server is performed only once the interview achieves a specific status, for example “Complete”; partial responses are not synchronized. If the survey has already been closed when the device synchronizes, you can instruct the survey to add the data to the database anyway or you can instruct it to ignore the data being uploaded. The data is then quietly deleted (see Setting Up the Survey on page 40 for more information). Note that quota checks are not performed in offline surveys; the qf() function will always return false when executed in the app.

The Offline App can be branded as your app, with your logo, look-and-feel (this has commercial implications), and it can then be registered in the app stores with your own app name. Survey participants can install the app on as many mobile devices as they wish, at no cost. Confirmit has created an "own brand" version that we have called AskMe. For this reason the Offline App may also be referred to as the Confirmit AskMe app in Confirmit documentation.

The Offline App supports Android phones and tables using version 4.1 and later, and iOS phones and tablets version 9 and later. Note that data stored on the device is not encrypted.

Important
Use of Confirmit Apps may include the use of third party components (“TPC”s), including but not limited to the GoogleTM Firebase range of products. The continued operation of certain features of Confirmit Apps may depend on the continued proper operation of those TPCs. CONFIRMIT explicitly disclaims any warranty for or on behalf of TPCs. Certain device information, such as but not limited to operating system and model, may be forwarded to the provider of the TPCs for ensuring proper and efficient wording of the App and in accordance with the TPC’s terms and conditions. For a full list of TPCs for your specific App, please contact privacy@confirmit.com.

3.5.6.1. Setting Up the Survey

Any of your online Confirmit Horizons surveys can be enabled for offline capture using the Offline App. You create and set up the survey questions as for any other survey, then when setting up the survey for launch you make a few additional settings. If the respondent wishes to use the Offline App when responding to the survey, the app downloads all survey content such as survey layout, multimedia files, images, video and audio files to the respondent's device.

Note that all media files, your company logo etc. that are to be downloaded with the survey must be archived in a survey-specific folder in the File Library (refer to the Confirmit Professional Authoring User Guide for more information). To do this:

1. In the File Library, create a new folder and re-name it to the survey id (for example p123456789).
2. Name your logo file (the image you want to appear as the logo on the Offline App home screen) **survey_logo.png** and save it in the folder.
3. Copy any other media files, video, images etc. that are needed for the survey into the folder.

   These files will then be downloaded with the survey and will be available as required. The logo image will automatically be placed in the correct position in the Offline survey.

The additional settings for the survey are:

1. The JavaScript engine is required for the Offline App. In the **More Settings > Options** area, check the **Use JavaScript scripting engine** box (see Options on page 30 for more information).

Note: When you are creating a new survey, if the Use JavaScript scripting engine setting is not enabled and the survey is NOT a template, when you select the offline channel the JavaScript engine will be enabled automatically. For existing surveys, you must activate the engine manually - see the Important note below.

Important
Enabling the JavaScript engine for existing surveys may cause scripts to fail. So if you select the Offline channel for an existing survey and the JavaScript engine is not already enabled, a message overlay is presented asking you to confirm that JavaScript is to be enabled. Click OK to confirm. All scripts in the survey should thereafter be checked, and updated as necessary.

2. In the **Overview > Settings** or the **Design > Settings** area, select the **Offline app** mode, or when launching the survey, the **Deployment > Details** area also includes the Offline App mode box.

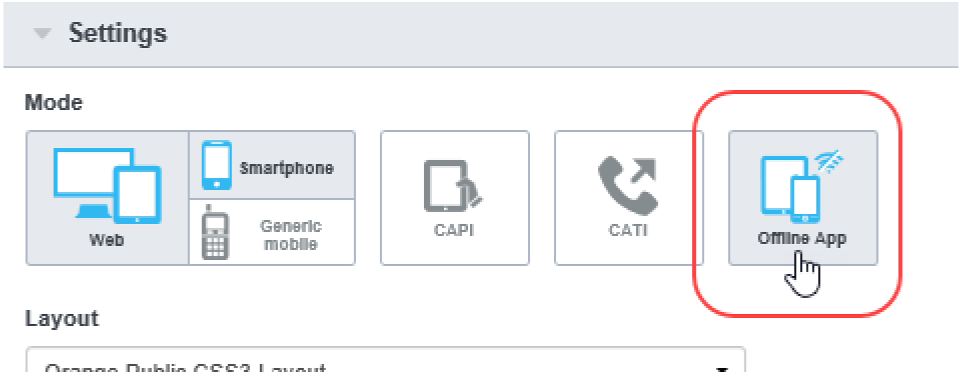


Figure 48 Selecting the Offline App

3. Go to the **Design > Settings** page - the Offline App area is now visible.

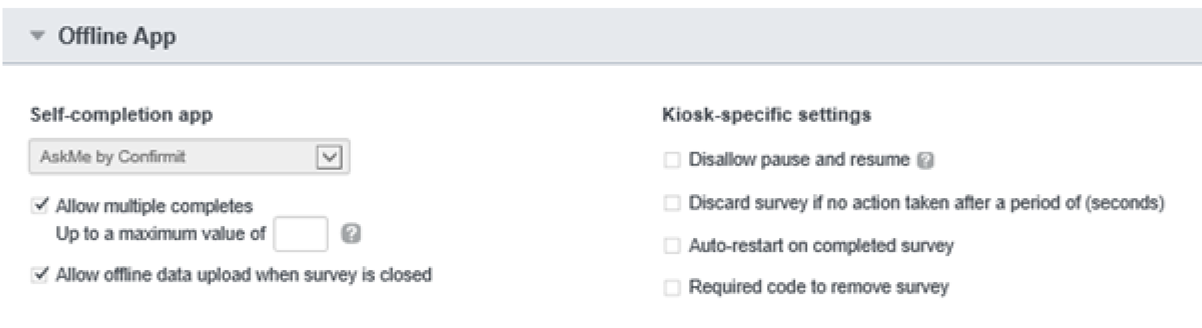


Figure 49 The Offline App settings

- **Self-completion app -** If you have more than one Offline App available, select the app you wish to be used.
- **Allow multiple completes... -** you can set a maximum number of times that the survey can be completed per respondent link. For example the survey could be intended to be re-run each day for a number of days. Both open links and personalized links can allow for multiple survey completions. When personalized links are used, any respondent data is duplicated for every completed interview. Leave the field blank for unlimited.
- **Allow offline data upload... -** when respondents use the app the survey is downloaded to their mobile device and saved for them to complete at their leisure. It is entirely possible that by the time the respondent has completed the survey and the mobile device is back online and ready to upload the data, that the survey has already been closed. In this event, you can instruct the survey to add the data to the database anyway, giving you an additional set of data, or you can instruct it to ignore the data being uploaded. The data is then quietly deleted so the participant will never know that their data was not used. Check or uncheck the box as required.

Kiosk-specific settings

- **Disallow pause and resume -** By default, when using the Offline App a user can choose **Menu > Home** to return to the home screen. This pauses the active survey in progress. Enabling this feature means that a survey cannot be paused; if a respondent leaves the survey before it is completed then the data for that interview will be discarded and the interview cannot be resumed. This then prevents someone else from being able to view a respondent's incomplete answers.
- **Discard survey... -** A common situation with an unattended device is when someone starts a survey but walks away before completing it. Enable this setting to control how long a question page will be visible before the app decides that the user has walked away. When the timeout occurs a "Need more time?" message is displayed for 10 additional seconds. If the user does not select **Yes** within that time, the survey is terminated, saved, and will be uploaded as an incomplete. Note that the timer does not begin until a respondent interacts with the first question page.

- **Auto-restart on completed survey -** when a respondent has completed the survey, the survey will automatically restart ready for the next respondent.
- **Required code to remove survey** - for "standard" surveys the respondent should be able to remove the survey from his/her list once they have completed the survey. However you will not want respondents to be able to remove the survey if you have set it up on a kiosk device. With this property you can apply a pass code that must be input before the survey can be removed from the device, thus protecting the survey from unwanted removal.

Note that you do not have to check the Smartphones mode option if you are using the Offline App. However if you do then the survey will be optimized for smartphones, with touch rendering etc. (see The Settings Area on page 29 for more information).

4. When you are ready, launch the survey (see Launching the Survey on page 198 for more information).

On completion of the launch, the standard survey URL is presented on the Launch Survey page and on the **Overview > Deployment** tab. You can now send this URL as an SMS to your respondents, and if they have the Offline App on their mobile then they can merely tap the URL to run the app and download the survey.

3.5.6.2. Downloading and Running the App

To run the Offline App on your Smartphone:

1. Launch the survey, then load it on the device.

   Either tap **Install** (first time), or **Open in app** (subsequent surveys).

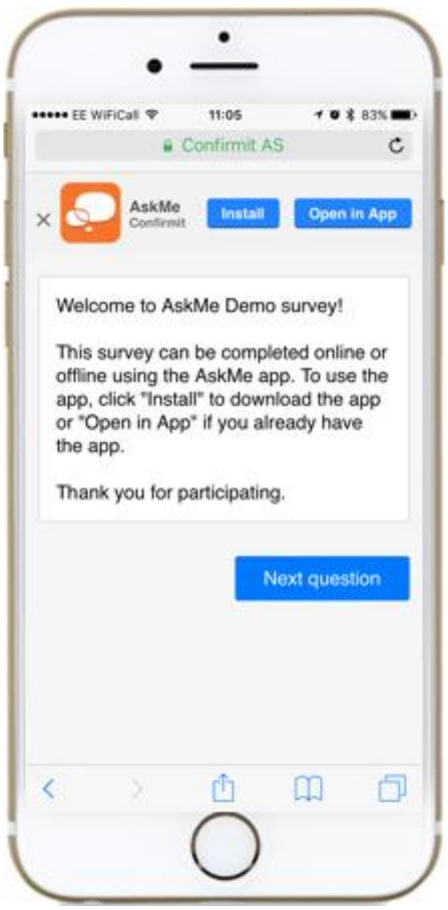


Figure 50 Example of the opening screen

When you open the survey, your screen will look something like the figure below.

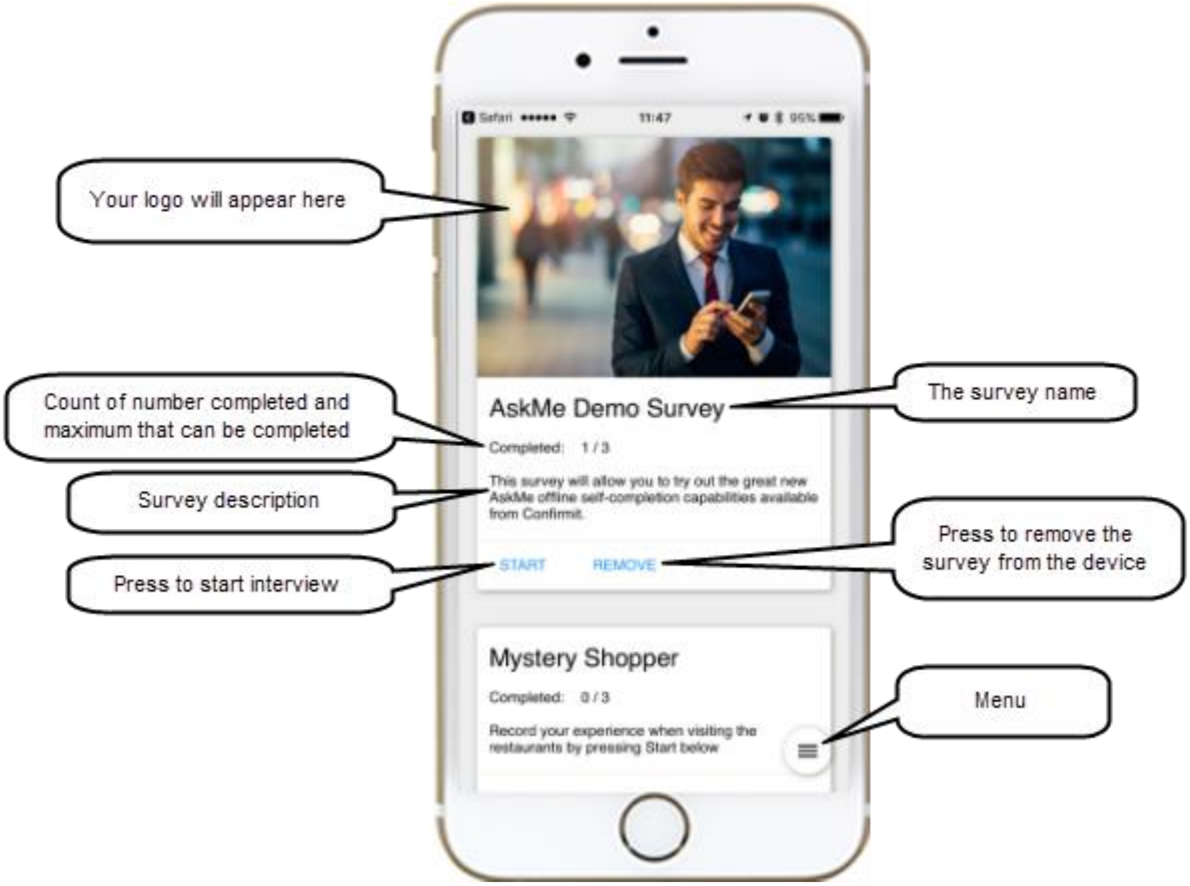


Figure 51 Example of a survey

When the survey is loaded in the app, any uploaded respondent data and any partially collected survey data is also downloaded to the app.

Note that you cannot remove a survey if there is data to be uploaded.

Tab the Menu icon to open the toolbar. The AskMe app has three tool buttons:

- The **cogwheel** - shows a list of the surveys you have available and the AskMe version. Tab the **Home** icon to return to the home page.
- **Refresh** - synchronizes your device and refreshes the list of surveys you have available.
- **Close** - closes the toolbar.

Note: Survey response data stored on the device is not encrypted.

3.5.7. Validation & XSS

Use the Validation & XSS options to specify the checks that are to be made on the respondents' answers before they are allowed to move on to the next question.

You can also add "global" validation code which will be executed for every question in the survey. The code specified here will be executed when each question in the survey is submitted, so the code should be as efficient as possible. The code will be executed before any custom question validation that may be defined. The CurrentForm() function can be used to provide the question ID of the current question, and the getType() method can be used to filter the question types and specify which types the code is executed on.

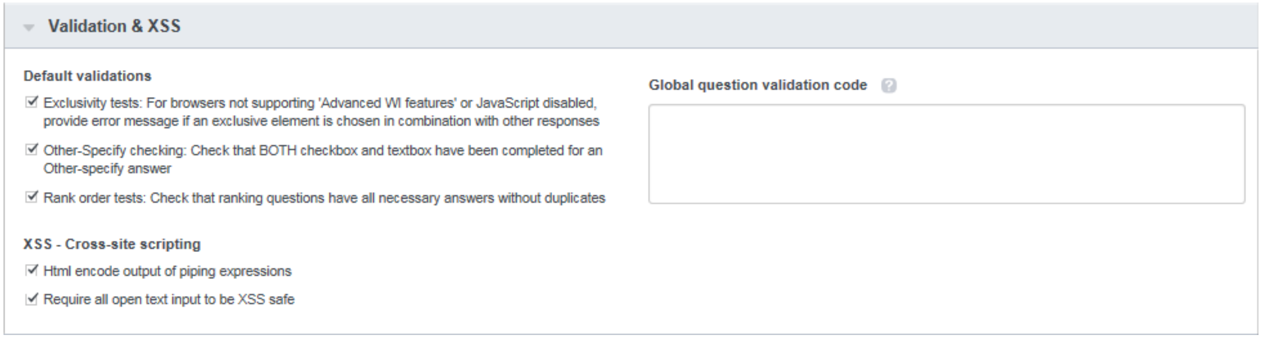


Figure 52 The Validation and XSS settings

- **Exclusivity tests -** the generator produces code that ensures that the respondent cannot select an "exclusive" answer alternative in a Multi question in addition to other answer alternatives in the list. For browsers that have JavaScript disabled, an error message is provided if an exclusive element is chosen in combination with other responses.
- **Other-Specify checking -** the generator produces code that confirms the consistency of user input, i.e. that the respondent both checks off for "Other" and writes in the text box.
- **Rank order tests -** the generator produces code that ensures that the inputs in Multi Ranked questions and Grid questions are unique for each alternative in the list, and consecutive. The questions must be marked as Ranked in the questions' Properties sheet.
- **HTML encode output of piping expressions -** check this box to encode expressions in response piping so the code is not executed.

Note: A site-wide setting is available, called HTMLEncoding, which can be set by the system administrator. This setting, when selected, overrides the HTML Encode Output... checkbox setting and will cause piping expressions to be encoded irrespective of the HTML Encode Output... checkbox setting.

- **Require all open text input to be XSS safe -** the generator validates the input from the respondents and will not accept input containing < and >.

3.5.8. Layout

Use the options in the Layout area to set up the look and feel of the survey.

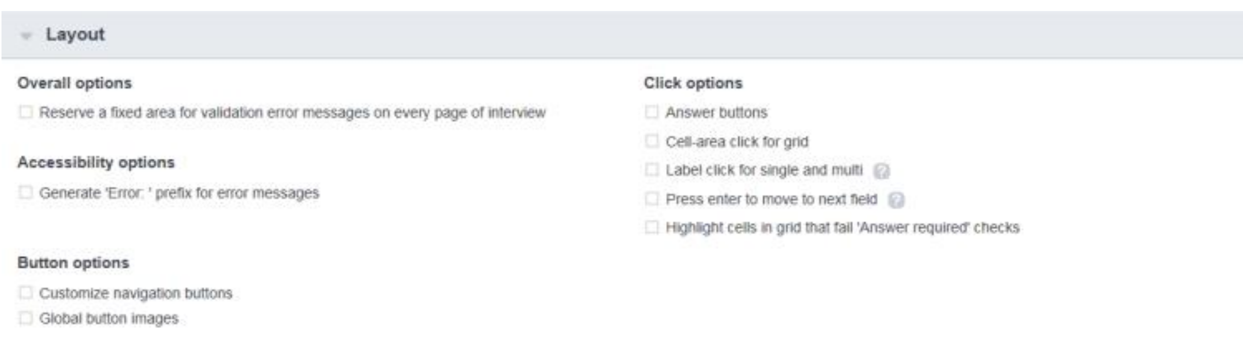


Figure 53 The Layout settings

- **Reserve a fixed area for validation error messages on every page of interview -** select this option if you wish to reserve a small fixed area for page error messages. This prevents the rest of the page from jumping up and down if the interview program displays an error message. As this area consumes space, you may wish to uncheck this option, especially if you are creating a pop-up survey where the window size is limited.
- **Generate 'Error:' prefix for error messages -** when you have chosen a Survey Layout for your survey, the survey will be compliant with the web accessibility requirements. The only requirements that are not covered by Survey Layouts are including a prefix “Error” in front of the error messages and Insert label for ‘Other’ inputs. In this field you can activate the Generate ‘Error’ prefix for error messages, which means that the word “Error” will appear in front of all system error messages.
- **Answer buttons -** check this option to replace all radio buttons and check-boxes in the survey with buttons. You can customize the button layout in the Question Form Input properties pane.

Note: When using Answer buttons, Capture Order is not supported.

- **Cell–area click for grid -** in grids and 3D-grids, this allows the respondent to click in the cell area around the radio button instead of having to click exactly on the radio button itself. This simplifies the selection act for the respondent as he/she does not have to be so accurate with the mouse pointer.
- **Label click for single and multi -** enables the respondent to click the labels as well as the actual checkboxes/radio buttons for single and multi questions, thereby increasing the clickable areas and making the survey easier to answer.
- Press enter to move to next field - allows the respondent to use the **Enter** key on his/her keyboard to move to the next field - simulating the **Tab** key.
- **Highlight cells in grid that fail ‘Answer required’ checks -** highlights any cells in a grid question that fail the "Answer required" checks. This will simplify the survey for the respondent as, if he/she attempts to proceed to the next question before having selected the required number of cells in the grid, when the error message is presented any cells that have not been answered will be immediately visible to them. Note that this also applies if an Other option is selected by the respondent but they do not enter any text into the Other field.

3.6. The Languages Area

This area allows you to view and edit the survey's language settings, and set up links to the web pages that the respondent is sent to on completion of the survey.

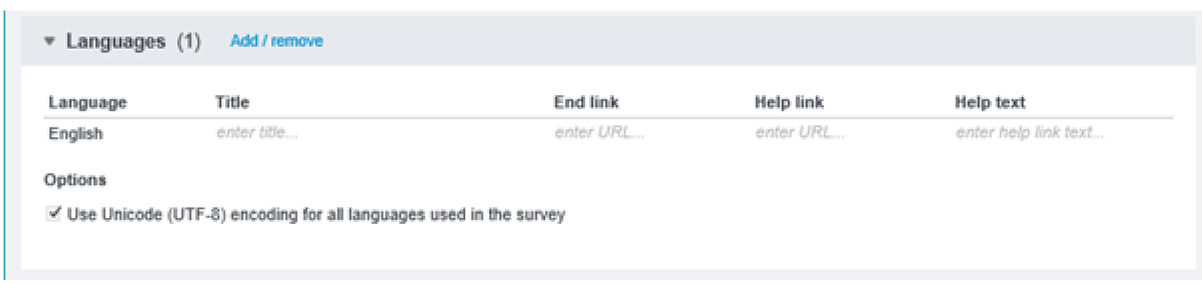


Figure 54 The Languages area

To select or change the languages selected for the survey:

1. Click **Add/Remove**.

   The Language selector overlay opens.

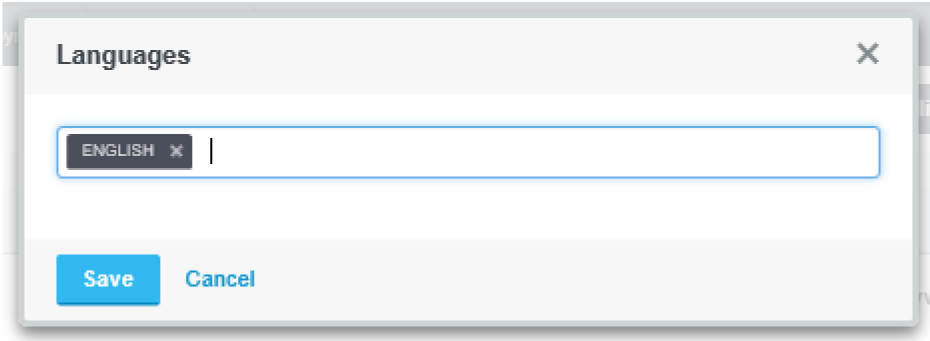


Figure 55 Selecting other languages

2. Click in the language field to open a drop-down list of the languages available, and select the desired language.

   You can scroll down to the desired language, or you can start typing the desired language into the field. As you type, the list will jump down to the first instance of the text string you have typed.

3. On completion, click **Save** to save the changes and return to the Overview page.

To select the default language for the survey, check the appropriate radio button.

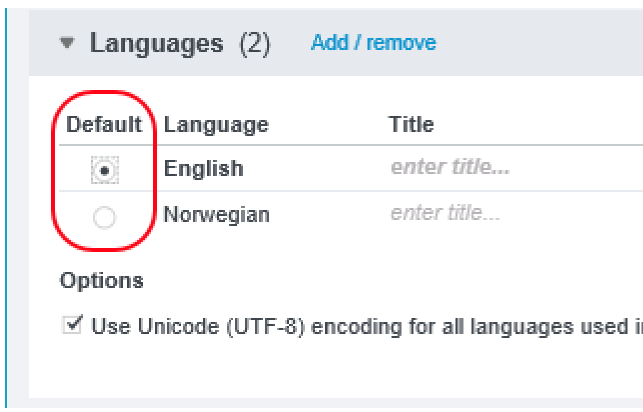


Figure 56 Selecting the default language

If you have more than one language selected and your company has licensed the Translations add-on, the **Manage translations** link appears towards the right end of the Languages area header bar. This functionality allows you to perform survey text translation using Excel.

You can set up URL links for each selected language, to web pages to which the respondent will be sent on completing the survey and to provide additional information.

- **Title -** the name of the survey will appear in the respondent's browser window. If a title is provided for the selected language, this will be displayed instead of the survey name.
- **End link -** enter the URL of the website you wish the respondents to be sent to after they have finished the survey. You can add one URL for each survey language, so you can send the respondents to, for example, websites in their local languages or the website of your company's branch office in their country.
- **Help link -** enter a URL to a website you wish to use either for additional information or for other purposes in the questionnaire. If a respondent clicks on a link in a survey, a new browser window will open. Again, you can add one URL for each survey language.
- **Help text -** this field controls the appearance of the Help link. You may substitute the address with another text.

- **Use Unicode (UTF-8) encoding... -** enforces Unicode (UTF8) encoding when the survey is rendered, irrespective of which language is being used in the survey. This will avoid problems such as can occur when the respondent enters characters not expected in the current language/codepage into an answer, which is then saved incorrectly.

3.6.1. Manage Translations

If your survey has more than one language selected and your company has the translator add-on, then the Manage translations link is available towards the right end of the Languages area header bar.

Figure 57 The Manage translations link

Click the link to open the Manage translations overlay allowing you to download and re-upload survey texts.

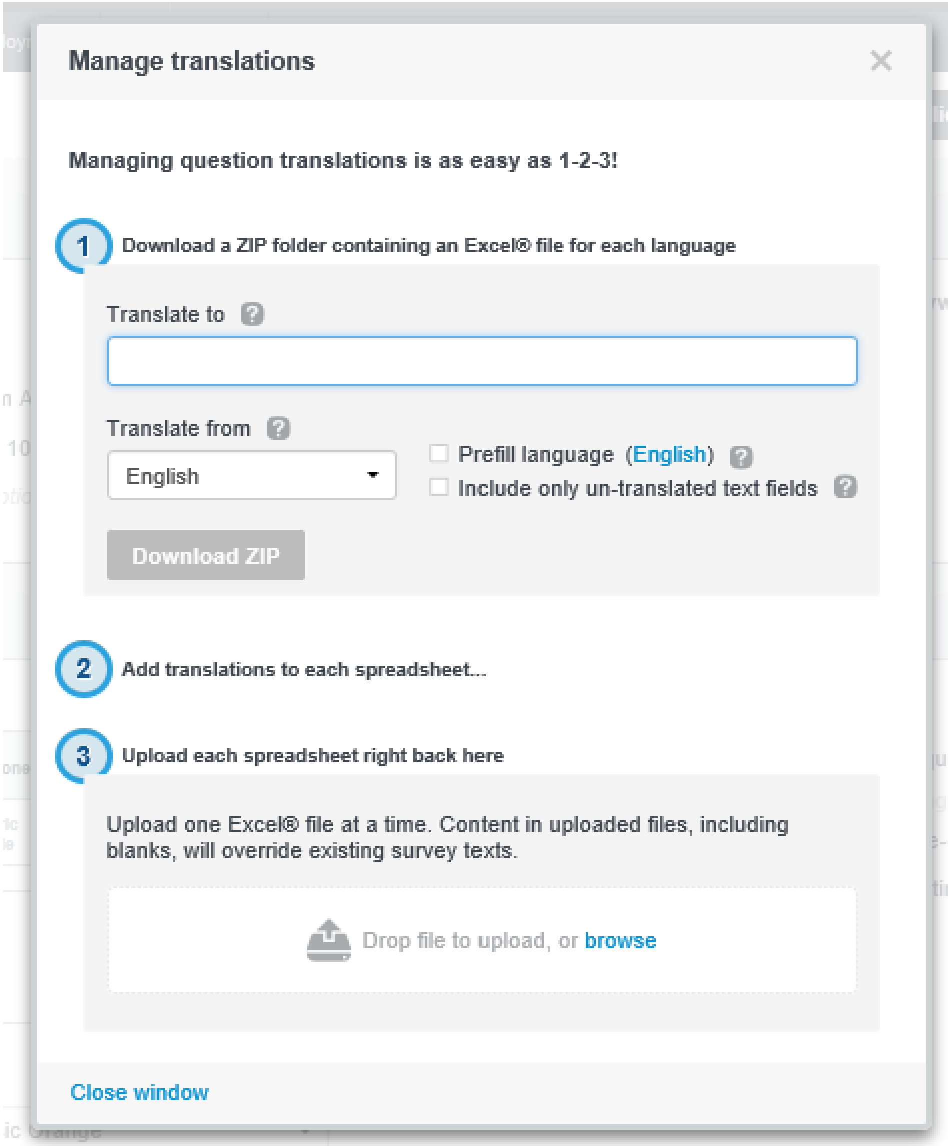


Figure 58 The Manage translations overlay

1. Click into the **Translate to** field.

   The languages selected for the survey (see The Languages Area on page 45 for more information) are listed.

2. Select the language(s) that you wish to translate the survey texts to.

   The selected language will be presented as the second column in the Excel® file. Note that you can select as many of the available languages as you wish; each selected language will be presented as a separate Excel® file within the zip file.

3. The default language is shown in the **Translate from** field. Click into this field and select a different language from the list as required. The texts in this language will be listed in the first column in the Excel® file.

- **Prefill language -** check this box to fill any empty (untranslated) fields in the 'Translate to' column(s) with the texts in the selected language. Click the language link to change the selected language.

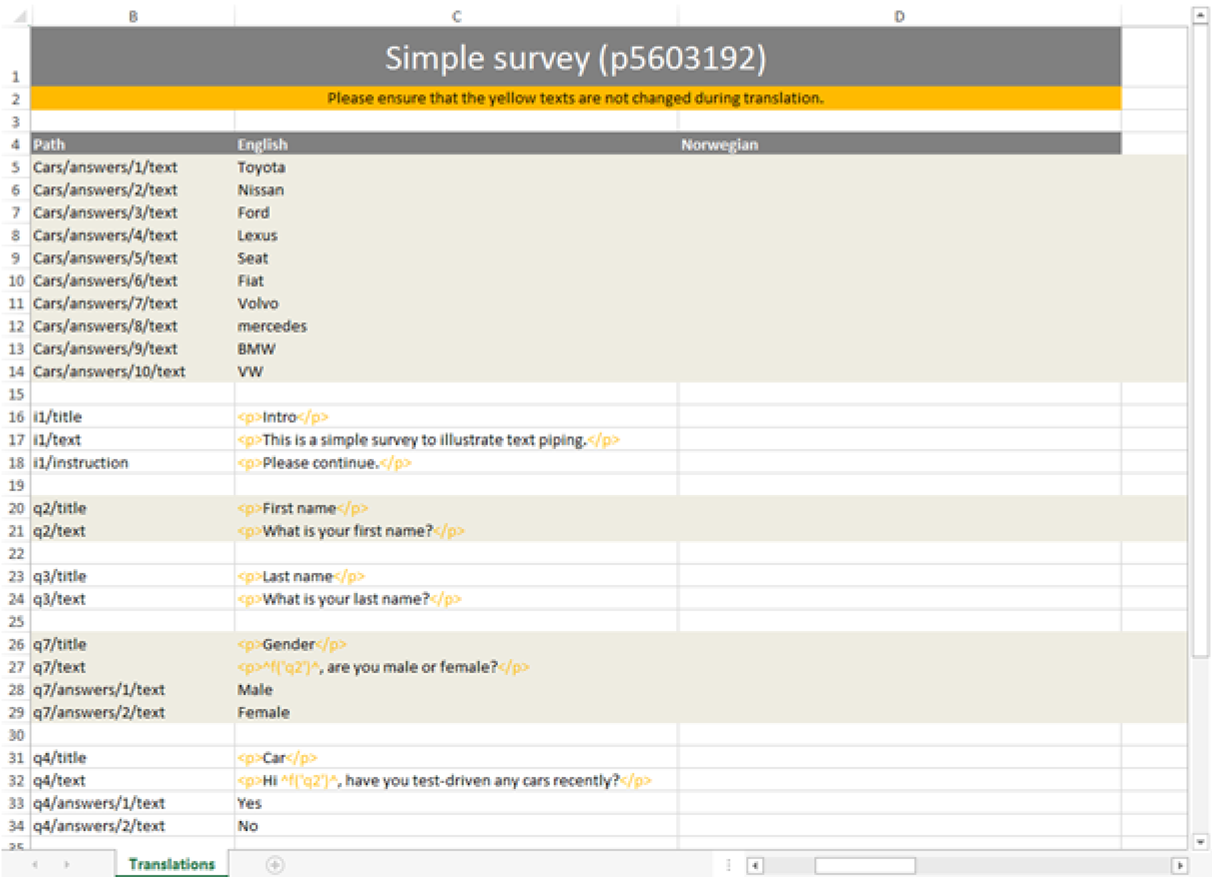
Note: This will be useful if you have for example text piping in questions, as the code will be copied into the translation columns along with the default texts and the translator will then only have to change the text.

- **Include only un-translated... -** when this box is selected, only empty (un-translated) fields are included in the Translate to column.

4. Click **Download ZIP**.

   The ZIP file is created and a standard 'open or save' dialog is presented.

5. Save the file as required, unzip it, open it, and translate the texts as necessary, adding your translations into the appropriate fields.



Simple survey (p5603192)

Please ensure that the yellow texts are not changed during translation.

Path	English	Norwegian
Cars/answers/1/text	Toyota	
Cars/answers/2/text	Nissan	
Cars/answers/3/text	Ford	
Cars/answers/4/text	Lexus	
Cars/answers/5/text	Seat	
Cars/answers/6/text	Fiat	
Cars/answers/7/text	Volvo	
Cars/answers/8/text	mercedes	
Cars/answers/9/text	BMW	
Cars/answers/10/text	VW	
i1/title	Intro	
i1/text	This is a simple survey to illustrate text piping.	
i1/instruction	Please continue.	
q2/title	First name	
q2/text	What is your first name?	
q3/title	Last name	
q3/text	What is your last name?	
q7/title	Gender	
q7/text	^f('q2')^, are you male or female?	
q7/answers/1/text	Male	
q7/answers/2/text	Female	
q4/title	Car	
q4/text	Hi ^f('q2')^, have you test-driven any cars recently?	
q4/answers/1/text	Yes	
q4/answers/2/text	No	

Figure 59 Example of the Excel® file for a survey

Important
Be careful that you do not change or delete any of the yellow text (the HTML code) in the file as doing this will create errors in the survey.

6. Once the required translations have been added to the appropriate fields in the Excel® file, save the file.

7. In the Manage translations overlay, click **Browse**.

   A standard file browser window opens.

8. Find and select the Excel® file, then click **Open**.

   The file name is presented in the Manage translations overlay.

9. Click **Upload file**.

   The file is uploaded into the survey, overwriting the survey texts.

You can download several languages simultaneously; separate Excel files will be created for each selected language, and will be zipped into the same download file. The texts have color highlighting for HTML and piping/script syntax. Any errors or warnings are provided as a new tab in the Excel® file for easy reviewing.

In the event changes are made to the survey while the file is being translated, for example a question is deleted, then a message is displayed towards the bottom of the Manage translations overlay.

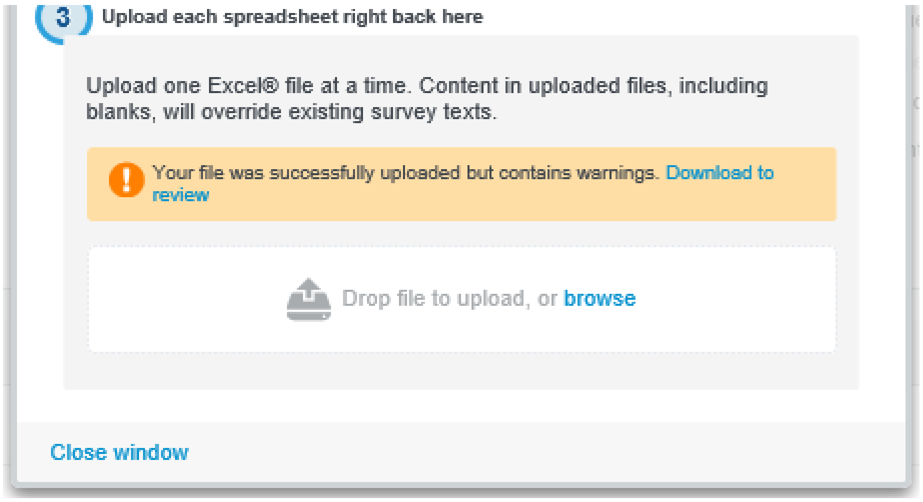


Figure 60 In the event of a change, a message is displayed

An ImportErrors sheet is added to the file, and you can download the file to view the error(s).

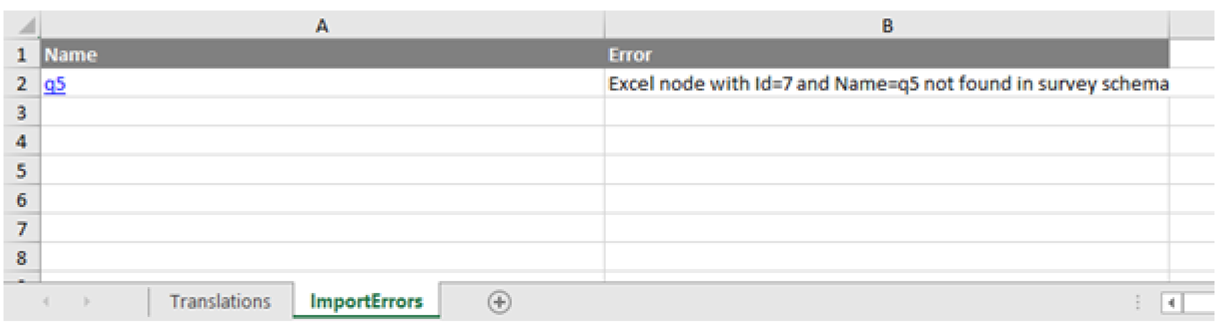


Figure 61 Example of an error in the ImportErrors sheet

Note: The error notification is for information only and merely indicates that something doesn't match. All the questions are processed and the other texts are imported into the survey.

3.7. Duplicating a Survey

To duplicate a survey:

1. Open the survey you wish to duplicate.
2. In the survey's Overview page, click **Duplicate**.

   The Duplicate Survey overlay opens.

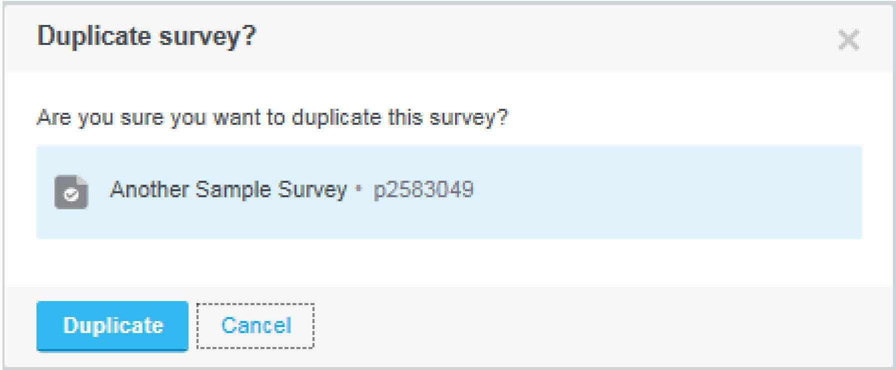


Figure 62 The Duplicate Survey overlay

3. Ensure you have selected the correct survey then click **Duplicate**, or click **Cancel** to close the overlay and return to the Overview page.

   The survey is duplicated, and on completion the new Copy of ... survey opens at its Overview page. You can now edit the name of your new survey and set the other options.

3.8. Deleting a Survey

To delete a survey:

1. In the Survey List, open the survey you wish to delete.
2. In the survey's Overview page, click **Delete**.

   The Delete Survey overview opens.

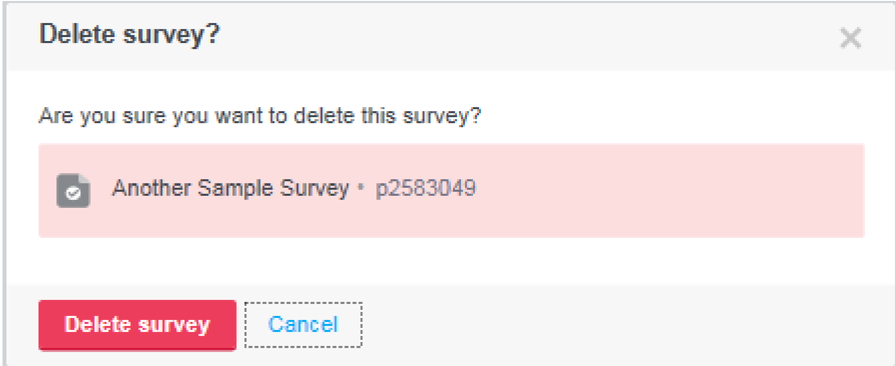


Figure 63 The Delete Survey overlay

3. Ensure you have selected the correct survey then click **Delete**, or click **Cancel** to close the overlay and return to the Overview page.

   The survey is deleted, and on completion you are returned to the Survey List page and a confirmation message is displayed across the top of the page.

3.9. Exporting a Survey Definition

You can export and import surveys from one system to another through XML, allowing you to transfer survey definition files from one Confirmit server to another. To export a survey:

1. In the Surveys list, open the survey.

2. In the survey's Overview page toolbar, click **Export**.

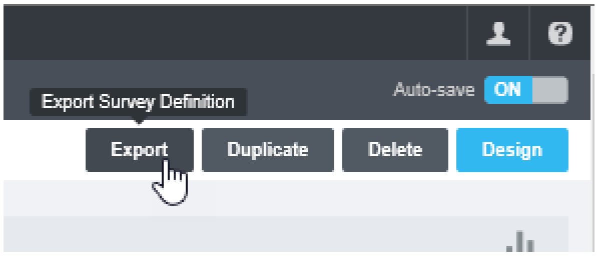


Figure 64 Selecting Export

A standard "Do you want to save..." dialog opens towards the bottom of the Survey Designer window.

3. Click **Save** to save the file in your default downloads folder, or **Save as** if you want to save the file in another location.

The file is saved as a .zip file to the appropriate location, and can be imported into the same or another Confirmit system (see Importing a Survey Definition on page 20 for more information).

Note: The export functionality allows you to transfer the survey definition; it does not transfer survey data.

4. The Design Page

The Design page is where you create and edit your surveys. When you click on a blue survey name link in the Surveys list, you are taken first to the Overview page for that survey. Four tabs are available:

- **Overview -** opens by default, and holds all the survey settings whereby you specify display mode, layout, languages and validation options (see The Overview Page on page 22 for more information).
- **Design -** is where you build your survey. Here you add and set up questions and nodes, ordering them as required so the result is the survey you want to send to your respondents. Here you also have access to the survey settings (see The Design Tab on page 53 for more information).
- **Deployment -** is where you launch the survey. Here you create and update the databases (see Launching the Survey on page 198 for more information), and if you have a list of respondents to whom you wish to send your survey, you can also upload the list to the survey here.
- **Permissions -** for all surveys, the user who creates the survey is the survey administrator and owner, and a survey is initially invisible and inaccessible to all other Confirmit users. As the survey administrator you have full access to view, edit and delete the survey, and can manage all modules, and you must give access permission to any other users who are to be able to view or edit the survey. Go to the Permissions tab to allocate access permissions (see Permissions on page 226 for more information).

4.1. The Design Tab

The Design tab is where you create and set up the questions you wish to present to your respondents. You build the survey in the Survey column on the left side of the tab, putting the questions and other nodes in the order in which they are to be presented to the respondents. When you first create a new survey the column will be empty, and the Add Item overlay is open. To add questions and nodes to the Survey column, click ONCE on an item in the overlay.

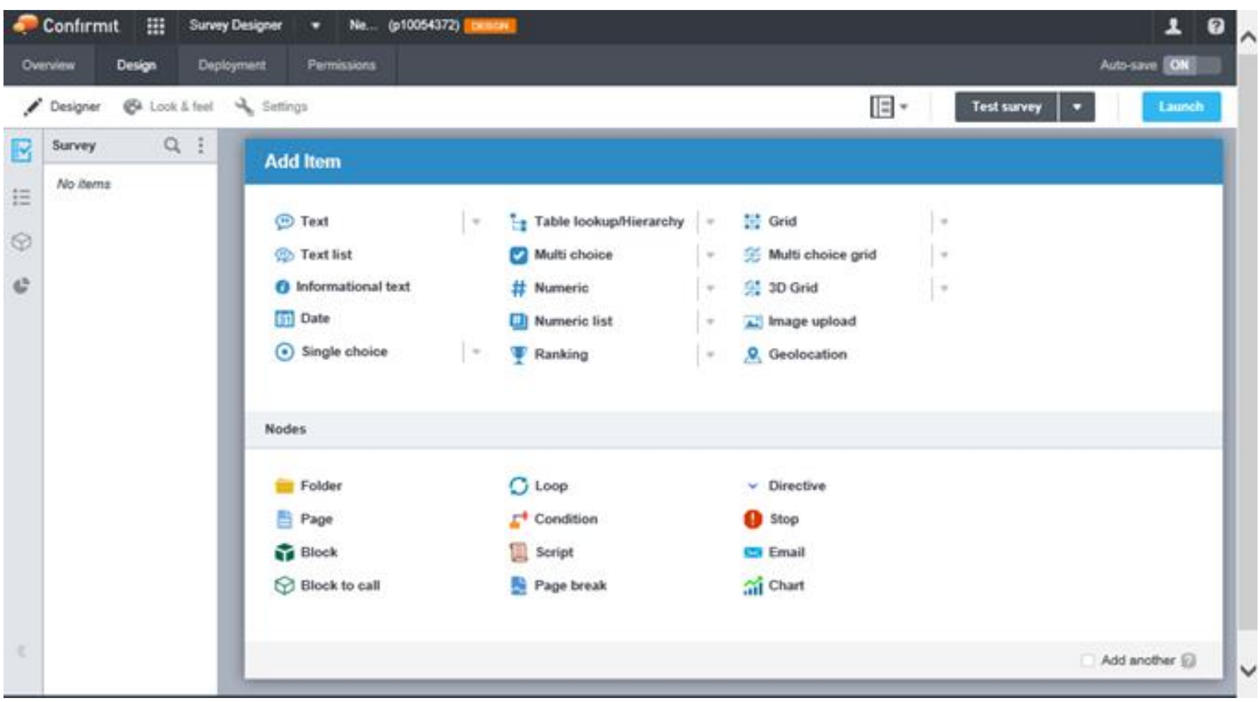


Figure 65 The Design tab for a new, empty survey

Tip
If you already know what the general layout of the survey is to be, you can quickly add the required questions and nodes with a minimum of clicks, then return to each later to set it up with texts, answers etc.
Check the **Add another** box in the lower-right corner of the Add Item overlay. Then when you select an item for the survey, the overlay re-opens immediately allowing you to select the next item. If this box is not checked, then when you click on an item to add it to the survey, the overlay closes and the question details page for the question opens in its place.

If the survey column has some questions or nodes already in place, then the last item that was worked on will be selected and its Question Details page will be open in the design area.

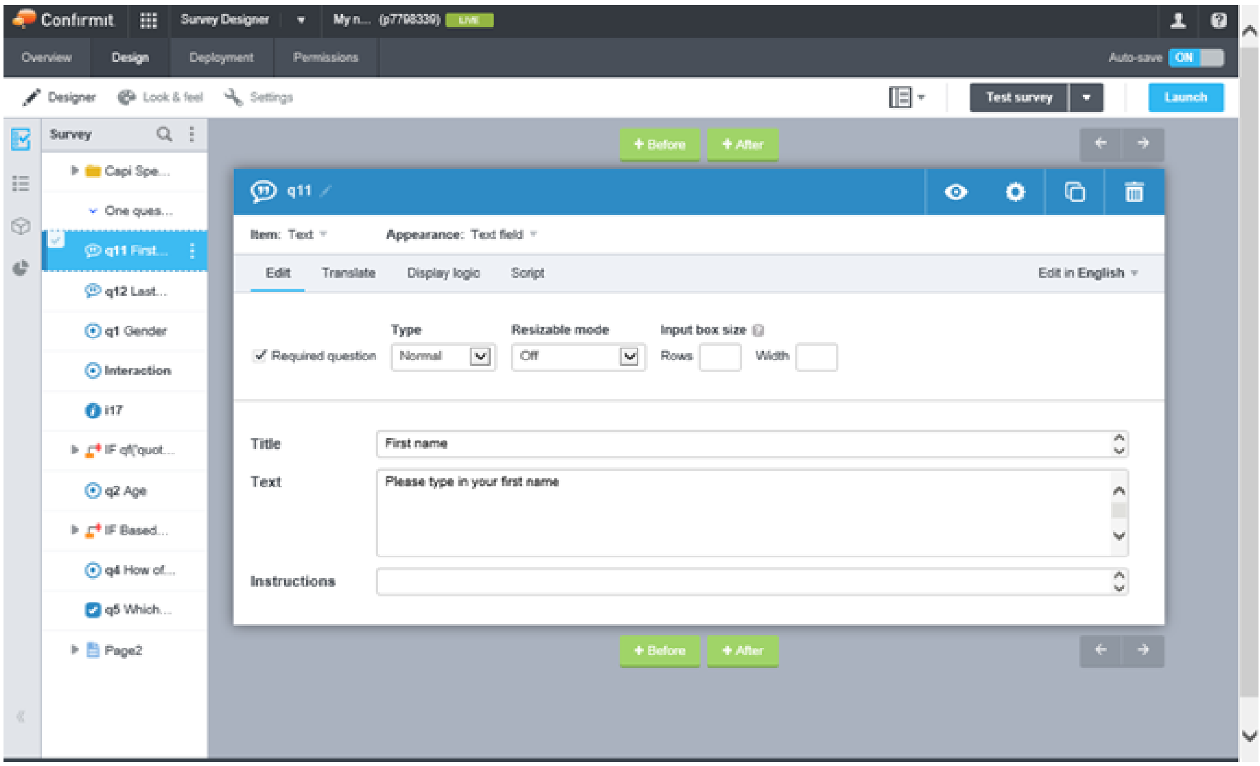


Figure 66 Example of a Question Details overlay

If you wish you can close the survey column (maybe you would prefer to have more space in the design area). To do this merely drag the column's right edge until the column has closed. You can then move through the survey questions by clicking the **Next** and **Previous** arrow buttons located both above and below the overlay towards the right side. If you browse to a question that has been deleted, then its question details overlay will have a gray toolbar. When you want to re-open the survey column, click on the border between the icon column and the design area, and drag it to the right as required.

4.2. The Survey Column

You build your survey in the Survey column on the left side of the Designer page, placing the questions and other nodes into the column in the order in which the respondents are to experience them.

- To select a question for editing, click on it in the column. The selected question is highlighted and its Question Details overlay is presented in the editing pane on the right.

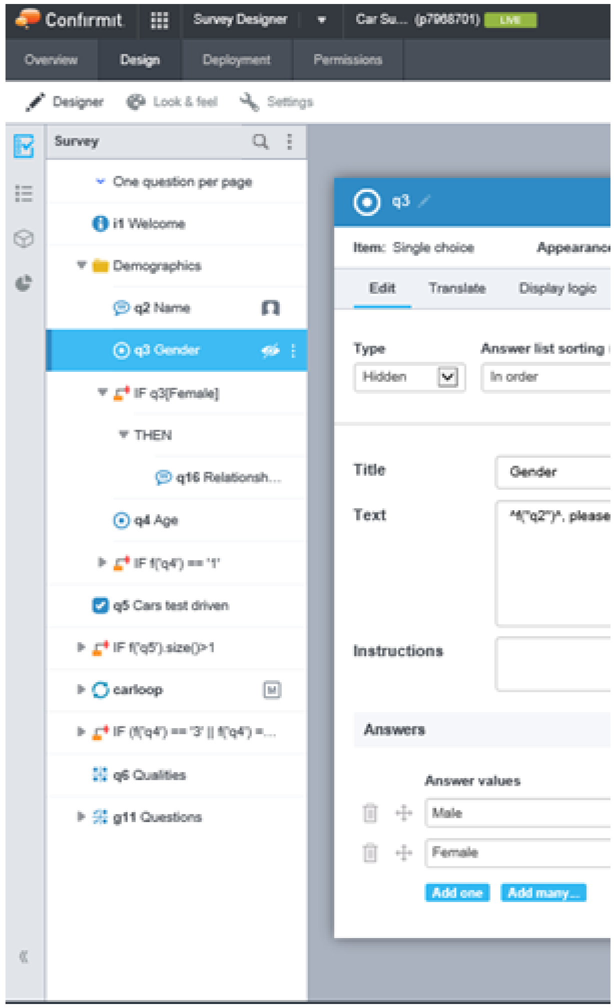


Figure 67 Example of a survey in the Survey column

- A column of icons is displayed to the left of the Survey column. These icons provide access to the Reusable lists, Call blocks and Quotas panes, and when one of these panes is open the top icon will return you to the Survey column.
- The Survey column also has a drop-down menu of options to allow you to adjust the presentation of the column (see The Survey Column Icons and Overflow Menu on page 57 for more information). The active icon is highlighted.
- Click the icon in the lower-left corner of the column to hide/show the Survey column.
- To re-size the Survey column, hover the mouse pointer over the right edge of the column's scroll-bar such that the pointer changes to a double-head arrow, then drag the edge of the column to the desired width. If a question ID and title text is too long to fit into the column width, then the text will be truncated. In this case, to see the full text, hover the mouse pointer over the question in the survey column.
- Badges are added to the question rows to indicate if the question is hidden, background, or has any masking or validation code. When the question details page is open for a question, any badges applicable to that question are also displayed at the top of the page.

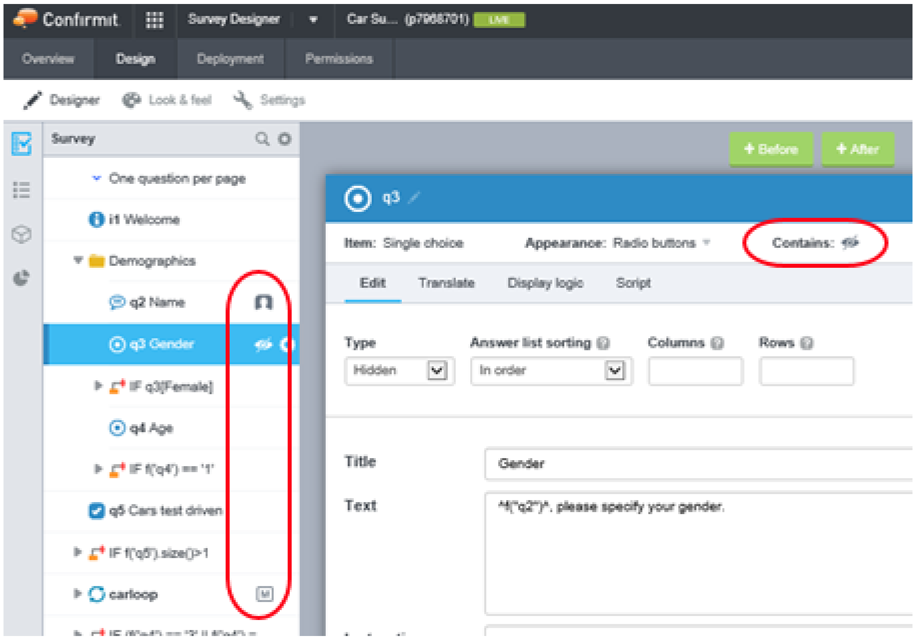


Figure 68 Badges indicate whether the question is hidden, background, or has any masking or validation code

- Each item in the Survey column has its own overflow menu icon. Click this icon to open a drop-down menu with a list of the options currently available to that item. Note that the options available will vary depending on the item type and the situation.

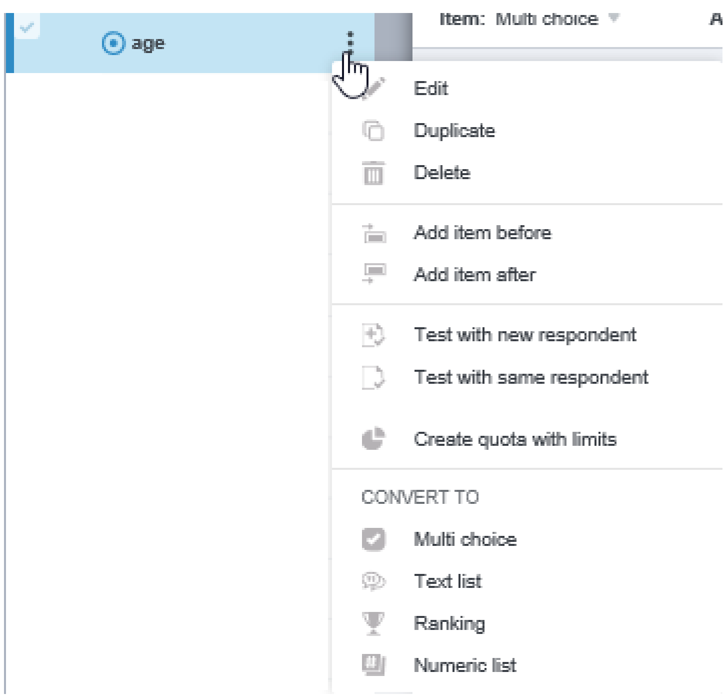


Figure 69 Example of the overflow menu for an item in the survey column

The functionality available from this menu is described in other sections of this User Guide.

Note that there is no Survey Designer "right-click functionality" in the Survey column.

4.2.1. Moving Through the Survey Column

In addition to merely clicking on a node of interest, you can use a number of keyboard navigation actions to assist you when moving in the Survey column. These include:

- Your keyboard **Up** and **Down** arrow keys move up and down to the previous or next node in the column.
- Your **Right** and **Left** arrow keys expand and collapse the current node if it is a "parent" container (for example a Folder, Page Loop,
- or Condition).
- **Enter** opens the node for editing.
- **Space then click** checks and unchecks the nodes for multi-selecting (press **Space**, then click on the items you want to select/deselect).
- **Delete** deletes the node.
- **Escape** stops selecting nodes when you are in multi-select mode, and deselects all previously-selected nodes.

4.2.2. The Survey Column Icons and Overflow Menu

The Survey column has a number of icons down the left side, and an overflow drop-down menu at the right end of the header bar. The icons allow you to select between the various options listed below, and the overflow menu contains options allowing you to adjust the presentation of the column.

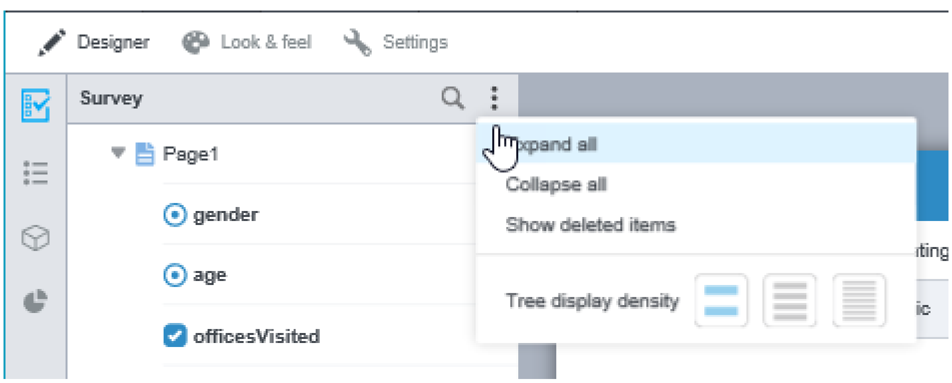


Figure 70 The Survey column icons and overflow menu

In the left column, the "active" icon is highlighted.

- The Survey tree is displayed by default. If you have been working with reusable lists or call blocks, click the **Survey** icon  to return to the survey tree panel.
- Click the **Reusable lists** icon  to open the Reusable lists panel. Here you can create and edit your lists (see Reusable Lists on page 155 for more information).
- Click the **Call blocks** icon  to open the Call blocks panel. Here you can create and edit your blocks (see The Block Node on page 82 for more information).
- Click the **Quotas** icon  to open the Quotas panel. Here you can create and edit your quotas (see Quotas on page 175 for more information).
- To open the menu, click the overflow icon in the column header.
    - o **Expand all -** expands all of the items and nodes, such as folders, pages, conditions etc. such that you can see their contents.

- **Collapse all -** collapses the items and nodes such that only the top level items are displayed in the column.
- **Show/Hide deleted items -** if you have deleted some items from the survey, these will be soft-deleted and you can view them in case you need to reinstate some of them. The Show/Hide deleted items option allows you to toggle them on and off as required.
- **Tree display density -** if you have a large survey you can reduce the text size and the spacing between the items in the survey column such that you can see more of the survey in the column. The selected display density is highlighted.

4.2.3. The Survey Column Search

The Survey column and the Call Block list have their own, separate search facilities, so in the event your survey is extensive you can easily find the questions you wish to work with.

Note: For the Survey column, the search looks through the HTML source for the question ID and Title fields. So any HTML tags used in these fields will also be found.
The Survey column and Call Block column are searched separately - open the Call Block column and add your criteria to search it.

Click the search icon in the survey column header (ringed below) to open the search field.

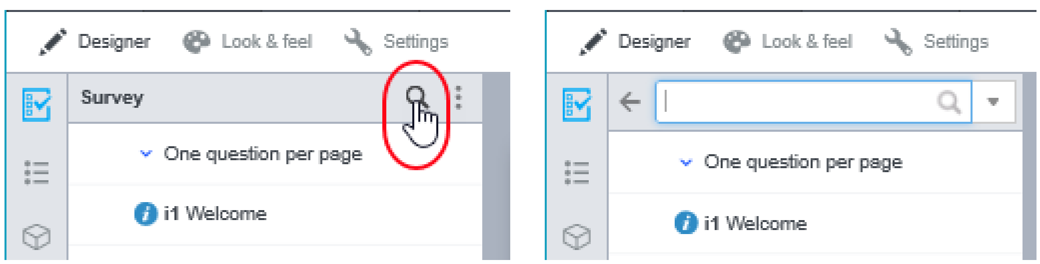


Figure 71 The survey column search icon, and the resulting search field

When you have searched and found a reduced list, you can edit these items, and you can use multi-select (see Selecting Multiple Items in a Survey on page 124 for more information) and edit as appropriate. Note however that you cannot move items in the Survey column while the search is active - this would not be logical as you cannot see many of the other items so you would not know where you were moving the item to.

Press the **Esc** key on your keyboard to clear the search and repopulate the column.

Click the left-arrow icon to close the search facility.

4.2.4. The Survey Column Filter

The Survey column has its own filter facility, so in the event your survey is extensive you can easily find the questions you wish to work with.

Note: The Survey column and the Call blocks column are filtered separately - open the Call Block column to filter it.

1. Click the search icon in the survey column header (ringed below) to open the search field, then click the down-arrow (arrowed) to open the Select filters overlay.

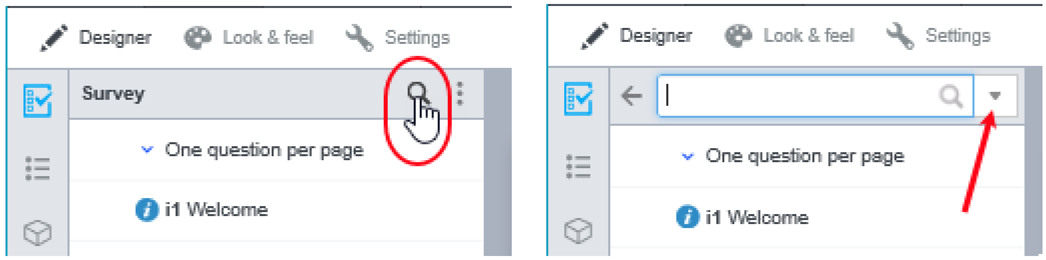


Figure 72 Opening the Select filters overlay

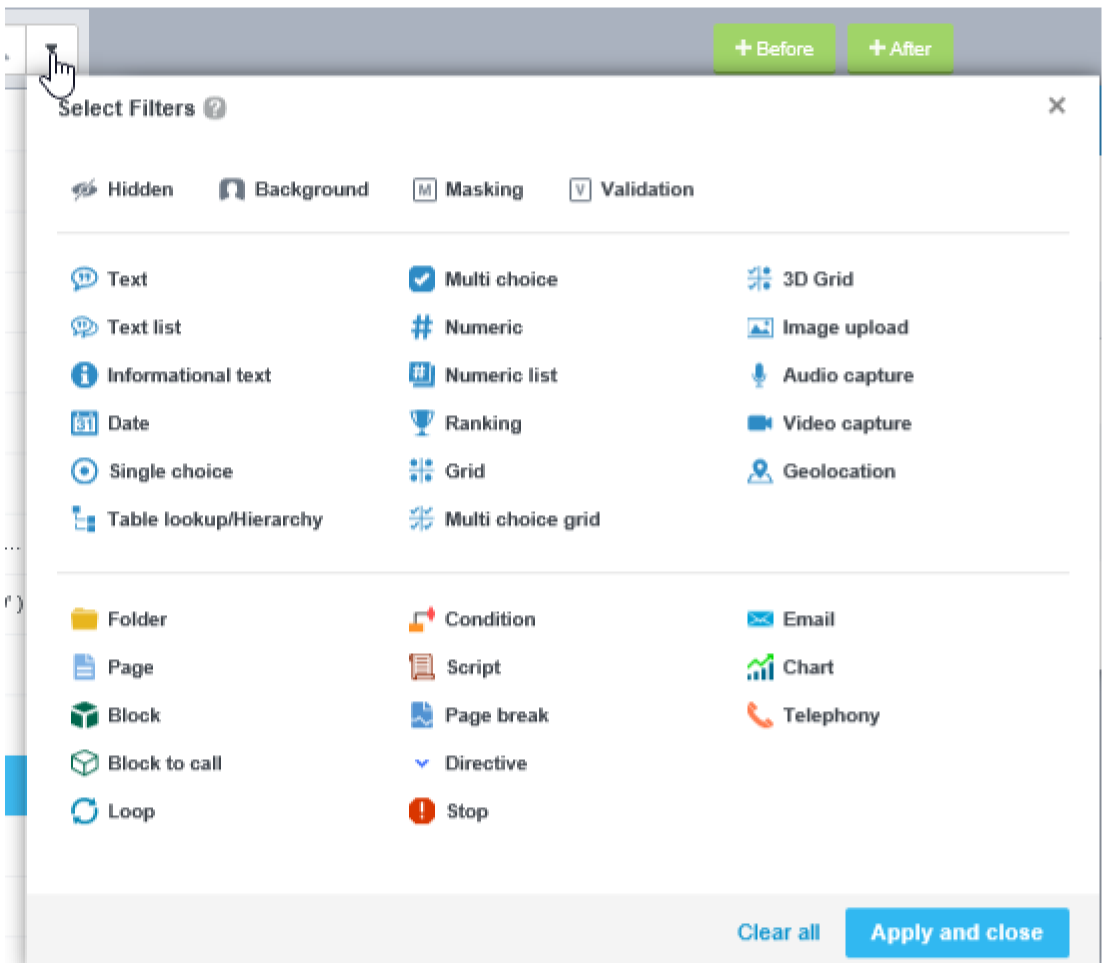


Figure 73 The Select filters overlay

In the Select filters overlay, click on the question and node types you are looking for to select them, then click **Apply and close** to apply the filter to the survey column.

The filters that are applied are shown at the top of the Survey column, and the survey column will then only show the question and node types you have selected.

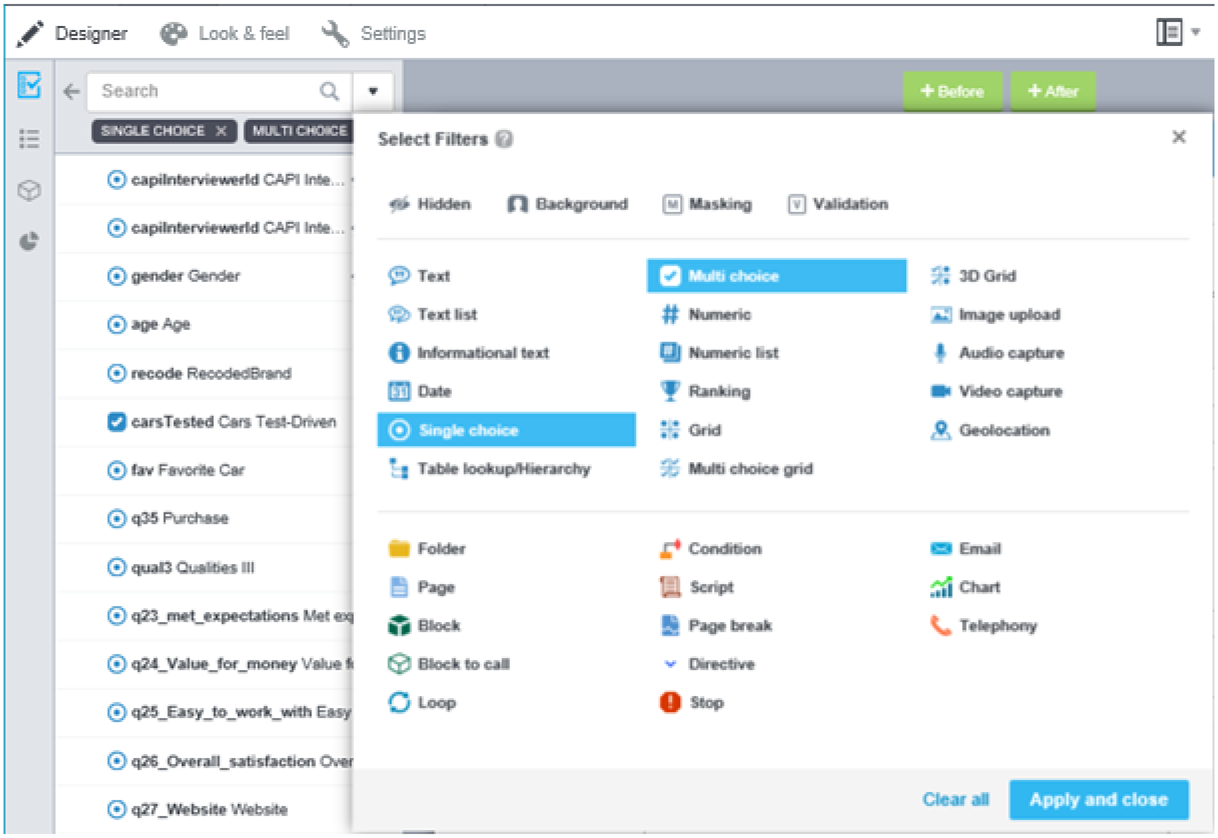


Figure 74 Example of the survey column with a filter applied

You can filter for any combination of any type of question or node, and for hidden or background questions or questions that have masking or validation applied. Note that the Hidden, Background, Masking and Validation filters are applied using AND, so for example if you select **Single choice** questions and the **Hidden** filter, then only hidden single questions will be displayed in the survey column.

When you have filtered and found a reduced list of the questions you want to work with, you can edit these items and you can use multi-select (see Selecting Multiple Items in a Survey on page 124 for more information) and edit as appropriate. Note however that you cannot move items in the Survey column while the filter is active - this would not be logical as you cannot see many of the other items so you would not know where you were moving the items to.

Click the **X** beside a filter label at the top of the Survey column to remove that filter, and click the left-arrow beside the Search field to return to the un-filtered Survey column. The filter is remembered; click the search icon again to re-apply the filter.

4.3. How to Create a New Survey

1. When in the Surveys list, click the **New Survey** button in the upper-right corner of the window, or go to the **Survey Designer** menu and click **Create New Survey**.

   The New Survey page opens.

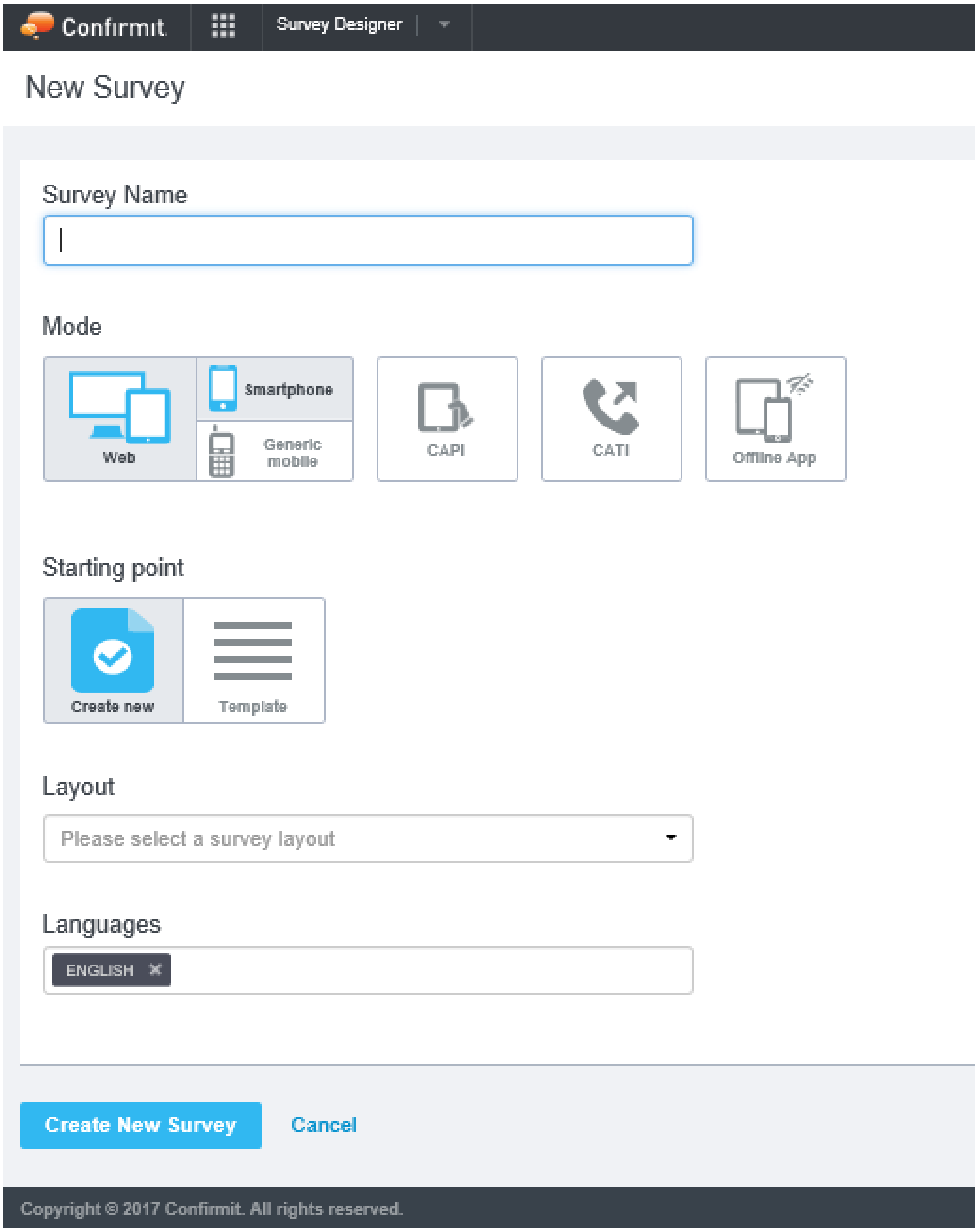


Figure 75 The New Survey page

2. Type a name for your new survey into the Survey Name field.

   The survey name can comprise a maximum of 64 characters.

3. Select the modes in which the survey is to be presented to the respondents (see The Settings Area on page 29 for more information).

4. Select the starting point.

   Do you want to create an entirely new survey, or do you want to base your new survey on a template? If you select Template, a list of the survey templates you have access to is presented. Refer to the Authoring User Guide for details on how to create a survey template.

5. Select the layout you wish to use (see Survey Layouts on page 62 for more information).
6. If your survey is to be multilingual, click into the Languages field and select the languages that are to be used (see The Languages Area on page 45 for more information).
7. Click **Create New Survey**.

The survey now exists, and the Survey Designer page opens (see The Design Tab on page 53 for more information). You can now add the questions you wish to present to your respondents, and structure the survey using the nodes available. Note that Confirmit has given the survey a unique Survey ID - the pxxxxxxxx number beside the survey name in the Confirmit menu bar at the top of the page.

4.3.1. Survey Layouts

Survey Layouts are used to customize the look and feel of your surveys, enabling you to design your survey pages and questions in detail. Three basic types of survey layouts are available:

- "Standard" survey layouts.
- Easy Layouts are simpler, and can be edited in Confirmit Express. They contain some specific HTML styles and settings.
- Responsive layouts allow the survey to adapt automatically to suit the device the respondent is using to answer the survey, be it a mobile phone, a pad, a laptop or a desk display (see Responsive Rendering on page 186 for more information).

Important
To achieve full compatibility with the various devices your respondents may be using so your surveys are always presented correctly, <u>you are strongly advised</u> to use only responsive layouts in your surveys. Note that some of the functionality in Survey Designer is only supported by responsive layouts.

To select a survey layout for your survey:

1. When in the survey's Overview page, expand the **Settings** tab, or when in the Design page, click **Look & Feel** (see The Layouts, Themes & Colors Page on page 187 for more information).
2. Click in the **Layout** field.

   A list of the layouts available to you opens.

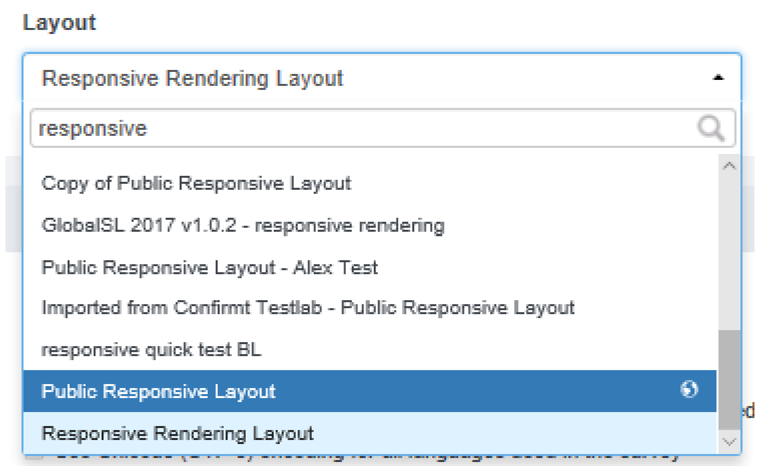


Figure 76 Selecting the survey layout

Note that in the event you have a large number of layouts available, you can search for the one you wish to use. Type a text string into the search field. As you type, the list will be reduced to include only those layouts that include that text string somewhere in the name of the layout. You can type partial words, multiple words, type them in any order, and separate them with a space; you do not need to use the ***** wildcard. Any characters can be used, including space, and if the text string you have typed cannot be found then a message will be displayed. Note that Public responsive layouts have the globe icon.

3. Browse to the layout you wish to use and select it.

   The list closes and the layout is applied to the survey.

4.3.2. The Tips Overlay

The first time you log in and create a new survey, a "Tips" overlay is displayed. This overlay provides you with some basic information about the Survey Designer functionality, for example that the system does not have a **Save** button. This is because all the changes you make to the survey are saved automatically, and if you remember this feature you will save yourself much time looking for the button later!

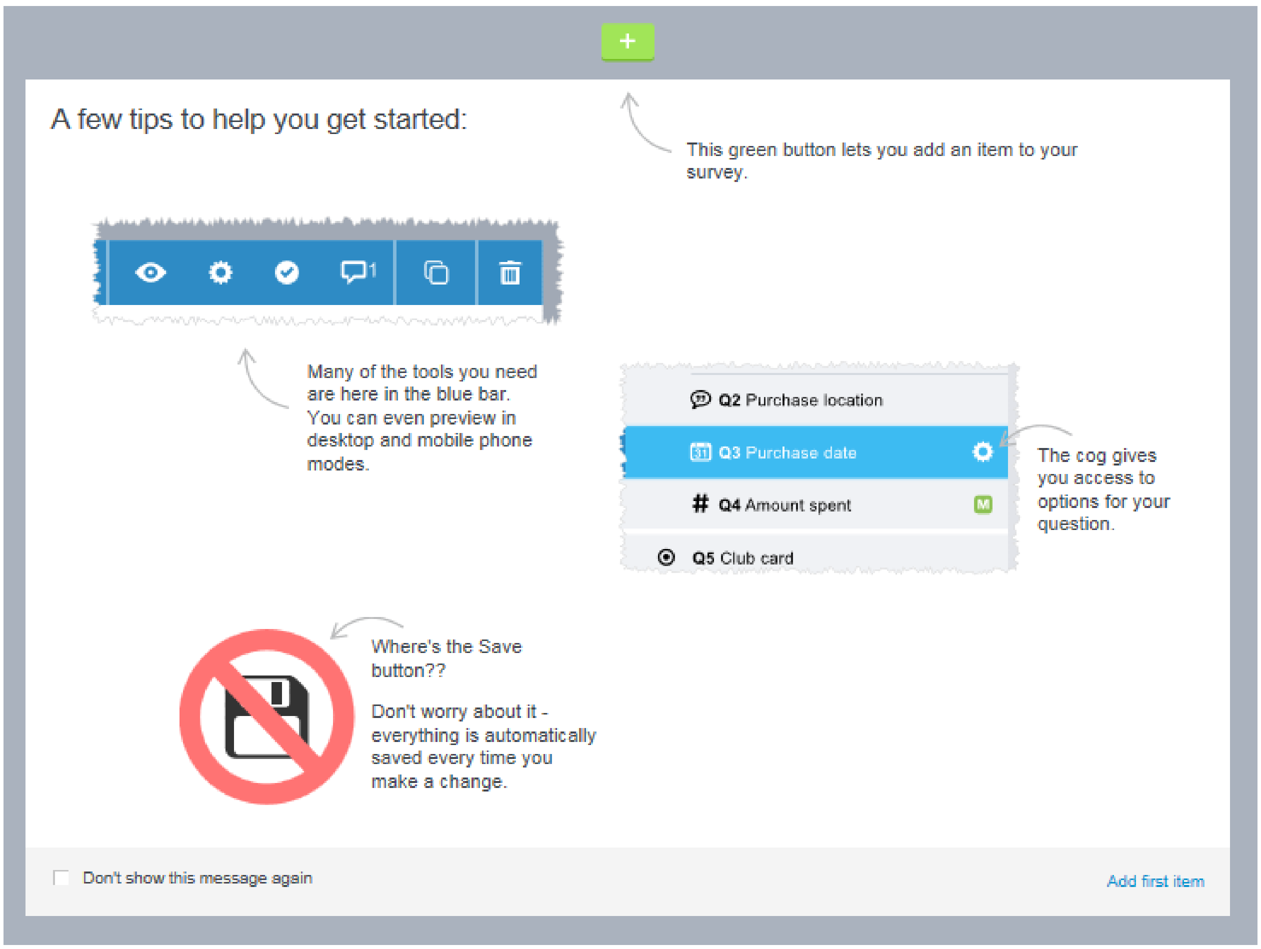


Figure 77 The Tips overlay

From here you can add your first item to the survey, by either clicking the green button above the overlay or by clicking the link in the lower-right corner; the Add Item overlay opens (see Item Types on page 64 for more information). If you do not with to see the tips overlay again, check the "Don't show this message again" box in the lower-left corner before you move on to building your survey.

4.4. Item Types

All the items that you can add to a survey are stored in and accessible from the Add Item overlay.

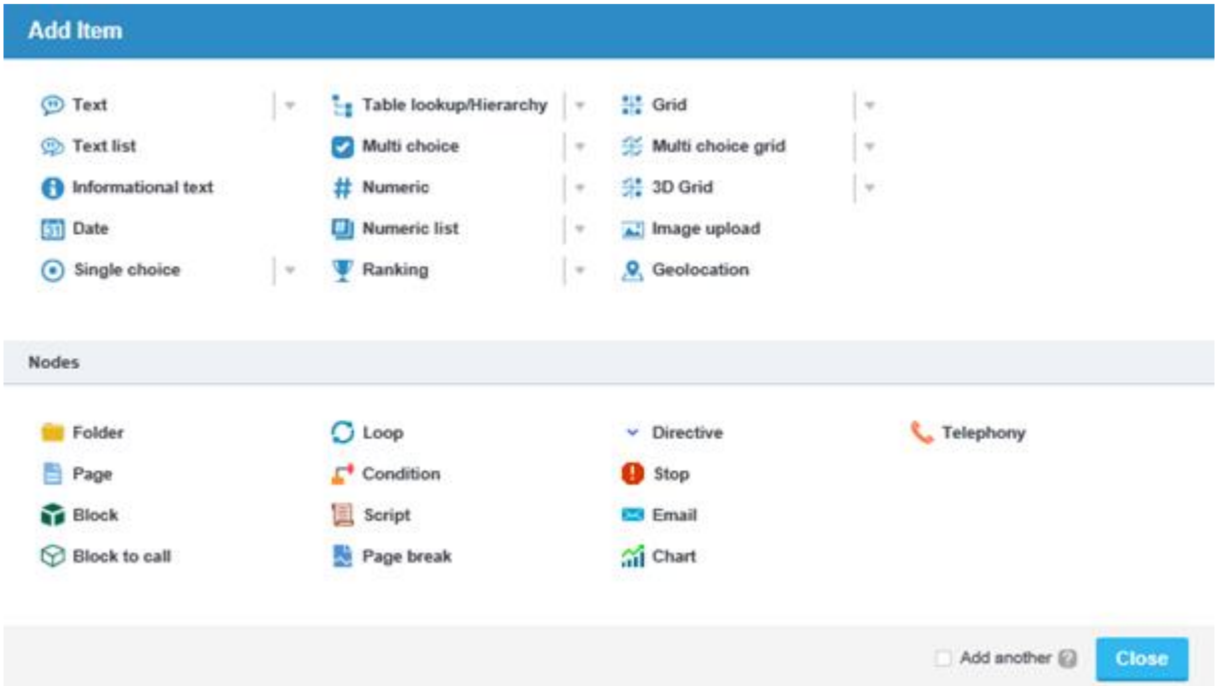


Figure 78 The Add Item overlay

The actual survey questions that can be presented to the respondent are those in the upper area, while the nodes in the lower area enable you to set up the survey to look and function as you wish. Click once on an item to add it to the survey. Note that you can click the down-arrow beside some of the items to open a list of the Appearance options for that item. You can then create that option type directly instead of having to change the Appearance option later.

4.4.1. The Text Item

The Text item is a “free text” field - it provides the respondent with a text field into which he/she can type their answer. This type of question would be used when asking the respondent for their name, for comments or explanations etc.

The question details page includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

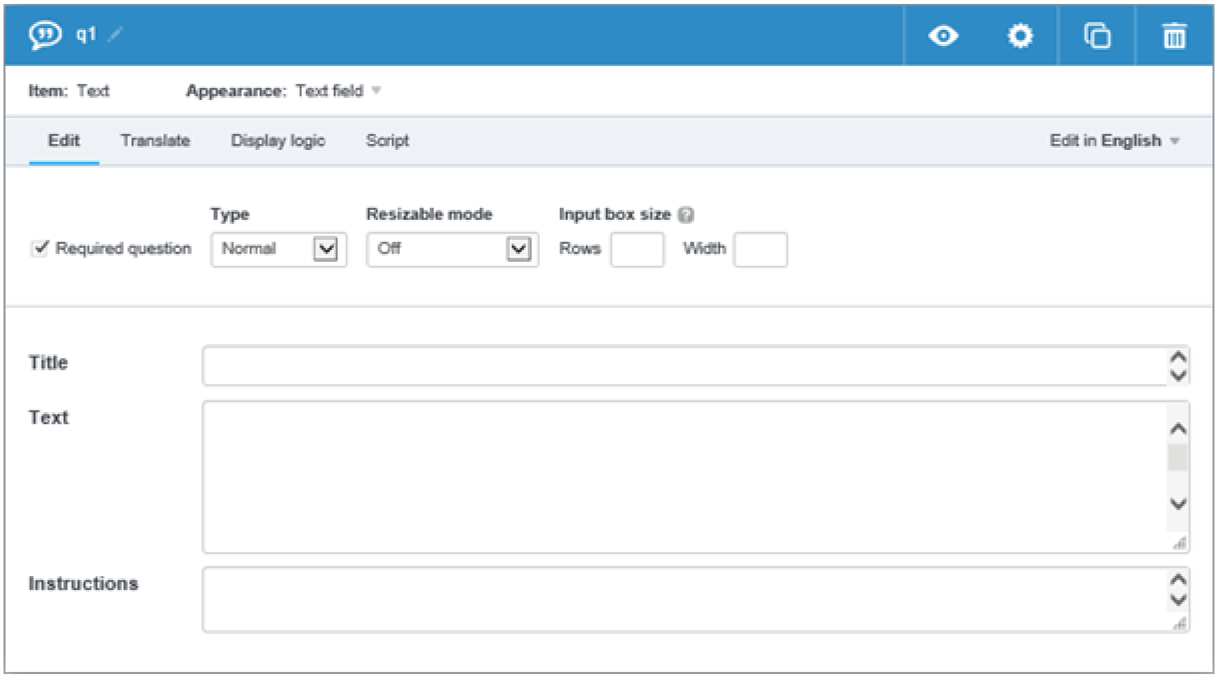


Figure 79 The Text item's question details page

A variation on this question type is the Text List item. This item provides the respondent with a list of answer options, and allows him/her to type 'free text' into a text field beside each option (see The Text List Item on page 65 for more information).

