Confirmit Survey Designer User Guide

Confirmit Horizons v21

This is document revision 2 of the Confirmit Horizons v21 Survey Designer User Guide published in January 2017. The information herein describes Confirmit Horizons Survey Designer and its features as of Build nr. 21.0.1352. 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?

- The Design Page section is edited (see The Design Page on page 28 for more information).
- The text and illustration in The Survey Column section are edited (see The Survey Column on page 29 for more information).
- The Audio Upload section is added to the Design Page chapter (see The Audio Upload Object on page 46 for more information).
- The Video Upload section is added to the Design Page chapter (see The Video Upload Object on page 47 for more information).
- The text in the Page Break Node section is edited (see The Page Break Node on page 54 for more information).
- The text in the Directive Node section is edited (see The Directive Node on page 55 for more information).
- The Text Formatting Toolbar section is added to the Editing an Object section (see The Text Formatting Toolbar on page 63 for more information).
- Several property descriptions are added to the various Question Properties sections (see Question Properties on page 67 for more information).
- The Table Lookup Questions section is added to the Question Properties section (see Table Lookup Questions on page 80 for more information).
- The Hierarchy Questions section is added to the Question Properties section (see Hierarchy Questions on page 81 for more information).
- The text and illustrations in the Conditions sections are updated (see Conditions on page 91 for more information).
- The Advanced options properties are added to the Options Tab section in the Launching the Survey chapter (see The Options Tab on page 116 for more information).
- The text in the Email Content Tab section is edited (see The Email Content Tab on page 117 for more information).
- The Previewing your Email section is added to the Email Management section (see Previewing Your Email on page 119 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 will allow you to quickly and easily create surveys at all levels of complexity 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 will need to log in to Confirmit Authoring to access the Survey Designer functionality anyway, and at this stage of development you will also need to use the Authoring functionality to perform much of the more complicated survey design work and setup. So to ensure you have full coverage of all the Authoring and Designer functionality, this documentation should be read in conjunction with the Confirmit Authoring User Guide.

1.1. Saving Changes

When you make changes within Survey Designer, an icon 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 you do not need to save changes manually, so there is no **Save** button in the system.

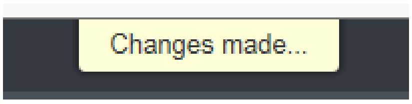


Figure 1 The Changes made icon

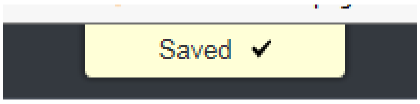


Figure 2 The Saved icon

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.

If you wish to undo changes, go to the Designer log and use the Undo Change functionality available there (see The Designer Log on page 12 for more information).

1.2. 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.

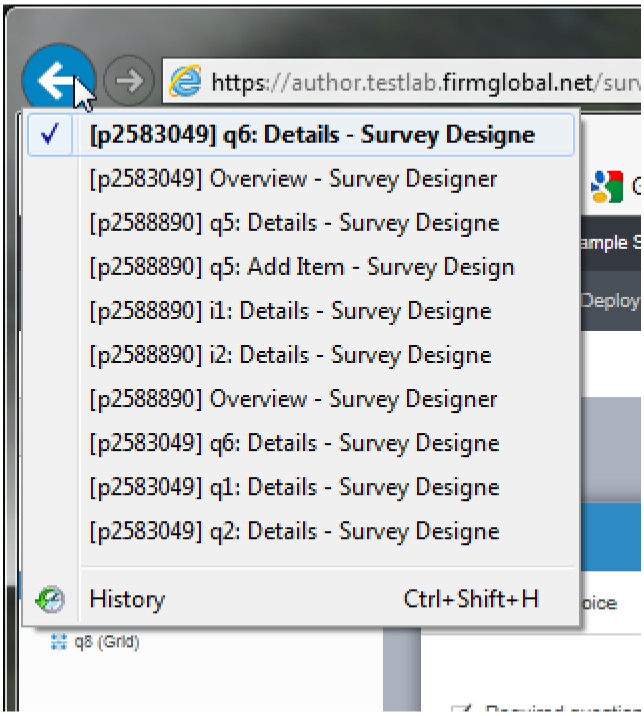


Figure 3 Accessing the history list

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 Authoring Quick Access pane, a new window opens in your browser and you are taken to the Surveys list in the Survey Designer application. This page lists all the surveys you have access to. You can filter the list and search for specific surveys (see Searching and Filtering the List on page 5 for more information), and you can sort the list as you wish (see Sorting the List on page 5 for more information).

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

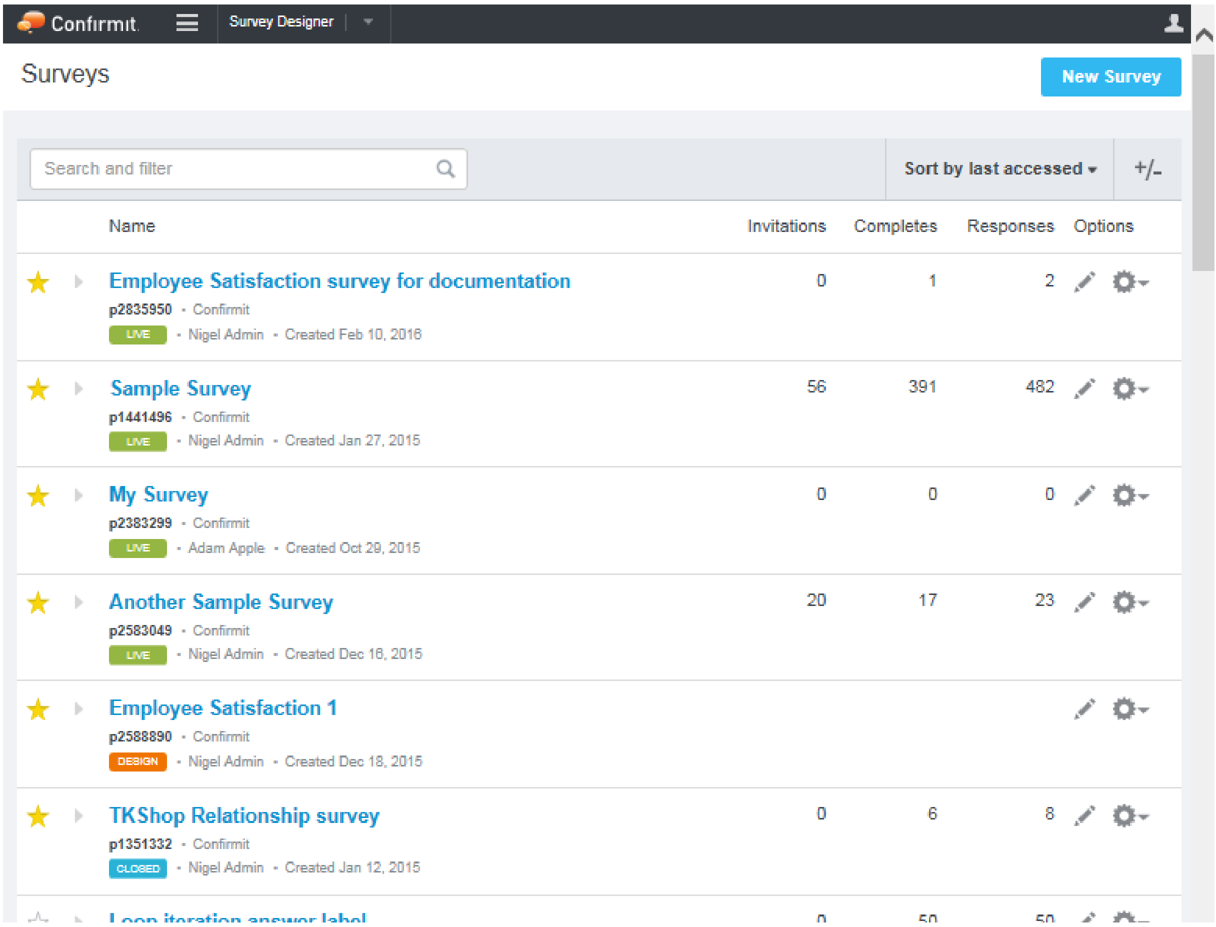


Figure 4 The new Surveys list layout

Click a blue survey name link to open that survey (see The Design Page on page 28 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 Invitations, Completes and Responses 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.

The “hamburger” button in the toolbar next to the Confirmit logo is always available and provides access to all the other Confirmit applications to which you have access. Click the button to open a selection overlay with links to the applications.

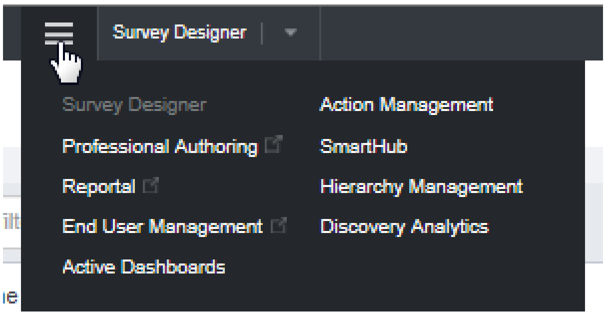


Figure 5 Accessing other applications via the "hamburger" button

Links with an "arrowed-square" icon open Authoring or Reportal, links without the icon take you directly to the selected application.

The **Survey Designer** button (in the main toolbar) is also always available and returns you directly to the Surveys list.

2.1. The List Details

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

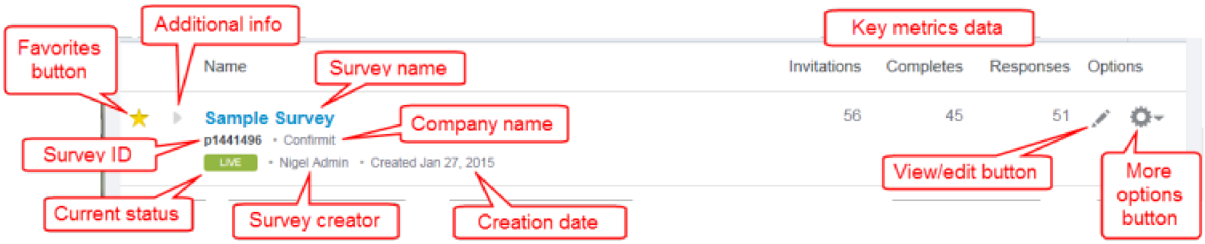


Figure 6 Example of an item from the Survey List

- **Survey name -** the name given to the survey when it was created. You can edit the name in the Overview page.
- **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 Survey Status on page 11 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 toggle the Favorites designator on and off. Favorites allows you to more easily identify specific surveys in the Survey List, and also allows you to sort the list such that for example "favorite" surveys are placed at the top.
- **Additional info -** expands the row in the list and displays additional information about the survey.

- **Key metrics data -** three columns of data are provided for immediate viewing; Invitations - the number of email invitations that have been sent out, Completes - the number of complete responses that are registered for the survey, and Responses - the number of respondents who have started the survey (this will include completes and all forms of incompletes including quota stops, errors etc.) 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.
- **View/edit button -** click to open a new browser window with the survey open in the Designer page.
- **More Options icon -** 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.

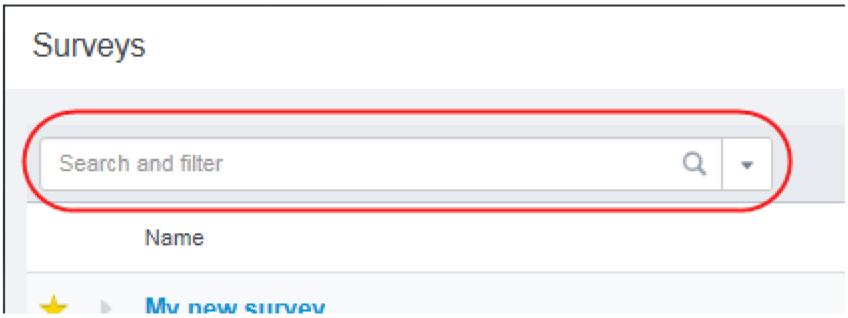


Figure 7 The Search and filter field

Start typing a text string into the Search field, and as you type the Surveys list will be filtered such that it only holds the surveys where the survey name contains that text string. Note that the text string can appear anywhere in the survey name. 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..

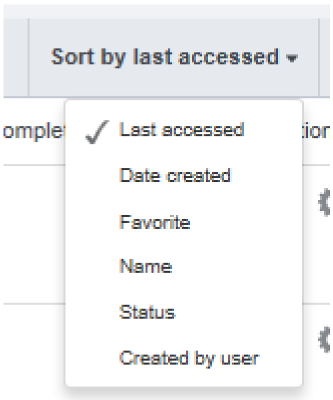


Figure 8 The Sort by... menu

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 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.

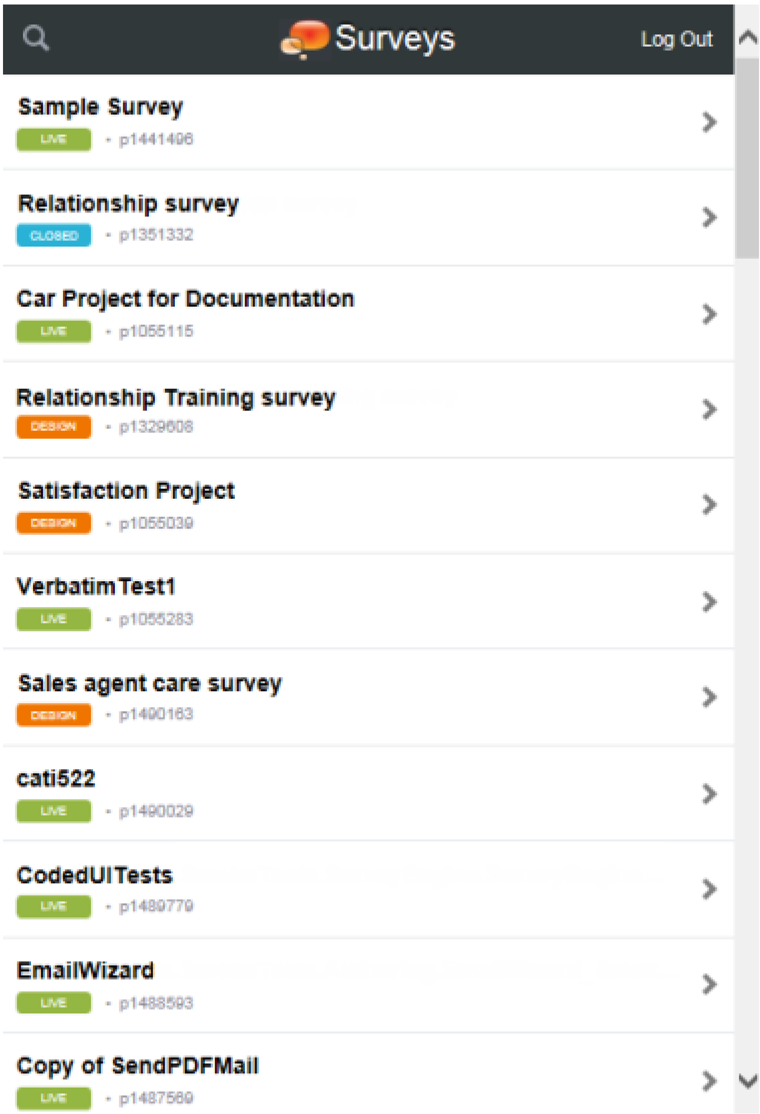


Figure 9 The survey list on a small screen

- 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.
- Click the **>** icon for a survey to open the Overview page for that survey.

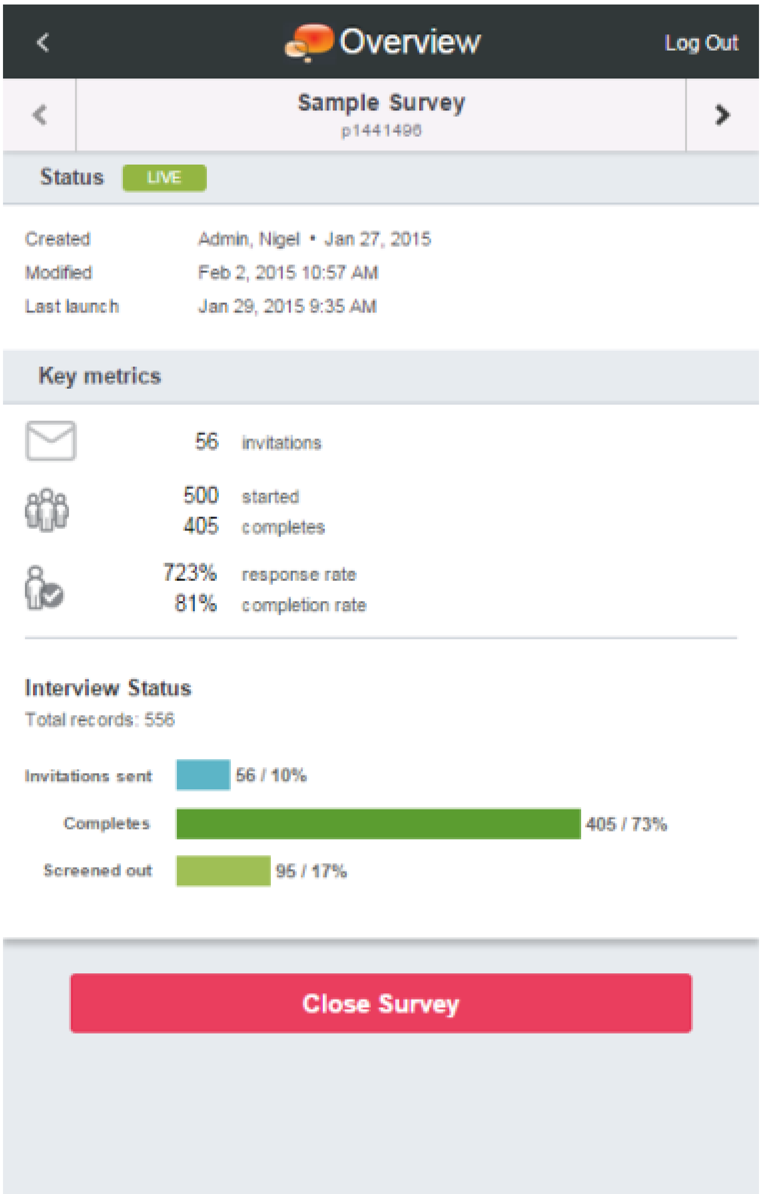


Figure 10 The Overview page on a small screen

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

2.5. The Recent Projects Menu

The **Recent Projects** 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.

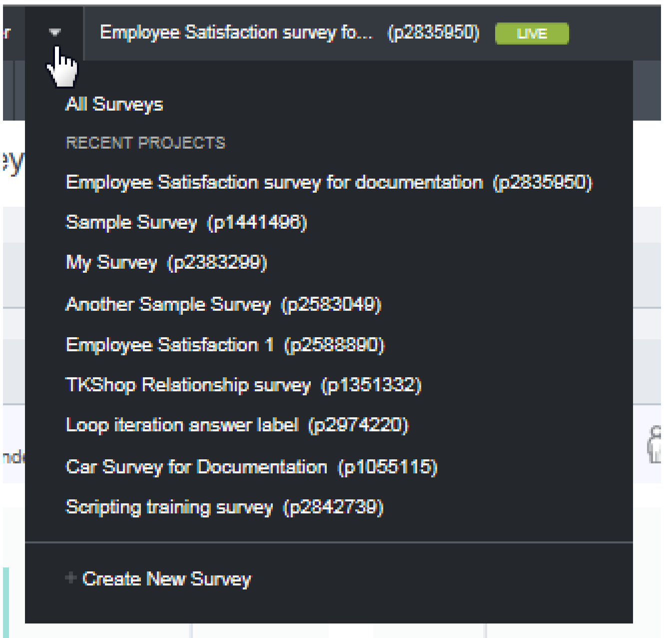


Figure 11 Example of the Recent Projects menu

2.6. The User Menu

In the upper-right corner of the Survey Designer window 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.

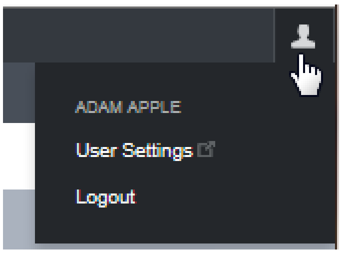


Figure 12 The User Menu button and menu

2.6.1. 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 the user logs in to Confirmit, their profile will be accessed and the settings used to set up the system for that particular user. On initial registration default settings will be used, but you can go in your profile at any time and edit the majority of the settings as you require.

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

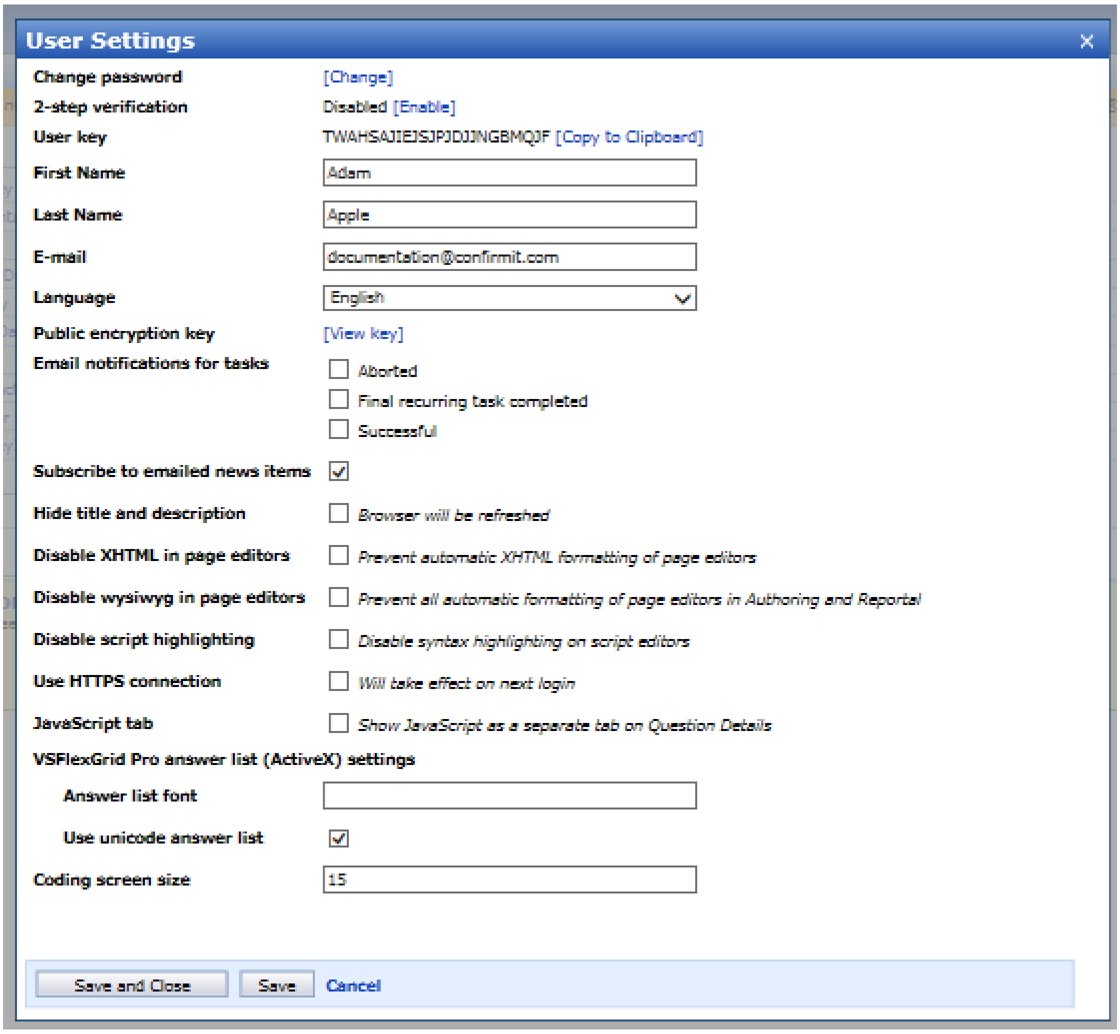


Figure 13 Example of the User Settings window

The properties and fields are as follows:

- **User name –** user login name. In combination with a password, this user name will log the user on to the Confirmit application.
- **Change password –** click the link to open the Change Password dialog.
- **2-step verification -** an optional additional security measure that requires Google Authenticator™ in addition to your username and password when you log into your Confirmit account.
- **User key –** unique to each user. To make yourself “visible” to Confirmit users outside your organization, you will have to supply them with your user key. (This is really a security issue.) To copy the key, click the Copy to clipboard link.
- **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 Confirmit message system to send messages to the Confirmit users. This is also the default email address where requested report and export files are sent. This field can be left empty.
- **Language –** the user’s preferred language. This is the language that will be used when previewing questions and reports. This is important to note when working with multilingual surveys.
- **Public encryption key -** set public key.
- **Email notifications for tasks -** you will be sent notification emails when specific events occur:

  o **Aborted –** you are sent a notification email when a task is aborted (export, import, etc.).

- o **Final recurring task completed -** you are sent a notification email when a recurring task has run for the last time.
- o **Successful –** [not Standard user] you are sent a notification email on the successful completion of each task.

- **Subscribe to emailed new items -** when checked, the user will receive news items as emails.
- **Hide Title and Description –** when enabled, this setting will remove the header on top of the Authoring interface containing titles and descriptions of the page you have open. This will allow more space on the page when working in the Authoring environment.
- **Disable WYSIWYG in page editors** - check to disable all automatic formatting of the editors (including XHTML editing). Components can still be inserted by dragging them from the toolbox or right-clicking in the editor.
- **Disable script highlighting -** a syntax highlighter is enabled by default in all areas where scripts can be written. This includes script nodes, masking and validation scripting. If the BETA CodeCompletion component is not enabled, this syntax highlighting will be used. Check “Disable script highlighting” to disable the syntax highlighting.
- **Use HTTPS connection –** users can select whether or not Authoring is to run on an HTTPS connection. Select or de-select this property as required, log off Confirmit and then log in again to effect the change. Note that this property can also be set at site and/or company level, the priority being Site, Company, User. Any level can select to use HTTPS, but if a higher level is set to use it then it will be mandatory for all lower levels.
- **JavaScript tab -** check to show the JavaScript tab in the Question Details page for relevant question types.
- **Display standard user menus -** when the user has permissions for both Survey Designer and Standard user, check/uncheck this box to toggle between the two menu sets.
- **Answer list font –** if required, specify the font to be used for the entries in the Answers list. This field will usually remain empty, however in cases where for example Chinese is to be used, you must specify a font that supports the Chinese character set, for example SimSun, PmingLiu or Arial Unicode MS. A font must be specified here when “Use Unicode Answerlist” is selected, or when the default font does not support the language used when you edit the answers in the ActiveX answerlist (FlexiGrid) editing mode.
- **Use Unicode answer list –** active by default. When editing answer lists and scales in Survey Designer, you can choose between an HTML list and using a plug-in called FlexiGrid, which gives an Excel-like interface. There are two versions of this component: One which supports Unicode and can be used with Windows XP, Windows 2000 and Windows NT, and one that does not support Unicode and can be used with Windows 95, 98 and ME. You can select which version to use in your User Settings.
- **Coding Screen Size –** specify the number of answers that will be shown on the Coding Window screen. This number will also be specified on the back and forward buttons, for example **Prev 10** or **Next 10**.

2.6.2. 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.

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.

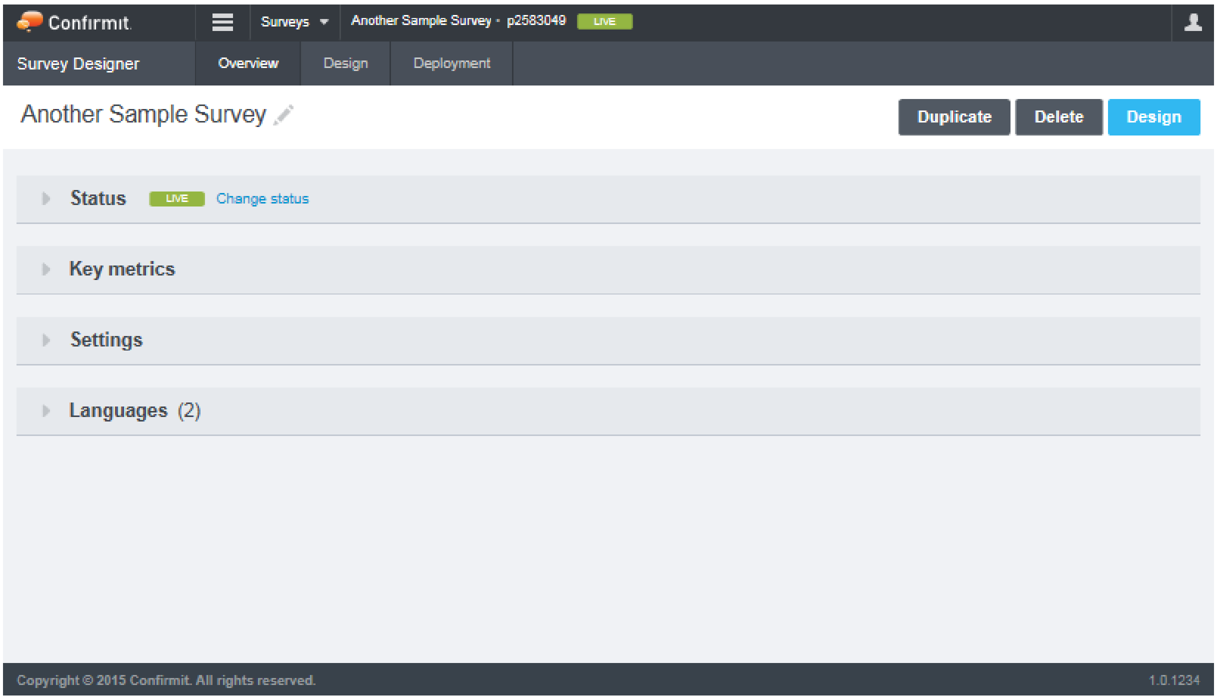


Figure 14 Example of the Overview page for a survey

- To change the name of the survey, click the **Edit** icon beside the survey name and type in the new name.
- **Duplicate -** creates a duplicate of the current survey (see Duplicating a Survey on page 26 for more information).
- **Delete -** deletes the current survey (see Deleting a Survey on page 27 for more information).
- **Design -** opens the Survey Design page.
- **Status tab -** indicates the current status of the survey (see Survey Status on page 11 for more information).
- **Key Metrics tab -** displays the important survey data (see The Key Metrics Area on page 14 for more information).
- **Settings tab -** allows you to view and edit the survey settings (see The Settings Area on page 15 for more information).
- **Languages tab -** allows you to view and edit the survey's language settings and links (see The Languages Area on page 25 for more information).

3.1. Survey Status

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 12 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.