4.4.2. The Text List Item

A variation on the Text question type is the Text List. This item provides the respondent with a list of answer options, and allows him/her to type 'free text' into a text field beside each option. This can for example be used to ask for comments on a number of related items.

The question details page for this item includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

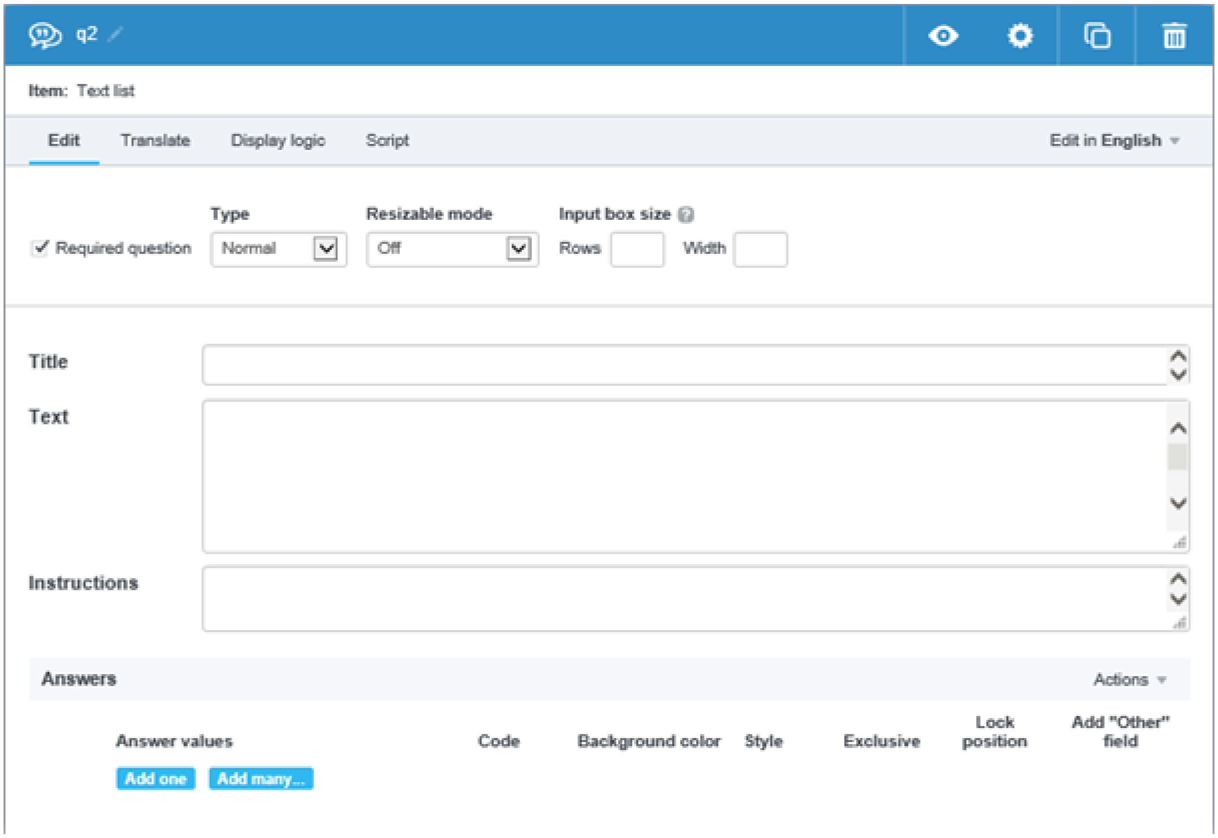


Figure 80 The Text List item's question details page

A Text List question requires an answer list (see Answers, Prompts and Scales on page 144 for more information).

4.4.3. The Informational Text Item

The Information Text item is used to display information text to the respondent. Typical uses would be to welcome the respondent to the survey, thank them for participating, or explain different survey sections.

The question details page includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

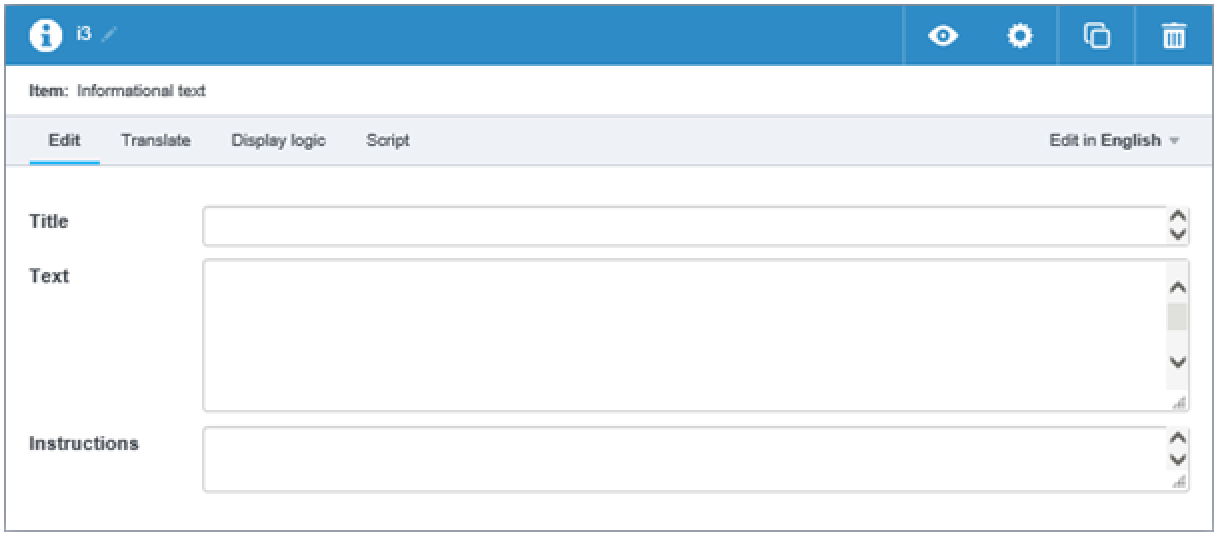


Figure 81 The Information item's question details page

- You can edit the question id. Click on the qid edit icon in the upper-left corner of the page to open the field and edit the qid as required. The qid displayed in the survey column is updated automatically.
- **Title -** the title of the item. The title appears in the survey designer column, and it functions as the heading for the item on the survey page in a web survey. It also appears as a descriptive label for the question when used in Reportal. The length of the title can be maximum 255 characters, otherwise it will be truncated. When a title is not provided, the Text will be used as a title.
- **Text -** the text you wish to present to the respondent.
- **Instructions -** here you can type in any descriptive instructions or comments you may wish to provide to the respondent.

4.4.4. The Date Item

A Date question provides the respondent with a field specially designed to hold a date. This could be used for example to ask for the respondent's date of birth, the date of a particular event etc.

The question details page includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

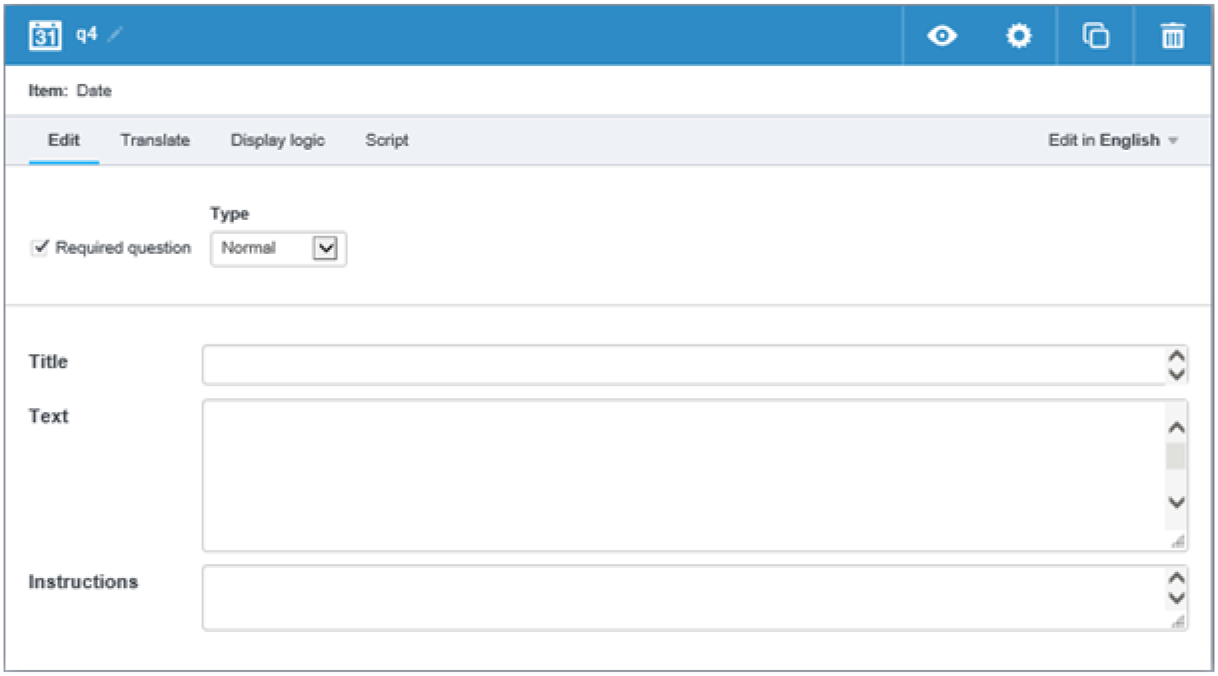


Figure 82 The Date item's question details page

When the respondent clicks on the date field button, a calendar opens enabling him/her to select the desired date. This ensures the format of the date input is correct.

Note: The format of the date displayed in the input field when the date picker has been used will depend on the standard format used in the language selected for the survey. For example, if the survey language is English (United Kingdom), the format is DDMMYYYY, while if English (United States) is chosen, the format is MMDDYYYY.

Note: When a date item is used in a survey, it will be available (as all other items) in the survey data. When editing the respondent data you will be able to select the date as a column and search for respondents based on the date.

4.4.5. The Single Choice Item

In a Single choice question, the respondent can select only one answer from a list of suggested answers. Examples of use could be asking for the respondent's gender or age group. In theory, the answer list can be of any size, however Confirmit recommends a maximum of 200 answers in the list.

The question details page includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

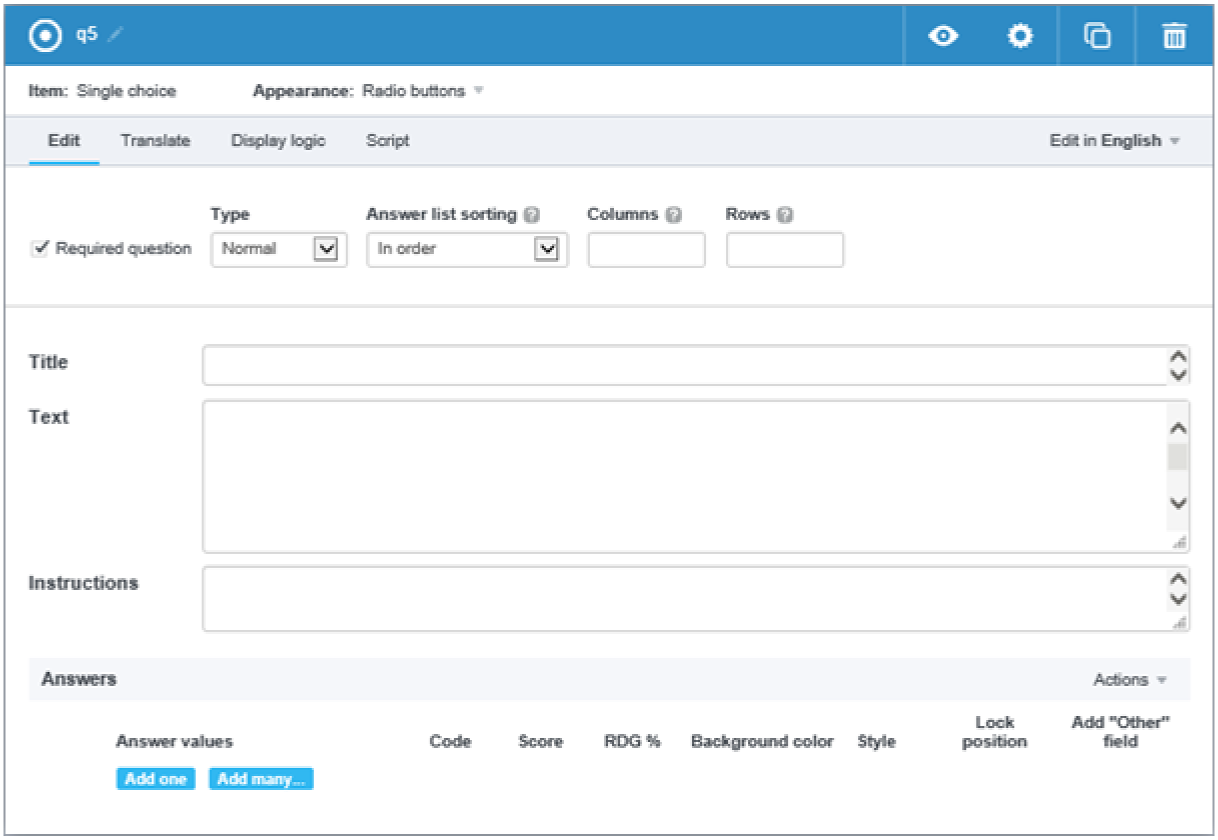


Figure 83 The Single choice item's question details page

4.4.6. The Table Lookup / Hierarchy Item

This is a special type of single question, which you can set up as either a table lookup question (see Table Lookup Questions on page 143 for more information) or as a hierarchy question (see Hierarchy Questions on page 143 for more information).

The question details page includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

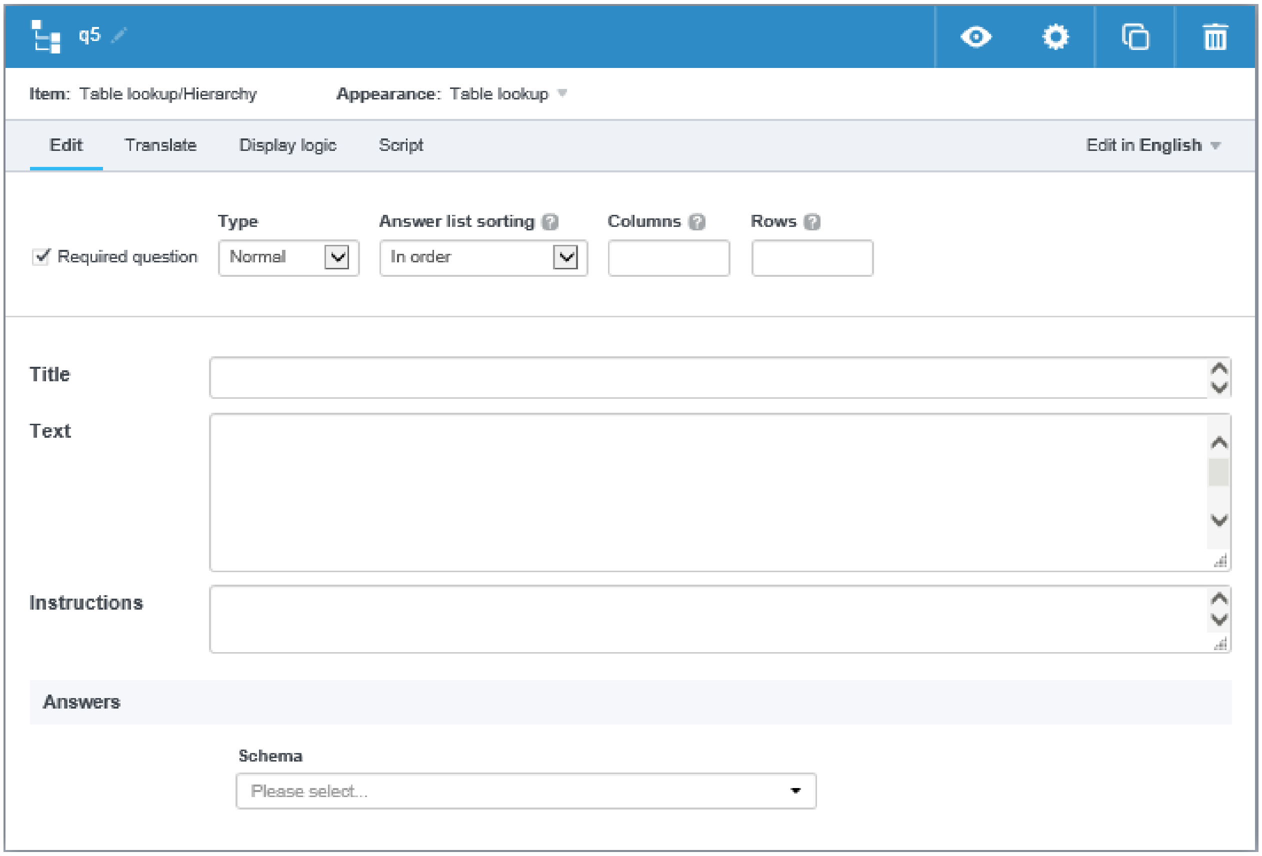


Figure 84 The Table lookup / Hierarchy item's question details page

4.4.7. The Multi Choice Item

With a Multi choice question, the respondent can select any number of answers from the answer list. This could for example be the types of products he/she has tested or heard about. The answer list can be of any size.

The question details page includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

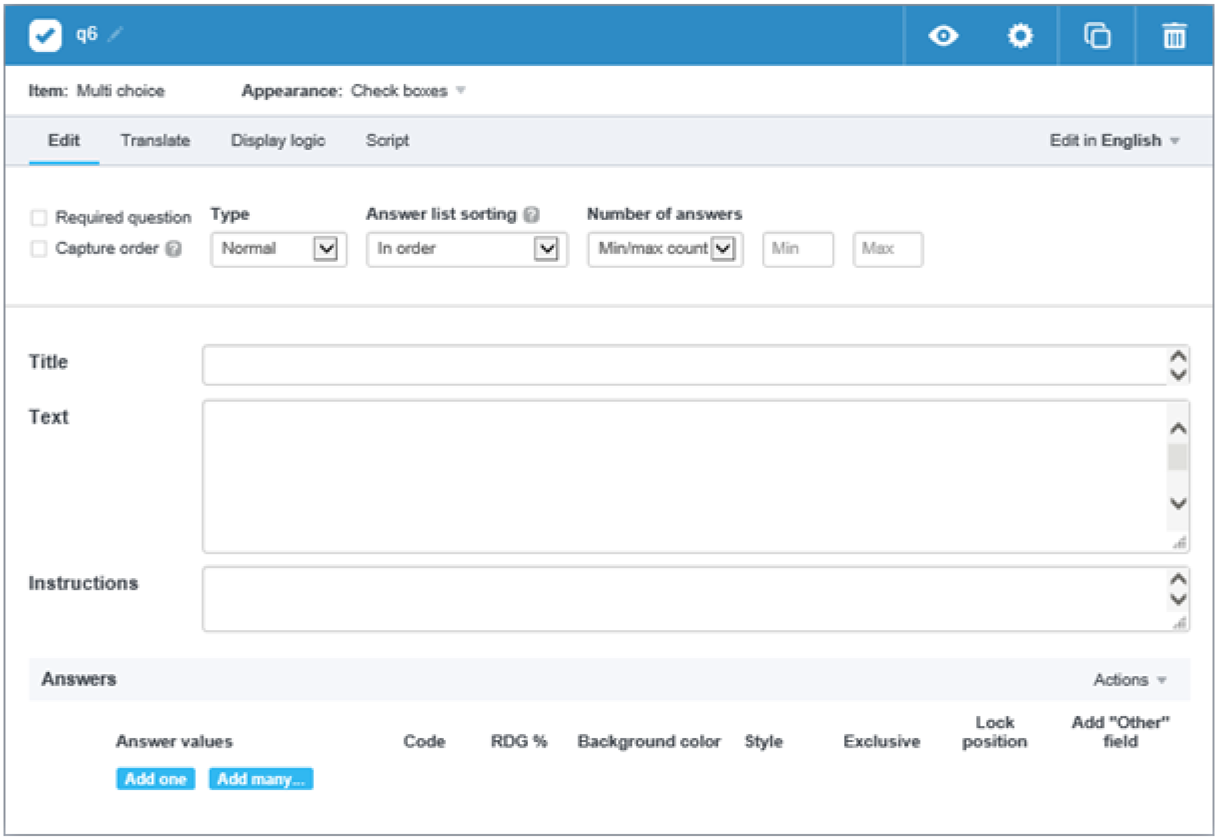


Figure 85 The question details overlay for a multi choice item

You can convert a Multi question to a Single, Ranking, Open Text List or Numeric List if you need to; to do so right-click on the item in the survey column and select **Convert to**. The various properties and settings available for this question are listed in the Properties page (see Question Properties on page 127 for more information).

4.4.8. The Numeric Item

A Numeric question is a “free text” question with a text field for numeric answers (non-numeric characters are not accepted). This type of question could be used for example when asking the respondent for a value or a quantity.

The question details page includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

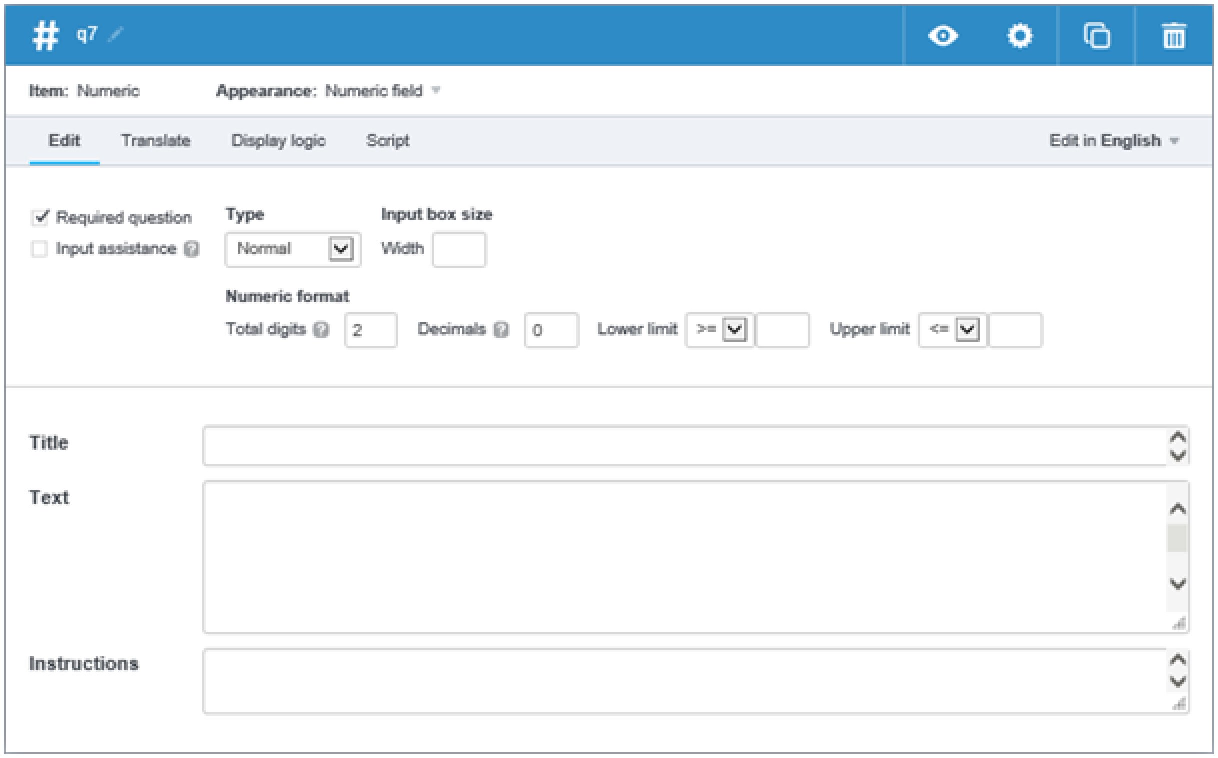


Figure 86 The Numeric item's question details page

You can convert a Numeric question to Open or Date if you need to; to do so right-click on the item in the Questionnaire Tree and select **Convert to**.

A variation on this question type is the **Numeric List** item (see The Numeric List Item on page 72 for more information). This item provides the respondent with a list of answer options, and allows him/her to type numeric information into a text field beside each option.

Note: For Numeric and Numeric List nodes, the default Column width of the respondent's input box is calculated from the constraints placed on the node by the Total digits, Decimals, Lower and Upper limit settings (see Question Properties on page 127 for more information). If these settings are altered then the default setting will be updated automatically when the survey is launched. The default setting will be overridden if you type a specific value into the Column field.

4.4.9. The Numeric List Item

A variation on the Numeric question type is the Numeric List. This item provides the respondent with a list of answer options, and allows him/her to type numeric values into a field beside each option. This can for example be used to ask for quantities or values for several related items.

The question details page includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

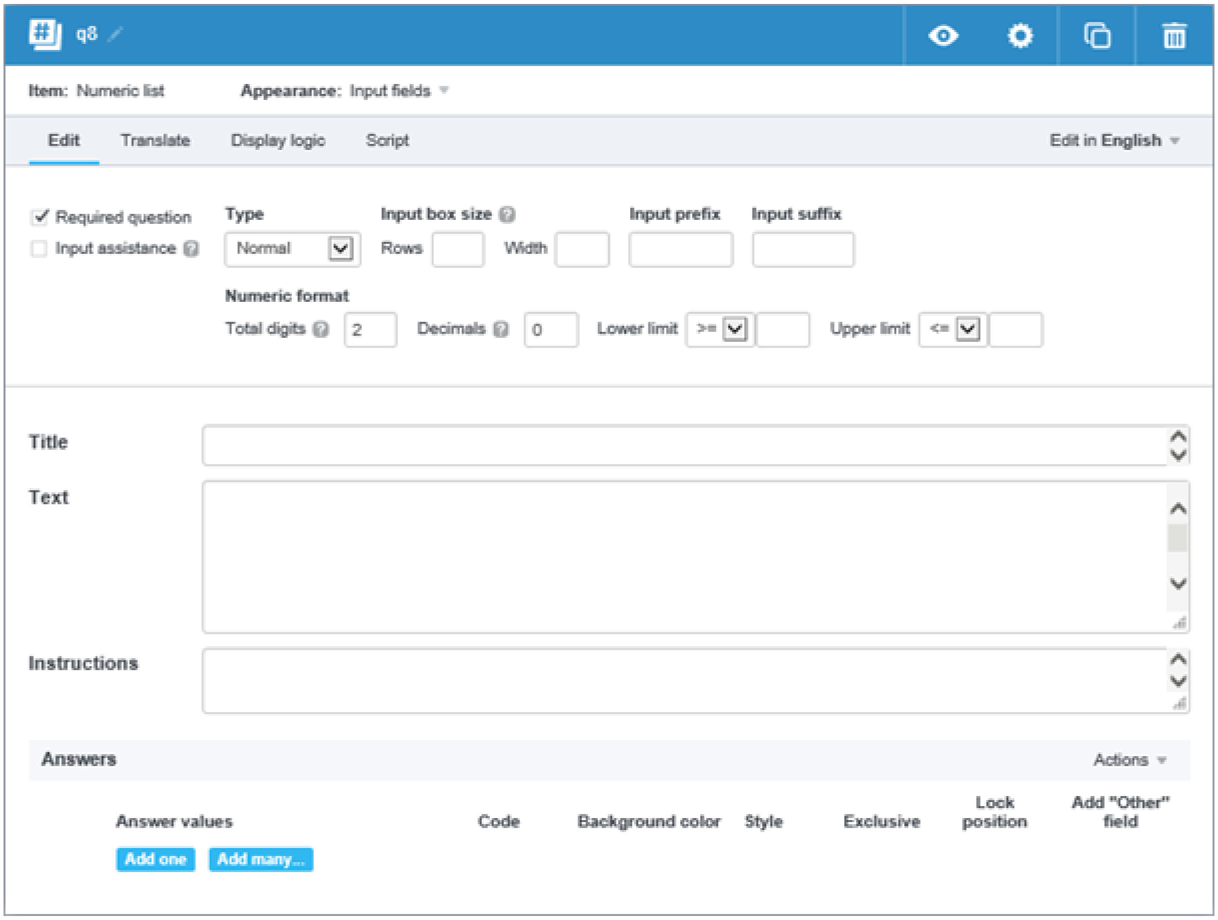


Figure 87 The Numeric List item's question details page

You can convert a Numeric List question to a Single, Multi, Ranking or Open Text List. To do this, right-click on the item in the survey, select **Convert to**, then select the question type you require.

Note: For Numeric and Numeric List nodes, the default Column width of the respondent's input box is calculated from the constraints placed on the node by the Total digits, Decimals, Lower and Upper limit settings (see Question Properties on page 127 for more information). If these settings are altered then the default setting will be updated automatically when the survey is launched. The default setting will be overridden if you type a specific value into the Column field.

4.4.10. The Ranking Item

A Ranking question presents the respondent with the list of answer options which they are asked to rank or grade, giving the answers a score from 1 to the total number of answers.

The question details page for this item includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

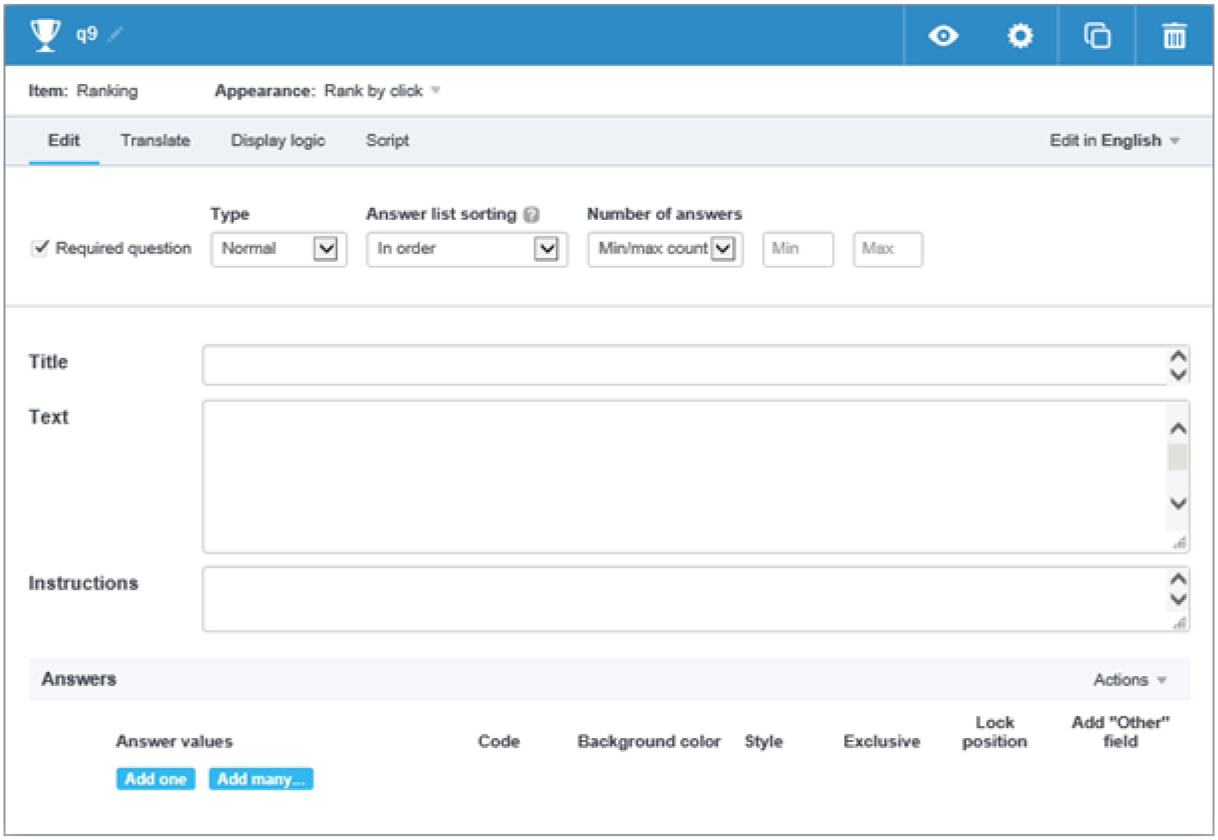


Figure 88 The Ranking item's question details page

A Ranking question requires an answer list (see Answers, Prompts and Scales on page 144 for more information).

You can convert a Ranking question to a Single, Multi, Open Text List or Numeric List if you need to. To do so, click the overflow menu icon for the ranking question in the Survey column and select the desired question type from the list.

4.4.11. The Grid Item

A Grid question is a number of related questions presented in tabular format, where the respondent can select an answer for each question from a scale. The scale - the list of answer options - will be the same for each question in the grid. This type of question is typically used to give products or statements a rank or score.

The question details page for this item includes a number of fields and property options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

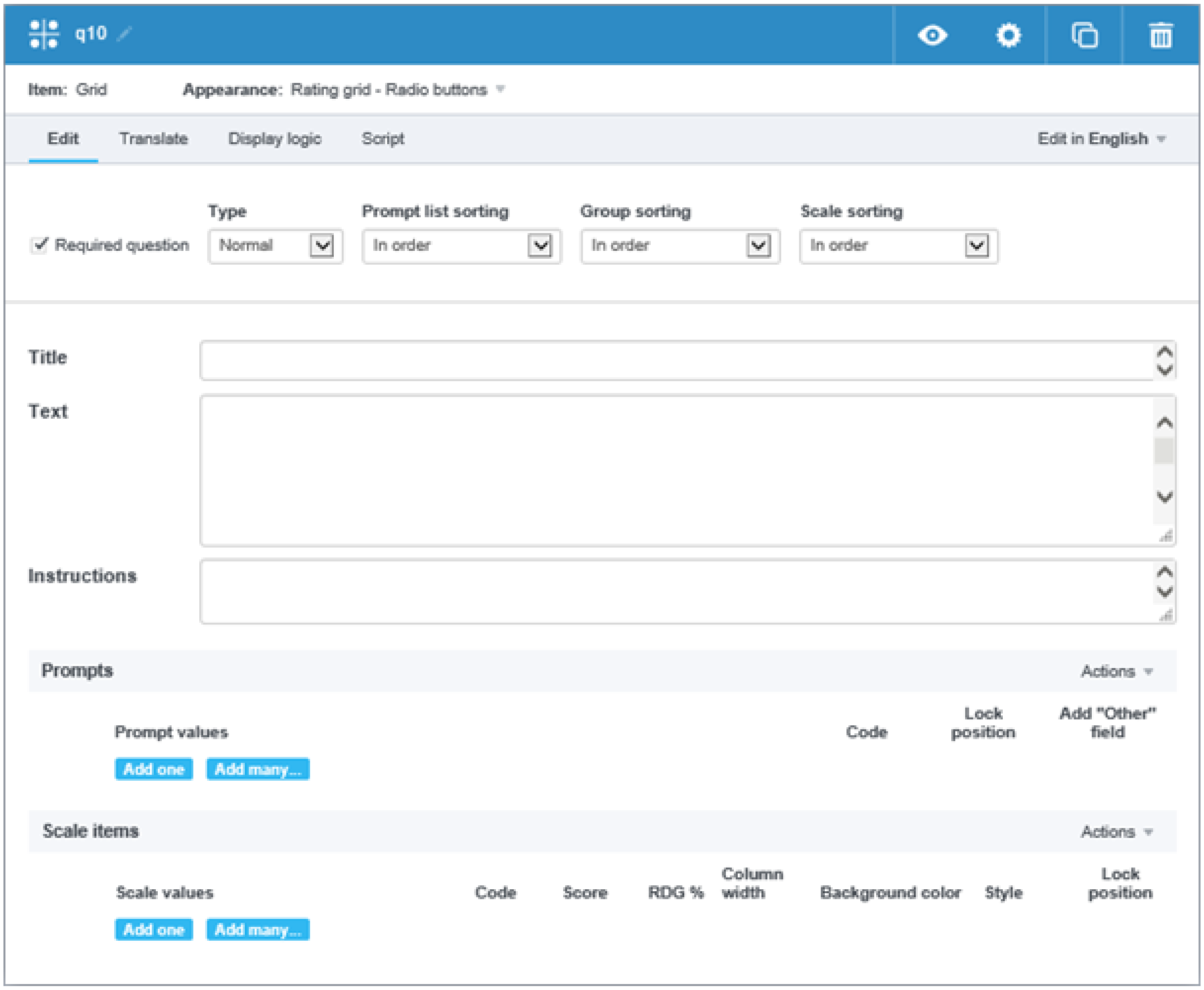


Figure 89 The Grid item's question details page

- **Prompts -** these are the questions presented to the respondent. The grid can contain any number of prompts.
- **Scale -** these are the answer options that the respondent can select between. Note that the same scale will be used for each question in the grid.

A variation of the Grid item is the 3D-Grid (see The 3D Grid Item on page 77 for more information).

4.4.12. The Multi Choice Grid Item

The standard 3D-grid item has multi questions as the columns. It is therefore normally inadvisable to use the standard 3D-grid in surveys that are intended for mobile responses, as the rendition may cause problems for the respondent.

The Multi Choice Grid item is a 3D-grid item in which the Multi questions are the rows of the grid instead of the columns – it is effectively a transposed 3D-grid. The Multi Grid item is supported in all rendering modes; desktop, mobile, CATI and CAPI.

The question details page for this item includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

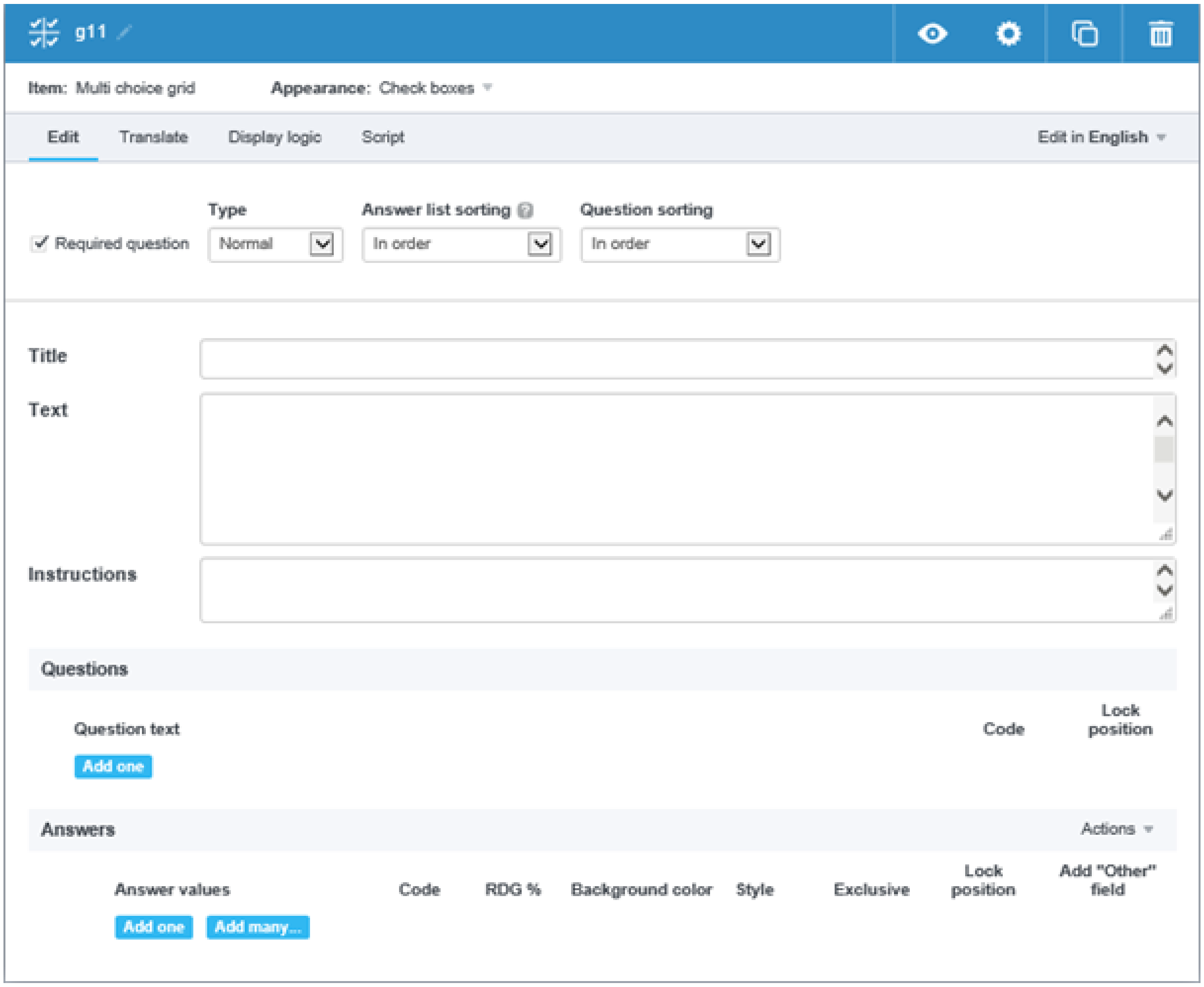


Figure 90 The Multi choice grid item's question details page

Note that this question's Type is always "Normal" and this cannot be changed. This means that a Multi choice grid cannot be set to for example Hidden or Background.

Outside of Authoring, (in Reportal, Data Editing/Exporting, Data Processing etc…) this node appears as a clickable node that expands to the individual multi questions contained within the grid. There is no special handling of the Multi Grid question types in Reportal; it behaves the same as a 3D grid containing multis. From a data perspective, Multi Grids are treated as a set of individual multi questions.

The naming convention used for the labeling is:

Multi Grid question id + underscore + code in the "questions" list.

For example; if the Multi Grid is "g1", the underlying multi questions in the multi grid are "g1_q1", "g1_q2", "g1_q3" etc. and the answer codes are 1, 2, 3, etc. then the columns in the database for the individual answers will then be:

g1_q1_1, g1_q1_2, g1_q1_3 …

g1_q2_1, g1_q2_2, g1_q2_3 …

g1_q3_1, g1_q3_2, g1_q3_3 … etc.

The Multi Grid item supports the following question/answer properties and options:

- Order of the questions/answers (rows/columns)
- Keep position for questions (rows)

- Exclusive answers (columns)
- Other answers (these appear in the column headers)
- Answer buttons (Advanced WI setting)
- Column, row and question masking
- Can be used in the condition builder
- Repeat headers (entry of answer Others is only possible in the first header row)
- Bottom headers (entry of answer Others is only possible in the first header row)

The following functionality is not supported:

- Answer group support
- Loop reference lists

4.4.13. The 3D Grid Item

A 3D grid item allows you to combine various question types into one item with a grid layout, thus enabling a more compact rendering. In a 3D Grid, all questions share the same answer list.

The question details page for this item includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

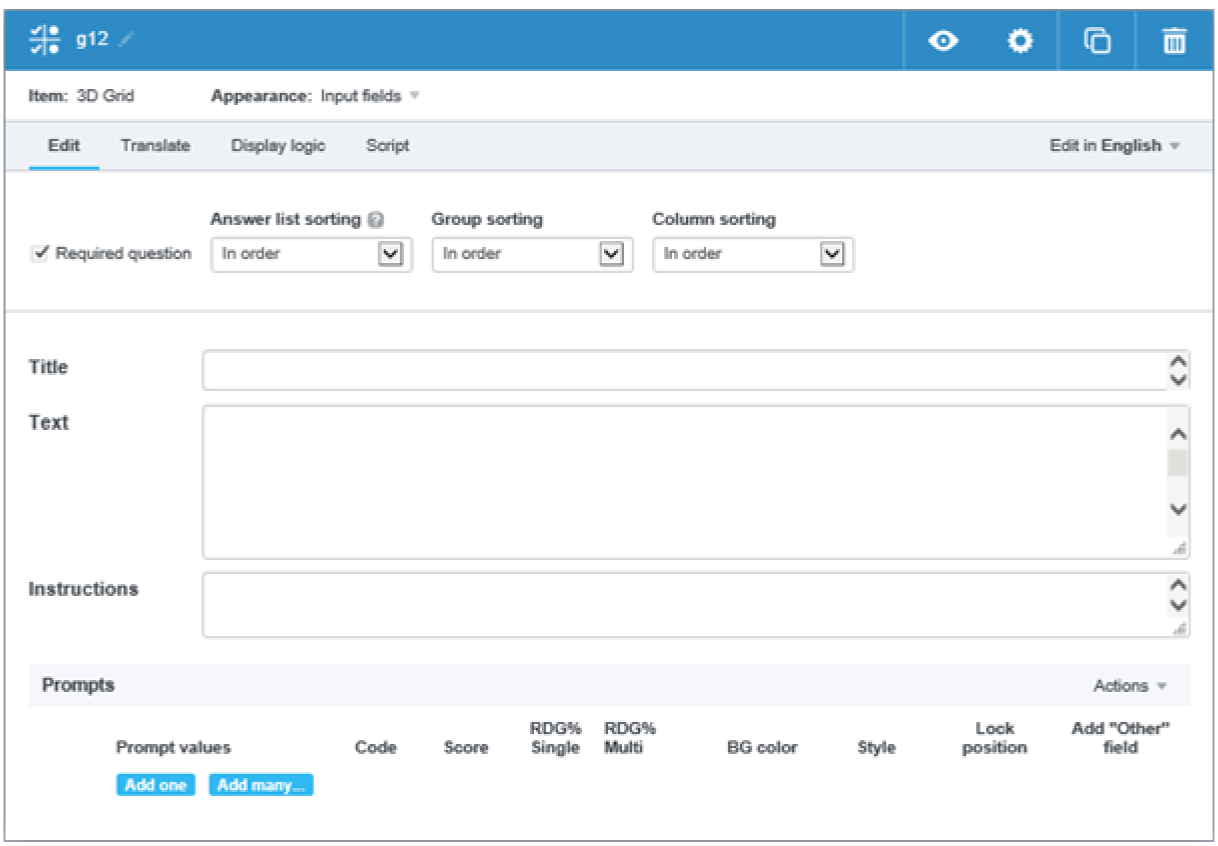


Figure 91 The 3D Grid item's question details page

To add a question into the 3D Grid item, click the green **+ Inside** button above or below the overlay. The 3D grid item can contain the following question types:

- Single.
- Multi.
- Grid.
- Ranking.
- Open text list.
- Numeric list.

Note: The standard 3D-grid item has multi questions as the columns. It is normally not advisable to use the standard 3D-grid in surveys that are intended for mobile responses as the rendition may cause problems for the respondent. In this situation the Multi Grid can be used (see The Multi Choice Grid Item on page 75 for more information).

4.4.14. The Image Upload Item

The Image Upload item allows respondents to upload an image as the answer to a question. Note that the item will only accept image files.

The question details page for this item includes a number of fields and options. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

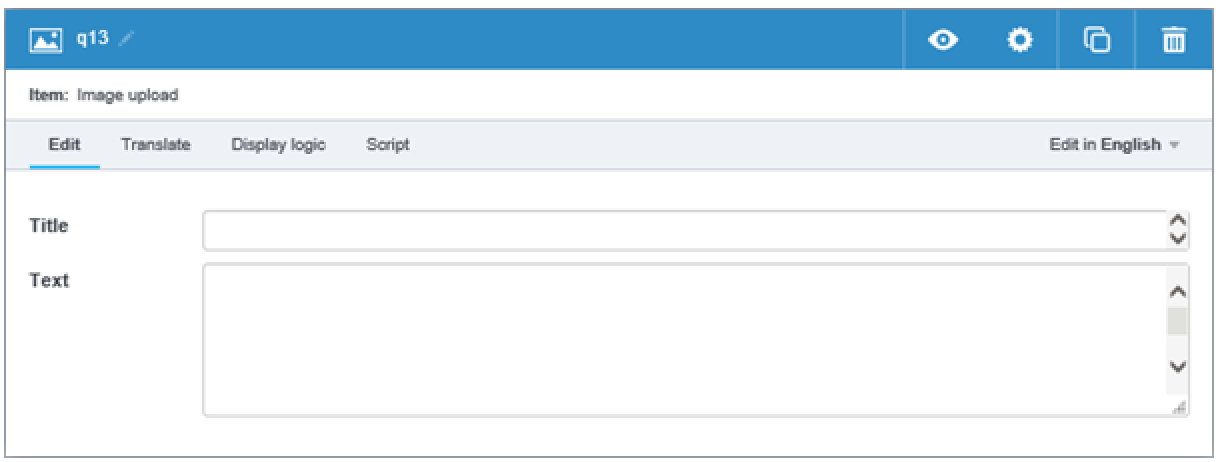


Figure 92 The Image Upload item's question details page

Set up the question title and text as for any other question.

When the respondent arrives at this question, he/she can then browse to the image he/she wishes to upload. Photos can only be uploaded on supported devices and browsers. When uploaded, the image will automatically be rescaled to 640 x 480 pixels, maintaining the aspect ratio. Images over 200kb in size cannot be uploaded. These limits are coded into the application and are set so that the respondents don't experience delays.

The image is uploaded to the server on which the survey is located. When the respondent can see the thumbnail image in the question, the image is finished uploading. Only one image file can be uploaded in an item; if the respondent attempts to upload a second file, the first will be overwritten.

Note that a number of restrictions apply:

- This functionality is not supported for Internet Explorer versions less than 10.
- This functionality is not supported on Windows phone devices.
- The Image Upload question type is never mandatory.
- No scripting check is run to check whether the device is supported, and there is no fallback mode.

- Images can be exported as ZIP files, set via Survey Data export for delimited text file exports.

Note: If you are using the required version of Internet Explorer (for details, refer to the Confirmit Horizons System Requirements document that is available on the Confirmit Extranet) but your browser is emulating an earlier version, the Image Upload functionality will not run. In this case you must enable the "Use newest available version of IE rendering" property in the theme that you are using.

4.4.15. The Audio Capture Item

Note: For this item to be available for use in a survey, the CAPI Kiosk or AskMe channels must be enabled for the survey.

The Audio Capture item allows respondents to upload an audio file as the answer to a question. Note that the item will only accept audio files.

The question details page for this item allows you to set a minimum and a maximum length for the recording, in seconds. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

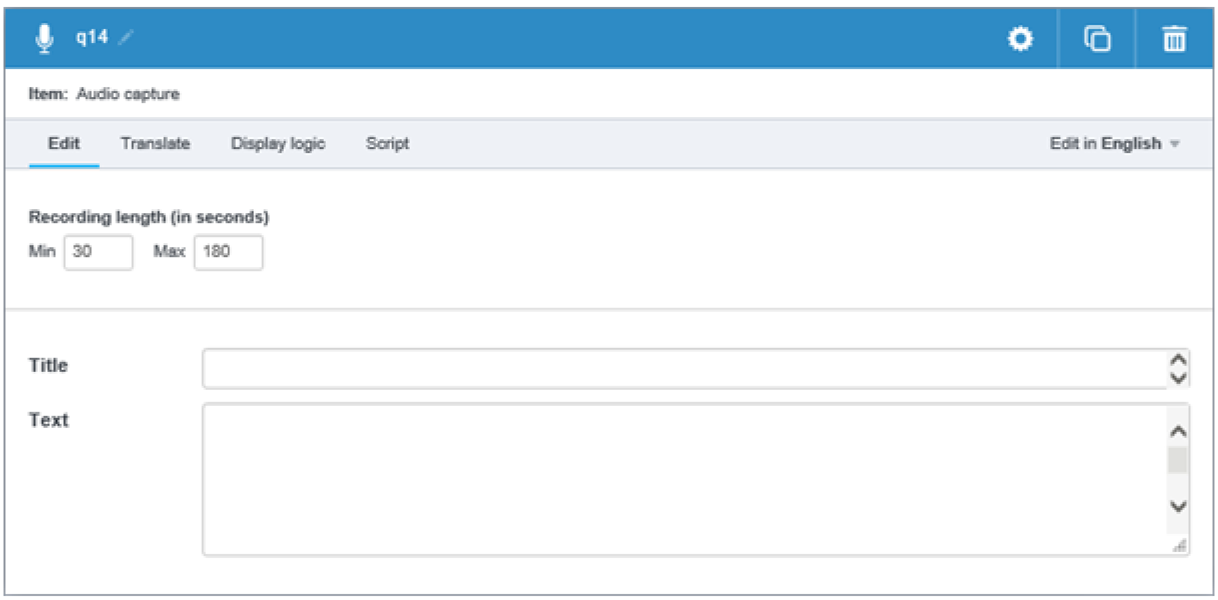


Figure 93 The Audio Capture item's question details page

Use the Text field to tell the respondent how to respond to this question.

4.4.16. The Video Capture Item

Note: For this item to be available for use in a survey, the CATI, Kiosk or AskMe channels must be enabled for the survey.

The Video Capture item allows respondents to upload a video clip as the answer to a question. Note that the item will only accept video files.

The question details page for this item allows you to set a minimum and a maximum length for the recording, in seconds. All the properties available for this question type are described in the Question Properties section (see Question Properties on page 127 for more information).

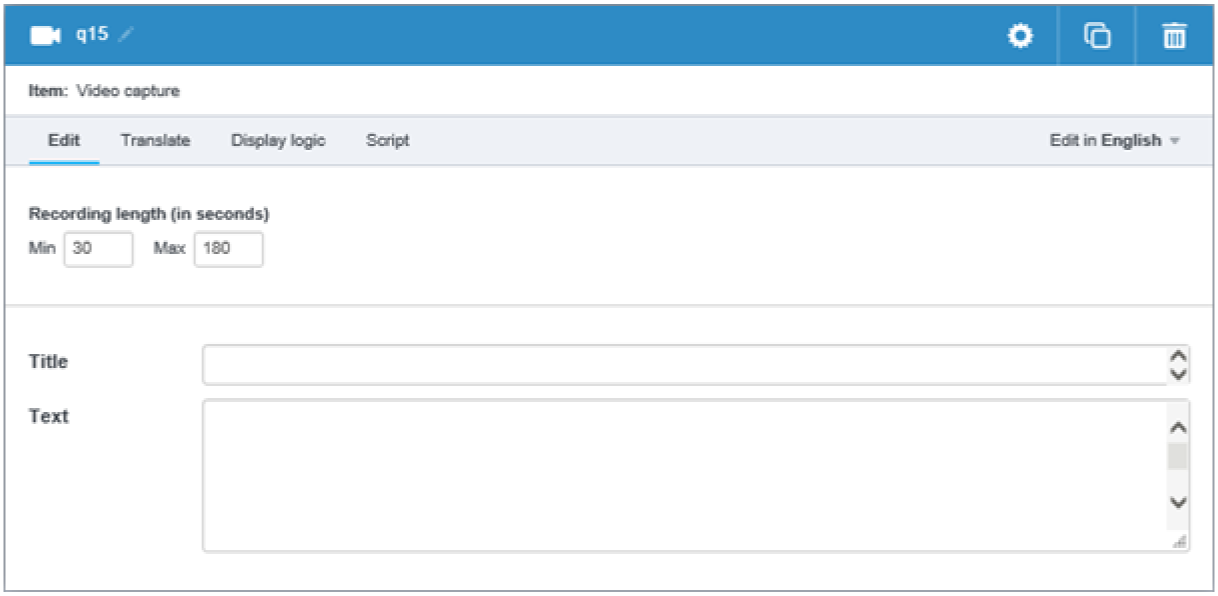


Figure 94 The Video Capture item's question details page

Use the Text field to tell the respondent how to reply to this question.

4.4.17. The Geolocation Item

Note:
1) To capture this data, a minimum of Internet Explorer 9, Firefox 3 or any WebKit-based browser is needed.
2) For respondents using Internet Explorer, the survey layout must use the newest available version of Internet Explorer rendering. Existing layouts will be rendered as Internet Explorer 7 compatible HTML, and in this mode geolocation functionality is not available. To avoid the Internet Explorer 7 compatibility checkbox, the "Use newest available version of IE rendering" should be checked in the Survey Layout's theme property (in SurveyPageMasterSheet).

The Geolocation node is used to capture the longitude and latitude values (the global location) of the respondent's browser.

The question details page for this item includes a number of fields and options. All the properties available for this question type are described in the Question Properties section.

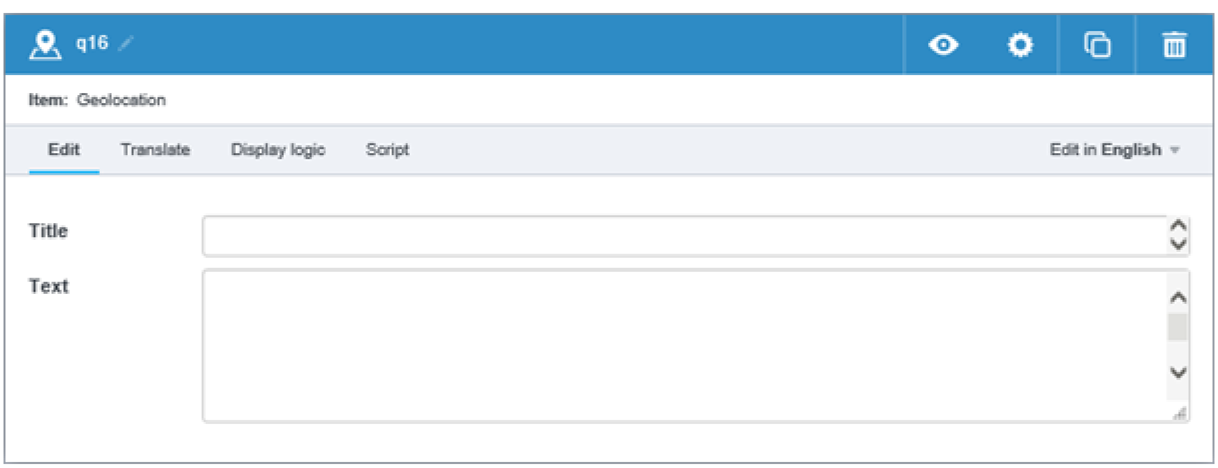


Figure 95 The Geolocation item's question details page

The location data is retrieved from the respondent's browser client geolocator item. When the respondent passes the geolocation item in the survey, the respondent will normally be requested to confirm that the web page is allowed to access this location data (this request is beyond Confirmit's control and it cannot be disabled). The respondent must confirm the access before the data can be copied. If the respondent refuses access, or if JavaScript is disabled, the geolocation data value for this respondent will be blank.

The Geolocation item acts basically in the same way as a "hidden" question, but in this case the item must go to the respondent's browser to gather the information (normal hidden questions do not do this). The item will be "carried" to the browser by attaching itself to the next interactive question that is sent (that is, the next question collecting interactive data, for example a single, multi, numeric etc...). The location data will therefore only be submitted to the server when the page carrying the next interactive question is posted back to the server. In the event the next interactive page is some distance later in the survey, the respondent may have left the survey, been screened for some reason etc. before the location data is returned, and the data will then be lost. It is therefore recommended that a Geolocation item is placed on the same page as the next interactive question.

You can add a question text to a Geolocation item. Then, if the Geolocation item is followed by something that results in a page break appearing before the next interactive question, the item will act as an "Info" node and will display the item's question text along with the Confirm and Deny buttons.

In the Random Data Generator, Geolocation items will be assigned random data within the valid geopoint coordinate range. Reporting and Rapid Results will treat this item as if it were an Open Text node.

Note that the Geolocation item has the following limitations:

- It is not supported by Panels.
- It is not supported by Express surveys.
- It is not supported by the Doc2Survey functionality.

A geolocation item value for a respondent cannot be edited in Authoring, and the item will not be visible in the left tree view under **Survey Data > Edit** (refer to the Authoring User Guide for further details). The value can however be viewed in the Edit page's lower-right frame once the respondent has been selected.

4.4.18. The Folder Node

Use folders to organize your survey in the same way as you organize the files in your computer. For example you could put all demographic questions into one folder. Folders simplify moving a set of related items around within the survey as when you move a folder, all the items inside the folder will also be moved.

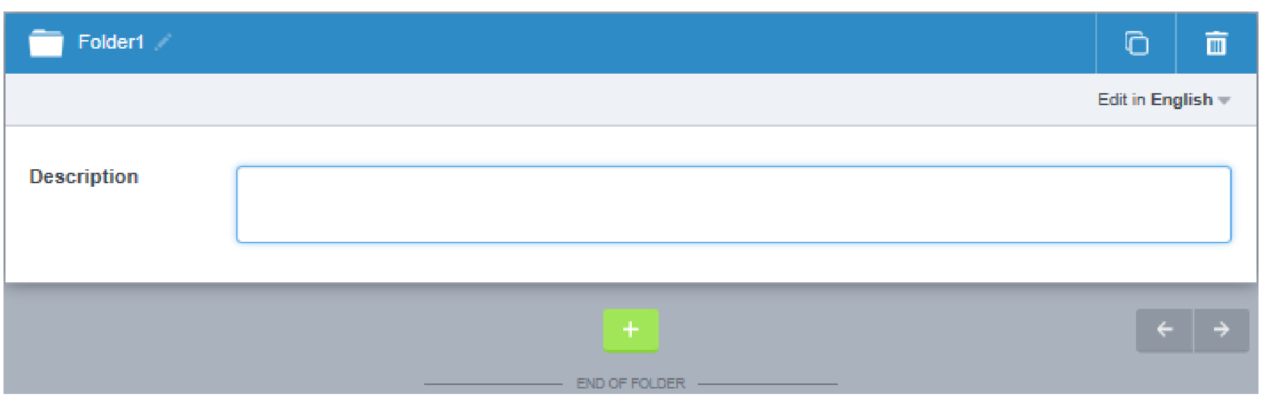


Figure 96 The Folder node's details page

The qid in the upper-left corner of the details page is the name of the folder - you can edit this as required, and you can add a description for future reference.

To create an item inside a folder, click the green **+** button above the END OF FOLDER line to open the Add Item overlay (see How to Add Items to the Survey on page 93 for more information), or you can drag and drop items into the folder in the Survey column - point to the folder icon when dropping the item. Adding a description for the folder will simplify editing of the survey later.

4.4.19. The Page Node

The Page node enables randomization and rotation of questions within a page, and enables you to specify themes and/or page layouts for specific pages. Items that will cause a page break, for example conditions, loops and blocks, are not allowed within a Page. You can also use dynamic answers within pages, enabling parts of the page to be updated based on responses to one or more questions on the same page (see Dynamic Answers on page 153 for more information).

Pages can be used inside Blocks, and in combination with Question masking if there are some questions that are to be displayed only under certain conditions.

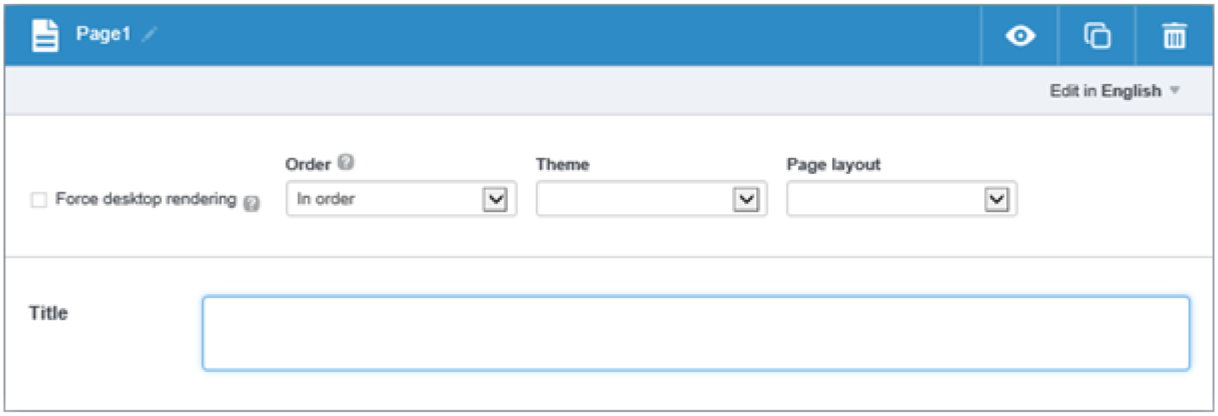


Figure 97 The Page node's details page

The qid in the upper-left corner of the details page is the name of the page - you can edit this as required, and you can add a title for future reference.

To create an item inside a page, click the green **+ Inside** button above or below the page to open the Add Item overlay (see How to Add Items to the Survey on page 93 for more information), or you can drag and drop items into the page in the Survey column; point to the page icon when dropping the item. Adding a description for the page will simplify editing of the survey later.

- **Name** - the name of the page node. This name appears in the survey column. You can rename the page node as required.
- **Force desktop rendering** - if the survey is set to allow Touch rendering on iPhone or Android phone, check the box to override Touch rendering for the contents of just this page. This applies to Touch (iPhone or Android phone) only; generic rendering is still generic rendering.
- **Order** - the order in which the elements in the page are to appear. The options are: In Order, Randomized, or Rotated.
- **Theme** - select the theme to be used for this page. If no theme is selected, the default theme for the questionnaire is used.
- **Page layout** - select the page layout to be used for this page. If no layout is specified, the default layout for the questionnaire is used.

4.4.20. The Block Node

Block nodes are elements that enable you to group questions and other items together such that the grouped items can be processed specially or separately within the survey. Several types of Block element are available in Horizons:

- The Block element within the survey enables you to group questions together and apply for example randomization or rotation to the questions within the block. This is standard survey functionality that is used frequently in market research to avoid bias in responses, which can arise as a result of the order in which the questions are presented. Add questions and nodes to the block by clicking the green **+ Inside** button above or below the overlay. In addition to normal questions, Blocks can contain complex structures such as conditions and loops, and it is also possible to nest Blocks. The Blocks will have single page breaks.

Figure 98 The Block node's details page

- The Call Blocks folder in the survey column allows you to set up groups of questions outside of the survey, and call these blocks when they are required. Click the **Call blocks** icon to open the Call blocks column. The column contains a Start block and an End block as default (see below for details), and you can add any number of Call blocks to the column by clicking the green **+ Call block before/after** buttons as required. Call blocks are then called to the survey by Block to call nodes (see The Block to Call Node on page 84 for more information).

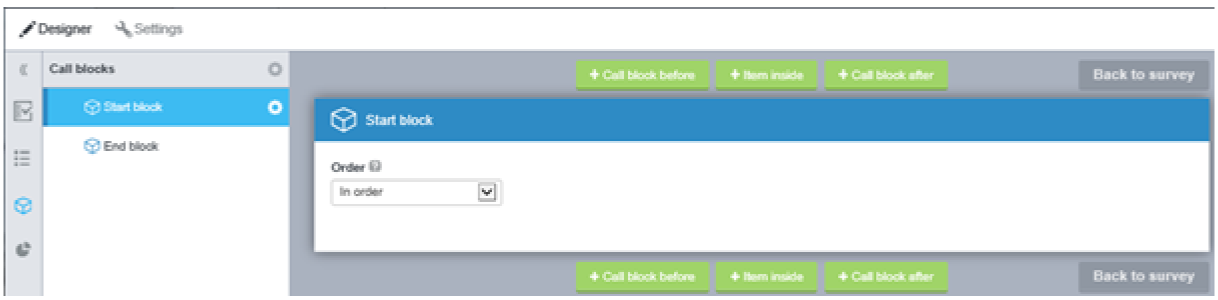


Figure 99 The Call Blocks folder

- Call blocks are similar to the blocks described above and are intended to contain individual questions or sets of questions, but they are not part of the standard survey. This means that these blocks and their contents will not be executed automatically when a respondent answers the survey, but must be activated by a Call Block item placed in the survey. When the respondent works their way through the survey and they come to a Call Block item, the Call Block will divert the survey flow to the specified Block. Once the contents of the Block have been processed, the survey will return automatically to the point immediately after the Call Block, and the survey will continue. Any number of Call blocks can be added to the survey. These can be called at any time during the survey, and the same Block can be executed any number of times by different Block To Call nodes in the survey. For the questions inside the block, any answers entered during previous executions of the block will remain. The Block To Call nodes can themselves be activated by for example scripting within other questions in the survey.

Note: The use of scripted Redirect() to jump into or out of questions that are in Call Blocks will cause problems and should not be attempted. A key attribute of Call Blocks is that they can be entered from multiple points in a survey (see above), so the survey engine will not have a specific "entry-point" that has been used to enter that Call Block. Therefore when the Call Block finishes it does not know where in the main body of the survey to return to, and the survey will simply error.

- A Start block is a special type of block that will ALWAYS be activated at the beginning of a survey. Any questions or other items located within the Start block will always be the first things that are processed when the respondent starts the survey. The Start block will be presented to the respondent whenever he/she enters the survey for first time, and whenever the respondent returns to the survey after a postponement unless the option "Allow respondents to change their original answers" is disabled. On returning to the survey, the Start block will present the answers that the respondent has entered previously, and the respondent can then change those answers as required. A Start block cannot be deleted from the survey. If no questions are added to the Start block, then it will be ignored.

- An End block is a special case block that will ALWAYS be activated at the end of a survey. Any questions or other items located within the End block will always be the last things that are processed when the respondent completes the survey. The questions contained within the End block will be presented to the respondent whenever he/she leaves the survey, either due to postponement or because the survey is completed. If the respondent returns to the survey later, and again leaves it for any reason (perhaps this time the survey is completed), then the questions in the End block will present the answers that the respondent has entered previously, and the respondent can then change those answers as required. An End block node cannot be deleted from the survey. If no questions are added to the End block then it will be ignored.

Important
Background variables only have "values" once the respondent has passed them in the survey (and provided the necessary answers). Until this point, the variables are regarded as being empty if they are used in text substitution or scripting. Special care must therefore be taken when creating surveys that include a Start Block if background variables are needed in the Start Block. The background variables MUST then be placed at the beginning of the Start Block such that they are passed first when the interview opens.

4.4.21. The Block to Call Node

A Block to call node is used to call or activate a Call block (see The Block Node on page 82 for more information). You can place a Block to call node anywhere within the survey. When the respondent works their way through the survey and reaches the node, the node diverts the routing to the specified Call block and the questions within that block are presented to the respondent. Once the respondent has answered the questions in the selected block, he/she is returned to the survey, to the point at which they left it to process the block, and can then continue with the survey.

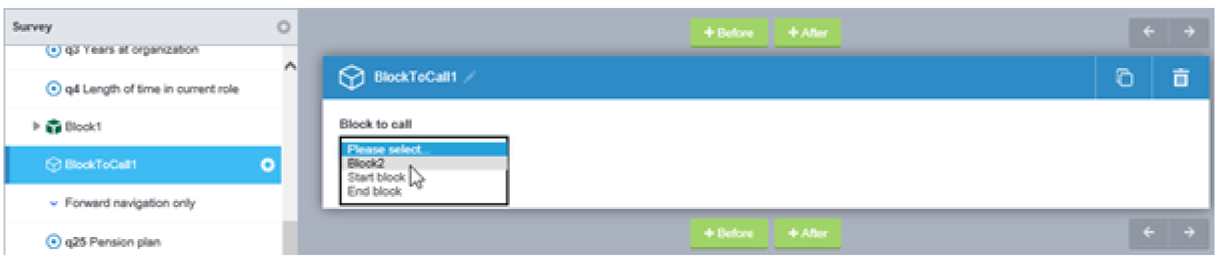


Figure 100 The Block to call node

Click the down-arrow button to open a drop-down list of the blocks that are available in the Call blocks column, and select the block you wish to call.

You can add as many Block to call nodes as you wish to a survey. These nodes can refer to any Call block, and can specify the same Call block more than once.

4.4.22. The Loop Node

A loop is a special type of folder, where the questions inside the loop will be repeated for a number of iterations.

You may want respondents to provide feedback on a number of items (a list of products perhaps), using the same questions for each item. To do this, you put the questions inside a Loop. If the respondent has previously selected the items from a longer list, then you can base the loop on the items the respondent has selected. When the respondent reaches this question, the survey will ask the same questions for each item that the respondent has selected, and will move on to the next question once it has received answers for each item.

For example, assume you wish to repeat a block of questions for a list of car makes. Instead of defining the same block of questions for each car, only replacing the car name for each block, you can simply create a loop that iterates through the list of cars asking the same question(s) for each (see How to Create a Loop on page 174 for more information).

You can also use nested loops (loops within loops).

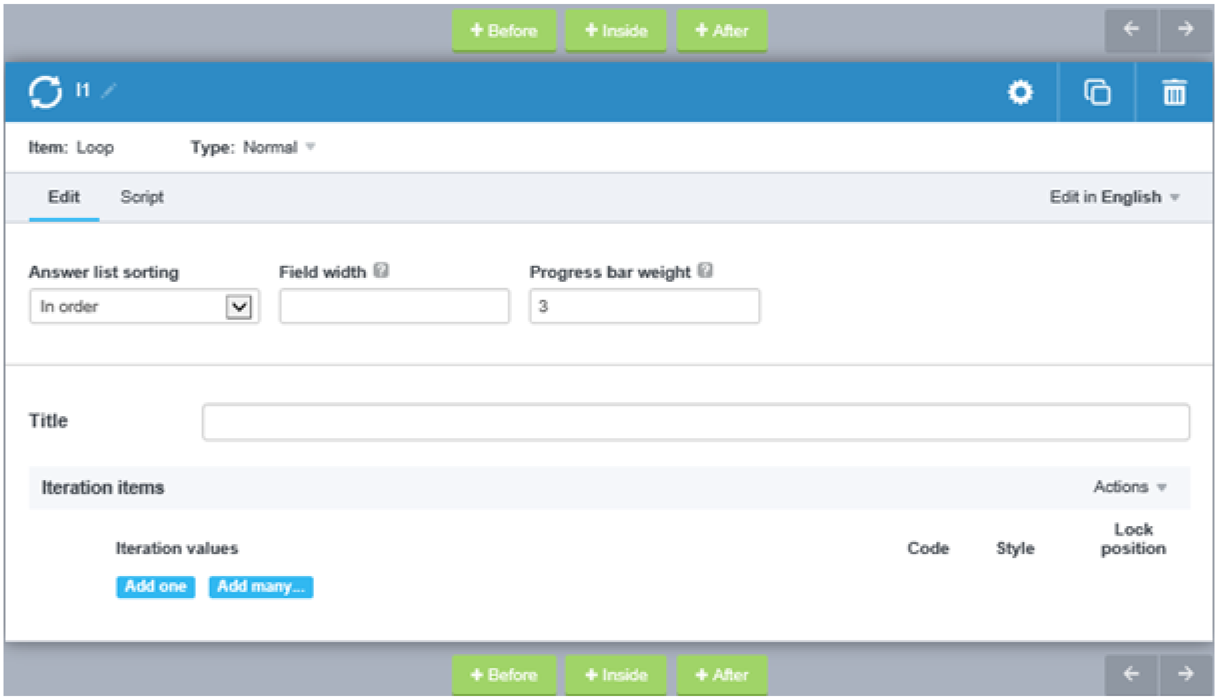


Figure 101 The Loop node's details page

4.4.23. The Condition Node

Use Condition items to create "Skip logic" in your survey, thereby altering the flow of a survey depending on the answers given to other questions. To create and edit a Condition, add it to the survey as you would any other item then click on it.

A condition item consists of three parts; an IF condition, a THEN clause and an optional ELSE clause.

The flow is controlled by a Boolean expression in the IF condition that evaluates to either TRUE or FALSE. If the expression evaluates to TRUE, the survey will execute the routing items in the THEN node. If the expression evaluates to FALSE, when the ELSE node exists the items in the ELSE node are executed. If the ELSE node does not exist then the survey merely continues to the next node.

You can build the condition using the condition builder functionality (see How to Build a Condition on page 161 for more information), or you can script it using JScript. Note that if scripting is used then this will take precedence over logic created using the builder. Also, if script is used then it will be included in the condition ID in the survey pane. If script is not used then the condition ID will include the question on which the condition is based.

The examplebelow shows a multilayer conditional item in the survey pane in which script is used.

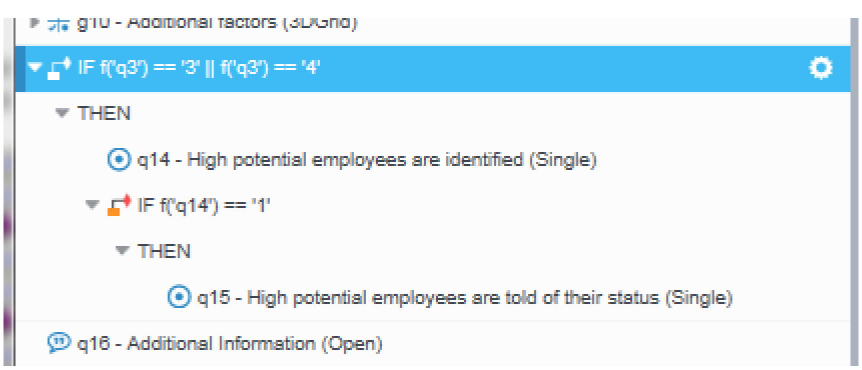


Figure 102 Example of a Condition node

Note: If you change a condition from IF-THEN-ELSE to IF-THEN, any items remaining in the ELSE branch will be deleted. If you wish to keep these items, move them elsewhere in the survey before you change the condition.

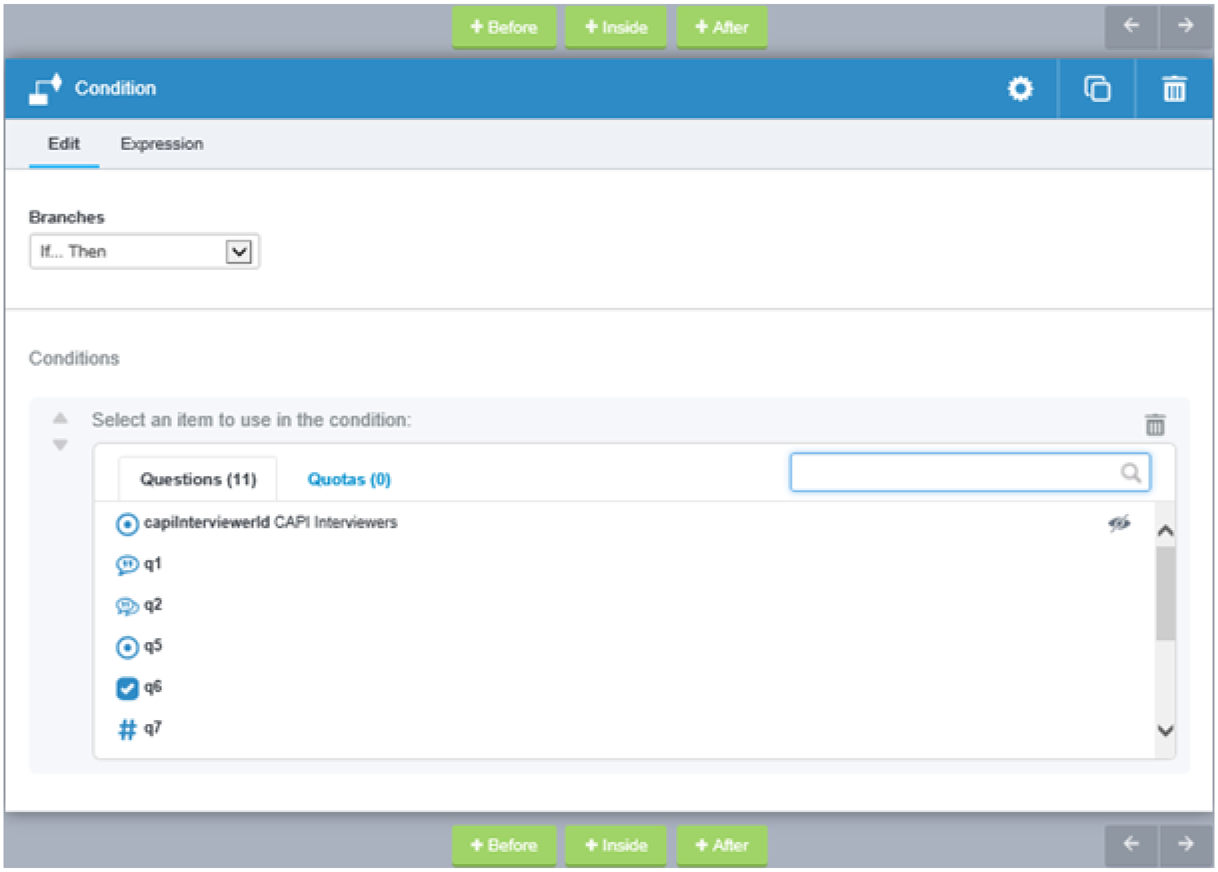


Figure 103 The Condition node's details page

4.4.24. The Script Node

For advanced routing, recoding, redirects, calculations on answers to questions or other programming efforts, you can insert script-nodes that will run JScript-code when executed. When using script nodes, care must be taken to create codes that will run without errors. JScript is an interpreted programming language, which means that the code will only be checked at run-time. You should always perform thorough testing of questionnaires that include script nodes.

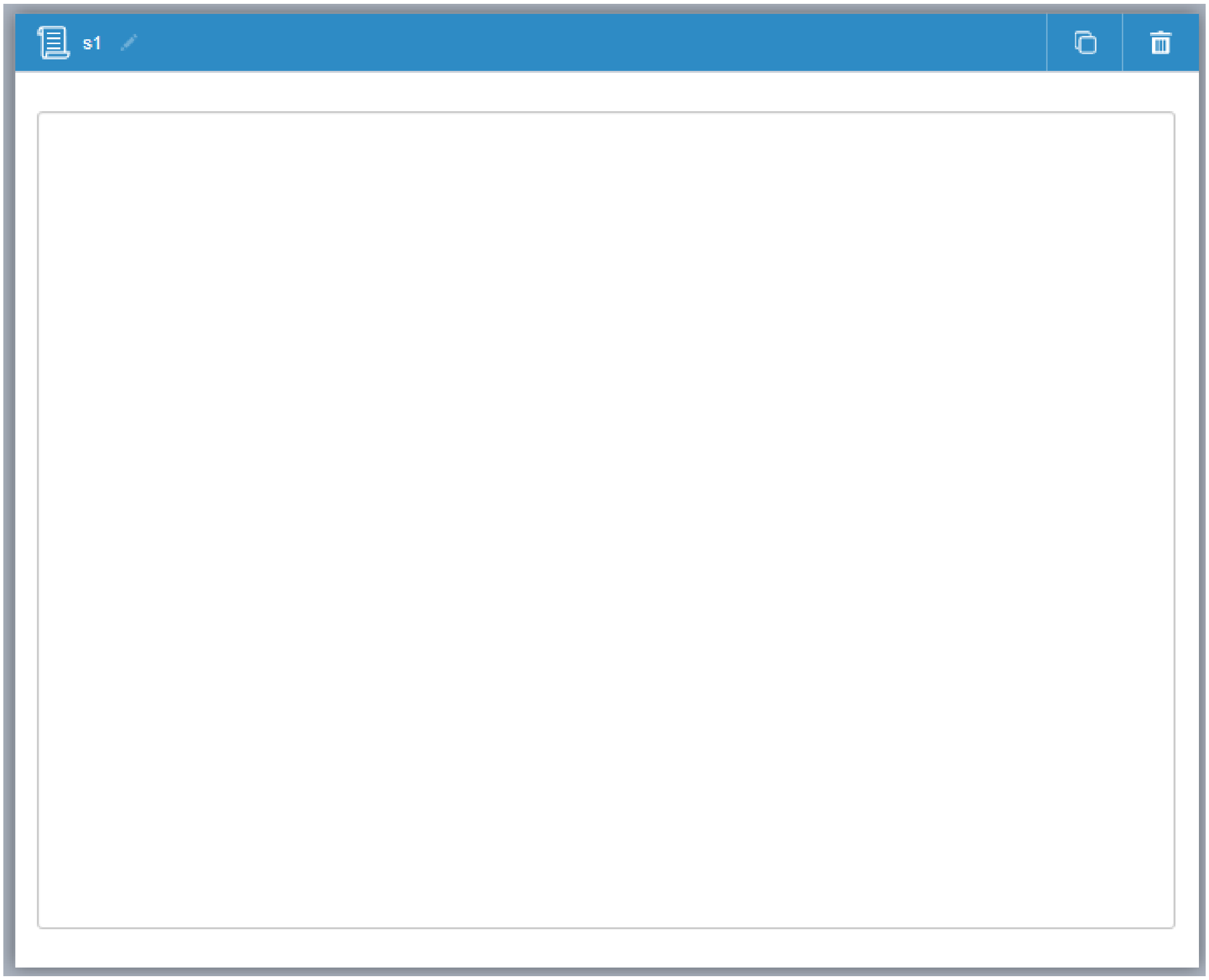


Figure 104 The Script node's details page

Example:

You can use a script node to for example change the status for the respondents before they have actually finished the interview. You may have some pages at the end of your interview after the final "data question", and it would then be possible for a respondent to end the interview by closing their browser after having answered all your questions but before the final page is reached. This could result in an "incomplete" status for the respondent even though you have got a full set of data from them. To avoid this you can include a SetStatus script in the survey immediately after the last question but before the additional pages. The script required in this case would be:

```
SetStatus('complete');
```

As the respondents pass the script node their status will then be set to Complete even if they end the interview before reaching the last page.

Refer to the Confirmit Scripting Manual for further details.

Note: For Optimized database surveys, if a survey scripter attempts to set an unknown code on a single, grid or 3D-grid, the value is ignored (not set), and a warning email is sent to the survey owner. The respondent will not see any errors. In a similar fashion, if a scripter attempts to set a value that is longer than the field width, the value is truncated and an warning email is sent to the survey owner. Again, the respondent will not see any errors.

4.4.25. The Page Break Node

This is a preset variation of the Directive node (see The Directive Node on page 88 for more information) that allows you to place a page break at a specific point in the survey, irrespective of previous directives that may for example specify multiple questions per page.

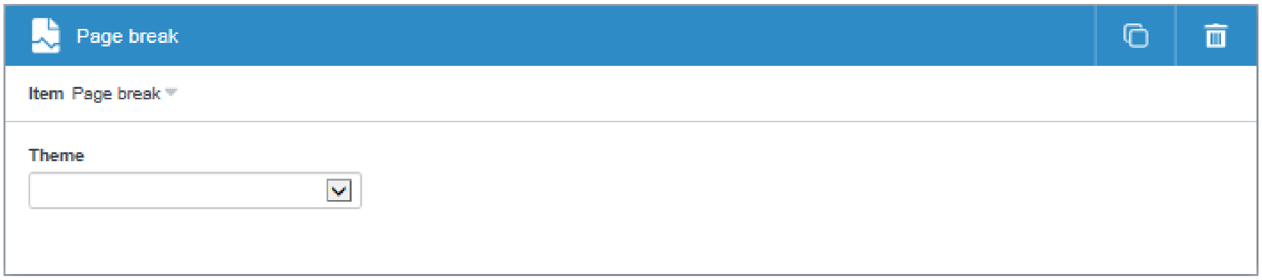


Figure 105 The Page Break node's details page

4.4.26. The Directive Node

Directives contain instructions to the survey generator. Five different directives exist, which are used to control page break insertion, navigation and progress bar start and end points. By default, a Directive will be set to Multiple questions per page. Note that you can set this to be a Page Break node (see The Page Break Node on page 88 for more information).