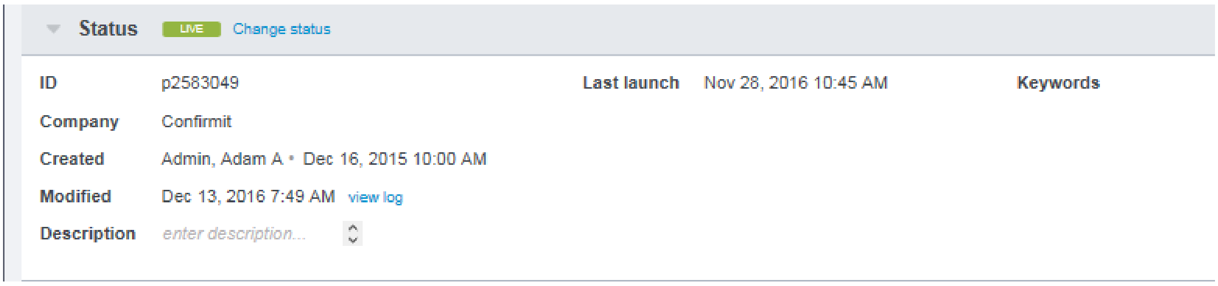


Figure 15 The status icon on the Overview page Status tab

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.
- **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 12 for more information).

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.

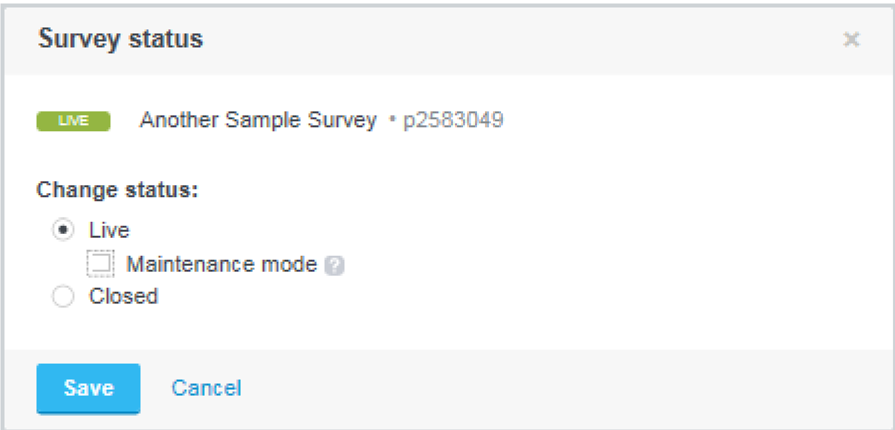


Figure 16 The Survey Status overlay

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.

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).

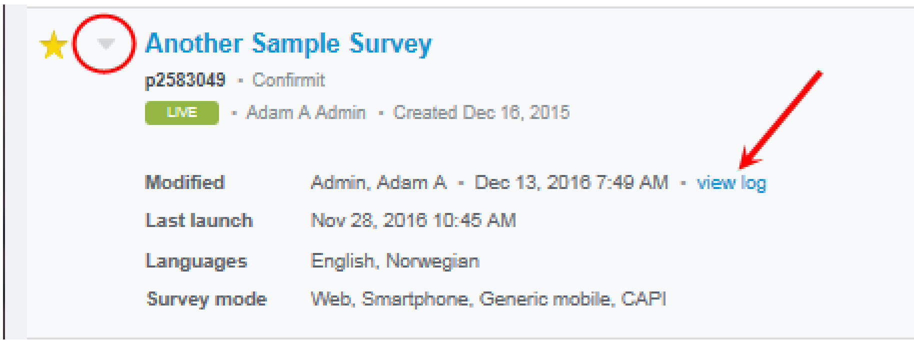


Figure 17 The expand icon and the log link

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

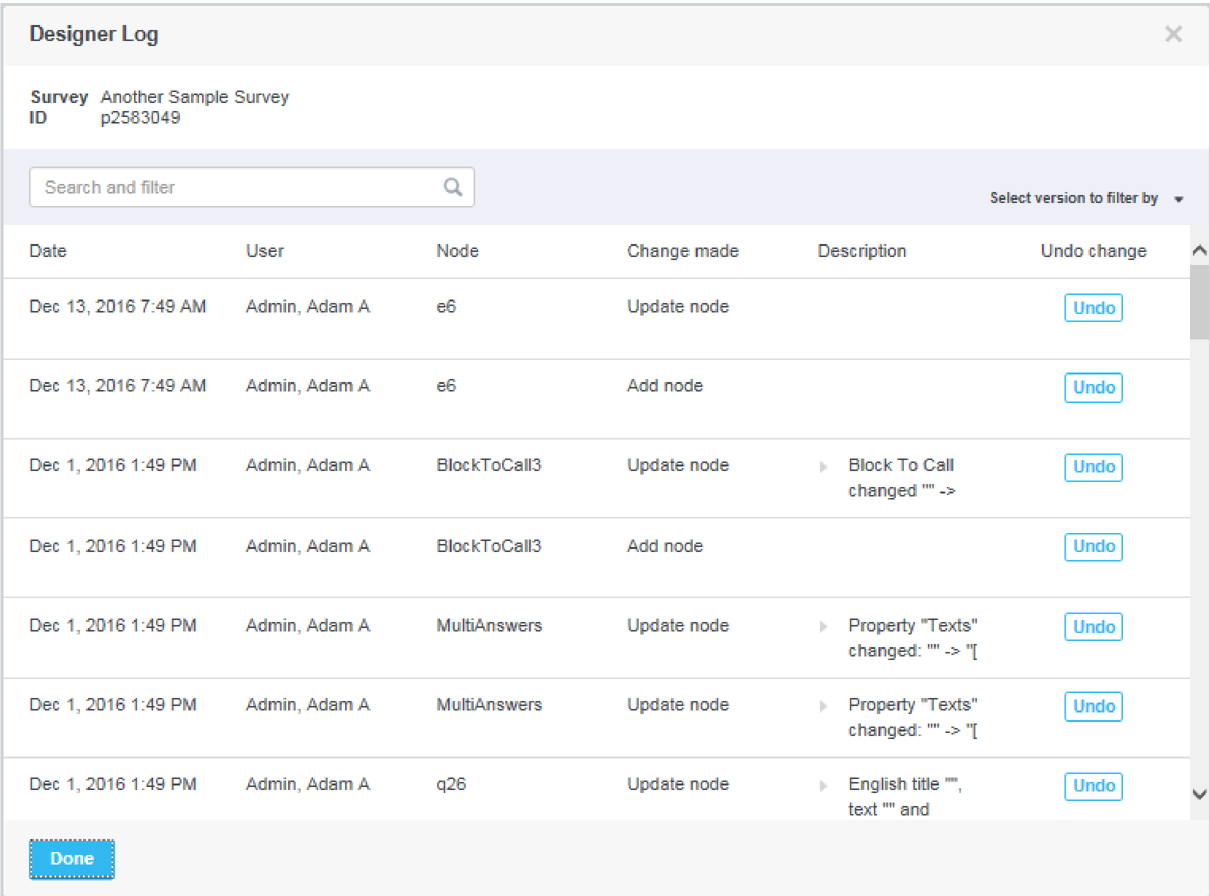


Figure 18 Example of part of the designer log for a survey

Changes to the survey such as additions, deletions and changes to parameters, can be undone (see Undoing a Change on page 13 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.

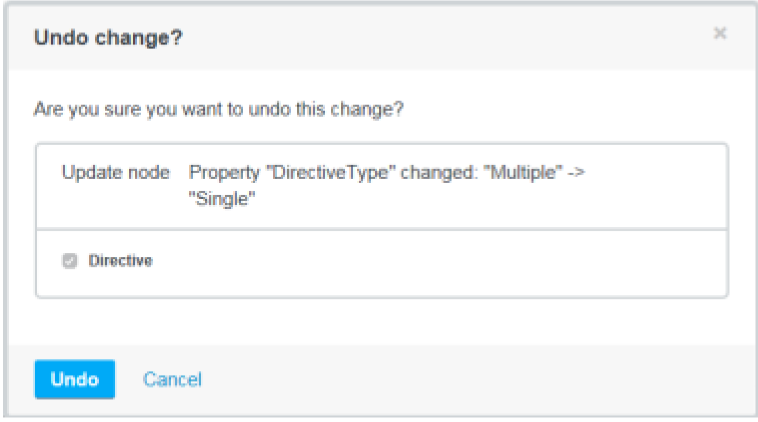


Figure 19 The Undo Change overlay

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 20 Example of the Key Metrics area

The metrics displayed here include:

- The date the last response was received.

- o The total number of respondents who have replied.
- o The number of email invitations sent out.
- o The number of interviews started.
- o The number of interviews completed.
- o The response rate.
- o The completion rate.
- o 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.

		Collection channel	
	Total	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 21 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.

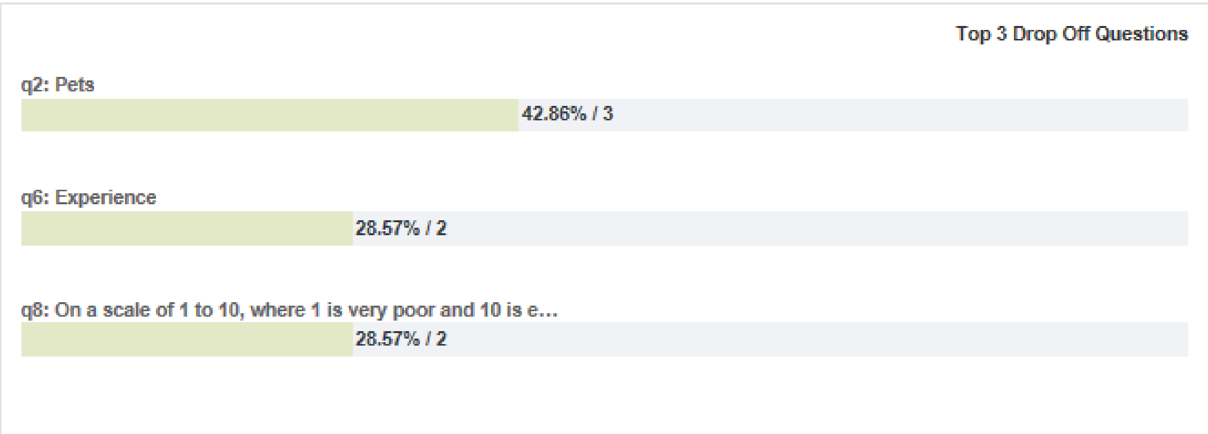


Figure 22 Example of the Drop Off Questions chart

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

3.3. The 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 if you open the Settings tab from the Survey Designer (see The Designer Tab on page 28 for more information), the same settings will be available to you but the layout will be slightly different.

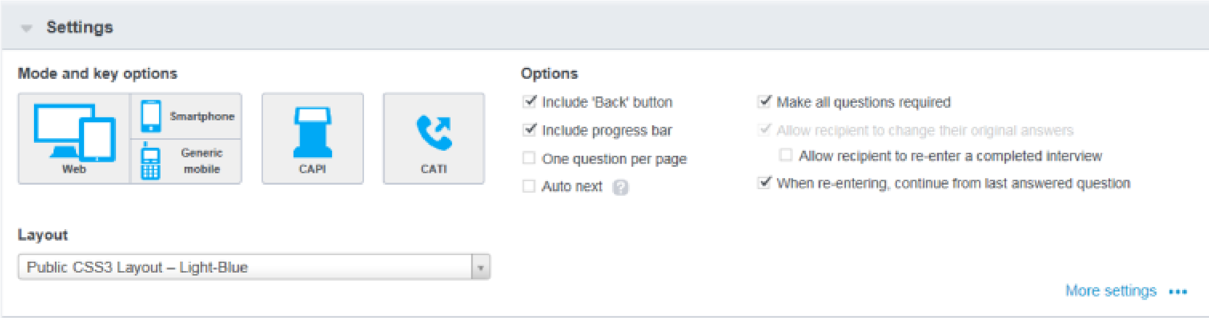


Figure 23 The Settings area

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 19 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 22 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 23 for more information). Refer also to the separate CATI User Guide for further details.

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 55 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 settings - click this link to open a page with more options and settings (see More Settings on page 17 for more information). Note that some of the settings on this page will be available depending on options selected previously.

3.4. More Settings

Click the link in the lower-right corner of the General settings area to access additional settings.

3.4.1. Options

This section contains.

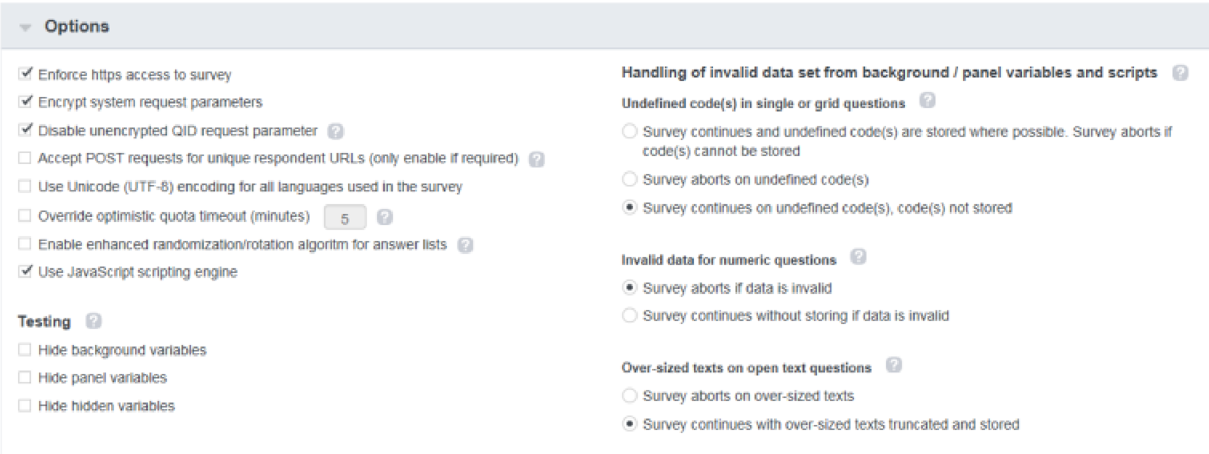


Figure 24 The Options settings

- **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 (go to File Library 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_FkhnkHIS-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.
- **Testing -** the settings apply to test mode, quick test and external quick test. When using the random data generator (RDG), the settings for background variables and panel variables will be applied and these variables will not be populated by the RDG if set to hidden.
  - **Hide background variables -** check to hide background variables when using the test functionality.
  - **Hide panel variables -** check to hide these variables when using the test functionality.
  - **Hide hidden variables -** check to hide these variables when using the test functionality.
- **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.

3.4.2. Web

In the Web options area you define the overall 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.

3.4.3. Mobile

Under Mode and key options (see The Settings Area on page 15 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.

3.4.3.1. 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 22 for more information).

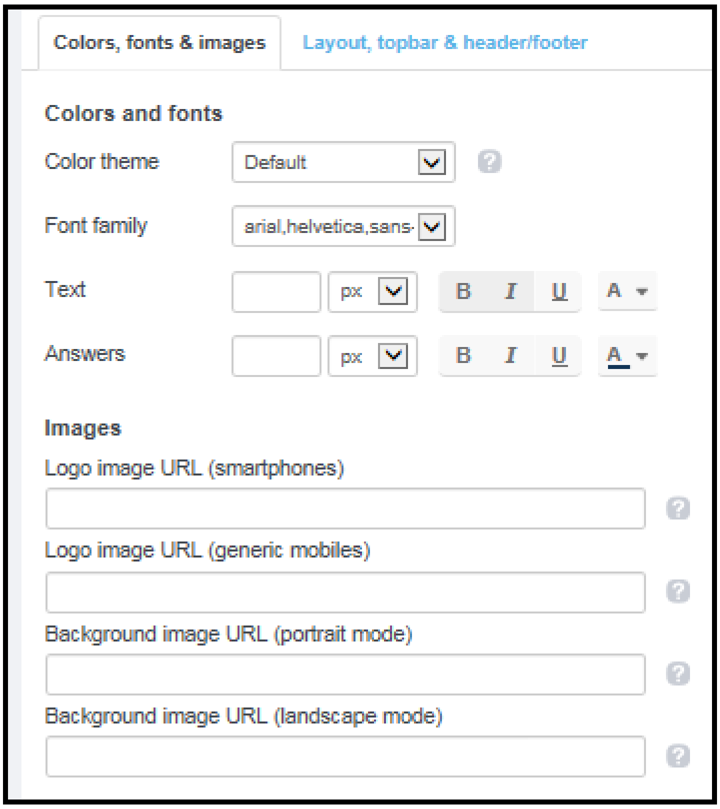


Figure 25 The Colors, fonts and images tab

- **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 20 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.

3.4.3.2. 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 22 for more information).

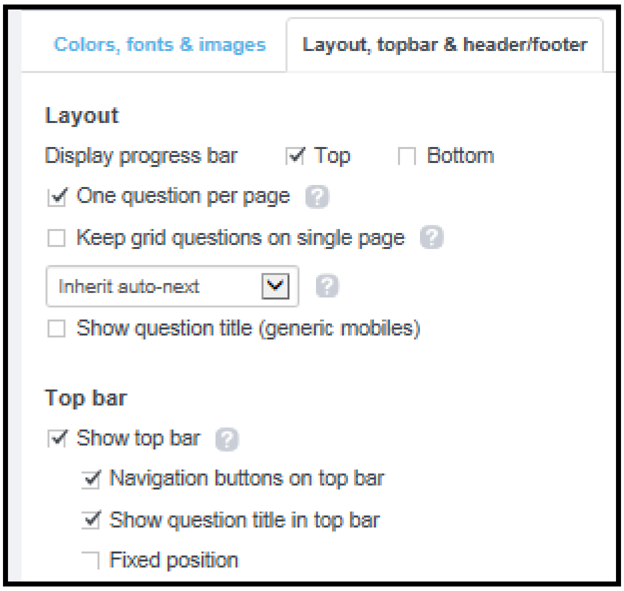


Figure 26 The Layout, topbar and header/footer tab

- **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.

3.4.3.3. 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 15 for more information) then you can select between the two layouts, and you can select between several question types to see how the different questions will look.

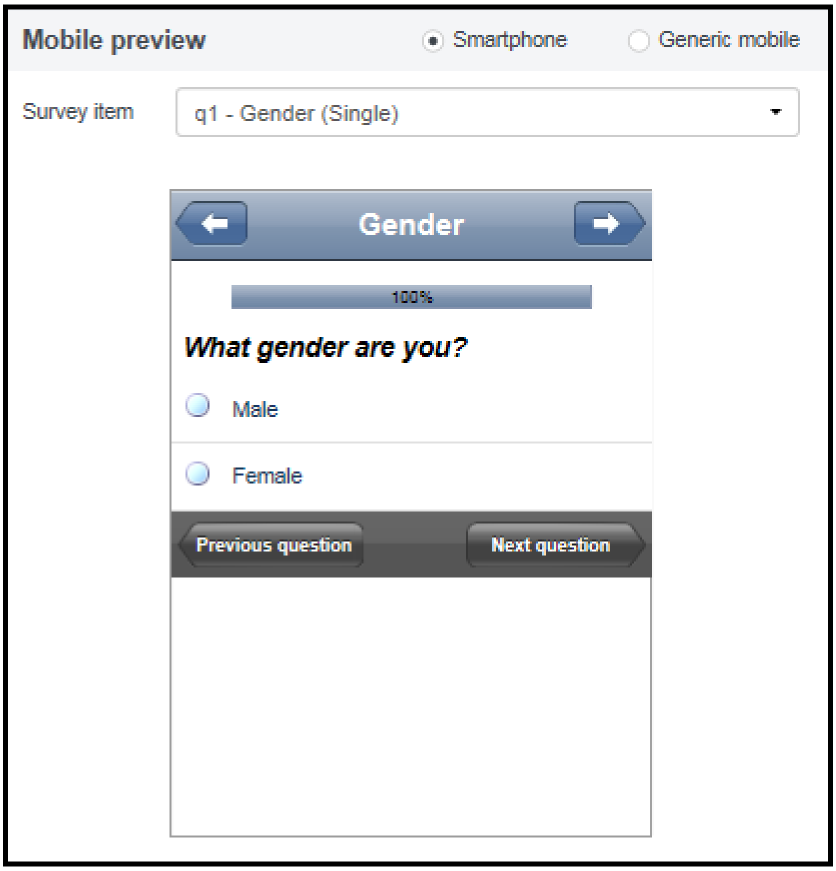


Figure 27 Example of the Mobile preview area

3.4.4. CAPI - In-Person/Kiosk

Under Mode and key options (see The Settings Area on page 15 for more information), when the CAPI option is selected, the CAPI - In-person/Kiosk settings are available under the More settings link.

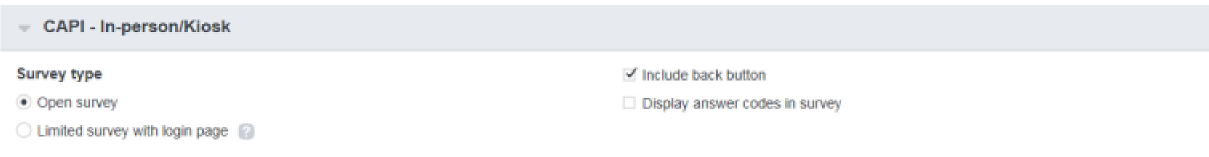


Figure 28 The CAPI - In-person/Kiosk settings

- **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.
- **Restricted survey -** 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.
- **Include Back button -** adds a **Back** button to each page of the survey so respondents can go back to previous pages and change their answers.

- **Display answer codes in survey -** check to include the codes beside the answer labels on the question pages in the survey.

3.4.5. CATI - Telephone

Under Mode and key options (see The Settings Area on page 15 for more information), when the CATI option is selected, the CATI - Telephone settings are available under the More settings link.

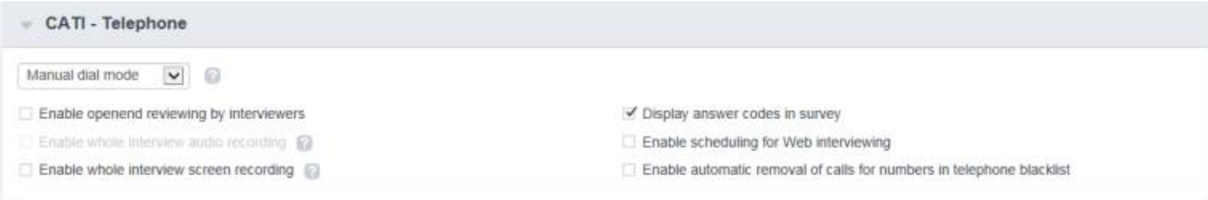


Figure 29 The CATI - Telephone settings

- 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:
  - o **Manual -** the interviewer is allocated a telephone number by the CATI system, and manually dials the number on his/her telephone.
  - o **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.
  - o **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.
  - o **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.

3.4.6. 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.

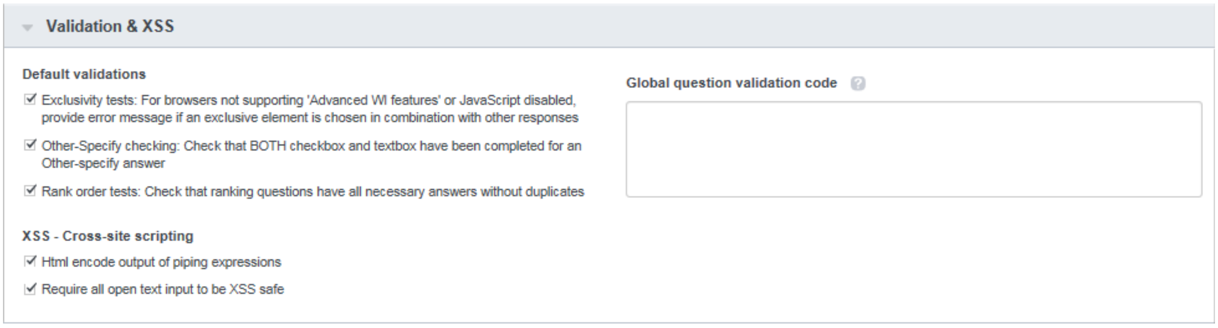


Figure 30 The Validation and XSS settings

- **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 >.

3.4.7. Layout

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

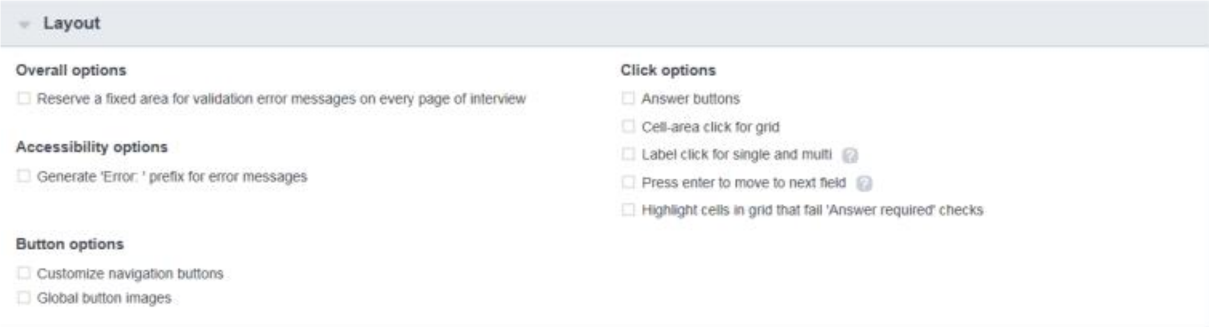


Figure 31 The Layout settings

- **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.

3.5. 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.

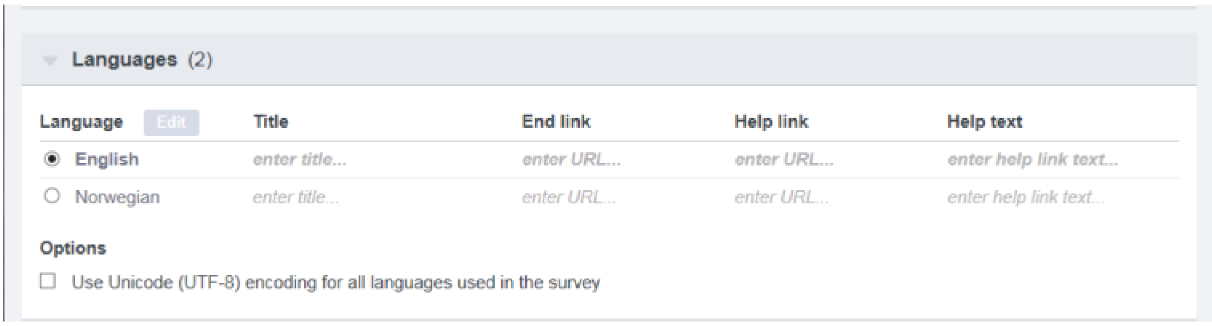


Figure 32 The Language area

To change the languages selected for the survey:

1. Click **Edit**.

   The Language selector overlay opens.

Figure 33 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.

You can then 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 links -** 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 links -** 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. 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 overview opens.

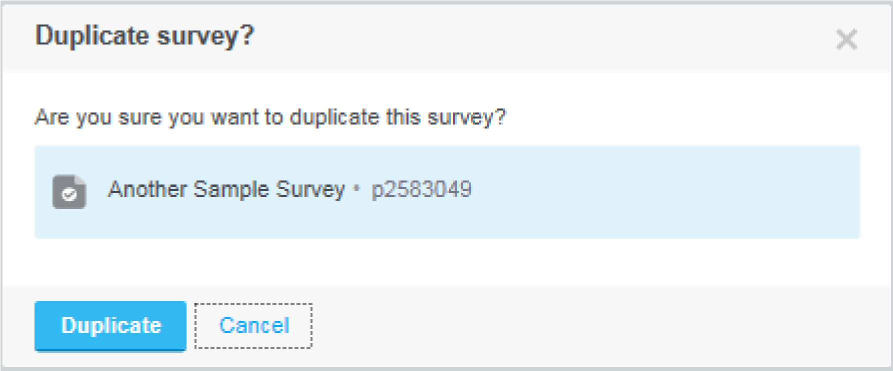


Figure 34 The Duplicate Survey overlay

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.

3.7. 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.

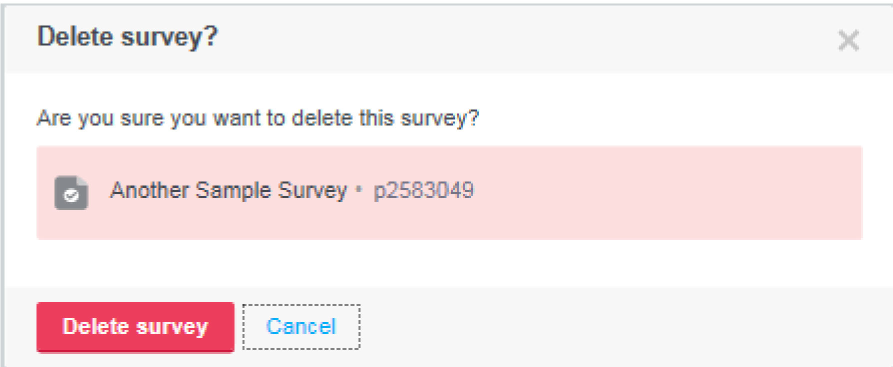


Figure 35 The Delete Survey overlay

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.

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 11 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 Designer Tab on page 28 for more information).
- **Deployment -** is where you launch the survey. Here you create and update the databases (see Launching the Survey on page 104 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 122 for more information).

4.1. The Designer Tab

The Designer 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.

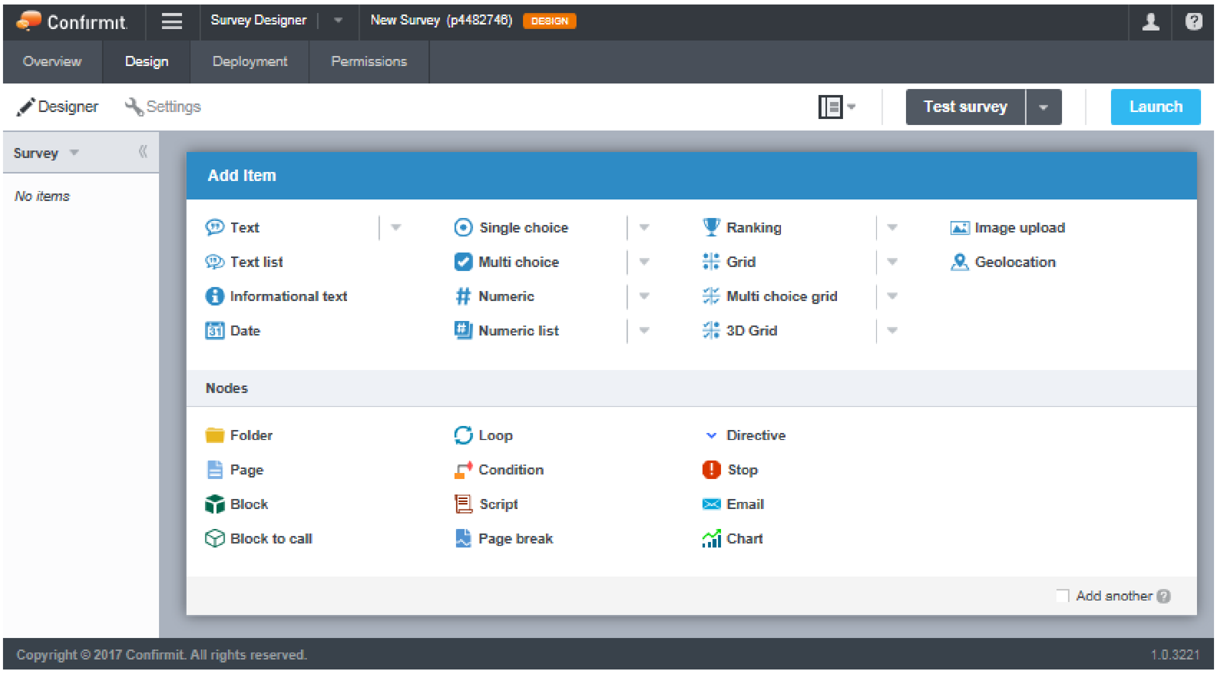


Figure 36 The Design tab for a new, empty survey

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.