- **Item -** select whether this node is to be a Directive or a Page Break.

If this node is set to be a Directive, then the Directive Type options become available:

- **One question per page** - Survey Designer inserts a page-break between each question, so only one question appears on each page.
- **Progress bar begin** - the progress bar starts from this point. This allows you to have some questions or pages, for example information or personal questions, before the progress bar starts, so you can keep the progress bar just for the "survey questions".
- **Progress bar end** - defines the end point of the progress bar. This allows you to place information or other pages, for example a "thank you" page, outside of the progress bar, keeping the bar only for the "survey questions".
- **Forward navigation only -** a theme can be used to remove the **Back** button from the interview pages, but this method is not fool-proof; it is possible to work around it. This directive removes the **Back** button from subsequent interview pages irrespective of whether the button is included in the survey's layout. Note that if the interview's survey settings require the browser **Back** button to act like the survey **Back** button, then when this directive is in use the browser **Back** button will also not function for the survey. If at some point in the survey you want to re-display the **Back** button, use the Survey-defined navigation directive described below. Note also that this directive will take effect even if it is located inside a condition that is skipped.
- **Survey defined navigation -** when you have used a "Forward navigation only" directive to remove the **Back** button, use this directive to re-display the button according to the survey settings and theme currently in use.
- **Theme -** if you wish to use a theme other than the default, select the theme to be used.

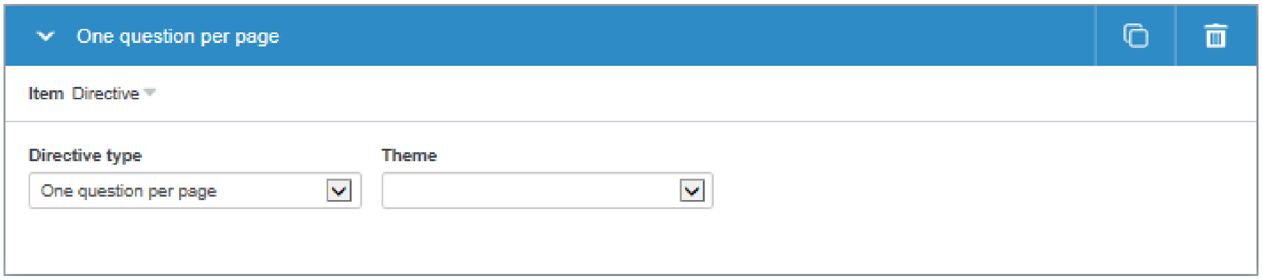


Figure 106 The Directive node's details page

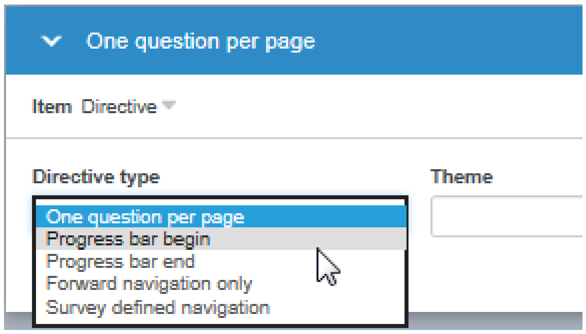


Figure 107 Selecting a Directive type

Horizons evaluates all logic on the server. When the "multiple questions per page" directive is in effect, questions will be grouped on the same page unless the survey generator:

- encounters a condition, script node, or a new directive in the survey definition,
- detects a dependency between two questions as a result of text piping that prevents them from being displayed on the same page, or
- is unable to determine whether there could be a dependency between a question and those that have already been added to a page.

Progress bars are displayed if the survey is generated with the Include Progress Bar option selected in the Overview page Settings area (see The Settings Area on page 29 for more information). The progress bar will display as a fraction of the number of questions displayed on pages up to and including the current page relative to the total number of questions between the progress bar start and end points. If a survey contains no progress bar directives, then the progress bar start and end points are the beginning and end of the survey. Progress bar directives give the survey author the ability to insert multiple progress bars in the survey, which is useful if the questionnaire consists of several distinct sections and only a small fraction of the questions apply to each individual respondent.

Note: Progress bar directives cannot be nested. A "Progress bar begin" directive that appears after a previous unmatched Begin directive will be ignored, as will a "Progress bar end" directive that is not preceded by a Begin directive. No progress bar is displayed before the initial "Progress bar begin" directive and no progress bar is displayed after the final "Progress bar end" directive.

4.4.27. The Stop Node

A Stop node in the survey will end the interview. This is mainly used for screening-purposes, and to end the interview at various places in the routing.

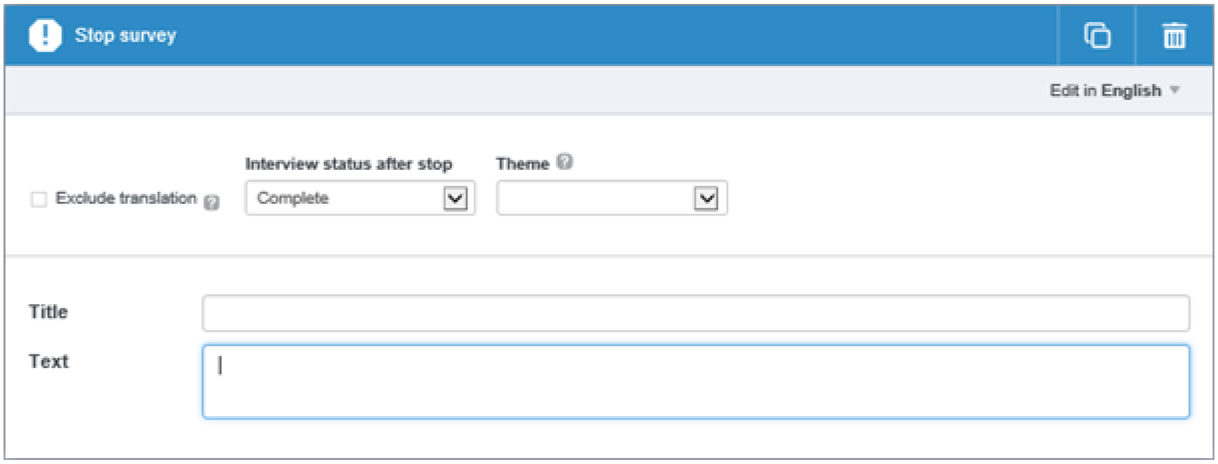


Figure 108 The Stop node's details page

- **Exclude Translation** - check to exclude the node from the translator interface. This allows you to hide nodes that are used for internal programming purposes from the translators in Confirmit Translator.
- **Interview status after stop code** - select the appropriate code to set on the Stop node. The options are:
  - **Complete** - the web interview is to be considered a completed interview. The respondent data status is set to "Complete", and the end time of the interview is registered.
  - **Screened** - use this status-code to mark the interview as "Incomplete due to screening". The respondent data status is set to "Screened" and the end time is set.
  - **Quota full** - the interview is stopped for a certain group of respondents as the quota for that group is full .

Note: If the CATI channel is selected for the survey, an additional option becomes available.

  - **No change** - allows for Stop nodes to be issued that do not change the current Confirmit Status value. In a CATI interview this is essential as the Extended status codes are used to classify call outcomes, for example No reply, Busy, appointment etc. In the Confirmit Status list these are all "Incomplete". The "No change" option therefore allows the status to be left "as-is" - Incomplete. When operating in a multimode context the "No change" value is applicable to ALL modes. If the CATI mode is disabled for the survey, then the value is automatically changed to "Complete".
- **Theme** - the themes available to the survey are listed in the drop-down list. For the Theme setting to be applied, you must specify your own title and text in the appropriate fields.
- **Extended Status** - available only when CATI is selected. This allows the 'stop' status to be defined more accurately, and is intended primarily for use with CATI interviews that store the outcome of the call for the interview record. The extended status is a numeric value corresponding to the 'Extended status' list within the CATI Supervisor. Refer to the CATI Supervisor's Manual for further details.

The Stop node can also be used at the end of the survey if you want to customize the last survey page instead of using the system-generated "Thank you" page.

The title and the status set on the stop node will be displayed in the survey in the same ways as question IDs and titles are displayed. The message presented to the respondent can be presented in the selected language if it is translated in the node fields.

4.4.28. The Email Node

You can send emails from within a survey by using an Email node. The email will be sent to the specified address(es) when the respondent passes this point in the survey. Note that the respondent will not automatically be informed that the email is being sent; you will need to copy him/her if you wish them to know. To create an Email node:

1. Click on the **Email** node in the Add Item overlay, or

Click the overflow icon for an item in the survey column at the place where you wish to insert the email node, choose **Add item before** or **Add item after** as appropriate, then select the **email** item from the Add item overlay.

An Email node is created in the survey, and the Email Details page opens.

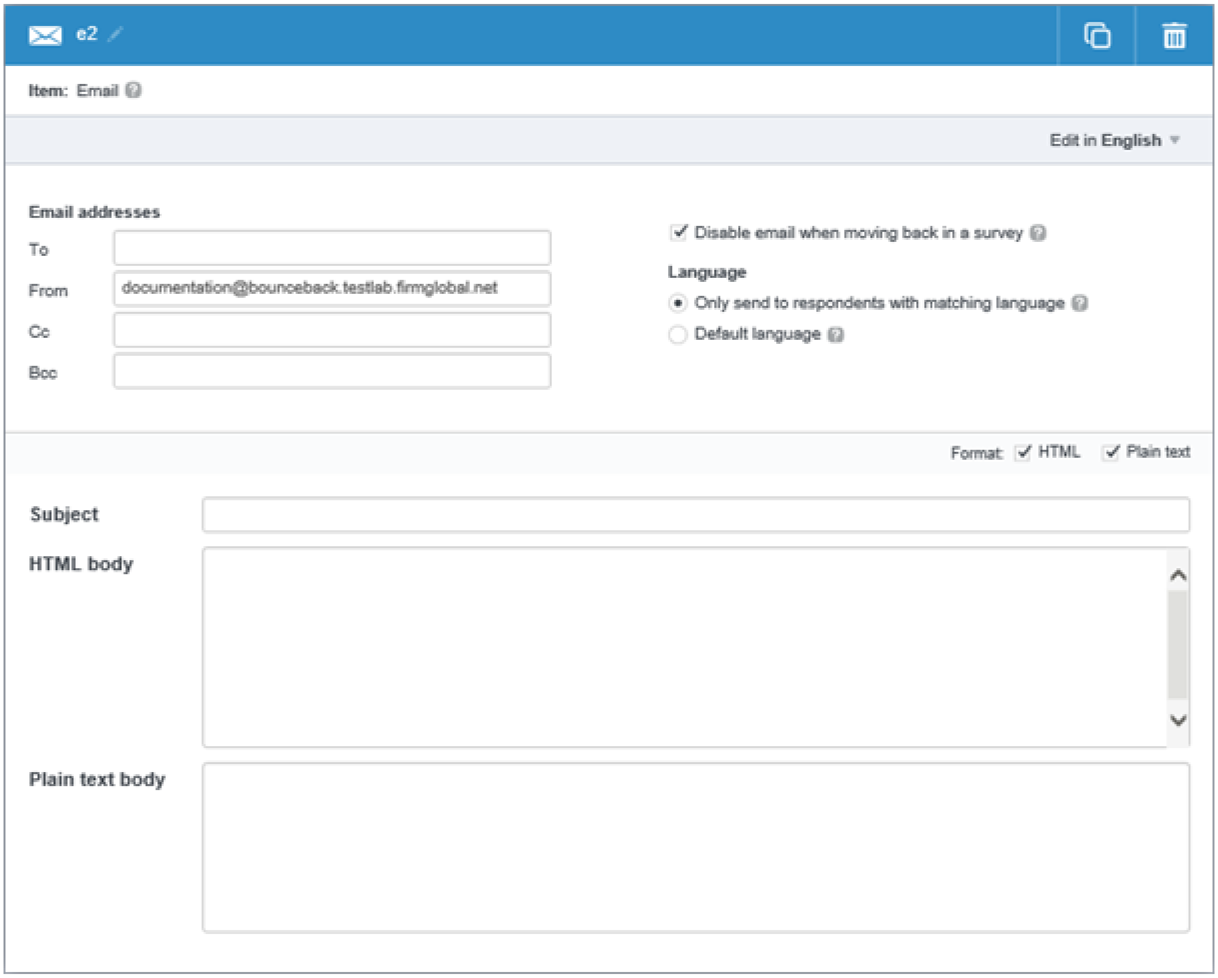


Figure 109 The Email Details page for setting up an email to be send from within a questionnaire

2. Select the properties and options, and add the addresses as required.
3. Save the changes.

4.4.29. The Chart Item

The Chart item provides simple reporting of results on a specified question, and is ideal for use where you need "instant" feedback to the respondent. Open text list, Single, Multi, Numeric list, Ranking and Grid questions are supported.

Note: A Chart item can show a maximum of 50 categories. That is, you cannot base a chart on a question that has more than 50 answer alternatives.
Also, you cannot link from a chart to a question placed inside a loop.

When you create a Poll, a chart item is automatically included on the second page of the Poll survey. For other surveys you can add a chart item in the normal manner. Click on the Chart item in the Survey column to open the node details page for the chart.

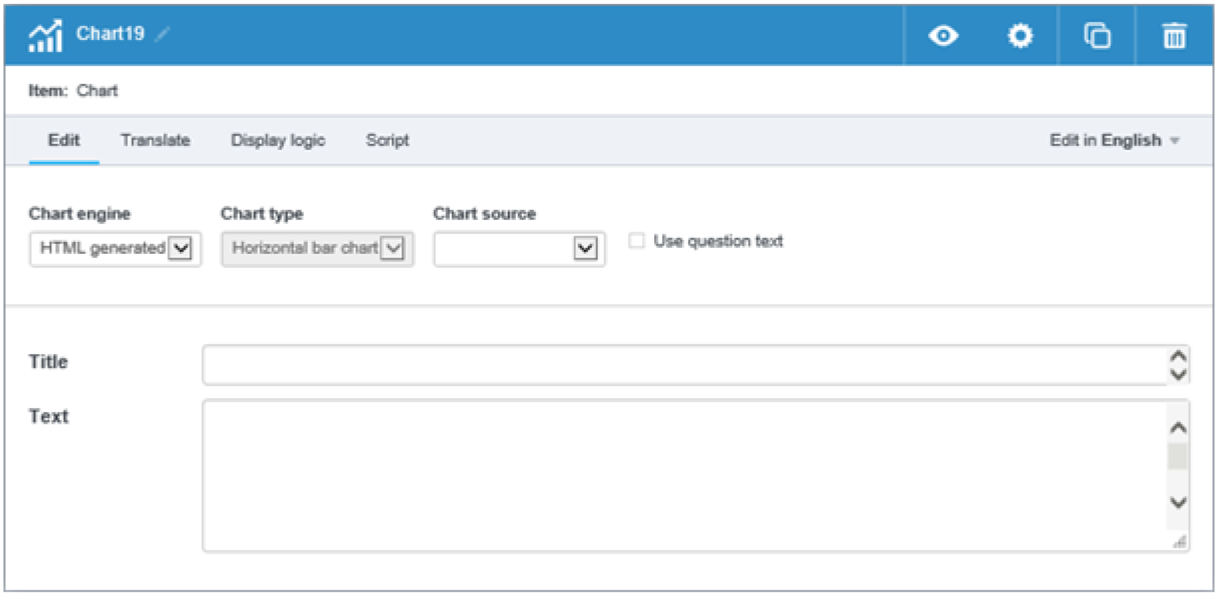


Figure 110 The Chart item's details page

The fields and options are:

- **Chart engine** - the application used to generate the chart. The Chart item can currently render two chart engines:
    - o **HTML** - (default) only bar charts can be rendered.
    - o **Google Charts** - horizontal and vertical bar, pie and line charts can be rendered.

Important
If you select the Google Charts engine your data will be sent to the Google processor, where the chart will be created and returned. Confirmit has no control over the Google Charts functionality, and can therefore not guarantee that the engine will be available at any particular time, nor that it will function as expected.

- **Chart type** - if you select Google Chart as the chart engine then you can select the type of chart that is created.
- **Chart Source** - the source of the data from which the chart is to be created. Click the down-arrow and select the question you wish to use from the list of Open text list, Single, Multi, Numeric list, Ranking and Grid questions in the survey.
- **Use question text -** check to use the text from the question in the chart. All the text fields on the chart item will then be disabled, and when the survey is generated the texts are copied over from the data source. Default is checked when creating a new poll, unchecked for a chart in a standard survey.

The Title and Text fields allow you to add text to the chart. A set of fields will be presented for each language selected.

Note that the Chart item has an additional button in the toolbar - **Recalculate All**. Use this button to recalculate the chart data, for example when answers are added, removed or changed, or respondents are uploaded. The button will only be enabled after the survey is launched with the chart node present.

4.4.30. The Telephony Node

If a survey has the CATI mode enabled (see The Settings Area on page 29 for more information), the Telephony item becomes available that can be added to the questionnaire. This item is used to control the transmission of the dialing commands to the CATI console for dialing in CATI-enabled surveys. Click on the item in the Survey column to open its details page.

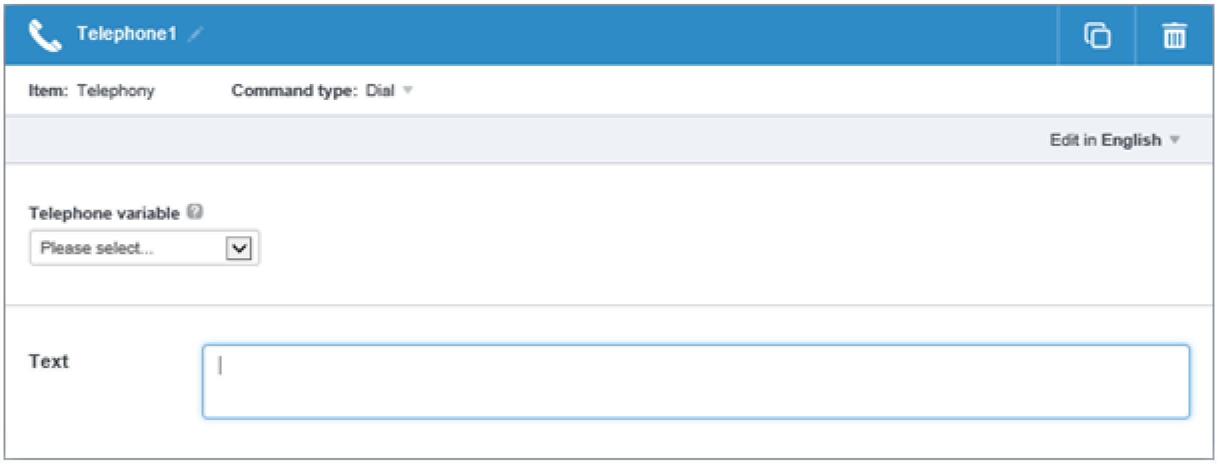


Figure 111 The Telephony item's details page

The fields and options are:

- Command type - the command that this item is to activate.
  - **Dial -** causes the system to issue a telephone number dial command. The Telephone Variable drop-down is available.
  - **Hang up -** causes the system to hang up the existing respondent telephone number. The remaining fields in the details page are removed.
  - **Allow/Ignore telephony commands -** specifies whether or not the dial/hang up commands should be active (used when going back through the survey)
- **Telephone variable -** select a phone number, or leave blank to use the default TelephoneNumber variable.
- **Text -** When Dial is selected, additional (optional) text (which can include data substitution) can be supplied. This text will be displayed on the CATI interviewer console when dialing is in progress. The open text variable corresponding to the respondent's telephone number is also supplied.

When Allow/Ignore telephony commands is selected, check the box to enable "Allow". If Allow is disabled (the box is NOT selected), then when the interviewer passes the next Dial/Hang up telephony command in the questionnaire, the console will not perform the command. This option will be useful if the interviewer needs to move backwards through the questionnaire - there is no point in trying to dial the number if it is already connected.

4.5. How to Add Items to the Survey

Once the survey exists you can start to add the required questions and nodes (see Item Types on page 64 for more information). To add an item:

1. Go to the survey designer page.

   If the survey is empty, the Add item overlay opens.

   If the survey already contains one or more items then you have three options available to you:

   - You can highlight an existing question, click on the **Edit** icon to open the drop-down menu and select **Add item before**, **Add item inside** or **Add item after** as appropriate.
   - You can click on an existing item to open its survey details page, then click the green **+ Before**, **Inside** or **+ After** button as appropriate.

   In both cases this opens the Add Item overlay.

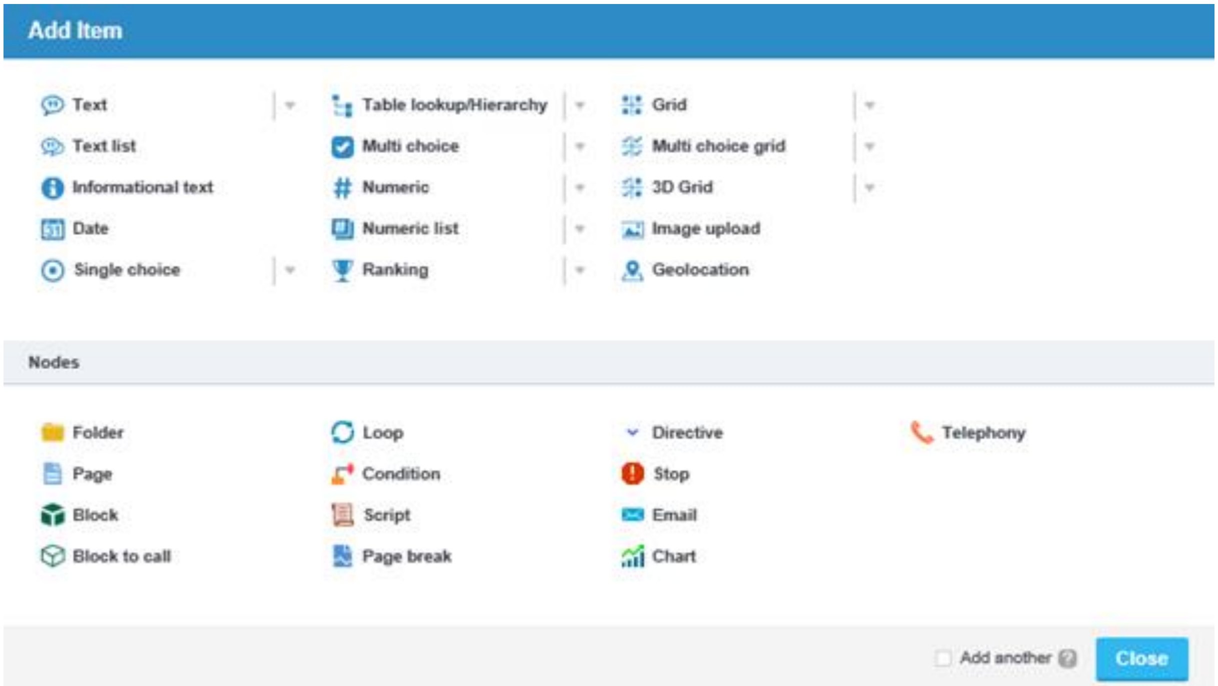


Figure 112 The Add Item overlay

- o If you wish to create an item that is similar to an existing item, then you can click on the existing item to open its survey details page, then click the **Duplicate** button in the upper-right corner of the page (see Duplicating Items on page 122 for more information). This creates a copy of the item that you can then edit.

2. Click ONCE on an item in the overlay to add it to the survey.

When you add an item to the survey, in this case an Info node, the item's Question Details page opens.

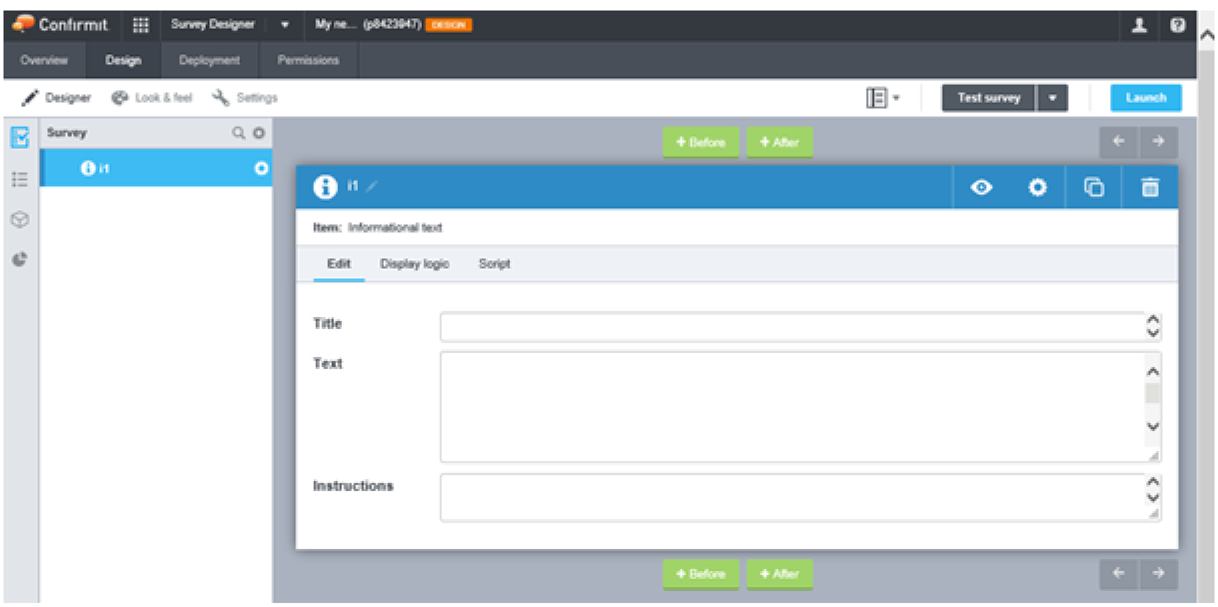


Figure 113 Adding an item to the survey

Here you add the title, text, instructions, answer options and edit other details as required for the item (see Editing an Item on page 100 for more information). Note that if this is to be a multilingual survey, there will be a set of fields available for each language that is selected for the survey. You can copy and paste text from other applications; when copying from MS Word, styles are maintained. To add texts for the various languages, click the **Edit in...** drop-down and select the language you wish to work with.

Tip
If you already know what the general layout of the survey is to be, you can quickly add the required questions and nodes with a minimum of clicks, then return to each later to set it up with texts, answers etc.
Check the **Add another** box in the lower-right corner of the Add Item overlay. Then when you select an item for the survey, the overlay re-opens immediately allowing you to select the next item. If this box is not checked, then when you click on an item to add it to the survey, the overlay closes and the question details page for the question opens in its place.

4.6. Scratchpad

The scratchpad is a simple text editor that is available via the **Item Editor** menu.

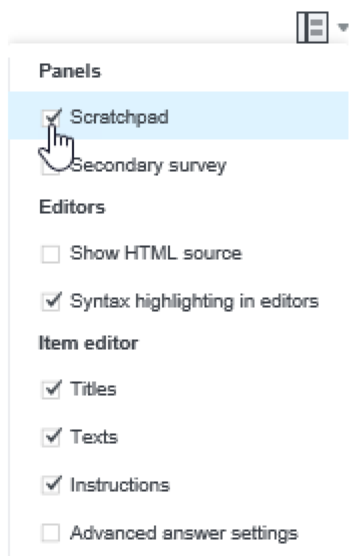


Figure 114 Activating the scratchpad

If you write text into the scratchpad, or paste it in for example from another application, you can then drag-and-drop or copy-and-paste the text into text boxes, grids, etc. in the survey. The content of the scratchpad is stored locally in the web-browser, and any text you place in the scratchpad is persistent, meaning that if you log out and back in again (from the same browser/PC) the text is still there. Similarly, both the overlay's size and position on the screen are remembered for subsequent logins, as well as whether it should automatically appear. The entire questionnaire can be pasted into the Scratchpad.

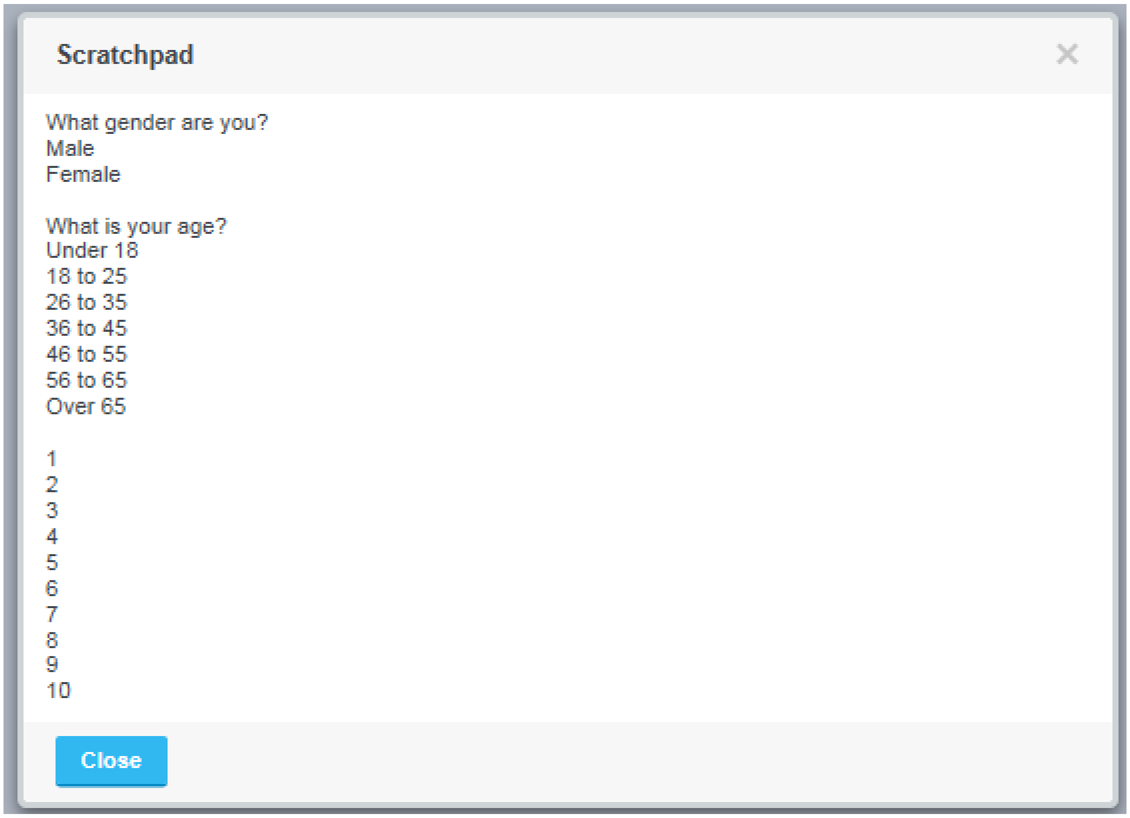


Figure 115 The scratchpad in use

If you copy or drag multiple lines of text from the scratchpad into a question's Answer list, each row of text selected in the scratchpad will become a separate option in the answer list. Additional rows will be created automatically in the list to accommodate the answers.

Note that if you close scratchpad then reopen it later, scratchpad will remember the focus point - the location of the cursor - within the text.

4.7. Secondary Survey

The Secondary Survey pane allows you to copy individual questions or complete folders containing several questions from another survey into the currently open survey. You can also copy texts from the questions in the secondary survey and paste them into questions in the current survey.

To display the Secondary survey pane, click on the **Item Editor** button in the Design page toolbar and check the **Secondary survey** box (see The Item Editor Menu on page 103 for more information).

Note that if you have previously used a secondary survey, then when the Secondary survey pane is opened it will display the last secondary survey selected by the current user.

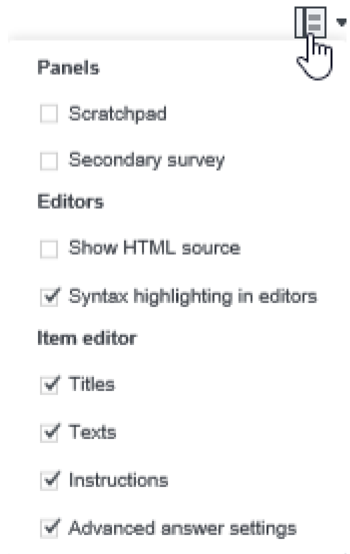


Figure 116 The Item Editor menu

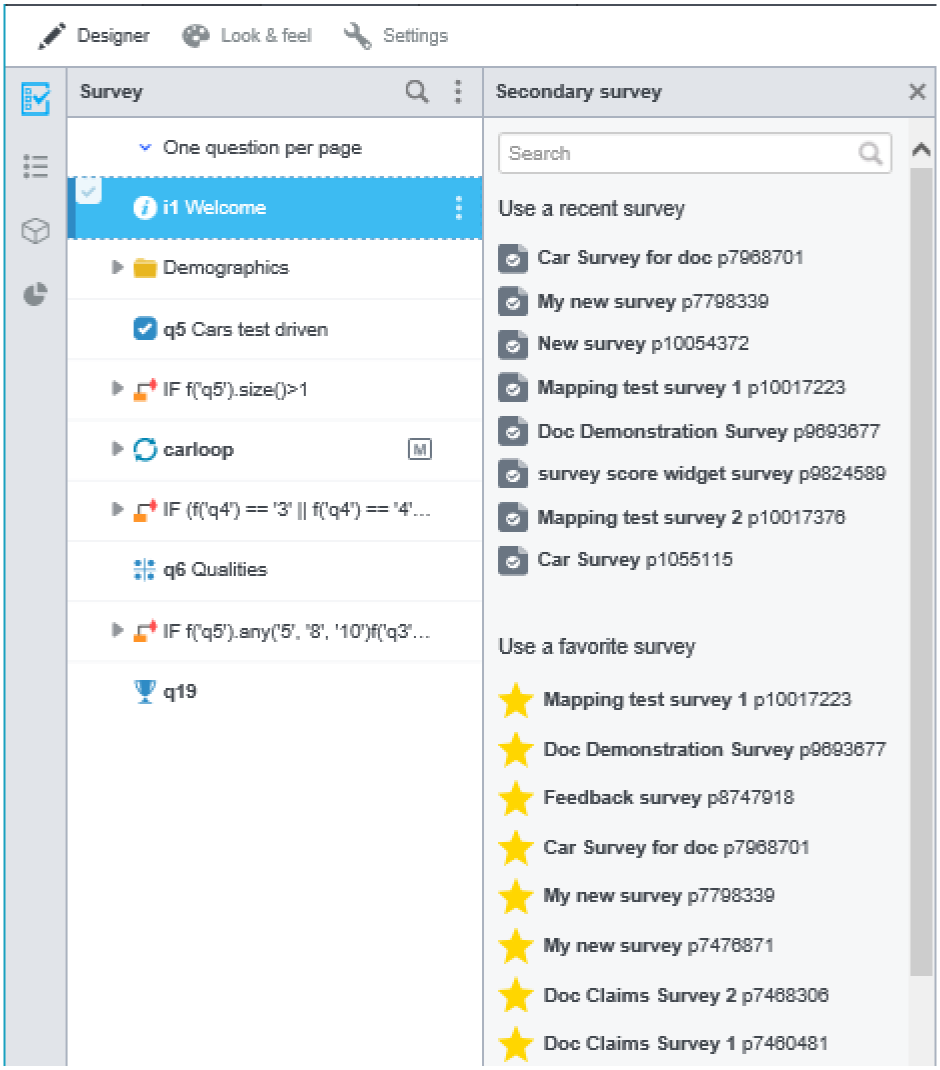


Figure 117 Example of the Secondary Survey pane

Note that surveys displayed in this pane will be displayed in Read Only mode.

To copy a question or folder from another survey into the current survey:

1. Open the Secondary survey pane as described above.
2. In the Secondary survey pane, find and select the survey you wish to copy questions from.

   The survey opens.

Note: If you wish to change the secondary survey, click the overflow menu icon (arrowed below) and select Clear current secondary survey; the survey selection list opens. If you wish to close the secondary survey pane, click the X button towards the right side of the survey header (circled below).

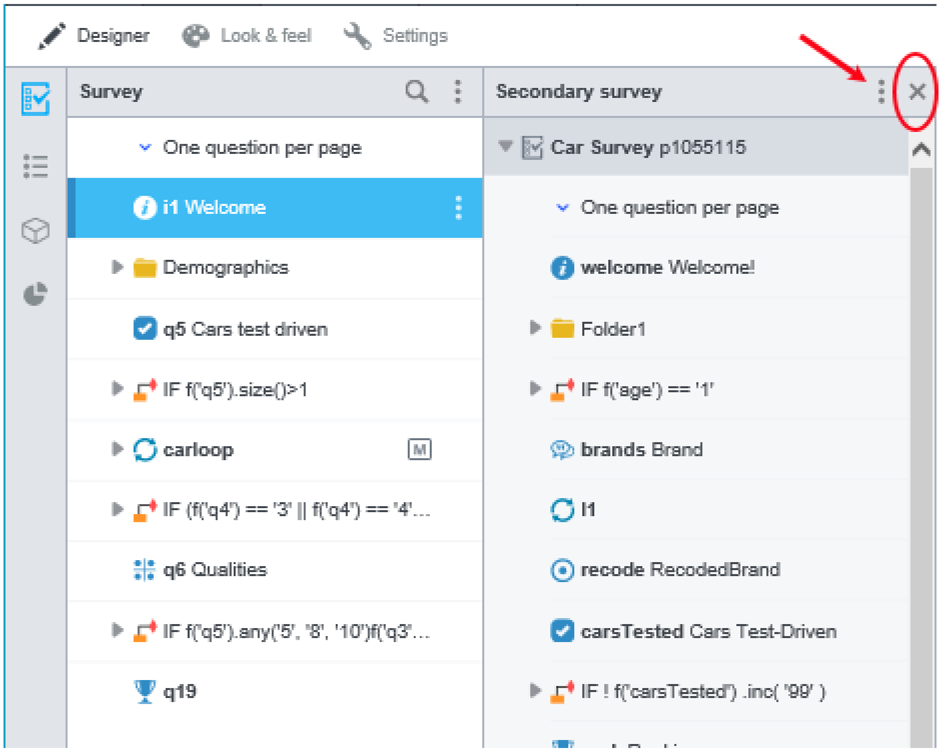


Figure 118 The survey open in the Secondary survey pane

3. Drag and drop the required question(s) from the secondary survey into the current survey.

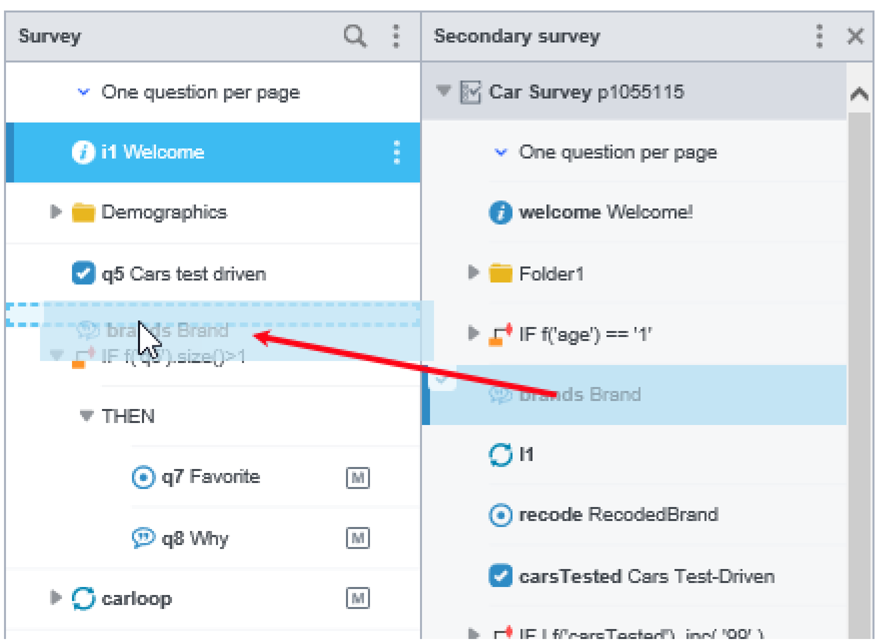


Figure 119 Dragging and dropping a question from the Secondary survey pane into the survey

Note that you do not move the question out of the secondary survey; you make a copy of the question and place it into the current survey.

The new question is now an integral part of the current survey, and you can move the question and edit it in the same way as any other question in the survey.

You can view the secondary survey objects, for example to ensure you are copying the correct question. To do this, click on the object in the Secondary survey pane; the object opens in an overlay. Here you can also copy texts from the questions in the secondary survey using standard selection and copy/paste procedures.

Note however that you cannot make and save changes to Secondary survey objects here. If you wish to make changes to the secondary survey then you must first open that survey as the "Current" survey in Survey Designer.

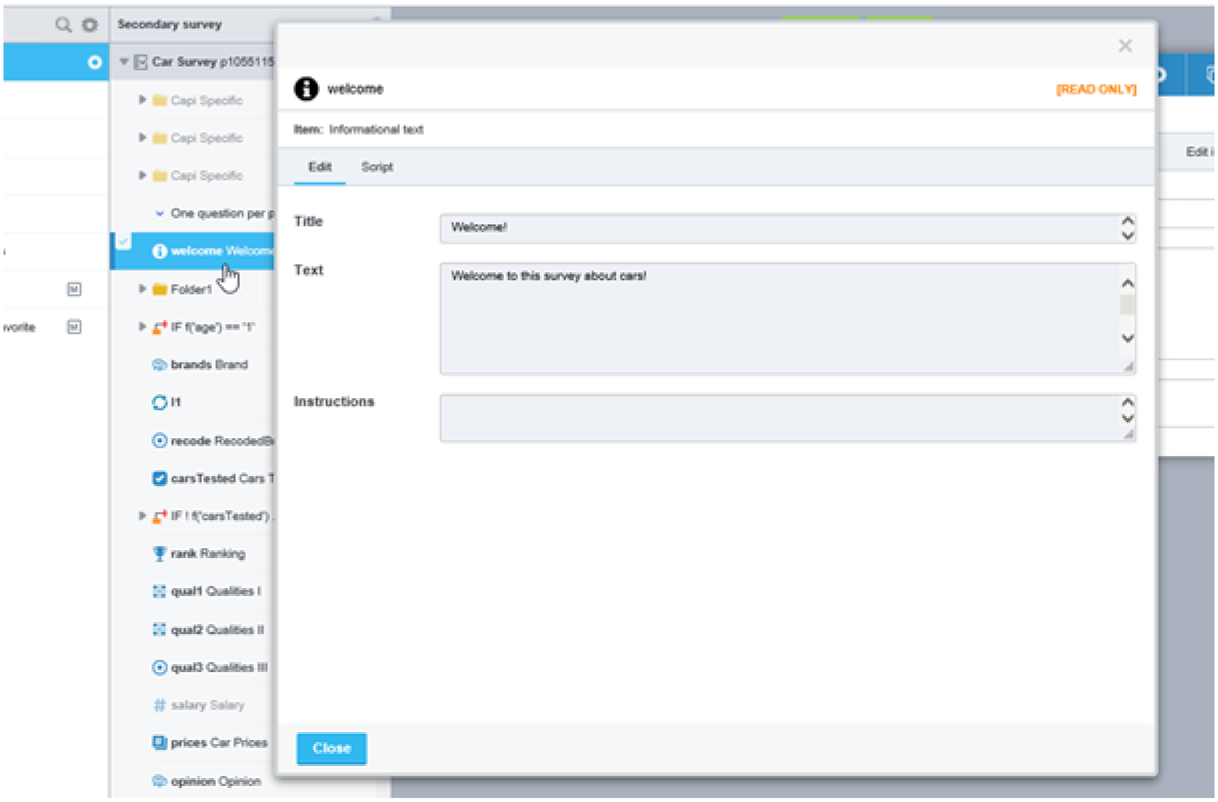


Figure 120 Example of a secondary survey object opened in the overlay

4.8. Editing an Item

To edit an item, either click on the item in the Survey column or click on the **Edit** icon for the item and choose **Edit** from the menu that appears. In both cases this opens the Question Details overlay for the item.

Note: When you log in to Horizons and open a survey you have worked on previously, when you go to the Survey Designer page you will automatically be taken directly to the item or node you last worked on. If no previous item is registered then you will be taken to the first item in the survey.

The Question Details overlay contains a number of fields and options depending on the type of question. The properties are described in the Question Properties section (see Question Properties on page 127 for more information). Note that you can re-size the Question Details overlay as required to provide more space for your texts etc.; drag the right border.

All questions are given a Question identification (qid) when they are created (see The Question ID on page 102 for more information). This is an automatically generated, alphanumeric string with no spaces, starting with a letter. You may replace the system-generated id with your own; click on the qid edit icon to open the field and edit the qid as required. The qid displayed in the survey column is updated automatically. Note that the maximum length for question IDs is 50 characters.

All questions have a Title and a Text field, and the majority also have an Instructions field.

- **Title -** the title of the question. The title appears in the survey designer column, and it functions as the heading for the question on the survey page in a web survey. It also appears as a descriptive label for the question when used in Reportal. The length of the title can be maximum 255 characters, otherwise it will be truncated. When a title is not provided, Text will be used as a title.
- **Text -** the question text.
- **Instructions -** here you can type in any descriptive instructions or comments you may wish to provide to the respondent.

Note: You can use text substitution (piping) in all text fields but not in script nodes, conditions, code/column masks or validation code fields (see Text Substitution or Response Piping on page 108 for more information).

These fields have a text formatting toolbar (see The Text Formatting Toolbar on page 104 for more information).

The fields also support HTML. To use this, go to the **Item Editor** drop-down menu (see The Item Editor Menu on page 103 for more information) and select **Show HTML Source**.

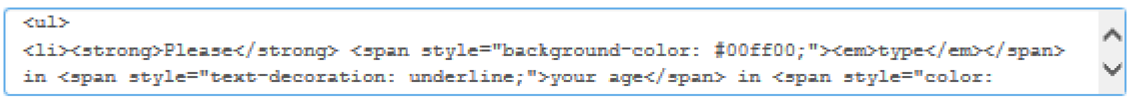


Figure 121 Example of a text field showing the HTML source code

4.8.1. The Item Toolbar

All the item types have a toolbar across the top of their question details page.

Figure 122 Example of an item's toolbar

The items and tools in the toolbar are as follows:

1. The **Item** icon. This is different for each type of item and indicates the item type.
2. The item's question ID (qid). This must be unique for the survey (see The Question ID on page 102 for more information).
3. The qid **Edit** icon. Click to open the field so you can change the question ID.
4. The **Referenced in** icon. If the item is referenced in other items, this will be indicated here (see Items Referenced in Other Items on page 102 for more information). Click the icon for more information.
5. **Preview** - opens a preview window so you can see how the question will appear to the respondent.
6. **Properties -** opens the Properties column towards the right side of the window (see The Properties Sheet on page 139 for more information). To close the column, click the X in the upper-right corner of the column.
7. **Duplicate** - creates a copy of the current item in the survey designer (see Duplicating Items on page 122 for more information).
8. **Delete** - deletes the current item (see Deleting and Restoring Items on page 122 for more information).

Note that if the item has been deleted from the survey then the toolbar will be gray.

4.8.2. The Question ID

The Question ID (qid) is the identification code used by Survey Designer for the question. This code is generated automatically when the question is created, and comprises an alphanumeric string with no spaces. The qid in its default format starts with a letter depending on the question type, and all the qids in a survey are numbered consecutively, starting from 1, in the order in which they were created. If a question is deleted, it's qid is not reused. You may replace the system-generated qid with your own (see below), but the qid MUST be unique for the survey. Note that the maximum length for a qid is 50 characters.

The qid is displayed for each question, both in the survey designer column and on the toolbar of the question's question details page.

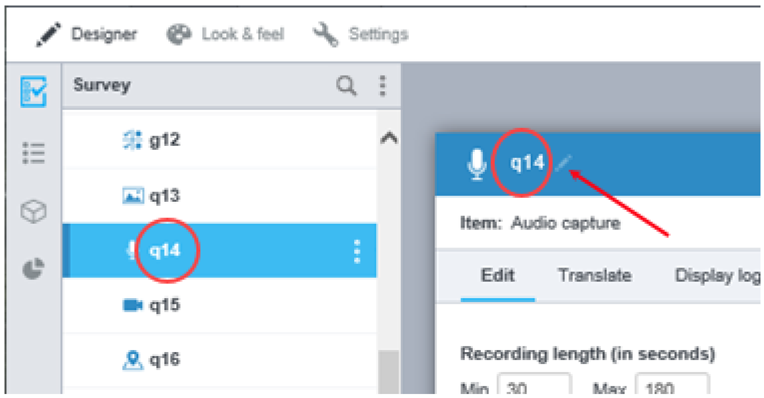


Figure 123 The qid for a question is displayed in the survey designer and in its details page

You can edit the qid. To do this click on the qid **Edit** icon (the "pencil" icon arrowed in the figure above) to open the field, and edit the qid as required. The qid displayed in the survey column is updated automatically. Note that the qid MUST be unique for the survey.

Note: You do not have to change the default qid for a node, even if you introduce a node between other existing nodes (for example at a late stage of the survey construction). However if you do change the qid, be very careful to ensure the new qid is unique for the survey! For example, if you introduce a new question between questions q5 and q6, where q5 is a multi question, do not label the new question q5_2 as this will already be the code for the second alternative in the original question q5.

If you change a qid when the survey is live, a new column will be created in the database. The old column will however remain in the database with its original qid and any data that was gathered up to the point the qid was changed. If a survey has previously been launched to production then you should not later reuse an "old" qid for a different question type, or change the case of any characters in an existing qid. Doing this can cause problems when exporting the data because the question that used the qid originally will still exist in the database. If you intend to relaunch the survey using the Create New Database option then this is not an issue because the database is created anew.

4.8.3. Items Referenced in Other Items

If an item, for example a question, reusable list, condition or block, is referenced in other items, this will be indicated in the item's toolbar by an orange rectangle with the number of items it is referenced in. If the current item is changed, the changes may impact the behavior of those items in which it is referenced, so care should be taken and the results should be checked.

Click the icon to open an overlay listing the other items in which the current item is referenced.

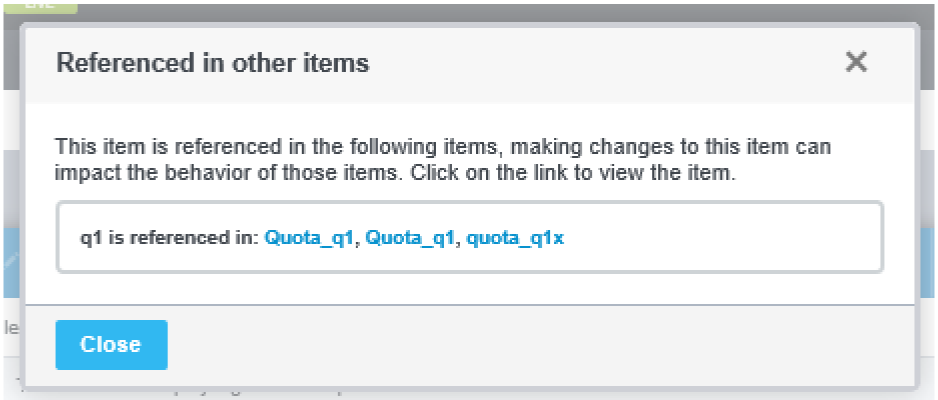


Figure 124 The Referenced in other items overlay

Each item in the list is a link to the relevant item - click the link to go to that item.

Note that the Referenced in items do not include text-based references, for example script-based conditional piping syntax.

4.8.4. The Item Editor Menu

The **Item Editor** menu button is located towards the right side of the Designer page title bar.

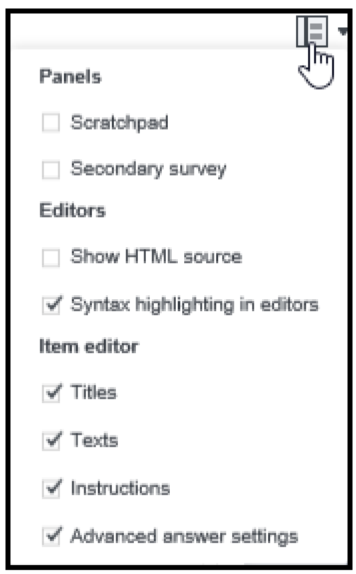


Figure 125 The Item Editor drop-down menu

The options in this menu allow you to activate or deactivate additional functionality:

- **Scratchpad -** check to activate a simple text editor page that enables you to copy/paste text from another text editing application, then drag and drop that text into a question's text fields (see Scratchpad on page 95 for more information).
- **Secondary survey -** allows you to copy individual questions or complete folders containing several questions from another survey into the currently open survey (see Secondary Survey on page 96 for more information).
- **Show HTML source -** displays the HTML source code for all text fields in a question details page.

- **Syntax highlighting in editors -** the Syntax Highlighter functionality automatically color-codes key words, and provides lists of selectable options under specific conditions while scripting. Note that this option only applies to Survey Designer, and the **Disable Script Highlighting** option in the **User Settings** overlay (see User Settings on page 8 for more information) applies only to Professional Authoring.

When viewing and editing questions, it may be useful to hide irrelevant fields. Or you may just not want to use specific fields in your survey. These selections apply to all editing areas, including individual question editing, multi-editing and the Translate tab (see The Translate Tab on page 104 for more information). By hiding a field the contents are not deleted, you are just freeing up space on your screen.The following three options allow you to show or hide the various fields for the survey questions.

- **Titles -** select to show the question Title fields.
- **Texts -** select to show the question Text fields.
- **Instructions -** select to show the question Instructions fields.
- **Advanced answer settings -** check this box to display additional setup options for the survey questions' answers. When this box is checked, the additional options will be displayed for all question types where they are available (see Advanced Answer Settings on page 151 for more information).

4.8.5. The Text Formatting Toolbar

The various text fields in a question are enabled for Rich text editing. When you click into a field, a formatting toolbar becomes available.

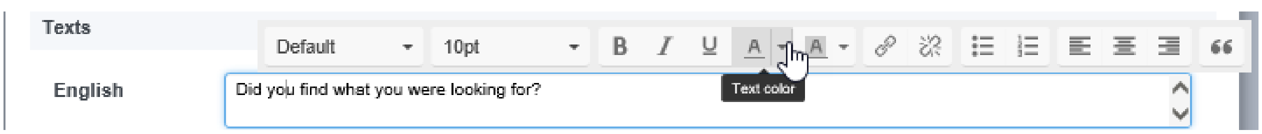


Figure 126 The text formatting toolbar

The tools enable you to perform a number of basic text formatting functions such as selecting font type and size, and applying bold font, italics, underlines etc..

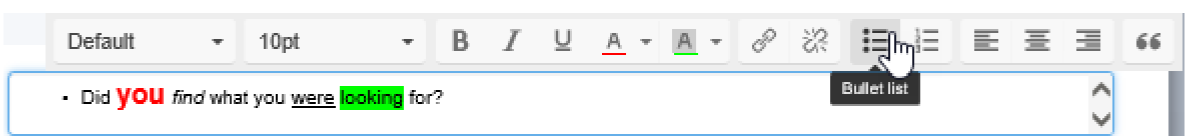


Figure 127 Using the text formatting tools

Whenever you make any changes to text using the formatting tools, <p> tags will be added to the text. Note that this toolbar is only available for text fields; not for answer and prompt fields.

4.8.6. The Translate Tab

Using the Translate tab you can edit texts in several languages simultaneously.

1. In a question's Details page, go to the **Translate** tab.

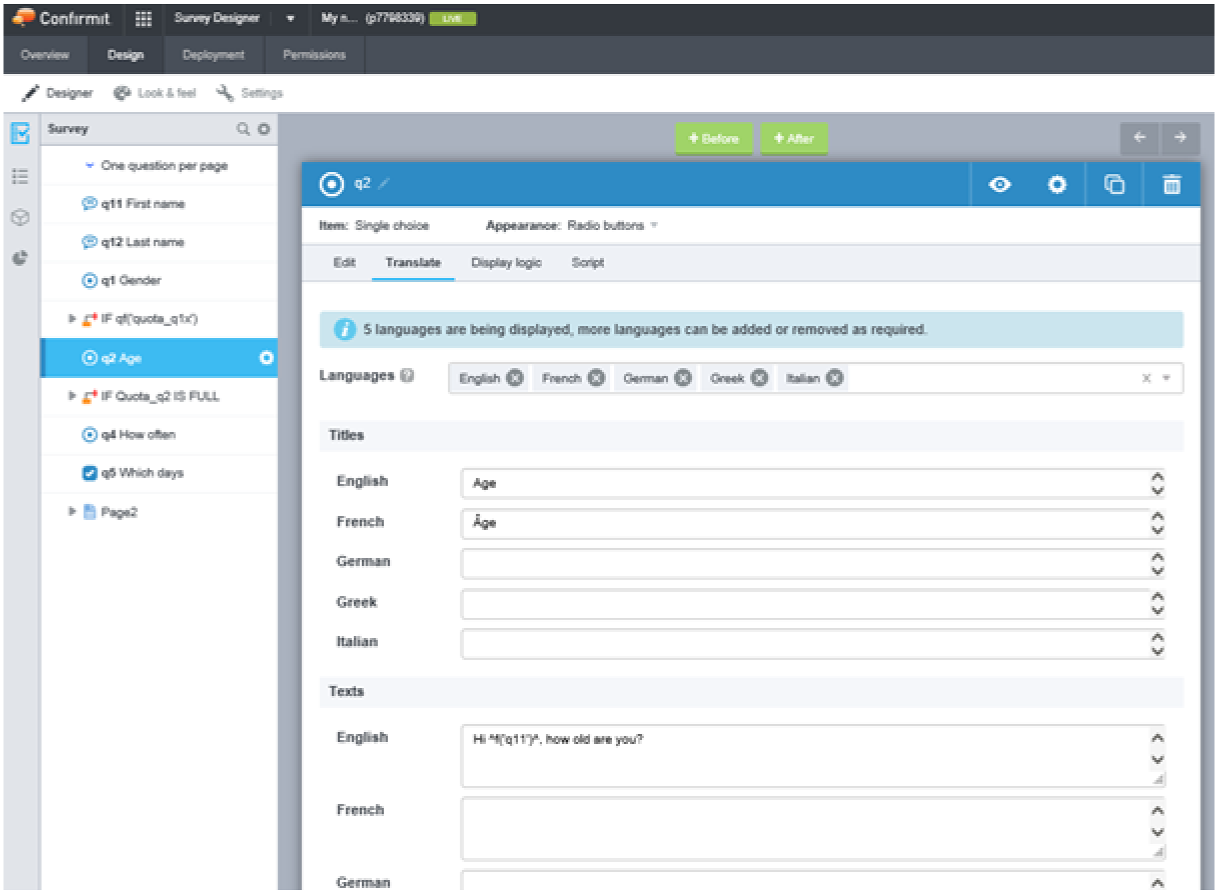


Figure 128 Example of the Translate tab for a single question

When you first go to this tab it will automatically load up to the first five languages (the default language will always be at the top of the list). However you can easily add or remove languages as required by going to the drop-down. The selected languages will be remembered for you for the survey.

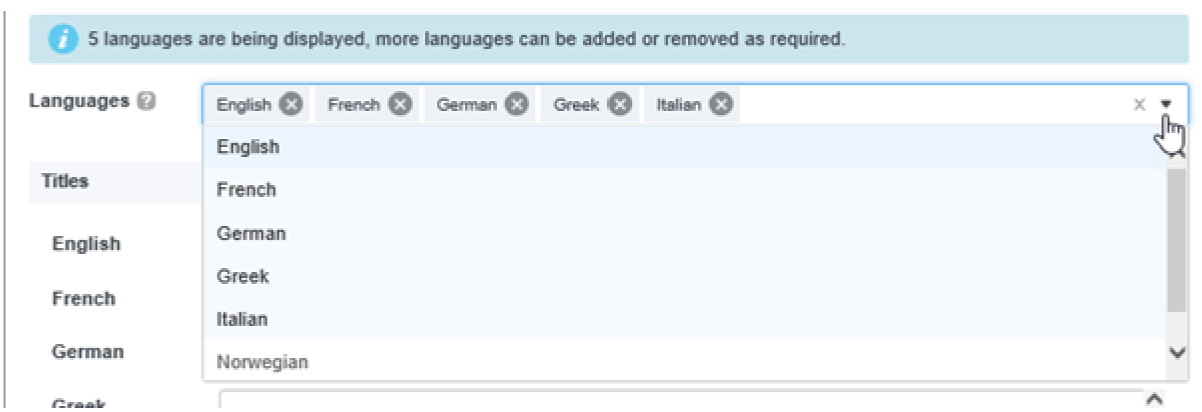


Figure 129 Five languages are displayed, you can select more

If the “Advanced answer setting” option is enabled (see Advanced Answer Settings on page 151 for more information), the code will appear as the first column, followed by the different language texts for lists and scales.

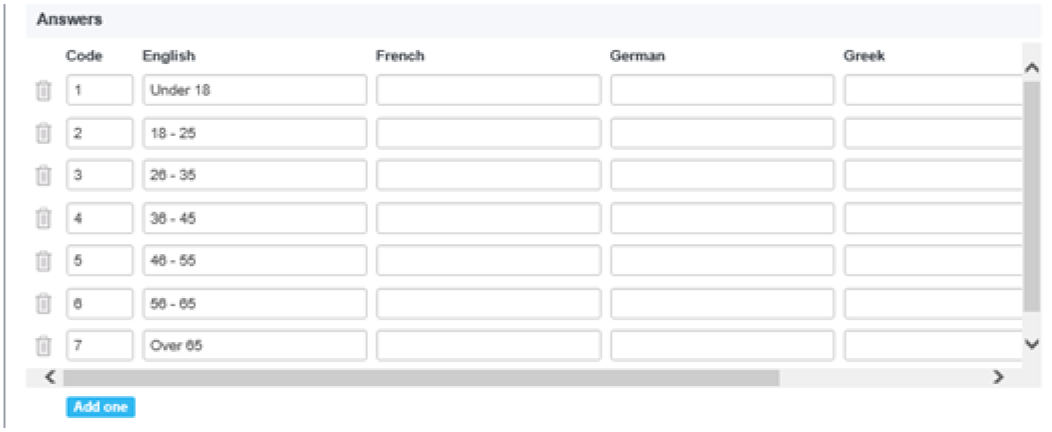


Figure 130 Example of an answer list showing codes and several languages

The Translate tab is available for individual and bulk node editing, reusable lists, loops and stop nodes. Pasting of texts is also supported, and you can paste multiple columns of text in the list areas (one column for each language).

4.8.7. The Display Logic Tab

This functionality allows users with little or no scripting experience to quickly and easily apply display logic to a question using Survey Designer's condition builder. The functionality supports all of the capabilities that the condition builder delivers, including the creation of complex combination filters with groups of conditions.

1. In a question's Details page, click the **Display logic** tab.

   The overlay opens with the **Add condition** button.

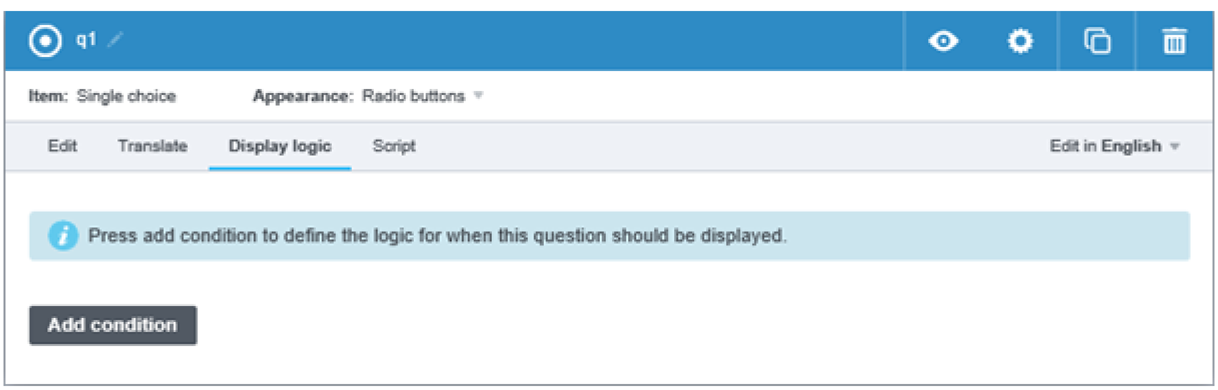


Figure 131 Example of the Display Logic overlay for a single question

2. Click **Add condition**.

   The Details overlay opens.

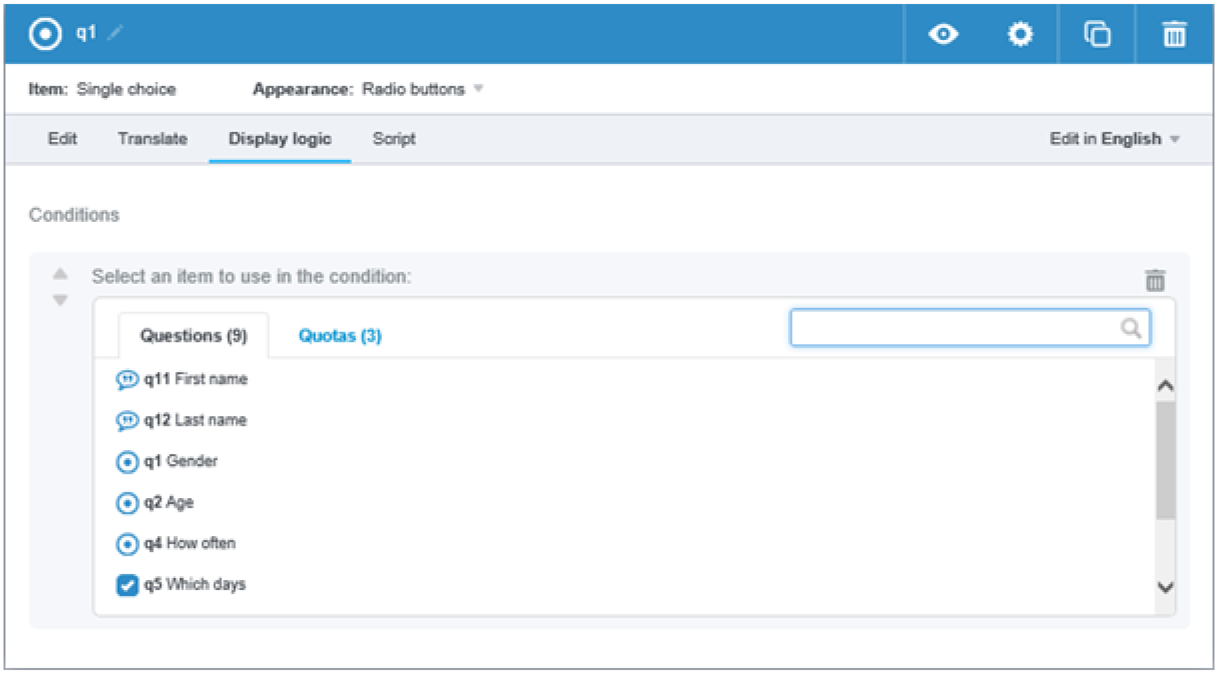


Figure 132 The details page for the condition

This shows a list of all the questions and quotas in the survey on which the condition can be based. The totals of each are given in the tab headers; in this case 9 questions and 3 quotas are available. The questions are listed in the order in which they appear in the survey.

If you have a large number of questions in your survey, then the first 50 will be listed. You can filter the questions to reduce the list to find the question(s) you wish to work with. To do this, type characters into the search field; the filter will update the list of questions as you type to show only those questions that include the entered character string. The search field is not case-sensitive.

3. From the lists of questions and quotas, select the item that you wish to build the condition on.
4. Select the desired Response criteria, and the answer option(s) you wish to use in the condition.
5. On completion, click **Done**.

   The condition is created.

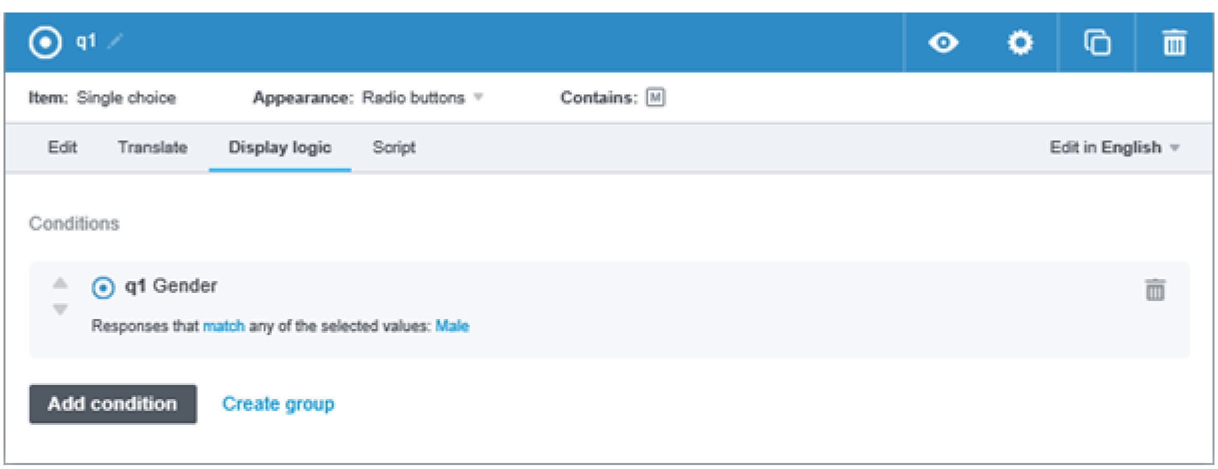


Figure 133 The Display logic tab with the condition

If the question on which you are basing the condition is on a page, and the condition references other questions on the same page, then the condition will automatically set those questions as triggers (see Triggering Questions on page 173 for more information). This will cause the page's logic to be re-evaluated when those questions are answered, providing the respondent with a dynamic experience.

Further details are given in the Conditions section (see Conditions on page 160 for more information).

Note that you can still use conventional script-based masking, and if you have scripting in place it will take precedence over the conditional-builder based logic.

4.8.8. Text Substitution or Response Piping

Use text substitution (piping) to retrieve a respondent's answers from one question and insert them into the wording of another question. This allows you for example to include the respondent's name or a product he/she has selected in the text of a later question. You can achieve this manually by typing the appropriate code into the text field (see Manual Piping on page 108 for more information), or you can create the code automatically by dragging a question from the Survey column and dropping it into the text field (see Drag-and-Drop Piping on page 108 for more information) or by selecting the questions to be used (see Piping Assistance on page 109 for more information). You can also use conditional piping to for example add predefined text to a question if the respondent has selected a specific answer to an earlier question (see Conditional Piping on page 113 for more information).

This text substitution or piping can be used in all text fields (Title, Text, Instruction and Answer list/scale) but not in script nodes, conditions, code/column masks or validation code fields. Further information on the scripting functionality is available in the Confirmit Horizons Scripting Manual.

4.8.8.1. Manual Piping

Piping uses the caret **^** character, also known as "hat", in front of and after a JScript .NET expression. "Manual" piping requires you to type the required script into the appropriate text field.

For example, after the respondent has picked a favorite car in question q3, we want to ask how many times he or she has test-driven that car. We can pipe the name of the car into the text of the question and use the "hat" notation as follows:

```
^f("q3")^
```

The resulting question in this case could be:

```
How many times have you test-driven the ^f("q3")^?
```

4.8.8.2. Drag-and-Drop Piping

Survey Designer allows you to create piping by drag-and-drop.

1. Open the question into which you want to pipe the text/value from a previous question.
2. Click on the question in the Survey column and drag it into the appropriate text field.

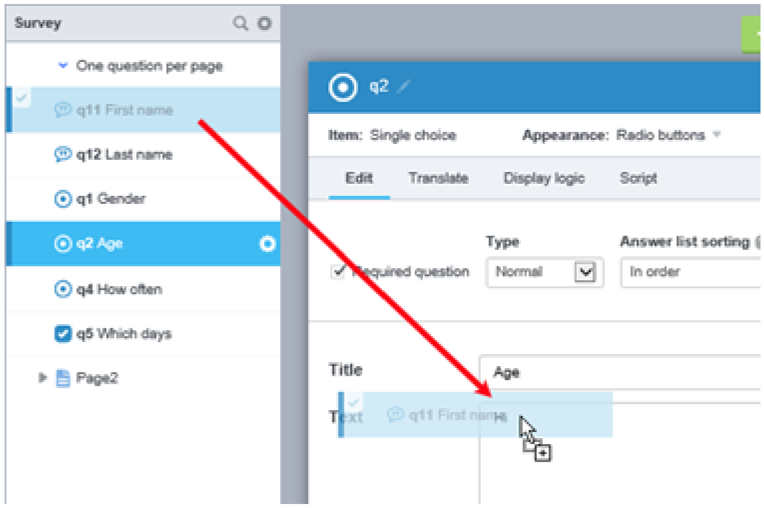


Figure 134 Dragging and dropping one question into another

The result is the correct script placed automatically into the text field . You can then add the appropriate text to complete the question. If you have already added some text to the field then the script is added at the cursor location.

Figure 135 The resulting script

4.8.8.3. Piping Assistance

Piping Assistance allows you to create more complex piping script without having to be an expert coder. This functionality is available when the rich text editor is open, so it is available for Title, Text and Instruction fields.

1. Open the question into which you want to add the piping, click into the appropriate text field at the location where you want to add the piping, and click the **Pipe answers** button in the rich text editor toolbar.

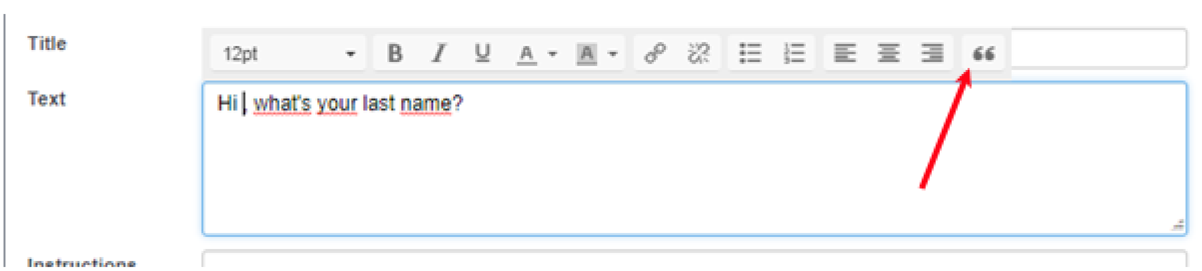


Figure 136 The Pipe answers button

The Pipe answers overlay opens.

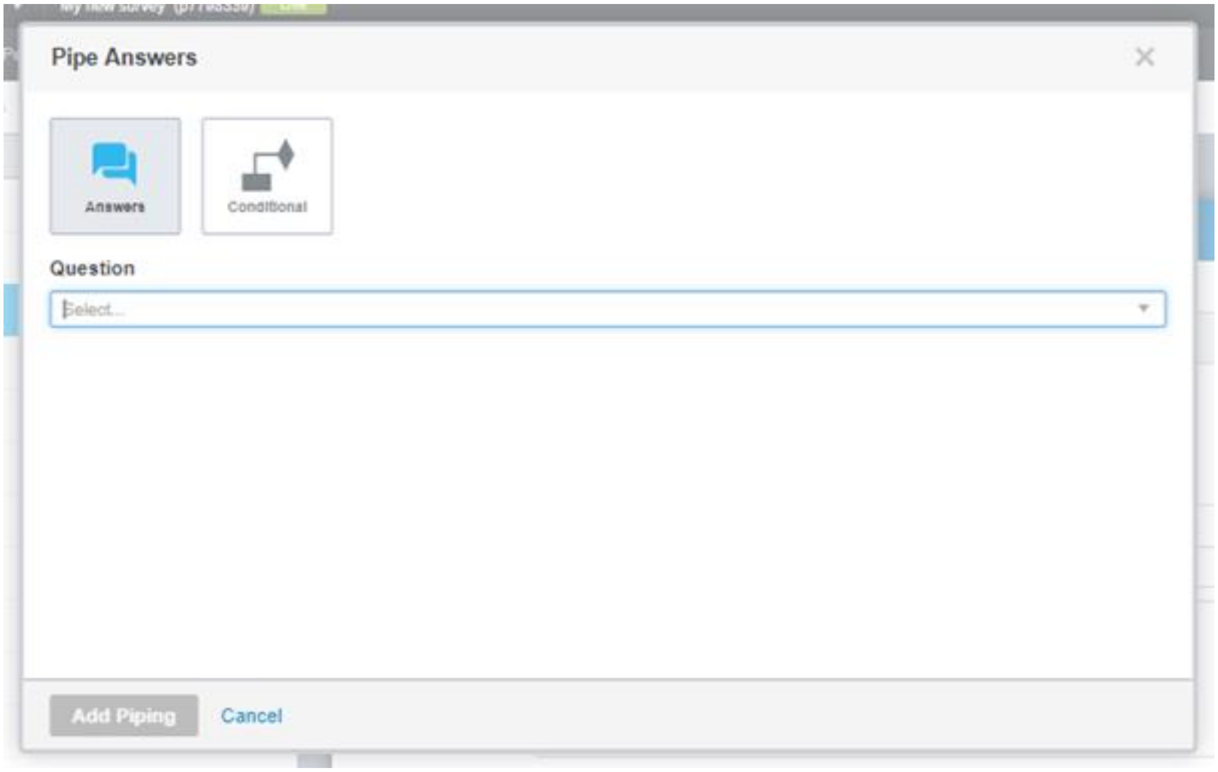


Figure 137 The Pipe answers overlay

2. Open the Select drop-down to see a list of the questions available to be piped, then select the question you wish to use.

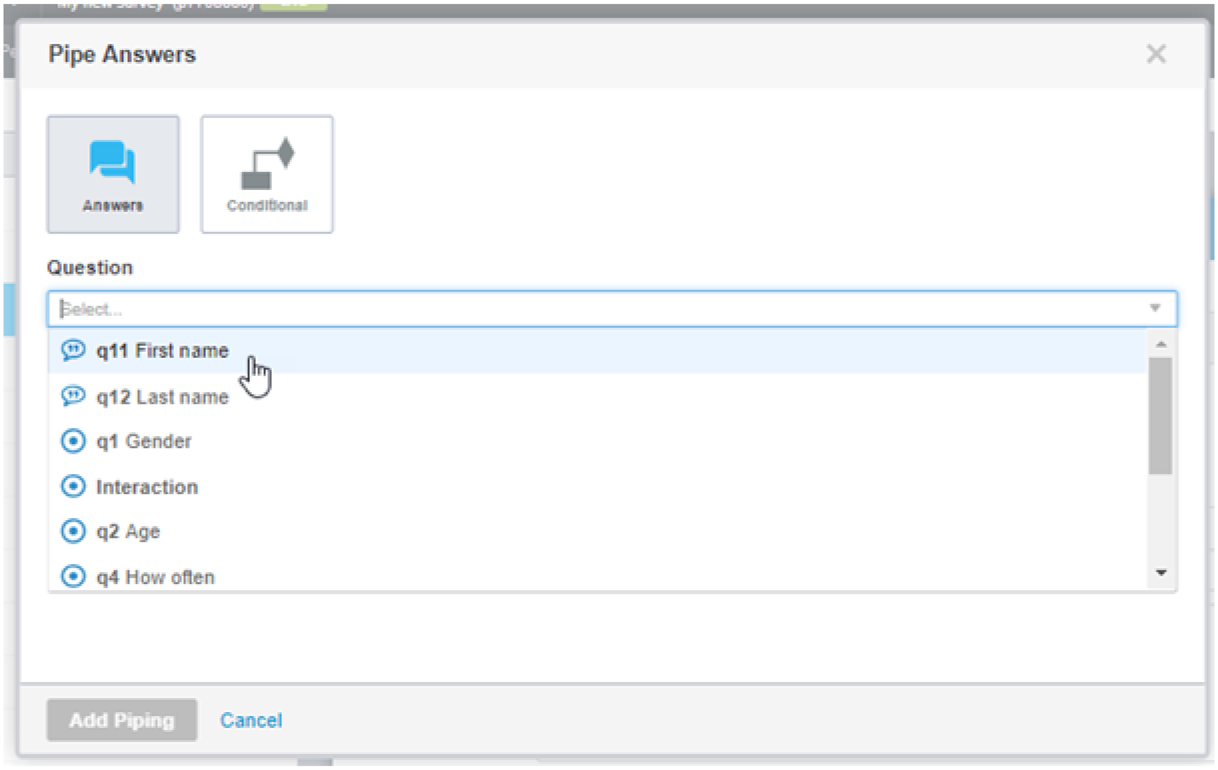


Figure 138 Selecting the question to be used in the piping

If the question you choose only has open text or selectable answers, then you can click **Add piping** to add the piping script to the text.

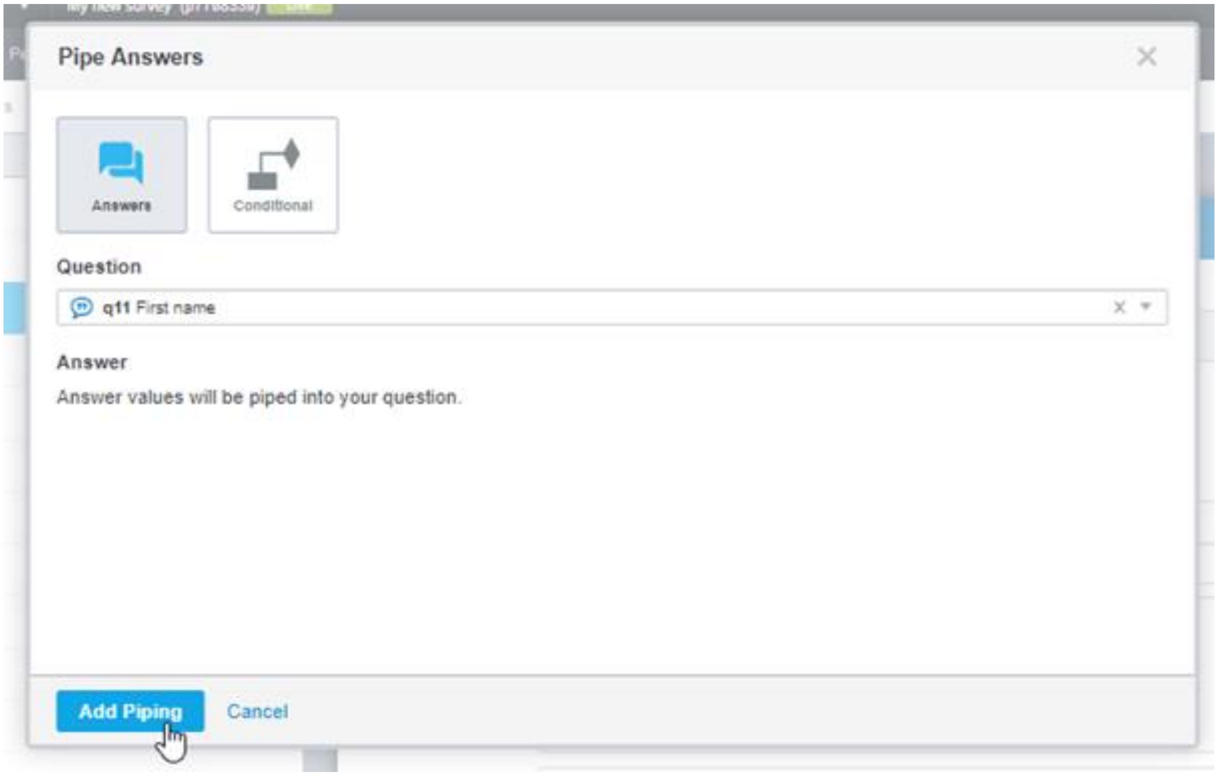


Figure 139 Example of a question with only selectable answers

The script in this case will then be relatively simple, as for example:

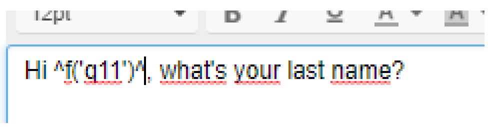


Figure 140 Example of piping for a simple question

If the question you choose also includes an "Other - specify" answer option (the **Add "Other" field** property box for an answer is checked) then an additional property becomes available.

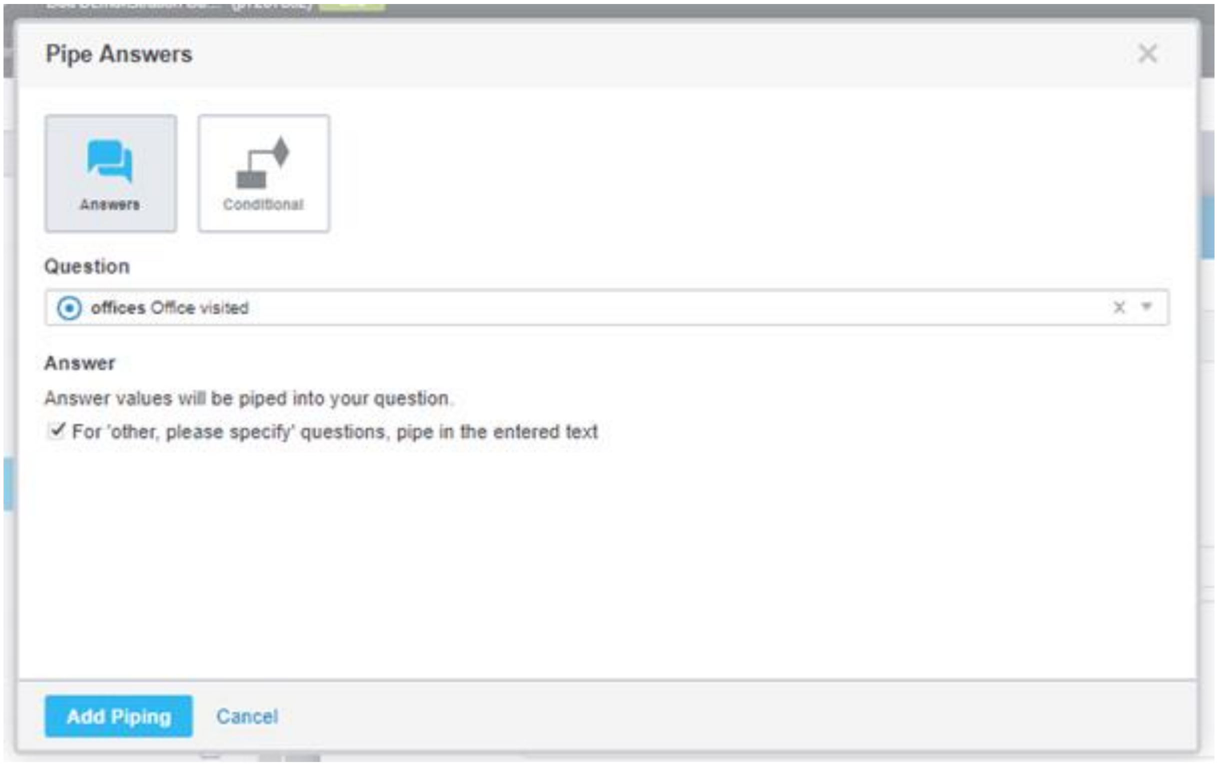


Figure 141 A question with an "Other-specify" answer option

Here, if the respondent selects the "Other - specify" answer option and types in some text, you can choose whether to pipe in the option text (for example "Other - specify") or the text the respondent has typed into the field. If you deselect the option thereby choosing not to pipe in the entered text, the script added to the question text will be the same as if the Other-specify option was a "standard" answer. If you choose to pipe in the entered text, additional script is added, as:

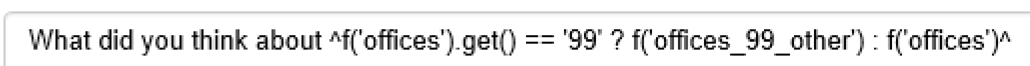


Figure 142 Example of the piping script when the entered text is to be piped in

4.8.8.4. Conditional Piping

You can also use conditional piping to for example add predefined text to a question if the respondent has selected a specific answer to an earlier question. As a condition can evaluate to either "true" or "false", the question the condition is based on needs to be a single question with two answers.

Note: Once the conditional piping script is added to a text field, it cannot be edited using the piping functionality. If you need to change the script, you can only edit it manually or delete it and start again.

In this example, a customer has contacted a retailer and the retailer is now asking the customer to provide some feedback about the service he/she received during the contact. The customer could have contacted the retailer either by telephone or by email, and the retailer wants to present the appropriate text in the question. This is achieved using conditional piping.

1. Open the question into which you want to add the piping, click into the appropriate text field at the location where you want to add the piping, and click the **Pipe answers** button in the rich text editor toolbar.

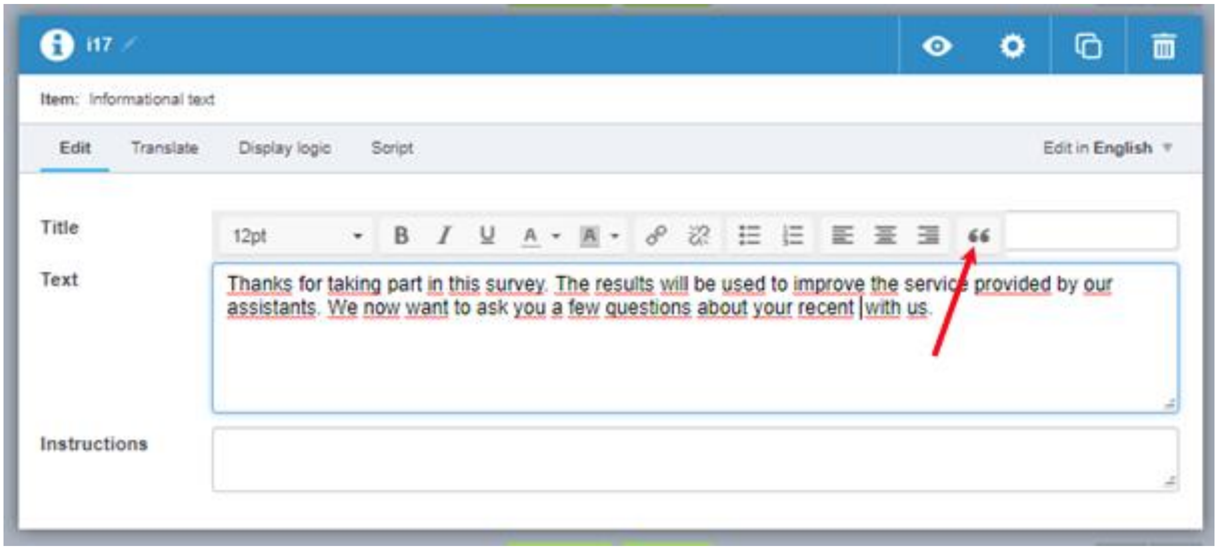


Figure 143 The Pipe answers button

The Pipe answers overlay opens.

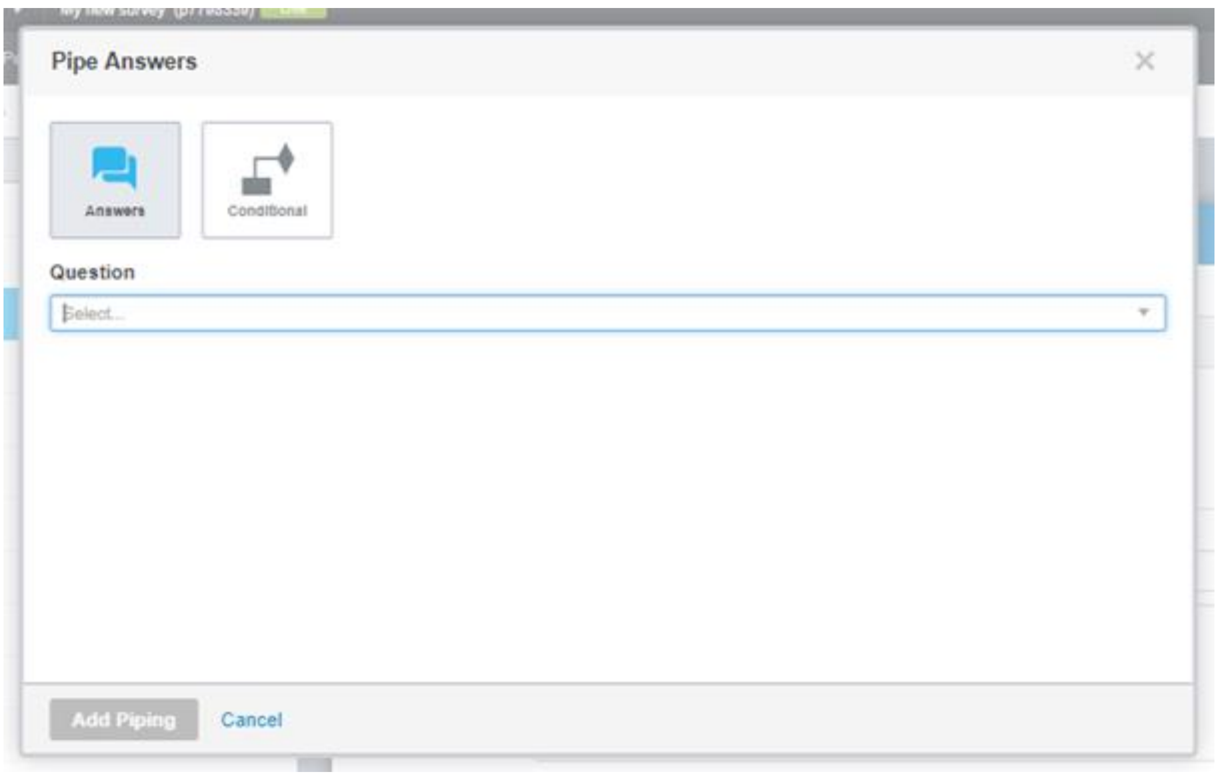


Figure 144 The Pipe answers overlay

2. Click the **Conditional** icon.

   The **Add condition** button appears.

3. Click **Add condition** to open the question selection list.

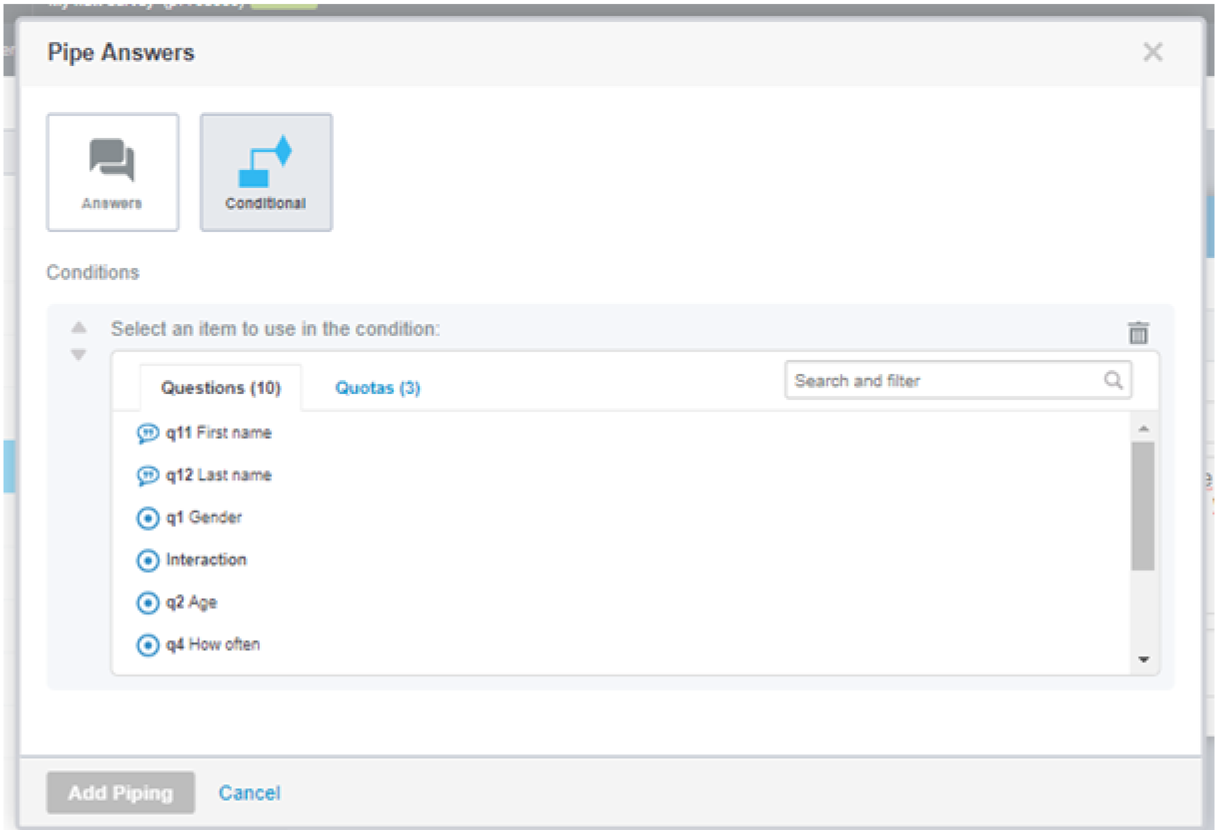


Figure 145 Example of the list of questions available for this condition

4. Select the question you want to use in the condition.

   The answers available for that question are presented.

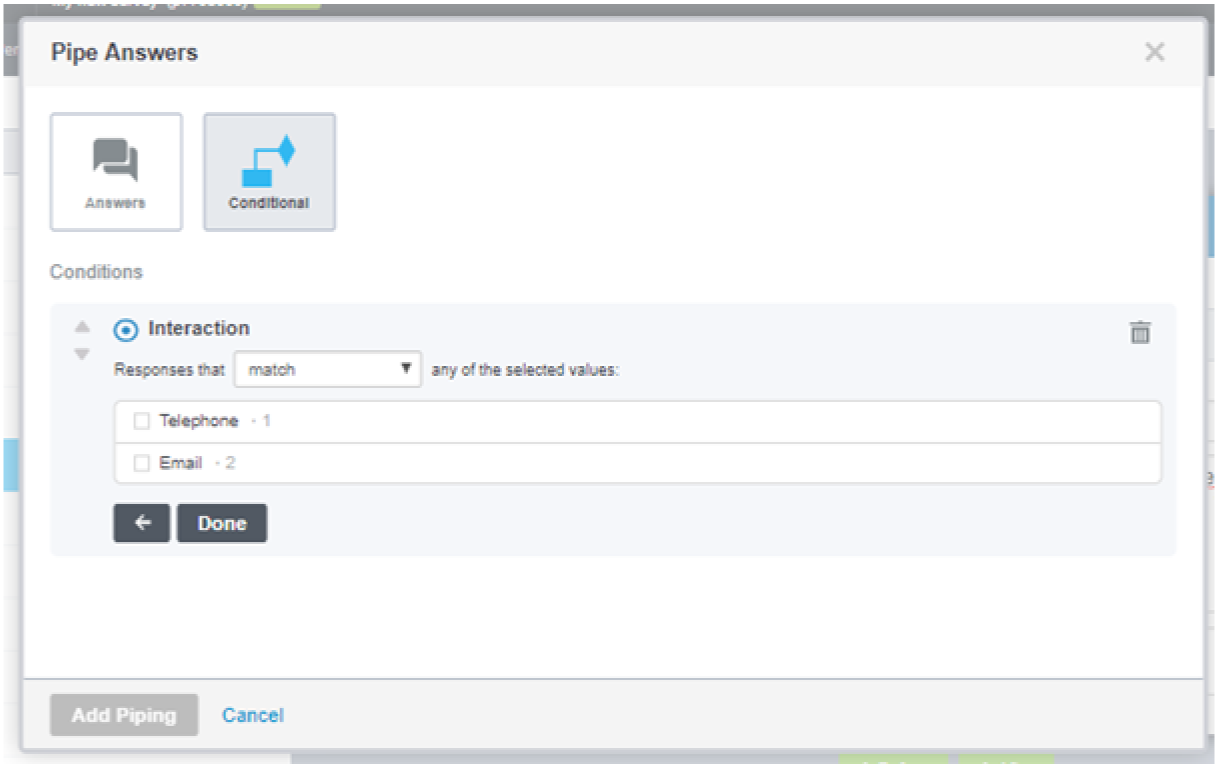


Figure 146 Example of the answer list for the selected question

5. Check the answer you want to be the "true" result.

   You can now add the text you want to display when the condition evaluates to True and False. In this case, if the respondent contacted the retailer via telephone, then we want the text **telephone conversation** to appear, otherwise, we want the text **email exchange** to appear.

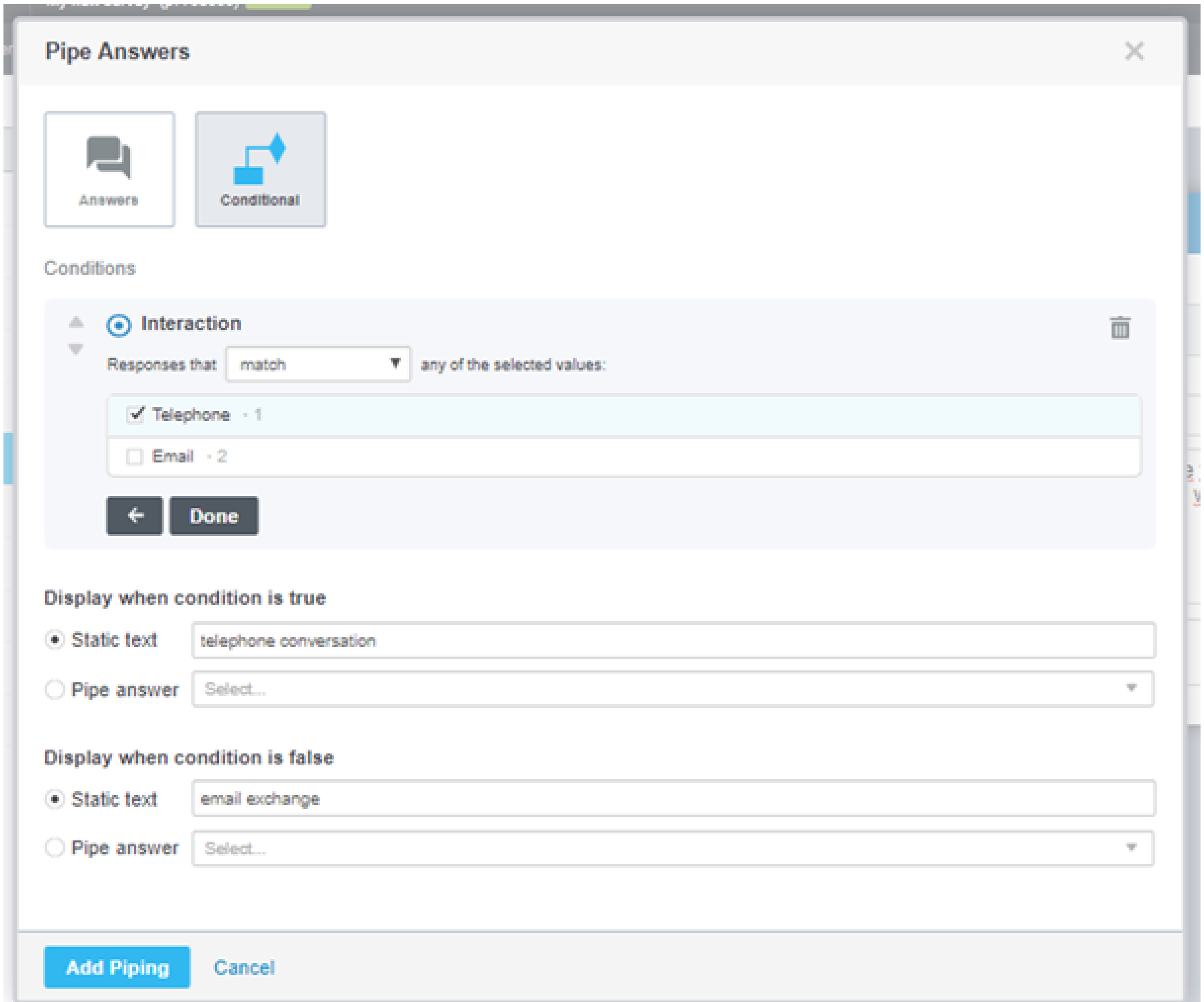


Figure 147 Adding the text to be displayed when the condition evaluates to True and False

Note that you can add further piping here.

6. On completion, click **Add piping**.

The resulting conditional piping is:

```
Thanks for taking part in this survey. The results will be used to improve the service provided by our
assistants. We now want to ask you a few questions about your recent ^( f('Interaction').any('1') ) ?
"telephone conversation" : "email exchange"^ with us.
```

And the question as seen by the respondent will be (if he/she has stated they contacted the retailer via telephone):

Thanks for taking part in this survey. The results will be used to improve the service provided by our assistants. We now want to ask you a few questions about your recent telephone conversation with us.

4.8.9. Preview

The question details overlay for each question holds a **Preview** icon towards the upper-right corner . Click this icon to open the Preview page. This shows you what the respondent will see for this question. The layout selected for the survey is applied. If you make changes to the question, the preview page will be updated in real-time.

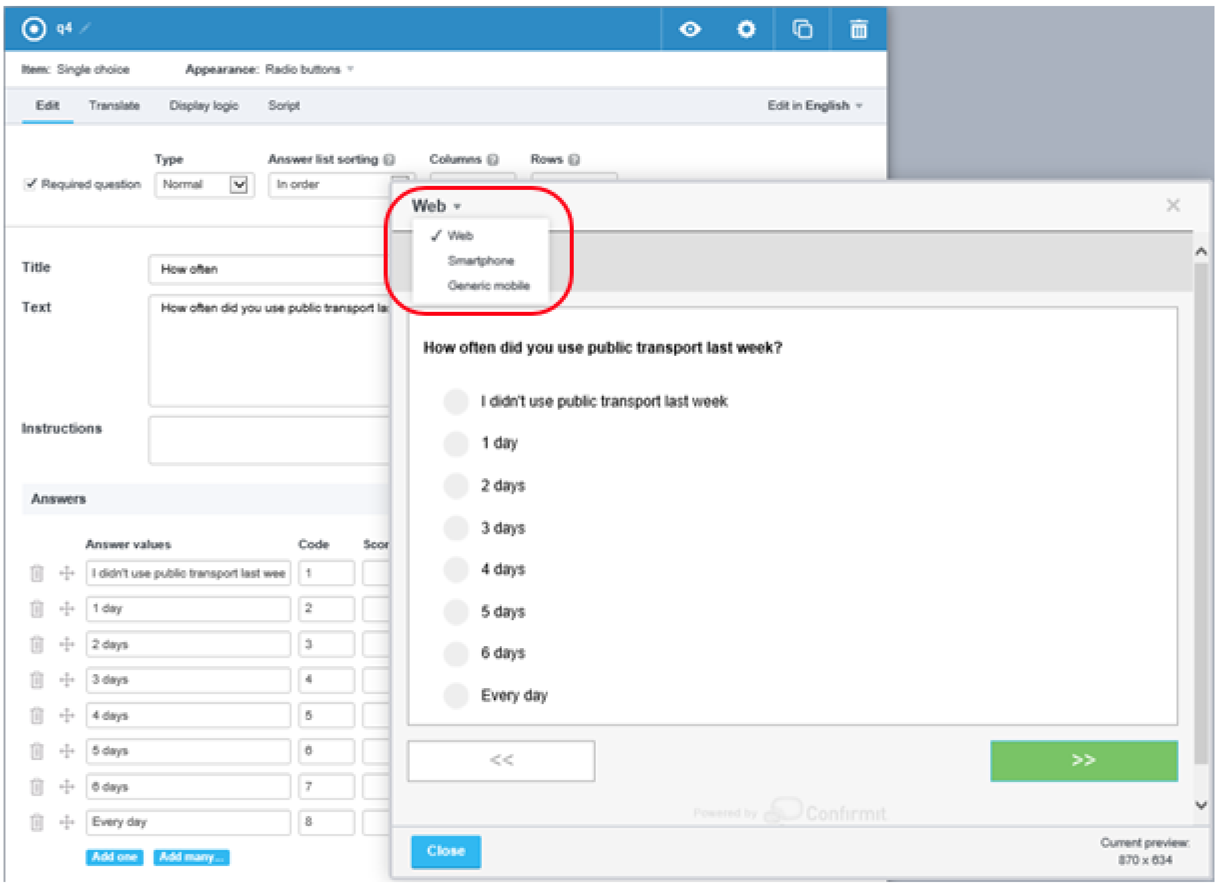


Figure 148 Example of the preview page in Web rendering

If you have selected more than one presentation mode for the survey (in the Overview page > Settings area (see The Settings Area on page 29 for more information)), then in the upper left corner of the preview page is a drop-down menu listing the mode options you have selected (circled above). Here you can choose how you want the preview to be rendered.

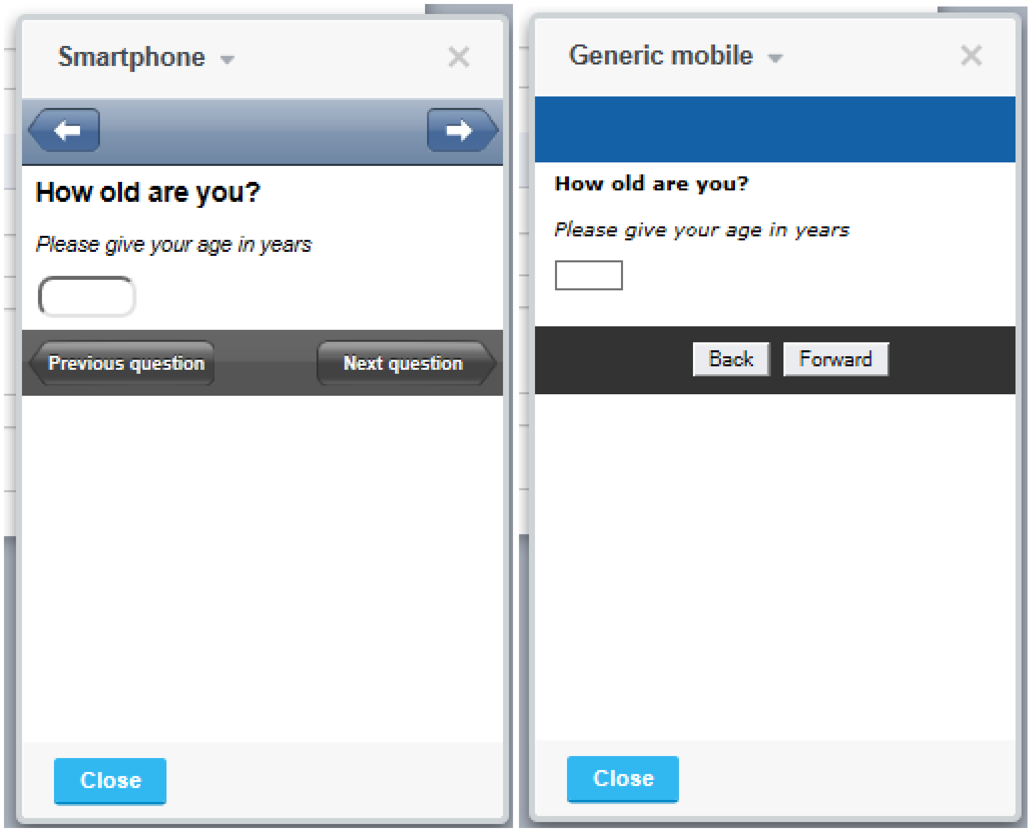


Figure 149 Examples of the preview page for Smartphone and Generic mobile

The preview page opens by default at Web rendering. If you have other options available and you change the rendering mode then your selected mode is remembered the next time you open the preview page for that survey.

4.9. Moving Items Within the Survey

If you need to move a question or a node to a different location in the survey:

1. In the survey designer column, click on the item that you wish to move and drag it to it's new location.

   A blue area appears in the survey column to indicate where the item will be placed when you drop it.

2. When the item is in the desired location, drop it into position.

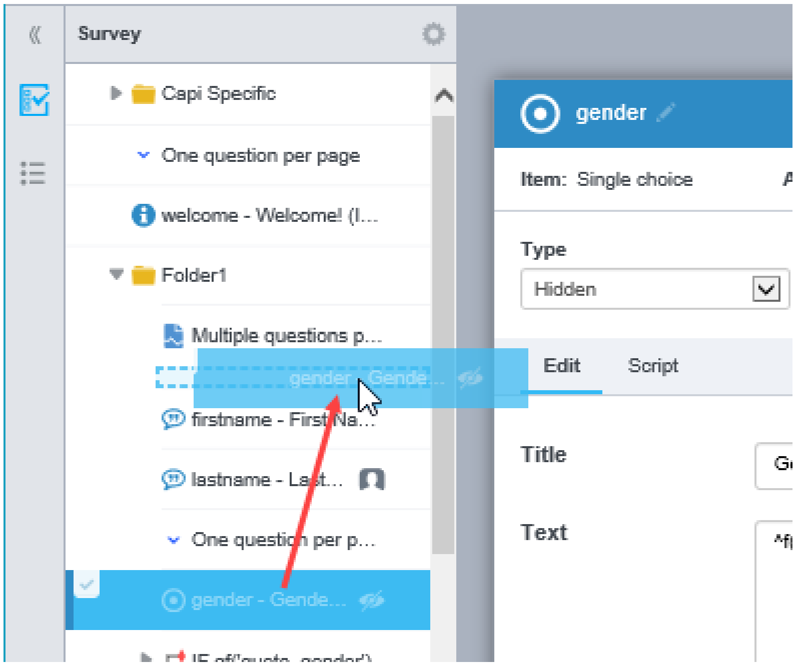


Figure 150 Dragging an item to a different location in the survey

If while you are dragging an item you decide it should not be moved (maybe you took the wrong item), press the **Escape** key on your keyboard before you drop the item to cancel the drag operation.

If you move an item by mistake, as the change is being saved an **Undo move** button will be available towards the right end of the Save message and you will have a few seconds in which you will be able to undo the change. Once the change is saved and the message closes you will have to either move the item "manually" or go to the change log on the Overview page and use the Undo feature (see The Designer Log on page 24 for more information).

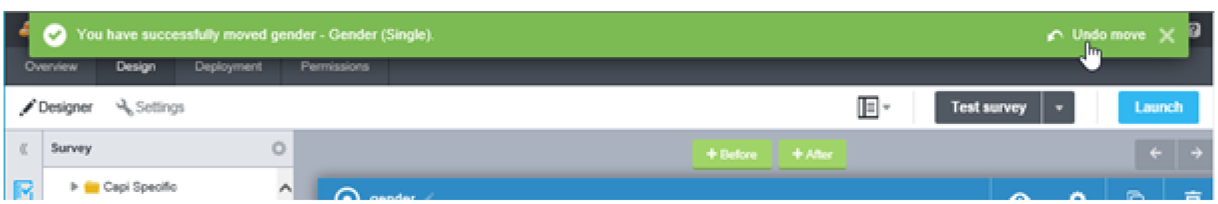


Figure 151 The Undo move button in the save message

Note that you can select multiple items in the survey and move then simultaneously (see Selecting Multiple Items in a Survey on page 124 for more information).

4.10. Converting Items

You can convert some types of items to be a different type, for example you can convert a multi choice item into a single choice. To do this:

In the Designer page, **either**:

1. Open the question you wish to convert.
2. In the upper-left corner of the question details page, click the item type to open the selection drop-down.

   A list is displayed of the item types to which you can convert the current item.

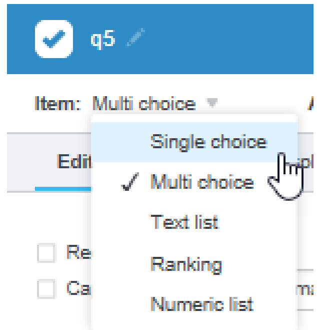


Figure 152 Converting an item to a different type

3. Select the type you wish to convert the item to.
4. Confirm the conversion if necessary.

Important
For some types of conversion, if the question or item you are converting already has data, converting it to a different type will delete that data. In these cases you will be asked to confirm the conversion.

Or:

1. In the Survey column, click on the **Edit** icon for the question you wish to convert to open the Edit menu for that question.

   The Edit menu contains a list of the item types to which you can convert the current item.

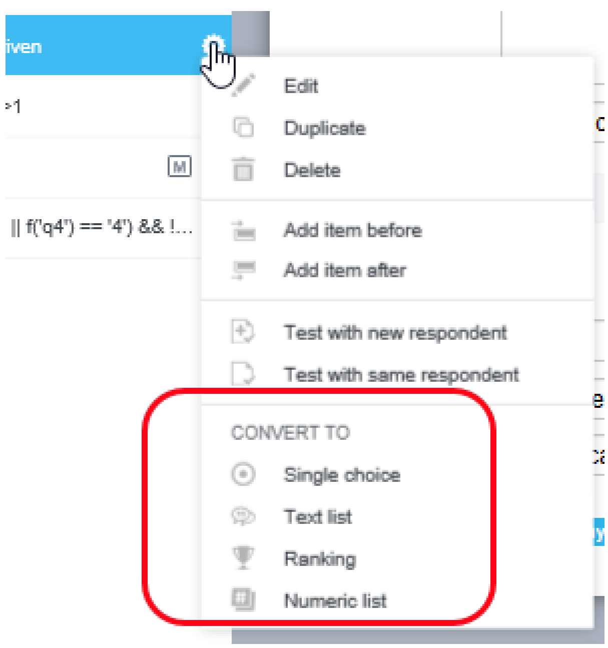


Figure 153 Converting an item to a different type

2. Select the type you wish to convert the item to.
3. Confirm the conversion if necessary - see the Important note above.

4.11. Duplicating Items

If you wish to add to your survey an item that is very similar to one that you have already created, you can save time by duplicating the existing item and then edit the duplicate. To create a duplicate, either left-click on the item's **Edit** icon in the Survey column to open its drop-down menu and select **Duplicate**, or open the item and click the **Duplicate** button in the upper-right corner of the question details page.

A new item of the same type as the original and with the same settings, title, text instructions and answers is created and placed after the original in the survey. The only difference will be the qid - the new item will have the next qid in the sequence. You can now edit the new item as required (see Editing an Item on page 100 for more information), and move it to the desired location in the survey (see Moving Items Within the Survey on page 119 for more information).

Note that you can select multiple items in the survey and duplicate them simultaneously (see Selecting Multiple Items in a Survey on page 124 for more information). In this case, if you select **Duplicate** from the options overlay in the editing pane then the duplicated items will be placed immediately after the last item selected. If you click the overflow menu icon for one of the selected items in the Survey column then select **Duplicate to here** from the drop-down menu, then the duplicate items will be placed immediately after that item in the Survey column.

4.12. Deleting and Restoring Items

If you wish to delete an item from the survey for any reason:

1. Either open the item and click the **Delete** button in the upper-right corner of the question details page, or in the Survey column click the overflow menu icon for the item you wish to delete and select **Delete** from the drop-down menu.

   A confirmation box is displayed.

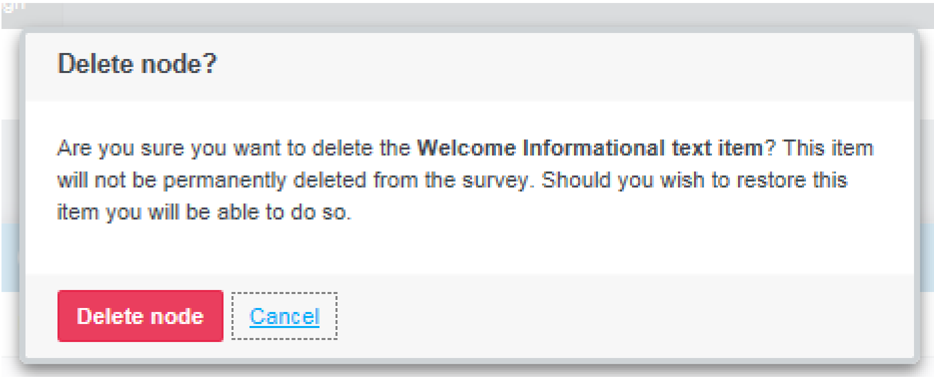


Figure 154 The confirm deletion message box

2. Confirm the deletion or cancel the operation.

   Note that the item is not yet permanently deleted (see the bottom of this section) so if you later regret the deletion you can restore the item.

If you later wish to restore an item:

1. Click on the overflow menu icon towards the right side of the Survey column header.

   The Survey menu opens.

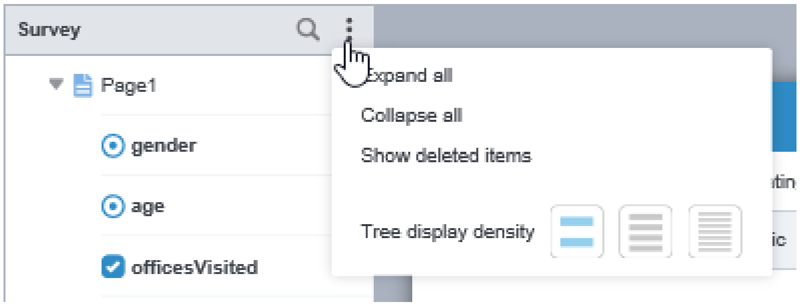


Figure 155 The Survey menu

2. Click **Show deleted items**.

Note: This control toggles between Show deleted items and Hide deleted items, depending on the current state.

Any items that have been deleted are then displayed in the Survey pane grayed out, see "age" below.

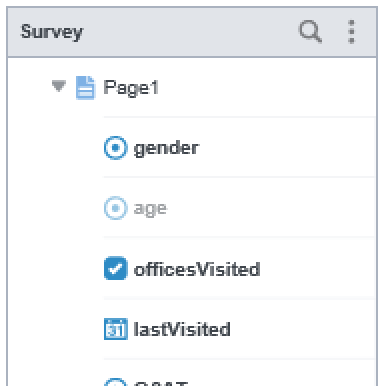


Figure 156 Any deleted items are displayed grayed out

3. Place the pointer onto the item you wish to restore to show the overflow menu icon, then click the icon to open the menu.

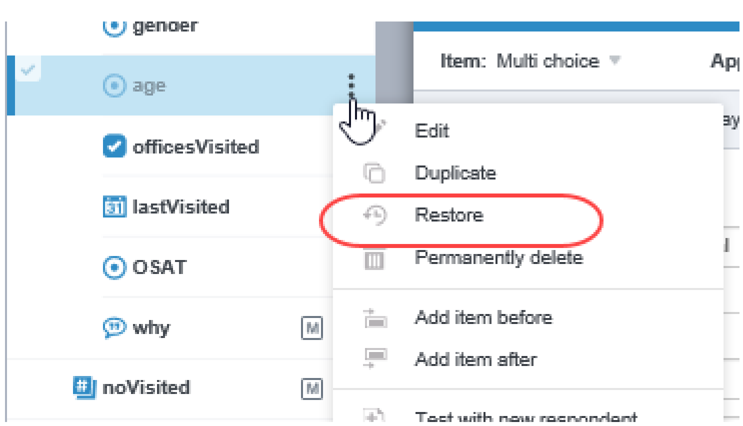


Figure 157 The survey item's overflow menu

4. Click **Restore** to restore the deleted item to the survey.

To permanently delete an item, click **Permanently delete**. The item is then removed from the survey and cannot be restored later.

4.13. Selecting Multiple Items in a Survey

You can select then move, duplicate, delete or adjust question details and common properties for multiple items in a survey simultaneously. To select multiple items:

1. Hover the mouse pointer over an item in the Survey column.

   The item is highlighted, and a check box appears at the left side of the item.

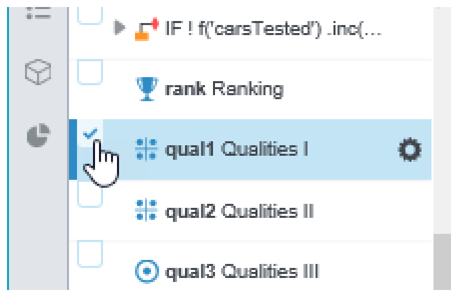


Figure 158 The check box

2. Click in the check box to select it.

   When you do this, a message box appears in the editing area to inform you of how many items you have selected, and which options are now available to you. **Duplicate** and **Delete** become available once you have selected one item.

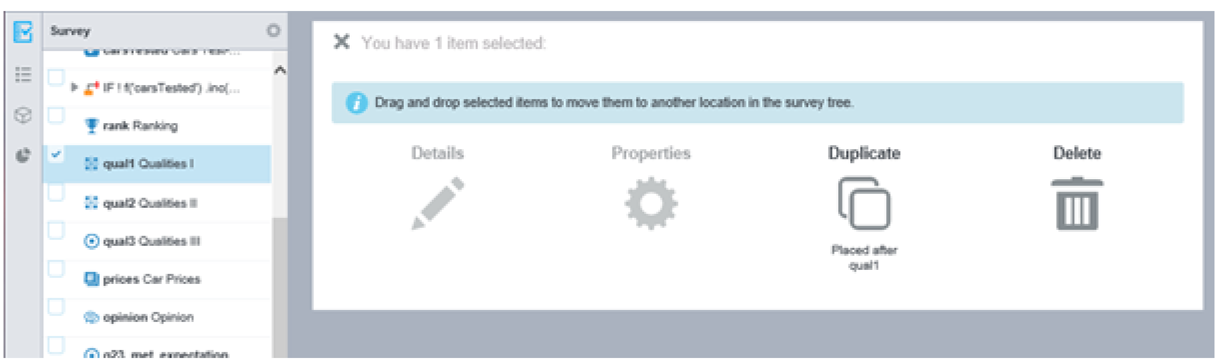


Figure 159 The message box

3. Repeat the process for each item you wish to select.

   Details and **Properties** become available once you have selected two or more items.

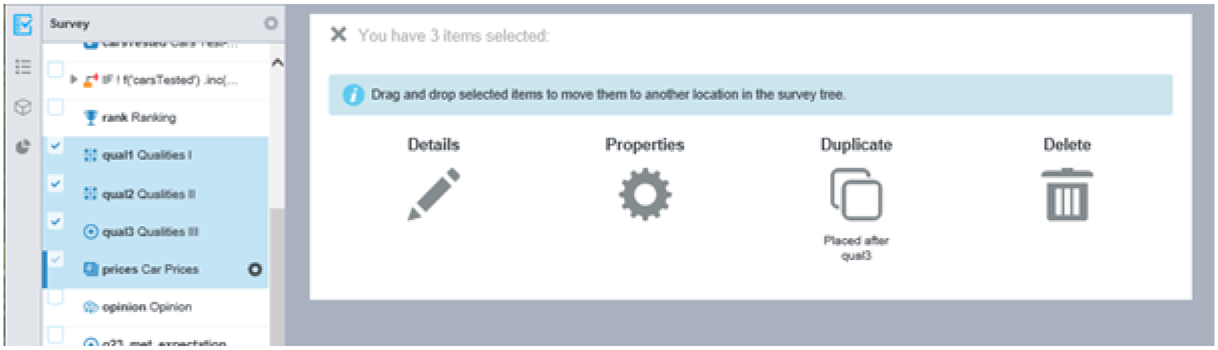


Figure 160 Selecting several items

You can now drag the selected items to a different location in the column, or click the **Details**, **Properties**, **Duplicate** or **Delete** buttons in the message box as appropriate. Note that to drag-and-drop multiple items, they must all be at the same level in the survey.

- If you select **Details**, the Details pages for all of the selected questions opens in the editing area, allowing you to adjust the details for those questions (see Editing Details for Multiple Items on page 125 for more information).
- If you select **Properties**, a page listing the properties that are common to all the selected survey items opens in the Design area (see Editing Properties for Multiple Items on page 125 for more information). Here you can edit the common properties as required.
- If you select **Duplicate**, the duplicate items are placed immediately after the last item selected. A text informing you of where in the column the duplicate items will be placed appears below the **Duplicate** button (see Duplicating Items on page 122 for more information). Note that if you click the overflow menu icon for one of the selected items in the Survey column, you get the menu option **Duplicate to here**. If you select this option then the duplicate items will be placed immediately after that item in the Survey column.
- If you select **Delete**, then you are asked to confirm the deletion. Once confirmed, the selected questions will be soft-deleted from the survey (see Deleting and Restoring Items on page 122 for more information).

To deselect all the selected items, press the **Esc** button on your keyboard or click the **X** button in the upper-left corner of the editing area.

4.13.1. Editing Details for Multiple Items

When you select multiple items in a survey (see Selecting Multiple Items in a Survey on page 124 for more information) and then click the **Details** option, the question details pages for all the selected items are presented in the editing page in the order in which they appear in the survey. The number of items selected is displayed at the top of the page, and the selected items are highlighted in the Survey column.

You can now edit the items as required, and all changes are auto-saved. Note that you cannot change texts in multiple items simultaneously; changes must be made individually for each item.

To reduce the amount of space each item takes in the editing area, answer, prompt and scale item lists are initially closed. If you wish to view or edit these, you can open them by clicking the links in the details pages.

4.13.2. Editing Properties for Multiple Items

When you select multiple items in a survey (see Selecting Multiple Items in a Survey on page 124 for more information) and then click the **Properties** option, a page listing the properties that are common to all the selected survey items opens in the Design area. The number of survey items selected is displayed at the top of the page, and the selected items are highlighted in the Survey column.

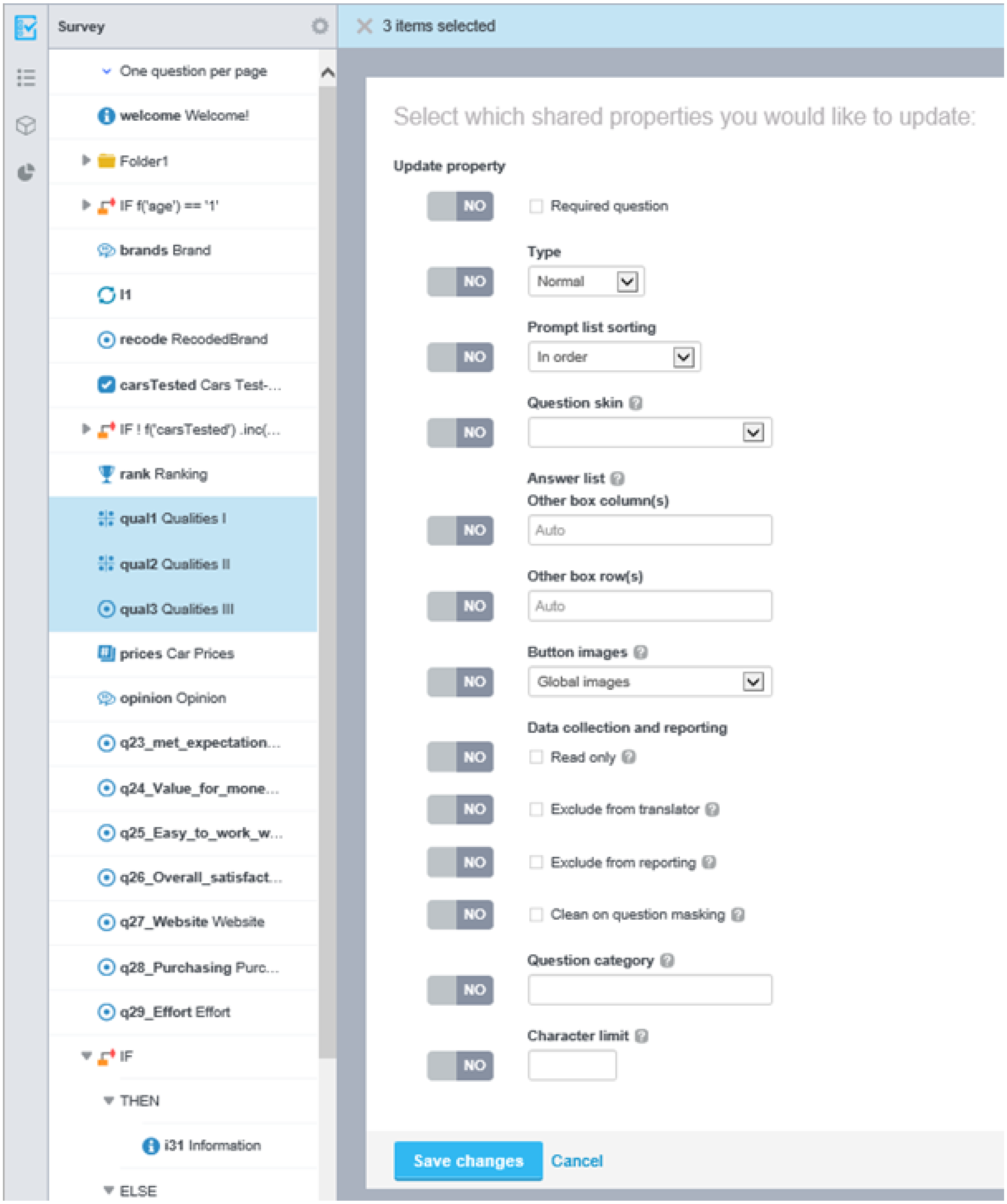


Figure 161 Editing the properties for multiple survey items

1. Click on the **Update property** switch for a property you wish to update and then make the required setting for that property, or change the property and the switch will change automatically.
2. On completion, click **Save changes**.

Note: Changes made using this "multi-selection" functionality are not saved automatically.

4.14. Question Properties

Each question has a number of properties and options appropriate to the type of question. These allow you to set up the question such that it looks and functions as you wish. To view and edit a question's properties, click on the question in the survey to open the Question Details overlay (see Properties on the Question Details Overlay on page 127 for more information). Note that you can re-size the Question Details overlay as required to provide more space for your texts etc.; drag the right border.

The Question Details overlay for each question has two tabs.

- The Edit tab holds a number of the most-used properties for the question whilst the remainder of the properties are listed on a separate property sheet accessible via the **Properties** icon in the question details page toolbar (see The Properties Sheet on page 139 for more information).
- The Script tab allows you to use scripting to provided code masking, and validation for all question types except Info, and to add JavaScript to all question types except 3D-Grid (see Scripting in Questions on page 169 for more information).

4.14.1. Properties on the Question Details Overlay

To display a question's properties, start by clicking on the question in the survey column to open the Question Details overlay. A number of the most-used properties are provided on this page, whilst the remainder are listed on a separate property sheet accessible via the **Properties** icon in the question details page toolbar (see The Properties Sheet on page 139 for more information). Note that the properties are not duplicated; they will be located either on the question details page, or on the properties sheet - not both. Note also that you can re-size the Question Details overlay as required to provide more space for your texts etc.; drag the right border.

As many of the properties on the question details page are identical for the various question types, all the properties available on the pages for all the question types are listed and described here. The question types to which each property applies are noted beside the property.

- **Appearance -** [Not Open text list, Info or Date]. This defines how the question is to appear to the respondent. The options available depend on the type of question (see The Appearance Options on page 130 for more information). Click on **Appearance** and select the required option from the drop-down menu.
- **Required question -** [Not Info]. Check to require the respondent to provide an answer to the question before he/she can proceed to the next question.
- **Capture Order -** [Multi]. Check this box to allow the order in which categories are selected to be accessed using scripting functions. The Confirmit Scripting manual describes the use of these functions: AnswerOrder() First() and Nth(). Note that when this property is enabled, at least one category must be selected to continue past the question. Capture order relies on client side scripting. If the browser you are using does not support this, the question will default to a ranking question (input number rank values). To the respondent, the question will appear as a normal multi/list. This feature is primarily for use in the CATI environment.
- **Type -** [Not Info, Numeric list, 3D-Grid]. The question Type specifies whether or not it will be visible to the respondent and how the information is used. The options are:
    - **Normal -** (default) an ordinary question that will be presented to the respondent so that he/she can provide their answer.
    - **Hidden -** [Single, Multi, Open, Grid] the question is hidden from the respondent i.e. it is never displayed in the survey. However its value may be set from script-nodes, making for example, "on-the-fly"-recoding possible. It is used for internal programming purposes or for reporting when you need to store a calculated variable which is used for example as a filter in a question or for arithmetic calculations on some of the respondent's answers.
    - **Background -** background variables are by default hidden. The question will not be displayed in the survey, but will obtain its value from the respondent list. This can be very useful when you have information about your respondents that you want to apply in the logic of your survey. Note that the respondent list must contain a column with a name equal to the question ID.
    - **Recoded -** turns this question into a recoded variable, which will not be displayed in the interview. You can predefine complex recoding rules in SQL or JScript.

- **Answer list sorting –** [Single, Multi, Ranking, Multi-Grid, 3D-Grid, Loop] controls the display order of the answer list elements in each group. If groups are not used, then this controls the display order of the entire answer list. The items can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order (go to Randomization for more information).
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).

  If the list does not contain any Group heading items, then Answer list sorting controls the order of all the items in the list. When the answer list contains Group headings, Answer list sorting controls the order in which the items inside each group are displayed. The order of the groups is then controlled by the Group display order.
- **Field width -** [Loop] the number of characters assigned to responses in the database when exporting.
- **Progress bar weight -** [Loop] input a value for the estimated number of iterations through the loop that will be performed by a respondent when answering the loop question. For example, if you are inviting the respondent to provide information regarding five different products, then the respondent will go around the loop five times so you would input 5 in this field. Then, in the event a progress bar is used for the survey, this setting will increment the progress bar an appropriate distance while the loop question is being answered.
- **Prompt list sorting –** [Grid]. This controls the display order of the prompt list. The items can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order (go to Randomization for more information).
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).
- **Group sorting –** [Grid, 3D-Grid]. If the prompt list is organized into groups, these properties control the display order of the groups. The groups can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order (go to Randomization for more information).
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).
- **Scale sorting –** [Grid]. This controls the display order of the scale list. The scale items can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order (go to Randomization for more information).
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).
- **Question sorting -** [Multi Grid] This controls the display order of the questions (see Questions below). The items can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order (go to Randomization for more information).
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).

- **Column sorting –** [3D-Grid]. This controls the display order of the grid columns. The columns can be displayed:
  - **In order –** in the order that they appear in the list.
  - **Randomized –** in pseudo-random order (go to Randomization for more information).
  - **Rotated –** the list is shifted and rotated by one position for each new response.
  - **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.
  - **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).
- **Columns/Rows –** [Single, Multi, Open text, Numeric list]. Divides the answer list into several columns and/or rows. If you specify only the number of rows, the answers will be distributed evenly across the columns and vice versa. If both Columns and Rows are specified, Columns takes precedence. Note that answers in groups and auto-sum numeric lists are not currently supported.
- **Number of answers –** [Multi, Ranking]. You can force respondents to select a specific number of answers, define the minimum number of answers required, and define the maximum allowed number of answers.
  - **Equal to -** specifies the exact number of answer items to be selected by a respondent taking the interview. Here you must take into account the number of answer items available, especially when using masking.
  - **Min/Max count-** allows you to specify a minimum, maximum or range of answer items to be selected by a respondent taking the interview. Here you must take into account the number of answer items available, especially when using masking.
- **Resizable mode -** [Open, Open Text List - supports touch devices]. You can allow the text fields to be automatically or manually re-sized while the respondent is typing text if the amount of text typed is greater that the current area will allow. The options are:
  - **Off -** The box cannot be re-sized. In the event the respondent writes more text than can be displayed within the field, vertical scroll bars will be activated.
  - **Auto and manual -** in the event the respondent writes more text than can be displayed within the field, the height of the field will automatically be increased so the text can be viewed. In addition, grab-points are displayed so the respondent can re-size the field as desired. Vertical scroll bars will be activated if required.
  - **Auto -** in the event the respondent writes more text than can be displayed within the field, the height of the field will automatically be increased so the text can be viewed. Vertical scroll bars will not be activated.
  - **Manual -** the text field has re-size grab-points such that in the event the respondent writes more text than can be displayed within the field, he/she can adjust the height and width of the field manually so the text can be viewed. Vertical scroll bars will be activated if required.
- **Input box size -** [Open, Open text list, Numeric, Numeric list]. Set the number of rows you want the text box to have in the survey, and/or the width of the box in characters.
- **Input prefix -** [Numeric list]. Places prefix characters before the input field. This could for example be a **$** character if you are asking about prices in the USA.
- **Input suffix -** [Numeric list]. Places suffix characters after the input field. This could for example be **km** if you are asking about distances.
- **Input assistance -** [Numeric, Numeric list]. Check this box to place the thousand and decimal separators automatically when an answer is provided. The characters used will depend on the respondent's language standards. For example, if the question requires a numerical answer comprising 9 digits, 2 of which are decimals, it will be displayed as 1,234,567.89. Use the minus (-) character for negative numbers.
- **Total digits -** [Numeric, Numeric List]. Specifies the maximum total number of digits that can be stored, both to the left and to the right of the decimal point). Input an integer 0<p<=28.
- **Decimals -** [Numeric, Numeric List]. Specifies the maximum number of digits that can be stored to the right of the decimal point. Input an integer 0<=s<=p.
- **Upper / Lower limit** - [Numeric, Numeric List]. Define the scope of the entry. For “Lower limit”, there is a drop-down containing the choices “>” and “>=”. For “Upper limit”, there is a drop-down containing “<” and “<=”.

Note: For Numeric questions, the respondent can use either comma (,) or point (.) as the decimal separator according to his/her language standards. The respondent can also write a decimal number with a value less than 1 without the leading zero, for example ".35", and the negative sign (-) can be input as the first character; no other non-numeric characters will be accepted.

- **Recording length Min / Max -** set the minimum and maximum length of the recording, in seconds.
- **Edit in -** in the event you have selected more than one language for the survey then you can add a Title, Text and Instructions for each selected language. Select the language that you wish to edit.
- **Title -** [All question types] The title of the question. The title appears in the survey designer column, and it functions as the heading for the question on the survey page in a web survey. It also appears as a descriptive label for the question when used in Reportal. The length of the title can be maximum 255 characters, otherwise it will be truncated. When a title is not provided, any character string in the Text field will be used as a title.
- **Text -** [All question types] The question text.
- **Instructions -** [Not Image upload, Audio Upload, Video Upload, Geolocation] Here you can type in any descriptive instructions or comments you may wish to provide to the respondent.
- **Actions -** [Single (not table lookup or hierarchy), Multi, Grid, Numeric List, Ranking,] opens the Actions drop-down menu (see The Actions Properties on page 142 for more information).
- **Questions -** [Multi Grid] The questions you wish to ask the respondents. These can be sorted as you require (see Question sorting above).
- **Answers -** [Open text list, Single, Multi, Numeric list, Ranking, Multi Grid] A list of options from which the respondent can select the desired answers to the questions. Note that the Answers can have a number of settings (see The Answer List Columns on page 151 for more information).
- **Prompts -** [Grid, 3D-Grid] The various subjects in the question about which you want the respondent's opinions.
- **Scale -** [Grid] The answer options available for the respondent to choose from. Note that the scale will be the same for all prompts in the grid question

Note: The columns displayed in the Questions, Answers, Prompts and Scale lists depend on whether Advanced answer settings is selected (see Advanced Answer Settings on page 151 for more information). All the columns are described in the Answer List Columns section (see The Answer List Columns on page 151 for more information).

4.14.1.1. The Appearance Options

All questions except Open text list, Information and Date have an Appearance property. This allows you to select how the question is to be presented to the respondent. The Appearance options presented will be applicable to the question type, though many of the options are available for more than one question type. This section lists all the possible Appearance options; the question types to which the options apply are given for each option.

Click on the current Appearance and select the required option from the drop-down menu that appears.

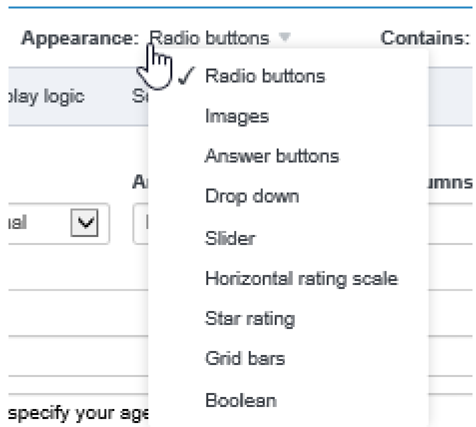


Figure 162 Accessing the Appearance options for a single question

The options are:

- **Text field -** [Open] you must set the number of rows of text you wish the respondent to have available in the field, and the width of the field in characters.
- **Paragraph -** [Open] this type provides a text box that is by default 10 rows high and 50 characters wide. You can change these values if you wish.
- **Essay -** [Open] this type provides a large text box that is by default 18 rows high and 50 characters wide. You can change these values if you wish.
- **Radio buttons -** [Single] the list of answer options is presented to the respondent in the form of a labeled list of radio buttons, only one of which can be activated at any time.
- **Check boxes -** [Multi] the answers are presented alongside check boxes, which the respondent checks to select.
- **Images -** [Single, Multi, Grid (if "Use Images in Answers" (see below) is not selected) 3D Grid] For single and multi questions this allows you to specify images to be used instead of the standard radio buttons or check boxes depending on the type of question. For grids it allows you to use images in place of the scale labels. Note that these images may also be defined globally from the **Survey Settings > Layout** page(go to Global button images for more information).
- **Answer buttons -** [Single, Multi, Grid, Multi Grid, 3D Grid] when “Answer buttons” is selected, respondents will be presented with a question interface where the answer options are clickable, labeled buttons instead of radio-buttons. This can be enabled for an entire survey by selecting “Answer Buttons” in Survey Settings. It can also be enabled (“On”) or disabled (“Off”) for specific questions through a question property. The property by default is set to “Inherit”, which means it will be controlled by the Survey Settings.
- **Searchable multi -** [Multi] in the event the answer list for a Multi question is very long, you can provide the respondents with the possibility to search the answer list so they can more easily find the answers they wish to use. When the Multi question is presented to the respondent, it will include a "Search" field above the answer list and a "Selected" field below.
- **Drop down -** [Single] the list of answer options is presented to the respondent in the form of a drop-down list from which the respondent can select one answer.
- **Slider -** [Single, Numeric, Numeric List, Grid - supports touch devices] This feature allows respondents to click and drag a slider bar to the answer alternative of choice, instead of selecting radio buttons. When you select this option, you can then customize the look of the slider in the Question Inputs control in the Question Skin (go to Question Skins for more information). Note that for Numeric and Numeric List questions, the Slider option only becomes available once Upper and Lower limits have been defined. Additional slider-related selections become available.

- **Horizontal rating scale -** [Single] when selected, the answers for the single question are displayed as a rating scale. If you wish to include "header" texts over the first and last answer options, add your desired text separated from the scale values by <space><hyphen><space>.
- **Star rating -** [Single] a star is displayed for each option instead of buttons (see Star Rating on page 138 for more information).
- **Grid bars** - [Single] displays the answer options in the form of bars (see Grid Bars on page 133 for more information).
- **Boolean -** [Single] select this option if you wish the system to store the data as 1-Bit (otherwise it is stored as 1-Byte (8-Bits)), thereby using 1/8 the amount of storage space.
- **Table lookup -** [Single] the answers are taken from table(s) set up in “Database Designer” (see Table Lookup Questions on page 143 for more information).
- **Hierarchy -** [Single] the answers are taken from table(s) set up in “Database Designer” (see Hierarchy Questions on page 143 for more information).
- **Numeric field -** [Numeric] an input field is presented into which the respondent must type the numerical answer value.
- **Numeric slider -** [Numeric] a slider is presented which the respondent must drag to the appropriate answer value.
- **Input fields -** [Numeric list, 3D Grid] each answer option has an input field into which the respondent types their answer.
- **Auto sum -** [Numeric list] each answer option has an input field into which the respondent types a numerical value. A running total of the values input so far is provided below the answer list.
- **Percent % (total) -** [Numeric list] each answer option has an input field into which the respondent types a percentage value. A running total of the values input so far is provided below the answer list. On completion, the total must be 100%.
- **Rank by click -** [Ranking] - the respondent clicks on the answer options in sequence to move them into the ranking table. The first item clicked will be placed at the top of the list.
- **Rank by numbers -** [Ranking] - the respondent ranks the answer options by typing numbers in sequence into the answer fields.
- **Rank by drag drop -** [Ranking] the respondent must drag each answer option from the list of answers and drop it into the desired location in the table.
- **Rating grid - Radio buttons** - [Grid] the scale options are presented as a grid of radio buttons; the respondent selects one option from each row in the grid.
- **Rating grid - Answer buttons** - [Grid] each scale option is presented as a separate button in the grid.
- **Rating grid - Drop down** - [Grid] each prompt has its own drop-down containing the scale; the respondent selects his/her answers from the drop-downs.
- **Rating grid - Images** - [Grid] the scale options are presented as a grid of images.
- **Rating list - Grid bars** - [Grid] displays the grid in the form of bars (see Grid Bars on page 133 for more information).
- **Rating list - Star rating** - [Grid] displays star shapes instead of a grid (see Star Rating on page 138 for more information).
- **Rating list - Slider** - [Grid] displays the grid in the form of sliders, one slider for each prompt - see above.
- **Rating list - Horizontal scale** - [Grid] presents the answer options as a horizontal rating scale (see Horizontal Scale on page 134 for more information).
- **Ranking grid - Card sort** - [Grid] presents the answer options as a card-sort layout (see Card Sort on page 136 for more information).
- **Ranking grid - Drop down** - [Grid] presents the answer options as a drop-down list.
- **Ranking grid - Radio buttons** - [Grid] presents the answer options as a set of radio buttons.

Note: Grid questions using the Ranking grid appearance must have the same number of prompts as there are scales in the grid.

- **Card sort -** [Grid] the answers to the question are presented as a deck of playing cards, with the scale being represented by a number of areas. The respondent answers the question by moving the cards into the appropriate area (see Card Sort on page 136 for more information).
- **Carousel -** [Grid] changes the answer layout from a tabular format to Carousel format (see Carousel on page 137 for more information).
- **Carousel - Star rating -** [Grid] is the carousel layout but using stars instead of numerical values on buttons for the scale presentation (see Star Rating on page 138 for more information).
- **Carousel - Grid bars -** [Grid] is the carousel layout but using the basic grid bar layout for the scale presentation.
- **Carousel - Images -** [Grid] is the carousel layout but using images to indicate the options.

For Grid questions, when Appearance is set to Rating list - Grid bars, Rating list - Horizontal Scale or Carousel - Grid bars, the “Exclude non-scored elements from scale” sub-option becomes available (see Exclude Non-Scored Elements From Scale on page 139 for more information).

4.14.1.2. Grid Bars

This option displays the scale values for grid questions, and the answer options for single questions, as a horizontal bars as shown below. Note that a single question will present one row of bars.

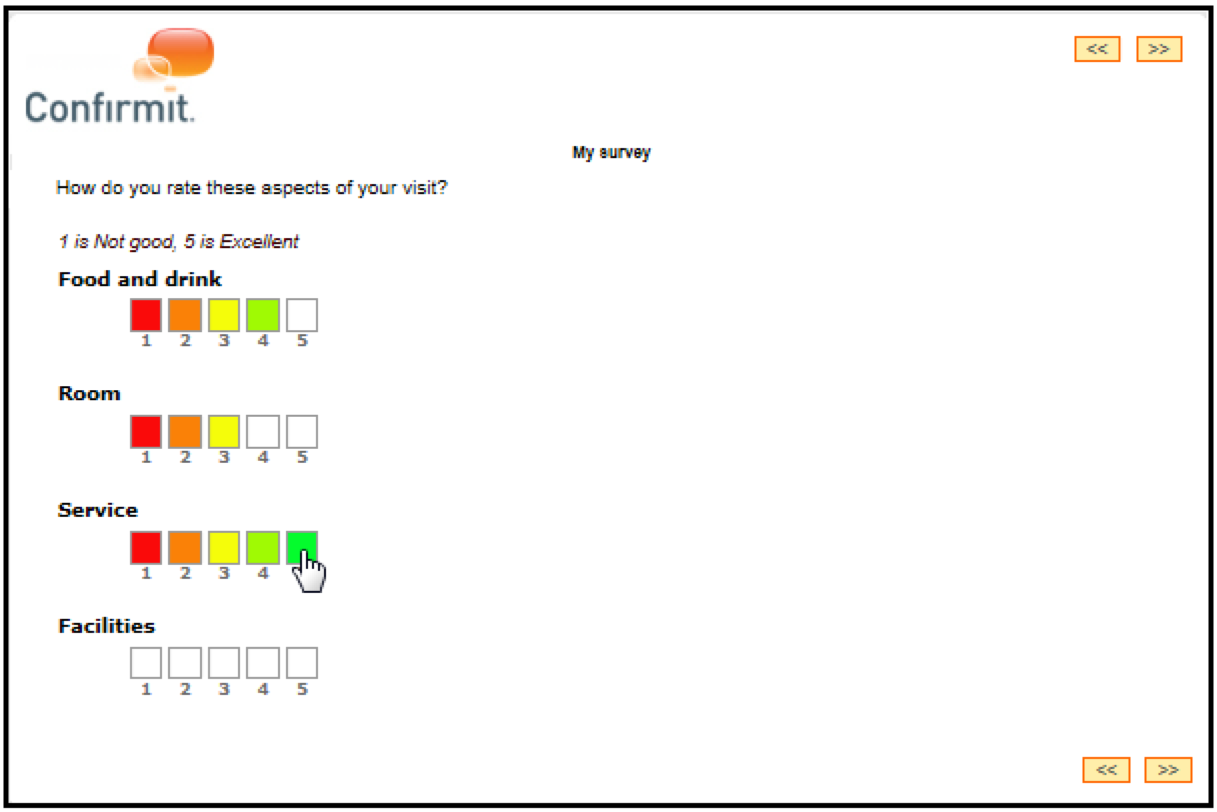


Figure 163 An example of a Grid question with the grid bars layout

One grid bar will be displayed for each answer value for a single question or each scale option for a grid.

For Grid questions, when the Rating list - Grid bars property is selected, the “Exclude non-scored elements from scale” option becomes available (see Exclude Non-Scored Elements From Scale on page 139 for more information).

For single questions, the answer value labels are presented for each grid bar.

Note: Due to space limitations, for mobile rendering a maximum of 11 boxes will be displayed. If more than 11 options are used in the grid, then when the question is displayed on a mobile unit it will default to normal mobile grid rendering.

4.14.1.3. Horizontal Scale

When this appearance is selected, the answers for the question are displayed as a rating scale.

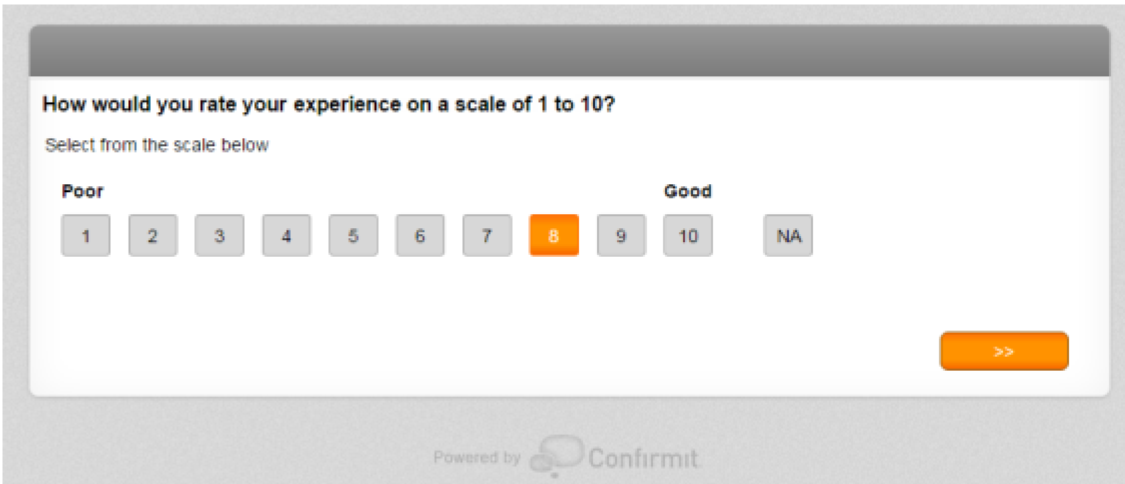


Figure 164 Example of a Single question using the Horizontal Scale option

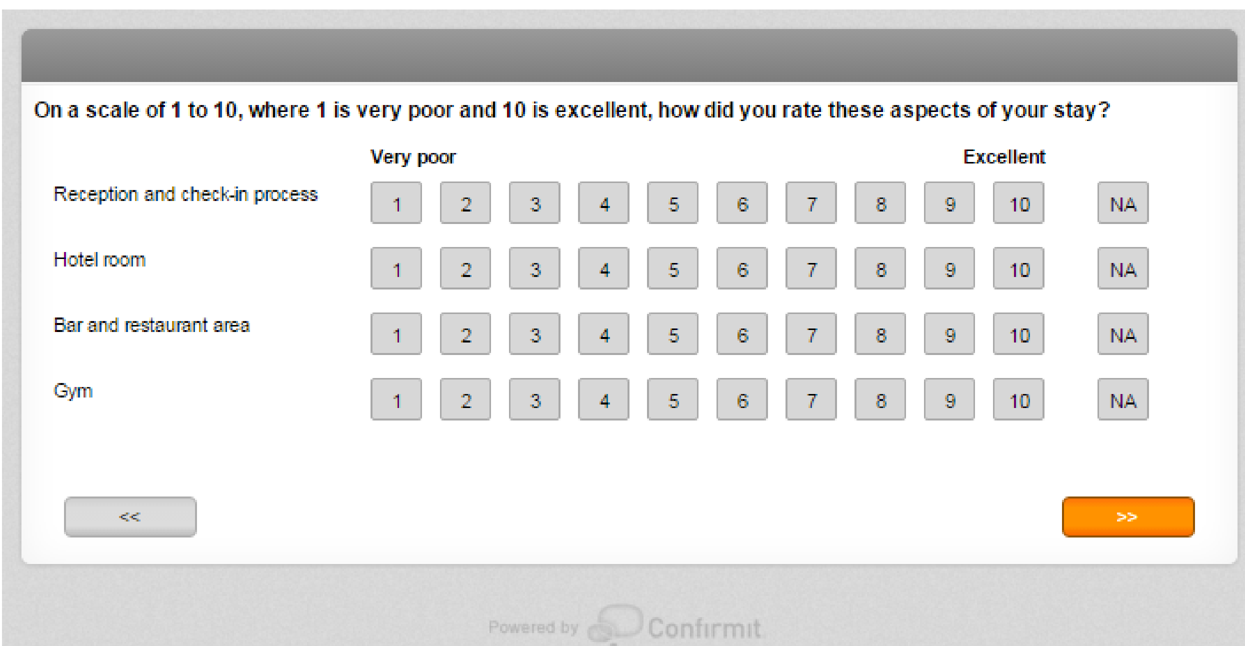


Figure 165 Example of a Grid question using the Horizontal Scale option

If you wish to include "header" texts over the first and last answer options, add your desired text separated from the scale values by <space><hyphen><space>. If for example you have the answers set up as shown below (note the "- Poor" and "- Good" texts for the 1 and 10 grades in the scale), then the layout will automatically be arranged as shown in the Single question example above. Note that header texts can only be added to the first and last scored answer options.

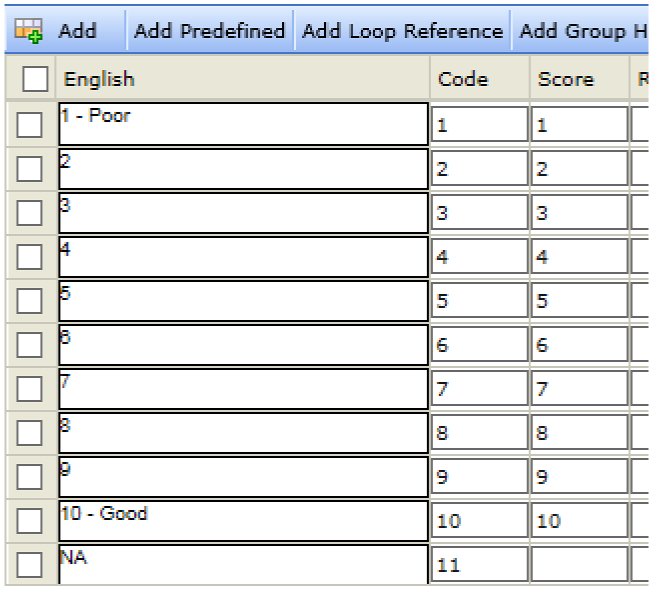


Figure 166 The question's Answers list

For Grid questions, when the Rating list - Horizontal scale property is selected, the “Exclude non-scored elements from scale” option becomes available (see Exclude Non-Scored Elements From Scale on page 139 for more information).

In desktop rendering, any answer options with undefined score values are displayed to the right of the answer list, whilst in mobile rendering any answer options with undefined score values are displayed below the answer bar as radio buttons.

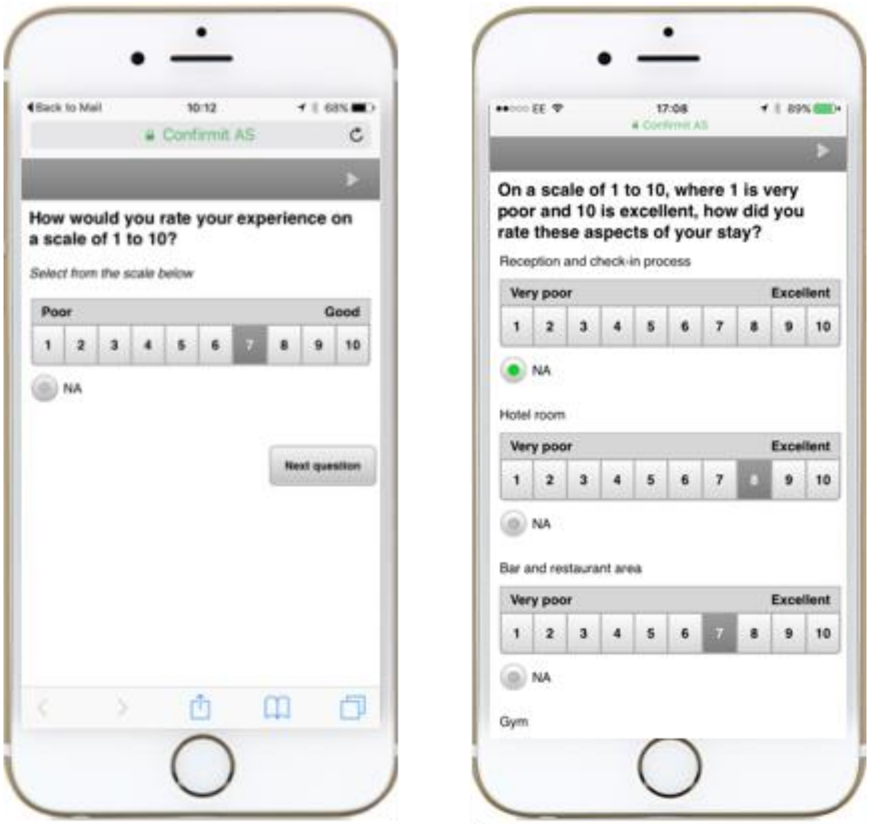


Figure 167 The same Single and Grid questions rendered on mobile

In mobile rendering, the space allocated to the answers is divided evenly between the options, so if there are fewer answer options then the answer buttons will be wider.

Note: If the question is to be presented in mobile rendering, then there can be a maximum of 11 answer options (for example, options 1 to 10, and N/A). In the event the question has more than 11 options, it will be rendered as a standard single question.

Note: Internet Explorer cannot render the iPhone/Android preview correctly. When previewing the questions in these modes you must therefore use either Chrome or Firefox.

4.14.1.4. Card Sort

This appearance presents the answers as a deck of playing cards, with the scale being represented by a series of areas. The respondent answers the question by dragging the cards into the appropriate areas.

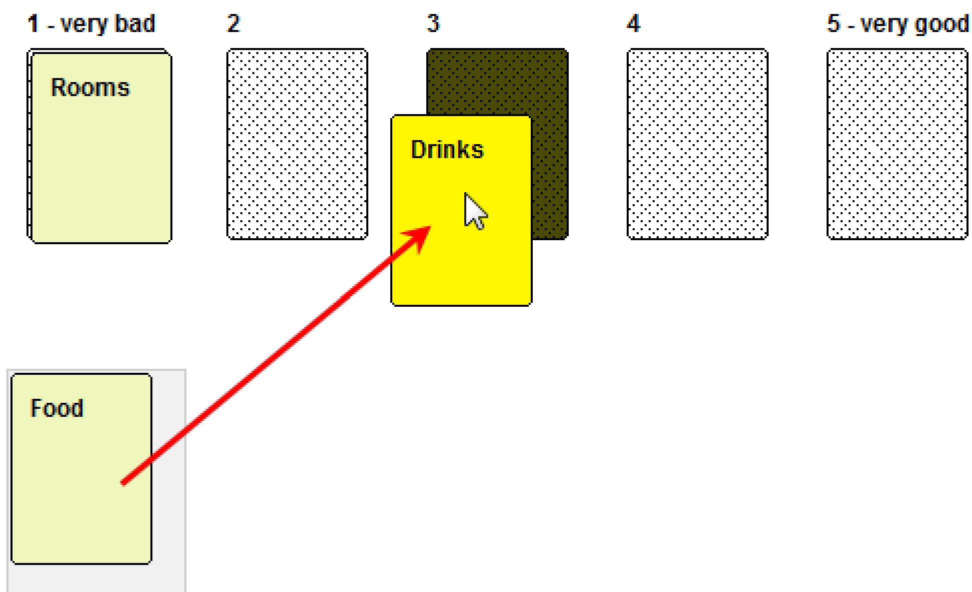


Figure 168 Dragging the question cards into the answer areas

The various styles for the cards and drop areas are set up in the **Question Skins > Grid Question > Question Form Input** properties pane. Additional card-sort-related selections also become available:

- **Card Offset -** sets an offset for the stack of "unused" cards. This shows the edges of unused cards lower in the pack so the respondent can see how many remain.
- **Card Dropped Offset -** sets an offset for the cards once they have been dropped onto the "answer" areas so the respondent can see how many he/she has dropped onto a particular answer.
- **Card Layout -** specifies where the card deck is located relative to the answer areas. For example, Top-Bottom places the deck at the top of the page and the answer areas at the bottom.

4.14.1.5. Carousel

Setting the Appearance property to Carousel changes the layout of the grid question to that shown below. Note that if Carousel is selected, several of the other options that are normally available to grids will be hidden.

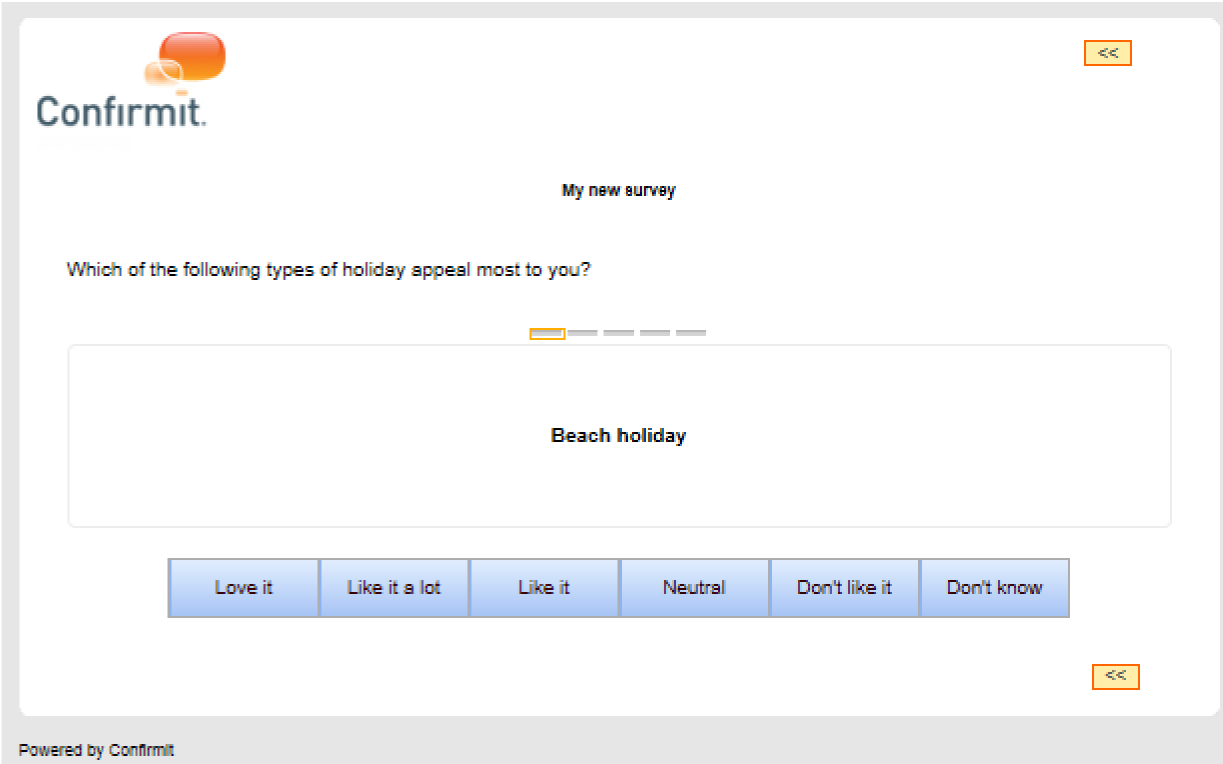


Figure 169 An example of a Grid question with the Carousel layout

The Carousel setting results in each grid statement being split into a separate view. The question text appears towards the top of the page, the first answer is presented, and the scale is presented below. The respondent selects their desired answer from the scale, and the next answer is then presented. A progress bar indicating the respondent's progress through this grid question is displayed below the question text. The survey's **Next** navigation button is displayed when the Carousel is completed.

The Carousel layout has several options; Star rating, Grid bars or Images can be used to vary the layout.

4.14.1.6. Star Rating

For grid questions, the Rating List and Carousel Appearance properties have the Star rating variation. This displays stars instead of the boxes as shown in the example below. Single questions also have the Start rating appearance.

Figure 170 Example of using Start Rating

One star will be displayed for each answer option in the grid or single question. Note that for a grid you can include guide texts for the first and last answer options.

Note: Due to space limitations, for mobile rendering a maximum of 11 stars will be displayed. If more than 11 options are used in the grid, then when the question is displayed on a mobile unit it will default to normal mobile grid rendering.

4.14.1.7. Exclude Non-Scored Elements From Scale

For Grid questions, when Appearance is set to Rating list - Grid bars, Rating list - Horizontal Scale or Carousel - Grid bars, the “Exclude non-scored elements from scale” sub-option becomes available. Select this option to remove any answer options that do not have a score (see The Answer List Columns on page 151 for more information) from the list of answers available, and places them separately. This allows you to include for example a “Not applicable” option in the answer list, and as it does not have a score it will not affect your results.

4.14.2. The Properties Sheet

Each question has properties and options appropriate to the type of question that allow you to set up the question such that it looks and functions as you wish. To view and edit a question’s properties, click on the question in the survey to open the question details page. A number of the most-used properties are provided on this page, whilst the remainder are listed on a separate Properties sheet accessible via the **Properties** icon  in the question details page toolbar.

Note that the properties are not duplicated; they will be located either on the question details page, or on the properties sheet - not both. The properties in the property sheet are updated dynamically, that is they are displayed or hidden depending on the active question type and on whether other selected properties or options make them relevant/irrelevant. For example, the Exclude Translator property only appears if more than one language has been selected for the survey.

As many of the properties on the Properties sheet are identical for the various question types, all the properties available for all the question types are listed and described here. The question types to which each property applies are noted in the property description.

- **Question skin** - [All] allows you to select a different question skin for the particular question. If no skin is specified here, then the default skin for the survey will be used.
- **Number of columns -** [Single, Multi, Ranking, Lists] Divides the answer list into several columns. If you specify only the number of columns, the appropriate number of rows will be created and the answers will be distributed evenly amongst them.
- **Number of rows -** [Single, Multi, Ranking, Lists] Divides the answer list into several rows. If you specify only the number of rows, the appropriate number of columns will be created and the answers will be distributed evenly across them.
- **Other box columns –** [Single, Multi, Grid, Multi Grid, Ranking, Lists] defines the number of columns for the 'Other' input box.
- **Other box rows –** [Single, Multi, Grid, Multi Grid, Ranking, Lists] defines the number of rows for the 'Other' input box. This only takes effect if set to larger than 1. Note that when using styles, the vertical alignment of the other-input determines the vertical alignment of the associated label.
- **Answer column width -** [Grid, Multi Grid, Lists] defines a width, in specified units, of the answer column in grid and list questions. This allows you to align the answer options in the event HTML tables are not being used due to the Accessibility functionality.
- **Group display –** [Single, Multi, Grid, Ranking, Lists] when the answers are put into groups, for example when Group Headers have been used, this property controls the display order of the groups. The groups can be displayed:
  - **In order –** in the order that they appear in the grid.
  - **Randomized –** in pseudo-random order.
  - **Rotated –** the order is shifted and rotated by one position for each new response.
  - **Flipped -** the order will alternate between displaying the columns left-to-right and right-to-left for different respondents.
  - **Alphabetically sorted -** will sort the columns alphabetically based on the labels (in the current language).
- **Button images –** [Single, Multi, Grid if "Use Images in Answers" (see below) is not selected] allows you to specify images to be used instead of the standard radio buttons or check boxes. Note that the type of question you have created, for example Single or Multi, specifies whether the images will replace radio buttons or check boxes. Note also that these images may be defined globally from the **Options > Layout** page. See Global Button Images in the Layout area section for further information.For the Button images field, three options are available:
  - **Global Images –** the default value. The image URLs that are specified on the **Options > Layout** page will be used (see above).
  - **No Images –** this setting overrides the setting from the **Options > Layout** page. Regular radio buttons and check boxes will now be used for this question irrespective of the settings in Global button images (see above).
  - **Custom Images –** this setting overrides the setting from the **Survey Settings > Layout** page, and allows you to specify image URLs for this specific question. When you select this option, additional input fields become available to enable you to input the URLs to the desired images (see below).
- **Auto check other -** the Other - specify answer will be selected automatically if the respondent starts to add text to the text box.
- **Vertical scroll bar -** [Grid, Multi Grid] shows a vertical scroll bar so the respondent can access all of a long grid question.
  - **Off -** no scroll bar is displayed.
  - **Automated** - a scroll bar is displayed when required.
  - **Fixed -** a scroll bar is always displayed whether or not it is actually required.
- **Horizontal scroll bar -** [Grid, Multi Grid] shows a horizontal scroll bar so the respondent can access all of a wide grid question.
  - **Off -** no scroll bar is displayed.

  - **Automated** - a scroll bar is displayed when required.
  - **Fixed -** a scroll bar is always displayed whether or not it is actually required.