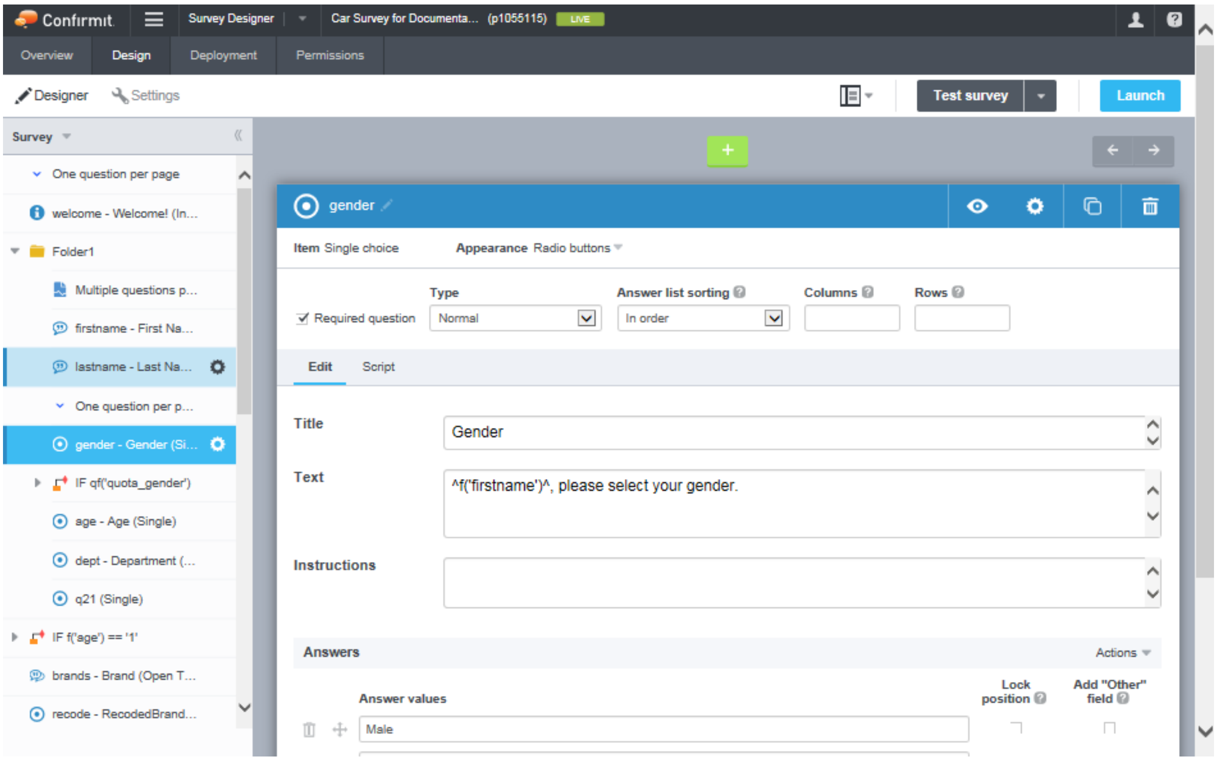


Figure 37 Example of a Question Details overlay

if you wish you can close the survey column (maybe you would prefer to have more space in the design area), and you can then move through the survey questions by clicking the **Next** and **Previous** 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.

4.2. The Survey Column

You build your survey in the Survey column on the left side of the Designer page, putting the questions and other nodes into the column in the order in which the respondents are to experience them. The selected question is highlighted and its Question Details overlay is presented in the editing pane on the right.

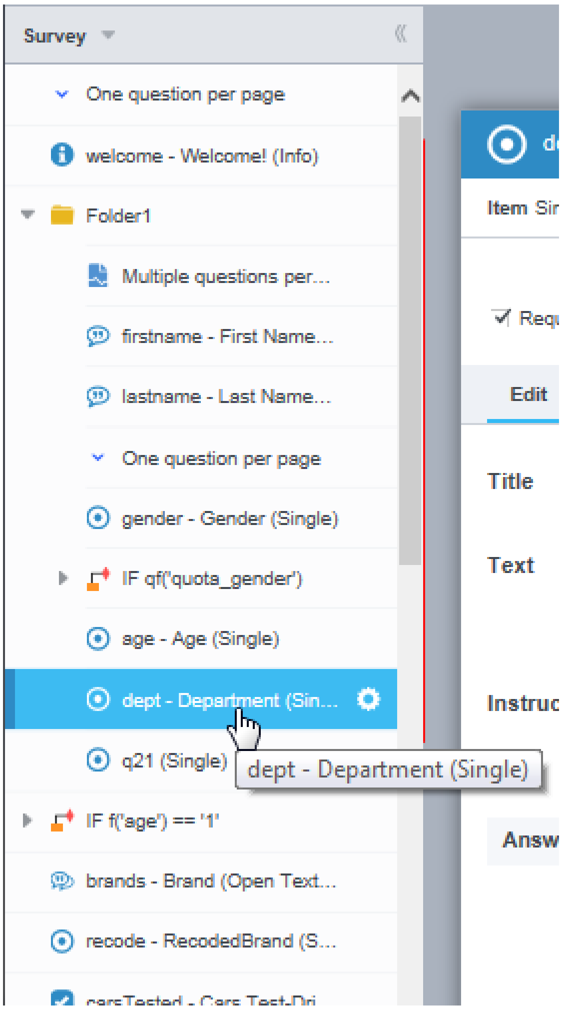


Figure 38 Example of a survey in the Survey column

The Survey column has a drop-down menu of options to allow you to adjust the presentation of the column (see The Survey Column Drop-down Menu on page 30 for more information). You can re-size the column by hovering the mouse pointer over the right edge of the column's scrollbar (around the red line in figure above) such that the pointer changes to a double-head arrow, and dragging the edge of the column.

If a question ID and title text is too long to fit into the column width, then the text will be clipped. To see the full text, hover the mouse pointer over the question in the survey column as in the figure above.

4.2.1. The Survey Column Drop-down Menu

The Survey column has a drop-down menu containing options to allow you to adjust the presentation of the column and create reusable lists. To open the menu, click the down-arrow beside the Survey header.

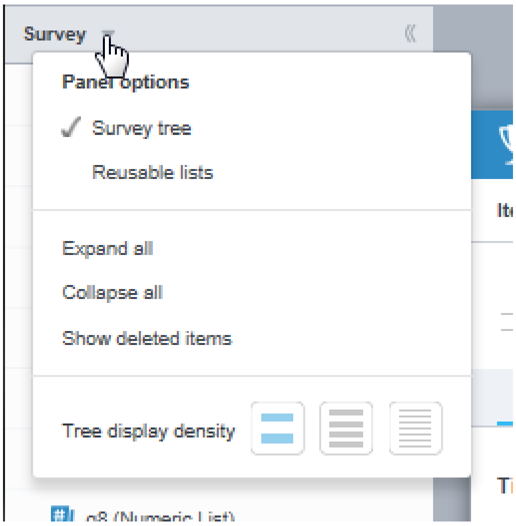


Figure 39 The Survey column drop-down menu

- **Survey tree -** (default). If you have been working with reusable lists, select this option to return to the survey tree panel.
- **Reusable lists -** opens the Reusable lists panel where you can create and edit your lists (see Reusable Lists on page 88 for more information).
- **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.

4.3. How to Create a New Survey

1. When in the Surveys list, click the **New Survey** button or go to the **Surveys** menu and click **Create New Survey**.

   The New Survey page opens.

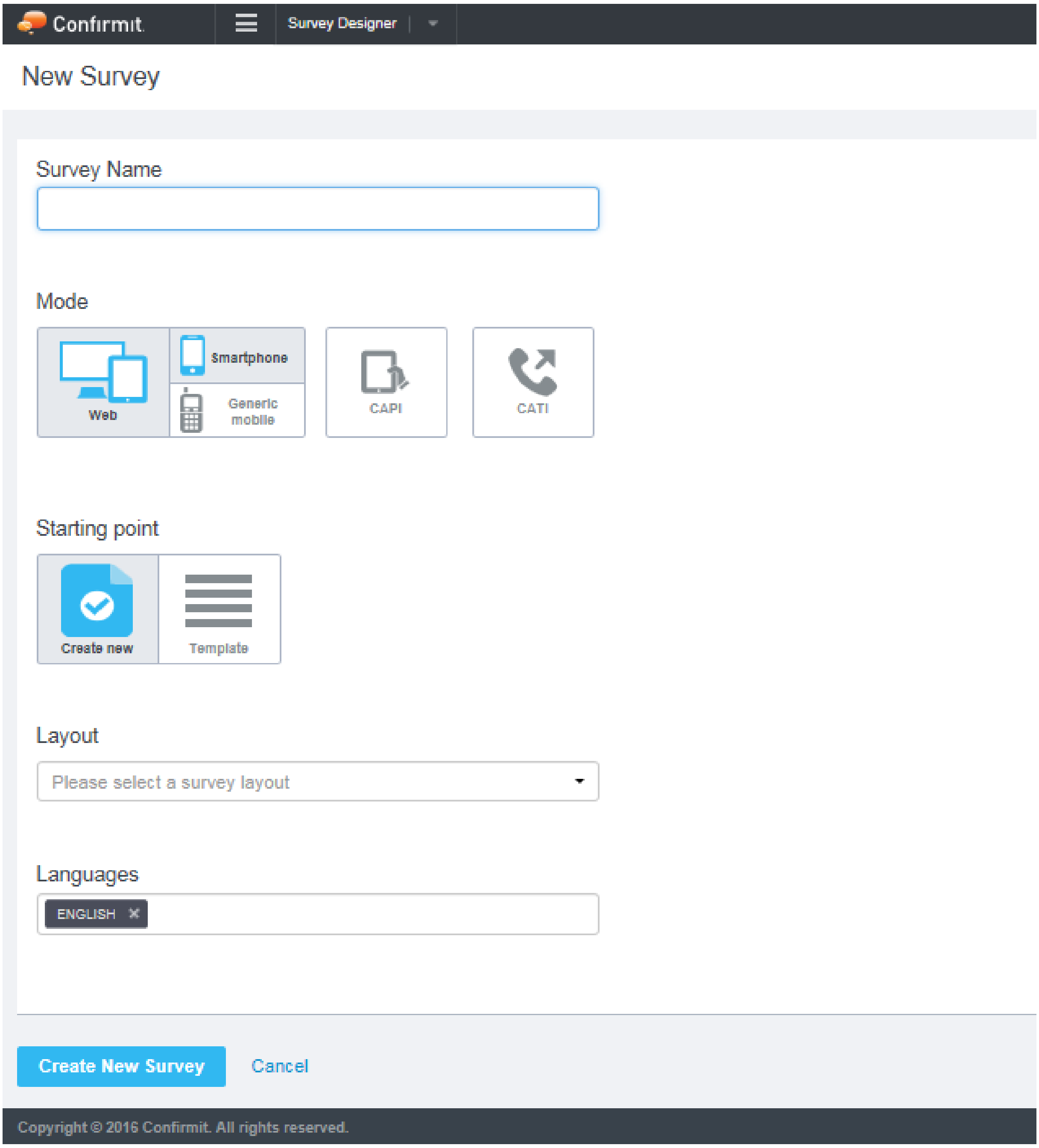


Figure 40 The New Survey page

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 15 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 33 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 25 for more information).

7. Click **Create New Survey**.

The survey now exists, and the Survey Designer page opens (see The Designer Tab on page 28 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. Two basic types of survey layouts are available:

- "Standard" survey layouts.
- Easy Layouts. These are simpler, and can be edited in Confirmit Express. They contain some specific HTML styles and settings.

To select a survey layout for your survey:

1. When in the survey's Overview page, expand the Settings tab.
2. Click in the **Layout** field.

   A list of the layouts available to you opens.

   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 have that text string. Any characters can be used, including space, and if the text string you have typed cannot be found then a message will be displayed.
3. Browse to the layout you wish to use and select it.

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

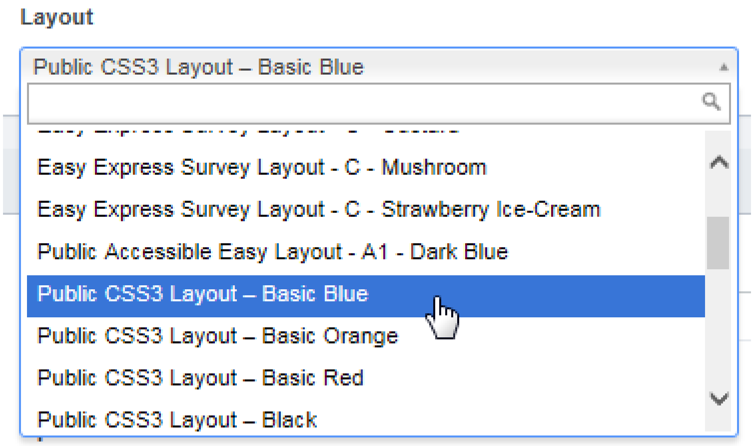


Figure 41 Selecting the survey layout

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!

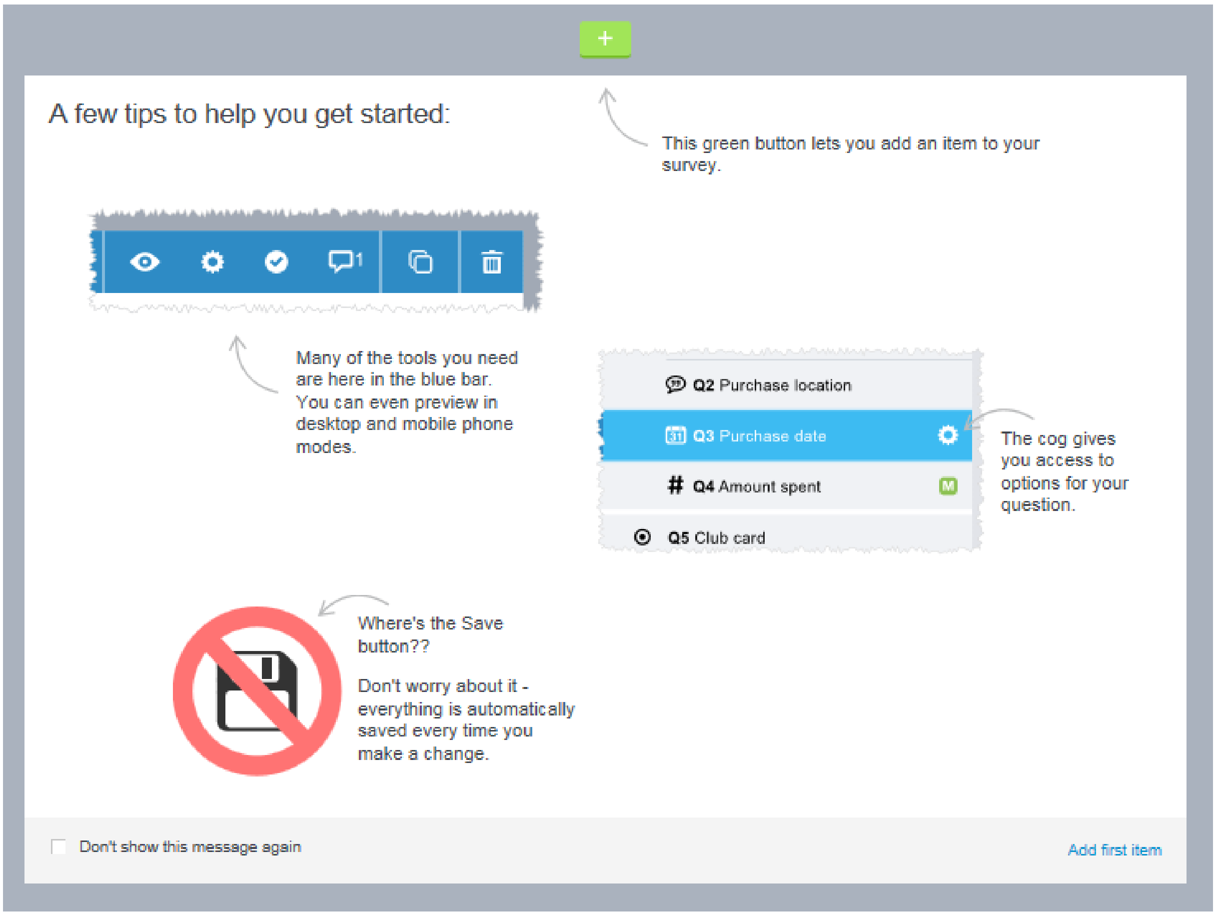


Figure 42 The Tips overlay

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 Object Types on page 34 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. Object Types

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

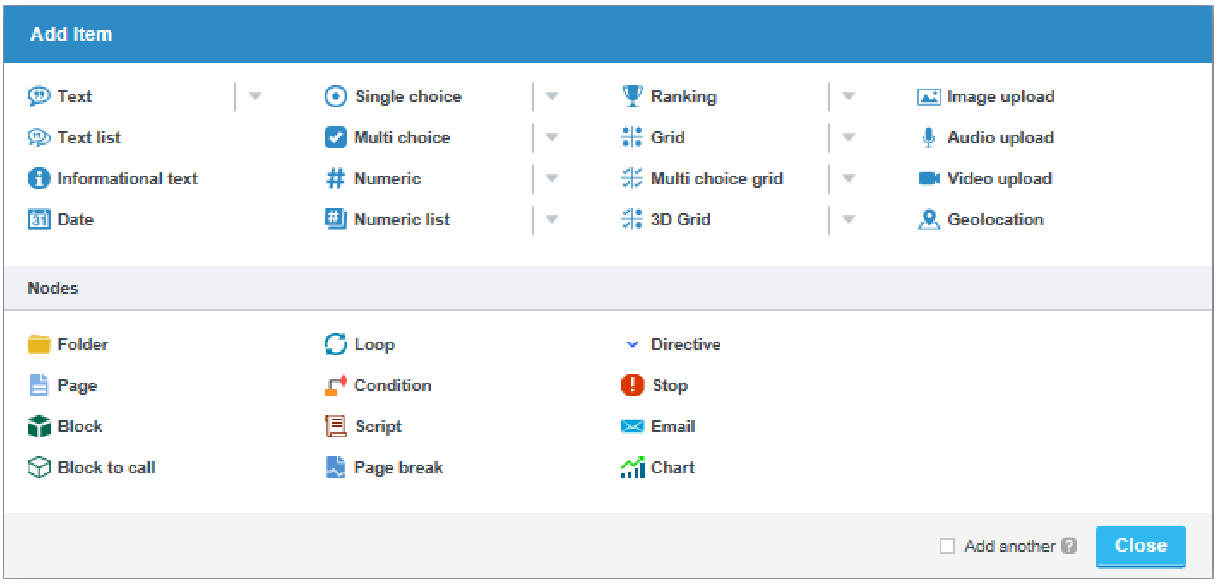


Figure 43 The Add Item overlay

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.

4.4.1. The Text Object

The Text object 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 67 for more information).

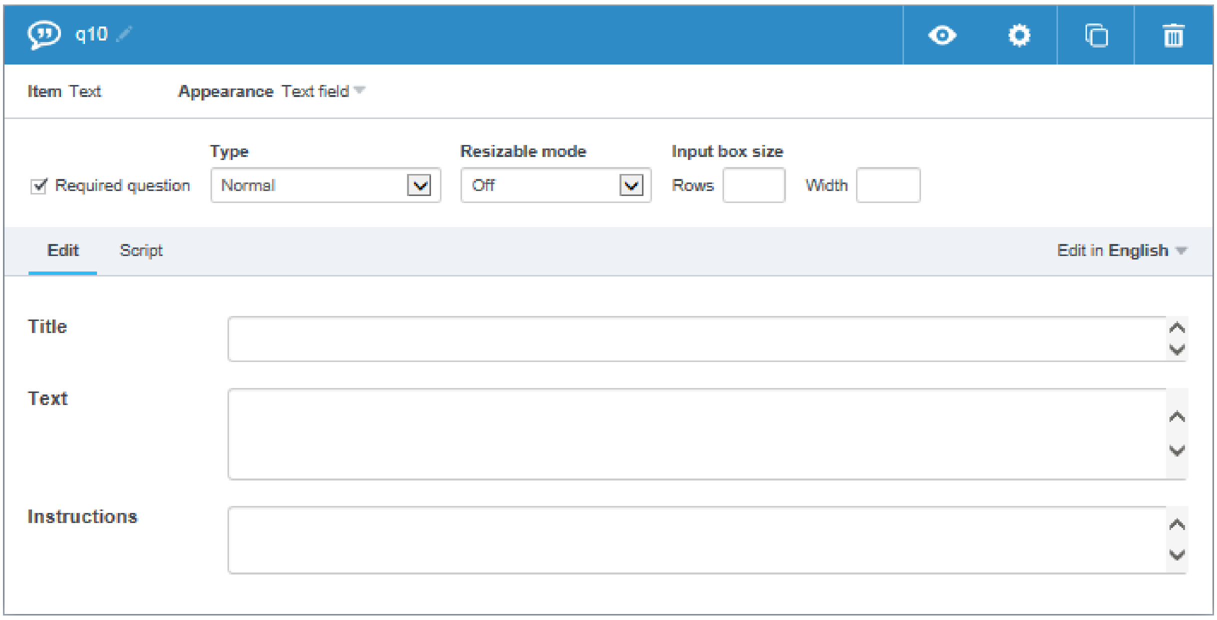


Figure 44 The Text object’s question details page

A variation on this question type is the Text List object. This object 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 Object on page 36 for more information).

4.4.2. The Text List Object

A variation on the Text question type is the Text List. This object 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 object 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 67 for more information).

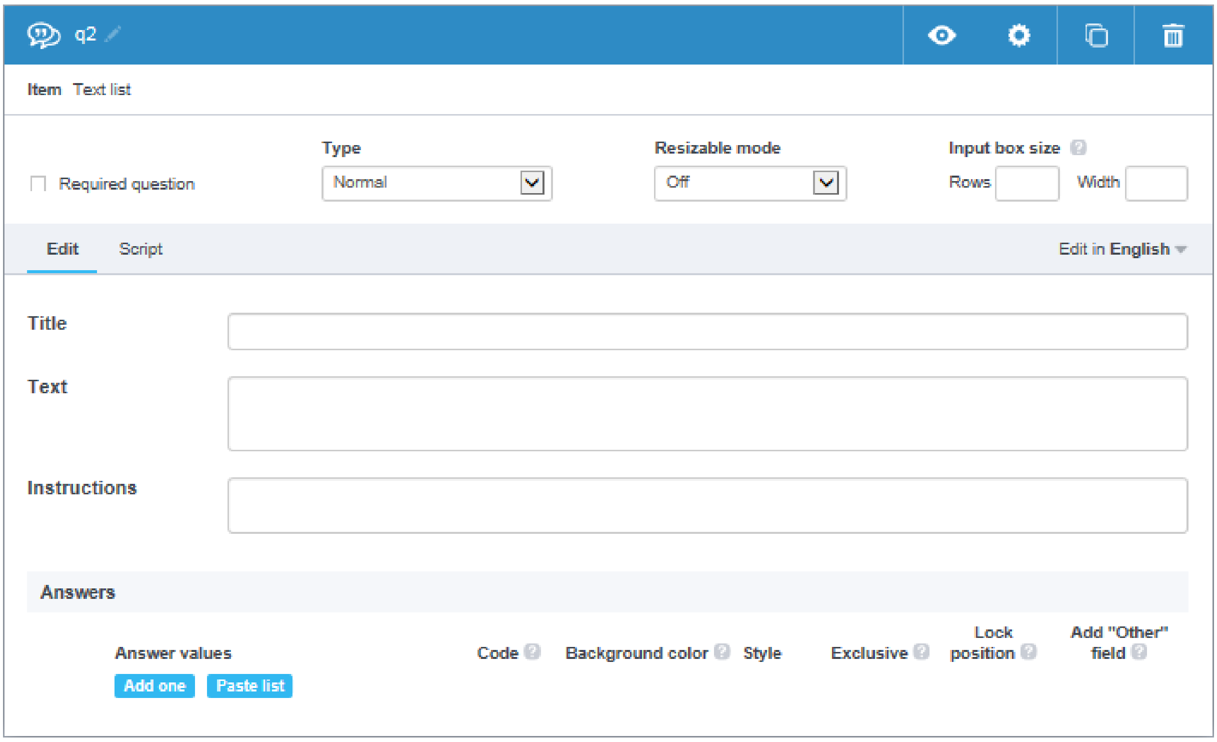


Figure 45 The Text List object's question details page

A Text List question requires an answer list (see Answers, Prompts and Scales on page 81 for more information).

4.4.3. The Information Text Object

The Information Text object 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 67 for more information).

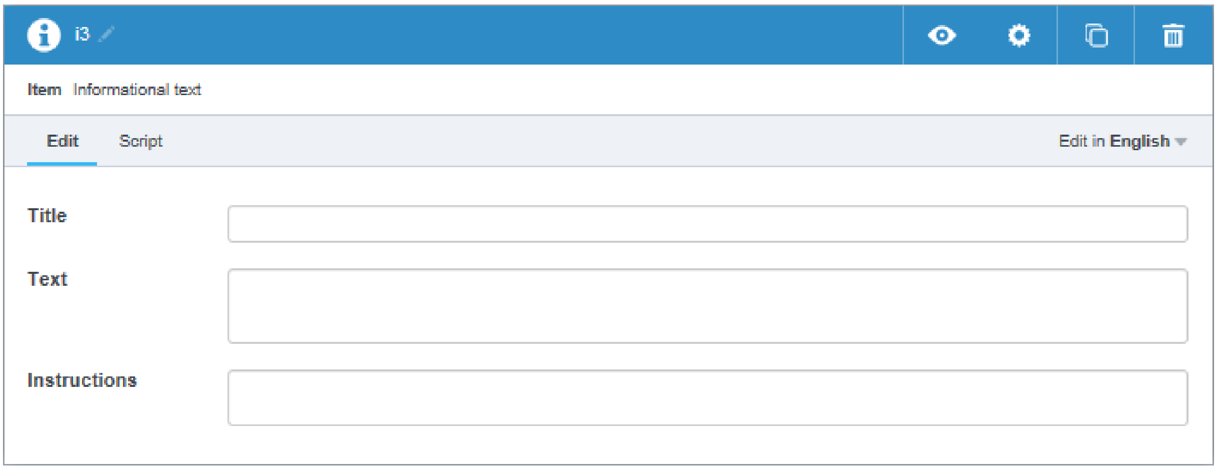


Figure 46 The object in the Questionnaire Tree

- 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 Object

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 67 for more information).

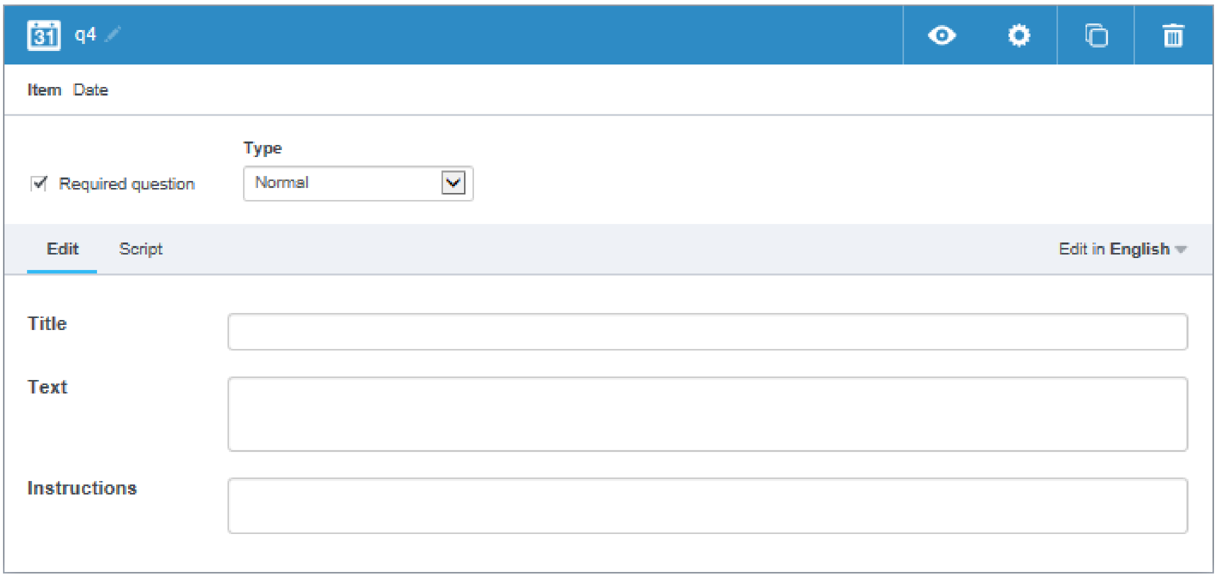


Figure 47 A Date object in the Questionnaire Tree

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 object is used in a survey, it will be available (as all other objects) 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 Object

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 67 for more information).

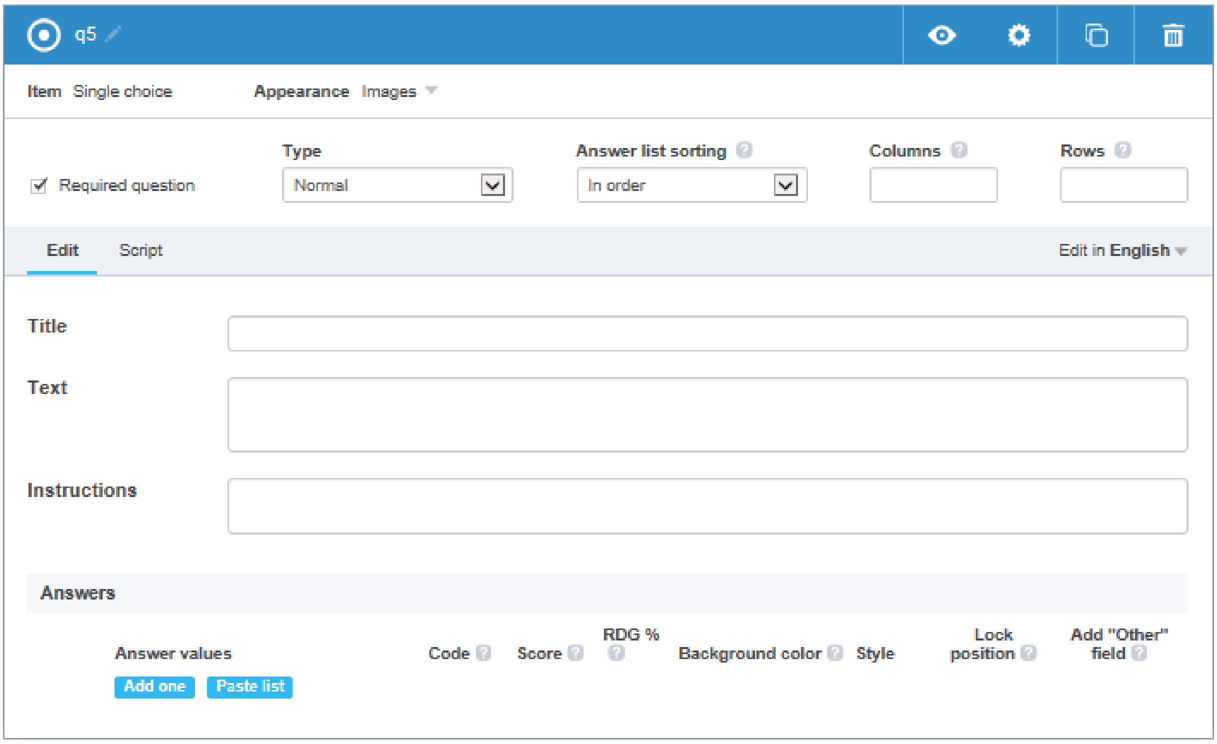


Figure 48 The Single object's question details page

You can convert a Single question to a Multi if you need to. To do so, right-click on the object in the Questionnaire Tree and select **Convert to Multi** (see The Multi Choice Object on page 38 for more information).

4.4.6. The Multi Choice Object

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 67 for more information).

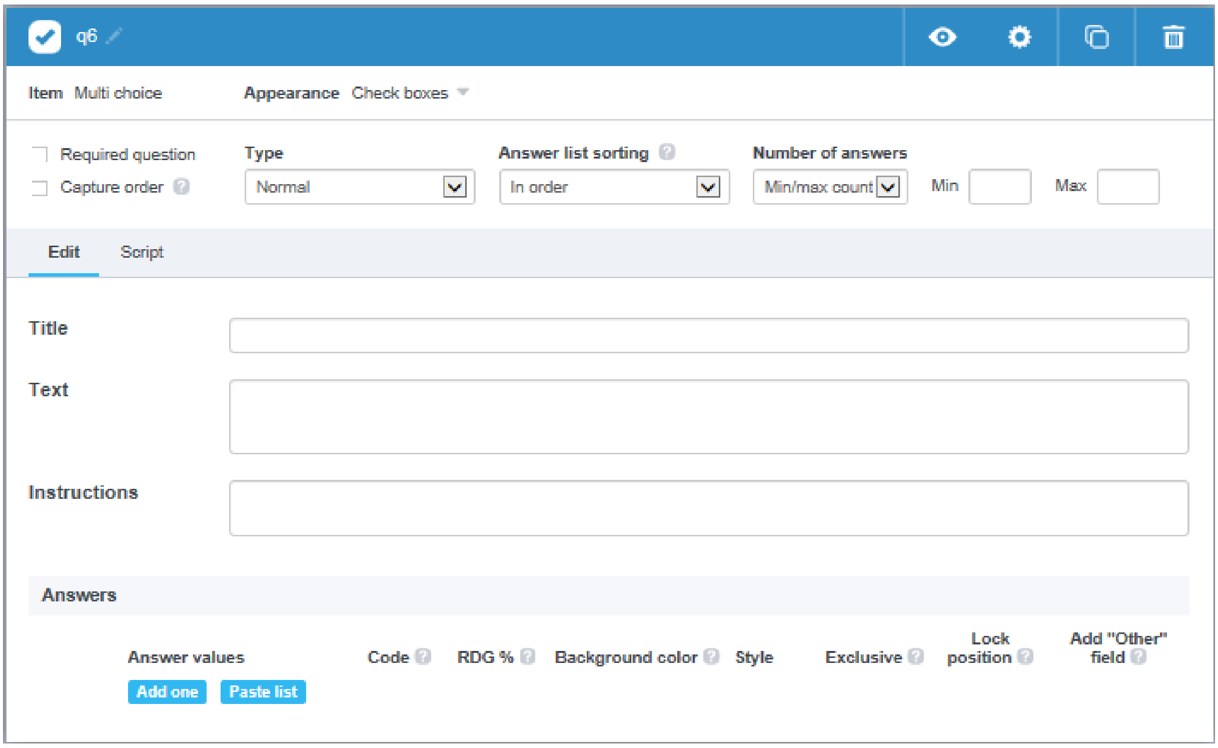


Figure 49 The question details overlay for a multi choice object

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 object 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 67 for more information).

4.4.7. The Numeric Object

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 67 for more information).

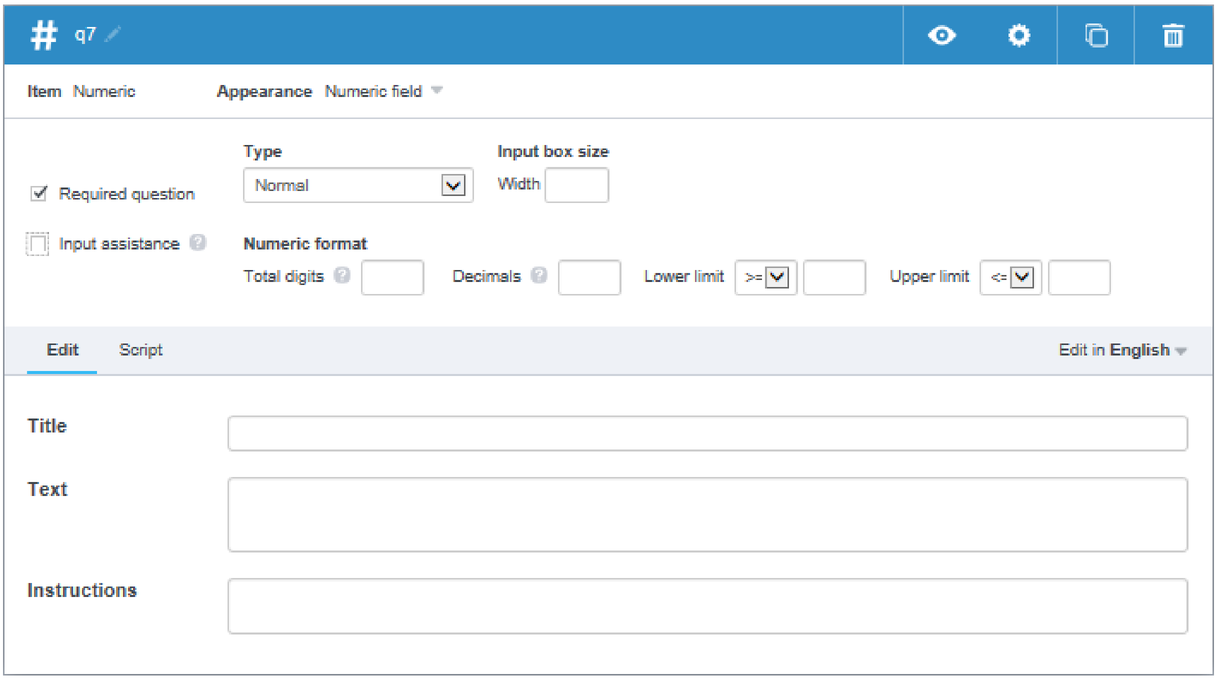


Figure 50 The Numeric object's question details page

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

A variation on this question type is the **Numeric List** object (see The Numeric List Object on page 40 for more information). This object 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 67 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.

4.4.8. The Numeric List Object

A variation on the Numeric question type is the Numeric List. This object 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 67 for more information).

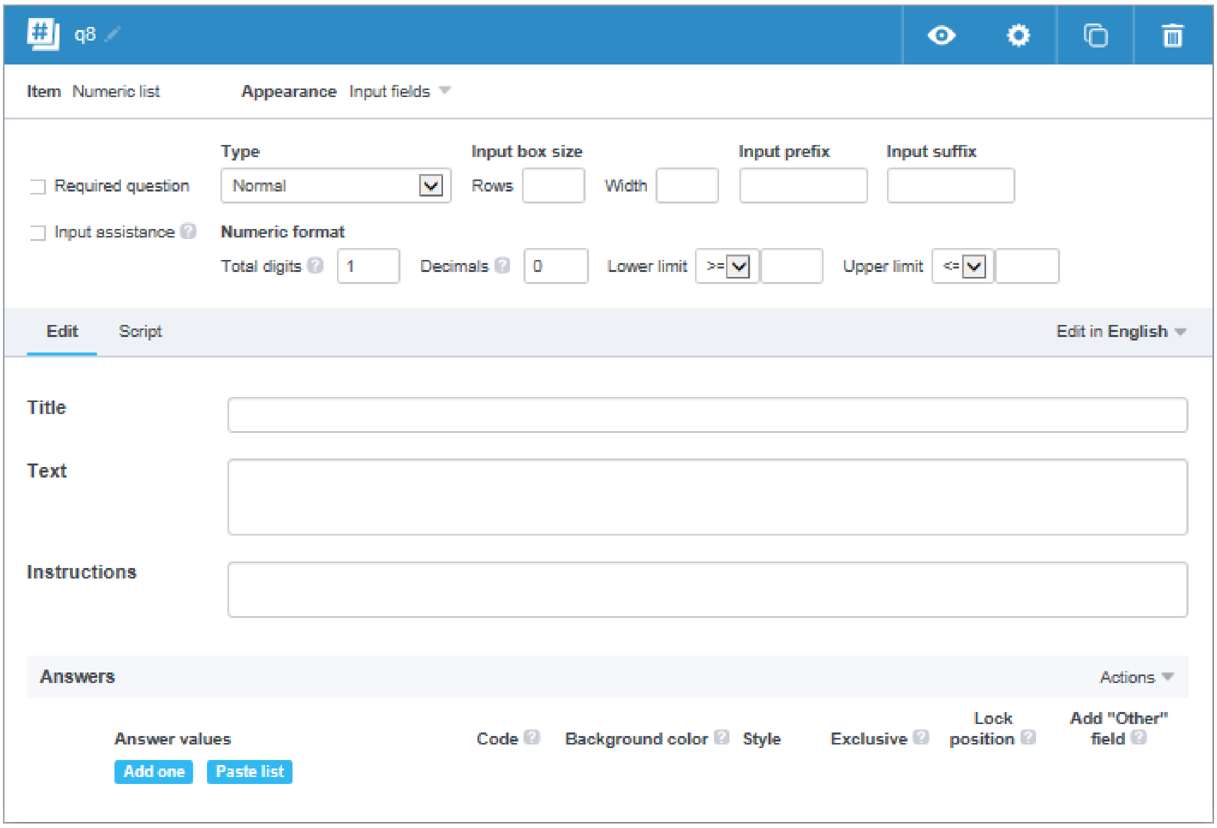


Figure 51 The Numeric List object's question details page

You can convert a Numeric List question to a Single, Multi, Ranking or Open Text List. To do this, right-click on the object 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 67 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 Ranking Object

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 object 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 67 for more information).

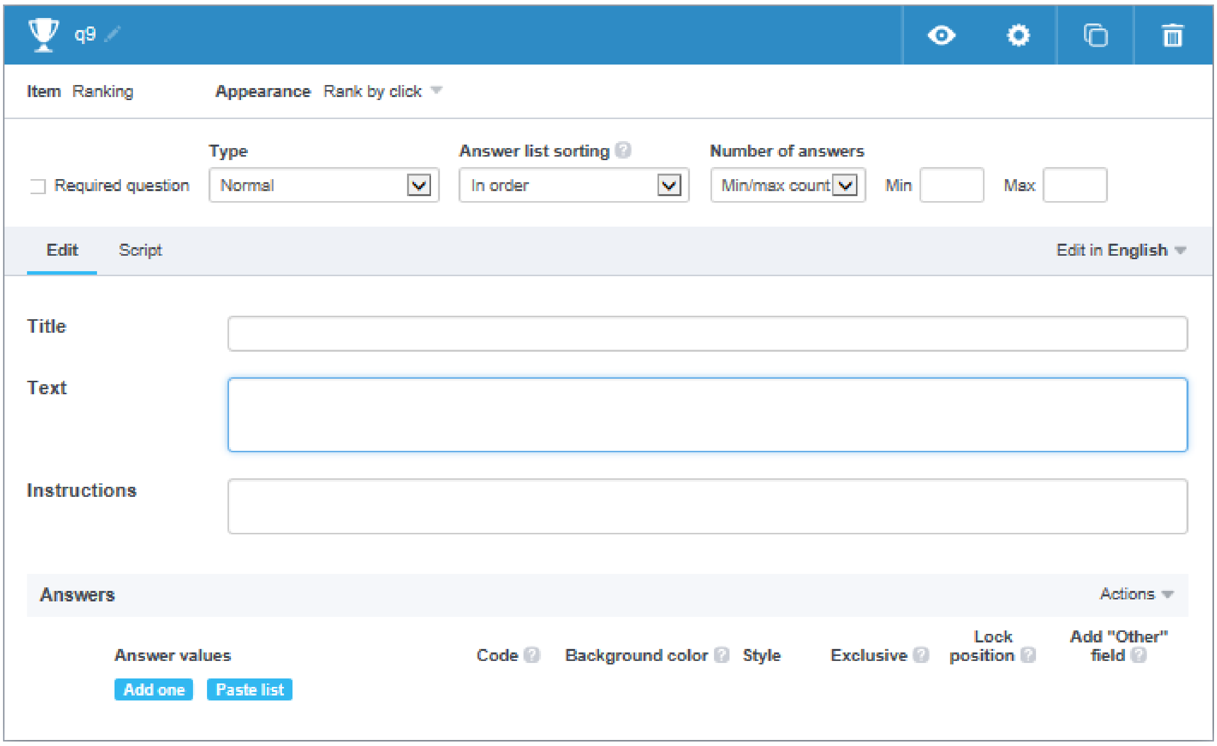


Figure 52 The Ranking object's question details page

A Ranking question requires an answer list (see Answers, Prompts and Scales on page 81 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 cog-wheel icon for the object in the Survey column and select **Convert to**.

4.4.10. The Grid Object

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 object 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 67 for more information).

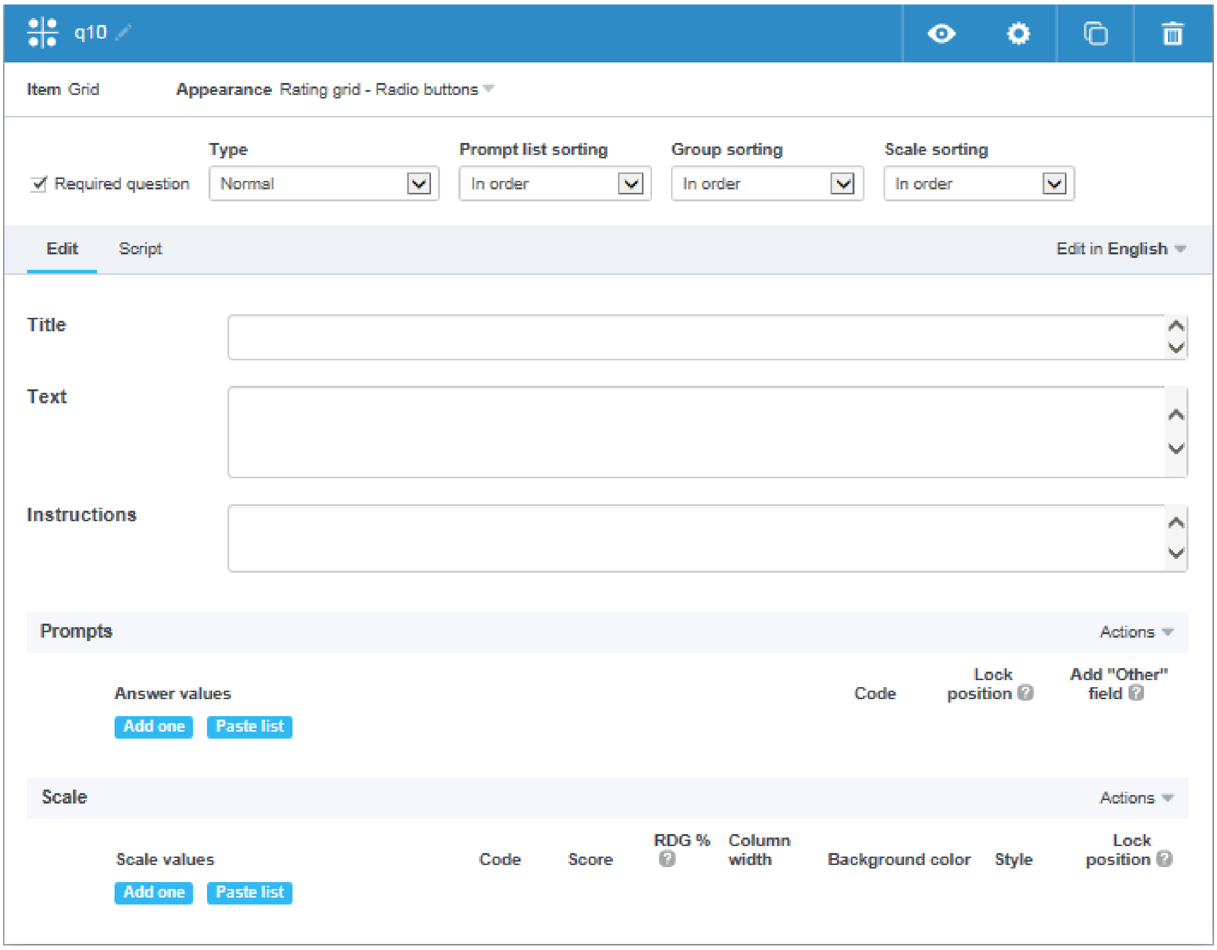


Figure 53 The Grid object's question details page

- **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 object is the 3D-Grid (see The 3D Grid Object on page 45 for more information).

4.4.11. The Multi Choice Grid Object

The standard 3D-grid object 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 object is a 3D-grid object 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 object is supported in all rendering modes; desktop, mobile, CATI and CAPI.

The question details page for this object 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 67 for more information).

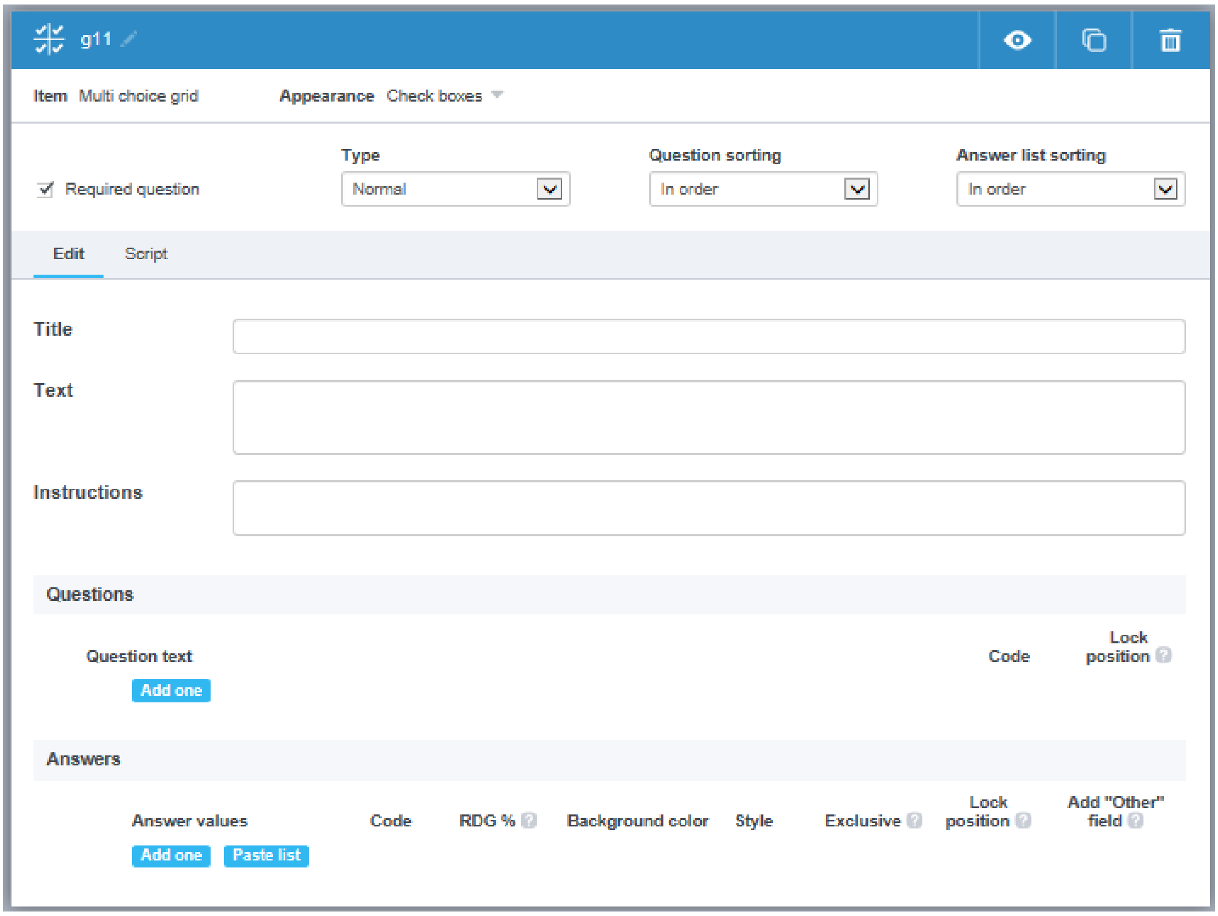


Figure 54 The Multi choice grid object's question details page

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 object 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

4.4.12. The 3D Grid Object

A 3D grid object allows you to combine various question types into one object 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 object 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 67 for more information).

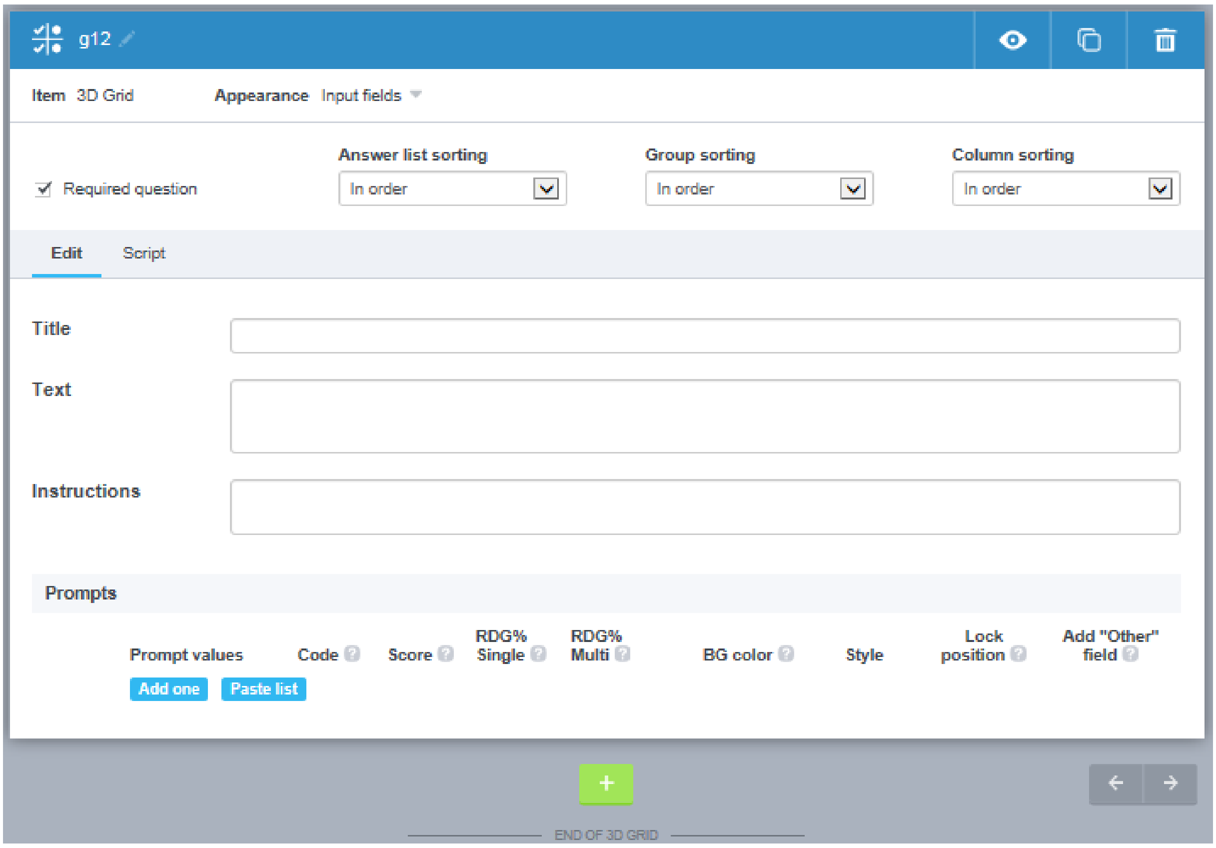


Figure 55 The 3D Grid object's question details page

To add a question into the 3D Grid object, click the green + button above the “End of 3D Grid” line. The 3D grid object can contain the following question types:

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

Note: The standard 3D-grid object 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 Object on page 43 for more information).**

4.4.13. The Image Upload Object

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

The question details page for this object 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 67 for more information).

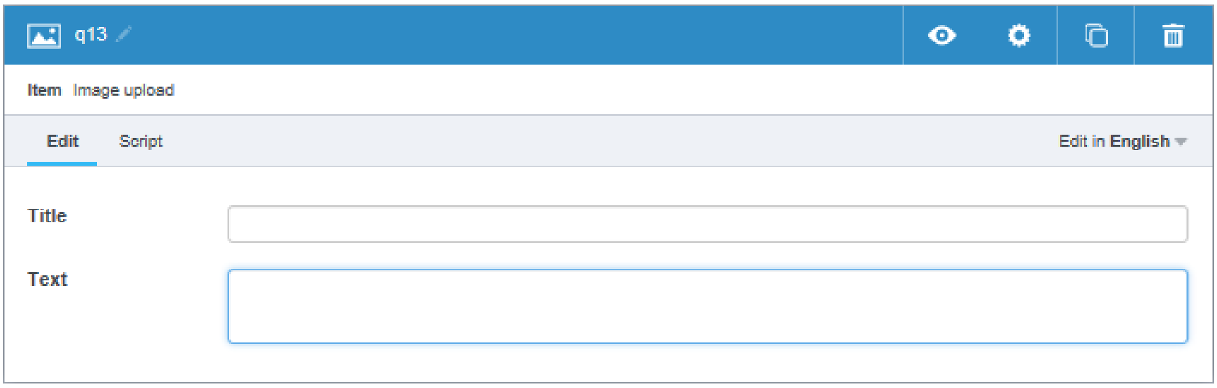


Figure 56 The Image Upload object's question details page

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 object; 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 (as described in the System Requirements section) but your browser is emulating an earlier version, the Image Upload functionality will not work. In this case you must enable the "Use newest available version of IE rendering" property in the theme that you are using.

4.4.14. The Audio Upload Object

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

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

The question details page for this object 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 67 for more information).

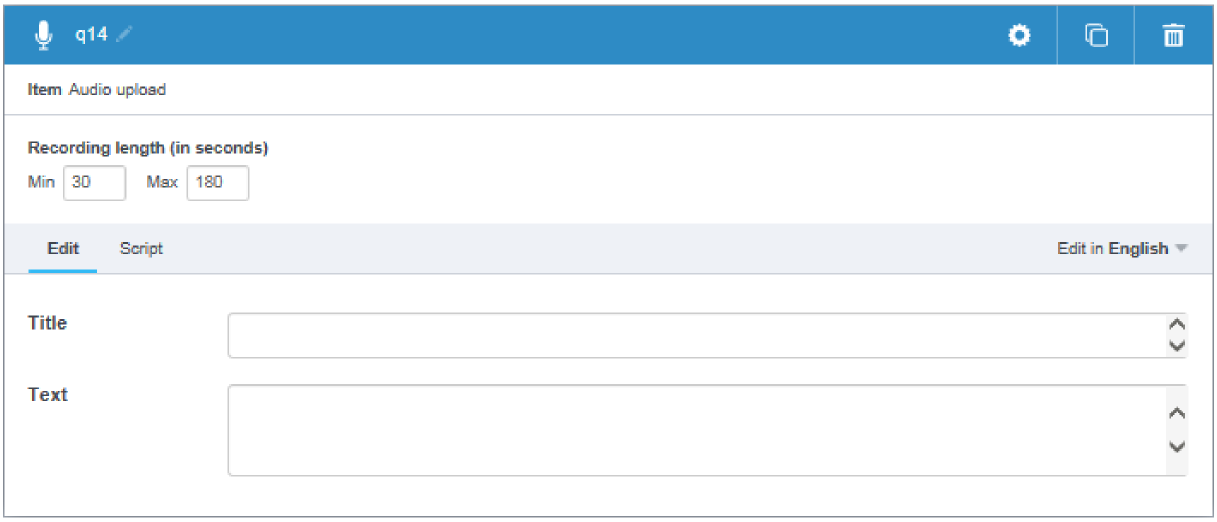


Figure 57 The Audio Upload object's question details page

You would use the Text field to tell the respondent what to do in this question.

4.4.15. The Video Upload Object

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

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

The question details page for this object 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 67 for more information).

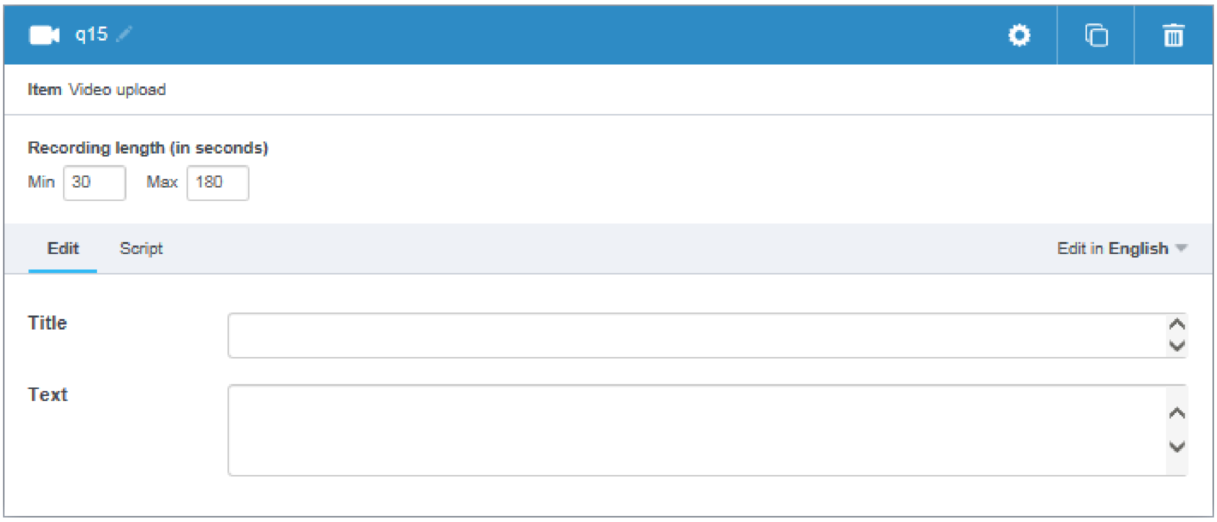


Figure 58 The Video Upload object's question details page

You would use the Text field to tell the respondent what to do in this question.