- **Repeat headers -** [Grid, Multi Grid] when selected, the headers will be repeated every specified number of rows (a field appears allowing you to input the interval).
- **Bottom headers -** [Grid, Multi Grid] when selected, the headers are repeated at the bottom of the grid.
- **Left and right text -** [Grid, reusable lists] allows you to include texts to the right of the answer fields in addition to the usual location on the left.
- **Show scale bars -** [Grid] when selected, a box is placed above each scale column. For example, in a "Please indicate on a scale of 1 to 10…." question, you can add a small bar to the "1" column, a slightly larger bar to the "2" column, a slightly larger bar to the "3" column etc. to give a ramp effect.
- **Read only –** [Not Info] used to display questions to respondents as read only. This would normally be used to display pre-selected answers set by a script (see the Confirmit Scripting Manual). For example, a respondent goes to the next page of the survey where a single question is displayed. This question has one of the answers already selected, and the respondent is not allowed to modify the answer. Select this property if respondents should not be allowed to modify the pre-selected/preset answers.
- **Indexed –** [Single, Numeric, Date] if selected, an index will be created on this field in the database next time you generate the database (see Indexes on page 142 for more information).
- **Password -** [Open, Numeric] enables you to collect data where the respondent's input is hidden from his/her view while they are typing, in the same way as when entering a password.
- **Exclude from translator -** [All, only if more than one language is selected for the survey] allows you to exclude specific questions from the translator interface. This gives you the possibility to hide nodes that are used for internal programming purposes from the translators in Confirmit Translator.
- **Exclude from reporting -** [All] check if you wish to prevent this question and its data from being used in reports created from this survey. Note that this also includes Instant Analytics reports (see Instant Analytics on page 229 for more information).
- **Clean on question masking -** [All] If the question is masked and the respondents go back and modify answers earlier in the survey, answers to this question must be re-entered.
- **Question Category** - [Not Info] you can define categories for the question. A Reportal user can then filter on the question categories when using hit lists in single view in Reportal. Refer to the Reportal User Guide for further details. Type the category name (or names) into the field. Multiple categories can be entered in the field; separate the names using the semi-colon character, for example Food;Drink.

Note: You are advised to use a maximum of 164 characters for the individual category names. Survey Designer will allow you to exceed this limit, but single file exports and export templates will then not function.

Note: The number of categories that can be viewed in the translator interface is limited to 1300.

- **Character limit -** specifies the number of characters assigned to responses to this question in the database and when reporting.
- **Open text coding –** [Single, Multi, Ranking] Here you specify the Question ID of the Open-Text question that will be coded in the Multi question.
- **Do not perform data cleaning –** [Condition node] you may wish to allow the respondents to modify their answers. If a respondent takes advantage of this and moves back and forth in the questionnaire changing his/her answers, then answers already given later in the survey may not be consistent with the changed answers. To ensure consistency in the data, if a condition evaluates to FALSE, any answers previously given to all questions inside the THEN folder are deleted. (If the condition evaluates to TRUE and has an ELSE folder, all the answers to the questions inside the ELSE folder are deleted.) However sometimes you may not want to delete the previously entered data. This could for example be in a questionnaire where the respondent is allowed to re-enter, but will only be given access to some of the questions or a set of questions different from the first time. Check this property to prevent deletion of the answers inside a THEN or ELSE folder for this condition. A check will be run to discover whether this is the first or subsequent time the user accesses the survey.

4.14.2.1. Indexes

Indexes in databases are similar to indexes in books. In a book, an index allows you to find information quickly without reading the entire book. In a database, an index allows the database program to find data in a table without scanning the entire table.

Indexes improve performance in areas such as:

- Aggregated and verbatim reporting when filtering on fields with indexes.
- Searching in individual reporting and in survey data editing (when search fields are indexed).
- Data imports where the key field is indexed.

Note: Indexes should be used only when needed since responses take longer to store the more indexes there are. This can lead to slightly poorer performance in interviewing. Also, the database will be unavailable for other processes the first time it is regenerated after the index property is set. We therefore recommend against setting new indexes and regenerating the survey while respondents are answering the survey. Note also however that some functionality in Reportal, for example Hitlists and hierarchies, require the question to be indexed.

4.14.3. The Actions Properties

Single, Multi, Grid, Numeric list, Open text list, Ranking, Multi choice grid and 3D grid questions have a number of Actions properties that allow you to set up the answer, scale and prompt lists. The properties available for a question depend on the question type.

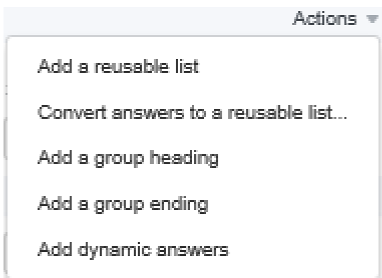


Figure 171 The Actions drop-down menu

The properties are:

- **Add a reusable list -** adds a row to the answer list below the current row and places a field in the Answer values column. If you have only one reusable list available, that list is automatically added to the column. If you have more than one available then the field will be a selection box and you can select the list you want to use from the drop-down (see How to Create a Reusable List on page 155 for more information).
- **Convert answers to a reusable list -** converts the entire answer list into a reusable list and saves the list in the Reusable lists column. You can then use the same answer list as often as you need to (see How to Convert an Answer List to a Reusable List on page 158 for more information).
- **Add a group heading -** creates a row within the answer list below the current row and inserts a header field for the group. The group starts at this row, and will contain all the items in the answer list until a either a group ending or a new group heading is added. Type the desired group header text into the field.
- **Add a group ending -** places a ‘group end’ code in the answer list below the current row. Any answers added to the list below this code will not be included in the previous group.
- **Add dynamic answers -** enables you to quickly and easily mask question answer lists based on previously asked questions (see Dynamic Answers on page 153 for more information).

When the answer list contains group headings, the Answer list sorting property controls the order in which the items inside each group are displayed. If the list does not contain any group heading items, then the Answer list sorting property controls the order of all the items in the list. If you have several groups in the answer list, then the order of the groups is controlled by the Group display order.

4.14.4. Table Lookup Questions

The Table Lookup Appearance option is only available for Table lookup / Hierarchy questions.

If in the Appearance field you select Table lookup, the Answers area will then present a field to enable you to select a database schema. Once you have selected a schema, a new field will appear to enable you to select one of the tables in that schema.

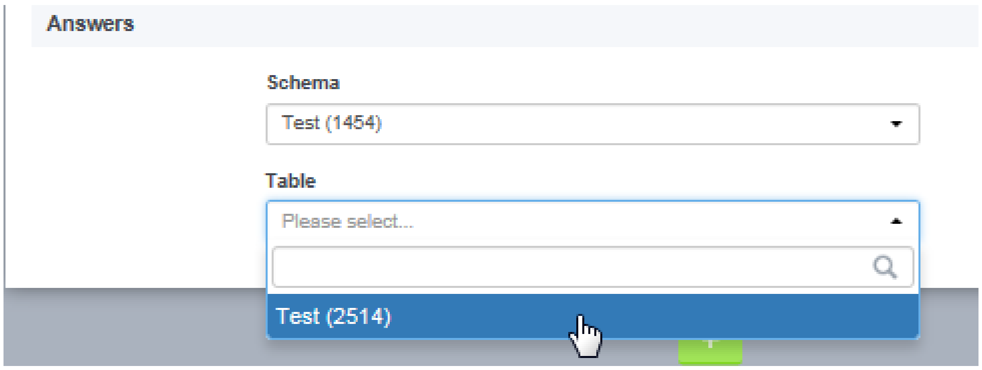


Figure 172 Example of the Table Lookup fields

The question will then be presented to the respondent as an ordinary single question according to your settings in the Question Details page and the Properties sheet, and will retrieve the answer list dynamically from the table in your database schema. The answers will be listed in the same order as in the table in the database schema.

If the list of schemas and/or hierarchies is extensive you can search for the required item(s). Start typing a character string into the field and the list will be filtered such that it only shows those items that include the character string somewhere in the name.

4.14.5. Hierarchy Questions

The Hierarchy appearance option is only available for Table lookup / Hierarchy questions.

If in the Appearance field you select Hierarchy, the Answers area will then present a field to enable you to select a database schema. Once you have selected a schema, a new field will appear to enable you to select one of the tables in that schema.

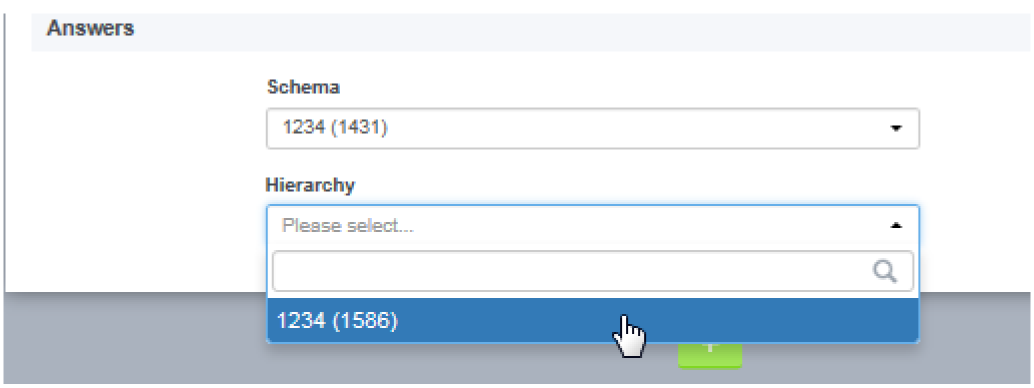


Figure 173 Example of the Hierarchy fields

If the list of schemas and/or hierarchies is extensive you can search for the required item(s). Start typing a character string into the field and the list will be filtered such that it only shows those items that include the character string somewhere in the name.

4.15. Answers, Prompts and Scales

A list of answer options from which the respondent can select their desired answer to the question is required for all question types except Info, Date, Numeric and Open questions. You can add the answer options individually (see How to Add Answers to a Question on page 145 for more information), copy-paste them from other applications (see How to Paste a List on page 146 for more information), create a reusable list (see How to Create a Reusable List on page 155 for more information), and copy columns out from the answer list for use elsewhere (see below).

Figure 174 Example of the Answer fields for a Single question

- Click the **Copy Column** icon for a column to copy the data in that column to your clipboard so you can use it elsewhere.
- Click the **Copy all columns** button (located beside Answers in the title bar) to copy all copyable columns (text, code and score) to the clipboard. This may be useful when you are maintaining long lists or you simply want to work on the list in another editor (for example Excel). Each row in the answer list is placed in a separate row in the clipboard, with the column items separated by tabs.

Grid questions have a list of Prompts, which are the various subjects in the question that you want the respondent's opinions on, and a Scale, which are the answer options available for the respondent to choose from. Note that the scale will be the same for all prompts in the grid question (in this example, the Appearance is set to Rating list - Slider).

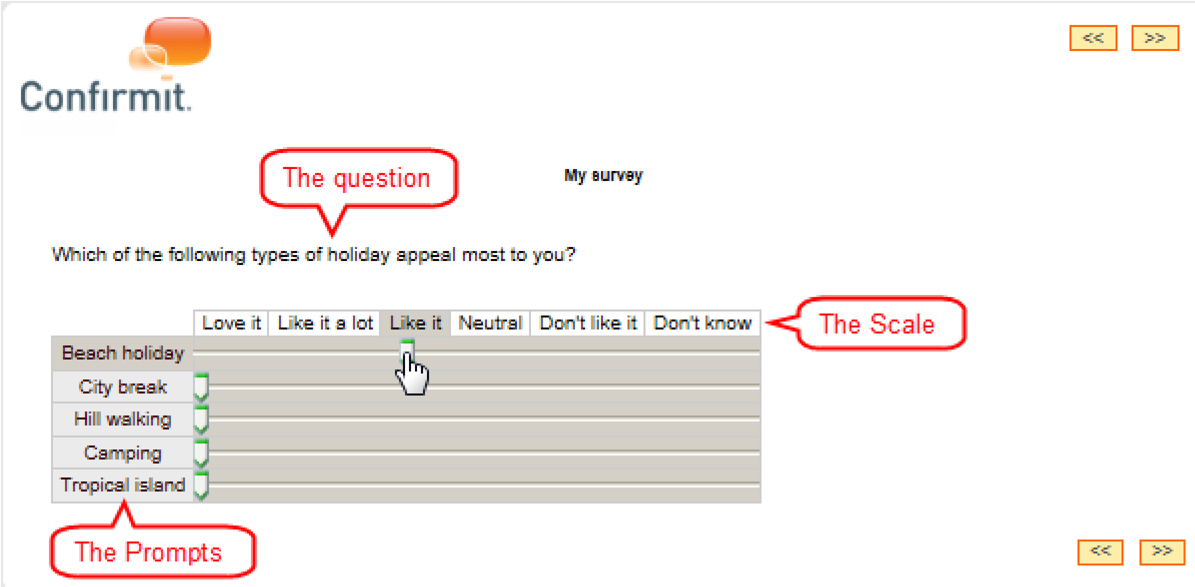


Figure 175 Example of the prompts and the scale for a grid question

For all lists, the columns displayed on-screen will depend on whether or not you have selected Advanced answer settings in the item Editor tool (see Advanced Answer Settings on page 151 for more information).

4.15.1. How to Add Answers to a Question

Answer, Prompt and Scale items are all added to the question in the same way, and you add them in the area towards the bottom of the question details page. Note that the columns presented depend on the question type and on whether you have selected to display the Advanced answer settings (see The Answer List Columns on page 151 for more information).

You can add the answer, prompt and scale items individually, you can add a reusable list (see Reusable Lists on page 155 for more information), or you can add a number of items simultaneously by writing or pasting in a list that you have created earlier (see How to Paste a List on page 146 for more information). To add a single item:

1. Click **Add one**.

   A row is added to the list.

2. Type the answer/prompt/scale (the text you wish to present to the respondent) into the field.

Note: Press the Enter key on your keyboard to add a carriage return inside the answer item, allowing multi-line list items.

3. Type in or select the remaining properties as required for that item. Note that the properties you set for an item apply only to that particular item.

If you already have some answers in the list and you want to add more, place the cursor into a field and press the down-arrow key on your keyboard. The cursor will move down to the next row in the list. If the cursor is in the bottom row and you press the down-arrow key, a new row will be added to the bottom of the list and the cursor will move to the ...Values field in the left column.

Note: For all questions where radio buttons or check boxes are normally used, such as single, multi and grid questions, you can replace the normal answer option format of button/box and text with images.

In the event the answer list for a Multi question is very long, you can provide the respondents with the possibility to search the answer list so they can more easily find the answers they wish to use. To do this, go to the Multi question's **Appearance** property and select the **Searchable multi** option (see Question Properties on page 127 for more information).

4.15.2. How to Paste a List

If your answer, loop, prompt or scale list is going to be extensive, instead of adding each item individually it may well be quicker to create the list in another application then copy and paste the complete list into the question. This can be done for all answer, prompt and scale lists.

1. In the question, click **Add many...**.

   The Paste a list overlay opens.

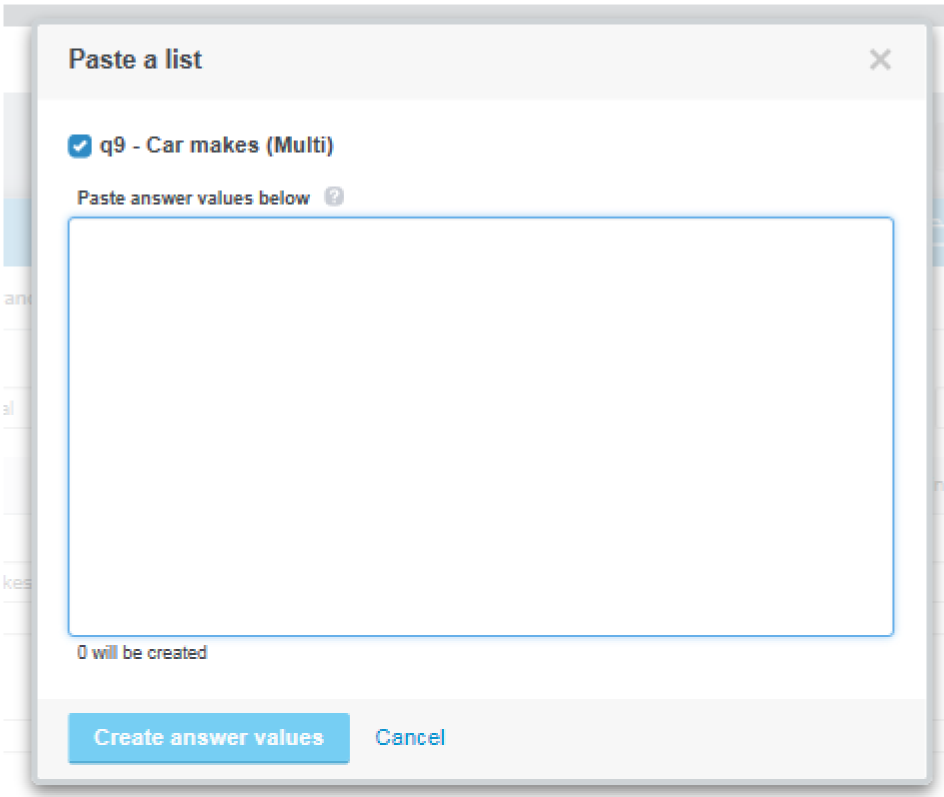


Figure 176 The Paste a list overlay

2. If you have created your list in a separate application copy the list and paste it into the text field, or write the answers into the text field using **Return** to separate the answers.

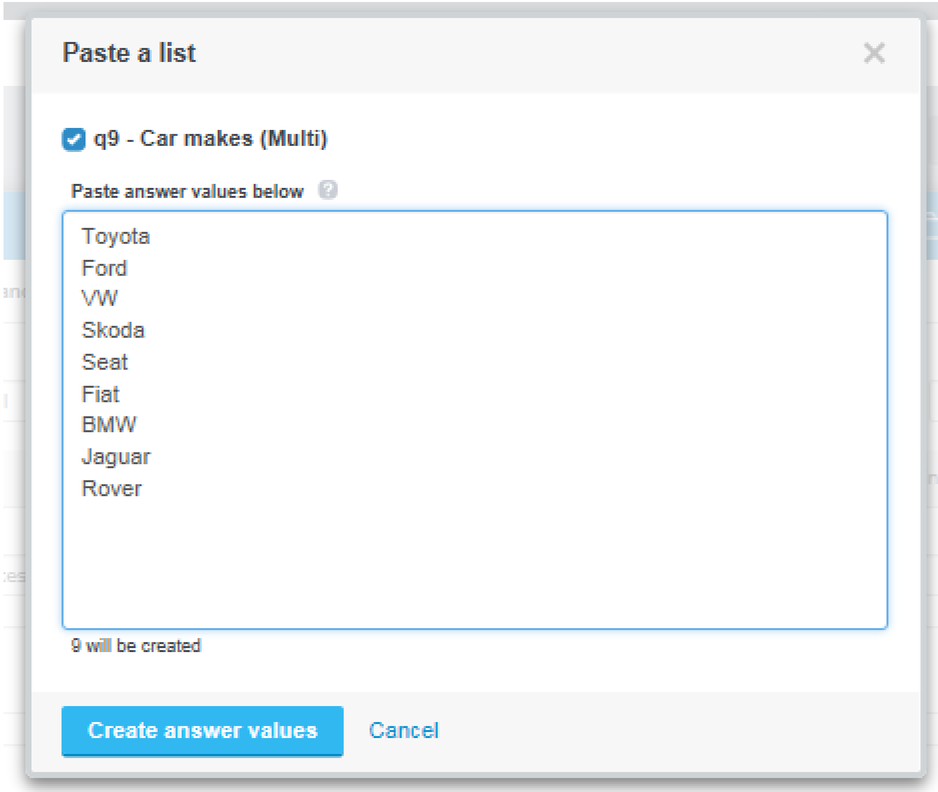


Figure 177 Copying the pre-recorded list into the overlay

Note that the total number of answers that will be created is given below the text field.

3. When your list is complete, click **Create answer values** (the appropriate list will be specified).

   The list is created in the question details overlay.

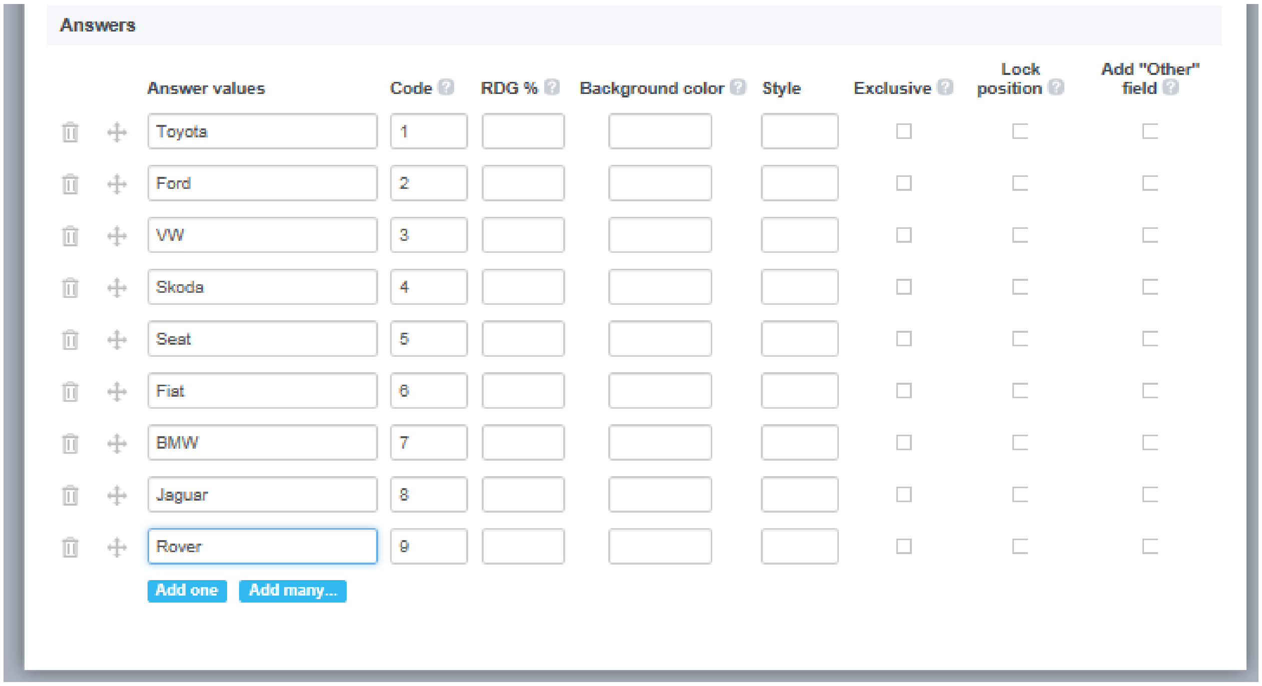


Figure 178 The completed answer list in the question

You can rearrange the items in the list if required, using the drag-and-drop button (see Moving Answers on page 153 for more information).

If you wish to add items to an existing list using the Paste list functionality, note that the existing list will not be overwritten; any “new” items will be added to the bottom of the existing list.

4.15.3. Bulk Pasting of List Items

You can paste answer lists or scales in any language, and corresponding code and score values as necessary, directly into the question by copying and pasting into the text field.

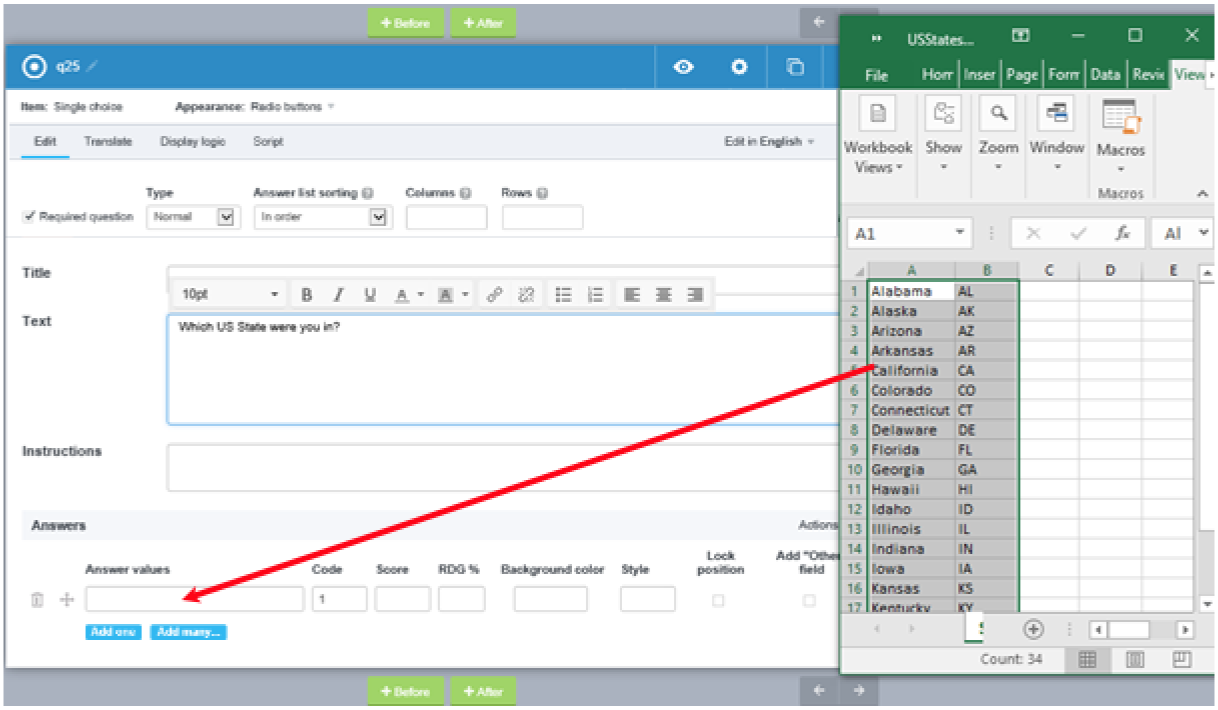


Figure 179 Bulk-pasting of answer lists and codes

Existing values can be overwritten or kept. If you wish to overwrite existing values and your copied block of values is larger than the existing list then additional rows will be added to the list as necessary. If your copied block of values is smaller than the existing list then only the appropriate number of rows will be overwritten; any additional existing rows will be kept.

Texts, codes and scores can be pasted simultaneously, or the operation can be performed on a column-by-column basis. This method is particularly useful for multilingual lists where you need the ability to paste in additional language texts to a previously created list without disturbing the existing codes.

If you wish to paste multiple columns simultaneously, for example answers and corresponding codes, then in the **Item Editor** menu select **Advanced answer settings** to show the additional columns (see Advanced Answer Settings on page 151 for more information). If **Advanced answer settings** is not selected then only the first column of the selected data will be pasted into the list irrespective of how many columns you select (to reduce the risk of mistakes, deselect **Advanced answer settings** when pasting additional language texts into an existing list).

- If the list exists and you wish to add to the current values, or if the list is currently empty, click **Add one** to add a new row at the required location. Note that a code for that row is added automatically, so when you paste into the list you will be asked if you wish to replace the existing values.
- If the list exists and you wish to overwrite the current values, click into the first row of the list that you wish to overwrite and paste in the new values. The selected row and subsequent rows as necessary will be overwritten; any additional rows from the existing list that are not overwritten will be kept.

1. In the application from which you wish to copy the list (for example Excel), select and copy the desired column(s) of values.
2. Click into the row in which you wish to add the first row of the copied text (click **Add one** as necessary), and paste the text into the list.
3. Confirm that you wish to replace the existing values.

   The selected values are copied into the list. New rows are added to the list automatically as required such that each value is a placed in a separate row. If you have included Codes and Scores in your copy/paste operation then if Advanced answer settings is set these will be added to the appropriate columns.

The values you are pasting can include group heading texts, and when pasting to a list containing group heading field the heading texts will be set accordingly. Use the **Add one** button and the options in the **Actions** menu to build the rows in the list in the required order. Then when you paste the values into the list, the group heading texts will be pasted into the appropriate rows.

If the list you are pasting into already includes a reusable list, then this will be ignored when you paste in the values; the values will be pasted in above and below the reusable list as appropriate depending on the number of items in the list.

4.15.4. Hint Texts

You can place "hint" texts at the first and last locations in answer lists, and at the ends of the prompt and scale rows for Grid questions. You can use these for example instead of writing instructions, to indicate the "direction of flow" for the answers or options. Note that for Grid questions the hint texts look best when the Appearance property is set to Grid Bars, Star rating or Horizontal Scale; the texts can be used in other appearances but may not look so good. For other questions types, usage should be assessed on a question-by-question basis.

To include hint texts, add your desired text separated from the scale values by <space><hyphen><space>. If for example you have the Scale set up as shown below (note the "- Bad" and "- Good" texts for the 1 and 5 grades in the scale):

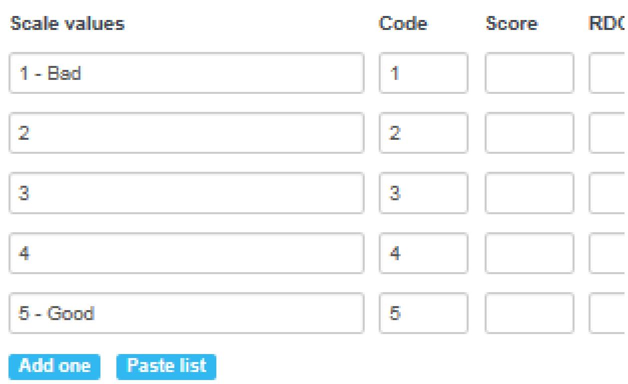


Figure 180 Scale setup

Then the layout will automatically be arranged as shown below, with the texts placed at the ends of the rows of selection boxes.

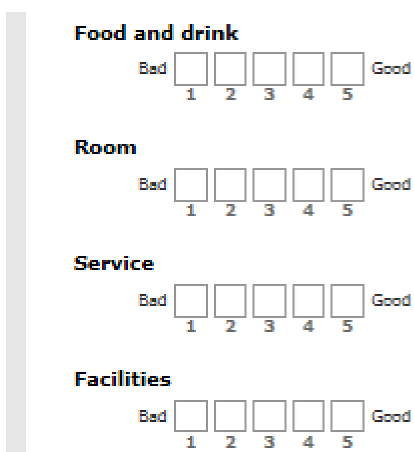


Figure 181 Resulting layout for a grid bar appearance

Note: Hint texts can only be added to the first and last scale values that have codes. A "Don't know" answer option would need to be located outside the row of "value" answer options, so would be placed after the hint text. It will then interfere with the hint text, and this will not look good - see below. Confirmit therefore recommends you do not attempt to use hint texts for questions that need "Don't know" values.

Figure 182 Attempting to combine hint texts and Don't know answer options

4.15.5. Advanced Answer Settings

The toolbar in the Design page holds the **Item Editor** tool. This allows you to toggle on and off the advanced answer settings for the survey questions.

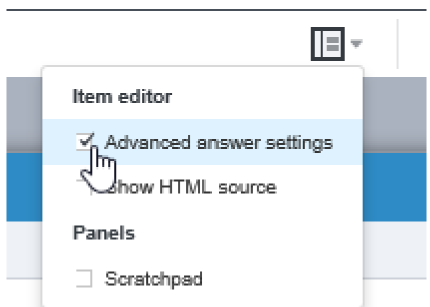


Figure 183 Activating the advanced answer settings

Check the Advanced answer settings box to show a number of additional columns for the Answers, Prompts, Scale and Question lists. The columns that are displayed will depend on the question type, and allow you to set additional properties and values. All the columns are described in the Answer List Columns section (see The Answer List Columns on page 151 for more information).

4.15.6. The Answer List Columns

A question's answer list consists of one row for each answer or category. Each row can contain the following columns depending on the question type and on whether you have selected to display the Advanced answer settings (see Advanced Answer Settings on page 151 for more information):

- **Code –** this is a code given to the particular answer option, which enables Confirmit to find and process the answers (see Codes on page 159 for more information). Each code MUST be unique for a question, and each "Question ID and Code" combination MUST be unique for the questionnaire.
- **Score –** A numeric value for the answer. Use this field to define the individual value/score of each category. You must define values/scores to be able to calculate averages for the question in Rapid Results and Reportal. The average will only be calculated from answers with assigned values/scores. If for example you have "Don't know" as a possible answer, but want the averages to be calculated only from the other answers, you could leave the value/score of "Do not know" blank. The values/scores can be defined at any stage of the survey. Note that you will have to recompile the survey if you define values in an ongoing or closed survey.
- **RDG % –** When you use the Random Data Generator to test your survey (refer to the Authoring User Guide for further details) and the survey includes a screening question, use this column to specify a percentage of respondents you want to be screened. This will prevent the system from inserting too many or too few respondents in this group when generating test data. The RDG % numbers must be integers from 0 to 100. You do not have to specify values for all the items in the answer list. Any items without specified values will be given a value according to the remaining percentage, evenly distributed. Note that the RDG% column is only available when you have the RDG add-on enabled. Contact your system administrator for further details.

- **RDG% Single -** [3D Grid] when you use the Random Data Generator (go to The Random Data Generator for more information) to test your survey and the survey includes a Single question used for screening, use this column to specify a percentage of respondents you want to be screened. This will prevent the system from inserting too many or too few respondents in this group when generating test data. The RDG % numbers must be integers from 0 to 100. You do not have to specify values for all the items in the answer list. Any items without specified values will be given a value according to the remaining percentage, evenly distributed. Note that the RDG% column is only available when you have the RDG add-on enabled. Contact your system administrator for further details.
- **RDG% Multi -** [3D Grid] when you use the Random Data Generator (go to The Random Data Generator for more information) to test your survey and the survey includes a Multi question used for screening, use this column to specify a percentage of respondents you want to be screened. This will prevent the system from inserting too many or too few respondents in this group when generating test data. The RDG % numbers must be integers from 0 to 100. You do not have to specify values for all the items in the answer list. Any items without specified values will be given a value according to the remaining percentage, evenly distributed. Note that the RDG% column is only available when you have the RDG add-on enabled. Contact your system administrator for further details.
- **Column width -** [Grid] Defines a width, in specified units, of the answer column in grid questions. This allows you to align the answer options in the event HTML tables are not being used due to the Accessibility functionality.
- **Background color –** This property makes it possible to have color variations inside a grid, and answer lists in Single and Multi questions.
- **Style -** select an HTML style for the answer option. The drop-down list contains all the styles available in the **Themes and Skins > HTML Styles** folder.
- **Exclusive –** [Open text list, Multi, Numeric list, Rank, Multi Grid]. Defines one or more elements in a multi-select list as single (for example “None of the above”). If an answer defined as Exclusive is selected, then no other answers can be selected.
- **Lock Position –** check this box if you want a question keep its position when randomizing or rotating a list (for example “*none of the above*” will normally always be last in a list).
- **Add “Other” field –** check this box if you want an open-ended text box after the answer alternative.

4.15.7. Answer List Sorting

Single, Multi, Grid, Multi Grid, 3D Grid, Ranking, and List questions have the Answer List Sorting property towards the top of the question details overlay. The options in this drop-down list control the display order of the answer list (all the specified question types) and scale (Grid only).

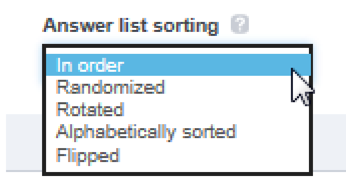


Figure 184 The Answer list sorting drop-down options

The items can be displayed:

- **In order –** in the order that they appear in the list. Note that you can adjust the order of the items in the list (see Moving Answers on page 153 for more information).
- **Randomized –** in pseudo-random order. The order will be different every time the question is accessed, to avoid bias.
- **Rotated –** the list is shifted and rotated by one position for each new response, again to avoid bias.
- **Alphabetically sorted -** will sort the list alphabetically based on the labels (in the current language).

- **Flipped -** will alternate between displaying the list top-bottom or bottom-top for different respondents.

If the list does not contain any Group heading items, then Answer list sorting controls the order of all the items in the list. When the answer list contains Group headings, Answer list sorting controls the order in which the items inside each group are displayed; the order of the groups is controlled by the Group display order.

4.15.8. Moving Answers

Once you have created your list of answers for a question, you can change the order in which they are presented to the respondent. If you want to have the answers presented in for example alphabetical order, or randomly, you can select one of the options in the Answer List Sorting drop-down (see Answer List Sorting on page 152 for more information). If you wish to display the answers in a specific order, then you can select In Order from the drop-down, then build the list in the desired order.

However you may need to add items to the list, or change the display order. In this case you can then drag and drop the answers to the desired location in the list. Click on the Move Item icon for the answer and drag it to the desired location in the list. The location where it will be placed when dropped is indicated by a blue dotted line.

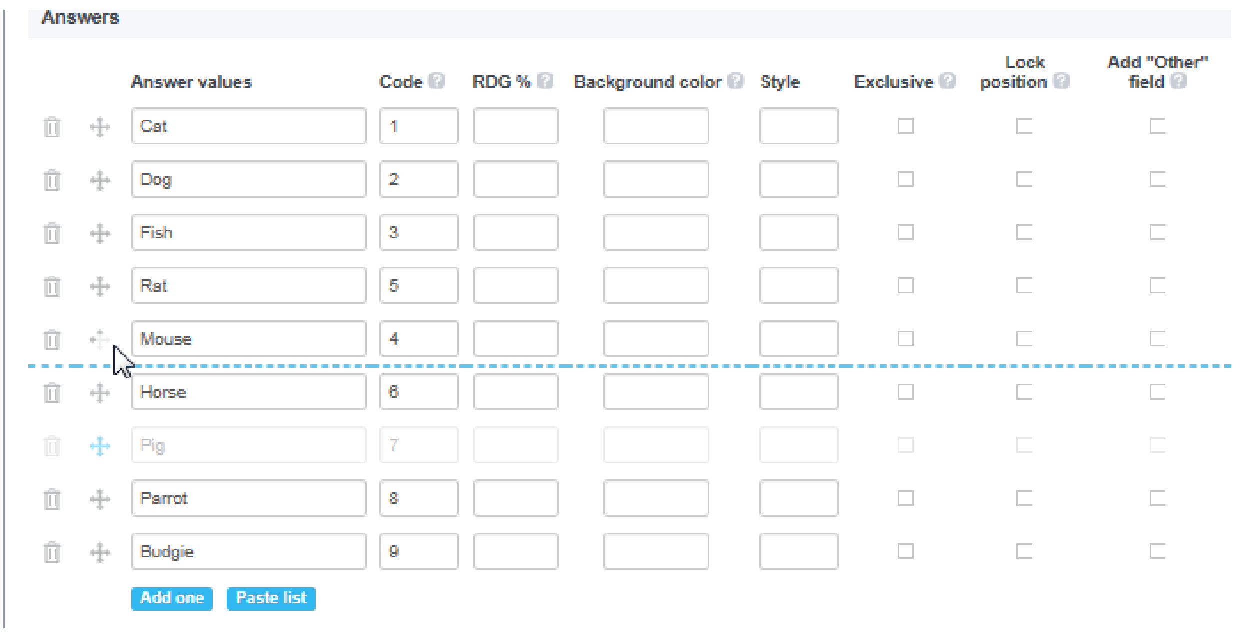


Figure 185 Moving an answer in the list

All changes are saved automatically, and will be incorporated into the survey the next time it is launched.

4.15.9. Dynamic Answers

The Dynamic Answers functionality enables users to quickly and easily mask question answer lists based on previously asked questions. If for example you want to ask your respondents' opinions regarding a number of products, you could first ask them which of a list of products they are familiar with, then mask that list so subsequent questions only ask about the products they have selected.

Note: If you use the Dynamic Answers functionality, this will override code mask scripting. A warning is given on the Script > Masking tab.

To do this:

1. In your survey, create the question on which you wish to base the dynamic answer list - the "control" question.

   Note that a reusable list will be useful here, to ensure the answers for the questions are identical (see Reusable Lists on page 155 for more information).

2. Create the question in which you wish to use the masked answer list.
3. On the question's Details page, in the Answer values field, add the answers that are to be available to the respondent (the reusable answer list from step 1 of this procedure).
4. Click **Actions** towards the right side of the Answers area and select **Add dynamic answers**.

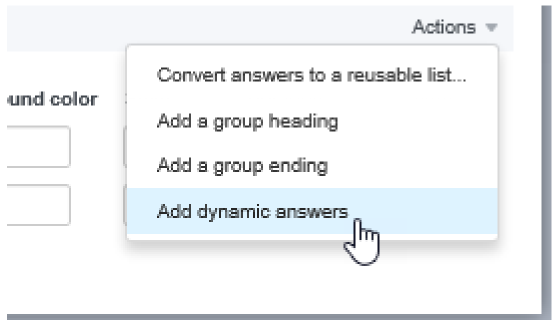


Figure 186 Selecting Add dynamic answers

The Dynamic answers fields appear above the answer list.

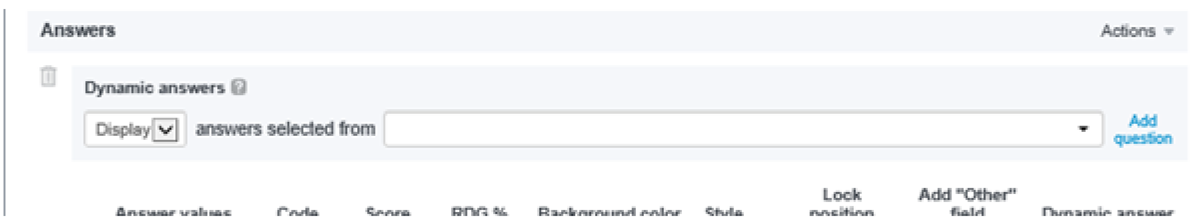


Figure 187 The Dynamic answers fields

5. Click the down-arrow at the right end of the "answers selected from" field to open a list of the previous questions in the survey, and select the question you wish to use the answers from (the question you created in step 1 of this procedure).

   Note that in the event your survey is extensive, you can type in search criteria to reduce the list.

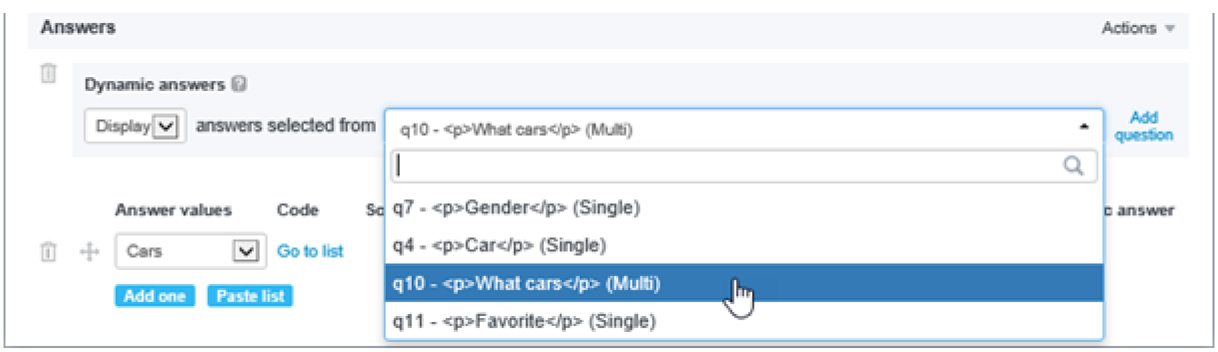


Figure 188 Selecting the question that is to provide the masking

6. Select whether you wish to show or hide the answers that the respondent has previously selected.
7. Make any other settings for the question and answers as required.

The question is complete. When the question is presented to the respondent, only those answers he/she selected in the "control" question will be listed.

Adding other answer options, for example "None of the above"

You may wish to include additional options in your answer list for this question, for example a "None of the above" option. Add the option to the Answer values list in the appropriate place relative to the other answers. Note that in the example below a reusable answer list is used.

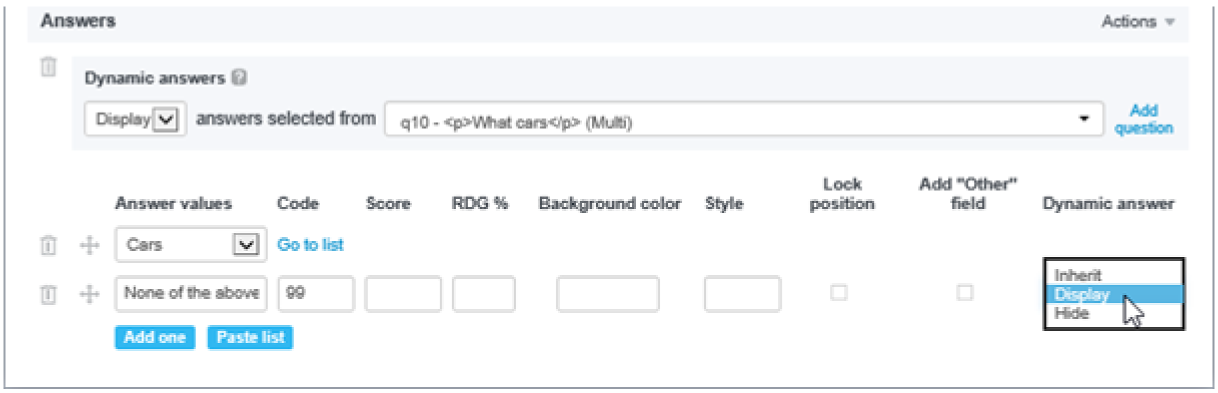


Figure 189 Including a None of the above option

Ensure the Code for the option does not conflict with the codes for the other items in the answer list.

You now have three options for this additional answer:

- **Inherit** - allows the dynamic question mask to control whether or not the answer is displayed.
- **Display** - forces the answer to be displayed, even if a question mask is being used.
- **Hide** - forces the answer to be hidden. This would not often be used but could for example then allow the answer to be set by scripting.

4.15.10. Reusable Lists

Cases may well arise where you wish to use the same list, for example of products, several times in a survey. Confirmit allows you to predefine such lists (see How to Create a Reusable List on page 155 for more information), and then reuse them as often as required. If you change the contents of such a list, this change will be reflected in all questions that use the list.

You can add left and right texts to the list by selecting the property in the list's Property sheet (see How to Create a Reusable List on page 155 for more information).

4.15.10.1. How to Create a Reusable List

To create a reusable list:

1. Go to the Designer page for the survey.
2. In the Survey column, click the **Reusable lists** icon .

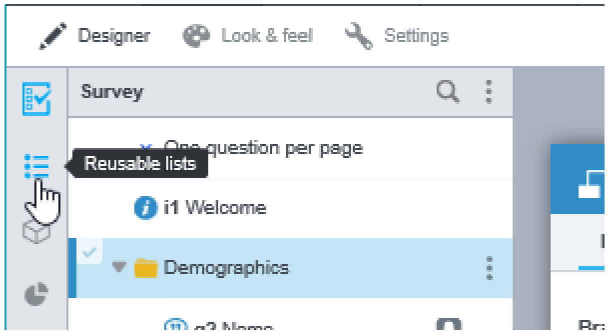


Figure 190 The Reusable lists icon in the Survey column

The Reusable lists pane opens. In the event your survey currently has no reusable lists, then the create new list page opens. If the survey already has one or more reusable lists, then the pane shows all the reusable lists created for the survey. The first list is selected, and the main page area displays the list details overlay for that list.

Figure 191 The Reusable lists page

3. If this will be the first reusable list in this survey, click the green button to add a new list to the survey. If you already have one or more lists available, then click the **Properties** icon for an existing list and then select **Add reusable list before/after** as appropriate.

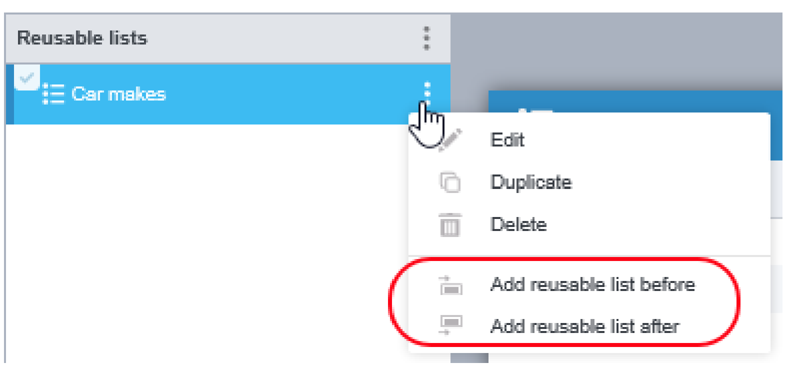


Figure 192 Adding another reusable list to the survey

Note that if your new list is to be similar to an existing list then you could save time by duplicating the existing list and editing the duplicate.

Whichever method you use, a list is added to the column and the list details overlay opens.

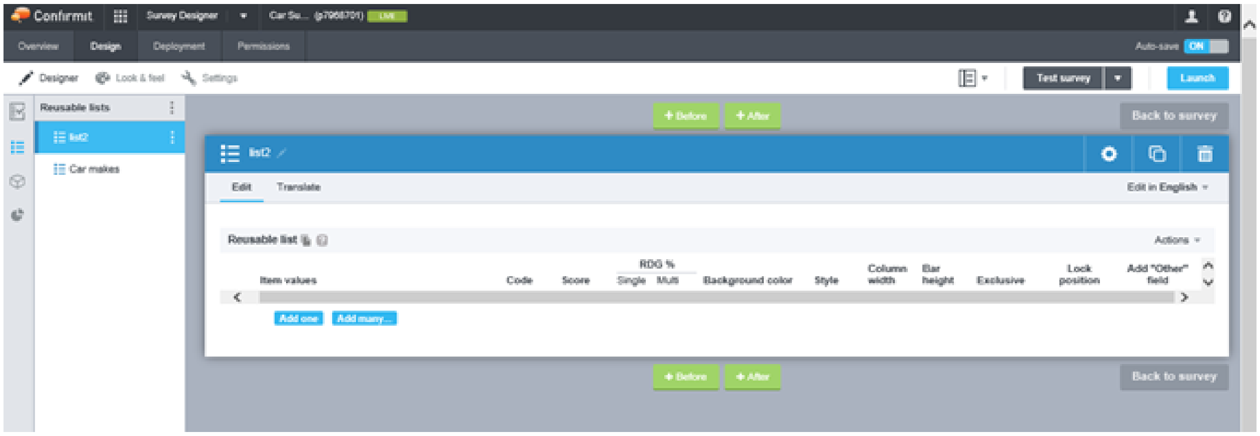


Figure 193 The Reusable list's details page

Note that if you have **Advanced answer settings** selected in the **Item Editor** menu then additional answer settings will be available (see Advanced Answer Settings on page 151 for more information).

4. Click into the list name field and type in a suitable name for your list.
5. Click **Add one** to add an answer row to the list, or click **Add many** to open a pasting overlay where you can paste a previously created list (see How to Paste a List on page 146 for more information). Or you can bulk-paste to include codes and scores (see Bulk Pasting of List Items on page 148 for more information).
6. If you are creating the list one item at a time, fill in the value and the other details as necessary, then either click **Add one** again or press the down-arrow key on your keyboard to add a new row.
7. Repeat as necessary to create the list.

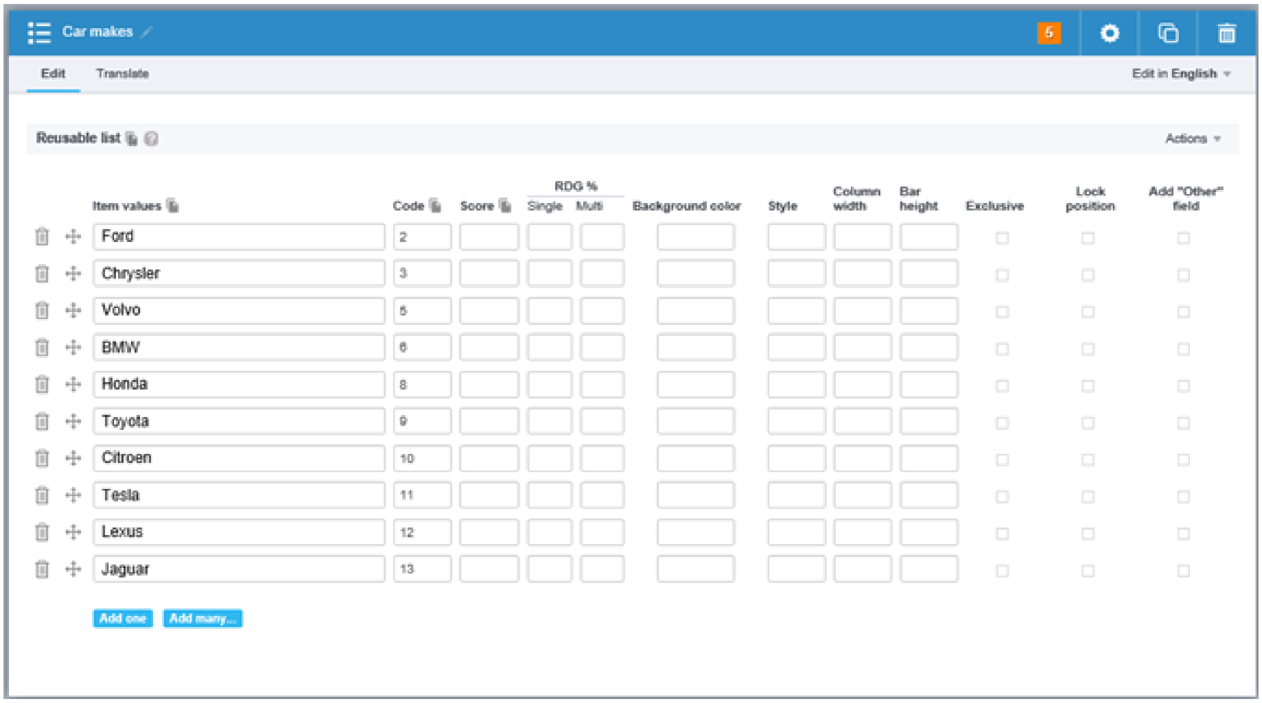


Figure 194 The completed list

8. Set the other list properties as required.

Once you have created the list, you can use it anywhere in the survey. You can edit the list at any time; either reopen the Reusable lists page and select the list you wish to work with, or if you are in a question that uses the reusable list, click the **Go to list** link at the right of the list selection field to open the reusable list directly. If you change the list, the changes will appear in all locations where you have used it.

Click the **Copy Columns** icon to copy the data in that column to your clipboard so you can use it elsewhere.

Note that you can include left and right texts for the reusable list. To activate this, click the cog-wheel icon in the list details page toolbar to open the Properties page, then check the box. A second column of label fields appears allowing you to add the right texts.

If you click **Back to question** (above and below the right side of the list) you will be returned to the Designer page at the last question you were in before you opened the Reusable list page.

4.15.10.2. How to Convert an Answer List to a Reusable List

If you have a list in a question (it could be an answer list, scale or prompt list) that you find you need to use in several other questions, then you can convert that answer list to a reusable list. It will then be stored in the Reusable lists pane and will be available for use as any other, and the list you have converted from will automatically become a copy of the reusable list. So for example the question’s individual answer list will become a link to the reusable list, and you will update the answer list for that question by going to the reusable list.

To create a reusable list from an answer list:

1. In the survey, click on the question that has the answer list you wish to convert, to open the question details page.
2. Open the Actions menu towards the upper-right corner of the answer list.
3. Select **Convert answers to a reusable list**.

   The Convert to reusable list overlay opens.

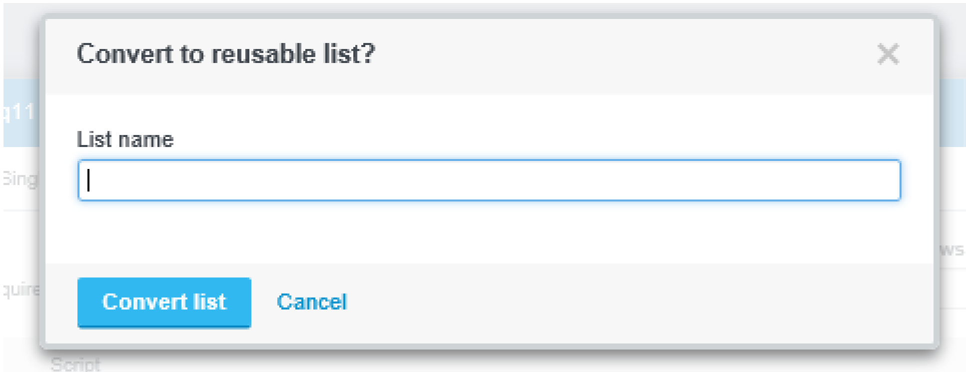


Figure 195 The Convert to reusable list overlay

4. Type a name for your list into the List name field.
5. Click **Convert list**.

   The answer list is converted to a reusable list, and this now appears in the Reusable lists pane. The list you have converted is now a copy of the reusable list.

4.15.10.3. How to Use a Reusable List

Once you have created a reusable list, you can use this list as the answers to any question in the survey that uses an answer list. For grid questions you can use reusable lists for the prompts and the scale, and for 3D-grid questions you can use them for the prompts.

While the Reusable lists page is open, if you click **Back to question** (above and below the right side of the list) you will be returned to the Designer page at last question you were in before you opened the Reusable list page.

To use a reusable list as the answer list for a question:

1. Open the question details page for the question you wish to add the reusable list to.
2. In the Answers area, towards the right side of the page, click **Actions** then select **Add a reusable list**.
3. The first reusable list available in the survey is automatically added to the Answers area.
4. If you have more than one reusable list in the survey and you wish to use a different one, click the list name where it appears in the list of answers and select the list you wish to use.

Note that you can add more answers to the list for the specific question, and you can use more than one reusable list in a question.

4.15.11. Codes

When designing a survey, the options available for you to use as the answers to your questions are limited only by your imagination. To simplify the data processing therefore, rather than using the "user-defined" question and answer texts in the database, the Survey Designer allocates codes to each question and to each answer option for each question. The code used to identify a question is the "Question ID" (see The Question ID on page 102 for more information), and that used to identify an answer option is termed the "Code". Each Question ID MUST be unique for the survey, and each answer code MUST be unique for a question.

For single questions and the items of a grid, the codes are stored in the database as string values. For multi questions the codes are used together with the Question ID as the variable name. For example a multi question q1 with three answer alternatives with the codes 1, 2 and 3 will give the three variables q1_1, q1_2 and q1_3 in the database. The same logic applies for the elements of a grid.

When creating the answers for a question, you can apply codes to the answer options manually by typing the desired codes into the fields in the Code column on the question's Answers tab. If a code is not supplied manually, then in most cases one will be allocated automatically when the question is saved. This automatic code will be equal to the answer's position in the list, starting from 1. Note that in some cases the codes will not be allocated automatically until the survey is launched. Cases where codes will NOT be allocated automatically include:

- Answer lists in the “Scales and Lists” folder because these may be used in different contexts, before or after other elements, and may also contain one or more “Scales and Lists” items.
- Answer lists that contain a reference to one or more reusable scales or lists, for the same reason as above.
- Answer lists containing a reference to a “Loop Reference” list because the content of these can be dynamic.

Note that in all these cases you can set the codes manually.

Note: When creating codes manually the ampersand character (&) must not be used as this can cause problems with scripting.

Important
If you change the answer list while a survey is running, you MUST ensure that the codes follow the original answers.

Codes can only contain alphanumeric characters, with no white space. The default maximum length is 32 characters, though you can change this by typing a value (maximum 50) into the Field Width field in the question's Properties sheet. Illegal characters will cause the database compilation to abort. A maximum of 50 characters will not be a problem for single questions, however problems will arise during launch if grid and/or multi questions use the full 50-character codes - see the note below.

Note: In the database, the column headers are constructed as a combination of the question id and the code, and are limited to 50 characters. If this limit is exceeded for a header, then an error message will be displayed when you attempt to launch the survey. Care must therefore be taken when allocating codes for grid and multi questions if the code maximum has been increased above its default setting.

Important
For a question that includes a loop reference, any non-loop reference answers must be given codes manually. These answers cannot be allocated codes automatically as the loop reference will very likely cause duplicate codes to be generated.

4.16. Conditions

Use Condition nodes (see The Condition Node on page 85 for more information) to create "Skip logic" in your survey. This alters the flow of a survey depending on the answers given to other questions.

A condition item consists of either two or three parts; an IF condition, a THEN clause and an optional ELSE clause. The flow is controlled by a Boolean expression in the IF condition; the expression is designed to evaluate to either TRUE or FALSE. If the expression evaluates to TRUE, the survey-mechanism will execute the items in the THEN node. If the expression evaluates to FALSE, the items in the ELSE node are executed (when the ELSE node exists), otherwise the survey moves on to the next question.

Create the condition logic either by using the condition builder functionality that is included in Survey Designer (see How to Build a Condition on page 161 for more information), or by typing JScript code ‘manually’ into the Expression field in the condition.

Important
If a condition uses scripting then the script will override any categories put in place using the condition builder. A warning message will then be displayed in the condition.

The example shows a conditional item in a survey, where if the respondent’s answers to two questions both match the selected values then the survey stops. In this case there is no ELSE node

Figure 196 Example of a conditional item in a survey

You can create groups within conditions (see Condition Groups on page 167 for more information).

When creating a condition, the condition builder uses the question name. If a question name is later changed, then any condition that is based on that question is updated automatically. If a question that has been used in a condition is deleted, then a warning is displayed.

4.16.1. How to Build a Condition

You can build Conditions using the Condition Builder functionality described here, or you can create them using scripting. Note that if scripting is used then this will take precedence over logic created using the builder, and a message will be displayed in the condition to inform you of this. If script is used in a condition then it will be displayed in the Survey column beside the condition ID, and a message will be displayed on the question details page to warn you that it exists and will therefore take precedence. If script is not used then the condition ID will include the question on which the condition is based.

To create a condition using the Condition Builder:

1. Create a Condition node in the survey (see How to Add Items to the Survey on page 93 for more information).
2. Open the node's Details overlay (for a new node it will open automatically).

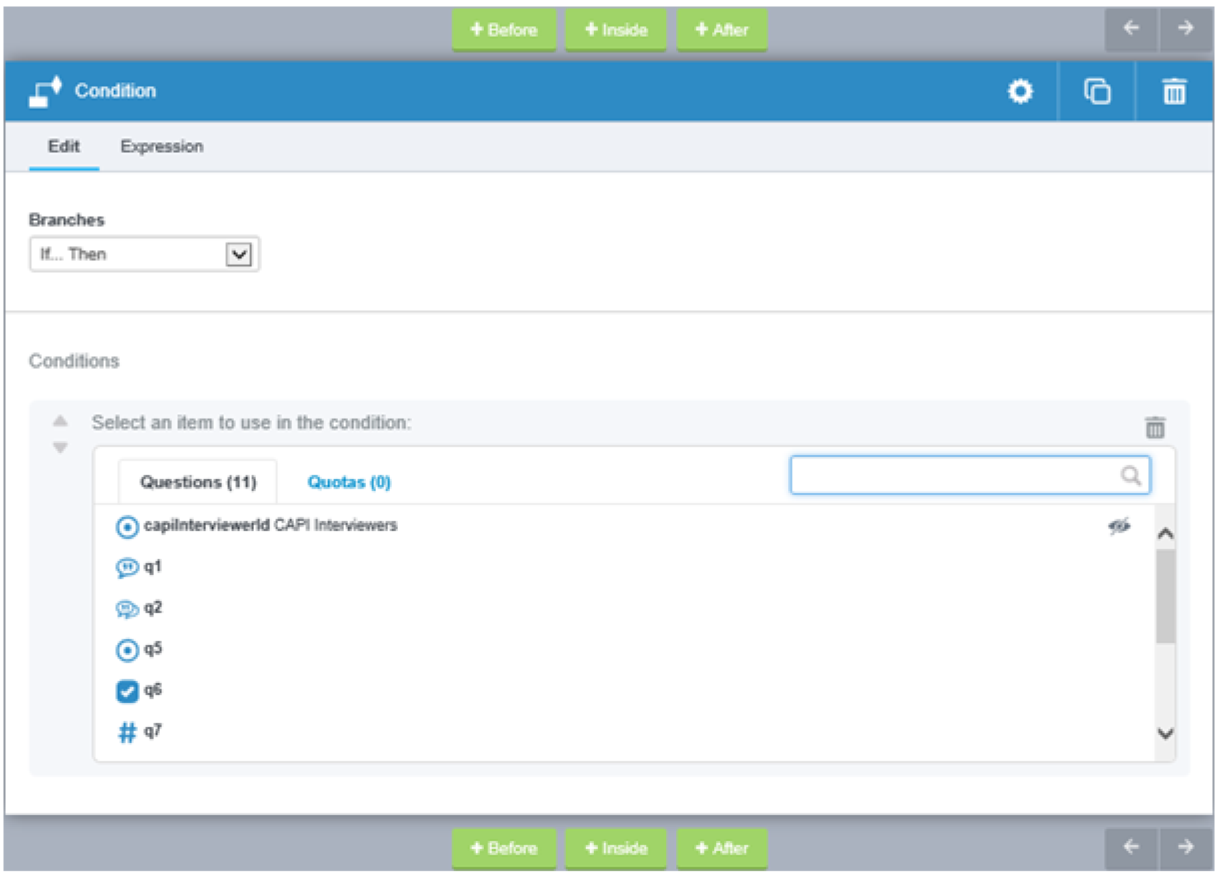


Figure 197 Example of the Details overlay for a Condition node

The Details overlay shows a list of all the questions and quotas in the survey on which the condition can be based. The totals of each are given in the tab headers; in this case 11 questions and no quota are available. The questions are listed in the order in which they appear in the survey.

If you have a large number of questions in your survey, then the first 50 will be listed. You can filter the questions to reduce the list to find the question(s) you wish to work with. To do this, type characters into the Search and filter field; the filter will update the list of questions as you type to show only those questions that include the entered character string. The Search and filter field is not case-sensitive.

3. In the Branches drop-down, select the branches you wish to include in the condition; **IF-THEN**, or **IF-THEN-ELSE**.

   This procedure describes the IF-THEN-ELSE setup. In the event you wish to create an IF-THEN condition, merely ignore the ELSE part.

Note: If you change a condition from IF-THEN-ELSE to IF-THEN, any items in the ELSE branch will be deleted. If you wish to keep these items, move them elsewhere in the survey before you change the condition.

4. From the lists of questions and quotas, select the item that you wish to build the condition on.

   The answer options for that question are displayed. Note that the codes are given for each answer.

Important
The exact procedure from here on will depend on the type of question you have selected; different question types require different fields and options. This procedure uses a Multi question.

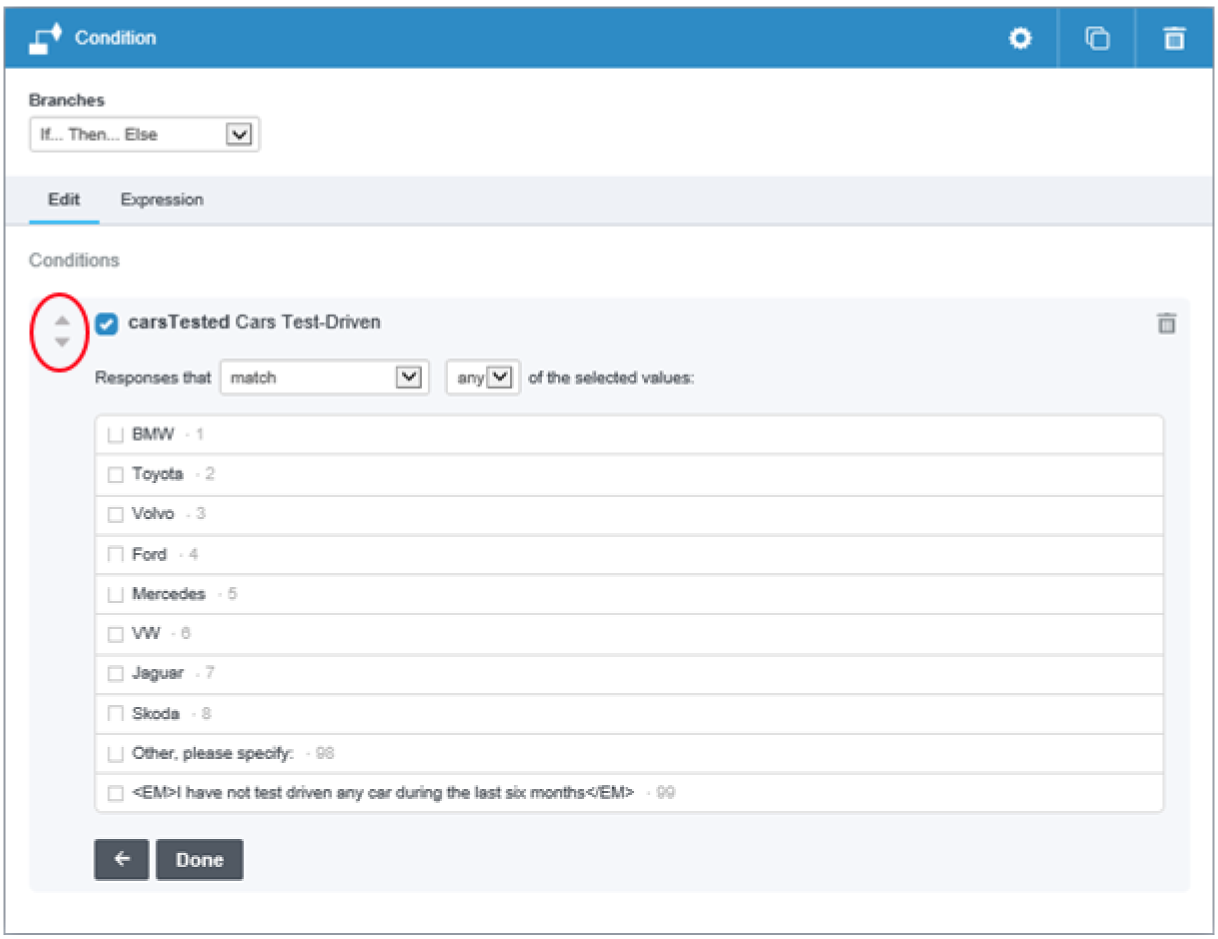


Figure 198 The answer options for the selected question

5. In the Responses drop-down, select the option(s) you wish to use in the condition.

Note: The selection system is dynamic; at all times the system only shows you information, options and input fields that are relevant to what you have already selected. The options Match, Don't match, Answered and Not answered are common for the majority of question types, and other options may be available as appropriate. None of the input fields here are case-sensitive.

If you select more than one answer option, for example in a multi question, you can choose whether all the options are to be matched or whether any are to be matched. The resulting logic will be either **a AND b AND c**, or **a OR b OR c**.

If you have more than one category in the condition, you can re-order the categories within the condition using the up and down buttons to the left of the question name (ringed in the figure above).

6. Select the answer options that are to be included in the condition, then click **Done**.

   A summary of the condition so far is displayed. The field names, operators and values are written out in the form of a sentence (not using symbols) describing the condition, so the condition's expression can be read and more easily understood - ringed below. Note that you can add conditions within conditions to build multiple levels of logic.

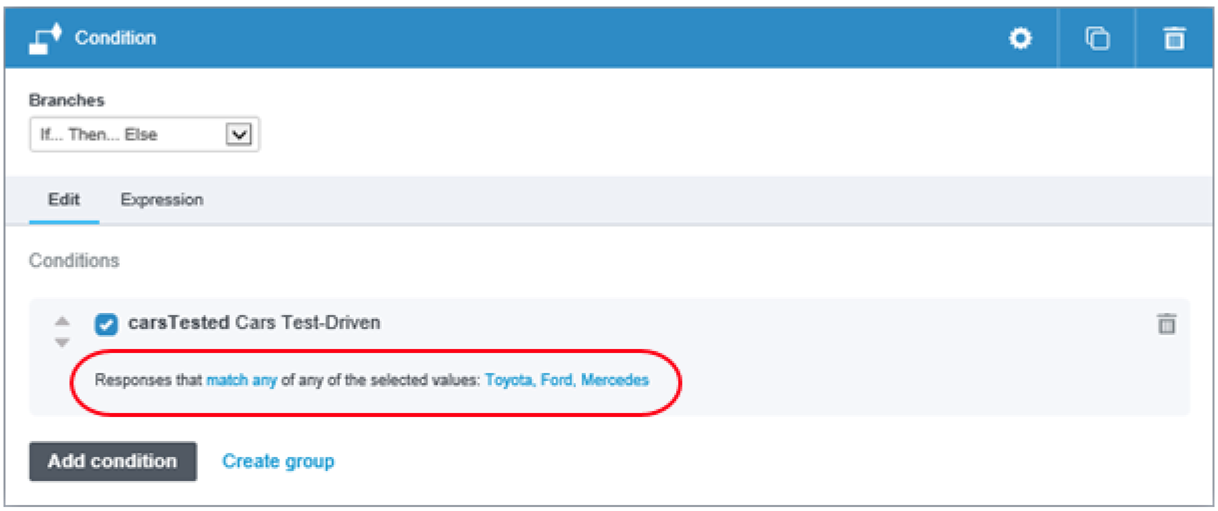


Figure 199 The condition summary

You now need to add the THEN clause that is to be enacted if the logic evaluates to TRUE.

7. In the survey pane, click on the THEN item.

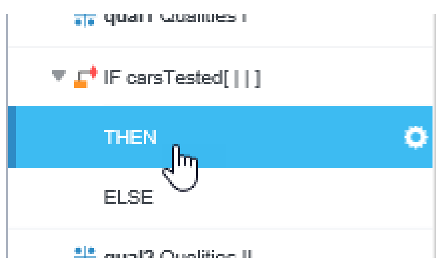


Figure 200 Adding the THEN clause

8. Click the green **+ Inside** button in the design area to open the Add Item overlay (see How to Add Items to the Survey on page 93 for more information), and add the item you wish to be enacted if the logic evaluates to TRUE.

For example this could be a question or information item that only applies if the respondent has selected a specific answer in a previous question, or it could be that you want to stop the survey if the respondent has given a particular answer to another question.

Once you have added the THEN item, if you are not using the ELSE clause then the condition is now complete.

If you have selected to use the ELSE clause then it will be included in the Survey pane and you add the appropriate item in the same way as you added the THEN item.

9. Click the green **+ Inside** button to open the Add Item overlay (see How to Add Items to the Survey on page 93 for more information), and add the item you wish to be enacted if the logic evaluates to FALSE, in other words, if the THEN item is not enacted.

The condition is now complete. For ease of reference the full text of the condition is written into the survey column beside the condition item. If the column is not wide enough to show all the text then the text will be truncated - hover the mouse pointer over the condition to view the full text in a pop-up.

Note: If you attempt to create an invalid condition it will not be saved and a message will be displayed informing you of this. Note also that if the condition is valid then it will be saved; if you have made a mistake and used for example the wrong question, the system cannot know this - check your work.

Note that any changes you make to a condition can be undone in the Designer log (see The Designer Log on page 24 for more information).

4.16.2. Creating Expressions

To assist in the scripting process for Condition nodes, you can convert UI conditions into expressions. You can generate the expression from a previously created set of UI-based conditions, and you can then adjust the expression. You can also use the condition builder to help create new expressions, which will be useful when you can't remember the exact expression or the codes that you need to base your expression on.

Note: When you click Generate expression, the conditions will not be removed as you may want to revert your decision. However as has always been the case the expression will take precedence over any UI-based conditions.

To convert a condition into an expression:

1. Open the condition and go to the Expression tab.
2. Click **Generate expression**.

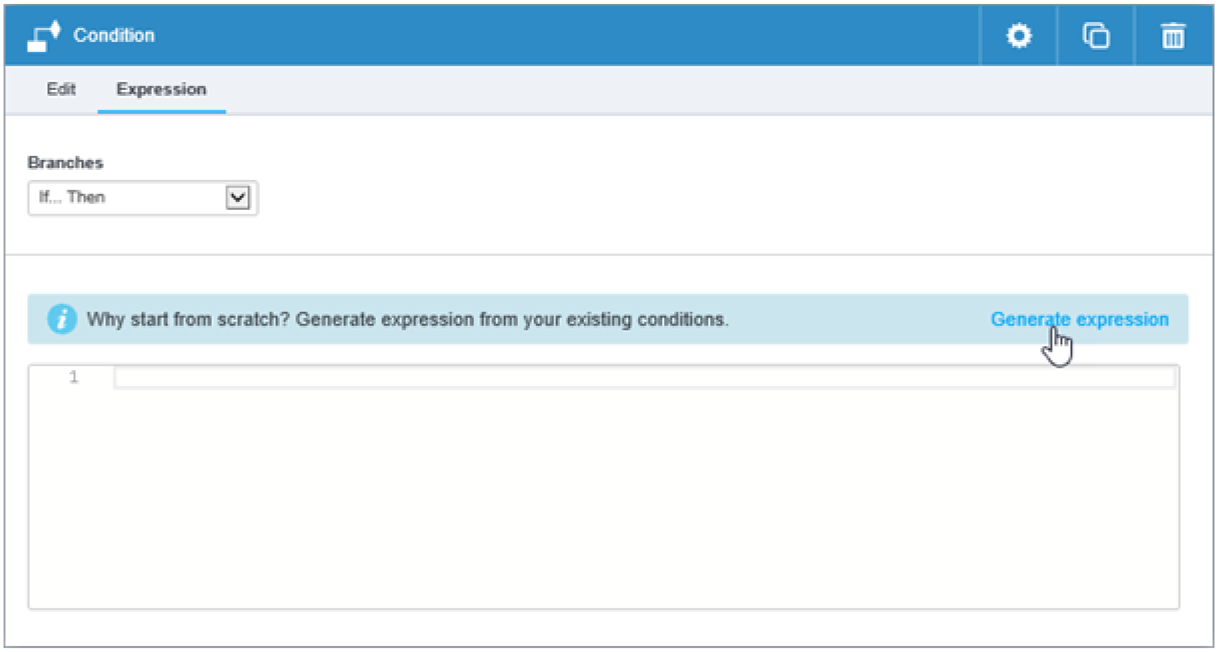


Figure 201 Generating the expression from the existing condition

The expression is generated in the expression field, and the button changes to **Open condition builder** so you can more easily edit the expression.

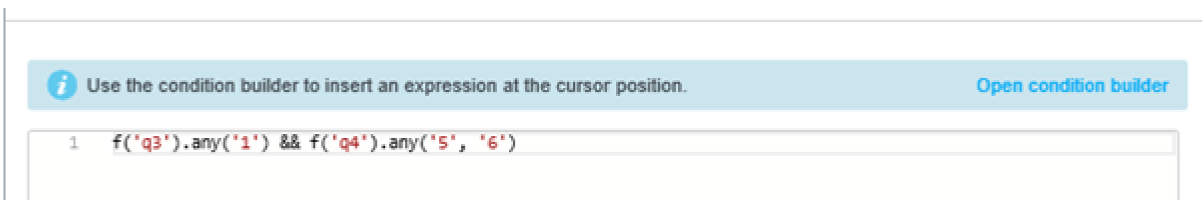


Figure 202 The expression

3. To edit the generated expression using the condition builder, click the button.

   The condition builder overlay opens.

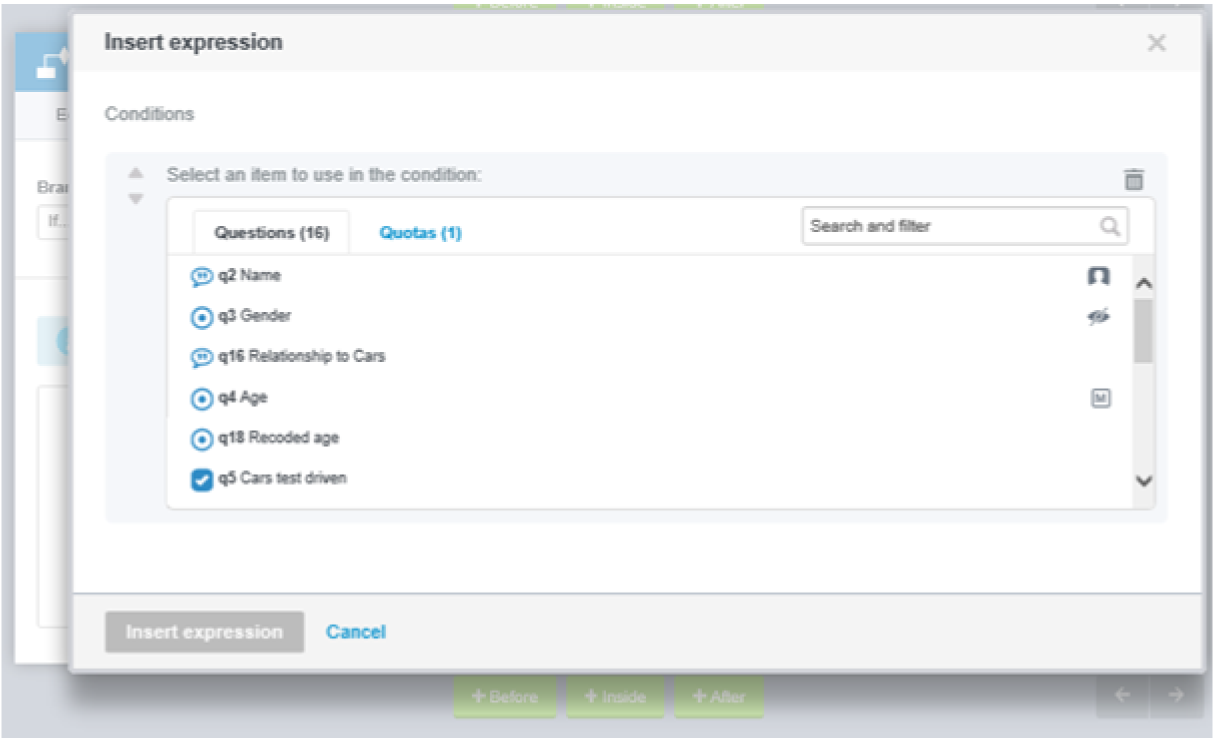


Figure 203 The condition builder overlay

You can now add further conditions to the expression as necessary.

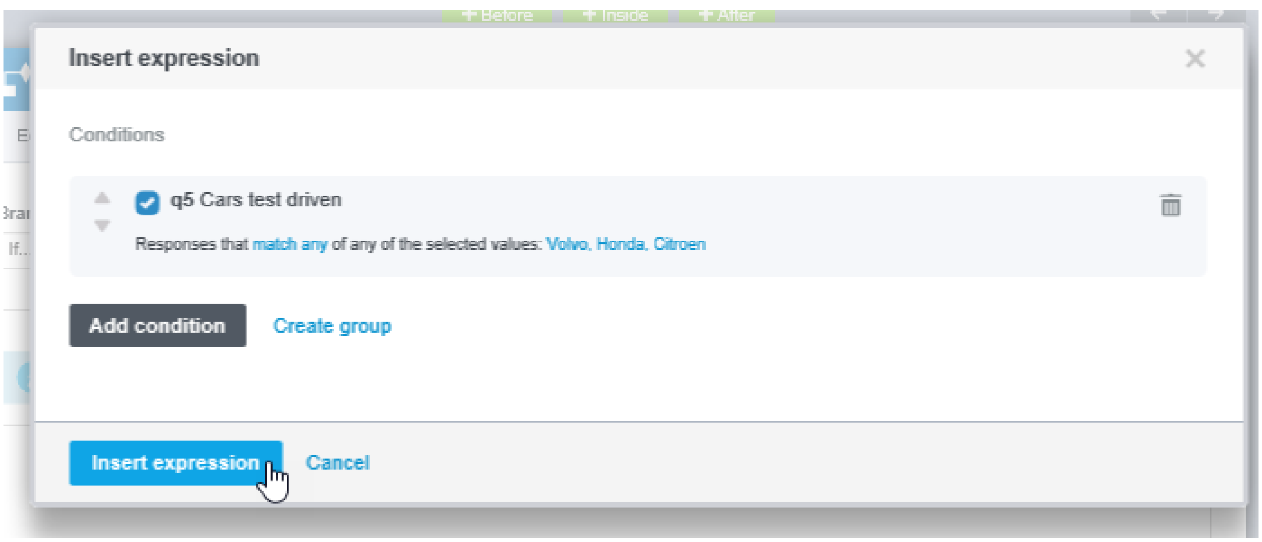


Figure 204 Adding additional conditions to the expression

4. Click Insert expression to add the new conditions to the expression.

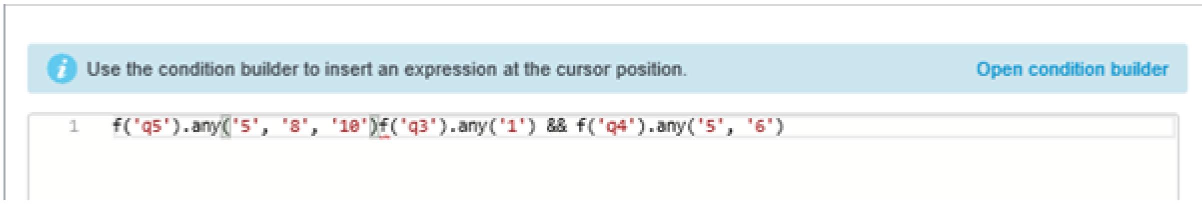


Figure 205 The complete expression

4.16.3. Condition Groups

Grouping condition categories allows you to increase the power of the condition, adding in other clauses and in effect adding parentheses around categories.

In this example an employee satisfaction survey has registered amongst other data, which city (office) the respondent works in, how long they have been with the company, and whether they have a pension plan. A condition then displays an additional information page to those employees who have worked in a specific city for longer than a specified time but who do not yet have a pension plan. Perhaps changes to the company's pension arrangements now allow employees in other cities the same benefits, so you wish to add that city category to the condition.

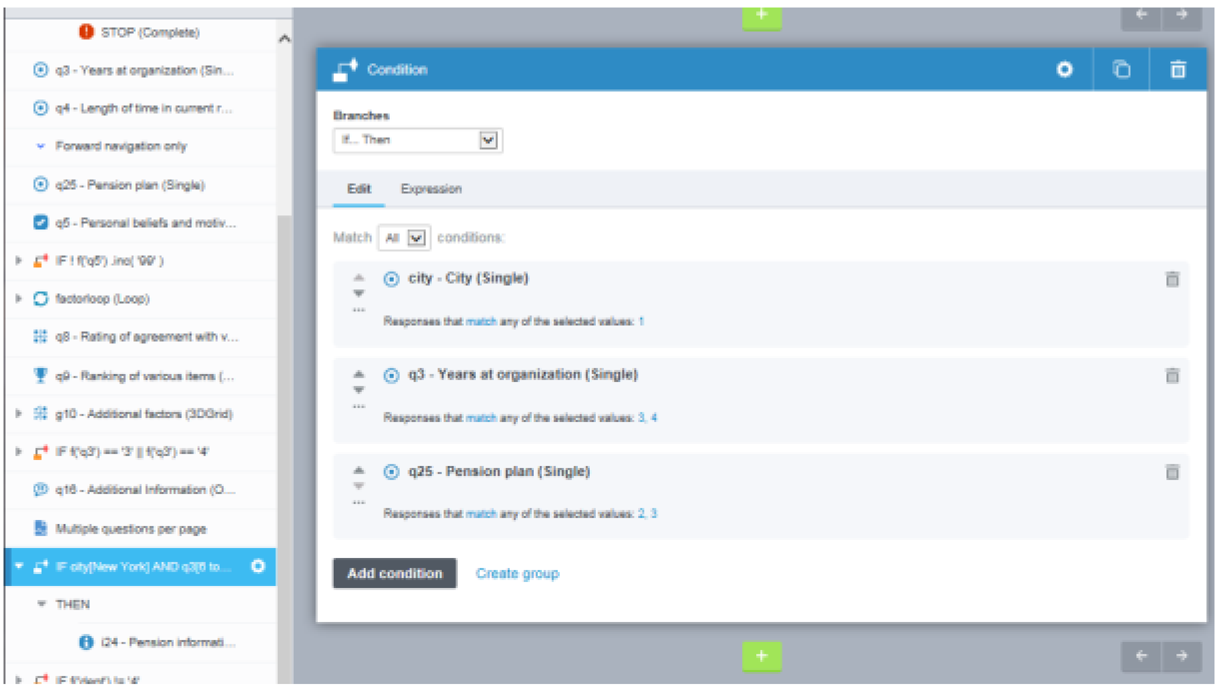


Figure 206 Example of a simple condition to display an information page to relevant employees

1. Add the new city category to the condition.

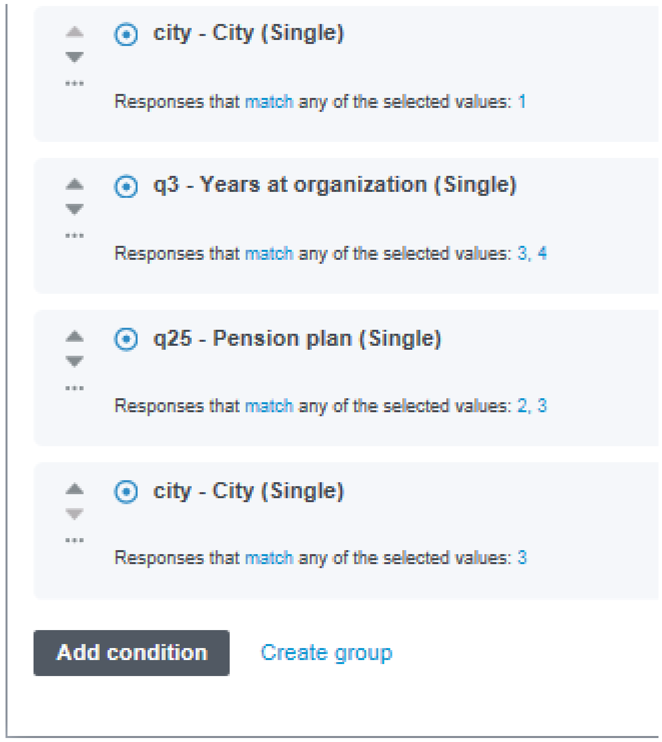


Figure 207 The additional city is added

2. Click **Create group** at the bottom of the page.

   Check-boxes are displayed beside each category.