4.4.16. The Geolocation Object

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

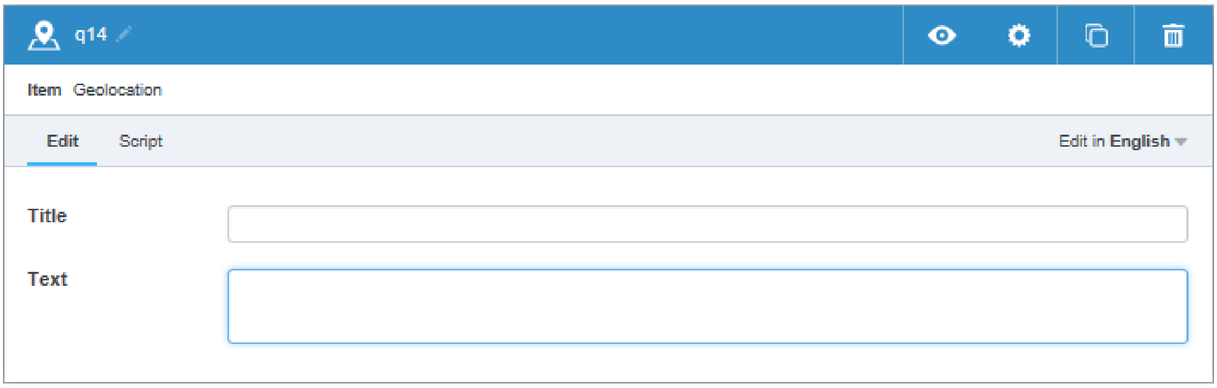


Figure 59 The Geolocation object's question details page

The location data is retrieved from the respondent's browser client geolocator object. When the respondent passes the geolocation object 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 object acts basically in the same way as a "hidden" question, but in this case the object must go to the respondent's browser to gather the information (normal hidden questions do not do this). The object 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 object is placed on the same page as the next interactive question.

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

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

Note that the Geolocation object 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 node value for a respondent cannot be edited in Authoring, and the node 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.

4.4.17. 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 objects around within the survey as when you move a folder, all the objects inside the folder will also be moved.

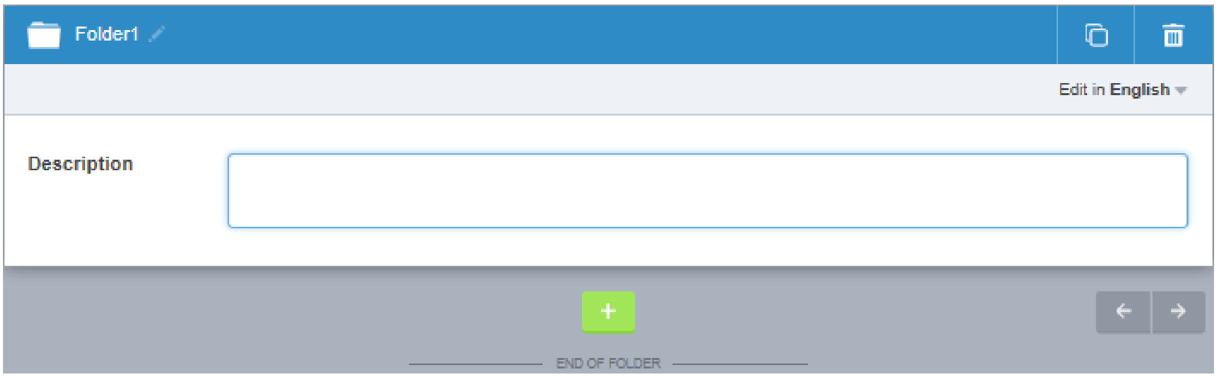


Figure 60 The Folder node's details page

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 object inside a folder, click the green **+** button above the END OF FOLDER line to open the Add Item overlay (see How to Add Objects to the Survey on page 58 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.

4.4.18. 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. Objects 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.

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.

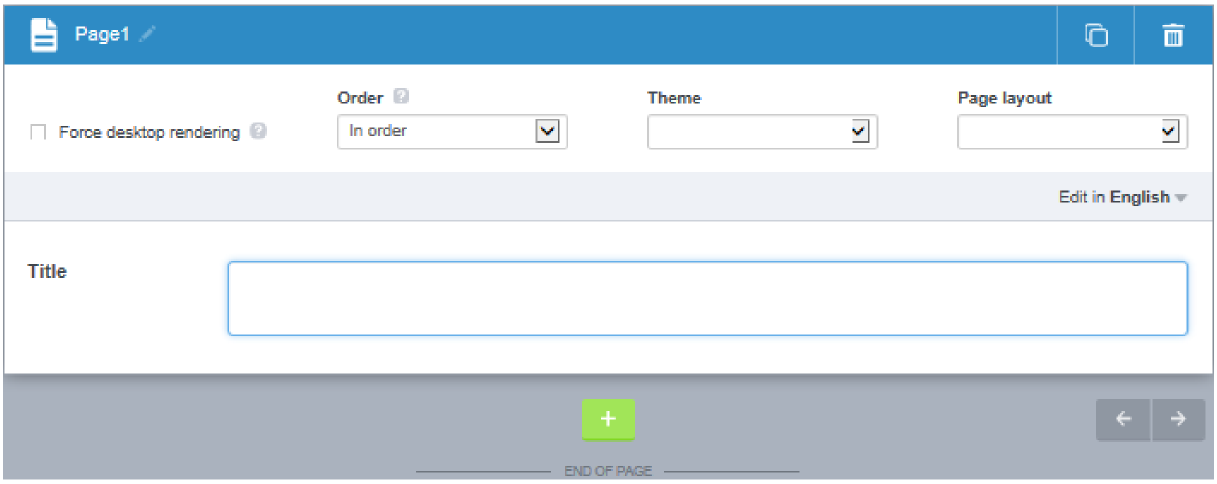


Figure 61 The Page node's details page

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 object inside a page, click the green **+** button above the END OF PAGE line to open the Add Item overlay (see How to Add Objects to the Survey on page 58 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 object. This name appears in the survey column. You can rename the page object 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.

4.4.19. The Block Node

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

- **Blocks** - Horizons has two types of Blocks; those that are located within the survey and are used to group questions for processing, and those that are placed outside the survey that contain sets of questions that are called by Call blocks.
  - The Block element within the survey enables you to group questions together and apply for example randomization and/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 + button below the overlay but above the End Of Block line. 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.
  - The Call Blocks folder in the survey column allows you to set up groups of questions outside of the survey. These 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 object placed in the survey. When the respondent works their way through the survey and they come to a Call Block object, 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.

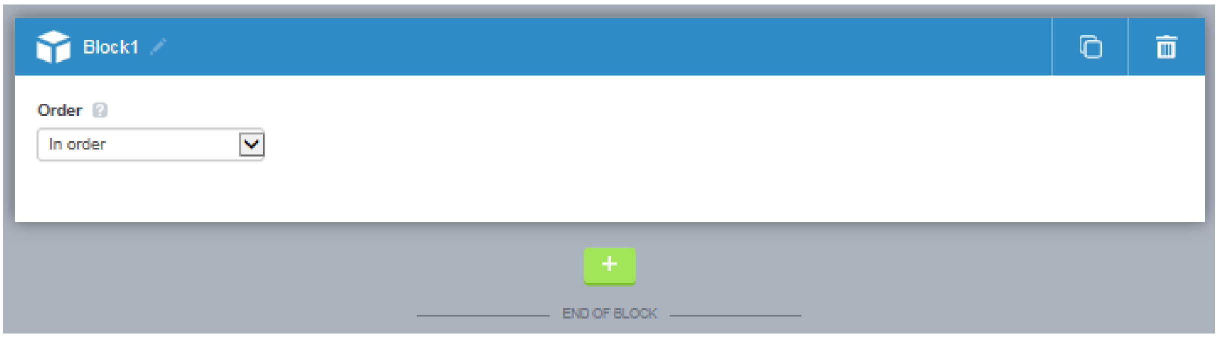


Figure 62 The Block node's details page

Any number of "external" 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. The Call Blocks folder in the routing contains two "special case" blocks by default: Start Block and End Block - see below for descriptions.

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.

- **Start Block** - a Start Block is a special type of Block that will ALWAYS be activated at the beginning of a survey. Any questions or other objects 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. 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.
- **End Block** - an End Block is a special case Block that will ALWAYS be activated at the end of a survey. Any questions or other objects 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. The respondent can then change those answers as required. An End Block object cannot be deleted from the survey. If no questions are added to the End Block then it will be ignored.
- **Block To Call** - Block To Call nodes are used to call or activate a Procedure Block. 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 Procedure Block and the questions within that Procedure Block are presented to the respondent. Once the respondent has answered the questions in the selected Procedure Block, he/she is returned to the survey, to the point at which they left it to process the Procedure Block. The respondent can then continue with the survey. You can add as many Block To Call nodes as you wish to a survey. These nodes can then refer to any Procedure Blocks, and can specify the same Procedure Block more than once.

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.

4.4.20. The Block to Call Node

The Block To Call node is used to call or activate Blocks that have been created in the survey.

This functionality is not yet available for use.

4.4.21. 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.

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

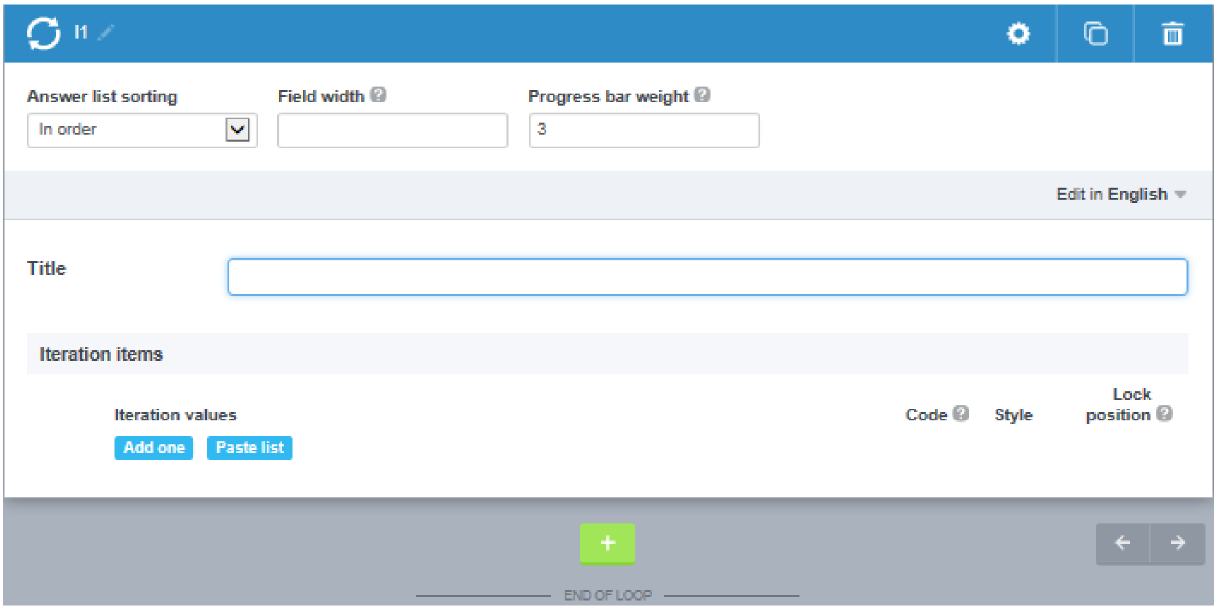


Figure 63 The Loop node's details page

4.4.22. The Condition Node

Use Condition objects 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 object then click on it.

A condition object 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 objects in the THEN node. If the expression evaluates to FALSE, when the ELSE node exists the objects 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 91 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 object in the survey pane in which script is used.

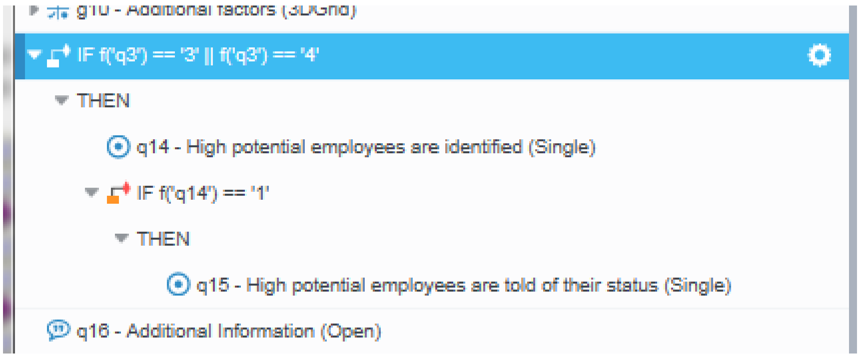


Figure 64 Example of a Condition node

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.

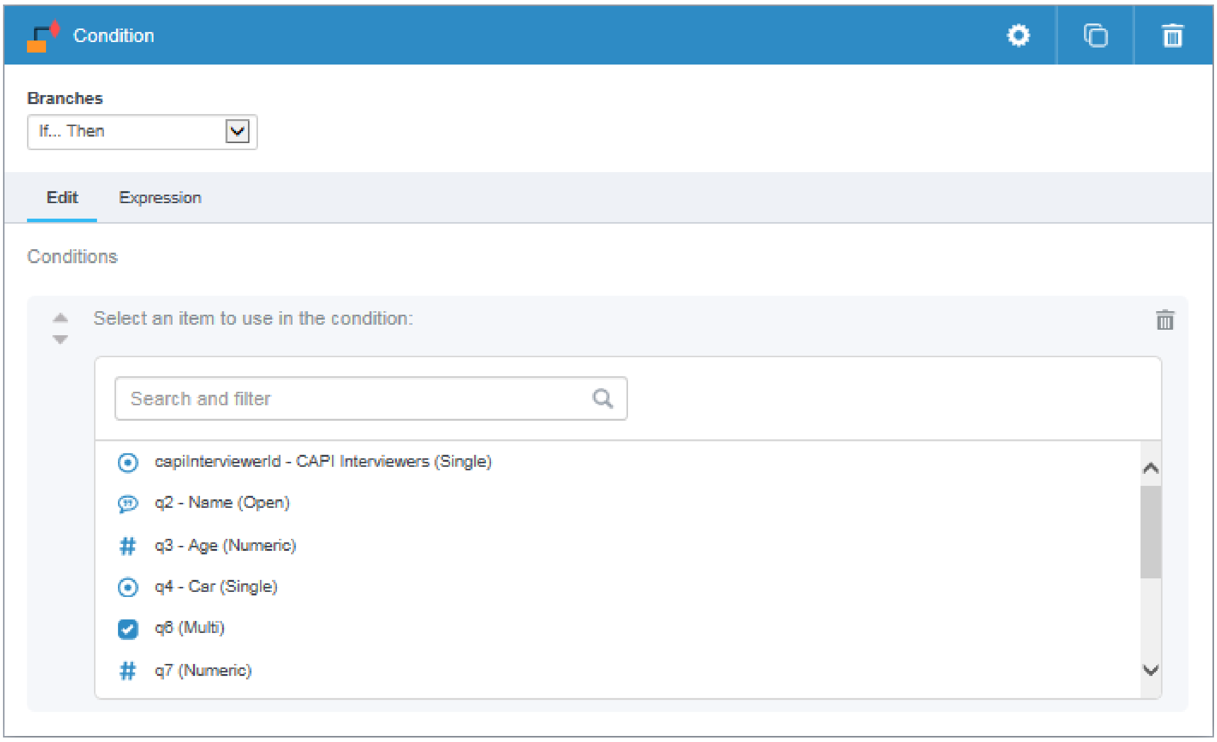


Figure 65 The Condition node's details page

4.4.23. The Script Node

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

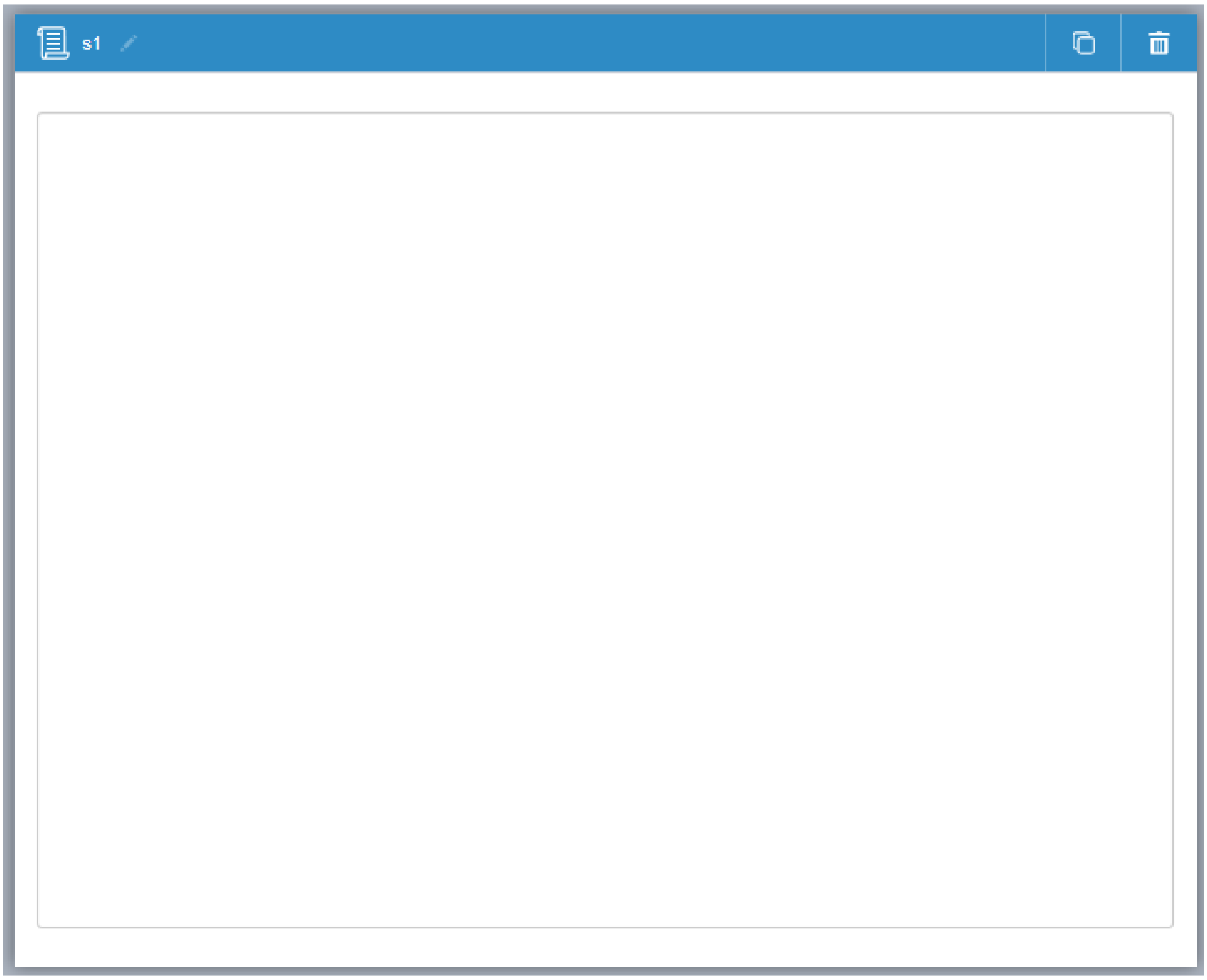


Figure 66 The Script node's details page

Example:

You can use a script object 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.

4.4.24. The Page Break Node

This is a preset variation of the Directive node (see The Directive Node on page 55 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.

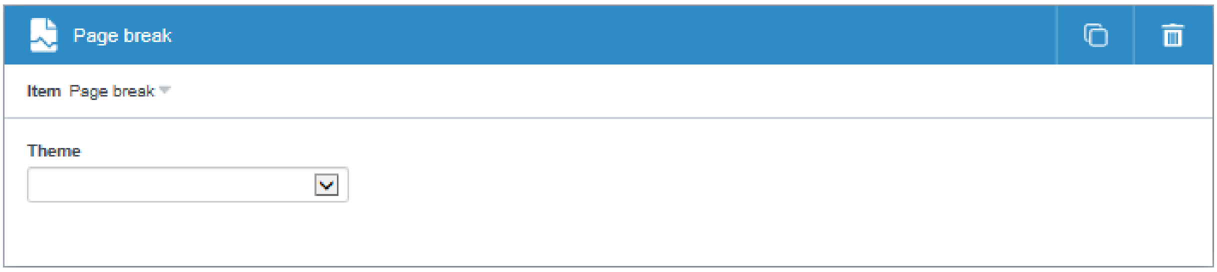


Figure 67 The Page Break node's details page

4.4.25. 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 54 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.

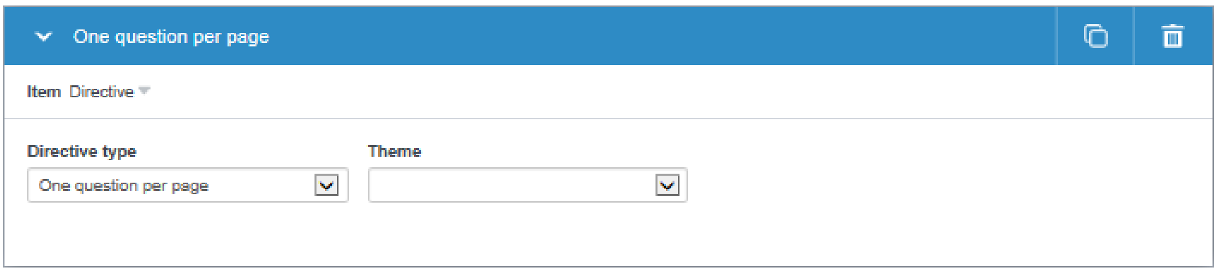


Figure 68 The Directive node's details page

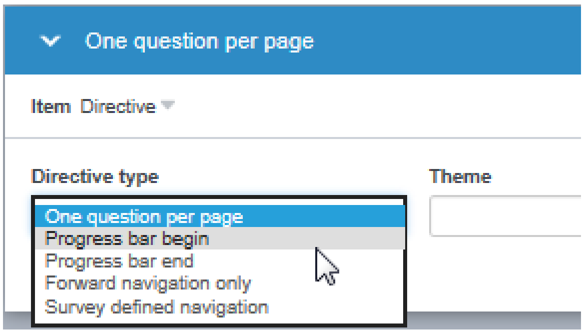


Figure 69 Selecting a Directive type

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 15 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.

4.4.26. 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.

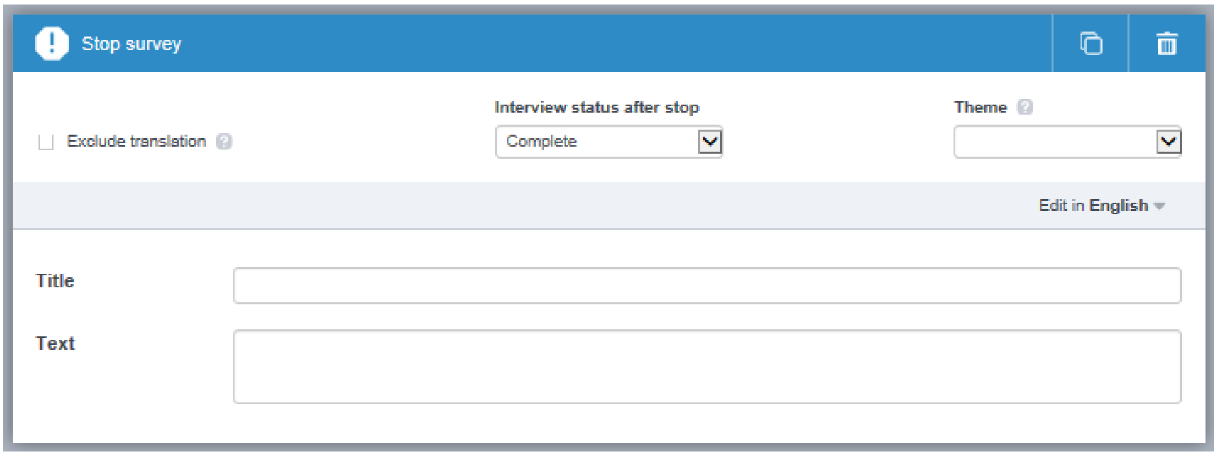


Figure 70 The Stop node’s details page

- **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 object. The options are:
  - o **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.
  - o **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.
  - o **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.

  - o **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.

4.4.27. The Email Node

You can send email 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 cog-wheel icon for an item in the survey column at the place where you wish to insert the email object, choose **Add item before** or **Add item after** as appropriate, then select the **email** object from the Add item overlay.

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

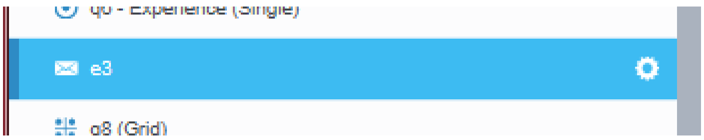


Figure 71 The Email Details page for setting up an email to be send from within a questionnaire

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

4.4.28. The Chart Node

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

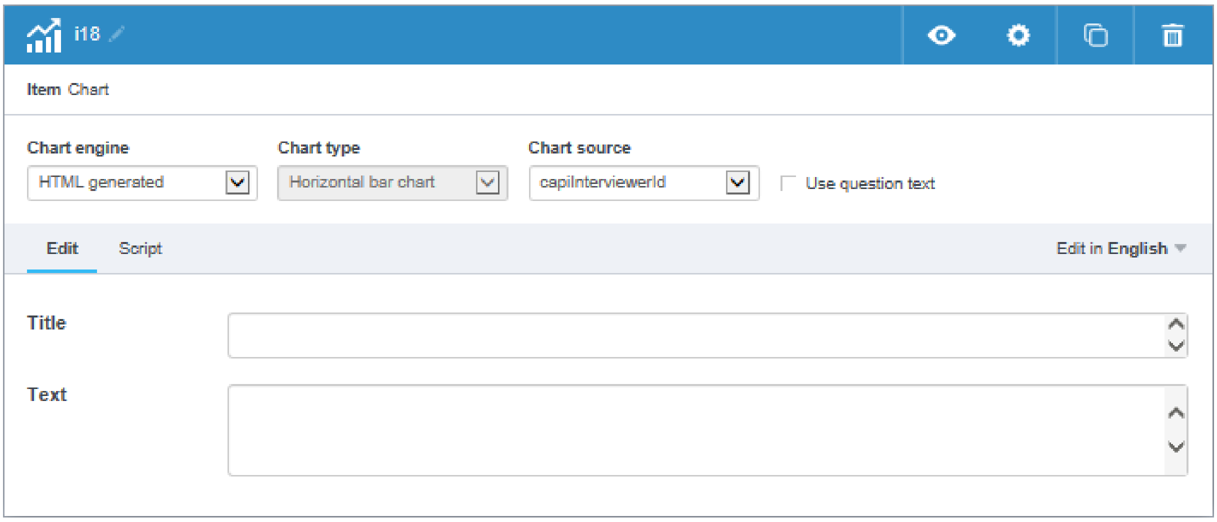


Figure 72 The Chart node's details page

The fields and options are:

- **Chart engine** - the application used to generate the chart. The Chart object 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 object 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 object 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.

4.5. How to Add Objects to the Survey

Once the survey exists you can start to add the required questions and nodes (see Object Types on page 34 for more information). To add an object:

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 objects then you have three options available to you:

o You can highlight an existing question, click on the **Edit** icon to open the drop-down menu and select **Add item before** or **Add item after** as appropriate.

o You can click on an existing object to open its survey details page, then click the green **+ Add before** or **Add after** button as appropriate.

In both cases this opens the Add item overlay.

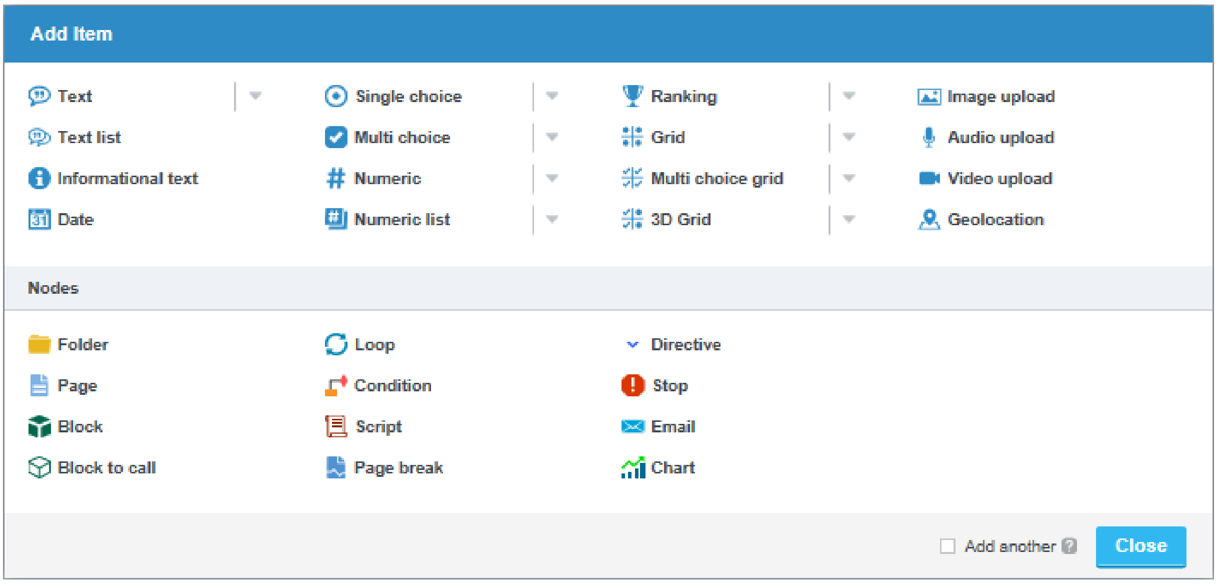


Figure 73 The Add Item overlay

o If you wish to create an item that is similar to an existing item, then you can click on the existing object to open its survey details page, then click the **Duplicate** button in the upper-right corner of the page. 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.

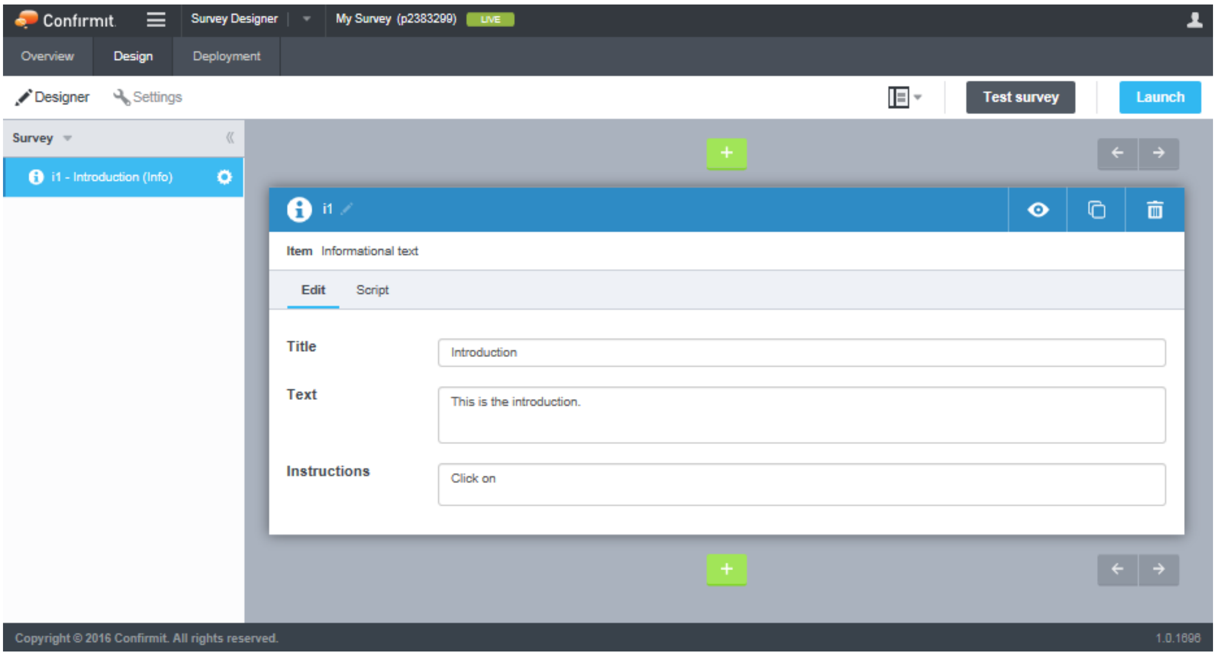


Figure 74 Adding an item to the survey

Here you add the title, text, instructions, answer options and edit other details as required for the object (see Editing an Object on page 60 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. 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. Editing an Object

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

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 object 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 page 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 67 for more information).

All questions are given a Question identification (qid) when they are created (see The Question ID on page 61 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.

These fields have a text formatting toolbar (see The Text Formatting Toolbar on page 63 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 62 for more information) and select **Show HTML Source**.

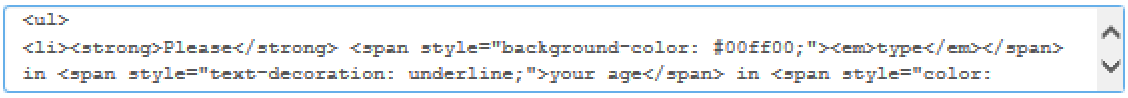


Figure 75 Example of a text field showing the HTML source code

4.6.1. The Object Toolbar

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

Figure 76 Example of an object's toolbar

The items and tools in the toolbar are as follows:

1. The object icon. This is different for each type of object and indicates the object type.
2. The object's question ID (qid). This must be unique for the survey (see The Question ID on page 61 for more information).
3. The qid **Edit** icon. Click to open the field so you can change the question ID.
4. **Preview** - opens a preview window so you can see how the question will appear to the respondent.
5. **Duplicate** - creates a copy of the current object in the survey designer (see Duplicating Objects on page 65 for more information).
6. **Delete** - deletes the current object (see Deleting and Restoring Objects on page 65 for more information).

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

4.6.2. 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 white space. 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.

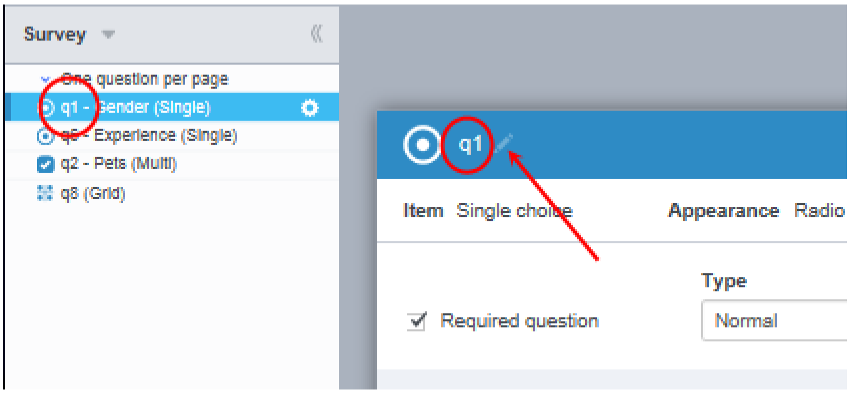


Figure 77 The qid for a question is displayed in the survey designer and in its details page

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.

4.6.3. The Item Editor Menu

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

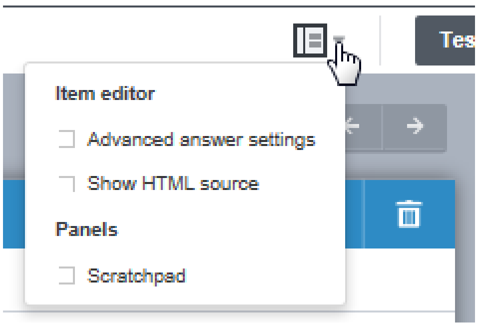


Figure 78 The Item Editor drop-down menu

Click the button to open the Item Editor menu, which holds a number of options:

- **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 86 for more information).
- **Show HTML source -** displays the HTML source code for all text fields in a question details page.
- **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 99 for more information).

4.6.4. 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 79 The text formatting toolbar

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

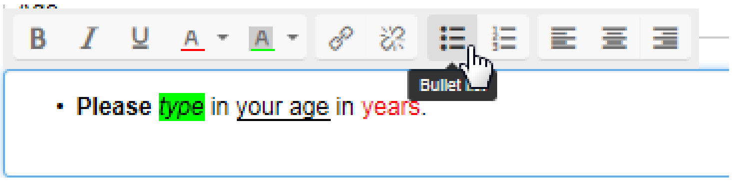


Figure 80 Using the text formatting tools

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.

4.7. Moving Objects Within the Survey

If you need to move a question or a node to a different location in the survey, there are several ways to achieve this.

Drag-and-Drop:

1. In the survey designer column, click on the object 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 object will be placed when you drop it.
2. When the object is in the desired location, drop it into position.

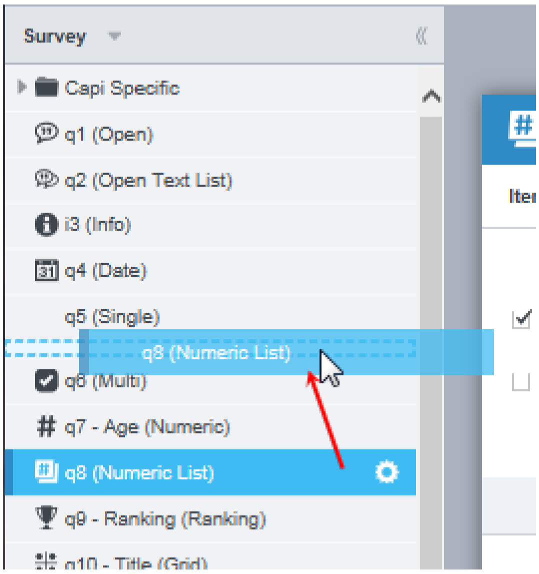


Figure 81 Dragging an object to a different location in the survey

If while you are dragging an object you decide it should not be moved (maybe you took the wrong object), press the **Escape** key on your keyboard before you drop the object to cancel the drag operation. Note that once you have dropped it then it will be positioned in the new location and if you don't want it there then you will have to move or drag it away.

If you move an object 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 go to the change log on the Overview page and use the Undo feature.

Figure 82 The Undo move button in the save message

Moving:

1. For the item you wish to move, click on the additional functionality icon to open the drop-down menu, and select **Move**.

   The Move Item overlay opens.

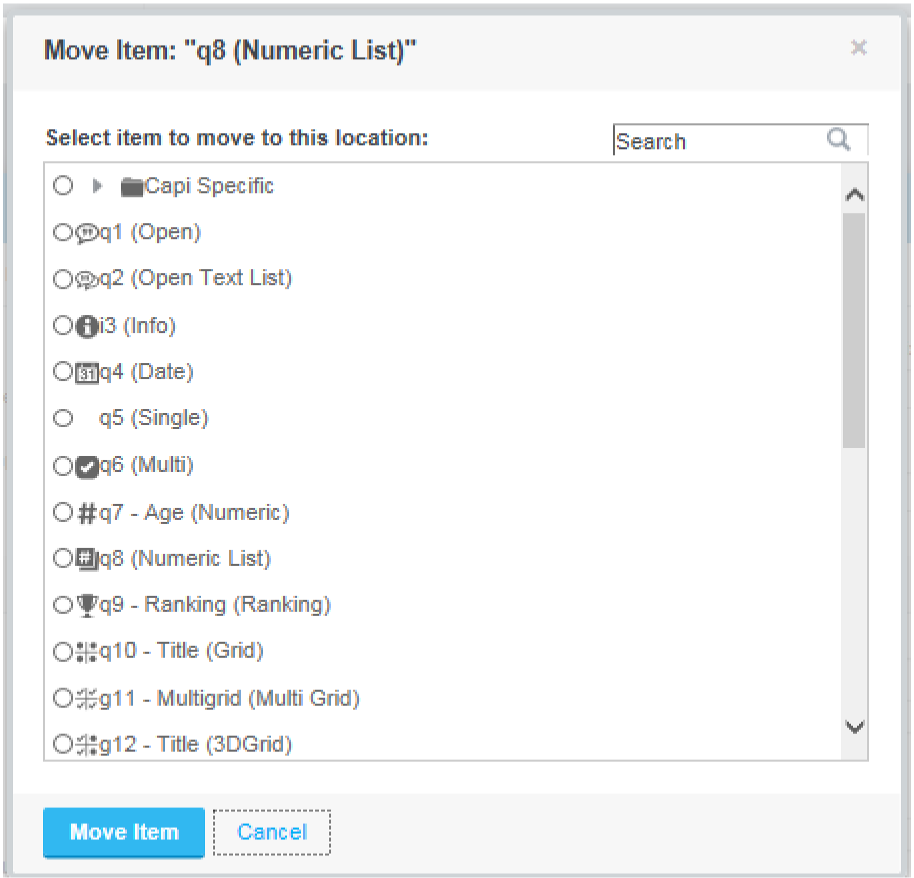


Figure 83 Example of the Move Item overlay

2. Decide where you wish to move the item to, and select the item immediately above the new location.

3. Click **Move Item**.

   The item you selected in step 1 of this procedure is moved to the location immediately after the item you selected in step 2.

4.8. Duplicating Objects

If you wish to add to your survey an object that is very similar to one that you have already created, you can save time by duplicating the existing object 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 object and click the **Duplicate** button in the upper-right corner of the question details page.

A new object 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 object will have the next qid in the sequence. You can now edit the new object as required (see Editing an Object on page 60 for more information), and move it to the desired location in the survey (see Moving Objects Within the Survey on page 63 for more information).

4.9. Deleting and Restoring Objects

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

1. Either open the object and click the **Delete** button in the upper-right corner of the question details page, or left-click on the object in the Survey column and select **Delete** from the drop-down menu.

   A confirmation box is displayed.

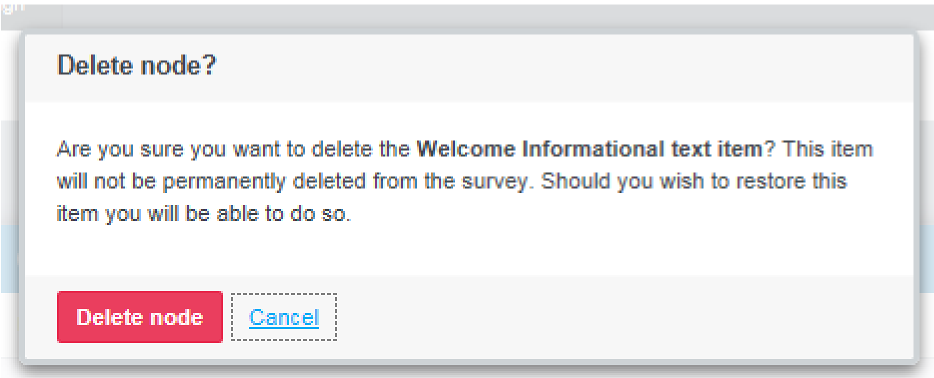


Figure 84 The confirm deletion message box

2. Confirm the deletion or cancel the operation.

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

If you later wish to restore an object:

1. Left-click on the header of the Survey column.

   The Survey menu opens.

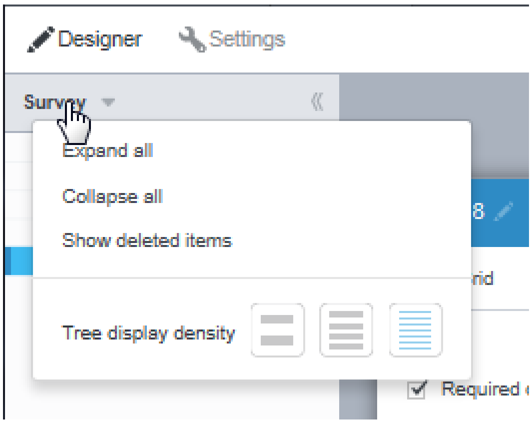


Figure 85 The Survey menu

2. Click **Show deleted items**.

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

Any objects that have been deleted are displayed in the Survey pane, grayed out.

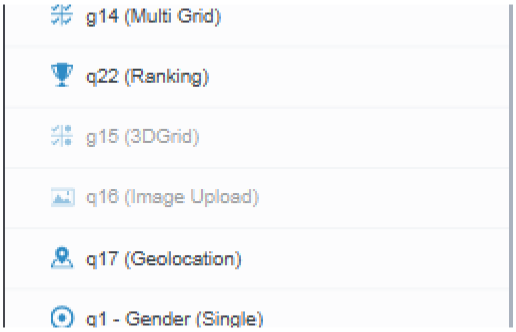


Figure 86 The deleted nodes are listed

3. Place the pointer onto the item you wish to restore to show the cog-wheel icon, then click the icon to open the drop-down menu.

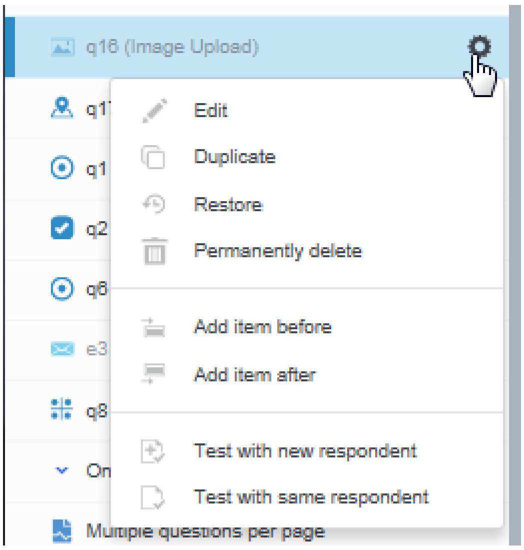


Figure 87 The survey item's cog-wheel menu

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

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

4.10. 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 page (see Properties on the Question Details Page on page 67 for more information).

The Question Details page 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 78 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 97 for more information).

4.10.1. Properties on the Question Details Page

To display a question's properties, start by clicking on the question in the survey column 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 property sheet accessible via the **Properties** icon in the question details page toolbar (see The Properties Sheet on page 78 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.

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 70 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-objects, 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] 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.
- **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]. 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.
- **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.
- **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.
- **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 86 for more information). All the columns are described in the Answer List Columns section (see The Answer List Columns on page 86 for more information).

4.10.1.1. 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. Many of the Appearance property 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.

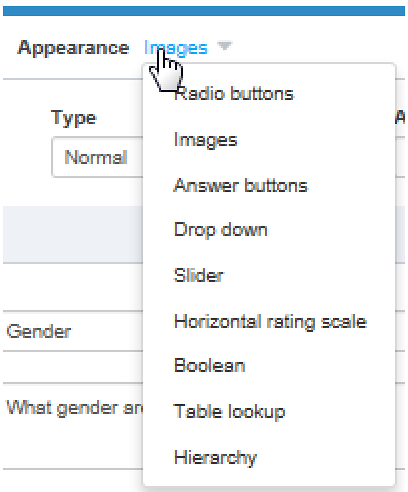


Figure 88 Accessing the Appearance options

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 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>.
- **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 80 for more information).
- **Hierarchy -** [Single] the answers are taken from table(s) set up in “Database Designer” (see Hierarchy Questions on page 81 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 72 for more information).
- **Rating list - Star rating** - [Grid] displays star shapes instead of a grid (see Star Rating on page 77 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 73 for more information).
- **Ranking grid - Card sort** - [Grid] presents the answer options as a card-sort layout (see Card Sort on page 75 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 75 for more information).
- **Carousel -** [Grid] changes the answer layout from a tabular format to Carousel format (see Carousel on page 76 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 77 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.

4.10.1.2. Grid Bars

This option displays the scale values as a horizontal bars as shown below.

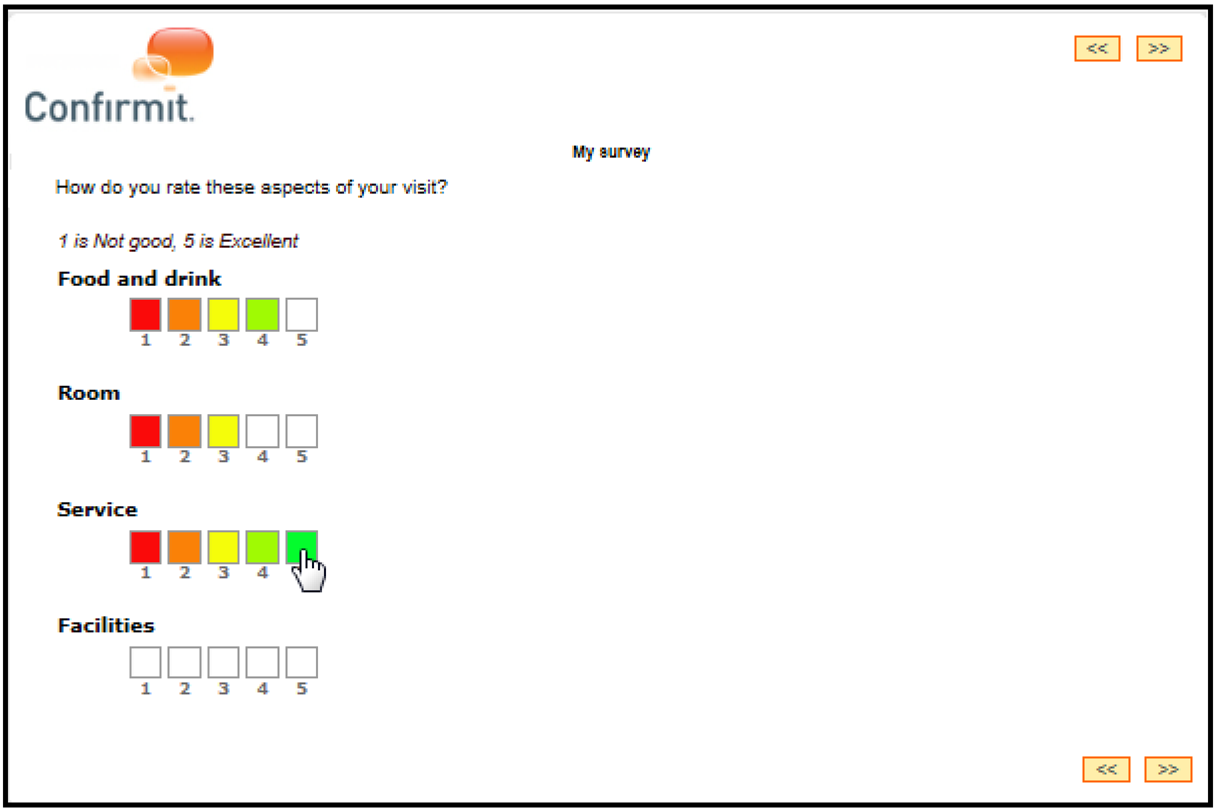


Figure 89 An example of a Grid question with the grid bars layout

Any number of grid boxes can be used; one will be displayed for each scale option in the grid.

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.

4.10.1.3. Horizontal Scale

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

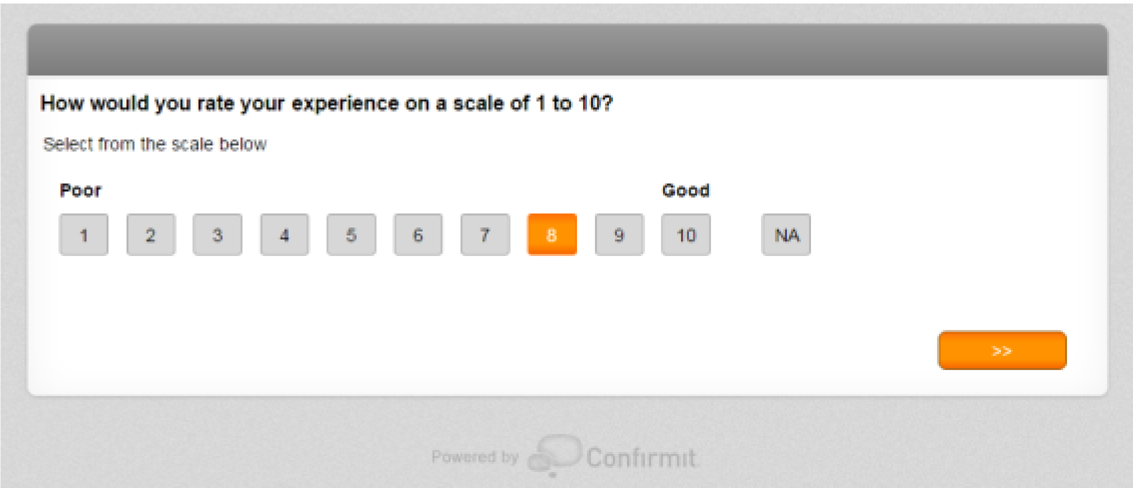


Figure 90 Example of a Single question using the Horizontal Scale option

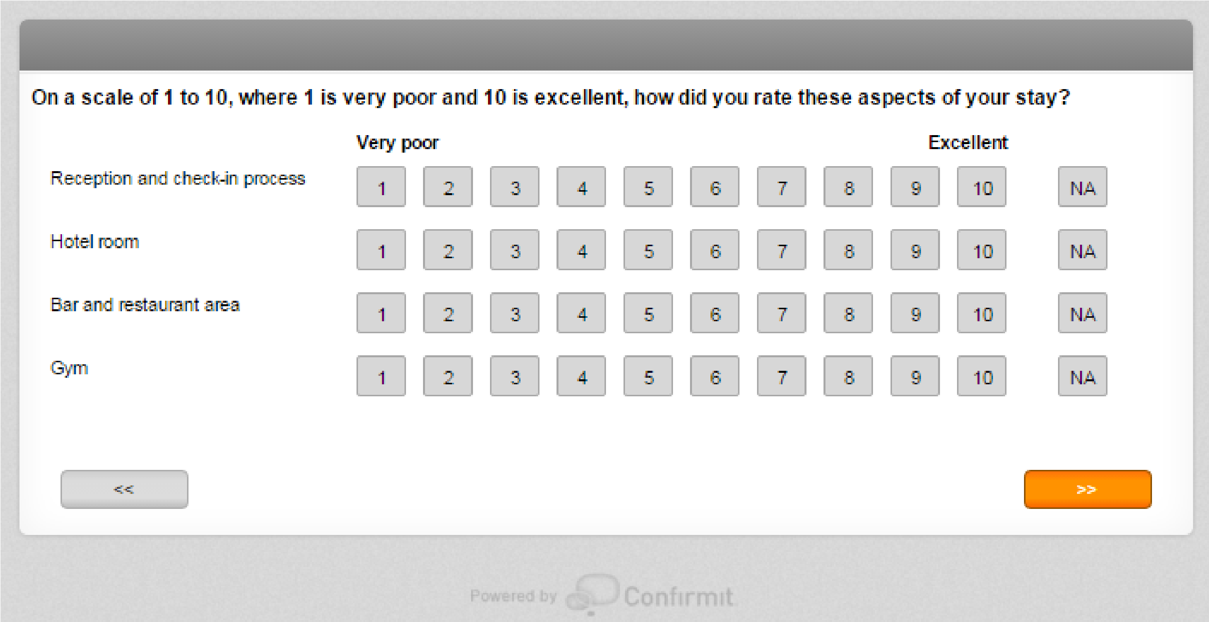
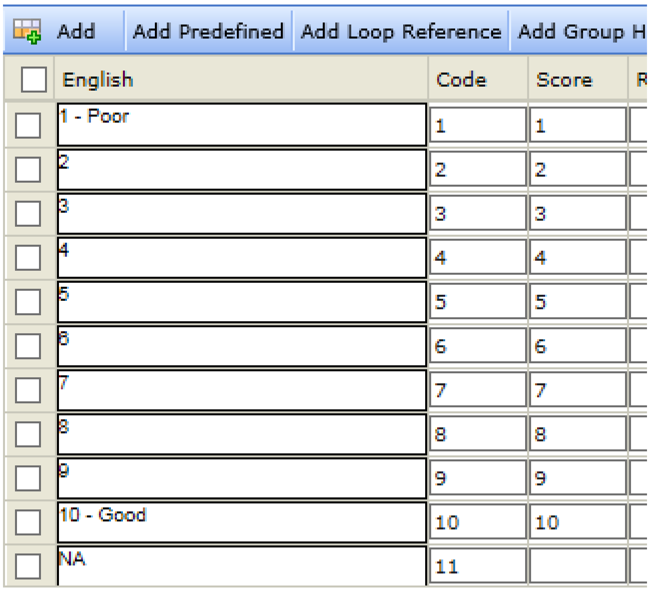


Figure 91 Example of a Grid question using the Horizontal Scale option

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.



English	Code	Score
1 - Poor	1	1
2	2	2
3	3	3
4	4	4
5	5	5
6	6	6
7	7	7
8	8	8
9	9	9
10 - Good	10	10
NA	11	

Figure 92 The question's Answers list

When the Horizontal Rating Scale property is selected, the “Exclude non-scored elements from scale” sub-option becomes available. This removes any answer options that do not have a score (see The Answer List Columns on page 86 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 (see **NA** in the figure above) it will not affect your results.

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.

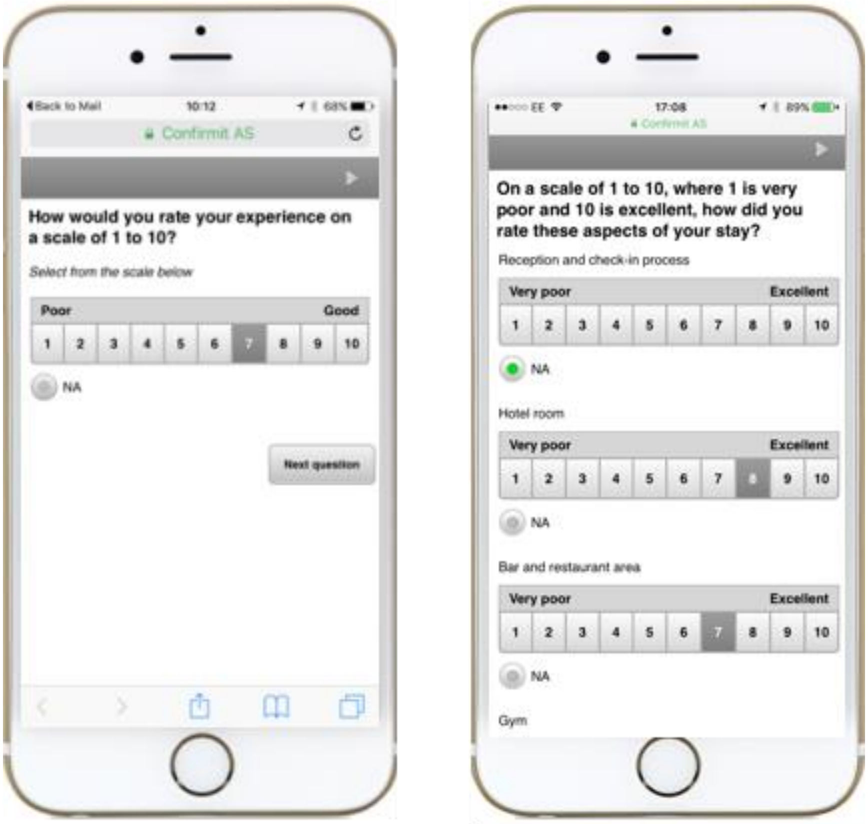


Figure 93 The same Single and Grid questions rendered on mobile

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.

4.10.1.4. 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.

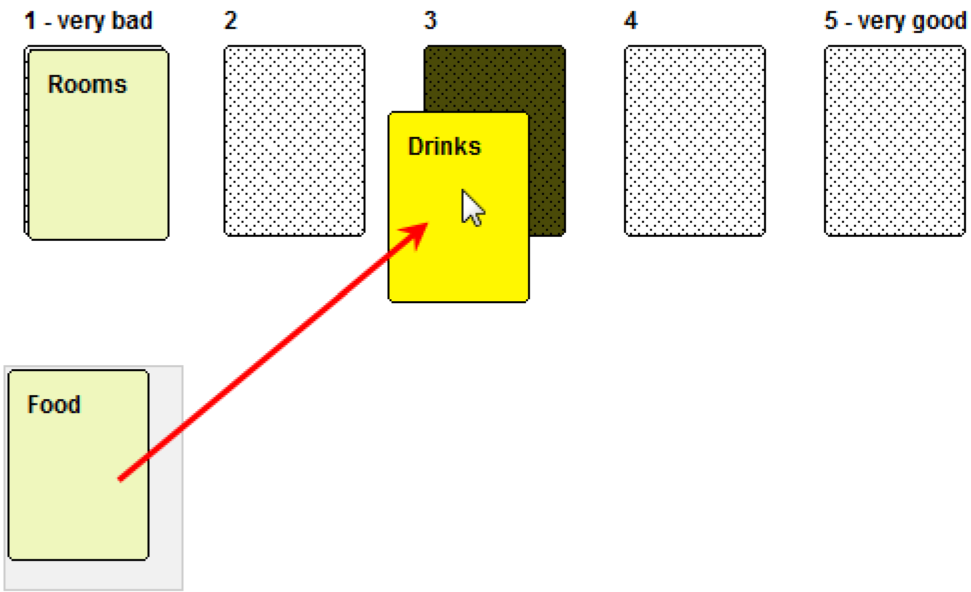


Figure 94 Dragging the question cards into the answer areas

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.