3. Check the appropriate boxes (in this case the two City categories) and click **Save group**.

Note: In this case you could simplify the condition's groups by combining the two City categories into the same condition.

The list of conditions is rearranged and the selected conditions are grouped. You must now select whether you want to match all the conditions in the group, or any of them. This allows you to create a very targeted sample group. In this example you would need **Any**.

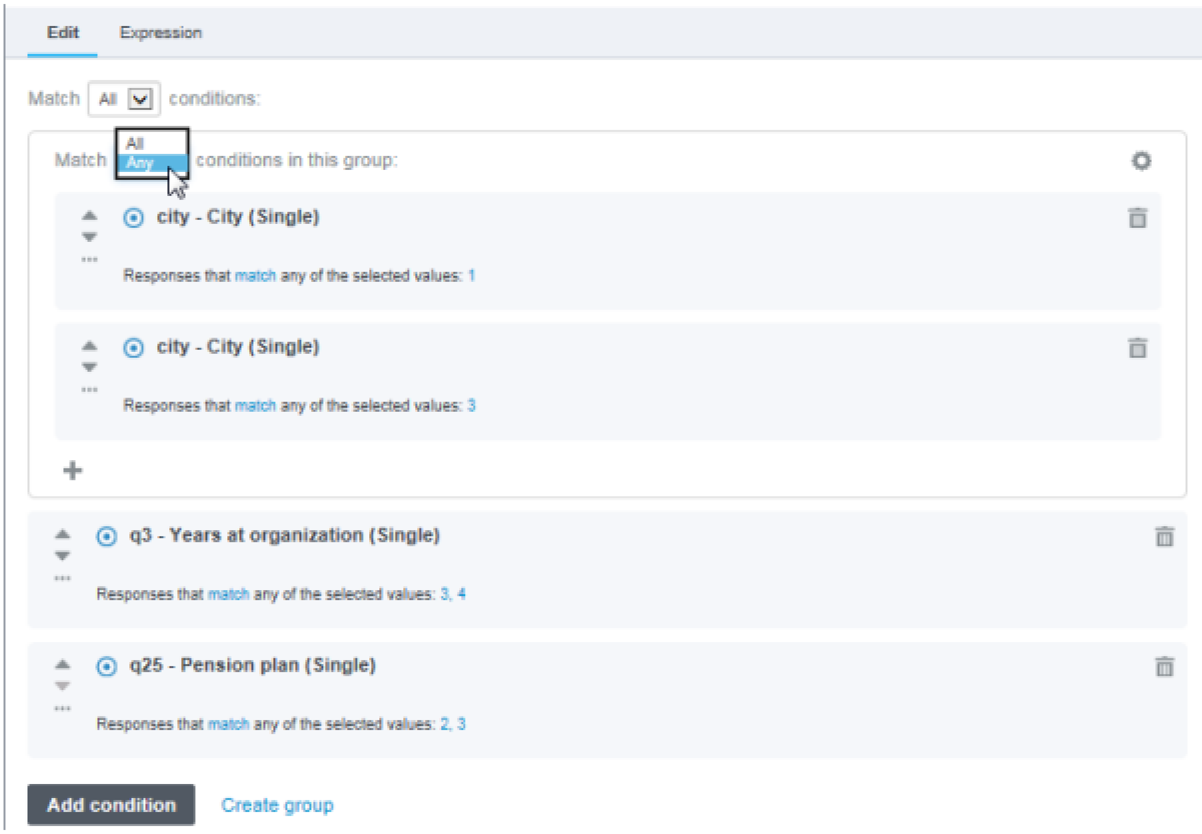


Figure 208 The city categories are grouped and Any is selected

The grouped condition is complete. Now the information page will be displayed to those employees who have worked at either city 1 or city 3 for longer than a specified time and who do not yet have a pension plan.

You can edit the group, adding or removing conditions and changing the expressions, at any time. To add a category to the group, click the + icon; to edit a category, click on the appropriate blue link within the category. You can re-order the categories within the condition using the up and down buttons to the left of the question names.

4.17. Scripting in Questions

All question types allow you to include scripting. Scripting enables you to:

- Create conditions to control the respondent’s path through the survey.
- Create column (3D grids) and question masks to control whether or not a question is to be displayed.
- Filter the lists displayed in questions and the iterations in loops based on previous answers.
- Perform text substitution.
- Perform custom validation of user input.

To use the scripting functionality in a question, on the question details page for that question go to the **Script** tab. The scripting fields available to you will depend on the question type.

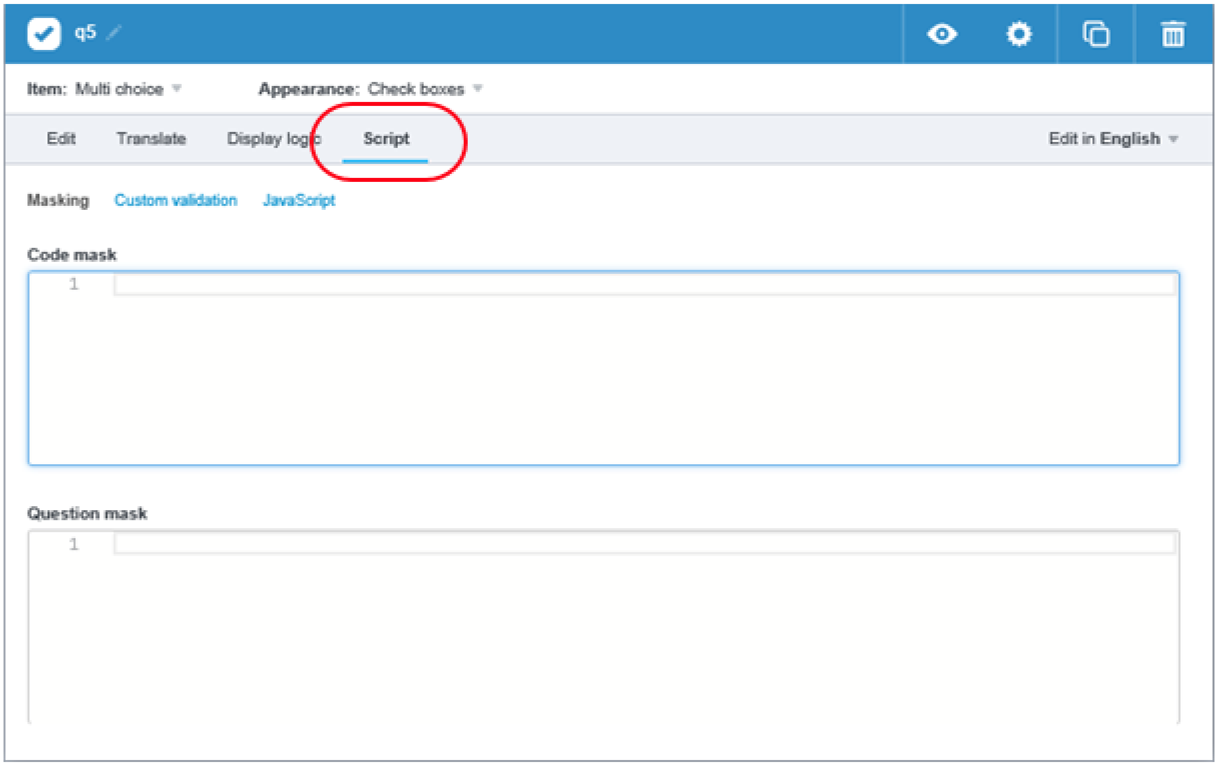


Figure 209 Example of the Script tab for a multi question

The Script tab has three sub-tabs.

- It opens at the **Masking** tab and here, depending on the question type, you can add Code masking (see Code Masking on page 173 for more information), Scale masking (see Scale Masking on page 173 for more information) and Question masking (see Question Masking on page 173 for more information).
- The **Custom validation** tab allows you to enter script code to validate the answers provided by the respondent (see Custom Validation on page 174 for more information).
- The **JavaScript** tab allows you to add client-side JavaScript to questions (see JavaScript on page 174 for more information).

All scripting fields provide syntax highlighting and code completion (see Syntax Highlighting and Code Completion on page 170 for more information).

4.17.1. Syntax Highlighting and Code Completion

The Syntax Highlighter automatically color-codes key words, and provides lists of selectable options under specific conditions while you are scripting to assist you with completing your code. This means that while scripting you no longer need to remember the functions, or look up which properties belong to which classes and which parameters the various methods accept.

To use the code completion functionality:

1. Start typing into the scripting area the function you wish to use.

   A drop-down list of the possible functions that include the characters you have typed, is presented, the first item in the list being highlighted.

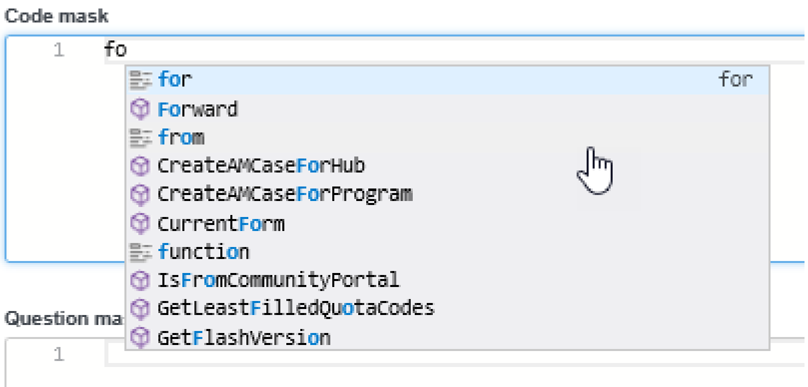


Figure 210 Example of the code completion functionality

2. Click on the function you wish to use to add it to the script field.

Or

3. Use the **Up** and **Down** arrow keys on your keyboard to move the highlight through the list.

   While you move through the list, addition information may be presented.

Figure 211 Additional information

4. Click the **Information** icon  for an item or press the **Ctrl+Space** keys on your keyboard while the item is highlighted, to open a pop-up with more information.

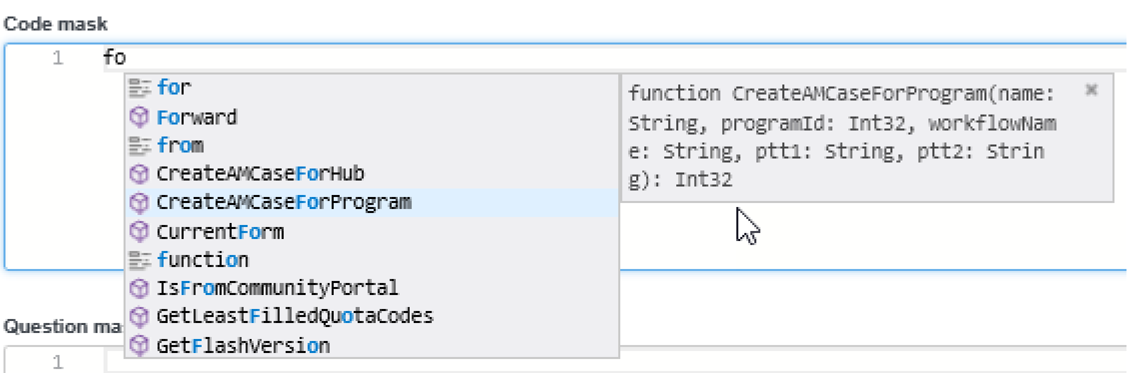


Figure 212 The Information icon opens a help pop-up

5. Once you have selected a function, you can hover the mouse pointer over it to display the possible options.

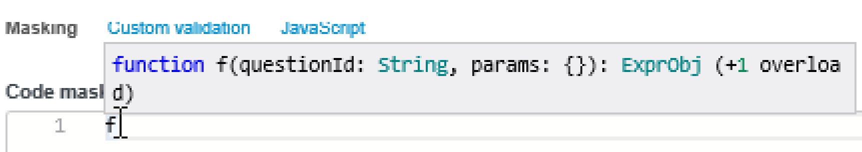


Figure 213 The options relevant to the selected item

6. To open a complete list of all the available functions, press **Ctrl+Space** without first typing anything into the scripting area.

   You can now drag the scroll-handle on the right edge of the list, or use the **Up** and **Down** arrow keys on your keyboard, to move through the list and select the function you wish to use.

Tip!
Note that **Ctrl+Space** will open a list of the relevant functions at the cursor at any time, so you can get assistance while editing the script later.

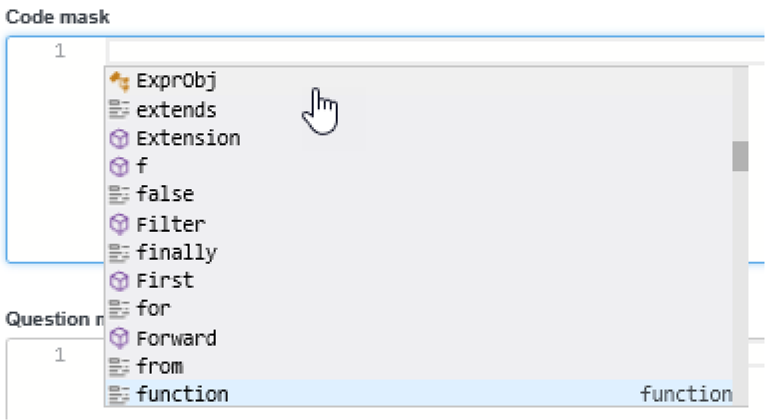


Figure 214 The complete list of functions

7. As you type further characters into the field, the options available are presented. In the example below a **(** character has been typed after the **f**. The corresponding required **)** character is then added automatically and the cursor is positioned between the two ready for your next entry.

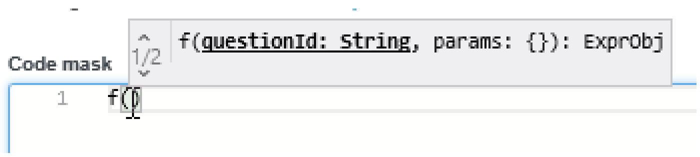


Figure 215 The (and) characters are added

8. Continue typing the script, in this case a **"** character. Again, the required second **"** character is added automatically.

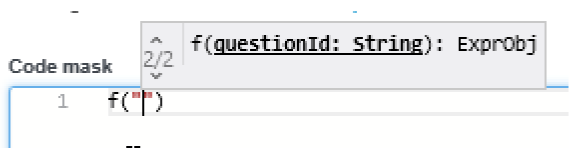


Figure 216 The two " characters are added

9. Add in this case the **qid**, and then the point **.** character on the end.

   When you add the point character, a list of the methods available for f() is presented.

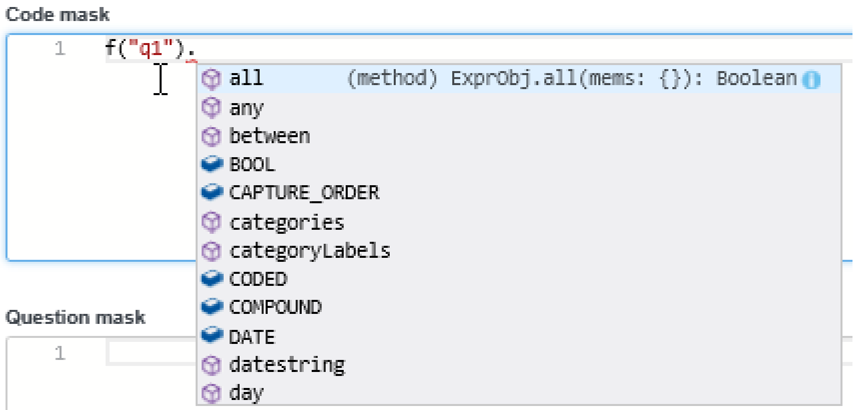


Figure 217 The list of the methods available for f()

Continue building the script as required.

4.17.2. Code Masking

Code masks are used to filter the answer lists of 3D-grids, grids, single, multi, ranking, open text list and numeric list questions, and to select a set of iterations for a loop. In the Code mask field on the Script tab of a question details page, or in the loop construct (see Loops on page 174 for more information), use a Jscript expression that evaluates to a set of codes. The answer list (or loop member list) will be filtered based on the set of codes in the Code mask field.

4.17.3. Scale Masking

Scale masks are used to filter the scale lists of grid questions. Use the Scale mask field on the Script tab of a grid question's Details page to enter a Jscript expression that evaluates to a set of codes. The scale list will then be filtered based on this set of codes.

4.17.4. Question Masking

Question masking is used to dynamically exclude and include questions in surveys. If you want to dynamically exclude a question, use this field to create a Jscript expression that evaluates to a Boolean value (true or false), as when you create a condition (see How to Build a Condition on page 161 for more information). If the Jscript expression is evaluated to ‘true’ the question is displayed; if it is evaluated to ‘false’ the question is not displayed. If you leave the field empty, the question is always displayed.

4.17.5. Triggering Questions

The Triggering Questions functionality enables you to refresh parts of a page depending on changes made in other parts of the same page. For example, you can specify that question 2 is presented once the respondent has provided an answer to question 1.

Assume you wish to ask the respondent why he/she chose a particular answer to the previous question. To do this:

1. Create a page.
2. Add a question item to the page, and provide the appropriate answers.
3. Add a second question, for example a Text question, and include the text to elicit the supplementary information.
4. Go to the second question's **Script > Masking** tab, and in the Question mask field add the script f("q1").toBoolean().
5. Click into the Triggering questions field and select the question you wish to use as the trigger, in this case the first question on the page.

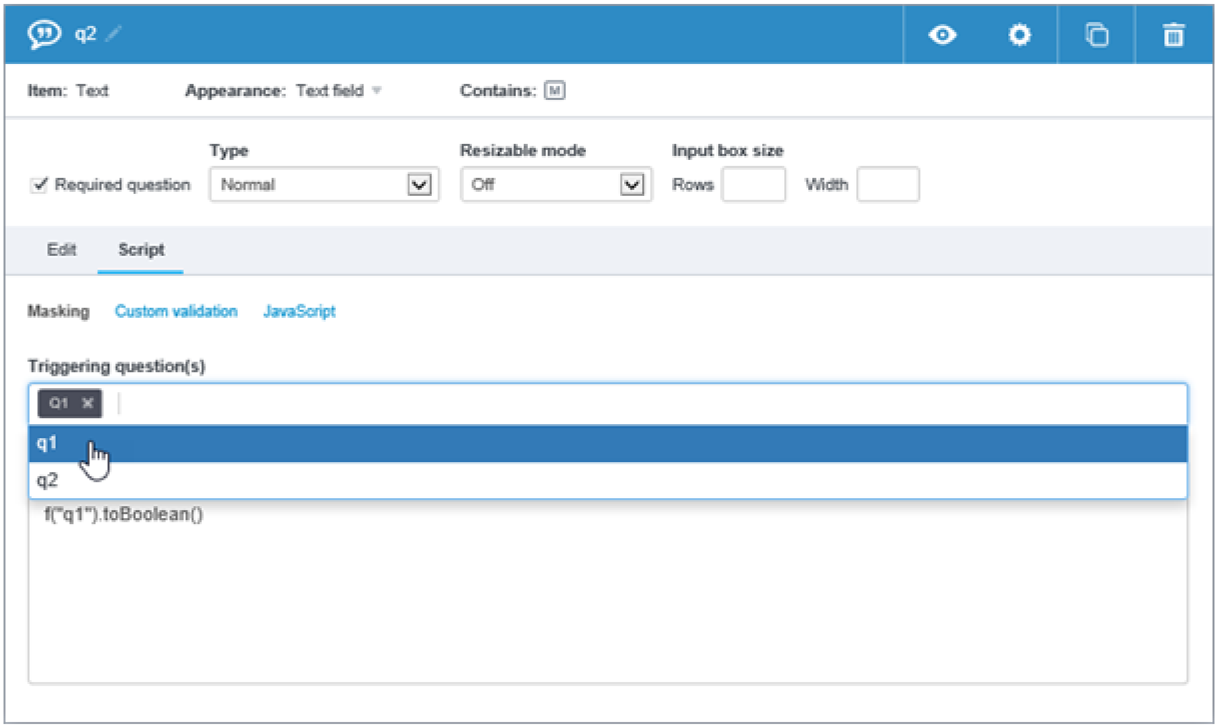


Figure 218 Selecting the triggering question

6. Test the survey.

4.17.6. Custom Validation

For all questions, you can enter script code to validate the answers provided by the respondent. Depending on the complexity of the validation problem, creating this code may require a more in-depth knowledge of JScript than can be presented in this document. See the Confirmit Scripting Manual for further details.

4.17.7. JavaScript

This tab allows you to add client-side JavaScript to questions, and have it executed once the question has been rendered and any features have been initialized. The JavaScript tab is available for Info, Single, Multi, Open, Grid and 3D-Grid questions (not the questions inside a 3D-Grid).

4.18. Loops

A loop is a special type of folder, where the questions inside the loop will be repeated for a number of iterations. You may want respondents to provide feedback on a number of items (a list of products perhaps), using the same questions for each item. To do this, you put the questions inside a Loop. If the respondent has previously selected the items from a longer list, then you can base the loop on the items the respondent has selected. Then when the respondent reaches the loop, the survey will ask the same questions for each item that the respondent has selected, and will move on to the next question once it has received answers for each item.

For example, assume you wish to repeat a block of questions for a list of car makes. Instead of defining the same block of questions for each car, only changing the car name for each block, you can simply create a loop that iterates through the list of cars asking the same question(s) for each (see How to Create a Loop on page 174 for more information).

4.18.1. How to Create a Loop

To create and set up a Loop item:

1. In the Survey column, add a Loop item to the appropriate location using the normal methods (see How to Add Items to the Survey on page 93 for more information).

   The Loop item's question details page opens.

2. Edit the loop object's name as required.
3. Select how the answer list is to be sorted.

   This answer list is the list of iteration values that you will add later in the procedure, such that the questions in the loop are asked for each iteration value.

4. Consider setting a field width to be used when exporting.

   During an export task this will limit the number of characters allowed in the database fields for responses to the loop question(s).

5. Consider setting a progress bar weight.

   The progress bar weight is the estimated number of iterations through the loop that will be performed by a respondent when answering the loop question, that is, the number of iteration values that are "used". For example, if you are inviting the respondent to answer questions on five different products, then the respondent will go around the loop five times so you would input 5 in this field. If the number of loop iterations experienced by the respondent depends on the respondent's answers to earlier questions, then you will need to give a "best estimate". In the event a progress bar is used for the survey, this setting will then increment the progress bar an appropriate distance while the loop question is being answered. In the event you must give a "best estimate", the progress bar movement may be a little erratic during the loop question(s).

6. Consider adding a title for the loop.
7. In the iteration items area, add the list of items you wish to ask the question(s) for.

   This could for example be a list of products where you wish to ask the same questions for each product. Note that you can use a reusable list here (see Reusable Lists on page 155 for more information), or paste the list into the area (see How to Paste a List on page 146 for more information).

8. Click the green **Inside** button and create the questions you wish to ask of the respondent inside the loop, in the order you wish them to appear to the respondent.

   Note that you can use piping to include the relevant loop iteration value in the text of the question (see Text Substitution or Response Piping on page 108 for more information). For example **Why did you choose ^f('l1')^?**

4.18.2. Code Masking in a Loop

Code masks are used to select a set of iterations for a loop. To set up a code mask:

In the Code mask field on the Loop node's Script tab, input a Jscript expression that evaluates to a set of codes. The loop member list will be filtered based on the set of codes in the Code mask field. A simpler method in Survey Designer is to use the “Dynamic answers” functionality in the “Iteration items” section for the loop. Choose **Actions > Add dynamic answers**, then from the drop-down, choose the question you want to filter “Iteration values” on. Code Mask can still be used as an alternative.

4.19. Quotas

The Quota is effectively a special type of condition (see Conditions on page 160 for more information). Within a survey, you can use Quotas to specify the number of responses you would like to receive for different sub samples or target groups, or to limit the number of responses for the overall survey. When a quota is reached for a sub-sample, the survey can be closed automatically for respondents belonging to that sub-sample by using conditions and stop nodes, while it remains open for respondents belonging to other sub-samples that have not yet been filled. In addition, Confirmit can send alerts by email to specified addresses when a quota is full

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

You can manage the quota targets via an Excel™ import/export (see Managing Quota Targets on page 180 for more information).

4.19.1. How to Create a Quota

1. In the Survey column, click on the question you wish to base the quota on, then click on the overflow menu icon for that question to open the drop-down menu.

   To create compound quotas (quotas based on more than one question), select the questions by checking their selection boxes (see Selecting Multiple Items in a Survey on page 124 for more information)

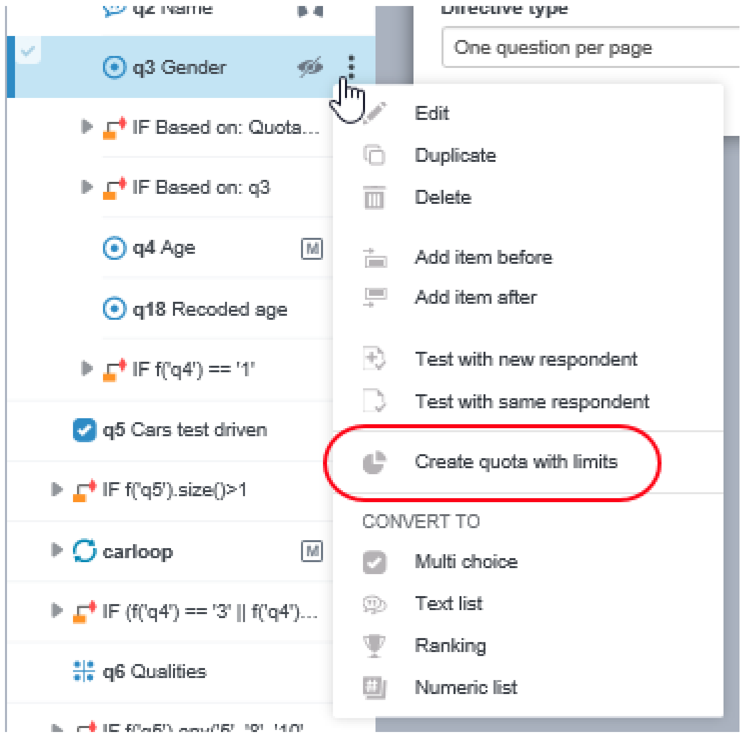


Figure 219 Creating a quota for a question

2. Click the **Create quota with limits** item.

   The Create new quota with limits overlay opens.

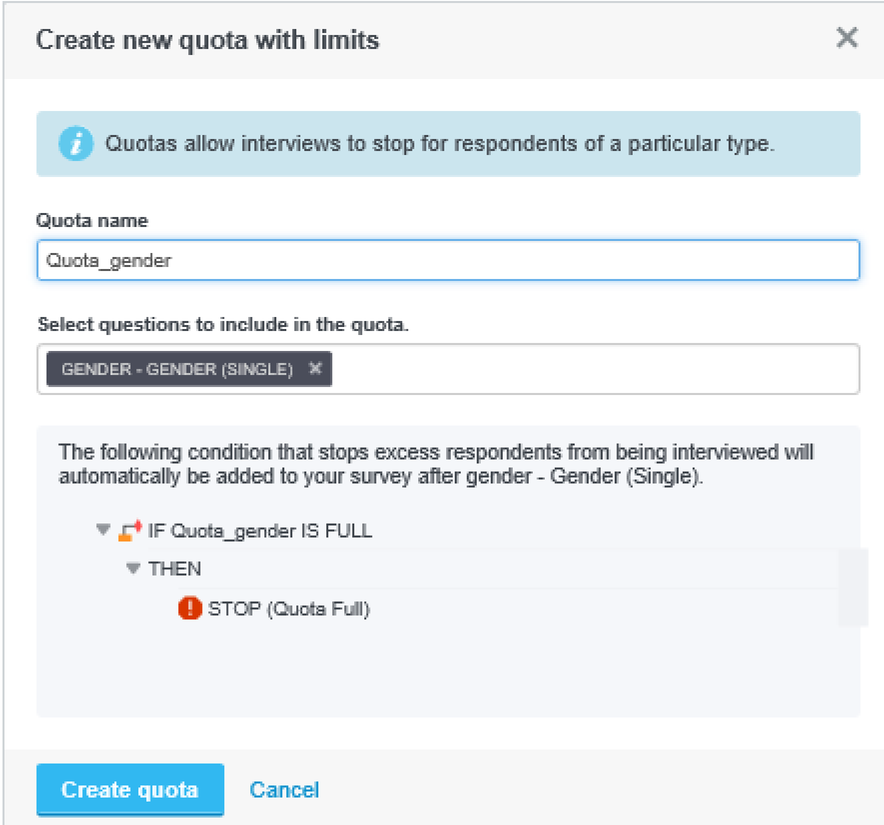


Figure 220 The Create new quota with limits overlay

A condition node that stops excess respondents from being interviewed is added automatically to your survey after the selected question.

- By default the quota will be named Quota_<questionId>. You can change this as necessary - click into the field and edit.
- By default the question you selected in step 1 will be added to the Select questions... field. You can add further questions to build up a compound quota (one based on two or more questions). To do this, click into the field and select the desired question(s). All the questions in the survey that are supported by the Quotas functionality will be listed in the selection drop-down. To remove a question, click the **X** button on the question name.

3. Click **Create Quota**.

   The quota is created and added to the Quotas folder (arrowed below), and the Quota Details page for that quota opens.

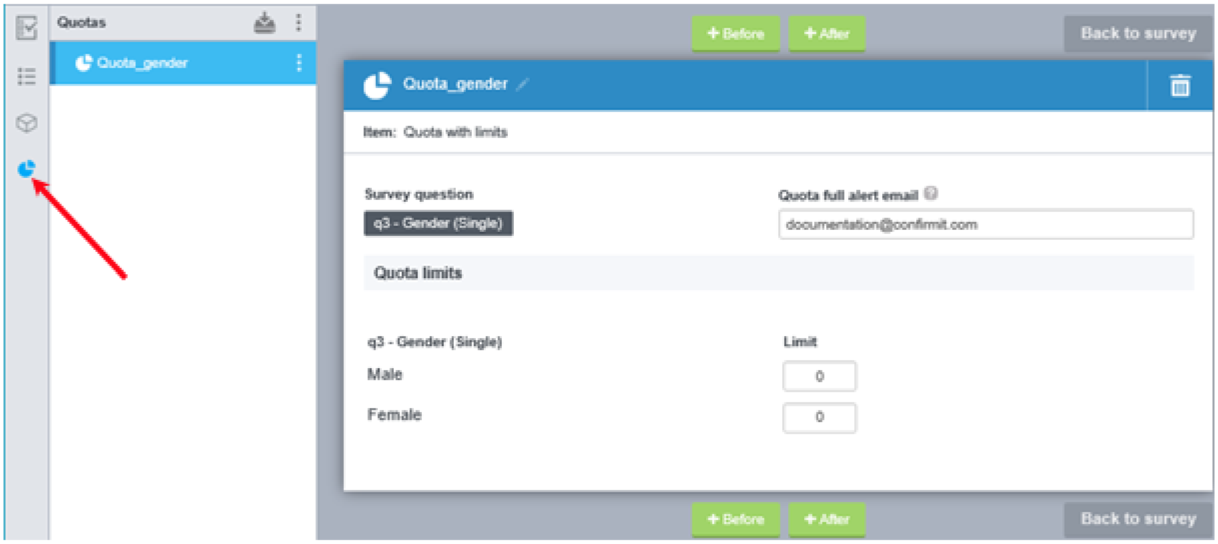


Figure 221 Example of the quota's Details page

- The Quota full alert email field shows the email address to which a notification email will be sent when the quota is full. Default is the address for the current user (you); edit this as necessary. You can send email alerts to multiple addresses; enter the addresses in the field separated by semi colon.
- Type in the limits for the various answer options. The limits you can set or select will depend on the type of question selected and the answer options available for the question.

4. On completion, click **Back to survey**.

   The quota is located in the survey column immediately after the question on which the quota is based. For compound quotas it will be located immediately after the last question in the quota.

Figure 222 The quota and the question in the Survey column

Note that the quota node in the Survey column indicates the logic that is set up; the node name states which question it is based on, and the upper-case text after the name indicates when it will be activated. In this case, if the quota for one of the answers for the gender question is full, then the survey will stop for additional respondents of the "full" gender.

4.19.2. Editing a Quota

There are two methods of editing a quota:

- Click the Quota icon to open the Quota column, then select the required quota to open its Quota Details overlay. Here you can change the "Quota full" email address and the limits.

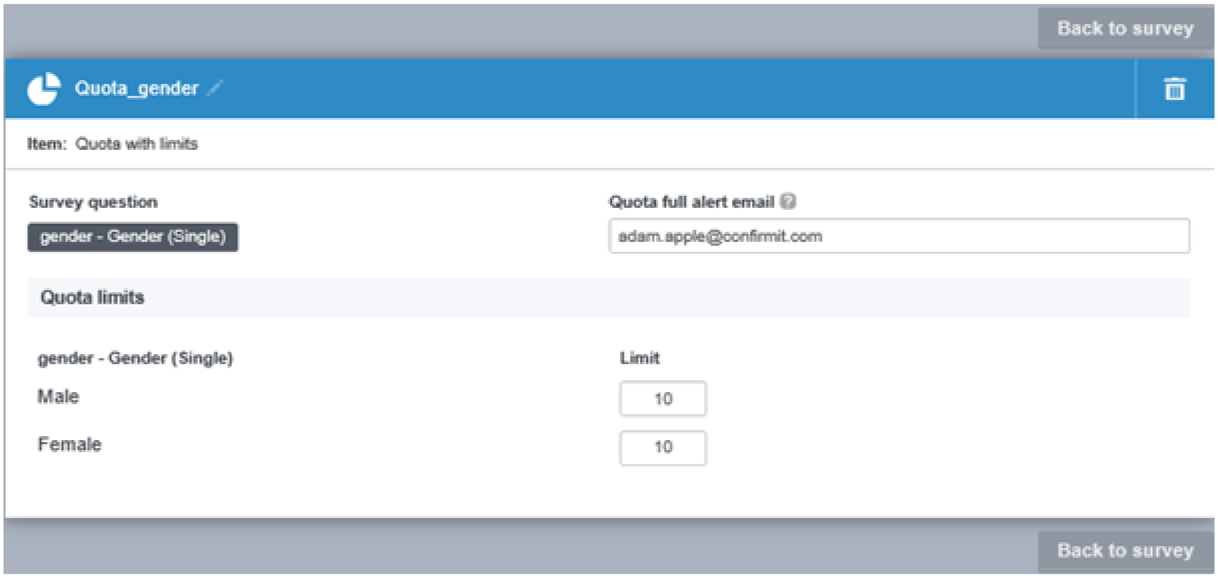


Figure 223 The Quota Details overlay

- Click on the Quota condition node in the Survey column, then click on the overflow menu icon and select **Edit**.

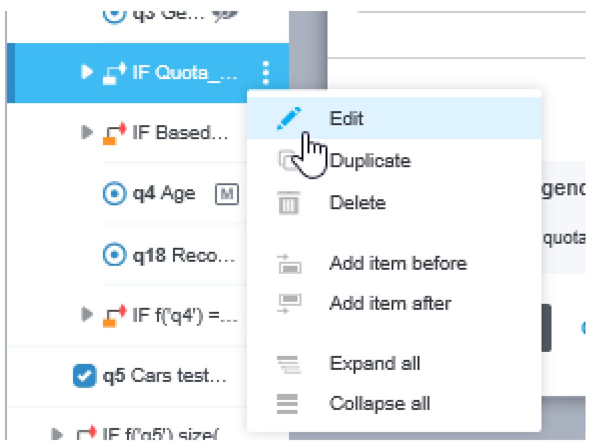


Figure 224 Opening a quota for editing

The Condition Editing overlay opens.

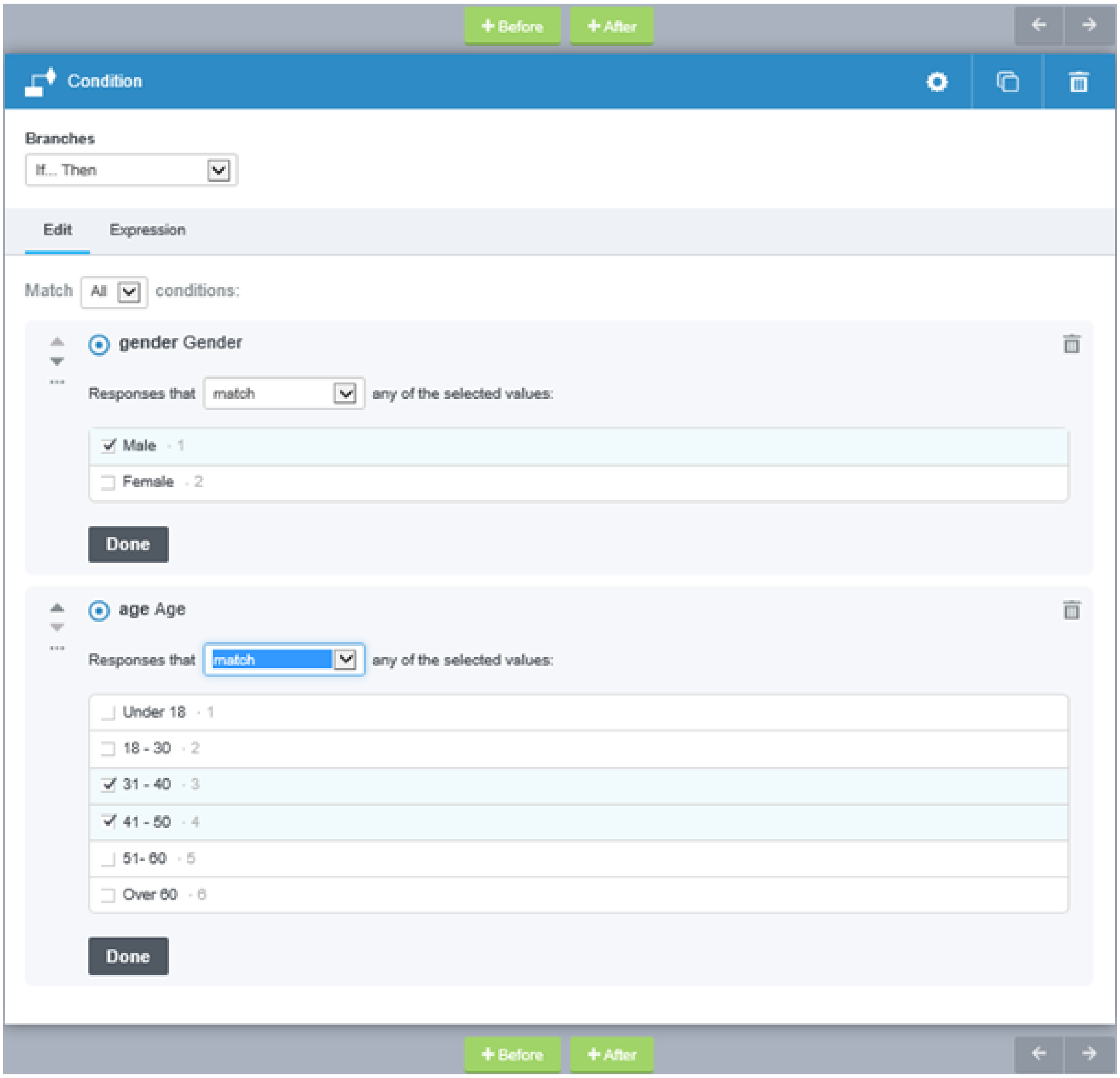


Figure 225 Example of a Condition details overlay for a quota with multiple conditions

The editing options here are similar to those available for a "normal" condition (see Conditions on page 160 for more information). Here you can add further conditions to the quota, create groups, and toggle the quota's limit trigger between the various options available depending on the question. If there is more than one condition in the quota then you can sort the order in which the conditions are processed.

4.19.3. Managing Quota Targets

You can manage quota targets by exporting a survey's quotas as an Excel™ file, editing the file, then importing the edited file back into the survey. This can be useful for defining targets for large quota lookups, and it also allows you to send the quota targets file to another person so they can define or edit values without them needing to log in to the Horizons platform. One download file is created for the survey, with each quota in the survey being presented on a separate tab in the spreadsheet. This allows you to defined or update the quota target values for any of the quotas in the survey, individually or simultaneously. This works for quotas based on singles, multi’s, grids or any combination thereof.

To use this functionality:

1. In Survey Designer, go to the Design page > Quotas list then click the **Manage survey quota targets** button.

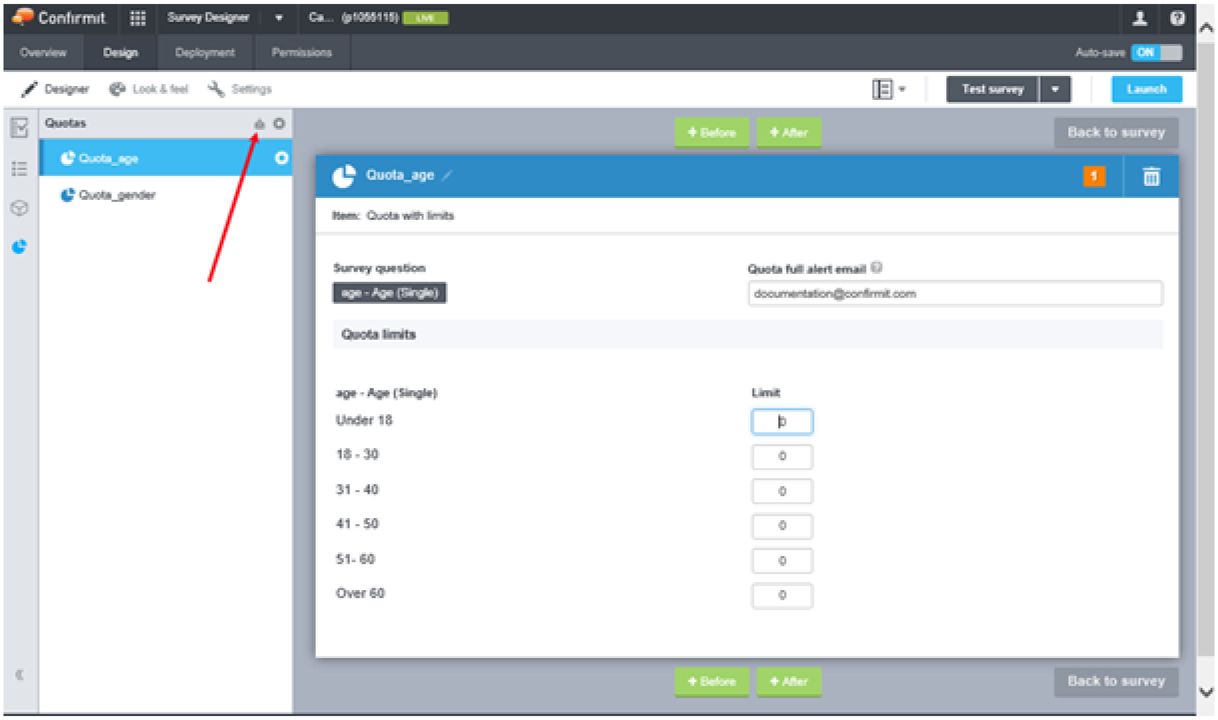


Figure 226 The Manage survey quota targets button in the Quotas list

The Manage survey quota targets overlay opens.

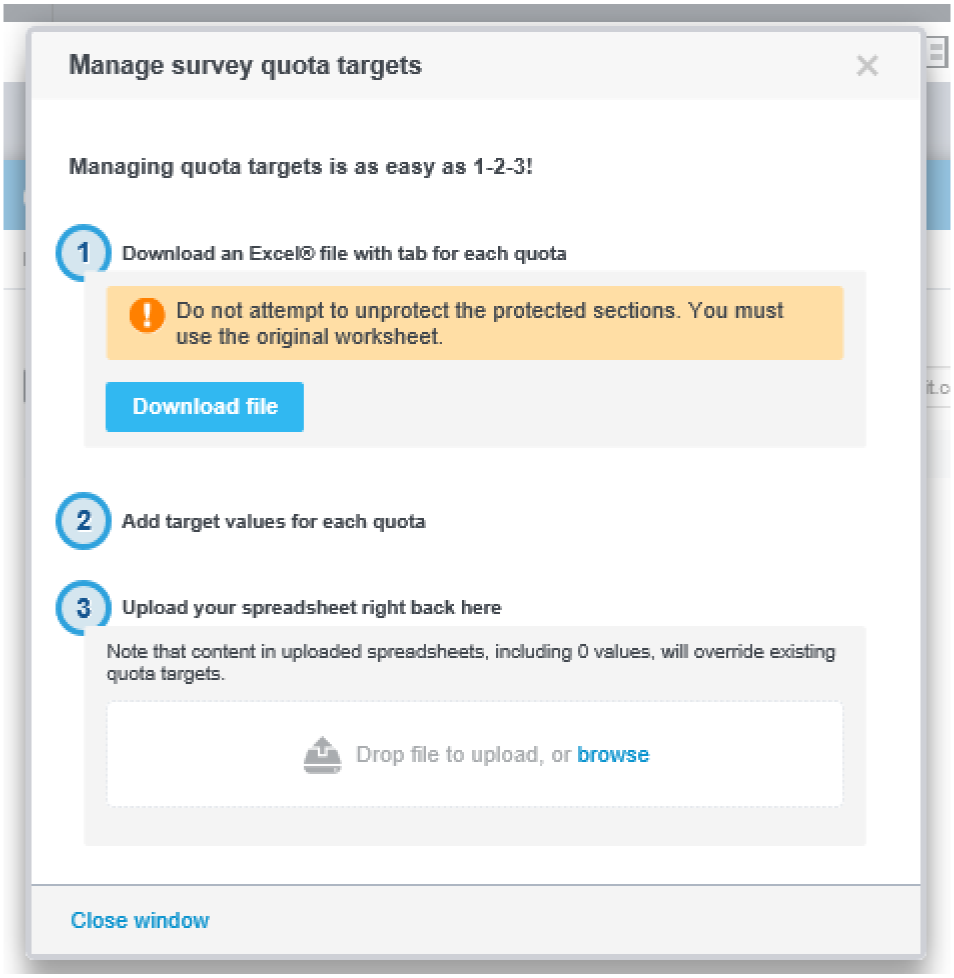


Figure 227 The Manage survey quota targets overlay

2. Click **Download file**.

   A standard Save dialog opens, allowing you to save the download file directly or select where the file is to be downloaded to.

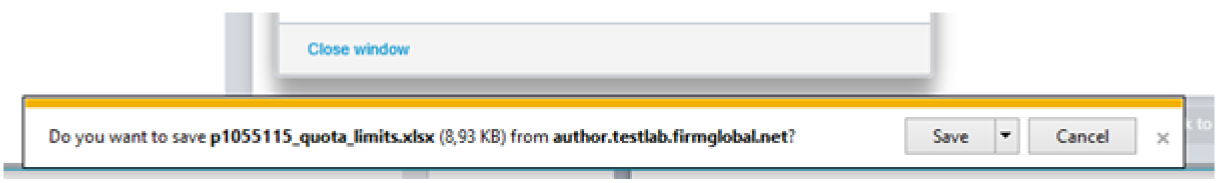


Figure 228 Example of the Save dialog for the exported file

3. Click **Save** or **Save as** as appropriate, then **Open** to open the file.

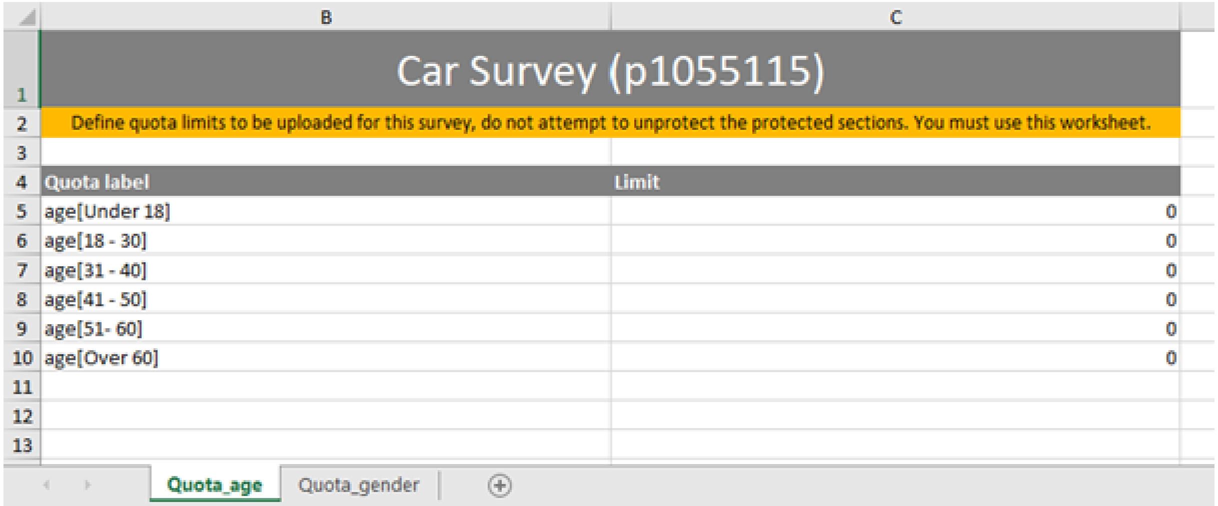


Figure 229 Example of the downloaded spreadsheet for a survey with two quotas

Note that the spreadsheet has a tab for each quota in the survey.

4. Select the tab for the quota you wish to edit, then add the required limits into the Limit column.

Note: The value cells in the Limit column are the only parts of the spreadsheet that can be edited. Do not attempt to edit any of the protected sections; doing this will cause the upload to fail.

5. Save the spreadsheet.

6. Drag the saved file from your file explorer into the upload field in the Manage survey quota targets overlay, or click **browse** (ringed below) then browse to the file and select it.

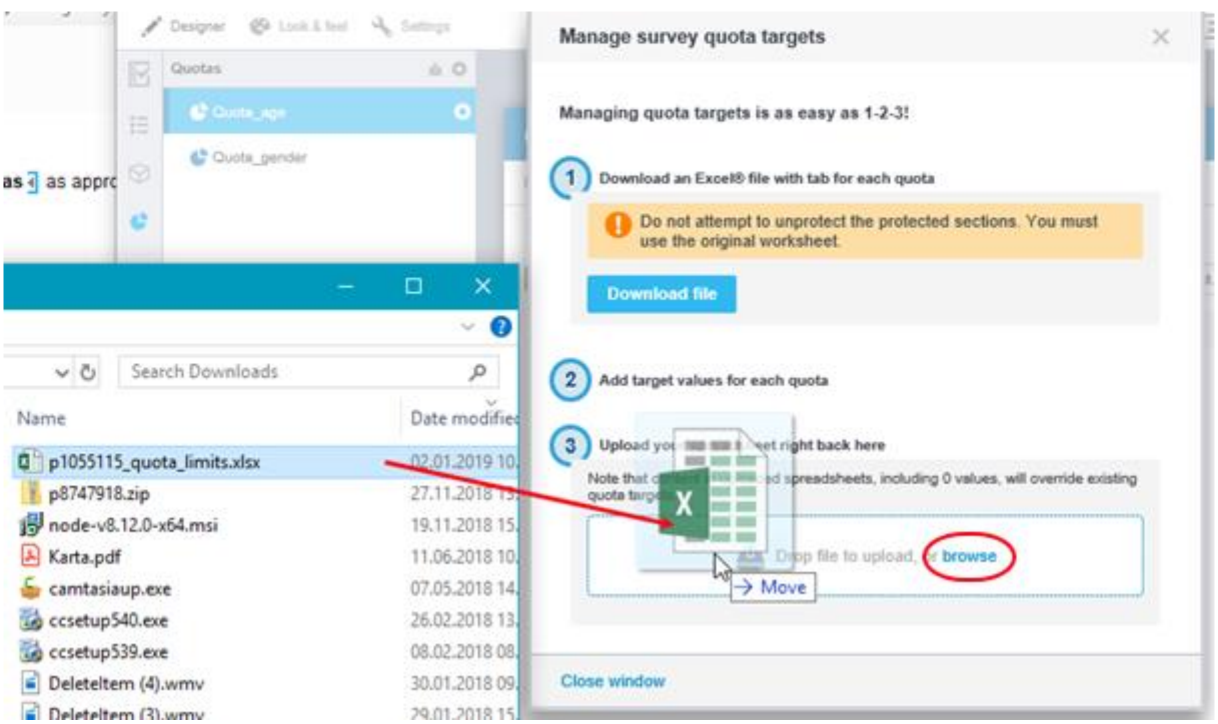


Figure 230 Dragging the edited file into the Manage survey quota targets overlay

The file is added into the field.

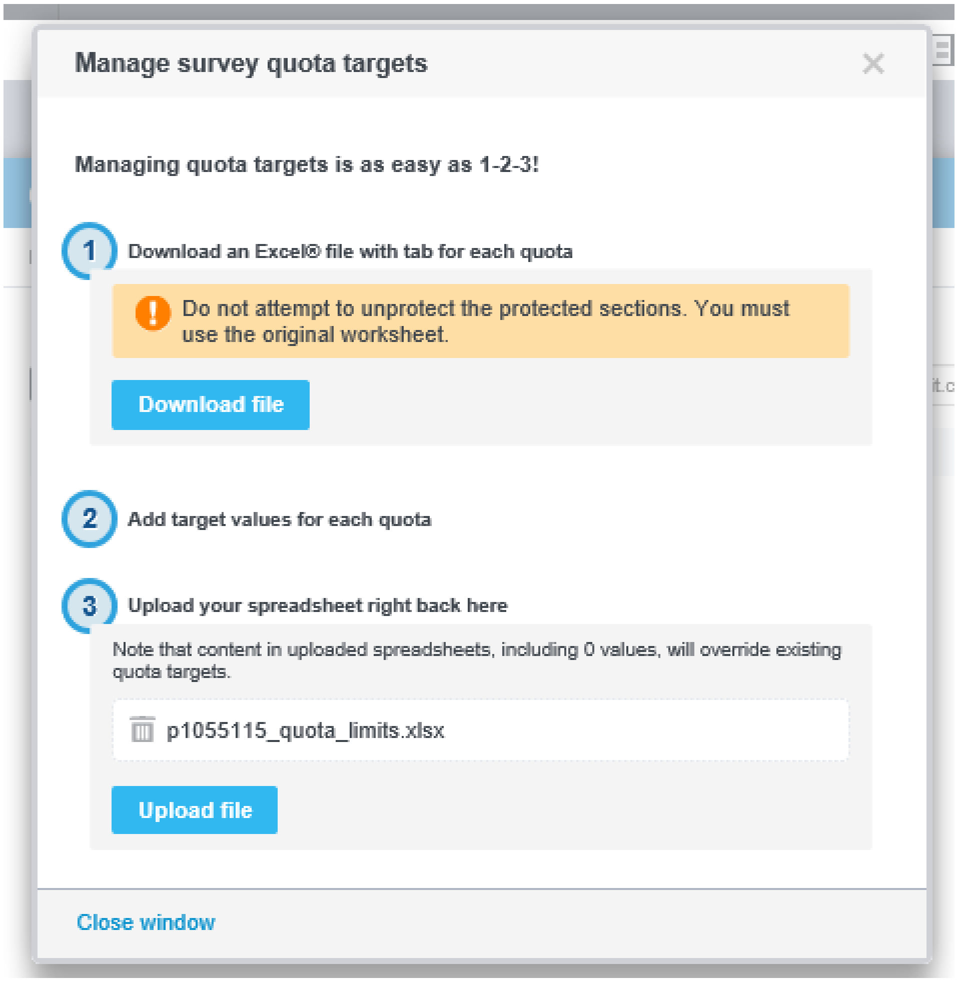


Figure 231 The edited file is added to the upload field

7. Click **Upload file**.

   The file is uploaded, and a message is presented to notify you of the result; successful or unsuccessful.

   Assuming the upload was successful you can now close the overlay. You are returned to the Design page > Quotas list, where you can check the results.

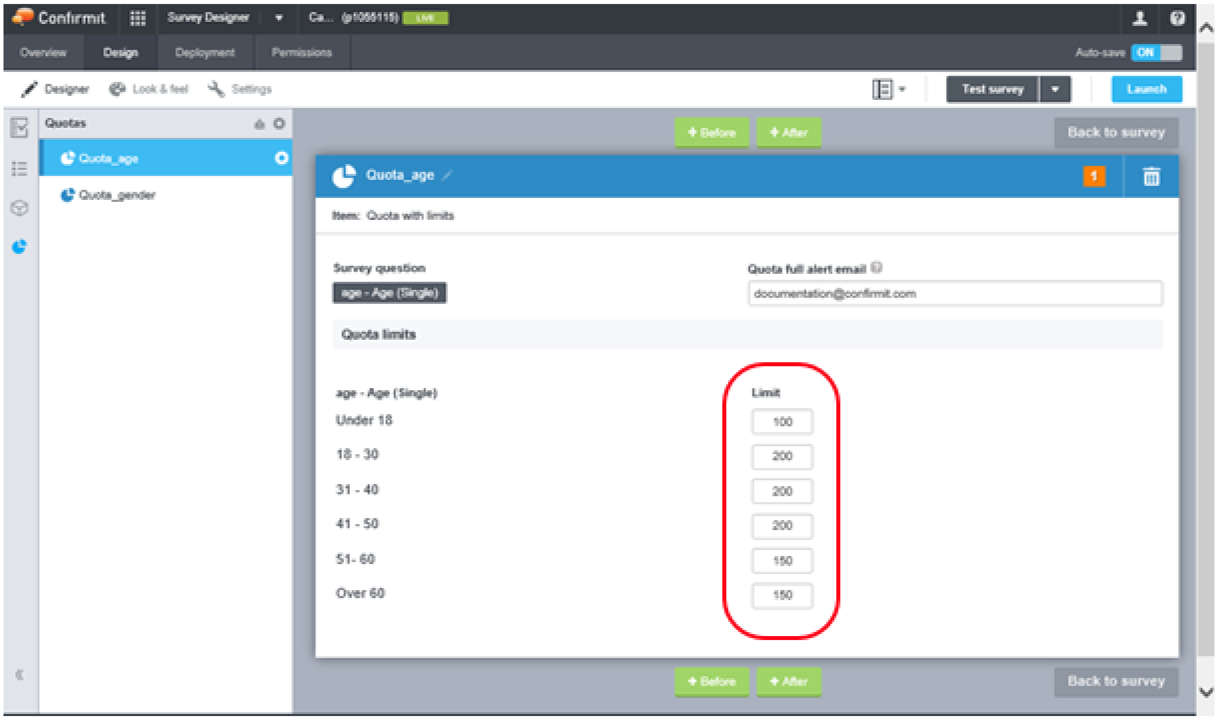


Figure 232 The quota limits are updated

5. The Look and Feel

Customize the look and feel of your surveys using Layouts. This functionality enables you to design in detail your page and question layout.

Note: Microsoft Internet Explorer does not support all the color-picker functionality.

Important
To achieve full compatibility with the various devices your respondents may be using so your surveys are always presented correctly, you are strongly advised to use only responsive layouts in your surveys **(see Responsive Rendering on page 186 for more information)****. Note that some of the functionality in Survey Designer is only supported by responsive layouts.**

To access the Look & Feel page, open the survey, go to the Design page, then click the Look & Feel tab.

5.1. Responsive Rendering

The Responsive Rendering functionality allows the survey to automatically adapt to suit the device the respondent is using to answer the survey. This allows a unified look-and-feel for a survey irrespective of the device used by the respondent, and ensures a good respondent experience on any device. So if you select to use a Responsive layout then you do not need to select the Smartphones or Generic mobiles survey modes before launching your survey.

Survey layouts that are designed to use Responsive Rendering are available, listed first in the Layout selection drop-down. You are strongly advised to select these layouts for new surveys, and change existing surveys to use them. For simplicity you are advised to use one that is close to your requirements and adapt it as necessary. In the event you wish to create your own layout, to use Responsive Rendering check the Responsive box on the layout's Permissions page. Note that Public responsive layouts are denotes by an icon in the Layout list.

A Responsive layout is 'versioned'. That means, when changes are made to the layout, the edited layout is saved as a new version. When you create a survey and select a Responsive layout, the version of the layout that you select is then locked to the survey. This is done so that surveys using an older version of the layout will not be broken by later changes to the layout.

To create a new responsive layout, refer to the Survey Layouts section in the separate Professional Authoring User Guide.

5.1.1. Responsive Rendering Functionality

The Responsive Rendering functionality adds a number of features to the layout:

- If a respondent makes an error while answering; for example he/she forgets to provide an answer to a required question and attempts to move on to the next question, then an error message is displayed. In addition, both the question involved and the actual error are highlighted. As the respondent corrects an error, the highlighting for that error is switched off. When there are no more errors to correct, the respondent can move on to the next question. The error message that is displayed can be customized.

- When a grid is rendered on a smartphone, the row text is placed above the scale to ensure the scale has as much space as possible. Any hint texts are also placed above the scale, and as the respondent scrolls down through the answer rows the hint texts will remain visible at the top of the display. When the respondent scrolls further and moves to the next question, the hint texts move up off the screen. Any non-scored answer options, such as "Not applicable", are placed below the scale.

If you have selected a Responsive layout for your survey and you try to include a feature that is not supported, then when you attempt to launch the survey the task will fail. The 'problems' will be listed in the error list and you will have to either remove the problem feature(s) from the survey or select a different survey layout. The task will also fail if you attempt to use a Responsive layout when the functionality is not switched on for your company. In this case the message "You cannot use this layout" will be presented.

3D-Grid Functionality

3D-grids are supported for the Classic and the Whitespace layouts. Note that 3D-grids that include Ranking questions, or that include an auto-sum, are not supported.

If the 3D-grid is large, then in desktop rendering scroll-bars will be provided. However, you should bear in mind when designing your 3D-grid that when it is displayed on a mobile device, the questions in the grid are separated out to be their individual component question types. The threshold for when rendering changes from desktop to mobile can be edited for some responsive layouts (see The Layouts, Themes & Colors Page on page 187 for more information).

5.2. The Layouts, Themes & Colors Page

When in the Design page, click **Look & Feel** to open the Layouts, Themes & Colors page. Here you can select the layout to be used for your survey, and set up and adjust the images and colors used for the various items on the survey pages. Note that different layouts may have different options and properties available.

Note: If a non-responsive layout is chosen for the survey, much of the color selection functionality will not be available. You must then use custom CSS or JavaScript to define the look and feel.

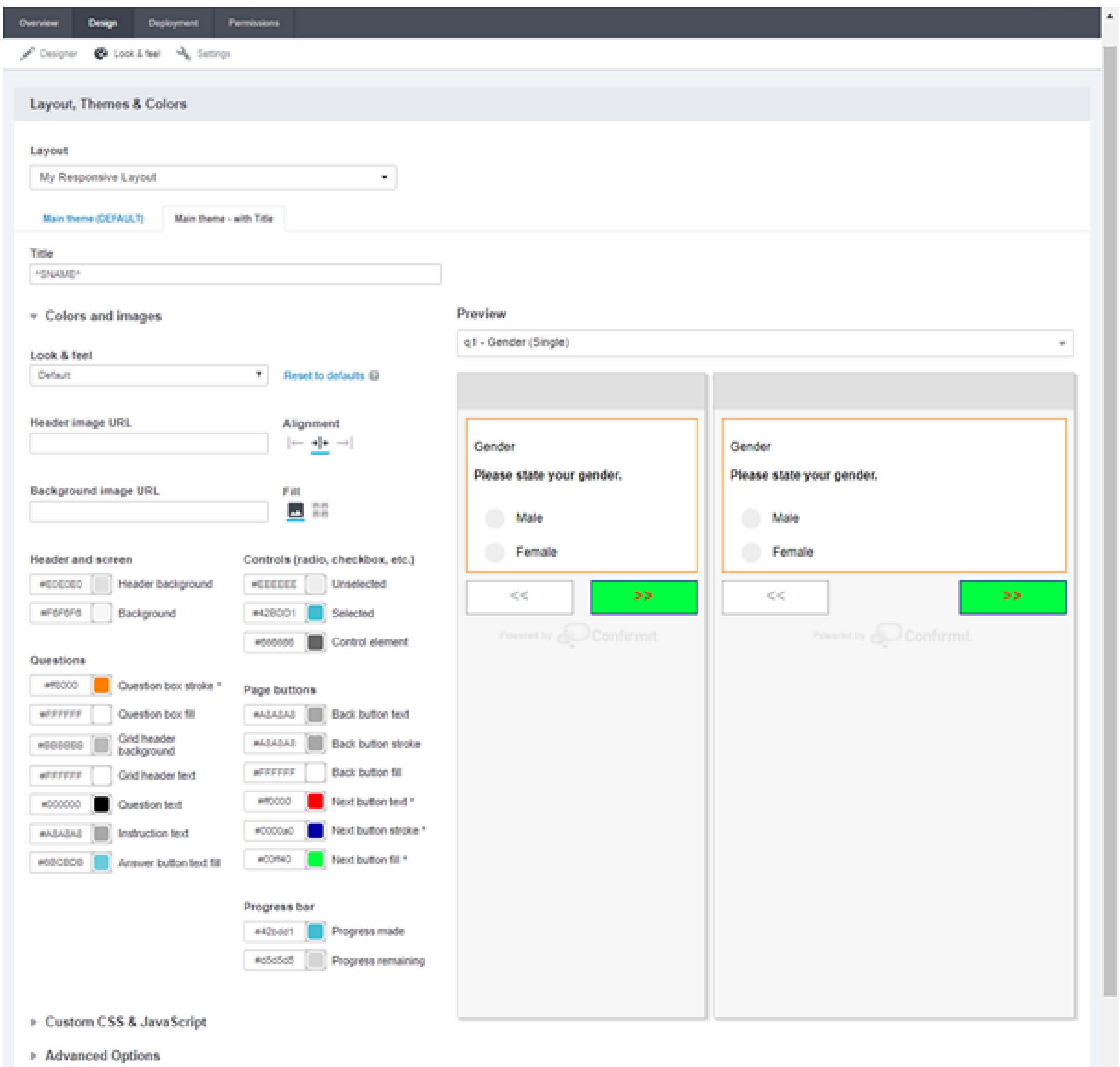


Figure 233 Example of the Layout, Themes & Colors page

You have two basic methods of choosing a color for an item,

1. You can type any valid RGB (Red, Green, Blue) value into the color code field for the property, for example #FFFFFF. Remember to include the '#' symbol in front of the code when using RGB color codes. The color is added to the sample patch beside the field and is applied to the property.
2. You can open the color picker and select a color from there (see The Color Picker on page 189 for more information).

Any properties that have been changed from the default values will be indicated with an asterisk (*) by the property name.

The properties are:

- **Layout** - the currently selected layout. Click into the field to open a drop-down list of all the layouts available to you (see Survey Layouts on page 62 for more information).
- **Title -** enter a text that you wish to display in the title bar of the survey browser. The field also supports the ^SNAME^ primitive should you wish to show the survey name in the title bar.

Note: The properties under Colors and images are only available for responsive layouts.

- **Look & feel -** select the "look & feel" you wish to use for your survey from the list available. The color and image selection functionality available to you will vary depending on the look & feel you select.
- **Reset to default -** click this to remove all changes you have made to the layout and reset it to the default settings.
- **Header image URL -** here you can type or copy in the URL to an image that you wish to use as the background for the header area on the survey pages.
    - **Alignment -** select where in the header row you wish the image to be located. The options are Left, Center or Right.
- **Background image URL -** here you can type or copy in the URL to an image that you wish to use as the background for the survey pages.
    - **Fill -** you can select to show the image just once on a page, or you can select to have the image repeated to fill the entire page.
- **Header and screen -** set the background colors to be used for the header area and the screen (not the question background color).
- **Controls -** set the colors to be used for the various buttons, check-boxes etc. that the respondent will use to reply to the survey.
- **Questions -** set the colors to be used for the various lines, areas and texts used in the questions.
- **Page buttons -** set the colors to be used for the backgrounds and texts for the Back and Next buttons used to control the pages in the survey.
- **Progress bar -** set the colors to be used for the "completed" and "remaining" parts of the progress bar.
- **Preview -** choose from the drop-down the question you wish to use as the preview, to see how the question will look to the respondent when it is presented using the colors and images you have selected. The preview on the left shows how the question will look when viewed using a smartphone; the preview on the right shows the question as it will look on a larger format device such as a laptop.
- **Custom CSS & JavaScript -** click to open two fields. Here you can add custom style sheet code to override the page styling, and JavaScript that will be run when the page is ready for use by a client script (see Custom CSS and JavaScript on page 190 for more information).
- **Advanced Options -** click to open two fields. Here you can add the URL to an external style sheet, and the URL of a file (typically a .js file) that should be included in the survey (see Advanced Options on page 190 for more information).

Some responsive layouts (for example the Whitespace layout) have the Mobile threshold property available. Here you can specify the width of the users device display in pixels below which the survey will be presented in mobile rendering. Default is 640px. At this point, some question types are rendered differently; for example a multi-grid is rendered as regular multis, a 3D-grid is rendered as its component parts and a grid appears as individual questions. If you wish to have different switch points for different parts of the survey, you can create identical layouts with just the threshold set differently, then apply the appropriate layout to the appropriate part of the survey.

Note: The Whitespace layout is under development, and properties and markup may be changed. This should not effect most users, however advanced users who have performed heavy customization to the markup may be effected in some cases; upgrades to the code may require that customizations need to be re-built.

5.2.1. The Color Picker

To open the color picker overlay, click into a color sample patch in the Layout, Themes & Colors page.

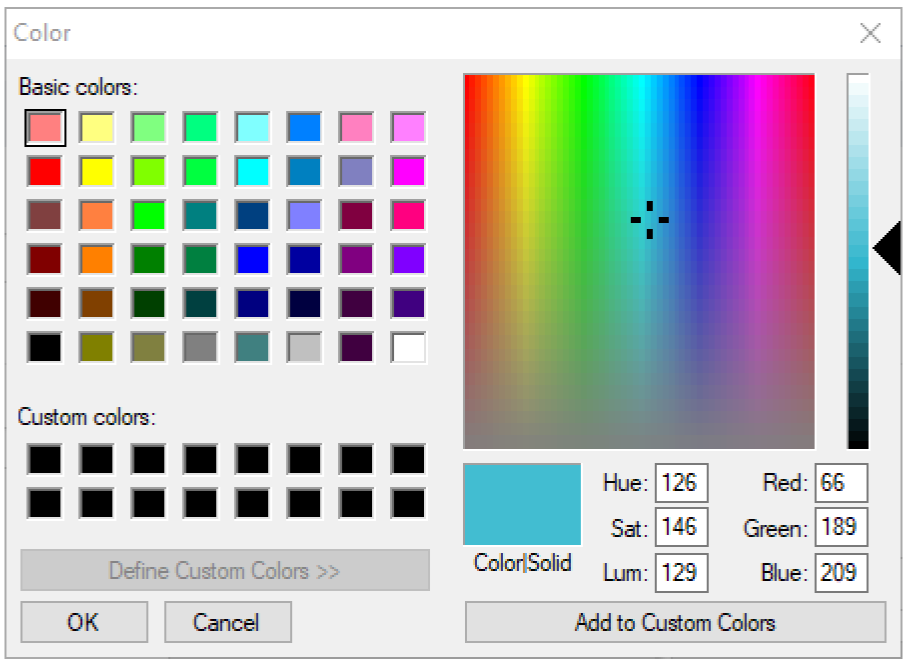


Figure 234 The color picker

There are several ways of creating and selecting colors for the various items in the layout:

- Click on one of the Basic colors in the selection table to the left.
- Use the slider on the main area to find the basic color. Here you can drag the slider or just move your mouse pointer to the color and click.
- Once you have the basic color, you can then move the < slider on the right side of the picker to select luminescence for that color. A sample patch of the color as it is currently specified, and the numerical values for that color, are displayed below the main area.

Note that as you change the color and luminescence, the values of hue, saturation, luminescence and the three primary colors below the main area change to indicate your current selection. If you know the numerical values of the color you want to use then you can type these into the fields directly. The hue, saturation and luminescence values run from 0 to 240, while the color values run from 0 to 255.

If you want to use the same colors for several items in your layout, you can save the colors as Custom Colors. To do this, click on a sample patch under Custom Colors to select that patch, create the color you wish to save, then click the **Add to Custom Colors** button. The color will be saved in the selected patch in the Custom Colors table. When you open the color picker for a different item, the custom colors you have previously created will then be available to you; merely click on the appropriate custom color patch to select that color for the current item.

5.3. Custom CSS and JavaScript

In the Layouts, Themes & Colors page (see The Layouts, Themes & Colors Page on page 187 for more information), click **Custom CSS & JavaScript** to open two fields. Here you can add custom style sheet code to override the page styling, and JavaScript that will be run when the page is ready for use by a client script.

Note: If a non-responsive layout is chosen for the survey, much of the color selection functionality will not be available. You must then use custom CSS or JavaScript to define the look and feel.

5.4. Advanced Options

In the Layouts, Themes & Colors page (see The Layouts, Themes & Colors Page on page 187 for more information), click **Advanced Options** to open two fields. Here you can add the URL to an external style sheet and the URL of a file (typically a .js file) that should be included in the survey.

6. Recoding Data

There may come a time when your survey includes a question with many answer alternatives, that you wish to simplify for your report. For example, you could have a Single question where you have asked the respondent to state their age. The answer options for the question could be the age groups "Under 18", "18 to 30", "31 to 40", "41 to 50" etc, but for the report you may wish to have just two age groups; "Up to 40" and "Over 40".

Regrouping the answers is called Recoding. You can achieve this by adding a special question to the survey, then taking the replies from the original question and collecting the answers into the required groups. This special question will be hidden from the respondent.

Note: Grid and 3D-Grid questions cannot be set to “Recoded Variable”. However, you can recode Grid data if you set up a question as a recoded variable and then recode the Grid question data into that recoded variable.

6.1. How to Recode a Question

This topic contains a step-by-step example of how you recode a Single question using the Expression Builder functionality. The procedure for other types of questions is the same, though the functions available in the Expression column may differ.

In this worked example, assume you have the following answers in your Age question:

Under 18 (code 1)

18 to 30 (code 2)

31 to 40 (code 3)

41 to 50 (code 4)

51 to 60 (code 5)

Over 60 (code 6)

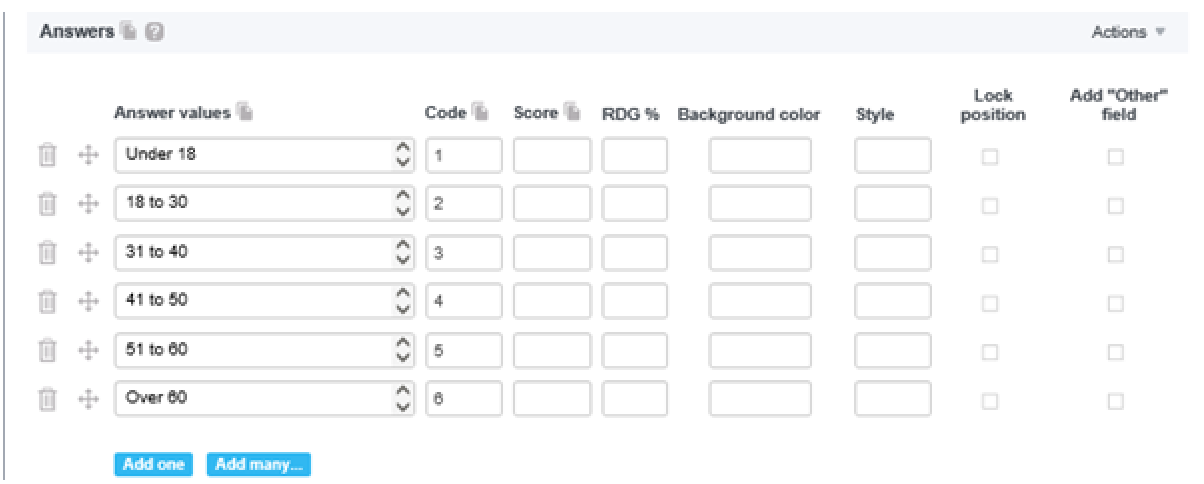


Figure 235 The original answers

And you would like to recode these to "Up to 40" (codes 1, 2 and 3) and "Over 40" (codes 4, 5 and 6).

To recode the question:

1. Open the survey containing the question you wish to recode.
2. Add a Single question to the survey after the question you wish to recode, and give the new question a logical name.

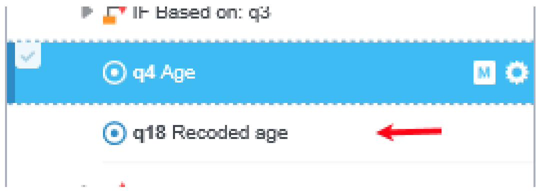


Figure 236 The new "Recoding" question

3. For the recoding question, add the answer alternatives **Up to 40** and **Over 40** and set the Type field to **Recoded**.

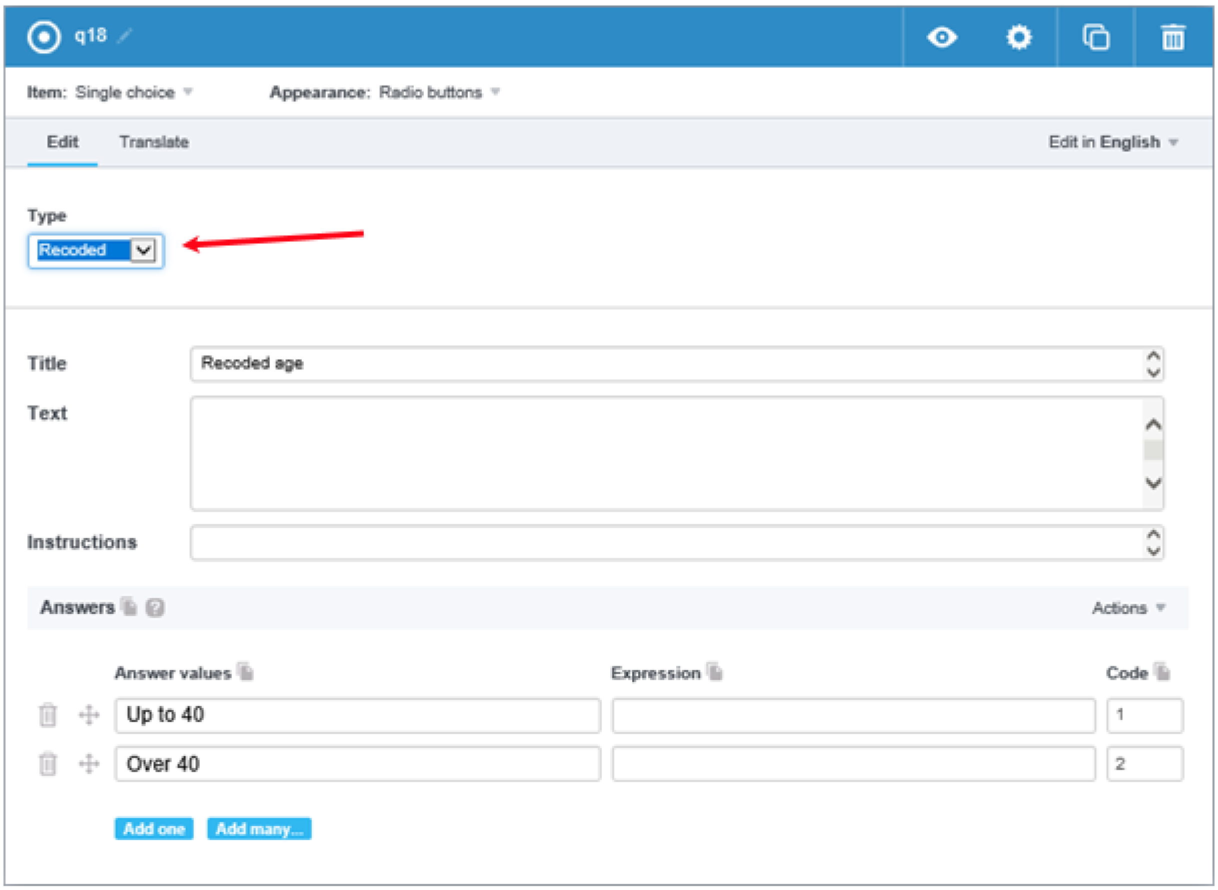


Figure 237 The question details page for the recoding question

Note that when you set Type to Recoded, the Question details page changes; the options and properties change, and in the Answers list several of the columns are removed and the Expression column appears.

You must now add expressions to the fields in the Expression column. These expressions must be programmed as Boolean, evaluating to true or false.

Tip!
When basing a variable on another specific question, you can use the Expression Builder to assist you with creating the expressions.

You now have several options for creating the expressions:

- For "Up to 40" you can say "if age is code 1 or if age is code 2 or if age is code 3", and then do the same thing for "Over 40" using codes 4, 5 and 6.
- For "Up to 40" you can say "if age is less than or equal to code 3" and for "Over 40", "if age is greater than or equal to code 4".

5. Click in the Expression field for the first recoded answer and type in the script to accumulate the first three answers.

Figure 238 Adding the first expression

6. Create the expression for the "Over 40" answer in the same way.

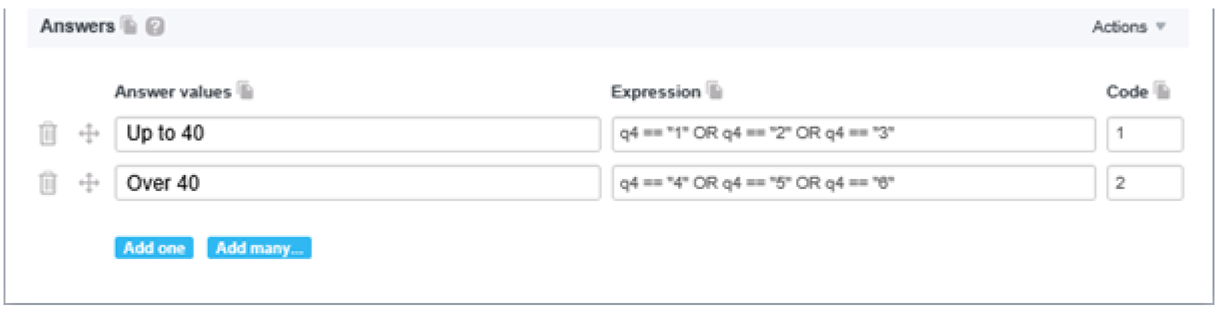


Figure 239 The result

After you have launched the survey, the Recoded question will be available for use in your reports.

7. Testing the Survey

You can test your survey without having to generate a database, allowing you to perform manual tests while avoiding time-consuming database generations. Using the **Test survey** button in the toolbar, you start the test at the beginning of the survey. However once the test system in running you can jump to any question by clicking on the desired question or node in the Survey column.

In the upper-right corner of the Designer page click the **Test survey** down-arrow to open a menu of options.

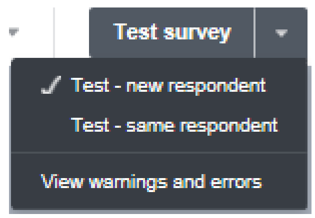


Figure 240 The Test Survey options

- **Test - new respondent -** this mode clears any answers you may already have added to the survey in previous tests, and runs the survey.
- **Test - same respondent -** if you have already run a test and then perhaps made some changes to a question, using this test mode means any answers you have already added to the survey are remembered. You will then be able to move quickly through the survey to the question you wish to view, without having to add all the answers again.
- **View warnings and errors -** in the event errors are found when the test is run, these will be listed on a Warnings and Errors page until the errors are rectified. Select this option to view the list, and click on an error in the list to go to the question containing the error. You can later reopen the list by selecting this option. Note that the error list will be updated automatically; when you rectify an error, that error will be removed from the list.

When you select **Test - new respondent** or **Test - same respondent**, the survey loads and opens at the first question in the main area of the screen as the respondent would see it. Note that the survey column changes color to pale blue to indicate you are in the Test mode.

Note also that the system will remember which test mode you last used for this survey. For example, if the last time you tested this survey you used **Test - same respondent**, then the next time you click the **Test survey** button the test system will open in this mode. If you wish to use the other mode then you must change the mode using the drop-down menu.

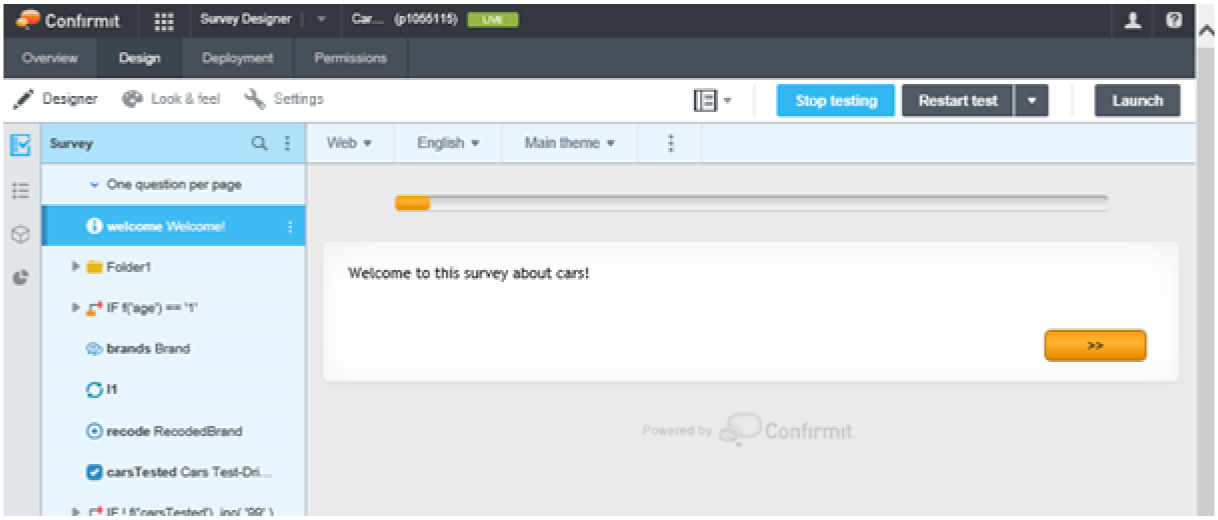


Figure 241 Testing the survey

You can now work through the survey, moving backwards and forwards depending on your Survey settings in the same way as with a live survey. You can also click on questions in the Survey column to skip directly to them. When you have finished testing the survey, click **Stop testing** to close the test page and return to the Designer page.

7.1. Testing Only a Specific Question

If you wish to test only a specific question, in the Survey column move the pointer over the desired item and click its overflow icon to open the drop-down menu.

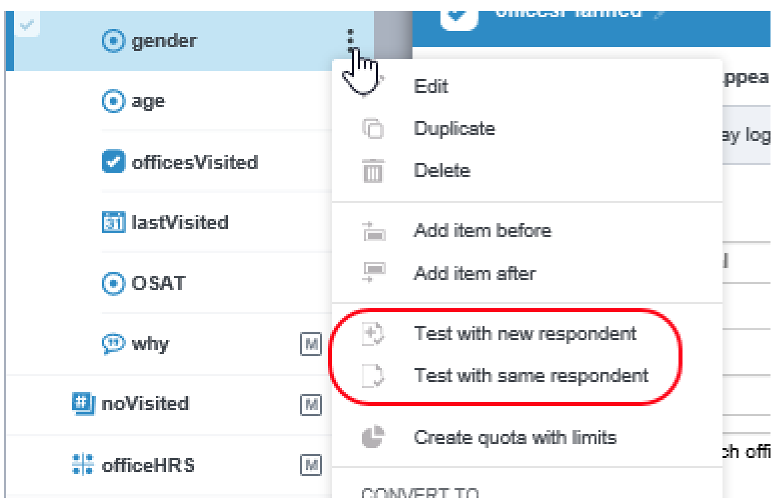


Figure 242 A survey item’s overflow menu

The **Test with new respondent** and **Test with same respondent** options open the test functionality at the selected question. Once the test functionality is running, you can move through the survey as a respondent will be able to.

7.2. Testing with Different Settings

In the event you have selected more than one rendering mode in the **Overview > Settings** area (see The Settings Area on page 29 for more information), you can change the display mode for the survey test. You can then see how the survey will look to respondents using the various modes you have selected. To change the mode, in the Test area toolbar click the **Mode** button (in this example Web is currently selected) to open the drop-down menu, then select the desired display mode.

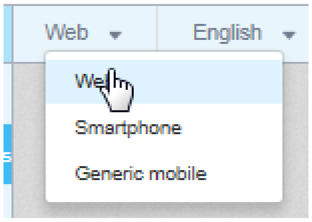


Figure 243 Selecting the rendering mode for the test

If your survey is multilingual (see The Languages Area on page 45 for more information), then you can select which language you run the test in. To change the language, in the Test area toolbar click the **Language** button (in this example English is selected) to open a drop-down menu of the languages available, then select the desired language.

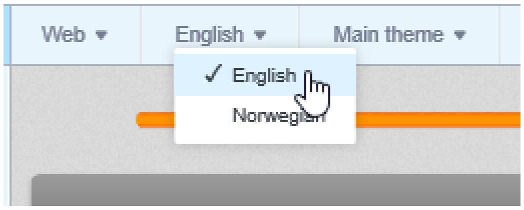


Figure 244 Selecting the language for the test

You can view your survey with or without the question titles being presented in the question header. To toggle the headers, in the Test area toolbar click the **Main Theme...** button to open a drop-down menu then select the desired option.

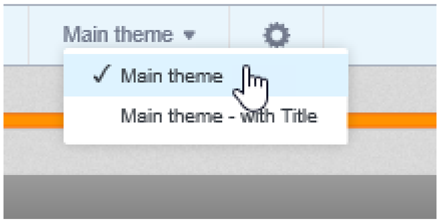


Figure 245 Selecting the theme for the test

Your selections will be remembered and applied whenever this survey is in Test mode.

7.3. The Testing Options

A number of additional options are available while testing. In the Test area toolbar click the **Options** icon to open a drop-down menu then select the desired option.

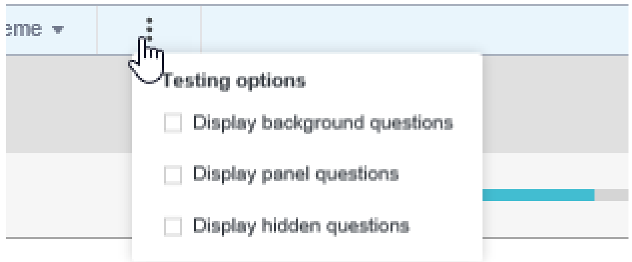


Figure 246 The test options

Here you can select whether you wish to view background questions, panel questions and/or hidden questions while you are testing. Note that these settings only apply whilst you are in the test mode; they will not have any effect on the production survey. Your selections will be remembered and applied whenever this survey is in Test mode.

8. Launching the Survey

When you have finished constructing your survey and you want to start collecting your data or perform further testing using the production database, you must first prepare the database. This process is called compilation, and is initiated by launching the survey (sometimes referred to as Deploying). Note that every time you make changes in the survey you must then update the database by re-launching.

During the launch procedure the survey is checked for errors. In the event errors are found then the launch is aborted and a list of the errors is presented (see Errors Discovered During Launching on page 206 for more information).

Initially, before the survey is launched, the status (in the top bar) indicates Design; once it has been launched the status will change to Live.

To launch the survey:

1. When in the Designer page click the **Launch** button in the upper-right corner of the page, or go to the Deployment tab.

   The Deployment page opens. Here you can select the survey modes to be used, and set and adjust the settings for the survey. Here, if necessary, you can also upload a list of respondents to whom you wish to send the survey (see Respondent Upload on page 207 for more information).

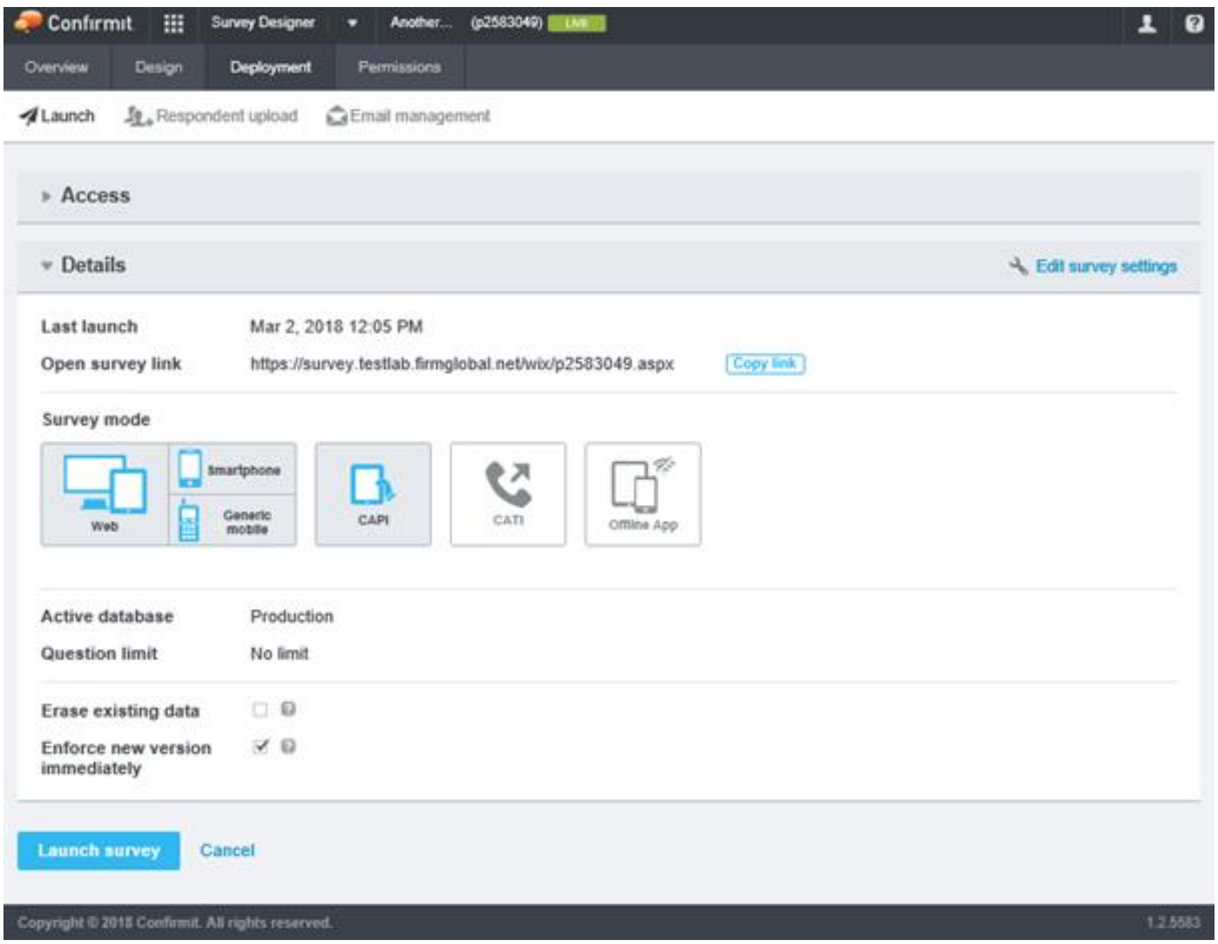


Figure 247 The Launch page for a survey

Note that if the survey has been launched previously so the databases already exist, then the status will already indicate Live (or Closed), and details of the previous launch are presented.

2. When you are ready, click **Launch survey**.

   While the survey is launching, information is provided to keep you informed of progress. This can be hidden if it is not important for you, or you can view the details if for example you wish to see if there are any problems or understand at what stage a problem occurs. Click **View log** (ringed) to toggle the details. Note that in the event warnings are presented, the log will open automatically on completion of the launch task.

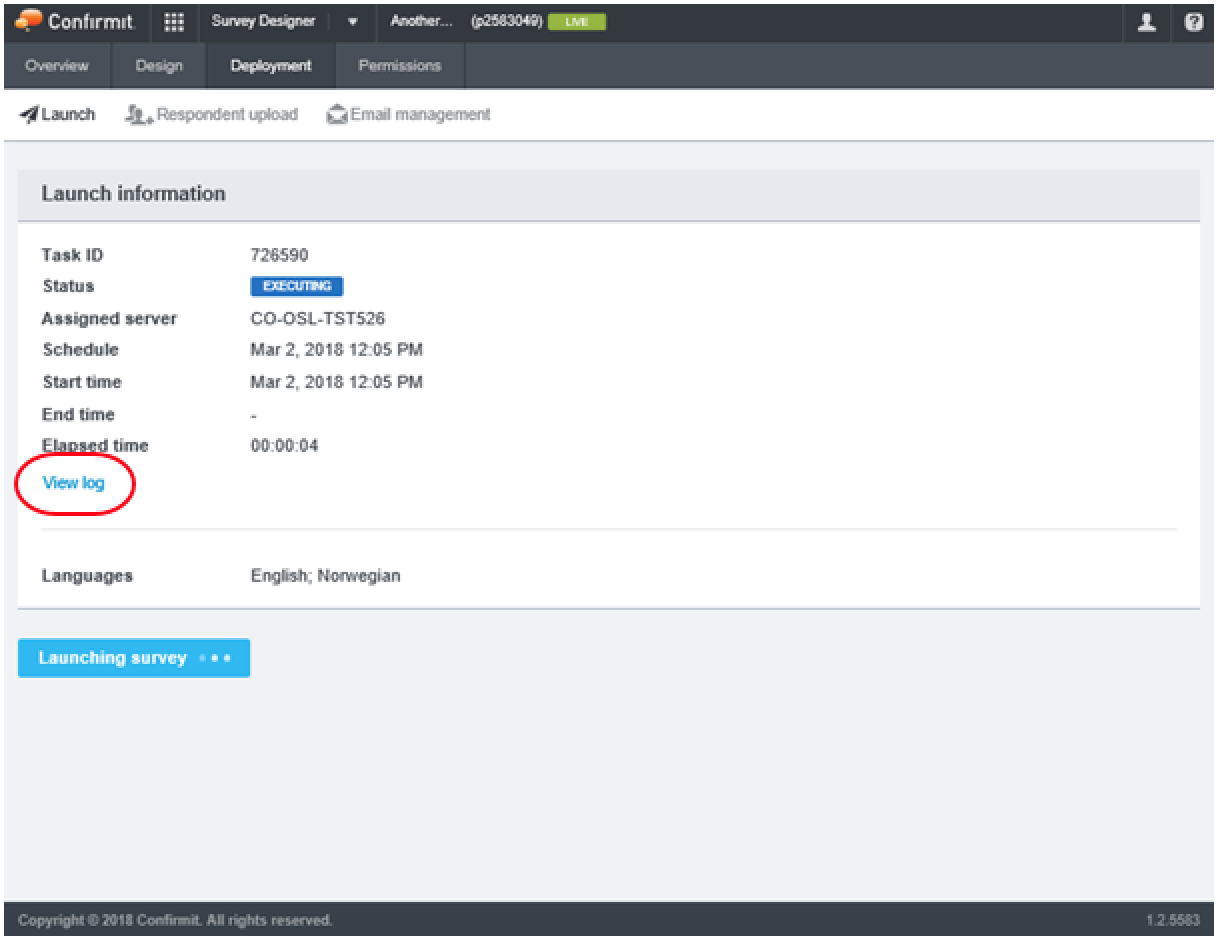


Figure 248 Launching

Note: You do not have to stay on this page while the launch task is being run; you can move around within Survey Designer. On completion of the task a message will be displayed towards the top of the Designer window to inform you of the status of the launch.

On successful completion, the task details are presented and the URL to the survey is displayed.

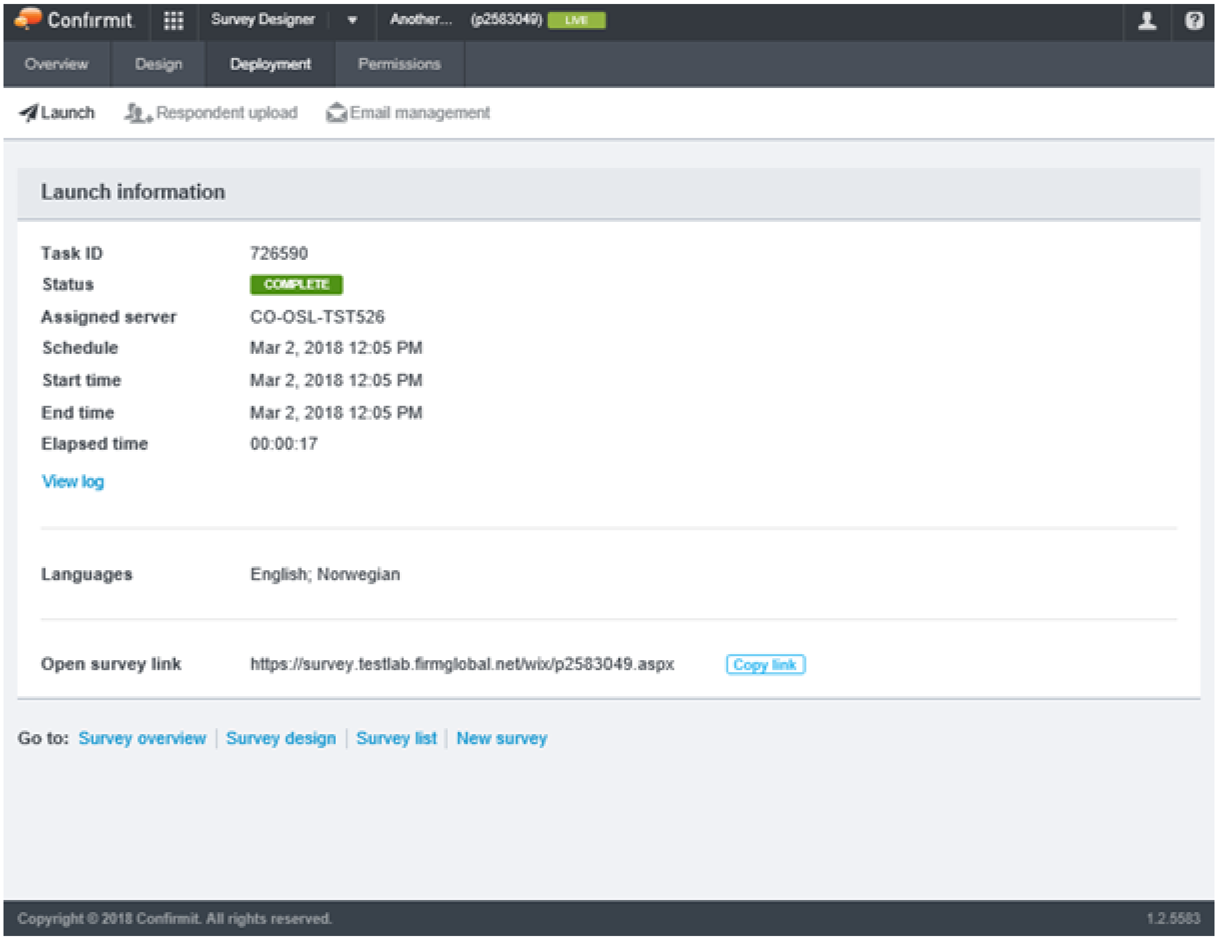


Figure 249 The Launch page on completion

Click **Copy link** to copy the URL to your clipboard. You can now open a new window in your browser and paste the URL into the address field to view the survey as a respondent will see it. Bear in mind that this will add data to your production database. If you do not want this data to be included in your results then you will need to delete it from the database, either by editing the data or by checking the **Erase existing data** option in the Launch page.

Note that after the survey has been launched, the URL is also displayed in the Details area of the of the Deployment page, and in the Deployment area of the Overview page.

Links below the URL allow you to move directly from this page to other areas of the application if desired.

8.1. The Access Area

Here you specify the type of survey (**Open** or **Restricted**) you wish to send, and select a number of other options as relevant.

Open surveys may be answered by anyone who wishes to do so. As such, they are suitable for surveys where the respondents' identities cannot be established in advance, for example Web site evaluations.

Figure 250 The Access area and options for Open surveys

The options available for open surveys are as follows:

- **Inline survey** (see The Inline Survey Options on page 203 for more information).
- **Web site intercept overlay survey** (see Web Site Intercept Overlay Survey on page 204 for more information).
- **Create database row only after first page submission -** when this setting is enabled, a new row will be created in the survey database only when a response to the first page of the survey is received.

Click **Show link options** to open some additional options - see below.

Restricted surveys can only be answered by identified respondents. A list of the respondents, including the relevant additional data such as email addresses, usernames and passwords as appropriate, must therefore be uploaded to the survey.

Figure 251 The Access area and options for Restricted surveys

The options available for restricted surveys are as follows:

- **Personalized link -** each respondent is sent a unique link that allows the respondent to access the survey. A list of respondents, with their email addresses, must be uploaded to the survey.
- **Personalized link with user name required -** this creates a survey with a login page where the respondent must enter a user name to participate. A list of respondents, with their user IDs, must be uploaded to the survey.
- **Personalized link with user name and password required -** this creates a survey with a login page where the respondent must enter a user name and a password to participate. A list of respondents, with their user IDs and passwords, must be uploaded to the survey.
- **Personalized link with single sign on -** allows respondents to participate in the survey where they are authenticated against an identity provider. A list of respondents, with their user IDs, must be uploaded to the survey. The Single Sigh On (SSO) add-on is required.
- **Externally generated links -** allows respondents to have their interview initialized by the URL that starts the interview. It is therefore not necessary to pre-load respondent data. This is only available if your company has an AES encryption key defined.

The Link options are as follows:

- **Expire link for respondent -** when this setting is enabled, a respondent's link to the survey will expire a set number of days after the initial invitation email with the link is sent. When enabled, an input field appears.**Override Domain in Survey URLs -** if you are running a survey for a customer, the customer may not want the link to the survey to include your company name (for example ...Confirmit.com). This setting allows you to use a domain other than the default in the survey links. The domain must be registered and set up to point towards the public IP address of the interviewing server(s) in the DNS domain manager.
- **Enable short URLs -** [The Short URLs functionality is an add-on. Contact Confirmit Support for details]. To avoid texts that are too long, users who wish to send survey invitations and reminders through SMS need shorter survey URLs than the standard respondent URLs used by Confirmit. When this property is enabled, the respondent URLs will be on the short format. Note that short URLs expire after six months of inactivity; either six months after a link was last accessed, or if never accessed, six months after the link was created.

Note: Due to the shorter key, short URLs are inherently less secure than full encrypted URLs. The Short URL functionality is intended to be used when there are restrictions on the length of the message, as in for example SMS messages. In all other cases you are recommended to use regular encrypted URLs.

8.1.1. The Inline Survey Options

The Inline Survey functionality allows you to embed your survey into any web page without having to use iFrames. When you select this option and launch the survey, a link is generated and presented towards the bottom of the Launch information page and on the Overview page in the Deployment area, which you can then include on the web page.

When you check the Inline Survey box, a panel of options appears.

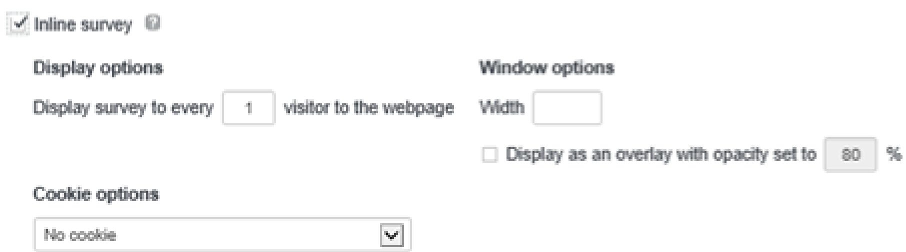


Figure 252 The options that become available when you check the Inline Survey box

The properties and fields are as follows:

- **Display options** - the survey does not have to appear to every person going to the web page - you can set the frequency at which you want the survey to appear. For example, type in 3 to have the survey appear to every third person who enters the web page.
- **Cookie options** - you can add a cookie to the survey that prevents respondents re-entering the survey within a preset time limit. Select the desired option, then set the cookie name and expiry time as appropriate.
  - **No cookie** - no cookie is added to the survey, so respondents can return to the survey if/when they wish.
  - **Prevent repeat respondents on same machine** - the cookie is "browser-specific", meaning that when this option is selected the survey cannot be reentered from the same browser on the same pc within the expiry time. The cookie will be set when the respondent reaches the status/end page.
  - **Remember respondent on same machine** - the respondent data will be remembered such that it can be changed but not entered as data from a "new" respondent.
- **Window options** - type in the desired width and height of the survey window, in pixels.
- **Display as an overlay...** - check this box if you want the survey window to be displayed as an overlay, then set the desired opacity. When the survey is presented "inline", it is displayed in front of and smaller than the viewer's current web page. In addition the background area surrounding the overlay can be shaded to indicate to the viewer that the survey page is now in focus. Overlay Opacity specifies how opaque the background area around the overlaid question is to be. A setting of 0 gives no shading; a setting of 1 makes the background area dark.

Note: A limit is imposed on the length of responses for an Inline Survey. An error message is displayed on launch if the survey includes unrestricted open text questions or questions with a field width greater than 500 characters.

Note: Inline surveys are not intended to be integrated with portals. Problems will occur in the event current responses are deleted and an attempt is then made to open another survey page.

8.1.2. Web Site Intercept Overlay Survey

When this Access mode box is checked and the survey is launched, a code snippet is created that you can copy into a web page or web template. The snippet causes a pop-up to appear to a visitor after a preset time, asking the visitor if they would like to participate in a survey. The survey could for example ask for the visitor's opinion on the web page or web site.

To activate and set up the functionality:

1. In the Deployment tab > Access mode area, check the Web Site Intercept Overlay Survey box.

   A box of Display options is presented.

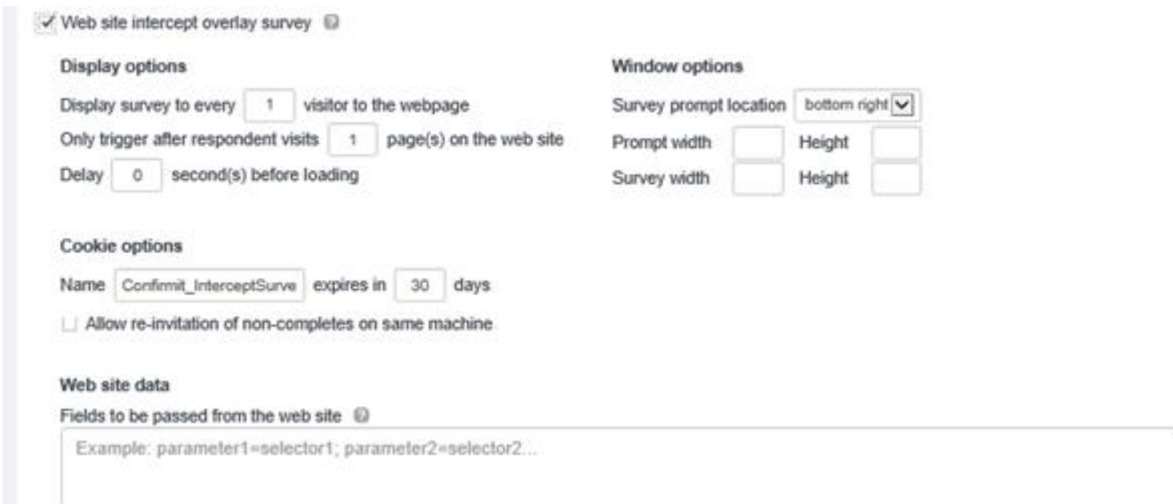


Figure 253 The Web Site Intercept Overlay Survey display options

- **Display survey to every ... -** you do not have to invite everyone who visits your website to take the survey. If you wish to invite for example every third visitor, type 3 into the box.
- **Only trigger after respondent visits ... -** you might not want to be too intrusive - wait until the visitor has viewed a few of your pages before presenting the survey invitation. Type the number of pages "delay" here.
- **Delay -** give the visitor time to see the page and form an opinion before you present him/her with the survey invitation. Type the delay in seconds here.
- **Name -** a cookie will be placed onto the respondent's pc to ensure he/she is not invited to participate in the survey every time they access your website. Type the name of the cookie and the number of days you want it to remain active here.
- **Allow re-invitation... -** if the visitor doesn't complete the survey the first time they visit your website, check the box if you want to invite them again the next time they visit. Note that if you have added a number into the Display survey to... box then the visitor must be the correct may not be in
- **Web site data -** fields you add here are passed via the querystring to the start of the survey. You can then manually move this data into the survey using a script node. Fill in querystring parameter names and css selectors, for example: parameter1=selector1; parameter2=selector2 etc. to capture the data from the web site and pass it to the survey.
- **Survey prompt location -** select where in the web page you want the prompt to appear.
- **Prompt width/height -** how large do you want the prompt to be; input the dimensions in pixels.
- **Survey width/height -** how large do you want the survey page to be; input the dimensions in pixels.

2. Make the settings as required.

On launch, an Intercept survey script is presented towards the bottom of the Launch information page and on the Overview page in the Deployment area.

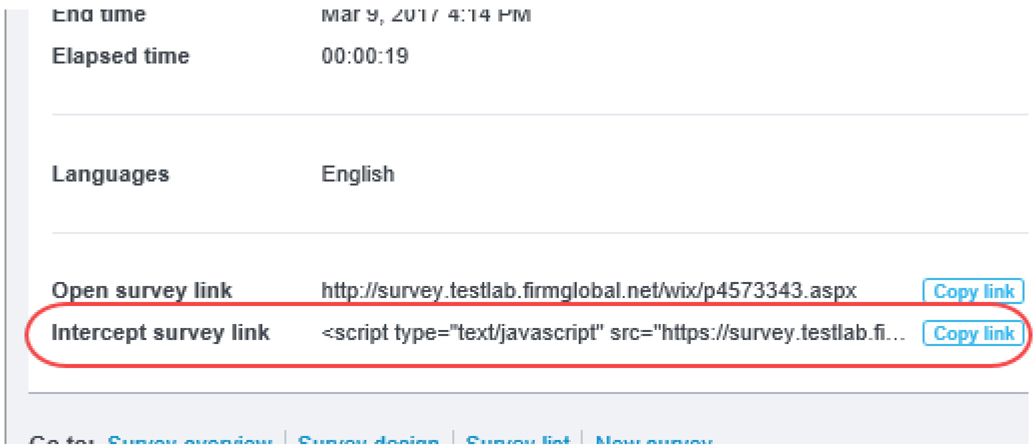


Figure 254 The resulting link on the Launch Survey page

Copy the script to your clipboard then paste it into an email that you can send to your web site manager. The web site manager can then add the script to the website template so the invitation appears to visitors as specified.

8.2. The Details Area

This area provides general information about the launch and allows you to set the survey modes to be used. If the survey has been launched before, then it will also show when it was last launched and the various URLs created.

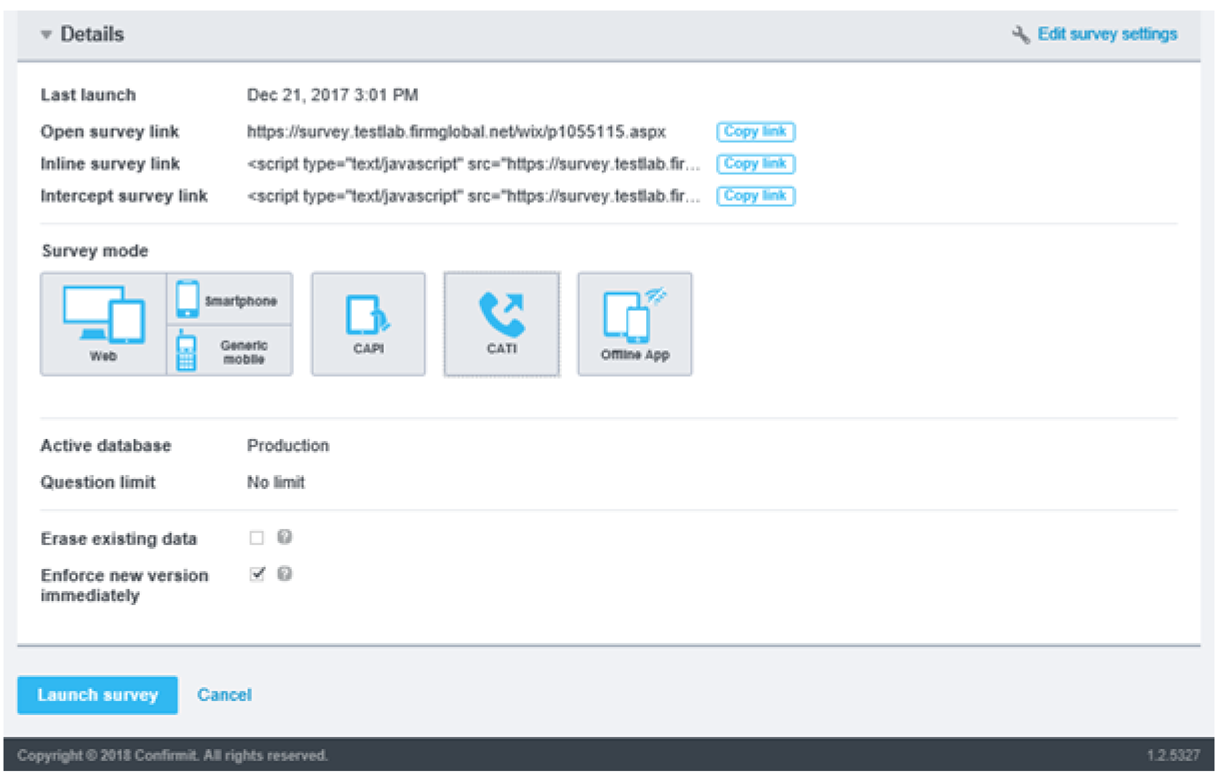


Figure 255 The Details area

Two check-box options are available:

- **Erase existing data -** check to create a new version of the database, thereby erasing all respondent, response and other data.

WARNING:
"Erase existing data" will delete the current database and create a new one, and all data in the database will be irretrievably lost. NEVER do this in a running production database.

- **Enforce new version immediately -** when checked, in-progress interviews will immediately be updated to the latest version of the survey (see Overwriting Running Interviews on page 206 for more information).

8.2.1. Overwriting Running Interviews

If you re-launch a survey while a respondent is answering it, then the respondent will normally remain in the older un-updated version of the survey until he/she leaves the survey. However in the event you wish to update the survey for all respondents immediately, for example you discover a serious fault in the survey that must be corrected as soon as possible, then you can force "open" surveys to be updated to the later version. To do this:

1. In the **Launch Options** tab, check the "Enforce new version immediately" box.

   Now when the survey is re-launched, respondents currently working in the survey will also be updated to the newer version of the survey.

If a respondent leaves the survey for any reason and later returns, then on reentry he/she will always be presented with the updated version of the survey.

Note: If you use the "Enforce new version immediately" property on a survey in which you have made extensive changes, then this may cause confusion for any respondents currently answering the survey. In addition, it may also disturb the survey logic for respondents in progress, and this in turn may reduce the quality and usefulness of the data provided by those respondents. You will need to assess the reasons for the re-launch, and possible effects, for each case individually.

Note: Only two older versions of a survey are saved. Therefore if you re-launch a live survey too often, you risk forcibly updating respondents anyway, even though you have not checked the Enforce... box. If you have to re-launch a live survey several times and do not wish to enforce the new version on any respondents who may be answering the survey, ensure you wait long enough between re-launches to allow those respondents to complete the survey.

8.3. Errors Discovered During Launching

During the launch procedure the survey is checked for errors. In the event the system finds an error in the survey, for example maybe a script is incorrect, you have forgotten to include some answers for a question or a required field width is not set, then the compilation will stop and a list of the errors will be presented towards the bottom of the window. The log is also opened.

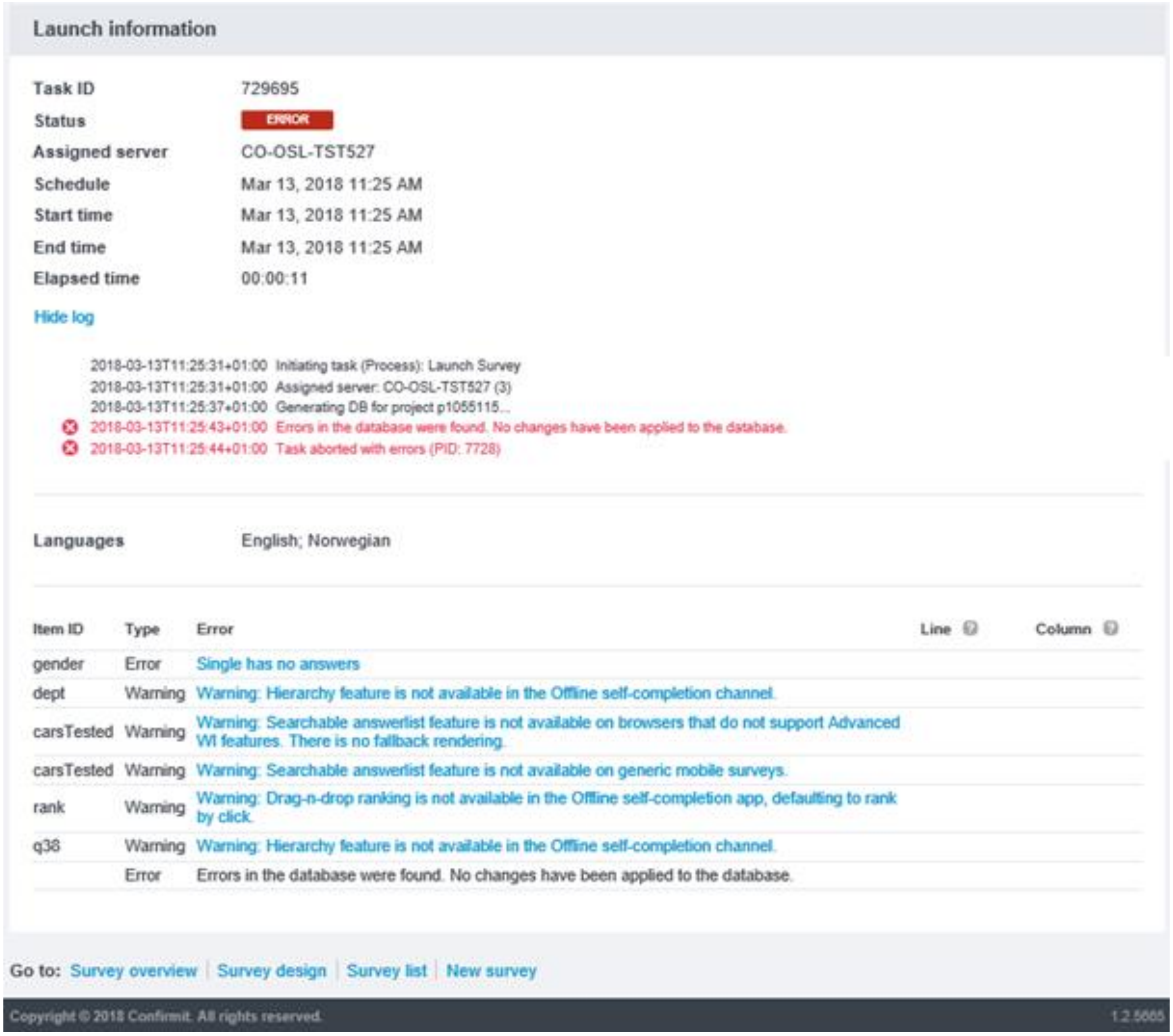


Figure 256 Example of errors found during launch

Click on an item in the list to open the question/node that contains the problem. If the error is in the text, answers etc. then the question will open at the appropriate tab. If the error is in the script, then the appropriate script field will be in focus. Once you have corrected an error it will be removed from the list. Click the browser back button to return to the list to perform further corrections.

8.4. Respondent Upload

For targeted, non-public surveys you must prepare and upload a list of the respondents to whom you wish to send the survey (see Preparing the Respondent List on page 210 for more information). If you have licensed the FTP add-on, then the option of uploading from FTP will be available to you.

To upload a respondent list:

1. In the Deployment Page, go to the Respondent Upload tab.
2. Choose whether you wish to upload a local file or upload from FTP.

Uploading a local file

1. Select **Upload a local file**.

The Upload local file overlay opens.

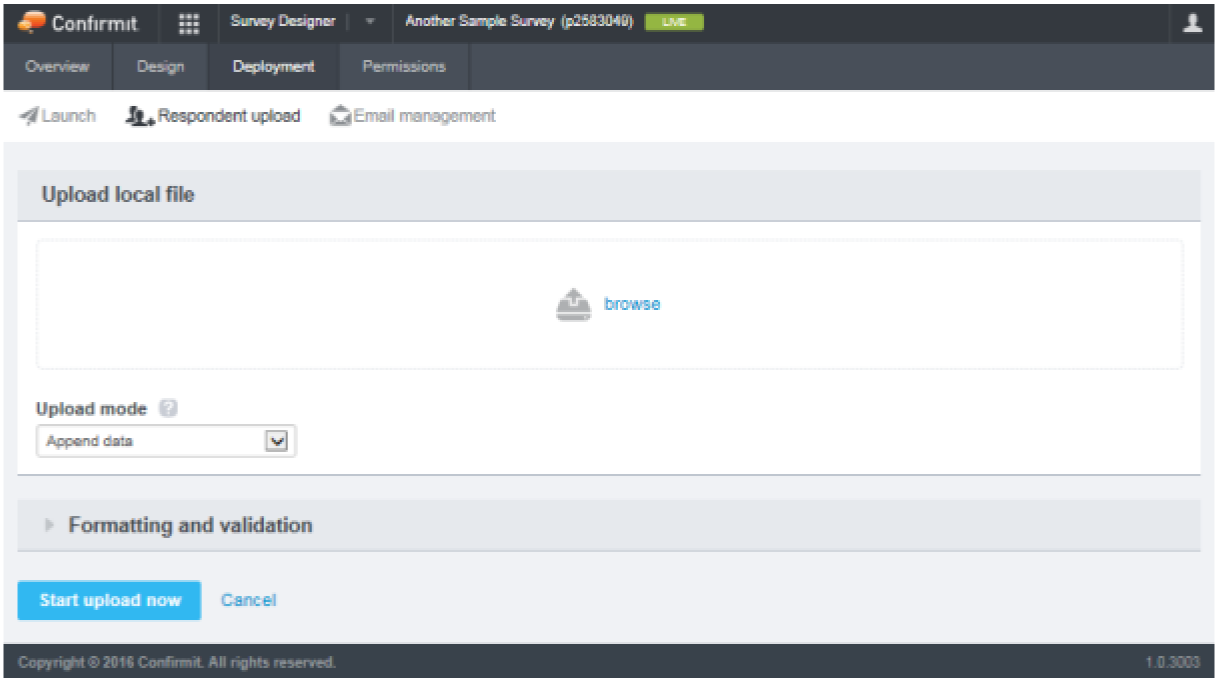


Figure 257 The Respondent Upload tab

2. Click **Browse**.

   A standard file browser/selection window opens.

3. Browse to the file you wish to upload, select it and click **Open**.

   The file name is added to the page.

4. Select the upload mode you wish to use. The options are:

   - **Append Data -** all records from the respondent list file will be added to the survey database whether or not they already exist in the database. Note that in the event records already exist in the table, these records will be duplicated. If the Validate Emails option is selected then the email addresses will be checked, and any records in the respondent file that have email addresses that already exist in the database will be ignored.
   - **Update Data -** any records in the respondent list file that already exist in the survey database will be updated with values from the uploaded file. Any records in the respondent list file that do not already exist in the database will be ignored.
   - **Merge Data -** both Append and Update modes are used - if there is no match in the key fields then the data will be added, and if there is a match then it will be updated.

5. Select any required formatting and validation (see Formatting and Validation on page 212 for more information).

6. Click **Start upload now**.

On completion of the upload a message is displayed. In the event an error is discovered in the file then the upload stops and a suitable message is displayed informing you of the problem.

Uploading from FTP

1. If the option is available to you, select **Upload from FTP**.

The Upload from FTP overlay opens.

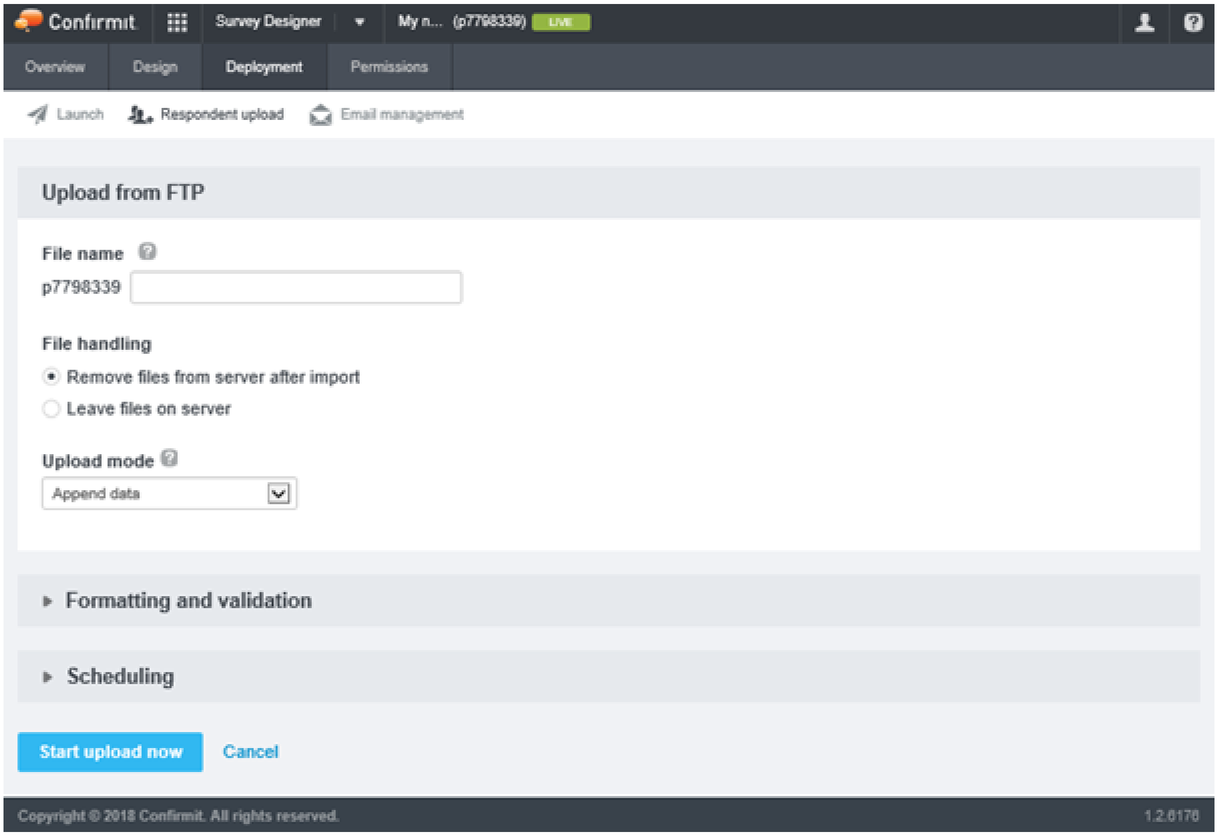


Figure 258 The Upload from FTP overlay

Files can be uploaded to \upload\ProjectsData\surveyid, where surveyid is the ID of the active survey. The file name must begin with the survey ID, and the Filename text box must contain the remaining part of the file name. Note that you can set up the task to run in the future even if the file to be uploaded is not yet available on the FTP site. Note also that once a task is created or scheduled, you can currently only manage the task through Professional Authoring.

2. Select the required File handling option; whether you wish to copy the file from the FTP site (leaving the file there for future use) or move it (delete it from the site).

3. Select the upload mode you wish to use. The options are:

   - **Append Data -** all records from the respondent list file will be added to the survey database whether or not they already exist in the database. Note that in the event records already exist in the table, these records will be duplicated. If the Validate Emails option is selected then the email addresses will be checked, and any records in the respondent file that have email addresses that already exist in the database will be ignored.
   - **Update Data -** any records in the respondent list file that already exist in the survey database will be updated with values from the uploaded file. Any records in the respondent list file that do not already exist in the database will be ignored.
   - **Merge Data -** both Append and Update modes are used - if there is no match in the key fields then the data will be added, and if there is a match then it will be updated.

The Formatting and validation tab provides some additional options that you can select between (see Formatting and Validation on page 212 for more information).

The Scheduling tab enables you to set when the upload task is to run (see The Upload From FTP Scheduling Tab on page 213 for more information).

8.4.1. Preparing the Respondent List

The respondent list must be in the form of a delimited text file, with column headings in the first row. The delimiter used can be tab, comma or custom (a single specified character). This file can for example be exported from a spreadsheet application such as Microsoft® Excel™ by using the **Save As** function and choosing the format **Text (Tab delimited - .txt)**.

The respondent data file must contain some or all of the following columns depending on the type of survey.

Important
Ensure that the spelling used for the Column Name items is exactly the same as in the table below.

Column Name	Description	Required or optional
name	The full name of the respondent.	Optional
language	For multilingual surveys. This is the respondent's preferred language (if known). The survey will be presented in this language (see appendix for language codes).	Optional
email	The respondent's e-mail address.	Required if the survey is to be sent to respondents via Horizons.
userid	The respondent's userid if logon is required	Optional
password	The respondent's password if logon is required.	Optional

In addition to these columns, any background variables defined for the survey must be represented as columns in the respondent data file (see Use of Background Variables on page 210 for more information). **The column names for these background variables must exactly match the question IDs given to these background variables in Survey Designer**. These new columns will be added to the database as required.

Note: Any columns added to the database will be allowed a maximum field width of 255 characters. Texts exceeding this limit will be truncated.

8.4.2. Use of Background Variables

In the respondent list you can include all the information you know about the respondent. This information can be used both in the survey itself and in reporting. To achieve this you must include this information in the survey as questions, and mark these questions as Background variables.

- If the information is unique for each respondent, for example the respondent's name or email address, the question type to be included in the survey is **Open Text**.
- If the information can be categorized, that is if several respondents belong to each category, for example department, country or language, the question type to be included in the survey is **Single.**
- If several variables of the same category can be applied to a respondent, for example visited websites, the question type to be included in the survey is **Multi**.

For example, assume you have the following information about your respondents:

- o Email
- o Department (Administration, Marketing, Support, Sales)
- o Visited websites (confirmit.com, altavista.com, yahoo.com, lycos.com)

A respondent can have one email address, can belong to one department, and can have visited several websites.

- In the survey, add three questions: one Open question with ID "email", one single question with ID "dept", and one multi question with ID "Web".
- In the single question "dept" insert four answers, one for each department, Administration, Marketing, Support, Sales, in Codes write adm, mark, supp, sales.
- In the multi question "Web" insert four answers, one for each website, confirmit.com, altavista.com, yahoo.com, lycos.com, with codes 1,2,3,4.
- Choose the Variable type "Background variable" for these questions.

Your respondent list must then have the following columns and content:

email	**dept**	**Web_1**	**Web_2**	**Web_3**	**Web_4**
aa@somewhere.com	adm	1	1	0	1
bb@somewhere.com	mark	1	0	1	1
cc@somewhere.com	supp	0	0	1	1
dd@somewhere.com	sales	0	1	1	1
ee@somewhere.com	supp	0	1	1	1

The content of the columns must be: the email address in the column "email", the codes of the variables for the Single question "dept", and 0 (not chosen) or 1 (chosen) for the Multi question "Web".

Remember that each variable in a multi question will require a column in the respondent file.

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

The respondents will not receive these questions. Nevertheless, you will be able to use this information in questionnaire routing and reporting, because the system will perform the linking between respondent list and the background variables.

Note: Do not use reserved keywords as column headers in respondent lists. The system will perform a check during the upload process, and will generate an error message if reserved keywords are found (see Appendix C - Reserved Keywords on page 260 for more information).

Important:
Background variables only have "values" once the respondent has passed them in the survey (and provided the necessary answers). Until this point, the variables are regarded as being empty if they are used in text substitution or scripting. Background variables must therefore be placed as early in the survey as possible, preferably right at the beginning.

Special care must be taken when creating surveys that include a Start Block (see The Block Node on page 82 for more information) if background variables are needed in the Start Block. The background variables MUST then be placed at the beginning of the Start Block such that they are passed first when the interview opens.

Note: You can use date questions as background variables. When uploading respondent data, any date values must be in a format the system can recognize as a valid date. The recommended format is yyyy-mm-dd hh:mm:ss, or yyyy-mm-dd if you do not need to set a specific time.

8.4.3. Formatting and Validation

In the Upload tabs, click **Formatting and Validation** to access a number of properties that you can select for the upload file.

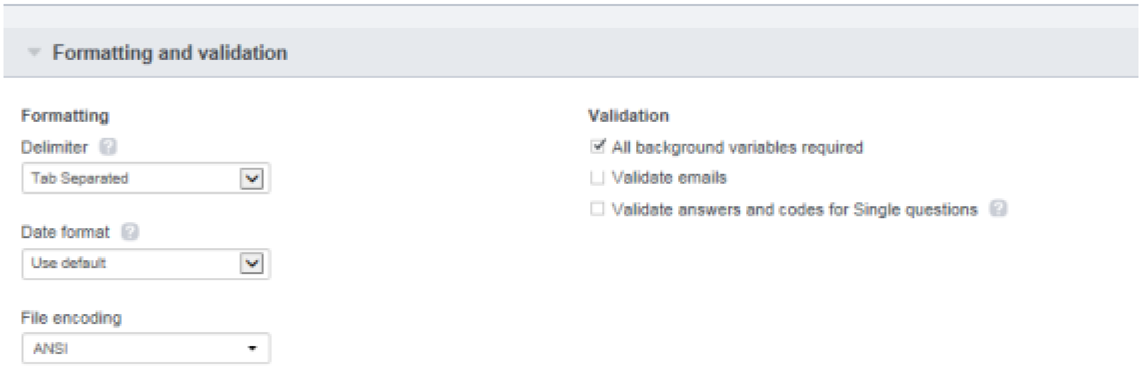


Figure 259 The Formatting and Validation properties

The properties are as follows:

- **Delimiter -** a sequence of one or more characters used to specify the boundary between separate, independent regions in plain text or other data stream. An example of a delimiter is the comma character in a sequence of comma-separated values. Select the delimiter that has been used in the file you are importing. The options are:
  - **Tab separated -** the columns in the file are separated by tabs. Note that tab-separated fields must not be in quotes ("..").
  - **Comma separated -** the columns in the file are separated by commas.
  - **Custom -** a different character has been used as the separator. Type the character that has been used as the delimiter into the Custom Delimiter field.
- **Text qualifier -** this setting appears when the Delimiter selected is Comma Separated or Custom (see above). If the respondent values may contain the delimiter character that is being used as the separator (for example, text fields containing commas as punctuation when Delimiter is set to Comma Separated), then you can use "With quotes" to avoid the file format being corrupted. Note that all fields in the respondent table are of type Text, so if you use "With quotes" for the Text Qualifier then all values (not column headers) must be enclosed with quotes.
- **Date format -** use this option if the respondent file contains a column which will be uploaded to a background variable of type Date, and the date value in the file differs from a format that is supported by the system (yyyy-mm-dd hh:mm:ss or yyyy-mm-dd). You can either select the appropriate date format from the drop-down list, or select Custom date format and then manually type the format into the custom field using the standard format codes: "y" for year, "M" for month, "d" for day, "m" for minutes, "s" for seconds, and "tt" the AM/PM designator.
- **File Encoding -** choose the encoding method used by the respondent list.
- **All background variables required -** if the box is checked and the file does not include all the background variables, the file will not be uploaded and a warning will be displayed. If the upload file does not include all the background variables, uncheck this box to allow the file to be uploaded. Default - checked.

- **Validate Emails -** when selected, the email addresses will be checked and rows containing invalid email addresses will not be uploaded. On completion of the upload, an email listing the rows that have not been uploaded will be sent to the user. Note that the system does not check if the addresses actually exist; only that the format is correct.
- **Validate answers and codes for Single questions -** when selected, the codes and answers for single questions in the respondent file are validated. The validation process will first check if the value specified in the file exists as a code. If it does, the record will be uploaded. If it does not exist, the validation process will check if the value is specified as an answer label in the Single question. If so, the label will be converted to the code specified in the Single question and stored as such. If this validation process fails, the record will be rejected and a notification email with the rejected records will be sent to the user.

8.4.4. The Upload From FTP Scheduling Tab

If you have licensed the FTP add-on and intend to upload a respondent list from FTP, then you can schedule the upload to be performed immediately or at some point in the future. If you select **Future**, then you can also set the task to repeat. Note that you can set up the task to run in the future even if the file to be uploaded is not yet available on the FTP site.

When you select **Future**, the additional options become available.

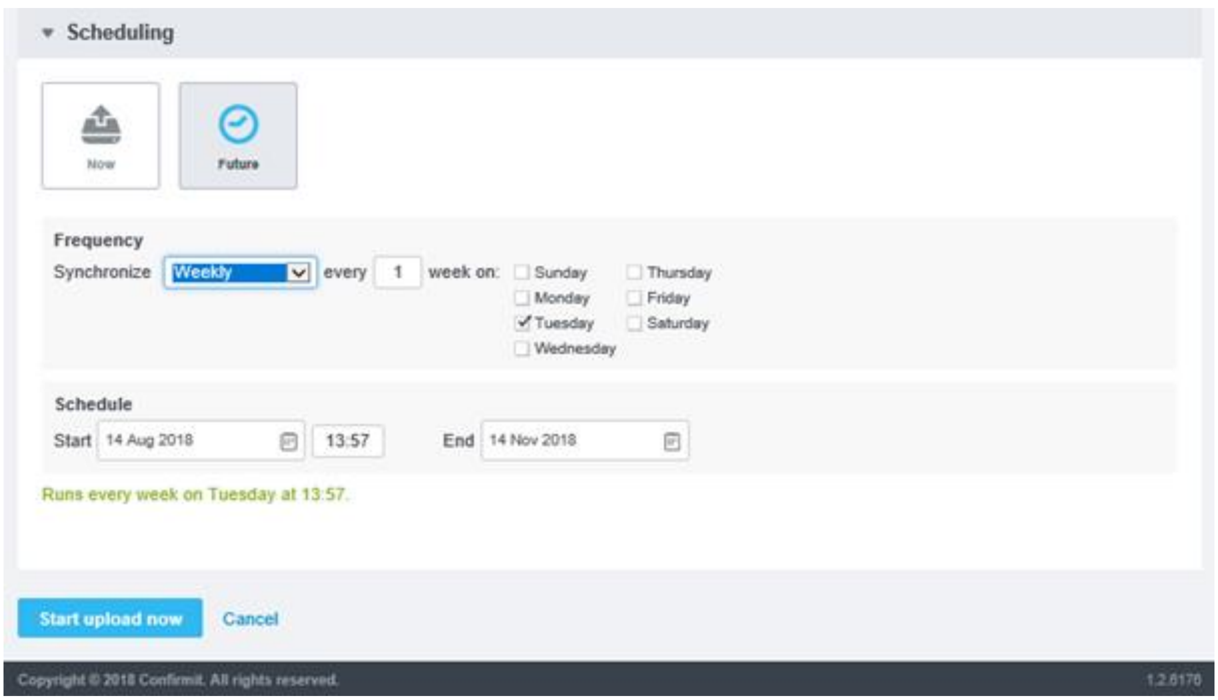


Figure 260 The FTP Upload Scheduling tab

- **Synchronize -** here you select the frequency for the upload. The options available to you have different parameters; select as required.
- **Schedule -** choose a start date and time for the task, and if it is to run more than once, when it is to stop running.

  The schedule you have set is displayed below the fields.

Note: Once a task is created or scheduled, you can currently only manage the task through Professional Authoring.

8.5. Email Management

The Email Management page is where you create and set up the emails you wish to send to your respondents. You will probably need several types of email, for example an invitation email asking the respondent to participate in your survey, and a reminder email to be sent to respondents if after a preset time they have not yet replied.

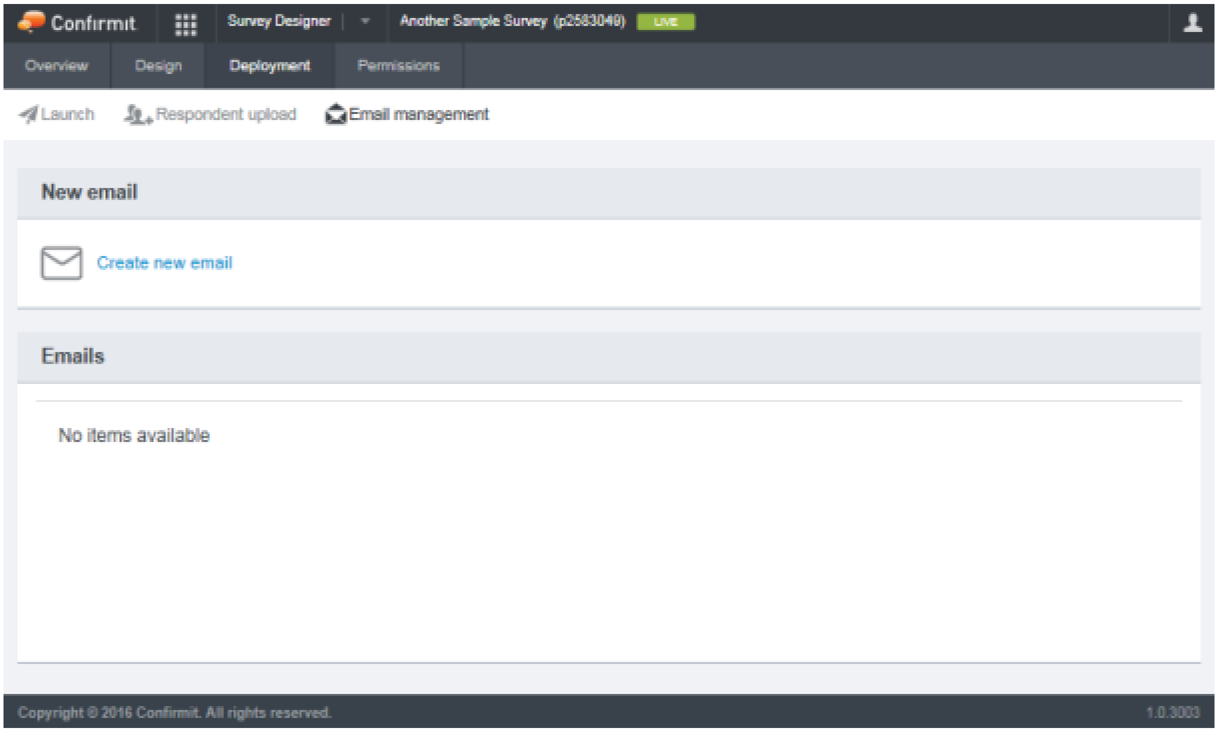


Figure 261 The Email Management page

When you open this page, any emails that are already created in this survey will be listed under Emails. This list can be sorted alphabetically by name, or by the date the emails were last sent.

8.5.1. How to Create a New Email

You can create any number of emails, with different selection criteria, options and content, and set them up separately to be sent at different times and dates.

1. On the Email Management page, click **Create new email**.

   The email editing page opens.

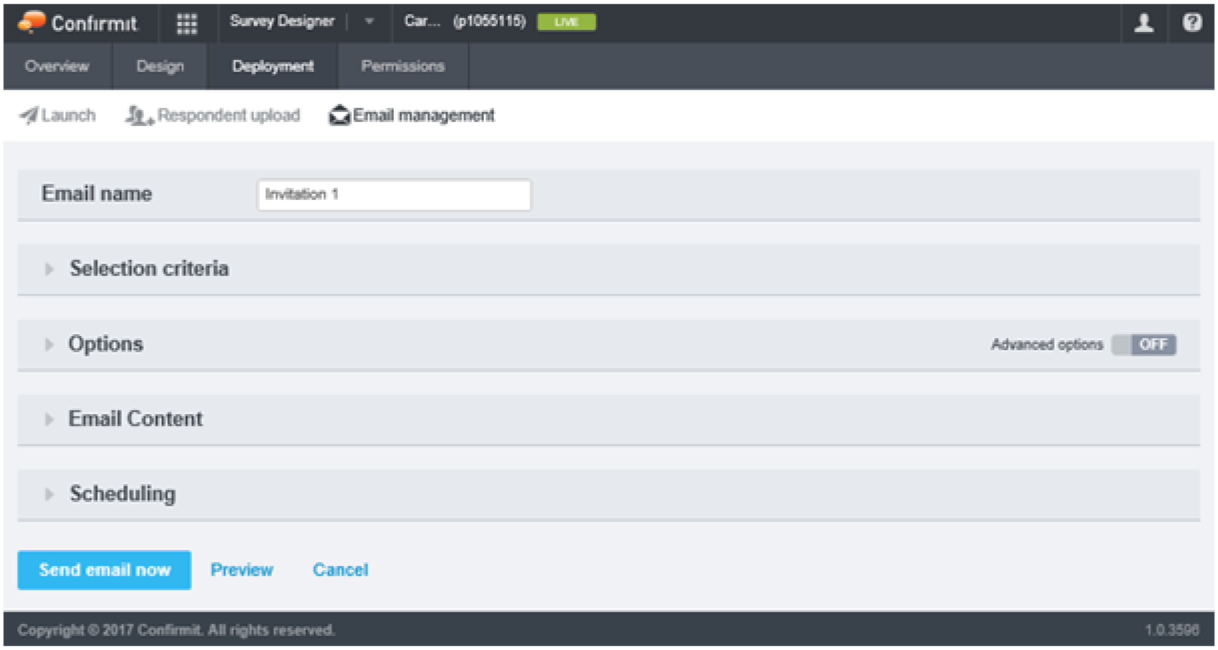


Figure 262 The Email Edit page

Note: When setting up emails, if the survey is currently closed (see Changing the Survey Status on page 23 for more information) then a warning message is presented at the top of the page.

2. Type the desired name for the email into the Email name field. Default will be Invitation.
3. Open the tabs and type the appropriate details into the various fields, and if the survey is multilingual select the default language.

   Note that the From... and Reply to... fields cannot be empty.

Important
To avoid your emails being blocked as spam, the From address must match the sender domain (see Spam on page 224 for more information).

4. Under Email Content, for each language the email is to be sent in, type or copy/paste the subject and the email body text.
5. Under Scheduling, select when you want the email to be sent.

8.5.1.1. The Selection Criteria Tab

The Selection criteria tab holds the settings that allow you to select the respondents who are to receive the email.

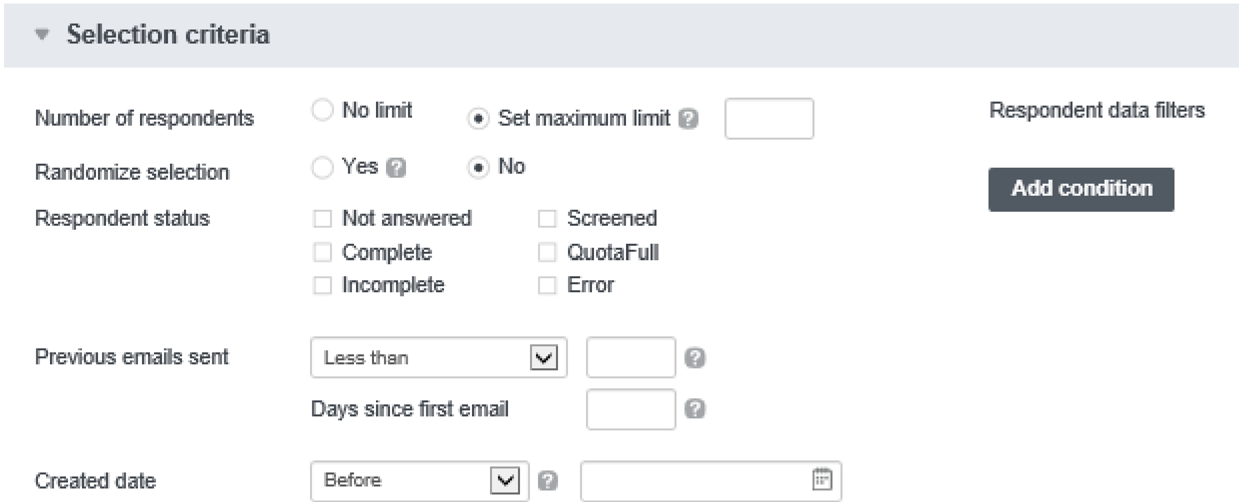


Figure 263 The Selection criteria tab

- **Number of respondents -** for large emailing jobs, to reduce possible congestion you can limit the number of emails sent in a single batch. You can then stage the emails through Confirmit by setting up a recurring task that sends out a limited number of emails each time period until all respondents that match the search criteria have received the email.
  - **No limit -** all the selected respondents are emailed in one batch.
  - **Set maximum limit -** limits the number of emails sent in a batch. Select the button and type the required number into the field.
- **Randomized selection -** when not selected, respondents are selected in order of their respondent ID. When selected, respondents are selected in random order.
- **Respondent status -** chooses respondents based on the status of the interview.
  - **No selection –** all respondents will receive the email.
  - **Not answered –** all respondents who have not yet entered the survey.
  - **Complete –** all respondents who have completed the survey. (Useful for sending “Thank you” e-mails).
  - **Incomplete –** all respondents who have started answering the survey, but have not yet completed it.
  - **Screened –** all respondents who have the “Screened” status (see The Stop Node on page 89 for more information).
  - **Quota full** – all respondents who have been stopped due to a full quota (see The Stop Node on page 89 for more information).
  - **Error -** all respondents who have been stopped due to an error in the questionnaire.
- **Previous emails sent –** the number of e-mails sent to a respondent is recorded for each respondent, and can be used as a selection criterion. You can send emails only to respondents who have already received the selected number of emails. Select the required operator and type the appropriate number into the field.
  - **Days since first email -** the date the first email was sent to a recipient regarding this survey is recorded. Only send emails to recipients who were first contacted longer ago than the specified number of days.
- **Created date -** the date the respondent was added to the survey. Only send emails to respondents who were added as specified. Select the required operator, then click into the field to open a calendar and select the appropriate date.
- **Respondent data filters -** here you can filter the invitation emails so they are only sent to a sub-set of the respondents (see Respondent Data Filters on page 217 for more information).

8.5.1.1.1. Respondent Data Filters

You can filter the invitation emails so they are only sent to a sub-set of the respondents that you have specified in the selection criteria. You create conditions for the filter based on the answers to open text and background single questions.

1. Go to **Deployment > Email management**.
2. Either click **Create new email** or click on an existing email to open it for editing.
3. In the Selection criteria area, click **Add condition**.

   The selection field opens.

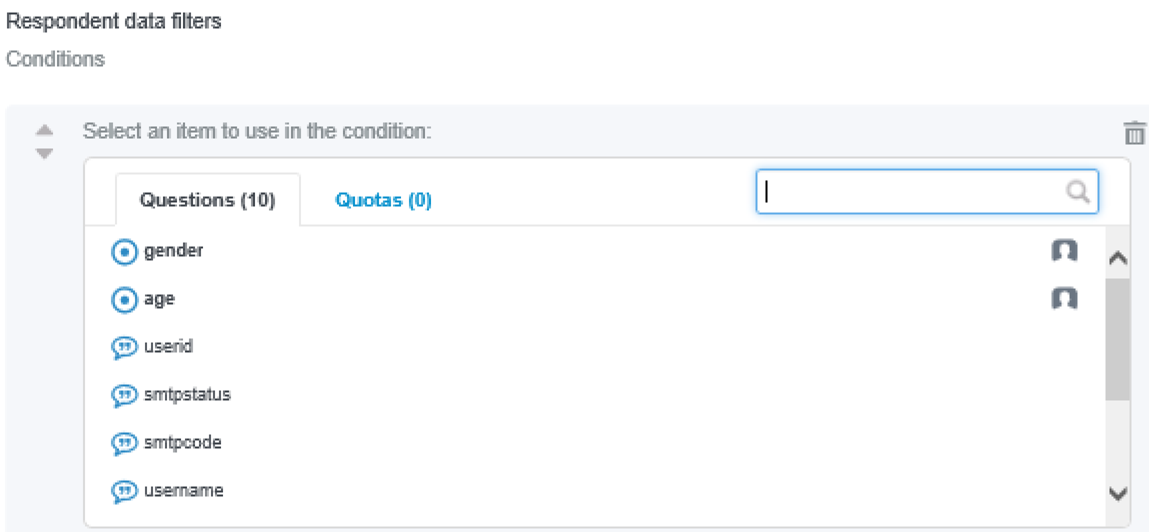


Figure 264 Example of the selection field

   This field lists all the open text and background single questions.

4. Click on a question in the list to select it.

   In the event you select a background single, the answer options for that question are displayed.

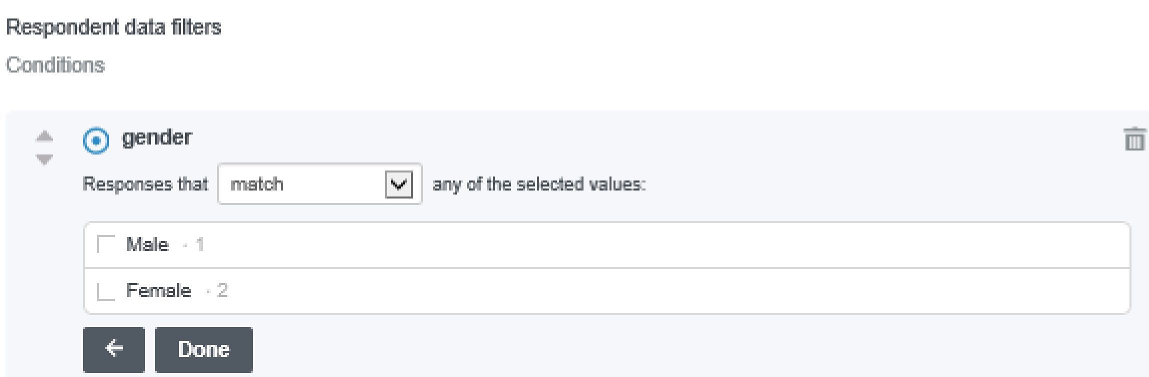


Figure 265 Example of the answer options for a background single question

   In the event you select an open text question, then an additional criteria selection field and a text input field appear.

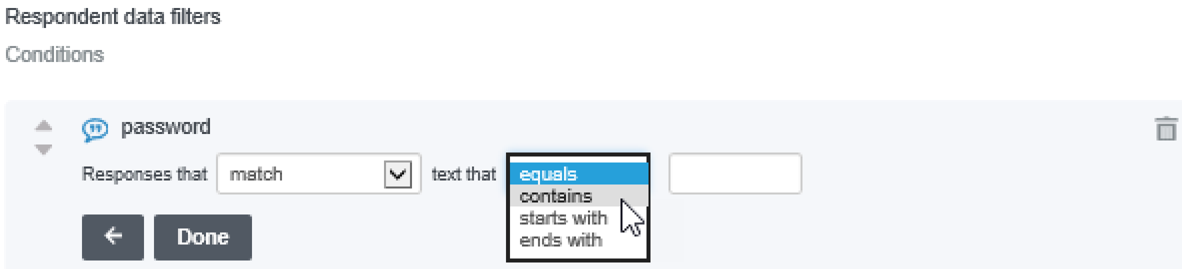


Figure 266 Example of the answer options for an open text question

5. Select the answer you wish to filter for, select the appropriate criteria from the drop-down lists, and type text as appropriate to create the required condition.

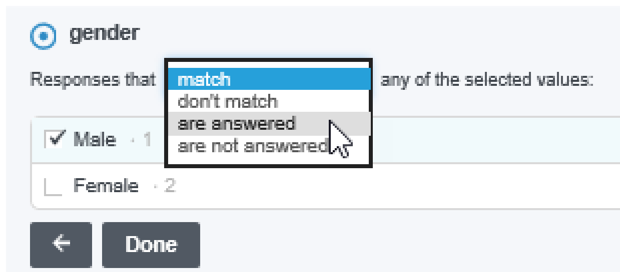


Figure 267 Selecting the answer and the appropriate criteria

6. On completion, click **Done** to create the condition.

   The condition is created and added to the Respondent data filter.

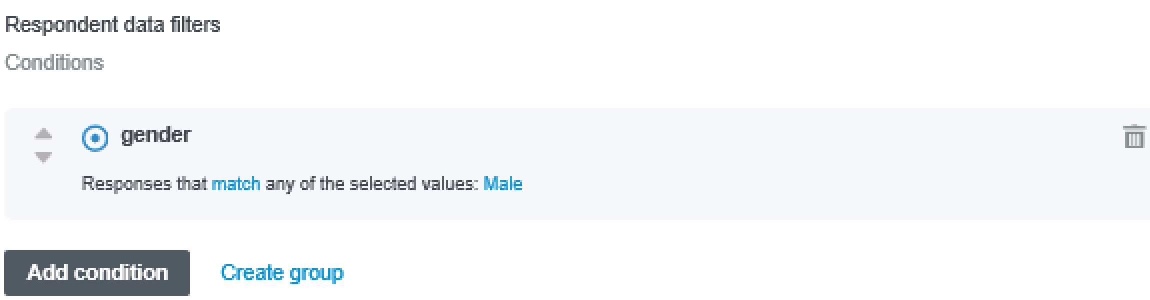


Figure 268 Example of a filter condition

You can create as many conditions in the filter as required, place them into groups, and order the conditions as necessary.

To edit an existing condition click on a blue criteria link for that condition. To delete an unwanted condition click the delete icon towards the right side of the condition.

8.5.1.2. The Options Tab

The Options tab is where you select the email format and set up the from and reply-to addresses and select the default language.

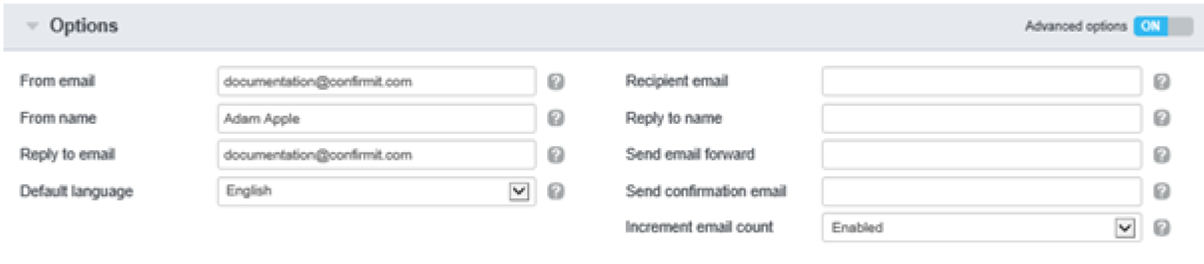


Figure 269 The Options tab

- **From email -** the email address of the person sending the email (your email address). Note that changing this may prevent delivery reporting, and may cause the email to be designated as spam.

Important
To avoid your emails being blocked as spam, the From address must match the sender domain (see Spam on page 224 for more information).

- **From name -** the name of the person sending the email - your name. This will be displayed in the “From” field as seen by the recipient.
- **Reply to email -** the address to which any reply emails will be sent. To receive reply mails, you must specify a valid email address here.
- **Default language -** if the survey is multilingual, all the selected languages are listed here. Select the language that is to be used as default. When set to “None”, respondents who do not match any of the languages selected for the survey will not receive the email.

Advanced options

Click the **Advanced options** button to access a number of additional fields.

- **Recipient email -** you can override the respondent email addresses taken from the respondent list with addresses taken from another variable in the survey. If you wish to do this, specify the variable here.
- **Reply to name -** this will be the “To” field when the respondent clicks the Reply button in their email system. This could for example be “Do not reply”.
- **Send email forward -** a copy of the email can also be forwarded to, for example, a supervisor to inform them that the survey invitation has been sent out. The survey link will not be included in this “information” email.
- **Send confirmation email -** if you (or someone else) wish to receive an email confirming that this email has been sent, add the appropriate email address here.
- **Increment email count -** the email counter is used by the *Selection criteria* > *Previous emails sent* property, and enables you to send emails only to respondents who have previously been sent a specified number of emails regarding this survey (see The Selection Criteria Tab on page 215 for more information). The email counter will normally count each email that is sent to a respondent, but there may be occasions when you do not wish a particular email to be registered in the count. In such a case, disable this property for the email.

8.5.1.3. The Email Content Tab

Here is where you add the text that you wish to send to your respondents. If your survey has more than one language, then select the language you wish to work with.

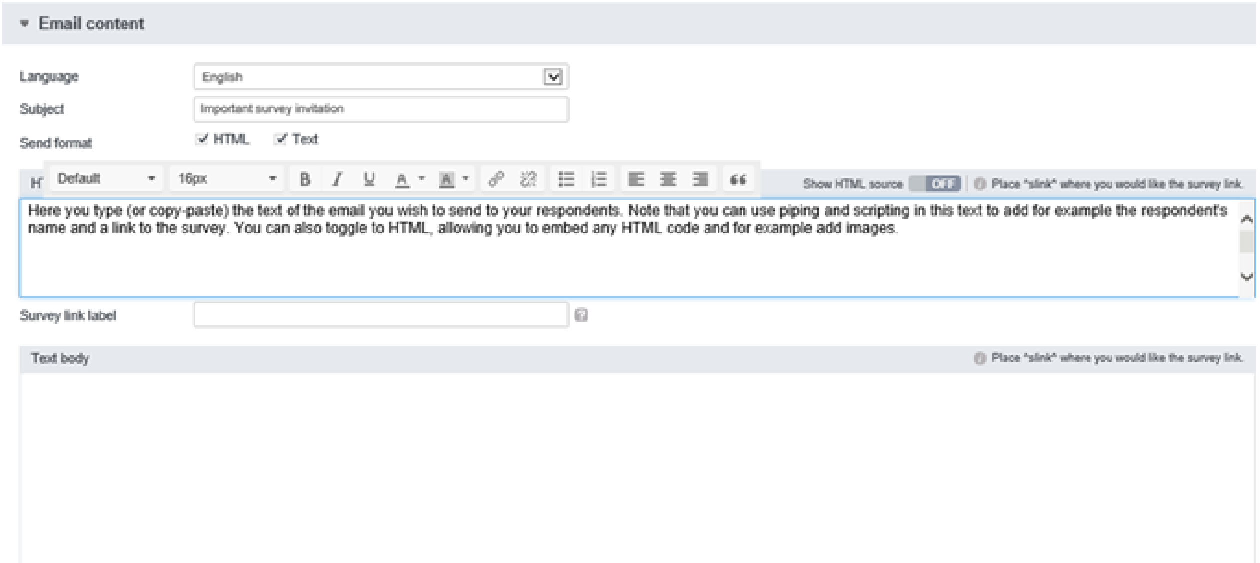


Figure 270 The Email Content tab

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

- **Send format –** check/uncheck the boxes as required to send the email in the desired format(s).
  - **HTML** – check to send the email as HTML code. Only mail clients that support HTML will be able to read the email.
  - **Text** – check to send the email as plain text. Most mail clients will be able to read it.

In both fields, you can type in the desired text or copy and paste from another application.

When you have selected HTML as a Send format and you click into the text field, then the text formatting toolbar will be available for you to add inline formatting to the text of the HTML body (see The Text Formatting Toolbar on page 104 for more information). Note that you can use text substitution (piping) and coding to include for example the respondent's name and the URL to the survey in the text of the email (see Text Substitution on page 223 for more information). The **Pipe values** tool (at the right end of the toolbar) allows you to easily accomplish this (see The Pipe Values Tool on page 220 for more information).

Set **Show HTML source** to display the text in the HTML field as HTML code. This then allows you to embed any HTML code and for example add images.

8.5.1.3.1. The Pipe Values Tool

While you are creating your email, you can easily add piping to the text or add the survey link.

1. Ensure the HTML check box is checked, then click into the text field where you wish to add the piping code.

   The toolbar opens.

2. Click the **Pipe values** tool.

Figure 271 The Pipe values tool

3. The Pipe values overlay opens

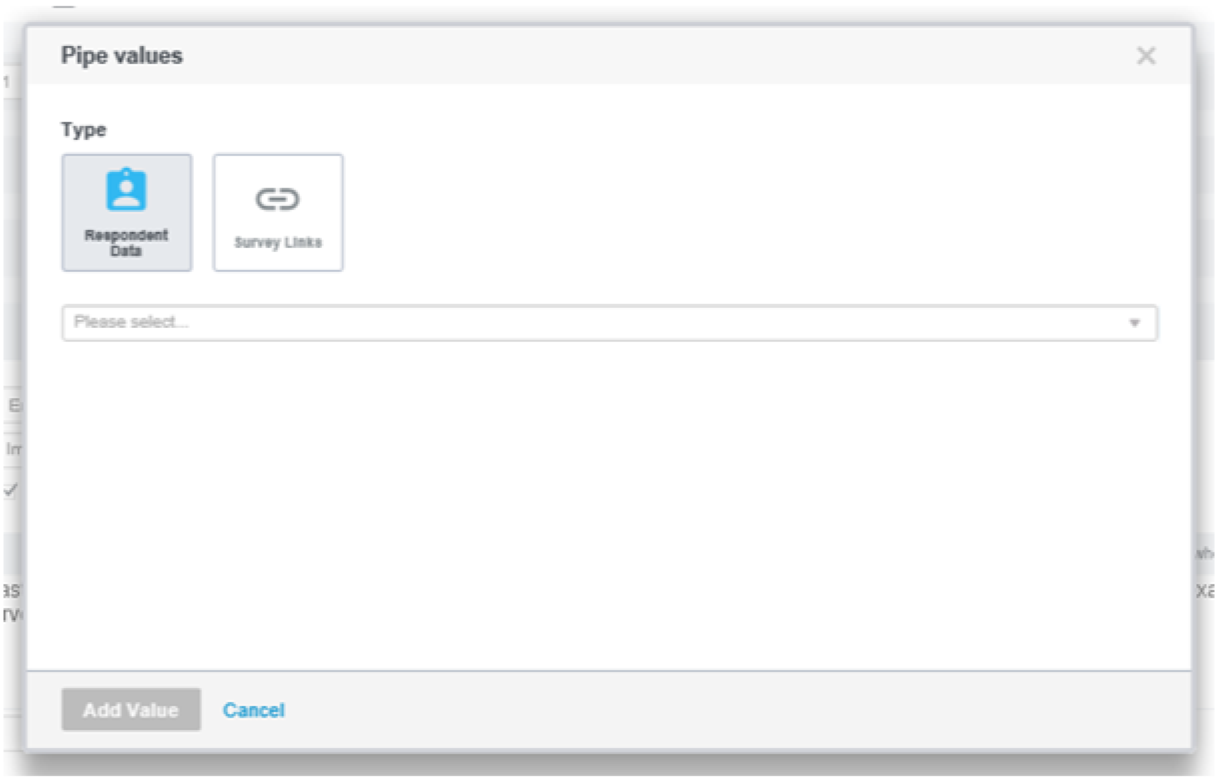


Figure 272 The Pipe values overlay

4. Select whether you wish to add respondent data or a survey link.

   If you are adding respondent data, click into the selection field to open a list of the questions then select the question you wish to use. The code that will be added to your email is displayed below the question so you can check that it is correct.

   If you are adding a survey link, click into the selection field to open a list of the link types then select the type you wish to use. The code that will be added to your email is displayed below the field so you can check that it is correct.

5. Click **Add Value** to add the code to the text.

8.5.1.4. The Scheduling Tab

Here you specify when the email is to be sent.

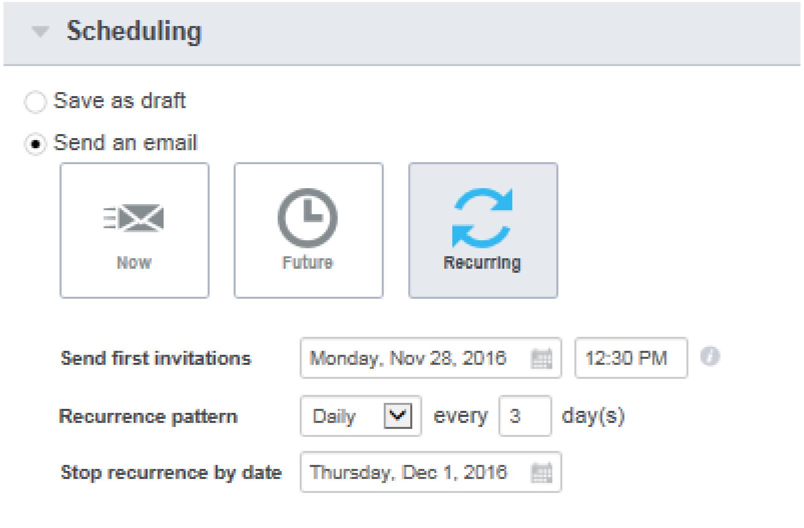


Figure 273 The Scheduling tab

- **Save as draft** - select this until the email is complete and you are ready to send it. On this setting you can save it as you are editing it, and preview it.
- **Send an email** - three options become available:
    - o **Now** - immediately sends the email to the respondents selected by the settings you have made in the Selection Criteria tab (see The Selection Criteria Tab on page 215 for more information).
    - o **Future** - set a date and time for when the email is to be sent.
    - o **Recurring** - set the date and time when the email is to be sent for the first time, when it is to be resent, and when the system is to stop sending it.

Note: The times displayed in this field is the "Server time" - the time at the server that will be sending the emails. Be aware that if you are located in a different time zone to the server then there will be a discrepancy between your local time and the server time.

8.5.1.5. Previewing Your Email

Once you have created your email, click **Preview** in the lower-left corner of the page to preview it. You will then see it as the recipient will see it, so you can ensure it looks as you wish it to. There is a separate view for each of the languages selected for your survey (see The Languages Area on page 45 for more information), and the send format(s) you have selected (see The Options Tab on page 218 for more information).