4.10.1.5. 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.

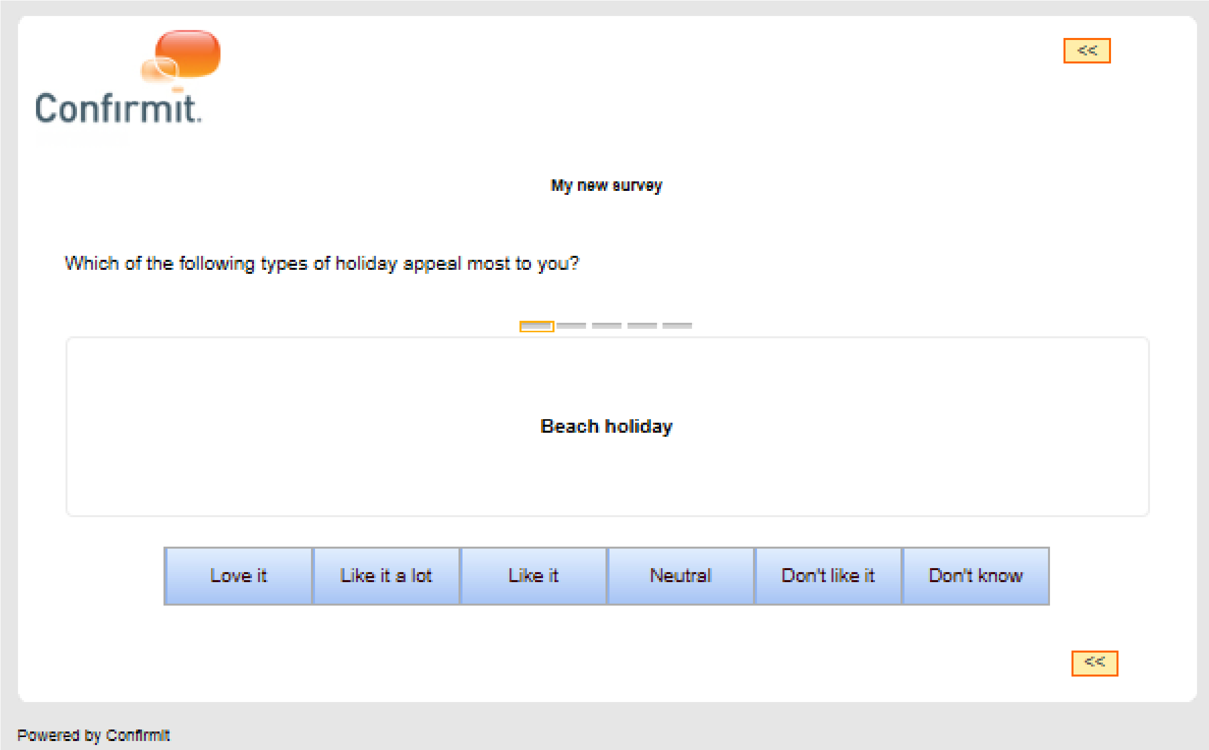


Figure 95 An example of a Grid question with the Carousel layout

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.

4.10.1.6. 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.

Figure 96 Example of using Start Rating

Any number of stars can be used; one will be displayed for each answer option in the grid. Note that 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.

4.10.2. The Properties Sheet

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 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.
- **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.
- **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 80 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 -** check if you wish to prevent report designers using this question in a report. Note that this also includes Instant Analytics reports.
- **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. Multiple categories can be entered in the field; separate using the semi-colon character, for example Food;Drink.
- **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.

4.10.2.1. 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.

4.10.3. 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. 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.
- **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.

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.

4.10.4. Table Lookup Questions

The Table Lookup Appearance option is only available for Single 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.

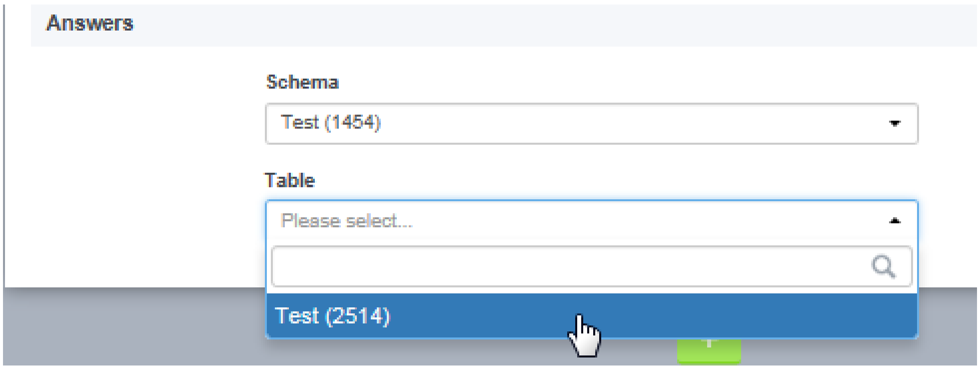


Figure 97 Example of the Table Lookup fields

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 designer.

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.

4.10.5. Hierarchy Questions

The Hierarchy Appearance option is only available for Single 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.

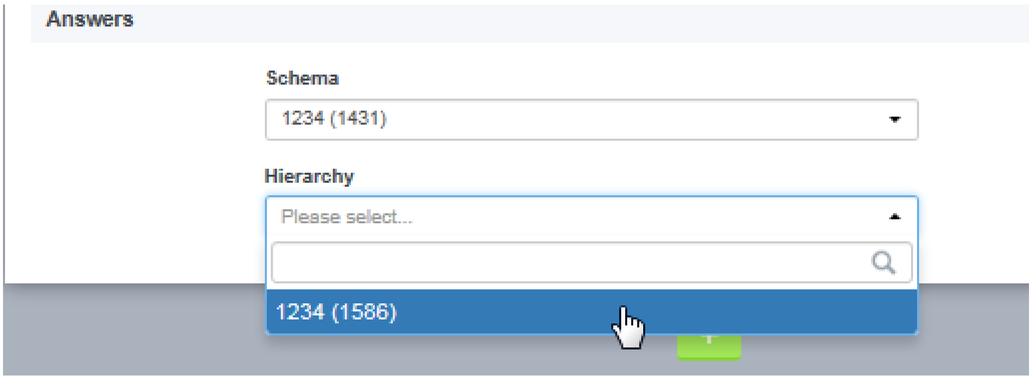


Figure 98 Example of the Hierarchy fields

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.

4.11. Answers, Prompts and Scales

A list of answer options from which the respondent can select the desired answer to the question is required for all question types except Info, Date, Numeric and Open questions.

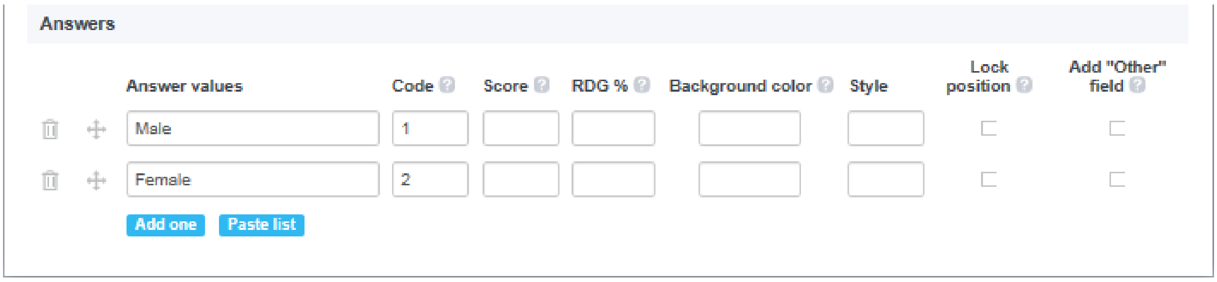


Figure 99 Example of the Answer fields for a Single question

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).

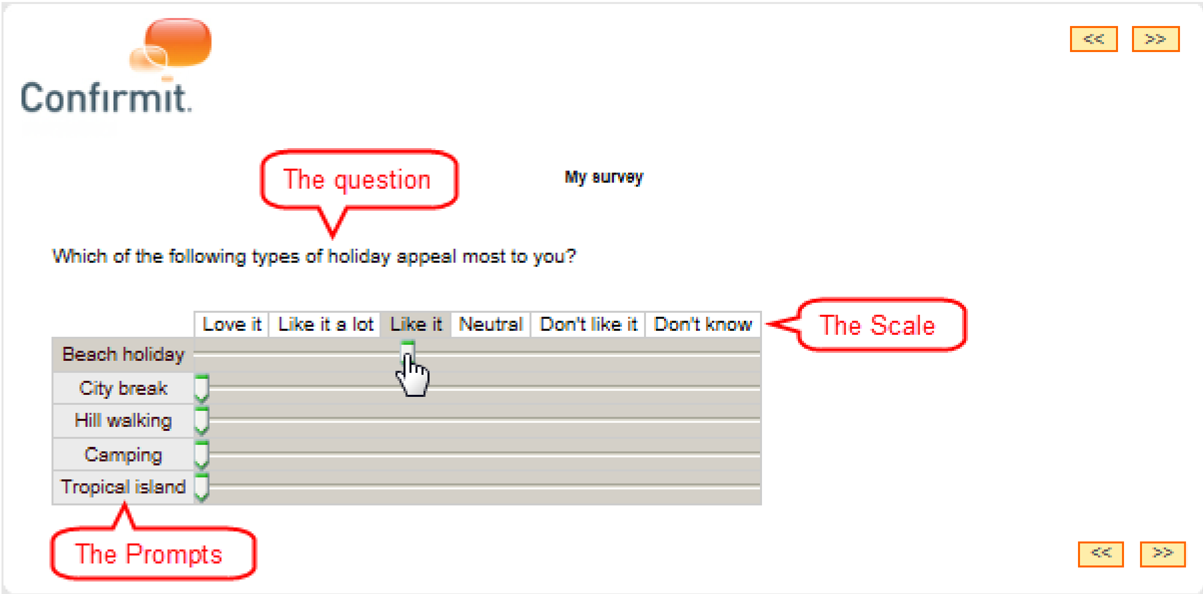


Figure 100 Example of the prompts and the scale for a grid question

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 86 for more information).

4.11.1. 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 86 for more information).

You can add the answer, prompt and scale items individually, or you can paste in a list that you have created earlier. 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.

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 **Enter** or 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 **Enter** or 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 67 for more information).

4.11.2. How to Paste a List

If your answer, 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 **Paste list**.

   The Paste a list overlay opens.

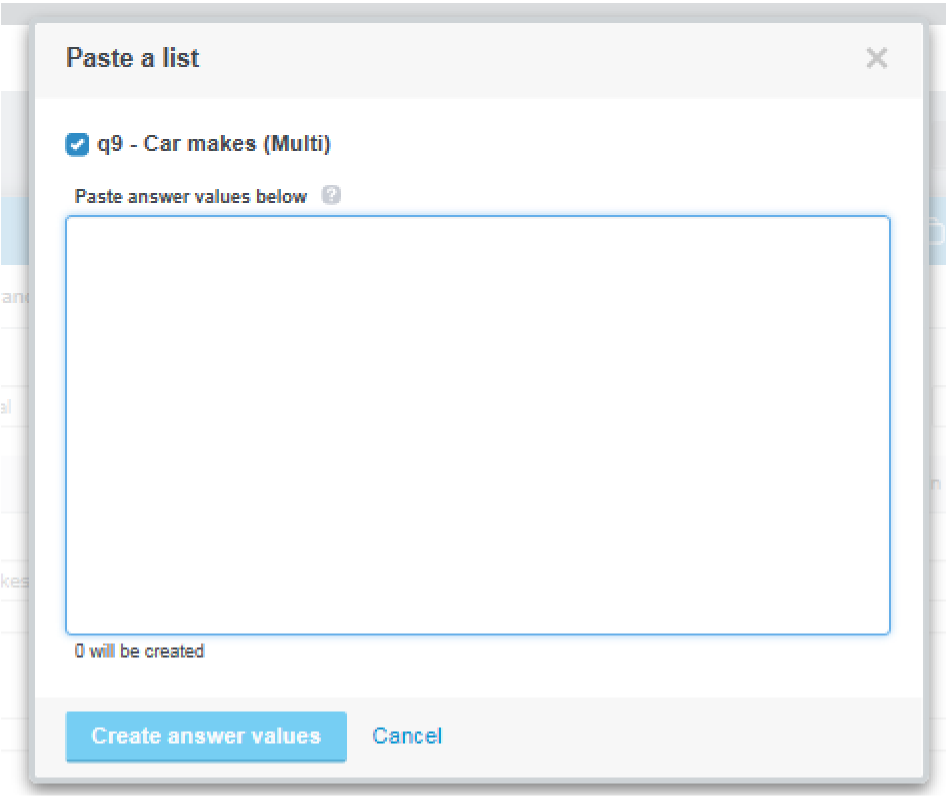


Figure 101 The Paste a list overlay

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.

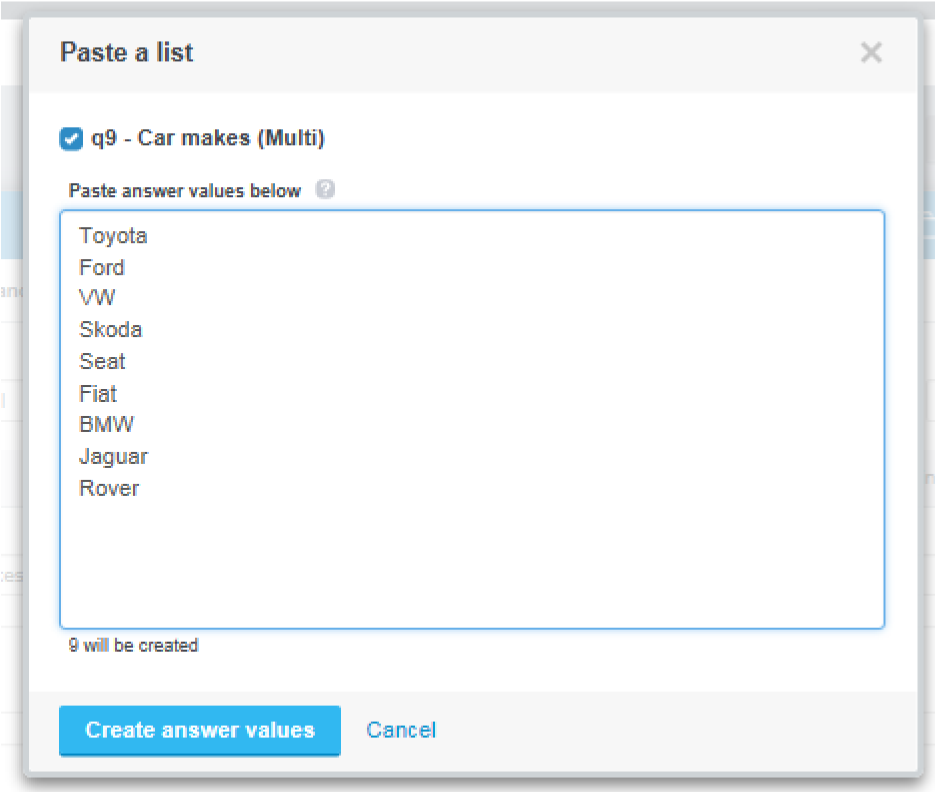


Figure 102 Copying the pre-recorded list into the overlay

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 ... values** (the appropriate list will be specified).

   The list is created in the question details overlay.

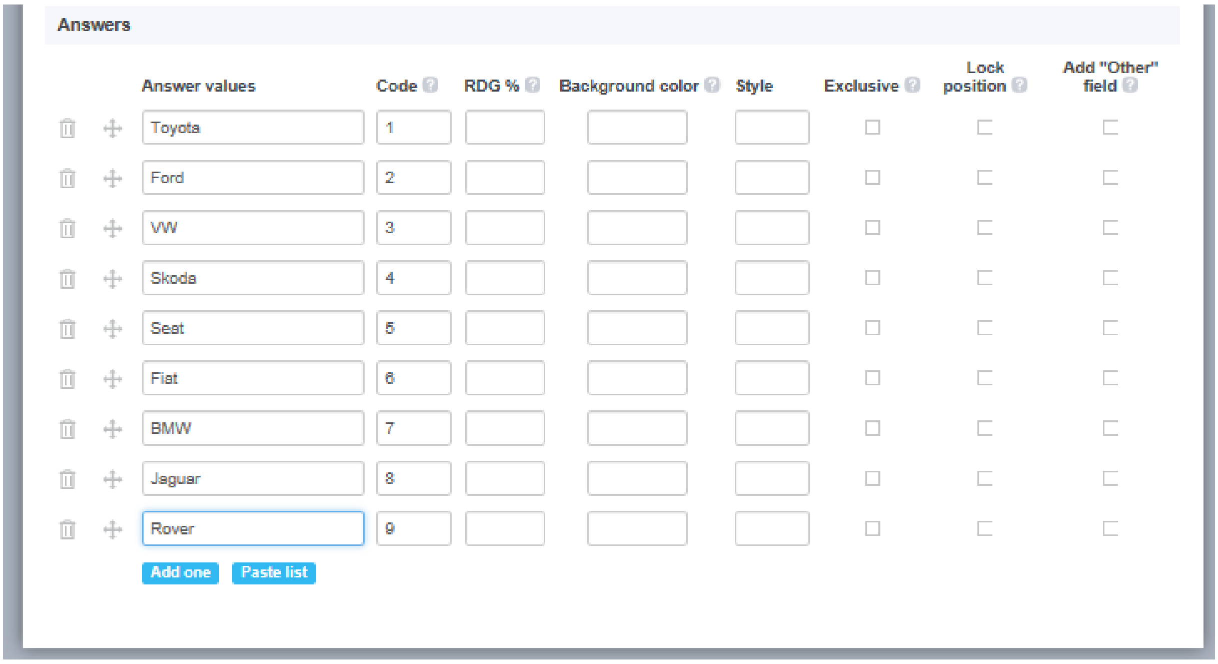


Figure 103 The completed answer list in the question

You can rearrange the items in the list if required, using the drag-and-drop button (see Moving Answers on page 87 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.

4.11.3. 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):

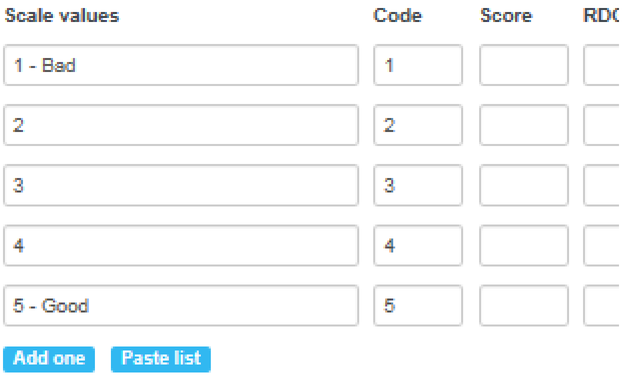


Figure 104 Scale setup

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

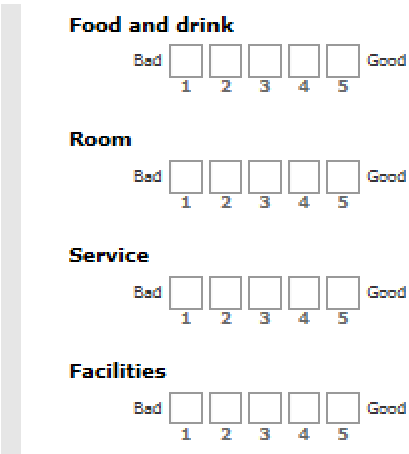


Figure 105 Resulting layout for a grid bar appearance

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.

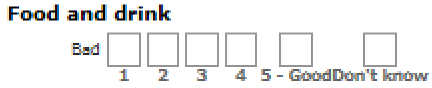


Figure 106 Attempting to combine hint texts and Don't know answer options

4.11.4. 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.

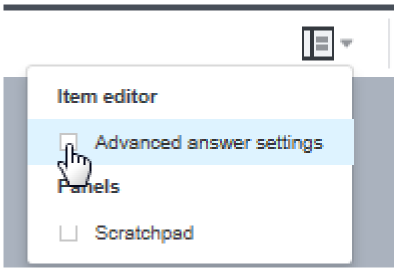


Figure 107 Activating the advanced answer settings

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 86 for more information).

4.11.5. 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 86 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 100 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.
- **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.

4.11.6. 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).

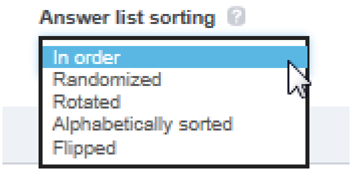


Figure 108 The Answer list sorting drop-down options

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 87 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.

4.11.7. 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 87 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 Object 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.

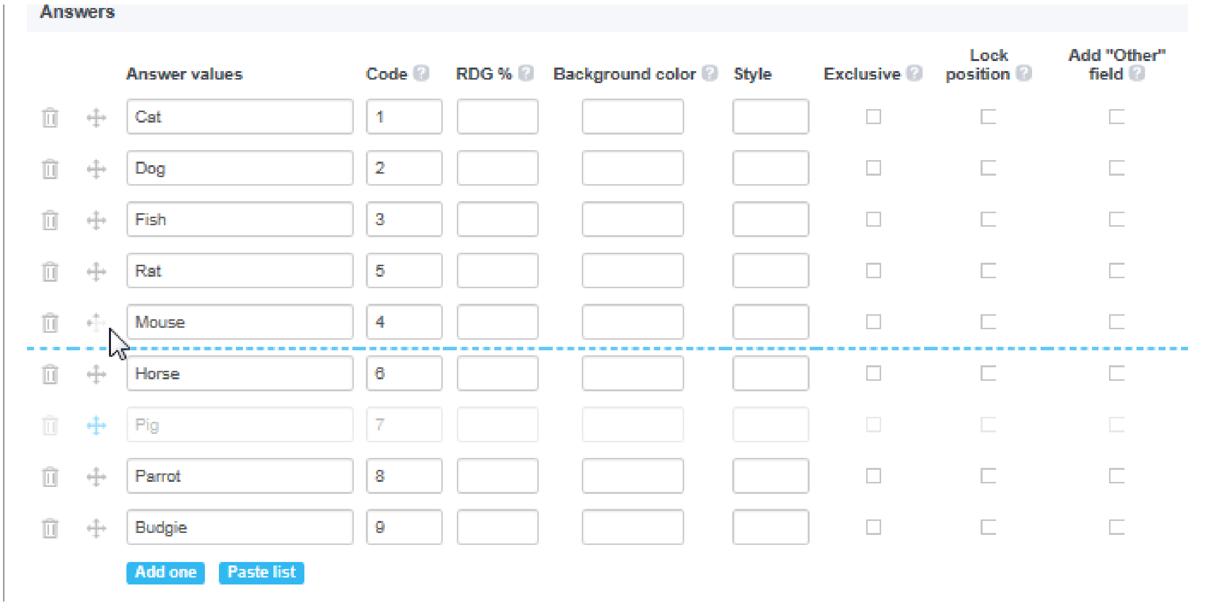


Figure 109 Moving an answer in the list

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

4.11.8. 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 88 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.

4.11.8.1. 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 down-arrow beside the Survey header and select **Reusable lists**.

   The Reusable lists page 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 left column 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.

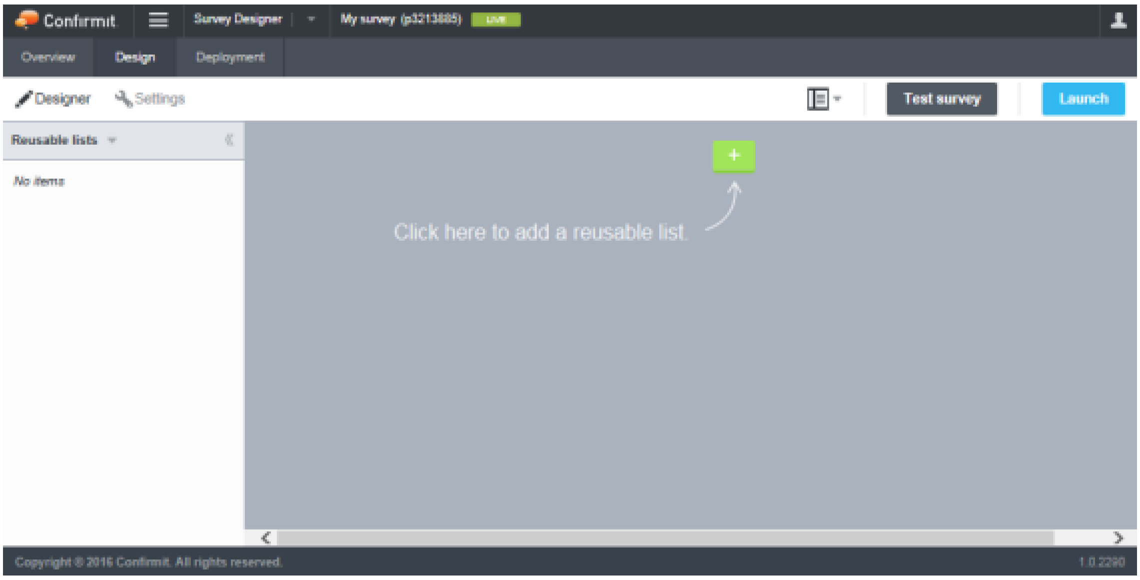


Figure 110 The Reusable lists page

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.

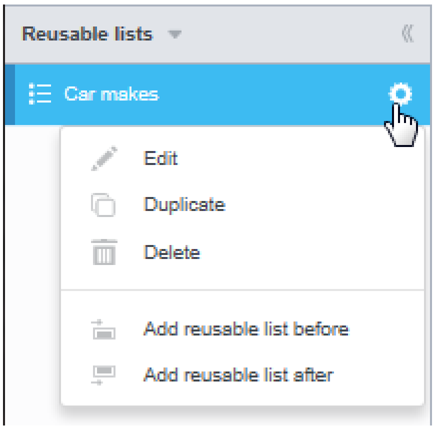


Figure 111 Adding another reusable list to the survey

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

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

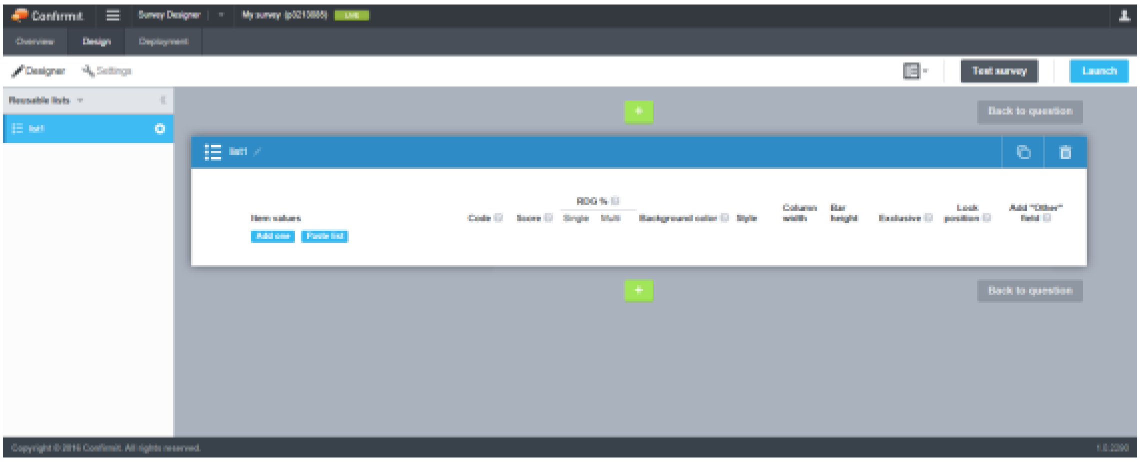


Figure 112 The Reusable list's details page

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.
6. 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.

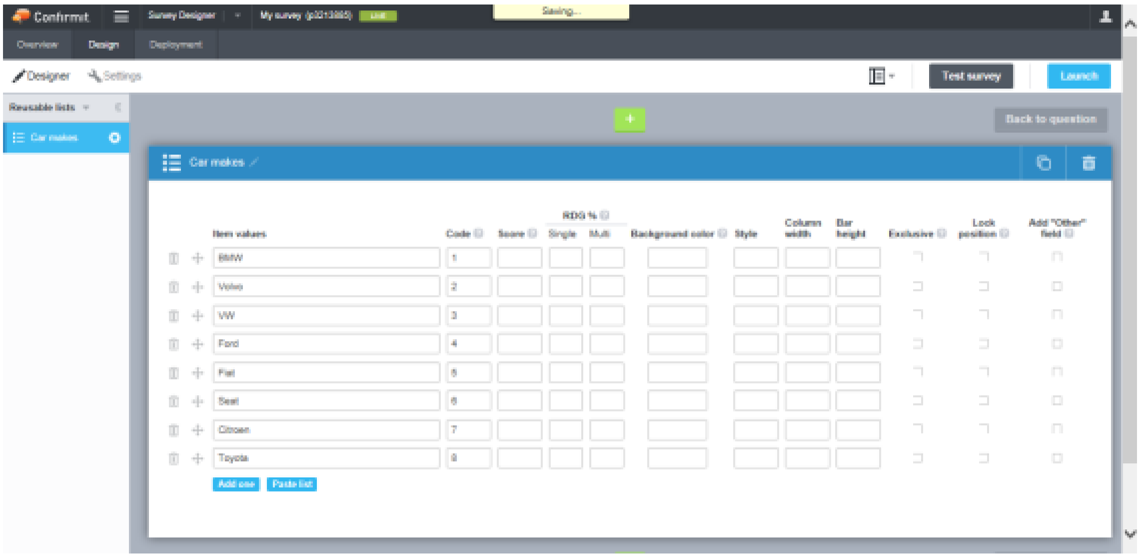


Figure 113 The completed list

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 reopen the reusable list directly. If you change the list, the changes will appear in all locations where you have used it.

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.

4.11.8.2. 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.

4.11.8.3. 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 page 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.

This functionality is not yet available - coming soon!

4.12. Conditions

Use Condition objects (see The Condition Node on page 52 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 object 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 objects in the THEN node. If the expression evaluates to FALSE, the objects 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 91 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 object 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

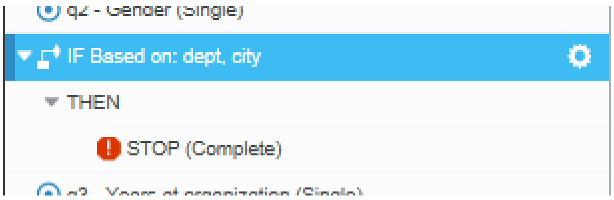


Figure 114 Example of a conditional object in a survey

You can create groups within conditions (see Condition Groups on page 95 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.