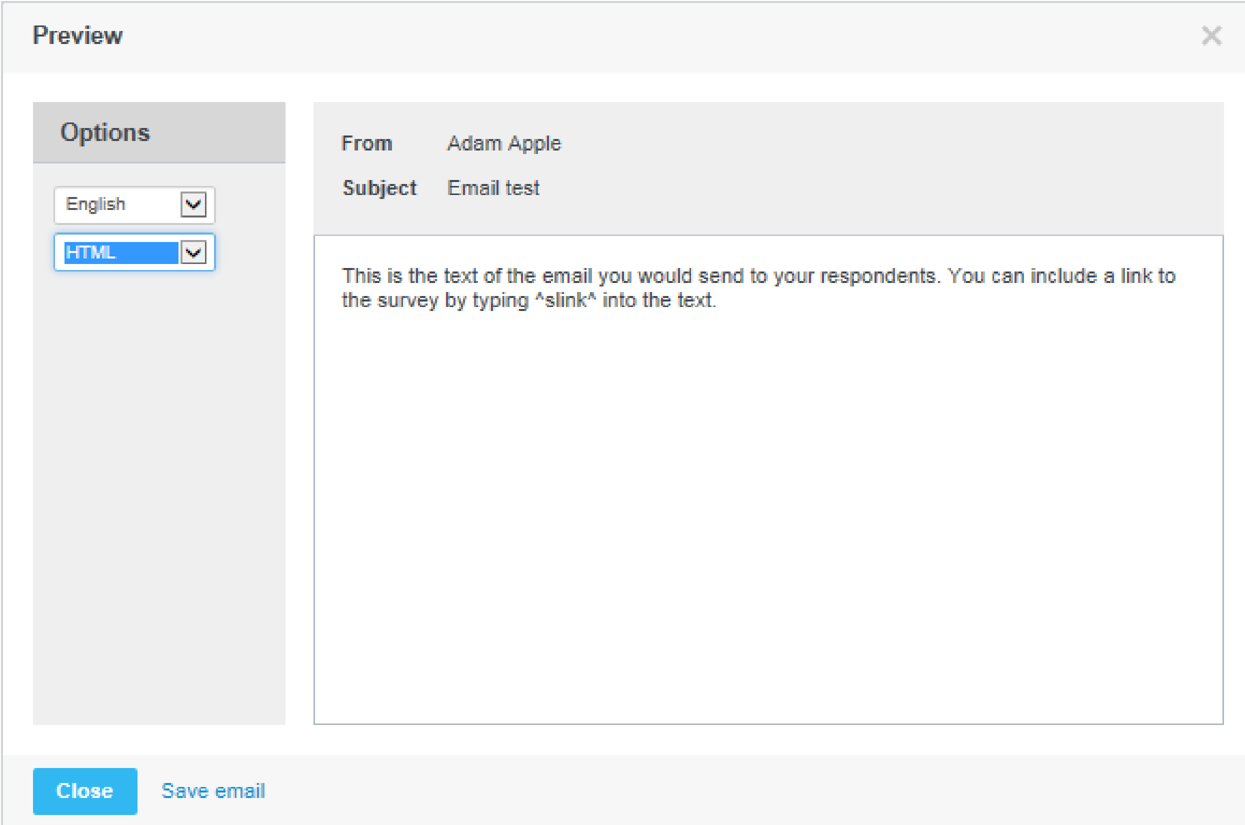


Figure 274 Example of the email preview overlay

Click **Close** to return to the Email management page.

8.5.2. Text Substitution

You can "personalize" the emails you send to your respondents by including the contents of a respondent list column, for example the respondent's name, in the email. To do this you use a form of text substitution using the ^ character. The exact code you will need to include in the email will depend on the column name in your respondent list that contains the required information. If for example your respondent list includes a column called “name”, which holds the full name of the respondent, then you can add the code **^name^** to the text of the email, as in the figure below.

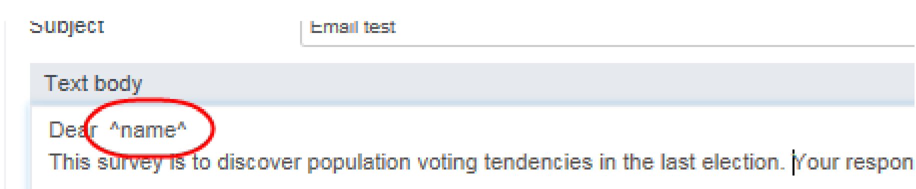


Figure 275 Substituting text in an email

Now when the respondent receives the email, it will read for example, “Dear John Smith”.

If your respondent list has several columns for the name information, for example “firstname”, “lastname”, “title” etc, then you could use the text **Dear ^title^ ^lastname^**, which would in this instance give "Dear Mr Smith".

To add the survey URL into the text in the email, use the code **^SLINK^**.

The ^ character can be used in any of the fields in the email form, so you can for example add data from the respondent list into the Subject line.

8.6. Spam

Confirmit allows users to send e-mails to invite respondents to participate in surveys, to send reminders and to thank them for their participation. However, sending an e-mail to a valid address is no guarantee that the message will be delivered. A Fact Sheet detailing different causes for non-delivery is available from Confirmit's Extranet at http://extranet.confirmit.com/home.aspx, (a login and password are required). In the following we will concentrate on measures introduced in Confirmit that will help to ensure that mails are delivered. The information is primarily addressed to Confirmit's SaaS clients, but the concepts presented herein also apply to On-Premise clients.

8.6.1. Minimizing Spam

To stop or minimize spam (unwanted commercial marketing e-mails), activities ranging from governmental regulations to local spam filters on the recipient computers are implemented.

For Confirmit users, three key areas are of particular relevance:

- **Legislation** - Government bodies in most countries have introduced laws regulating permitted ways of e-mailing. All users of Confirmit's SaaS Environment are required to abide by Confirmit's AUP, and by any laws and regulations applicable in any country in which they are operating. Clients operating on their own servers are recommended to follow similar guidelines.
- **Spam Filters -** Most spam filters (such as SpamCop) rely on "black-lists". By subscribing to a spam filter, a company can automatically screen away all incoming e-mails where the sending server is included in a black-list. The usual reason for a sending server being black listed is because a certain number of e-mail recipients over a short period of time have reported the e-mail as spam. At Confirmit we monitor black-lists continually, and have observed that recipients of survey invitations sometimes cause the Confirmit e-mailing servers to be listed for short periods of time. It is therefore important that e-mails from Confirmit are written such that they do not resemble spam, and that all recipients have agreed to accept e-mails.

  Another triggering factor for e-mails being stopped in spam filters is when the sender address does not match the sender domain. This is the typical situation where a Confirmit SaaS client sends e-mails from his own sender address (for example *name@company.com*), while the sending server address is a Confirmit domain. This is considered as e-mail spoofing, a technique used by spammers, and can cause mails to be blocked. The solution is to send e-mails from domains that are registered on the Confirmit servers. See below for further information regarding this solution. When sending e-mails and using correct domain names, Confirmit may also support anti-spam solutions such as Sender ID and DomainKeys
- **Compliance with Standards -** E-mails should be sent in accordance with certain standards, and particularly relating to (1) e-mail format and (2) the technical setup. See the following section for more information about (2).

Confirmit addresses several of the issues relating to inconsistency between sender address and server domain. This is achieved by the introduction of the Activate sender domain/Email Delivery Report feature in Confirmit.

8.6.2. Avoidance of "Spoofing" Status

When sending e-mails, an additional header is put on the SMTP message. This header includes the address of the sending server. If this header does not match the address specified in the "*From*" field, it is called "spoofing", and many mail relays will classify this as SPAM and block it. The Fixed Domain functionality forces the "From" address to be the same as the one in the SMTP header, and the possibility of e-mails being classified as SPAM is reduced.

If you are working in the SaaS environment, you will by default have either the "@us.confirmit.com" or the "@euro.confirmit.com" sender domain in the **From** field when you send emails. You can manually override this fixed sender domain by typing another sender domain into the Email, but you should be aware that in these cases 1) incomplete Email Delivery Reports will be generated, and 2) the emails are more likely to be interpreted as spam by recipient servers because the sender email domain will not match the sender server domain.

When using the default fixed sender domains "@us.confirmit.com" or "@euro.confirmit.com", you can still receive feedback from respondents when they reply to your email. To recieve reply mails, you will have to specify a valid email address in the **Reply to** field.

Note that "Out of Office" replies will always be sent to the From address according to the emailing standard.

Note: Even if the Fixed Sender Domain/Email Delivery Report is activated, the Confirmit user can still choose to use another "*From*" (sender) address. In this case a warning will be displayed in Confirmit informing that this may cause the e-mails to be perceived as spam, and that the Email Delivery Report will be incomplete.

9. Permissions

For all surveys, the user who creates the survey is the survey administrator and owner, and a survey is initially invisible and inaccessible to all other Confirmit users. As the survey administrator you have full access to view, edit and delete the survey, and can manage all modules, and you must give access permission to any other users who are to be able to view or edit the survey. To give access permission to the survey to other users in your organization:

1. Click the **Permissions** tab.

   The Survey Permissions page opens. This lists all the users who currently have access to the survey. The number of users with access is given towards the upper-right corner of the list.

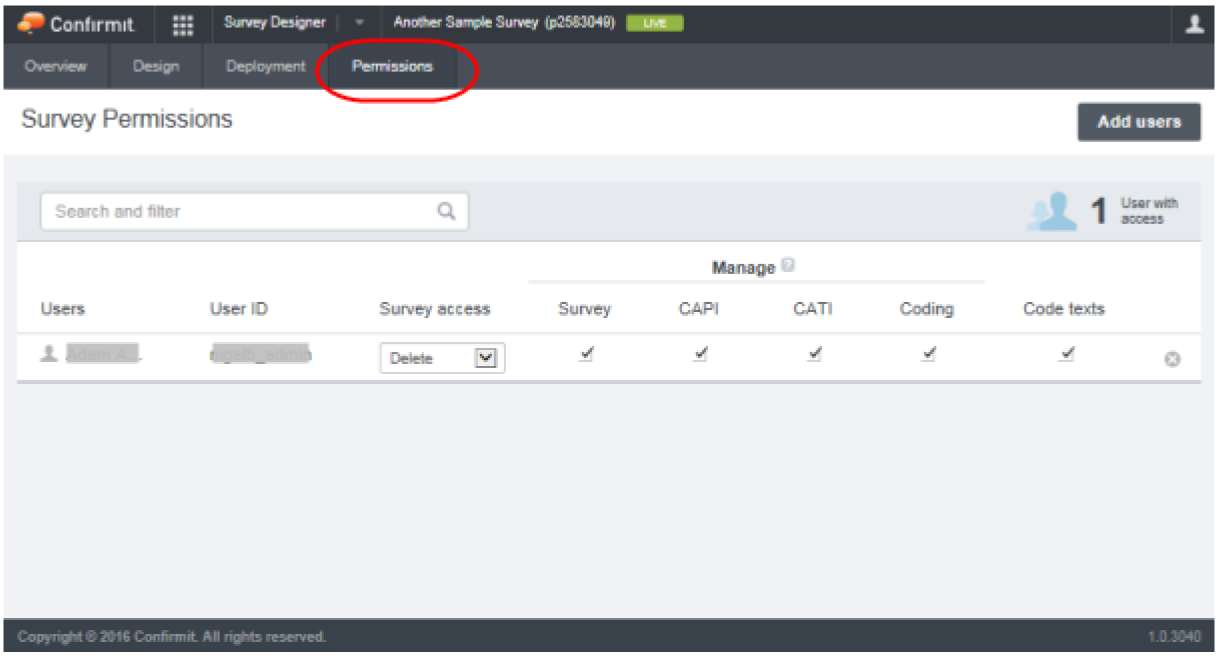


Figure 276 Example of the Permissions page for a new survey

2. Click **Add users**.

   The Add users overlay opens. This overlay lists all Confirmit users in your organization.

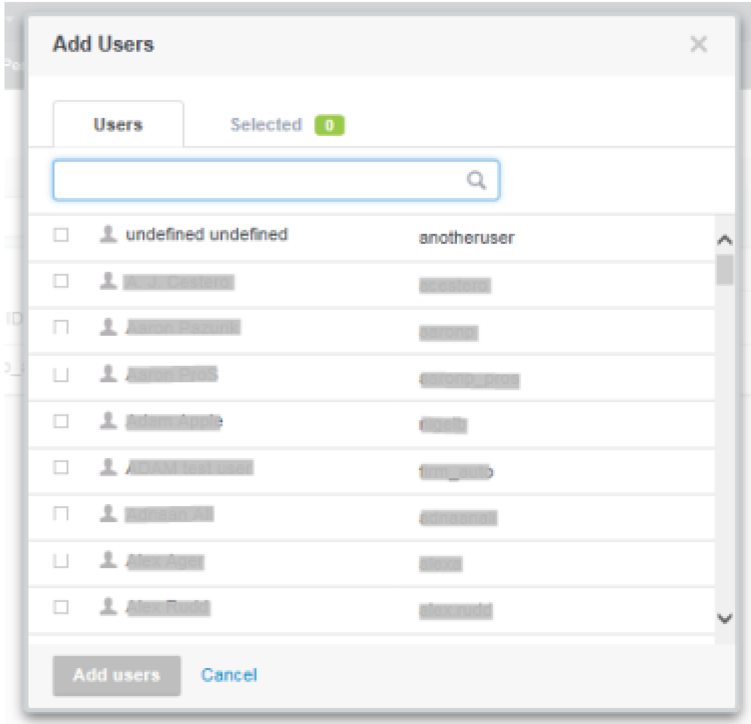


Figure 277 The Add users overlay

3. Check the boxes beside the users you wish to allow access to your survey.

   Note that the number of users you have selected is given in the green Selected field and on the **Add users** button.

4. When you have selected the desired users, click **Add users**.

   The selected users are added to the Survey Permissions page.

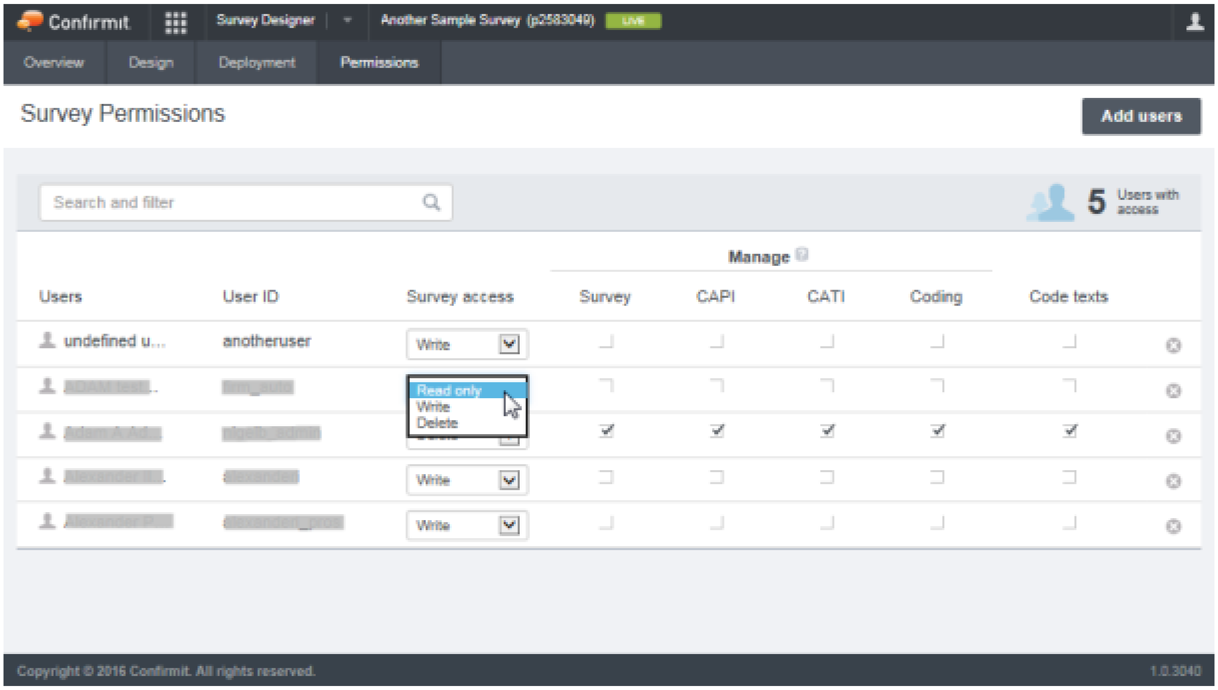


Figure 278 The Survey Permissions page with additional users

5. For each user you can now set the desired access permission in the drop-down, and select any additional modules that the user is to manage.

The fields and options are as follows:

- **Survey access -** click the down-arrow beside a user's field to open a drop-down list of the permissions, then select the appropriate permission for that user. The options are:
    - o **Read only -** the user has only Read permission, i.e. he/she can view the questionnaire and associated reports but is not allowed to add new or delete existing elements in them.
    - o **Write -** the user has Write permission, i.e. he/she is allowed to add questions to the questionnaire and reports.
    - o **Delete -** the user has Delete permission, i.e. he/she is allowed to work on the questionnaire and reports, and is allowed to delete items in them.
- **Survey -** The user is the administrator and owner of the survey. He/she may alter the questionnaire, set the survey live, check response status, etc., and delete the entire survey. This is usually the person who initiates the survey.
- **CAPI -** the user is a CAPI Supervisor. See also the CAPI User Guide.
- **CATI -** the user is a CATI Supervisor. See also the CATI Supervisor's Manual.
- **Coding -** the user has permission to administer the Opentext coders for the current survey. Note that when the survey is created, this permission will be given automatically to the survey creator.
- **Code texts -** the user has permission to code open-text questions in the current survey.

In the event your list of users is extensive, you can search for the desired user. Type characters into the Search field. As you type, the list will be filtered to include only those users who's User name or User ID contains the entered characters. Note that the characters can be anywhere in the User name or User ID, and are not case-sensitive.

To remove a user from the list, click the **X** button at the right end of the appropriate user's row and confirm the removal.

10. Survey Reporting

This chapter describes the various methods and functionality available to create reports using the data you have collected from your surveys.

10.1. Instant Analytics

Instant Analytics is a "standard" simplified report that you as the survey designer can create for any launched survey. The general layout of the report is preset and cannot be changed.

The report is intended to enable the user to quickly view the survey status, quota information and responses, and interactively perform cross-tab analysis on the data. You can also save reports and export the raw data.

Once you have created the report, Professional users will be able to access it via a link on the survey overview page. If changes are made to the survey, for example new questions are added, then when you compile the survey you can also select to update the report. The data presented in the tables and charts in the report is updated automatically as respondents reply to the survey.

You can create "versions" of the report by specifying which interview statuses and questions are to be displayed and then saving a copy of the report.

Note: The Instant Analytics report only accepts data from the Production database. So until some respondents have replied to your survey, the tables and graphs in the report will be empty.
Instant Analytics is not currently supported in Safari.

Instant Analytics can handle up to 100000 responses, including all statuses except "Not answered", with a limit of 2000 questions per survey. If the survey has less than 100 000 responses then you will be able to select the Update Instant Analytics Report box in the Launch Survey page.
In the event the Exclude from reporting property has been set for questions in the survey, these questions will also be excluded from the IA report.

IA reports can include a maximum of 200 open text or open text list questions. In the event a survey with more than the maximum is launched with the IA report option selected, the launch will abort with an error message. If this occurs, you must open questions you wish to exclude and select the Exclude from Reporting option, until you have fewer than 200 such questions.

10.1.1. Creating and Viewing the Instant Analytics Report

Once the Instant Analytics report for a survey is created, if changes are later made to the survey these will be carried through to the report when the survey is re-launched.

You can create or regenerate the report without launching the survey. To do this, in the survey's Overview page, click the **Generate Instant Analytics Report** icon towards the right end of the Status area title bar.

If the report has not yet been generated, a confirmation dialog opens. Click **Generate report** or **Cancel**.

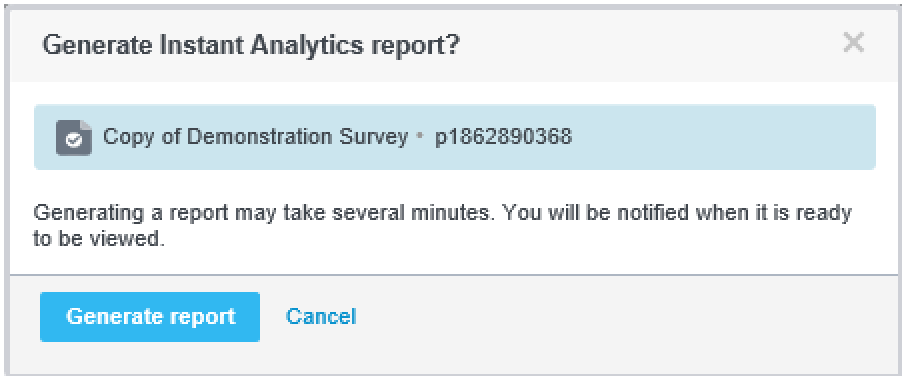


Figure 279 The generate report confirmation dialog

Once the report has been created for a survey, you can view the report at any time by:

1. Going to the Surveys list page and clicking the **Open Instant Analytics Report** icon towards the right end of the appropriate survey row (see The List Details on page 15 for more information).
2. Going to the survey's Overview page and clicking the **Open Instant Analytics Report** icon towards the right end of the Status area title bar.

The report will open in a new window.

Note: The Instant Analytics report only accepts data from the Production database. So until some respondents have replied to your survey, the tables and graphs in the report will be empty.

10.1.2. The Report Layout

The layout of the Instant Analytics report is preset and cannot be changed. The tab bar can contain up to four tabs. The Overview and Responses tabs will always be visible; the Quotas and Verbatims tabs will only appear if the survey contains quotas and verbatim questions respectively.

If you have Administrator permission to your system then you can add a logo to the upper-right corner of the report page. To do this, in Horizons Professional Authoring, go to the **Home > Company > Company Settings** menu item and then to the Branding page. Once here, add the URL to your logo file into the IA Report Logo field, then save the changes.

10.1.2.1. The Report Overview Tab

The report opens at the Overview tab.

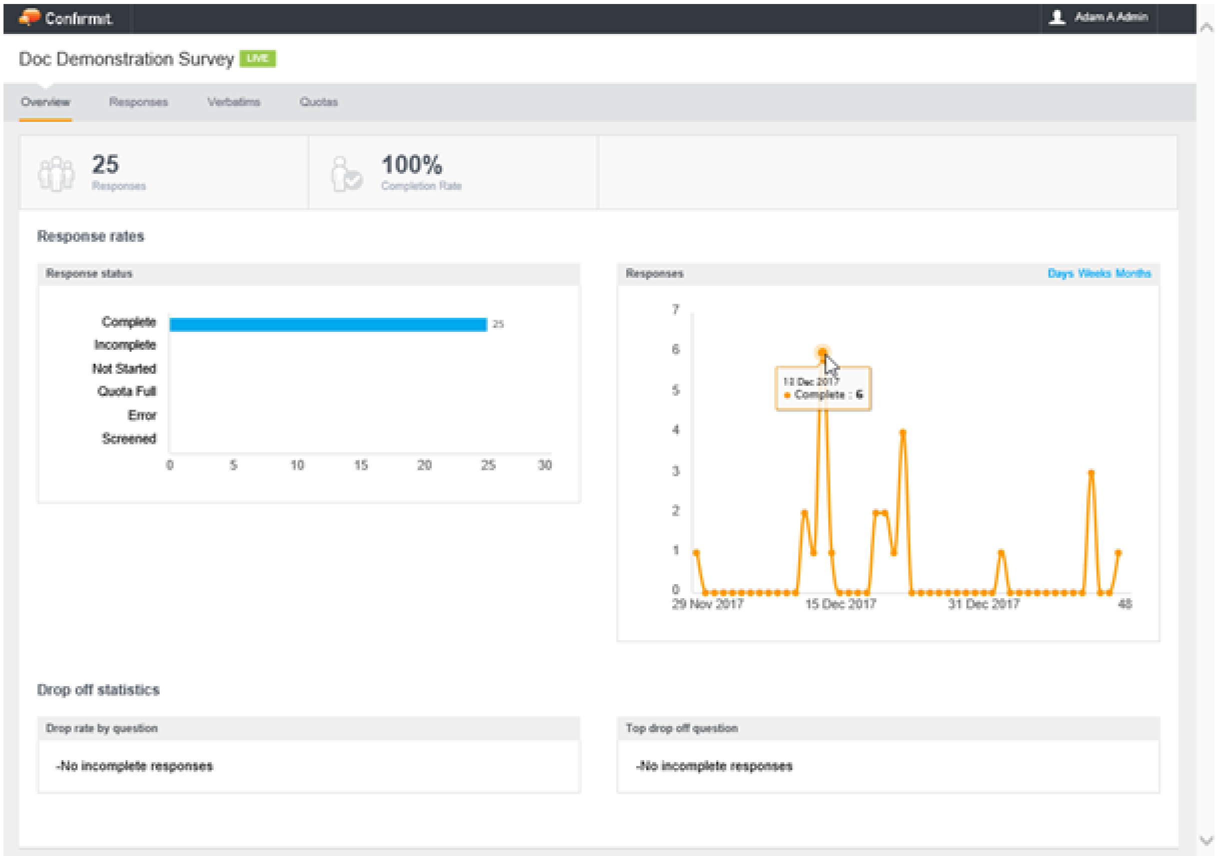


Figure 280 The Overview tab page layout

The report title shown towards the top left corner of the page is always the name of the survey. An indicator beside the title (green for live and red for closed) shows the current state of the survey. Note that for a live survey the data will be updated continuously.

The Responses bar shows the current number of responses, and the Completion rate. If the survey is limited with some invitation emails having been sent, then this will be the response rate as a percentage of the number of emails sent. In addition, the number of invitation emails sent will be given.

The Responses chart can show the responses aggregated by day, week or month.

In the event some of the respondents have left the survey before completing it, the Drop off statistics area shows the first question on the page at which the respondent(s) left the survey. The Top drop off question shows the question at which the majority of non-completion respondents left the survey.

Hover the mouse pointer over a chart to show details about that bar or point in the chart.

10.1.2.2. The Responses Tab

The Responses tab lists all the survey questions that you wish to be included in the report, giving all the answer options for each question and the count and percent results for each answer.

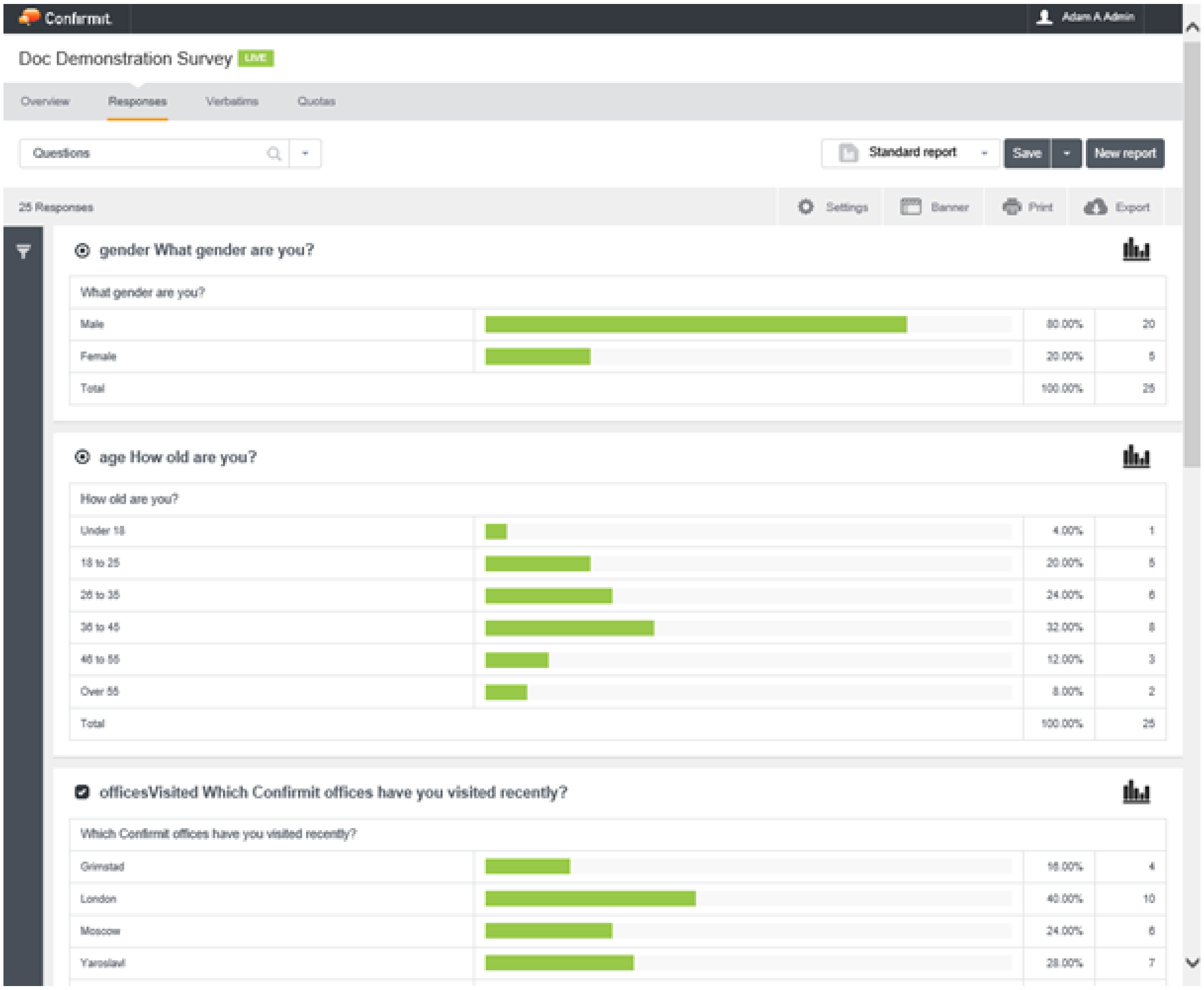


Figure 281 Example of the Responses tab

The toolbar indicates the total number of responses, and provides tools to enable you to adjust the settings, create and edit banners, print and export the report.

- The report may include a large number of questions. To save time, those questions lower down on the page will be loaded as you scroll down to them.
- A Question Navigator field in the upper-left corner of the page allows you to find particular questions, show or hide questions in the report, and re-order the questions (see The Question Navigator on page 232 for more information).
- Each question has an icon beside the question text to indicate the type of question. For example indicates a single question, indicates a multi question and indicates a numeric question.
- A Chart icon for each question displays the data for that question in chart format (see The Chart on page 234 for more information).
- A filter allows you to specify a date range for interview start, and which interview statuses are to be displayed (see The Filter Area on page 245 for more information).

10.1.2.2.1. The Question Navigator

Click in the Question Navigator to display a list of all the questions in the report.

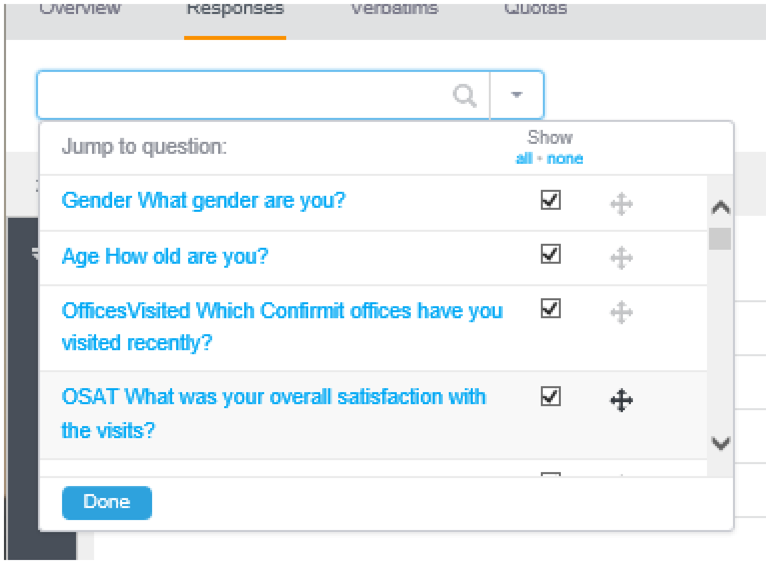


Figure 282 Example of the Question Navigator

- Scroll to and click on a question in the list to jump to that question in the report.
- Type a text string into the search field to reduce the question list to only those questions that contain the text string in the question id, then click on the desired question to jump to it.

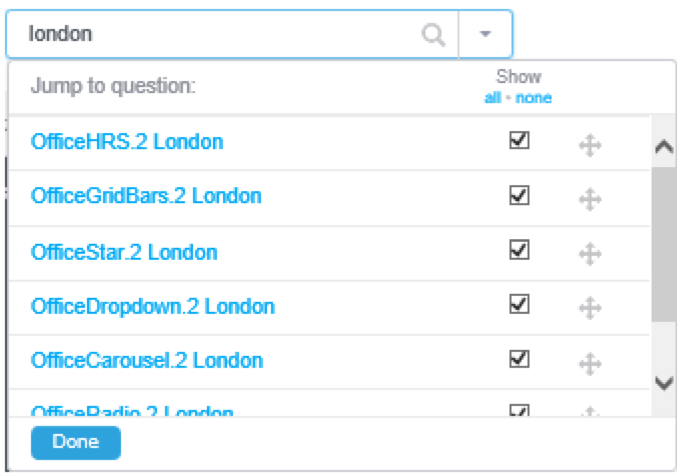


Figure 283 Using the question search field

- To show or hide questions in the report, select or deselect the questions in the Show column. You can select or deselect all the questions simultaneously by clicking **all** or **none** respectively.
- Rearrange the order of the questions in the report by clicking on the ✥ icon for a question and dragging it to the desired position.

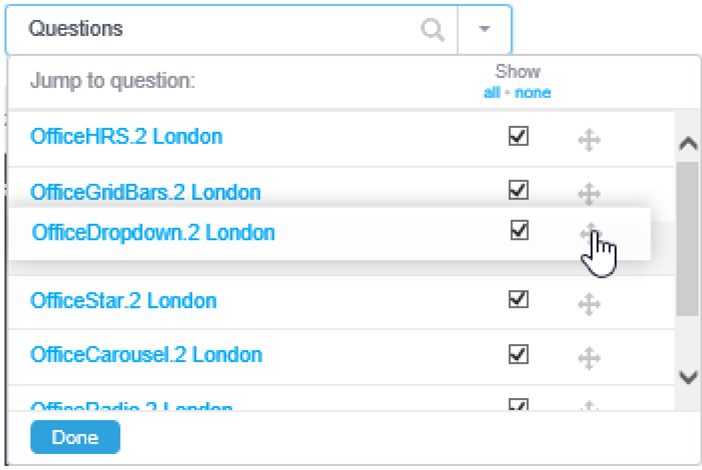


Figure 284 Changing the order of the questions in the report

On completion, click **Done** or click outside the Question Navigator to close the field.

10.1.2.2.2. The Chart

Click on the Chart icon for a question to display the data for that question as a chart. This will by default be presented in pie-chart format, but if a banner has been used then it will be in bar-chart format.

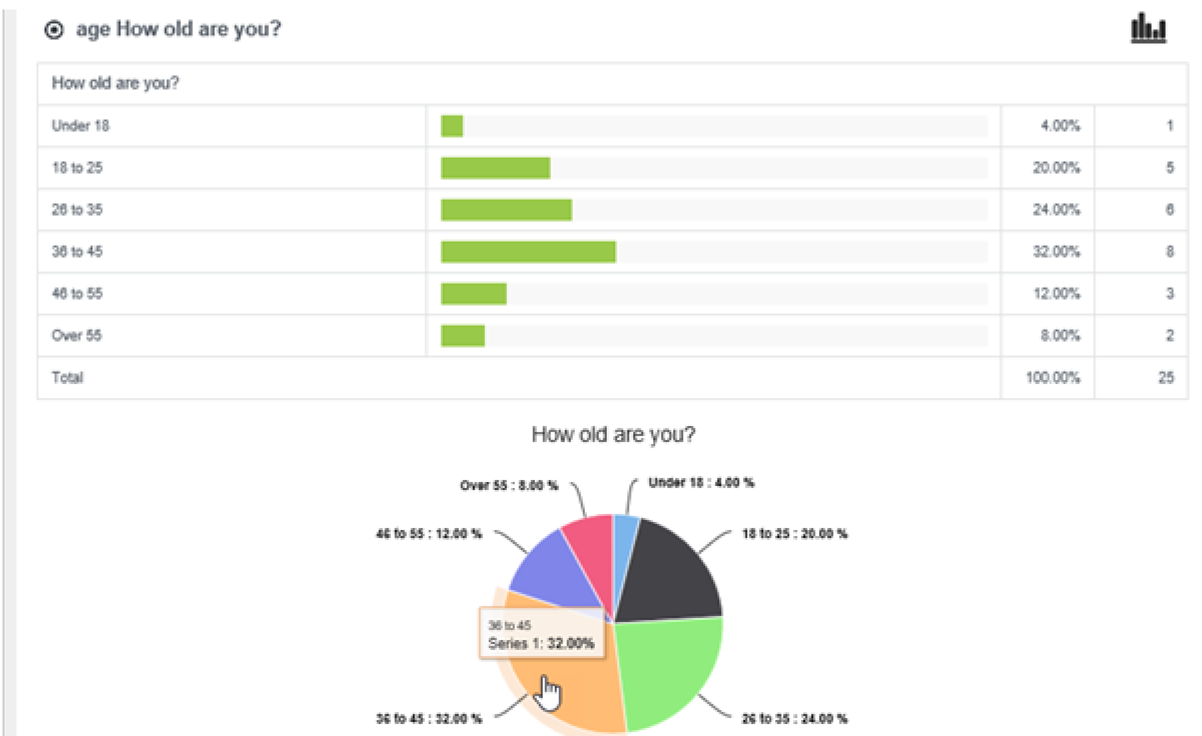


Figure 285 Example of a pie chart for a question

- Hover the mouse pointer over a segment of the chart (or its label) to show the details of that segment. As you move the pointer to a different segment the details will change.

- Click in a segment to "extract" that segment from the chart and display the details. You can now move the pointer anywhere in the chart and the details will display for the selected segment. Click again in the segment to "replace" the segment into the pie chart.

10.1.2.2.3. Settings

The Settings menu allows you to apply rating statistics, significance testing, select whether you show the results as counts, percentages or both, and show or hide the totals.

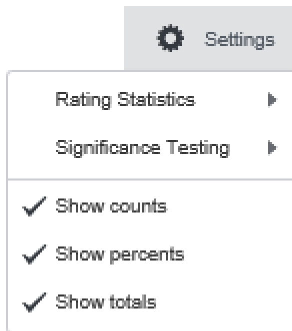


Figure 286 The Settings options

If the survey has a weight model for use with the IA report (the model must be named IAWeight), then the option **Show weighted data** will also be available in the menu (see Weighting in Instant Analytics on page 246 for more information). If no IA weight model is available, the menu option will not be listed.

Rating Statistics allows you to show only the specified number of elements in the table. For example, if you select Top 2, only the top 2 elements will be displayed, or if you type 5 in Top N, only the top 5 elements will be displayed. The other elements will be removed from the table.

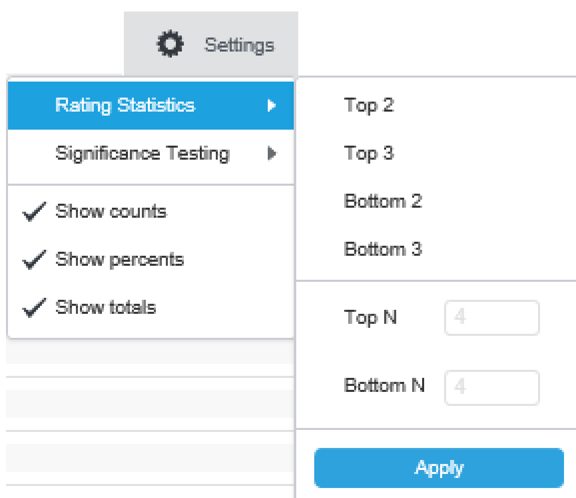


Figure 287 The Rating Statistics options

You can also perform Significance Testing on the results - select **Significance Testing** and choose a suitable confidence level. The higher the confidence level, the more certain you can be that there really is a difference in the two groups being tested. For example, 90% confidence means that there is a 10% chance that a difference in scores could have been found purely through the effects of sampling.

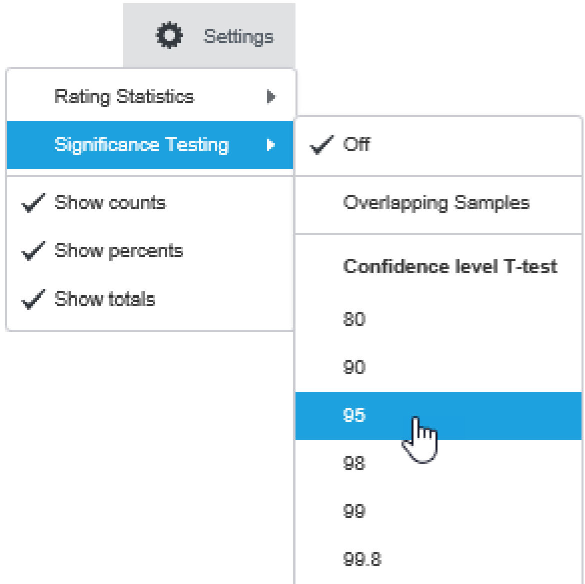


Figure 288 Selecting a confidence level

Most of the statistical tests are based on standard t tests that assume that the two samples being compared are independent of each other. When the columns of a table are formed from the categories of a multi question, data from the same case can be present in both of the columns being tested. This is known as overlapping data, and it means that the two samples cannot be considered independent. Overlapping Samples should be used when the columns to be tested contain data that are not independent. A separate algorithm “Choi-Stablein” should then be used to calculate the significance test.

The settings in this menu will be maintained in saved reports and exports. Once the functionality is enabled and a banner is applied to create a table, Significance Testing will automatically highlight applicable table cells in green, and letters will indicate the comparable columns. Note that this feature uses the same column proportional T-test as Reportal, but is limited to a single level of confidence.

Check or uncheck the options as required. Note that you must have at least one of the counts and percents options checked; you cannot uncheck both.

10.1.2.2.4. How to Create a Banner

A banner is a collection of segments where each segment makes up a column in the results tables. You create a banner in the Responses tab. You can create one banner in Instant Analytics, and if you chose to use the banner then it will be used for all the questions in the Responses tab.

1. Click the **Banner** button, then click **Edit banner**.

   The Edit banner overlay opens.

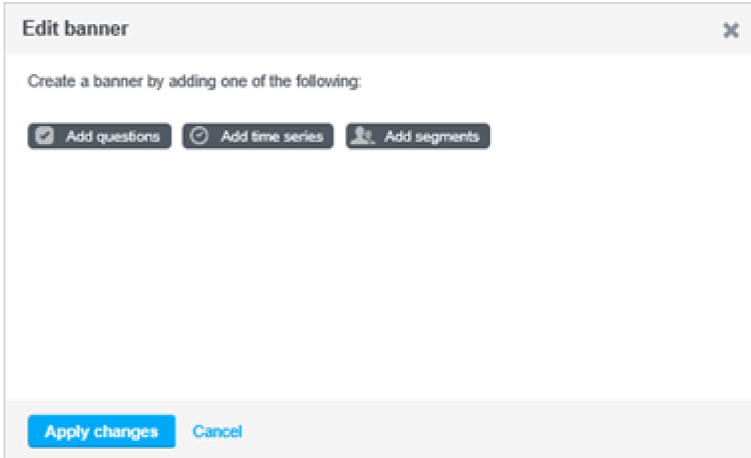


Figure 289 The Edit banner overlay

You can create the banner by adding questions or time series.

To add questions:

2. Click **Add questions**.

   A list of the questions in the survey is displayed.

3. Click on those questions you wish to add to the banner to check the boxes beside the questions.

   The icons located between the check-boxes and the questions indicate the type of question; radio button for a single question, a tick for a multi question.

4. On completion click **Add to banner**.

To add a time series:

1. Click **Add time series**.

   The Add time series overlay opens.

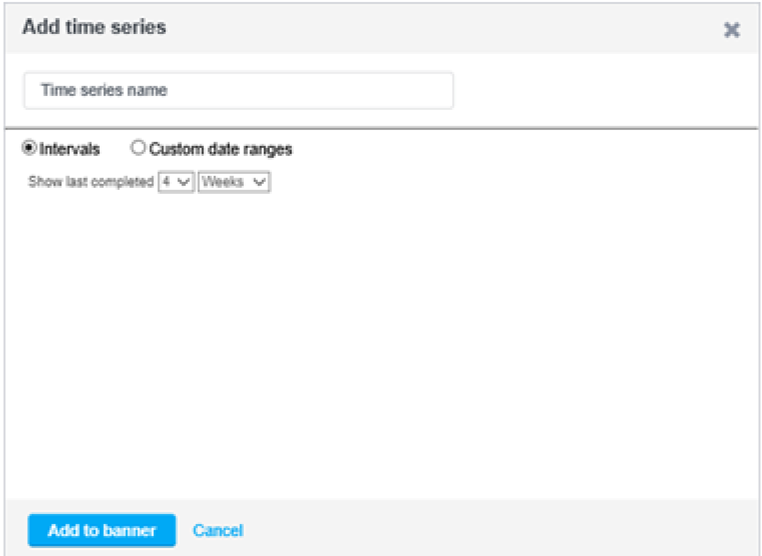


Figure 290 Adding a time series to the banner

2. Type a name for the time series into the field.
3. Select **Intervals** (select thereafter Weeks or Months and the appropriate value) or **Custom date ranges** (add a label if required and select thereafter the dates to be used). Note that you can add as many date ranges as necessary.
4. On completion click **Add to banner**.

To add a segment:

A segment is a filtered criteria comprising a combination of answers that match a particular target group, for example Males aged 25-44 who earn over $50,000. You can create segments within Instant Analytics, save these segments, and then add them to banners when performing analysis in the Responses tab. These segments will then be available to any user of the Instant Analytics report.

1. Click **Add segments**.

   The Add segments overlay opens.

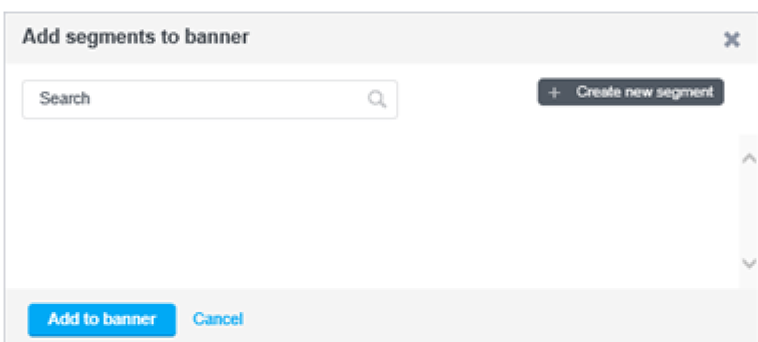


Figure 291 Adding a segment to the banner

   Any existing segments are listed. Here you can edit, duplicate or delete them, and create new segments.

2. Click **Create new segment**.

The Create segment overlay opens.

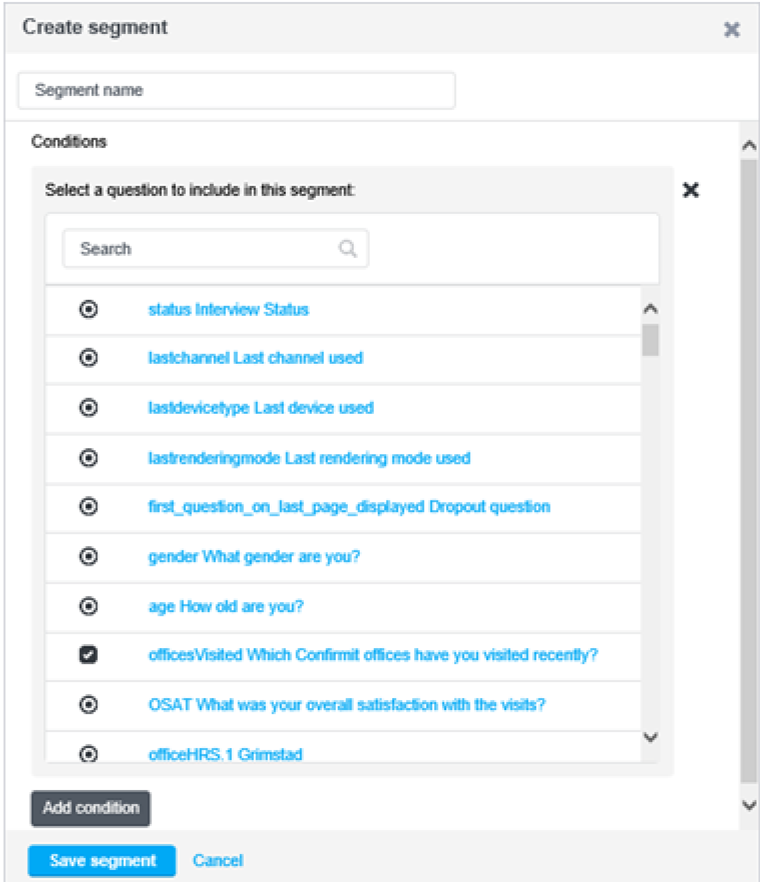


Figure 292 The Create segment overlay

All the questions in the survey are listed. In this example we will create a segment to select for male respondents between the ages of 26 and 45.

3. Type a name for the new segment into the Segment name field - in this example **Male26to45**.
4. Select a question to add to the segment - in this example the Gender question.
5. The responses available for the selected question are listed.

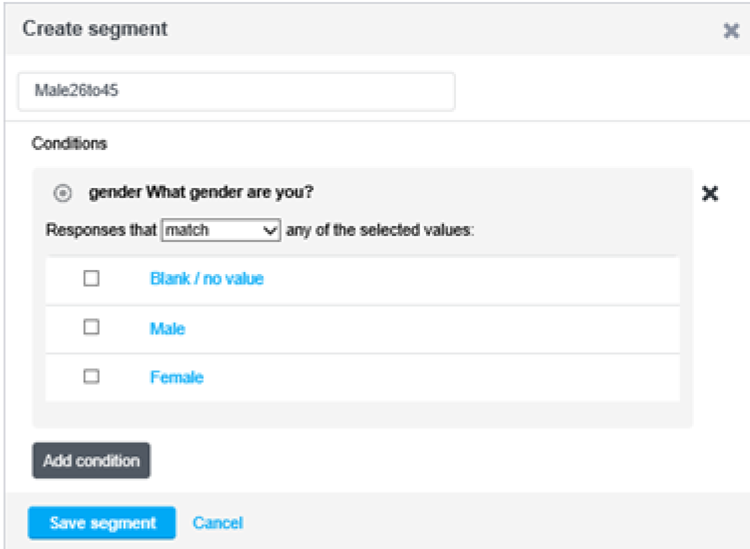


Figure 293 The Create segment overlay with the responses for the Gender question

6. Select the appropriate value(s).
7. Select whether you want the condition to match the selected values or not match them.
8. Click **Add condition**.

   The condition is added to the segment, and the question list re-opens allowing you to select additional questions as required. In this example you would now select the Age question.

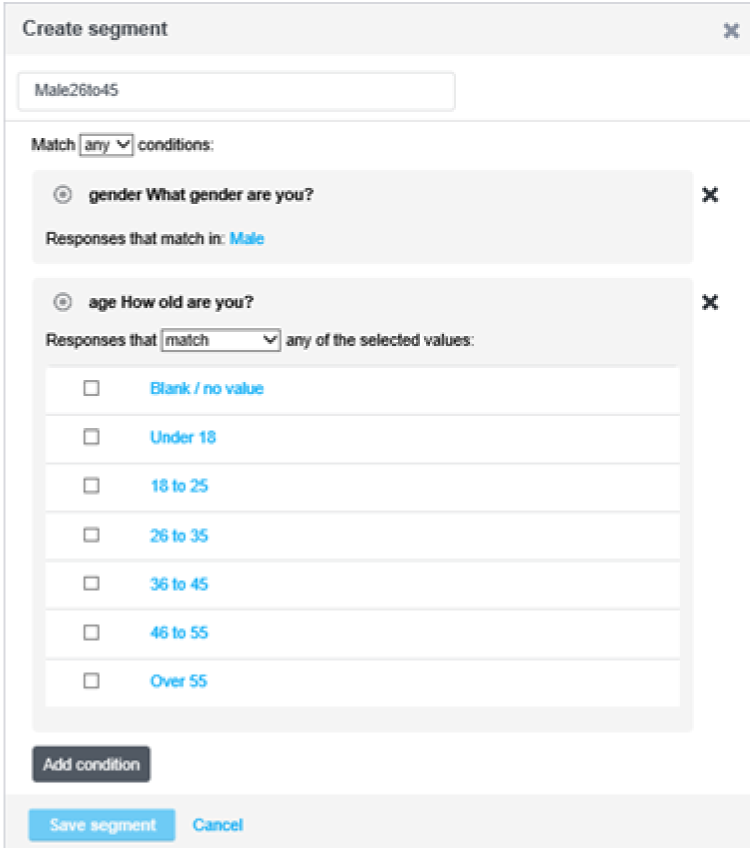


Figure 294 The Create segment overlay with the responses for the Age question

9. Again, select the appropriate values (for this example check the boxes for 26 - 35 and 36 - 45), and select whether you want the condition to match the selected values or not match them.
10. Assuming you now have the required conditions in the segment, click **Save segment**.

    Note that you can add as many questions to the segment as necessary.
11. Once you are ready to add the segment(s) to your banner, in the Add segments to banner overlay, select the segment(s) you wish to add and click **Add to banner**.

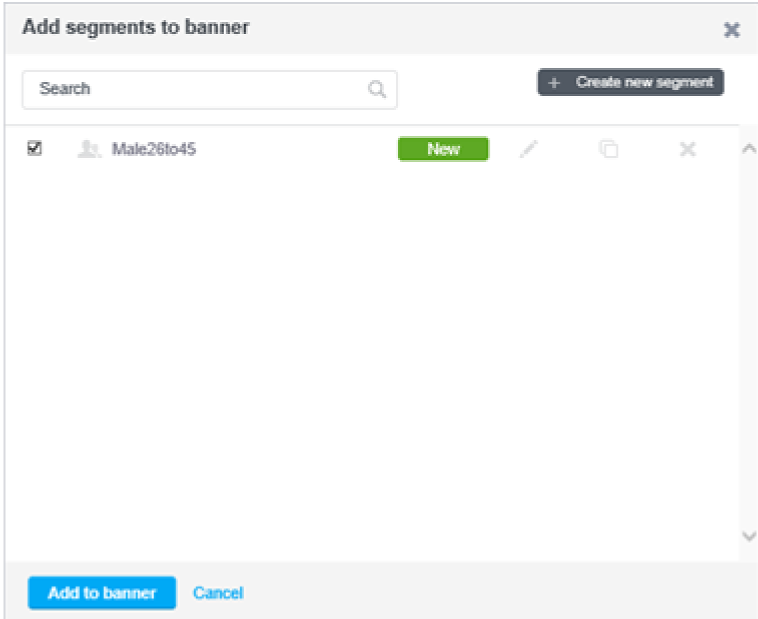


Figure 295 Adding the segment to the banner

Confirming

The Edit banner overlay changes to a confirmation dialog. Here you can nest columns if necessary, re-order the questions you have selected for the banner, or remove them from the banner.

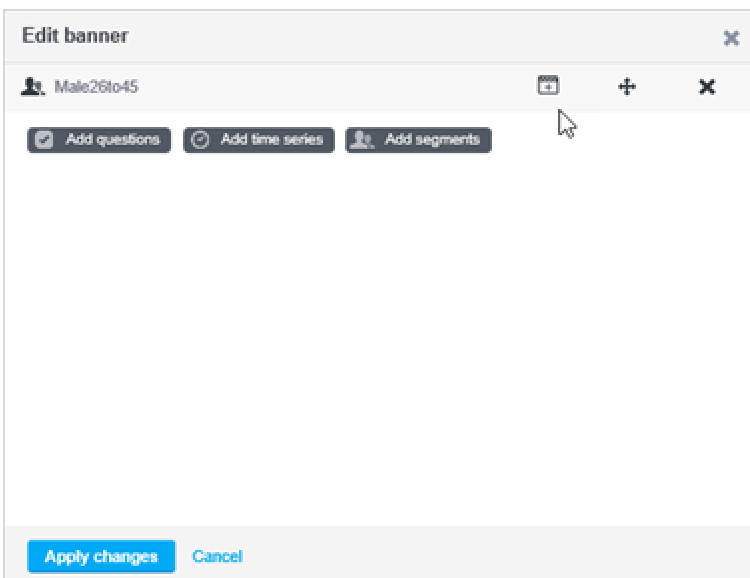


Figure 296 Editing and applying the banner

12. To nest a question, click the **Nest** icon then select **Add question**, **Add time series** or **Add segment**.
13. To reorder the questions, click on the **Reorder** icon and drag the question to the desired location.

    Note that any questions that are nested within the question you are dragging will be moved along with the question you are dragging.

14. To add additional questions or time series, click the appropriate button and repeat the procedure above.
15. To remove a question from the banner, click the **X** icon for that question.
16. On completion, click **Apply changes**.

10.1.2.3. The Verbatims Tab

If the survey includes verbatim questions (Open text), then the Verbatims tab is available. This tab lists all the verbatim questions along with the answers given for each.

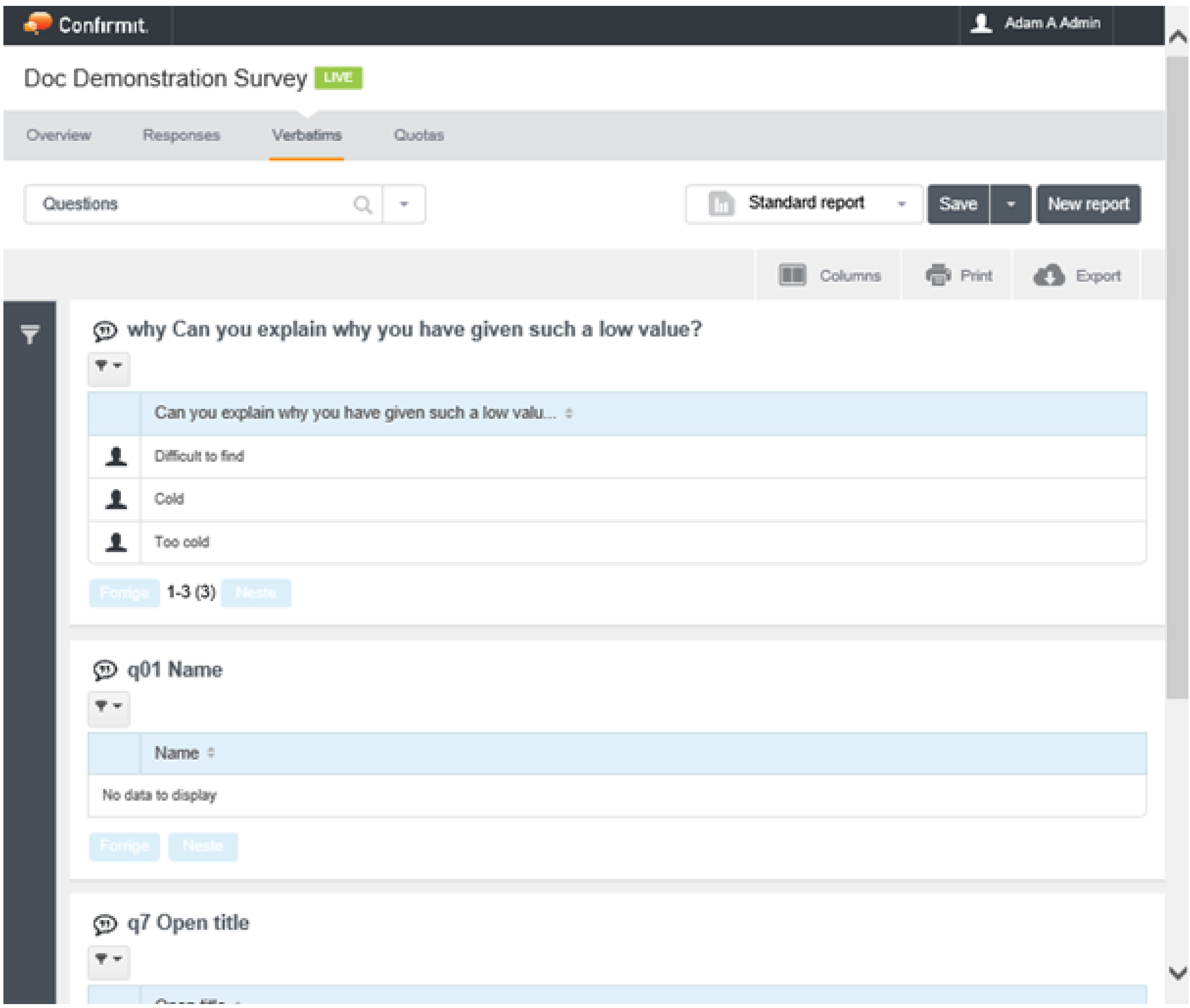


Figure 297 Example of the Verbatims tab

- A filter allows you to specify a date range for interview start, and which interview statuses are to be displayed. If a filter is applied, click **Clear all** to remove the filter and re-display the entire list of questions.
- You can also filter the answers provided for each question (see The Filter Area on page 245 for more information).

10.1.2.3.1. Columns

You can display the individual responses for selected questions. Click the Columns icon to open a list of the columns available to be displayed. Select the columns you wish to use. By default, only the Interview Start column will be available. To make other columns available:

1. In the Design page, for each question you wish to add as a column, go to the question and open its Properties list.
2. Type __**VERBATIM_COLUMN** onto the Question Category field.

Note: Type two underscore characters first, then use all upper case.

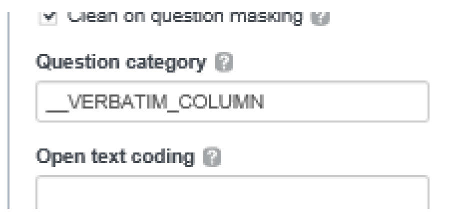


Figure 298 Setting a question to be available in the Columns list

3. Launch the survey, thereby updating the Instant Analytics Report.

   This question will then be available for selection in the Columns list.

   If you wish to add a question as both a column and a filter (see The Filter Area on page 245 for more information), use a semi-colon between the categories, i.e. **__VERBATIM_COLUMN;__FILTER**.

10.1.2.4. The Quotas Tab

The Quotas tab gives an overview of the quotas used in the survey, with details of limits, counts, remaining (limit - count) and percentage achieved.

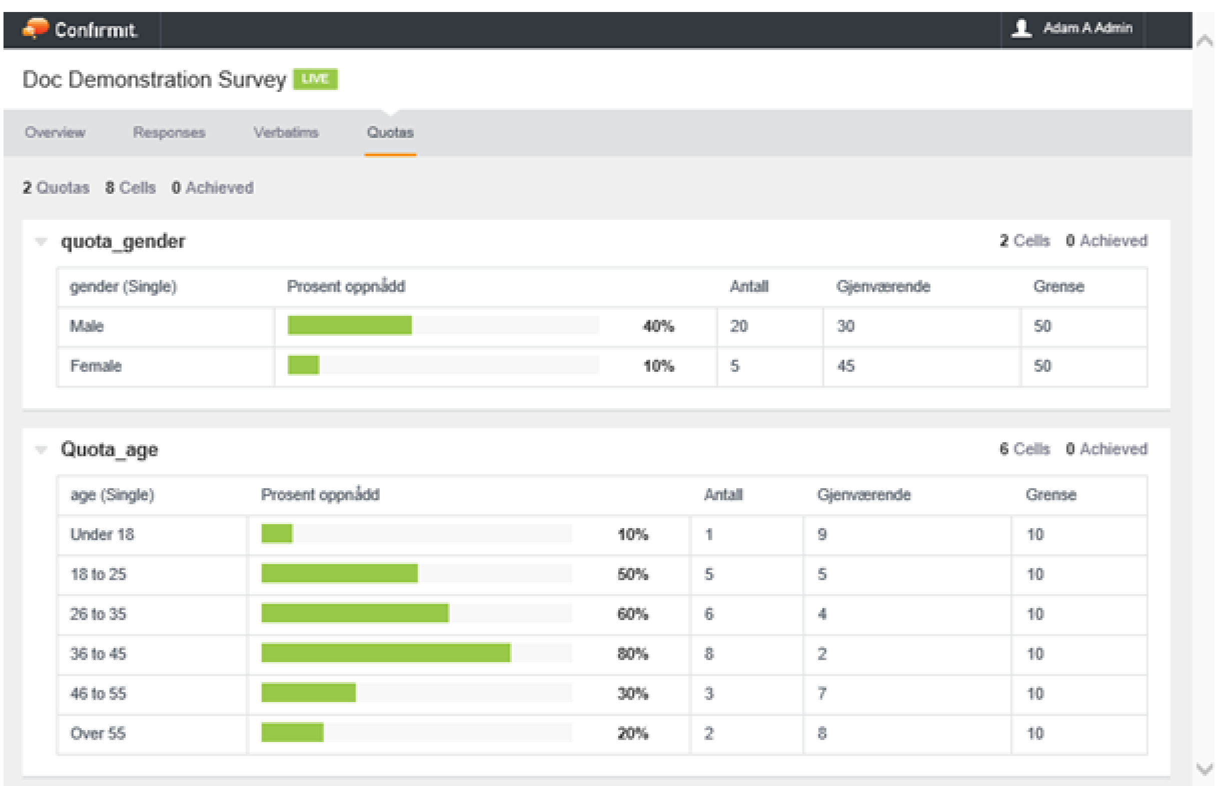


Figure 299 Example of the Quotas tab

- The top row in the tab gives the number of quotas in the survey, the total number of quota cells, and the number of quotas that are currently achieved.
- For each quota in the survey is then displayed a breakdown of the individual categories by cells.
- Each quota can be collapsed as necessary to simplify viewing - click the open/close arrow button beside the quota name.

10.1.2.5. The Filter Area

By default the Responses and the Verbatims pages include two filters; the Interview Start date and the Interview Status, to enable the user to filter the data presented on those pages.

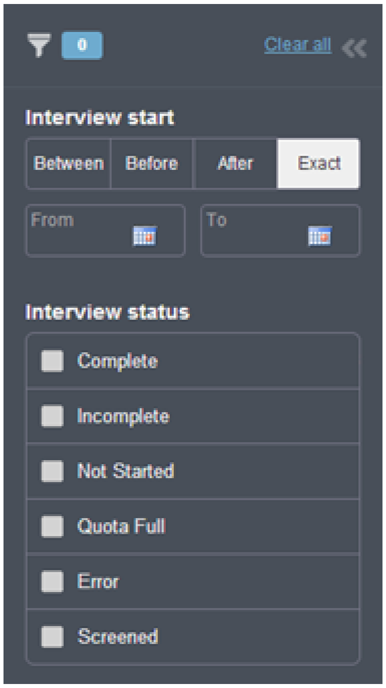


Figure 300 The data filter available on the Responses and Verbatims pages

- Select the desired Interview Start filter type, then select the From and To dates as required, and/or check the boxes for the desired Interview Statuses.

The data presented in the report is updated as you change the filter criteria. If no filter selections are made then all the available data will be presented. Once a filter selection is made, only the data that satisfies the filter criteria will be presented.

The number of filters currently active is shown in the top-left corner of the filter panel.

You can add additional filters to the pages. To do this:

1. In the Design page, for each question you wish to add as a filter, go to the question and open its Properties list.
2. Type **__FILTER** onto the Question Category field.

Note: Type two underscore characters first, then use all upper case.

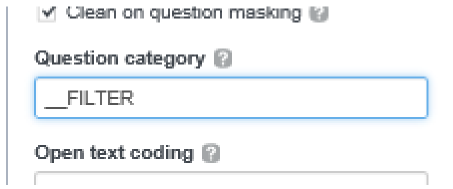


Figure 301 Setting a question to be available as a Filter

3. Launch the survey, thereby updating the Instant Analytics Report.

   This question will then be available as a filter.

   If you wish to add a question as both a filter and a column (see Columns on page 243 for more information), use a semi-colon between the categories, i.e. **__FILTER;__VERBATIM_COLUMN**.

10.1.2.6. Weighting in Instant Analytics

You can apply weighting to the data presented in the Instant Analytics report to adjust the data presented in the report such that it reflects the "real world" situation. IA will only support one weight model, and this must be specially created and named for IA. In the IA report, the weighting will only be applied to the data displayed in the Responses tab. When the report is initially opened, the default setting will be that no weighting is applied to the data.

Note: You must be in Professional Authoring to set up Weighting.

To create a weight model for use with Instant Analytics:

1. With the survey open in Professional Authoring, go to the **Reporting > Weighting** menu item.

   The Weight Model List page opens.

2. Create a new weight model (refer to the separate Professional Authoring User Guide for details), and name the model **IAWeight**.

Important
The Instant Analytics functionality will only recognize the weight model if the model is named correctly. Only the name of the weight model can be IAWeight; the weight model ID must be different and must be in all lower case. If you also use the weight model name as the weight model ID then an error will be generated.

3. After setting the weight model up as required, launch/re-launch the survey.

To apply the weight model to the data in the report:

1. Open the IA report and go to the Responses tab.
2. Go to the **Settings** menu.

   If the survey has a weight model for use with the IA report (the model must be named IAWeight), then the option **Show weighted data** will be available in the menu. If no IA weight model is available, the menu option will not be listed.

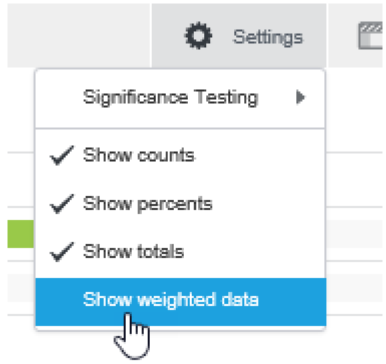


Figure 302 The Settings menu when a weight model is available

3. Select the **Show weighted data** option.

   The report is updated and the weighted data is displayed.

You can save the weighted and unweighted versions of the report under different names. To do this, display the data as required (weighted or unweighted), click the down-arrow beside the **Save** button, select **Save As** and give the report a suitable name.

10.1.3. Saving a Report and Creating a New Report

The Responses and the Verbatims pages contain a report selection field, and buttons allowing you to save the current report under a new name and also create a new report.

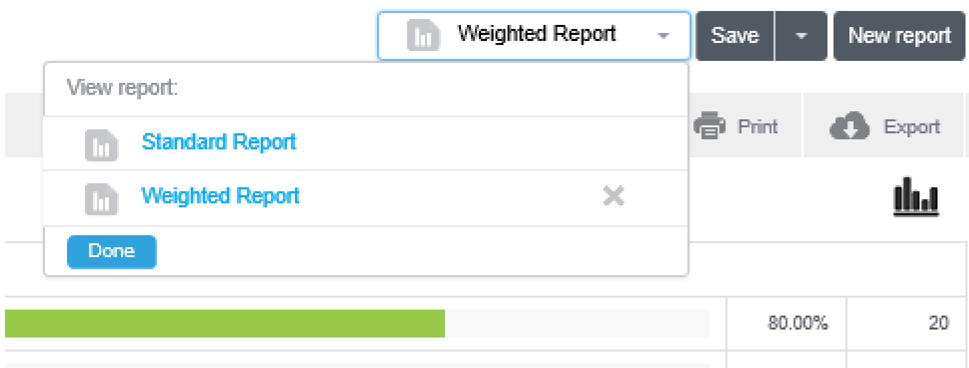


Figure 303 The Report selection, Save and New report buttons

Note that if you save the report under a new name, all you are doing is changing the name of the report. The data displayed, the layout and the access permissions for the report will remain as set.

Using the filter (see The Filter Area on page 245 for more information) you can select the data you wish to be presented (for example, completed interviews that were started between certain dates), then click **New Report** to save the report with that data as a separate report. The new report will then be listed in the Report Selector field, and can be viewed, printed and exported as required. You can set access permissions for that report. Note that the data presented will be updated while the survey is live.

10.1.4. Additional Functionality

Several of the tabs have additional functionality; for example you can print out or export data from the Responses and Verbatims tabs, create banners in the Responses tab and select columns to be displayed in the Verbatims tab.

10.1.4.0.1. Print

You can print out the response charts and verbatims from the Instant Analytics report.

1. Using the Questions navigator towards the upper-left corner of the page, check/uncheck and rearrange the questions as necessary to achieve the report layout you need (see The Question Navigator on page 232 for more information).
2. In the menu bar, click **Print**.

   A standard printer selection dialog opens.
3. Make the printer settings as required.
4. Click Print.

10.1.4.1. Export

You can export the data from the Responses and Verbatims tabs. To do this, click the **Export** button 

located towards the right end of the tabs' menu bar. Currently you can select to export to Excel. On selection of the format, a "Do you want to open or save..." message box appears towards the lower edge of the window; select Open or one of the Save... options as desired.

11. Appendix A - Limits

Respondent data

The question types and their limits are as listed below:

- **Open text** - Unlimited
- **Open text with field width specified in properties** - Limited to the number of characters specified
- **Numeric** - 38 digits

Note: Excel has a display limit of 15 digits for numbers, so if a numeric question larger than this is exported to Excel then the numbers will be rounded and displayed in exponential notation. This is an Excel limitation so cannot be controlled by Confirmit. Two viable work-arounds are available here:
- Export the file as a text file and then import it to Excel in text format.
- If the numeric question is shown on a hitlist within Reportal, exporting the hitlist will result in the limitation. In this case, change the question type to Open text in Authoring, re-launch the survey and force the BitStream files.

- **Coded questions (single, multi and grid)** - 32 characters (default), but field width up to 40 characters may be set
- **Multi with open text property** - (same as open text)
- **Numeric List** - (same as Numeric)
- **Other specify-element ("other" property set in answer list)** - Unlimited
- **Loop** - (same as coded questions)

Note: The respondent table has a maximum limit of 1024 columns. However users should not exceed 900 columns as Confirmit also has a varying number of system-derived respondent columns and in subsequent releases may add to these. If the total column count exceeds 1024 the survey launch will fail.

Meta data

- **Question title** - 255 characters
- **Question text** - 32767 characters
- **Question instructions** - 32767 characters
- **Answer/scale texts** - 2000 characters
- **Question ids** - 50 characters
- **Codes** - 32 characters (default). Only alphanumeric characters and underscore (_), no white space. The survey administrator can increase this limit to a maximum of 50 characters for individual questions (the Field Width property in the Question Properties sheet). Note that this maximum will not be a problem for single questions, however problems will arise during launch if grid and/or multi questions use the full 50-character codes - see the note below.

Note: In the database, the column headers are constructed as a combination of the question id and the code, and are limited to 50 characters. If this limit is exceeded for a header, then an error message will be displayed when you attempt to launch the survey. Care must therefore be taken when allocating codes for grid and multi questions if the code maximum has been increased above its default setting.

Scripts/masks

- **Script nodes** - 32767 characters
- **Validation code** - 32767 characters
- **Masks (code mask, scale mask, column mask)** - 255 characters

Recoded variables

Same as for ordinary question types, except for the extra element

- **Expression** - Unlimited

Respondent list

- **Values uploaded in the respondent list** - 255 characters

Data Processing

The service supports various data processing operations:

1. Data Processing Rules
2. Data Central Server Rules.
3. A data export/import wizard, which initiates Data Processing and Data Central Server rules.

Although Confirmit has designed the Service to handle the data processing strain generated by the most advanced activity of its clients, extreme use may cause performance issues or errors. Confirmit shall not be held responsible for issues relating to extreme use. The definition of "extreme use" will depend the data processing operations performed and the volumes of data being processed. The volume will be a factor of the number of records, number of variables, variable types and how densely populated the data is (i.e. how may of the data cells that have values). The following are general guidelines on the limits for the various data processing tasks, based on data sets of different sizes:

For data processing operations involving data sets with up to 100 variables:

- Data sets run through Data Central Server Rules (including SPSS export) should be limited to 750 000 records.
- Data sets run through Data Processing Rules (including Triple-S and delimited text export/import) should be limited to 1 000 000 records.

For data processing operations involving data sets with up to 1000 variables:

- Data sets run through Data Central Server Rules (including SPSS export) should be limited to 75 000 records.
- Data sets run through Data Processing Rules (including Triple-S and delimited text export/import) should be limited to 100 000 records.

For data processing operations involving data sets with up to 2000 variables:

- Data sets run through Data Central Server Rules (including SPSS export) should be limited to 37 500 records.
- Data sets run through Data Processing Rules (including Triple-S and delimited text export/import) should be limited to 50 000 records.

Translator

- The number of categories and/or scales that can be viewed in the translator interface is limited to 1300 per scale/answerlist.

Archiving

When using the Database Cleanup task, a report with a single datasource is soft-deleted a preset number of days after the survey is archived. For SaaS users in the Confirmit servers this is set to 14 days. For On-Premise users, the system administrator can adjust the system setting DaysToKeepSurveyDatabasesForDeletedProjects as required.

12. Appendix B - Language Codes

Important
Custom languages that are added to a server after the initial release of Confirmit Horizons are assigned a language code number automatically, based on the order in which the languages are added to the server. Custom languages may therefore have different language IDs for each installation of Confirmit (On-Premise, SaaS Euro, SaaS US, Saas Aus). Therefore, be aware that if you intend to export/import surveys between the different environments (On-Premise/Euro/US/Aus) and you are using custom languages, you should check the relevant language codes for the sites and edit the XML export files as appropriate.

For each installation; go to the Home > Help > Language Overview menu command to view a list of the languages, with their applicable codes, available on that server.

The texts and messages presented to users and/or respondents are translated into a number of "standard" languages. These are listed in the Language Selector overlay in the Overview page (see The Languages Area on page 45 for more information). The language codes used in Survey Designer are as listed in the table below:

Language code	Language	Sub-name	Combident
54	Afrikaans		af
28	Albanian		sq
1	Arabic		ar
5121	Arabic	Algeria	ar_al
15361	Arabic	Bahrain	ar_ba
3073	Arabic	Egypt	ar_eg
2049	Arabic	Iraq	ar_iq
11265	Arabic	Jordan	ar_jo
13313	Arabic	Kuwait	ar_ku
12289	Arabic	Lebanon	ar_le
4097	Arabic	Libya	ar_li
6145	Arabic	Morocco	ar_mo
8193	Arabic	Oman	ar_om
16385	Arabic	Qatar	ar_qa
1025	Arabic	Saudi Arabia	ar_sa
10241	Arabic	Syria	ar_sy

Language code	Language	Sub-name	Combident
7169	Arabic	Tunisia	ar_tu
14337	Arabic	U.A.E.	ar_ua
9217	Arabic	Yemen	ar_ye
43	Armenian		hy
77	Assamese		as
44	Azeri		az
2092	Azeri	Cyrillic	az_cy
1068	Azeri	Latin	az_la
45	Basque		eu
35	Belarusian		be
69	Bengali		bn
517	Bosnian		bo
2	Bulgarian		bg
3	Catalan		ca
4	Chinese		zh
3076	Chinese	Hong Kong SAR, PRC	zh_hk
5124	Chinese	Macau SAR	zh_ma
34820	Chinese	Mandarin	zh_mn
2052	Chinese	PRC	zh_pr
32772	Chinese	Simplified	zh_sm
4100	Chinese	Singapore	zh_si
1028	Chinese	Taiwan	zh_ta
31748	Chinese	Traditional	zh_cht
33796	Chinese	Traditional_old	zh_tdo

Language code	Language	Sub-name	Combident
518	Croatian		hr
5	Czech		cs
6	Danish		da
19	Dutch		nl
2067	Dutch	Belgium	nl_be
1043	Dutch	Netherlands	nl_nl
9	English		en
3081	English	Australia	en_au
10249	English	Belize	en_be
4105	English	Canada	en_ca
9225	English	Caribbean	en_cb
6153	English	Ireland	en_ir
8201	English	Jamaica	en_ja
5129	English	New Zealand	en_nz
13321	English	Philippines	en_ph
33801	English	Somali	en_so
7177	English	South Africa	en_sa
32777	English	Tagalog	en_tg
11273	English	Trinidad	en_tr
2057	English	United Kingdom	en_gb
1033	English	United States	en_us
12297	English	Zimbabwe	en_zi
37	Estonian		et
56	Faeroese		fo

Language code	Language	Sub-name	Combident
41	Farsi		fa
11	Finnish		fi
12	French		fr
2060	French	Belgium	fr_be
3084	French	Canada	fr_ca
5132	French	Luxembourg	fr_lu
6156	French	Monaco	fr_mo
1036	French	Standard	fr_fr
4108	French	Switzerland	fr_sw
514	Gaelic		gd
55	Georgian		ka
7	German		de
3079	German	Austria	de_au
5127	German	Liechtenstein	de_li
4103	German	Luxembourg	de_lu
1031	German	Standard	de_de
2055	German	Switzerland	de_sw
8	Greek		el
513	Greenlandic		gl
71	Gujarati		gu
13	Hebrew		he
57	Hindi		hi
14	Hungarian		hu
15	Icelandic		is

Language code	Language	Sub-name	Combident
33	Indonesian		id
32801	Indonesian	Bahasa	id_ba
1057	Indonesian	Indonesia	id_id
16	Italian		it
1040	Italian	Standard	it_it
2064	Italian	Switzerland	it_sw
17	Japanese		ja
75	Kannada		kn
96	Kashmiri		ks
2144	Kashmiri	India	ks_in
63	Kazak		kk
520	Khmer		kh
33288	Khmer	Cambodian	kh_kc
87	Konkani		ki
18	Korean		ko
2066	Korean	Johab	ko_jo
1042	Korean	Korea	ko_ko
38	Latvian		lv
39	Lithuanian		lt
2087	Lithuanian	Classic	lt_cl
1063	Lithuanian	Lithuania	lt_lt
47	Macedonian		mk
62	Malay		ms
2110	Malay	Brunei Darussalam	ms_br

Language code	Language	Sub-name	Combident
1086	Malay	Malaysian	ms_ms
76	Malayalam		ml
515	Maltese		mlt
88	Manipuri		ma
78	Marathi		mr
97	Nepali		ne
2145	Nepali	India	ne_in
20	Norwegian		no
1044	Norwegian	Bokmål	no_bo
2068	Norwegian	Nynorsk	no_ny
72	Oriya		or
516	Pashto		ps
33284	Pashto	Afgan	ps_af
34308	Pashto	Deewa	ps_dw
21	Polish		pl
22	Portuguese		pt
1046	Portuguese	Brazil	pt_br
2070	Portuguese	Standard	pt_st
70	Punjabi		pa
24	Romanian		ro
25	Russian		ru
79	Sanskrit		sa
26	Serbian / Croatian		sr
1050	Serbian / Croatian	Croatian	sr_yu

Language code	Language	Sub-name	Combident
3098	Serbian / Croatian	Cyrillic	sr_cy
2074	Serbian / Croatian	Latin	sr_la
89	Sindhi		sd
519	Sinhalese		si
27	Slovak		sk
36	Slovenian		sl
526	Sotho	Sesotho	st
10	Spanish		es
11274	Spanish	Argentina	es_ar
16394	Spanish	Bolivia	es_bo
13322	Spanish	Chile	es_ch
9226	Spanish	Colombia	es_co
5130	Spanish	Costa Rica	es_cr
7178	Spanish	Dominican Republic	es_dr
12298	Spanish	Ecuador	es_eq
17418	Spanish	El Salvador	es_el
4106	Spanish	Guatemala	es_gu
18442	Spanish	Honduras	es_ho
2058	Spanish	Mexican	es_me
3082	Spanish	Modern Sort	es_ms
19466	Spanish	Nicaragua	es_ni
6154	Spanish	Panama	es_pa
15370	Spanish	Paraguay	es_pa
10250	Spanish	Peru	es_pe

Language code	Language	Sub-name	Combident
20490	Spanish	Puerto Rico	es_pr
1034	Spanish	Traditional Sort	es_es
14346	Spanish	Uruguay	es_ur
8202	Spanish	Venezuela	es_ve
65	Swahili		sw
29	Swedish		sv
2077	Swedish	Finland	sv_fi
1053	Swedish	Sweden	sv_sv
73	Tamil		ta
68	Tatar		tt
74	Telugu		te
30	Thai		th
31	Turkish		tr
34	Ukrainian		uk
32	Urdu		ur
2080	Urdu	India	ur_in
1056	Urdu	Pakistan	ur_pa
67	Uzbek		uz
2115	Uzbek	Cyrillic	uz_cy
1091	Uzbek	Latin	uz_la
42	Vietnamese		vi
512	Welsh		cy
521	Zulu		zu

SaaS only:
Confirmit has added some extra languages to the SaaS installation. On-Premise customers may also have additional languages set up on their servers, but the language codes and combidents may well differ from these.

13. Appendix C - Reserved Keywords

During the launch of a survey or when generating the database for a Professional Panel, a validation is conducted to check if any reserved Confirmit or JScript keywords have been used as Question IDs. As a result of this validation process either a warning will be displayed (when launching a survey in Survey Designer) or the task will be aborted (when generating the database for a Professional Panel survey).

The following Reserved Keywords must not be used as Question IDs:

Note: These Keywords are not case-sensitive, so for example neither "ANY" nor "any" can be used as a Question ID. Question IDs can however start with these character strings (except underscore _), so for example "Anyone" can be used.

The Underscore (_) character. I.e. a question ID must not start with _ .

A	else	L (except for use under special conditions	recoding
abstract	enum	lastchannel	respid
action	env	lastcomplete	responseid
aggregated	eq	lastdevicetype	return
all	extends	lastrenderingmode	rid
and	false	last_handled	right
any	FilterStatus	last_touched	rolling
avg	FilterStatusDate	le	round
between	FilteredBySurveyId	long	rowguide
boolean	final	loopstate	S
break	finally	lt	sample_category
by	FirstEmailedDate	native	select
byte	float	ne	short
C	floor	never_again	smtpstatus
callback	for	new	source_projectid
case	function	none	source_responseid
caseid	ge	noofemailssent	state
catch	goto	not	static
CatiExtendedStatus	group	not_in_quota	status
__channels__	gt	notin	string
char	id	null	super
class	if	or	switch
combined_sourceid	implements	order	synchronized
comment	import	package	this
con	in		throw

conn	instanceof	page	throws
const	int	panelid	to
contains	interface	PanelistCreatedDate	todate
continue	interview_end	panelistid	transient
convert	interview_end_time	PanelistModifiedDate	tries
count	interview_start	private	true
createddate	interview_start_time	projectid	try
date	interviewer	protected	typeof
datebetween	interviewerid	public	unique_sourceid
debugger	in_use	PValDate	var
default	isfalse	PValInHier	void
delete	istrue	PValNum	volatile
DialType	iterationid	PValStr	while
do	its	PValStrArr	with
double	l (except for use under special conditions	question R	

The following can only be used in respondent lists:

userid

password

language

The following cannot be used with a Contact DB:

ContactId

ValidPeriod_From

ValidPeriod_To

IsCurrent

Modified

Created

If the following are used as question ids, issues will arise when generating BitStream files. These should therefore not be used if reporting or sampling with BitStream files:

AUX	COM1	LPT1
CON	COM2	LPT2
NUL	COM3	LPT3

PRN	COM4 COM5 COM6 COM7 COM8 COM9	LPT4 LPT5 LPT6 LPT7 LPT8 LPT9

(These are all supported by SmartHub/Reporting Data).

The iPhone and Android phone layout JavaScript depends on the class name "question" for identifying the container div to be changed when paging through questions. If anything with the class "question" is added to a survey, it will break touch rendering mode. The CSS class name "question" is therefore a reserved word.

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