4.12.1. 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. 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 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 Objects to the Survey on page 58 for more information).
2. Open the node's Details overlay.

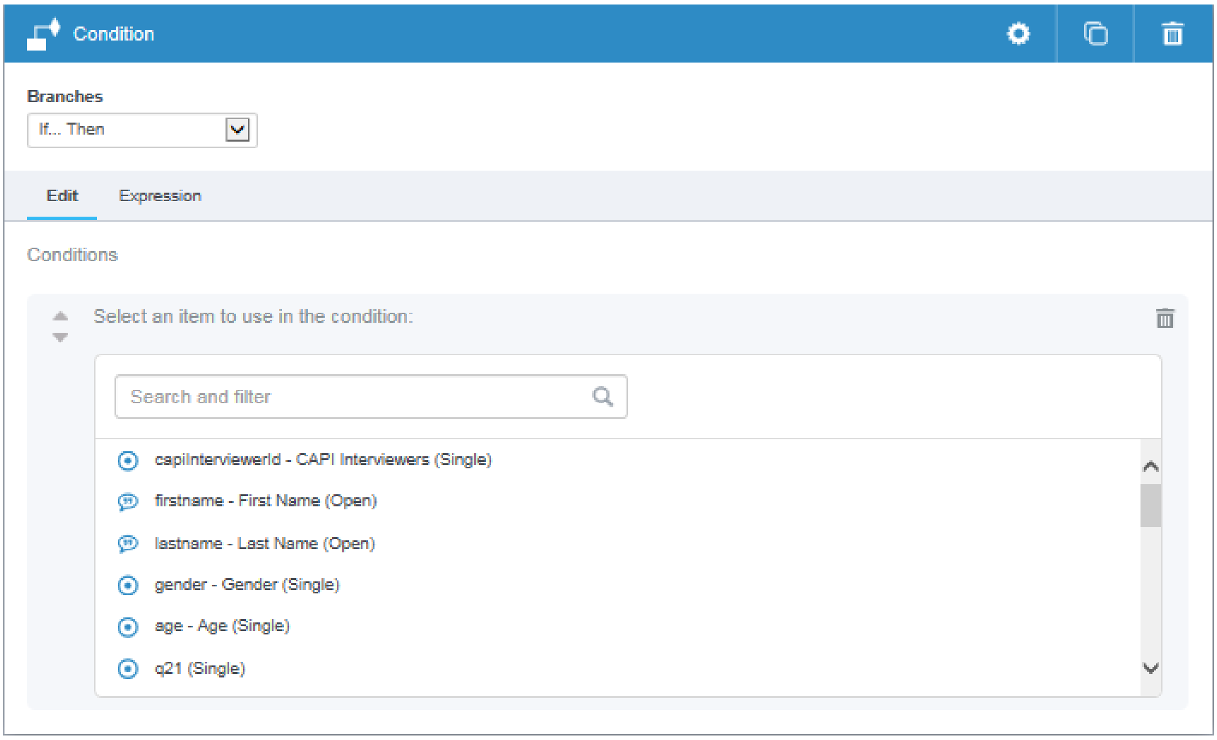


Figure 115 Example of the Details overlay for a Condition node

The Details overlay shows a list of all the questions in the survey on which the condition can be based, 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. Select the question 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.

Note: The exact procedure from here will depend on the type of question you have selected; different question types require different fields and options.

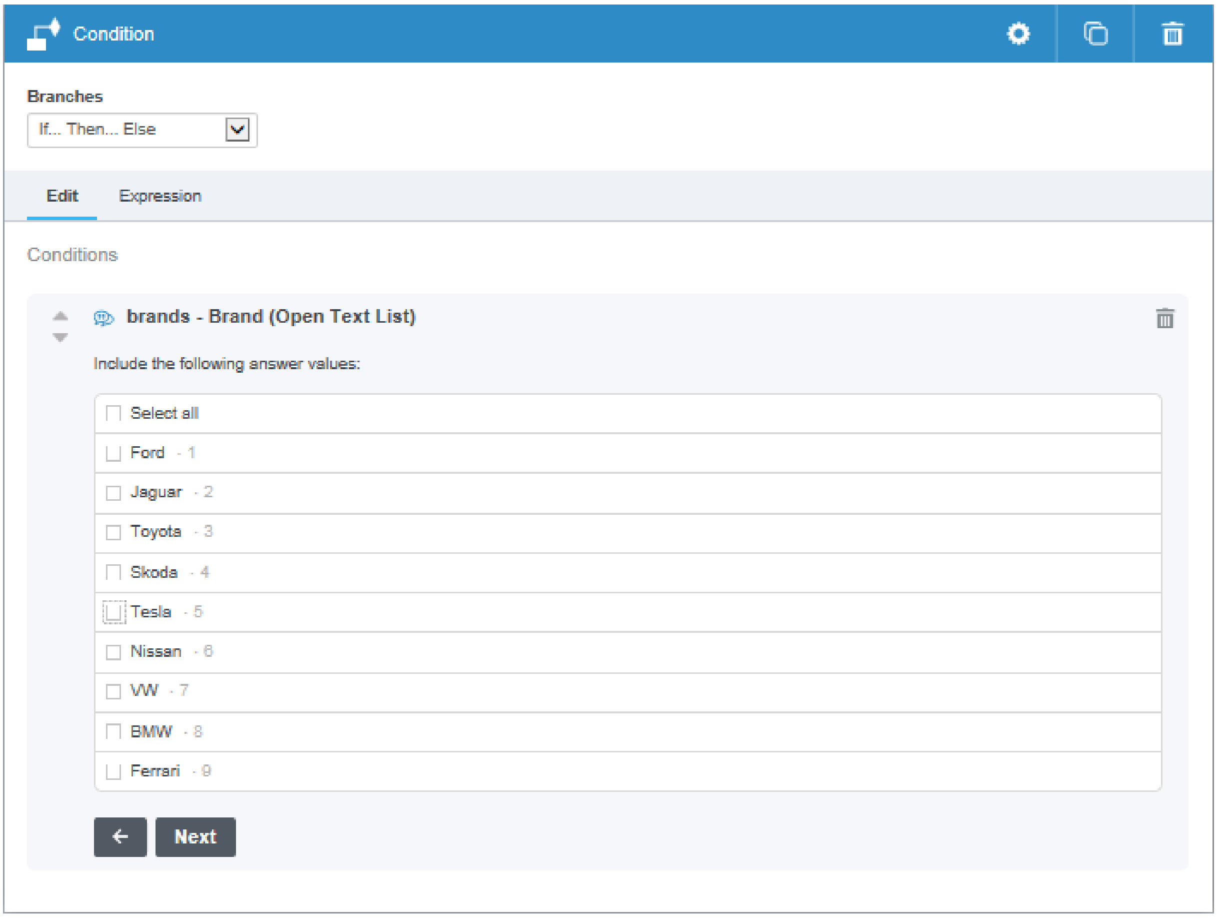


Figure 116 The answer options for the selected question

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.

6. Create the condition as required.

   If you select more than one answer option, for example in a multi question, then 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 below).

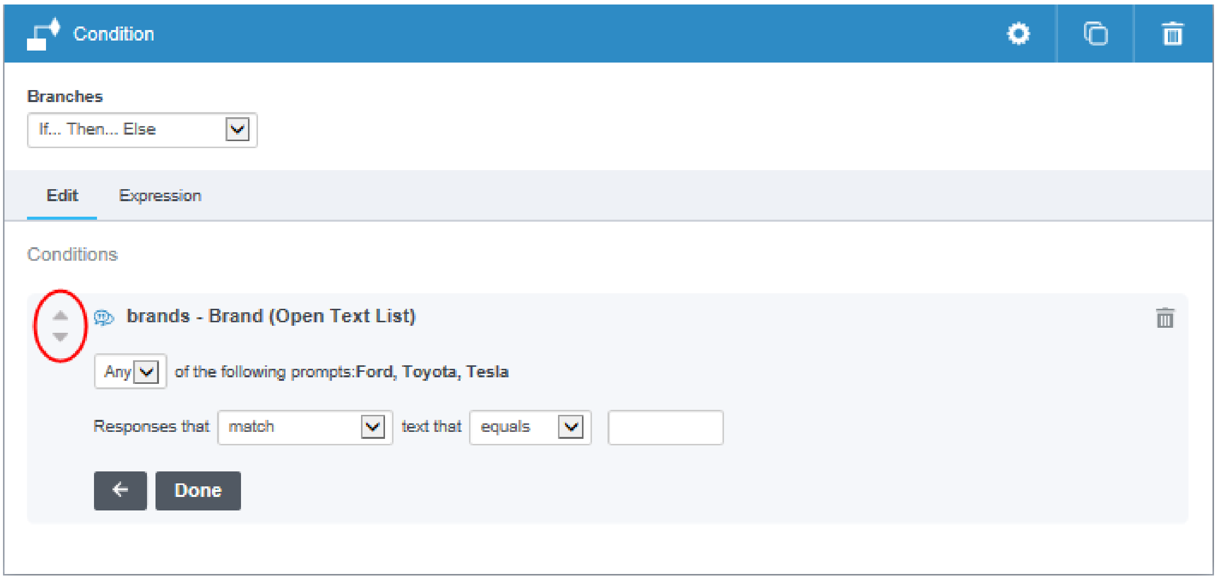


Figure 117 After selecting several answers from a multi question

7. On completion, 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. Note that you can add conditions within conditions to build multiple levels of logic.

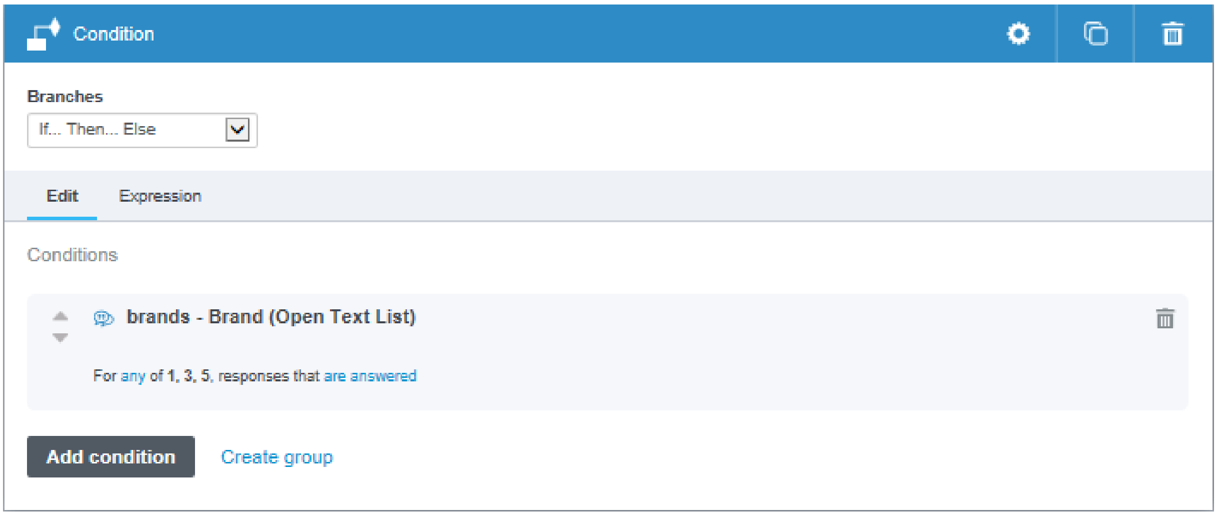


Figure 118 The condition summary

You now need to add the THEN clause that is to be enacted if the logic evaluates to TRUE.

8. In the survey pane, click on the THEN object.

Figure 119 Adding the THEN clause

9. Click the green **+** button in the design area to open the Add Item overlay (see How to Add Objects to the Survey on page 58 for more information), and add the object you wish to be enacted if the logic evaluates to TRUE.

   For example this could be a question or information object 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 object, 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 object in the same way as you added the THEN object.

10. Click the green **+** button to open the Add Item overlay (see How to Add Objects to the Survey on page 58 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 object. 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 12 for more information).

4.12.2. 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 office the respondent works at, 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 at a specific office 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 another office the same benefits, so you wish to add that office category to the condition.

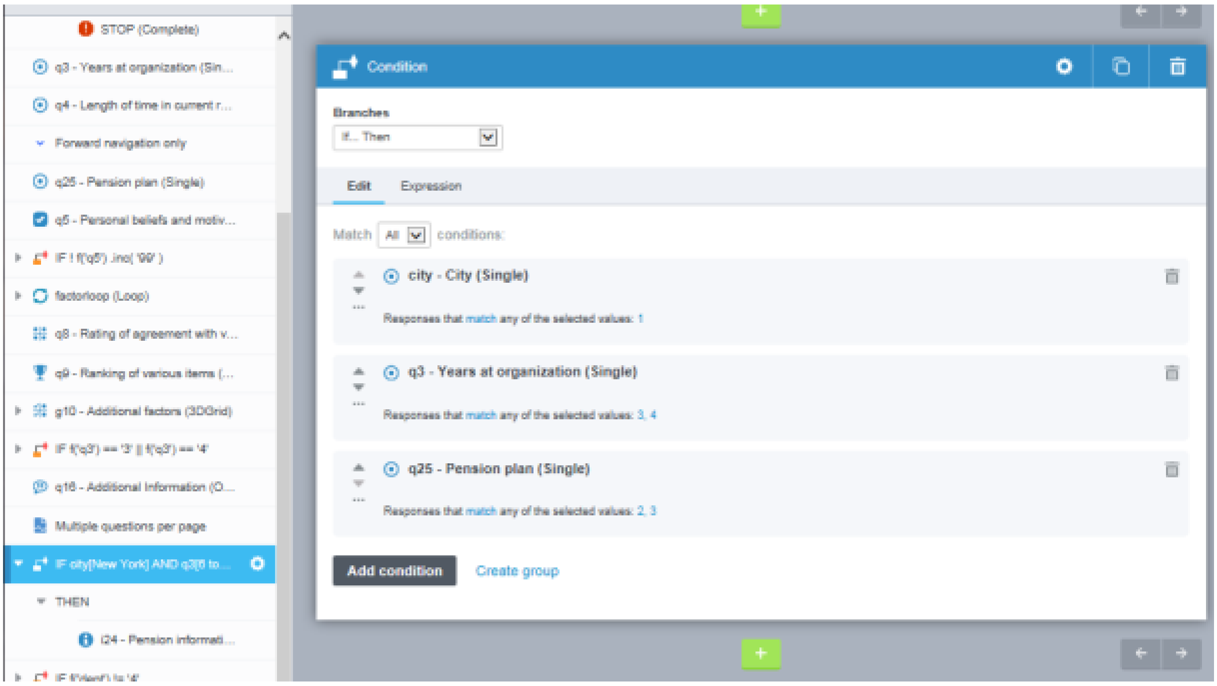


Figure 120 Example of a simple condition to display an information page to relevant employees

1. Add the new office category to the condition.

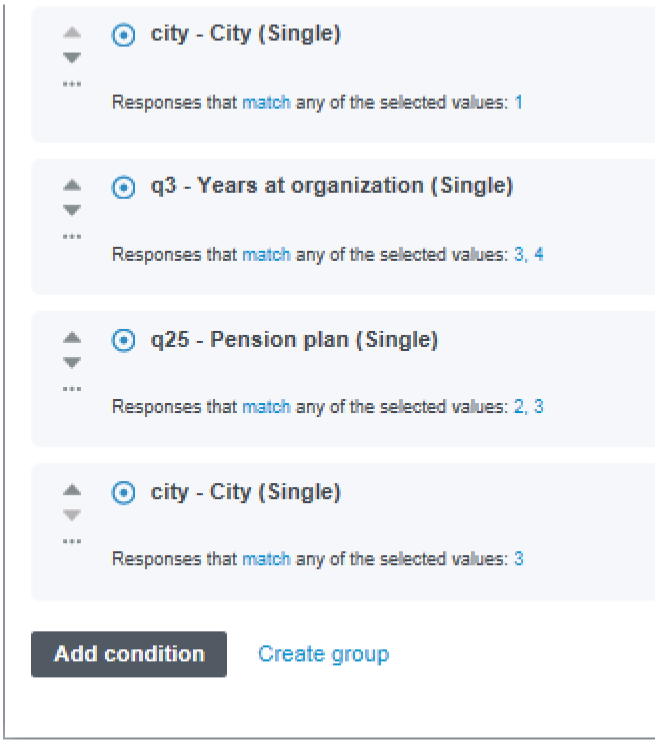


Figure 121 The additional city is added

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**.

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; in this example you would need **Any**.

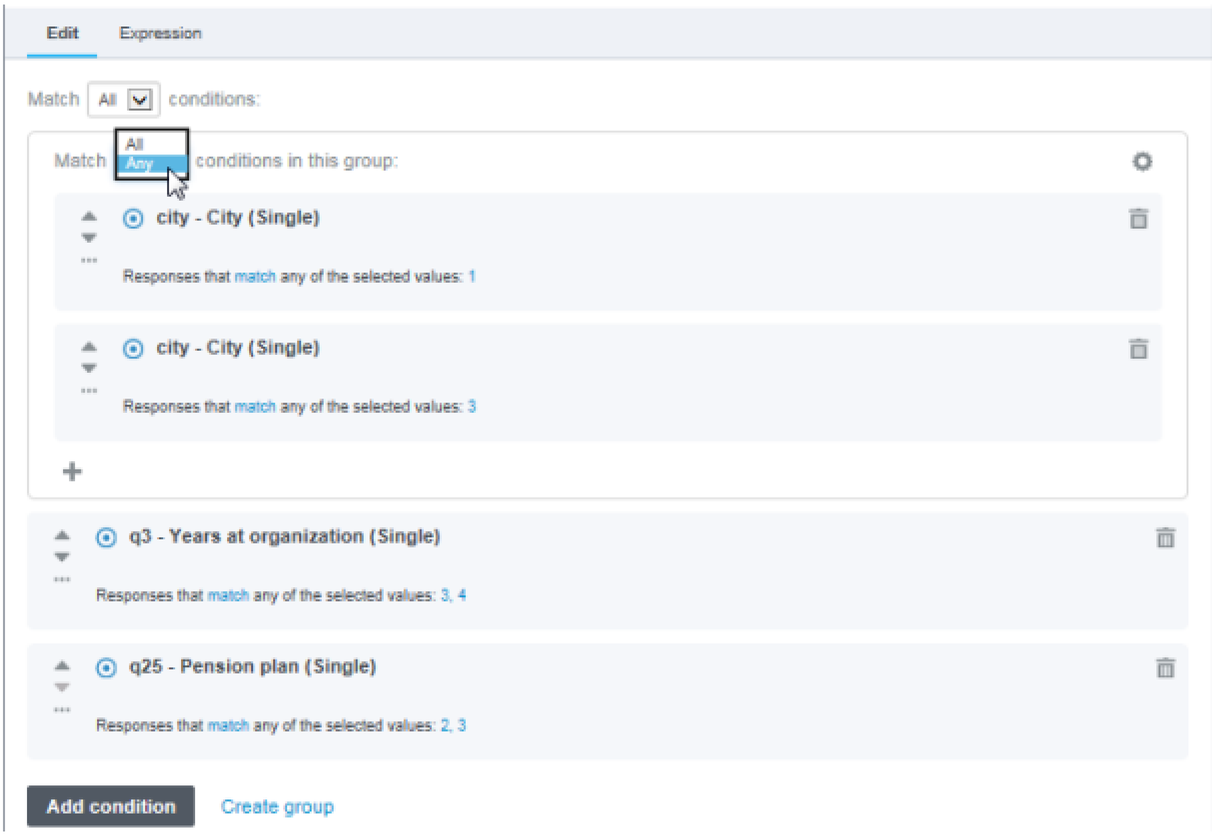


Figure 122 The city categories are grouped and Any is selected

The grouped condition is complete. Now the information page will be displayed to those employees who have worked at either office 1 or office 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.

4.13. Scripting in Questions

All question object 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. Once here, the fields available will depend on the question type.

4.13.1. 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 (go to Loops 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.

4.13.2. 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.

4.13.3. 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 91 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.

4.13.4. 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.

4.13.5. 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).

4.14. 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.

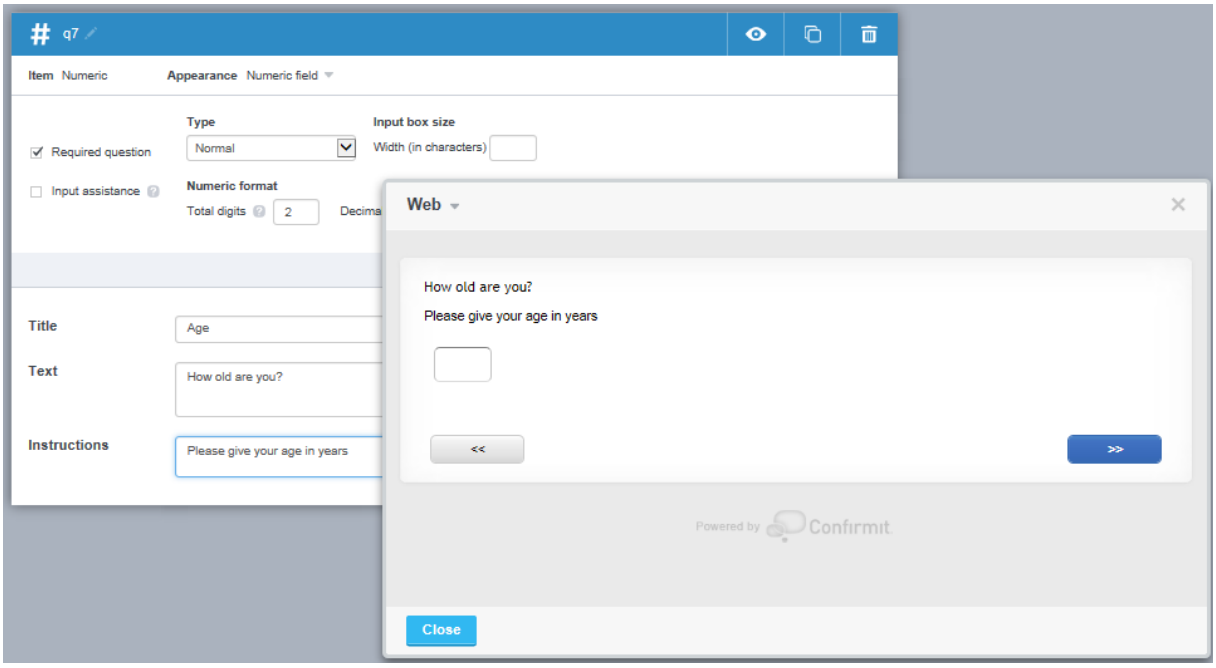


Figure 123 Example of the preview page in Web rendering

In the upper left corner of the preview page is a drop-down menu where you can choose how you want the preview to be rendered. You can select between Web, Smartphone and Generic mobile.

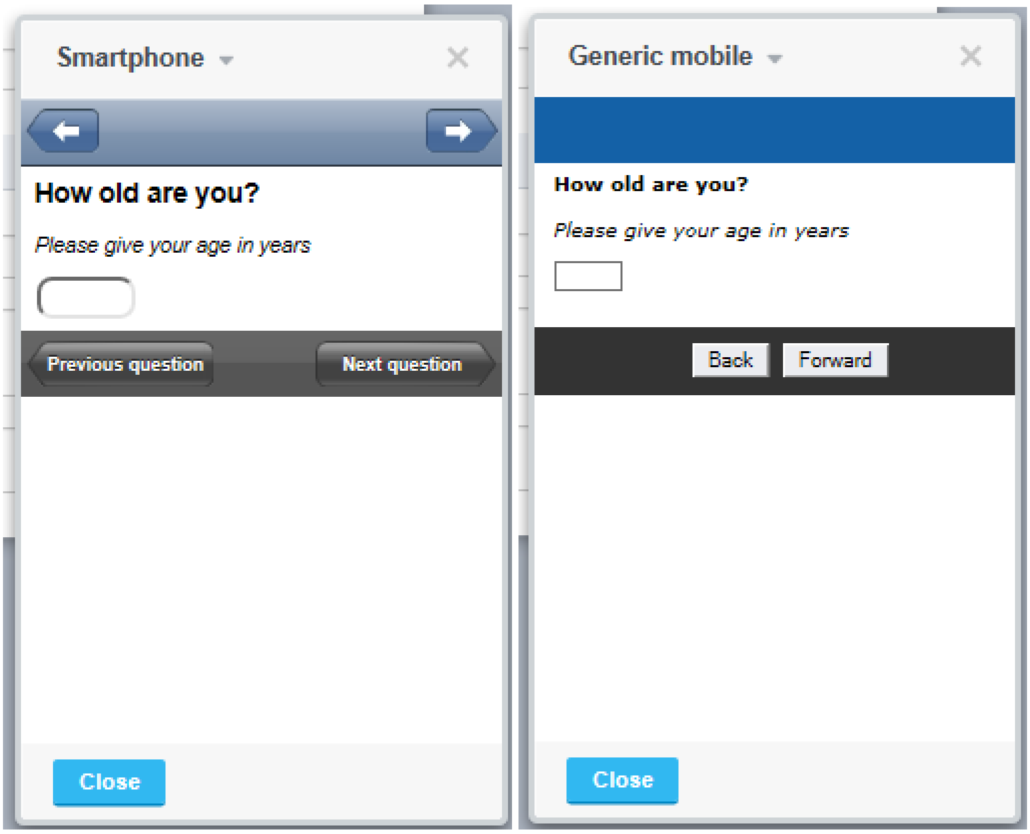


Figure 124 Examples of the preview page for Smartphone and Generic mobile

The preview page opens by default at Web rendering. If you change this then your selected rendering is remembered the next time you open the preview page for that survey.

4.15. Scratchpad

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

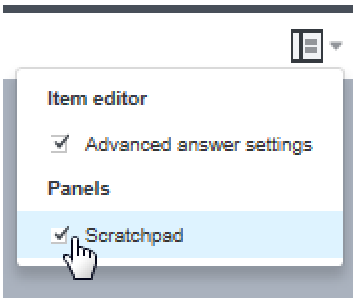


Figure 125 Activating the scratchpad

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.

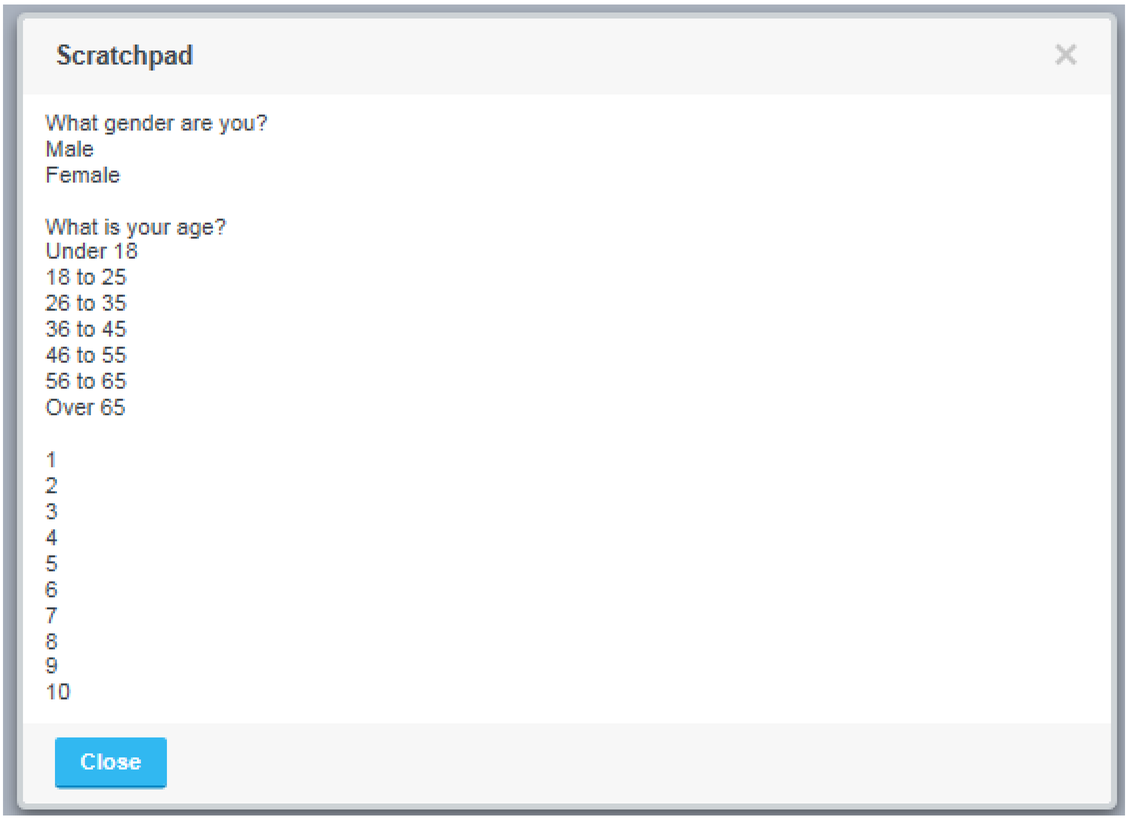


Figure 126 The scratchpad in use

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.

4.16. 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 61 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” objects.
- 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.

5. 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** menu you start the test at the beginning of the survey, but once started you can jump to any question by clicking on the desired question or node in the Survey column.

To start a test of the entire survey, in the upper-right corner of the Designer page click **Test survey**. A menu of options appears.

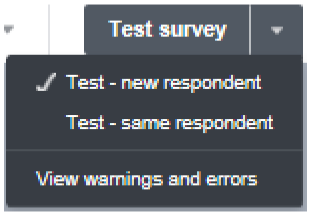


Figure 127 The Test Survey options

- **Test - new respondent -** this clears any answers you may already have added to the survey 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 option means any answers you have already added to the survey are kept. 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. 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.

If you wish to test a particular question, in the Survey column move the pointer over the desired item and click its cog-wheel icon. The cog-wheel menu opens.

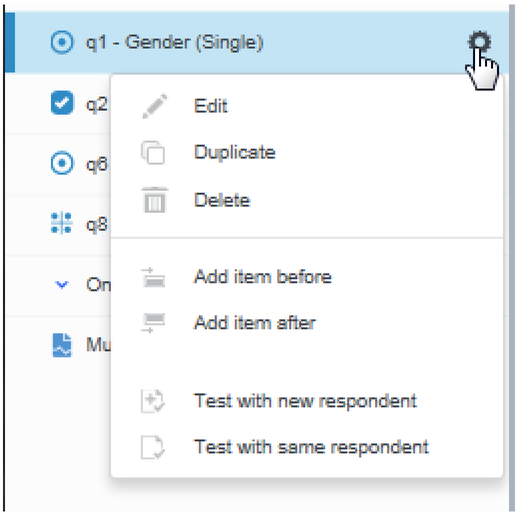


Figure 128 A survey item's cog-wheel menu

The **Test with new respondent** and **Test with same respondent** open the test functionality at the selected question.

When you select **Test - new respondent** or **Test - same respondent**, the survey loads and opens in the main area of the screen as the respondent would see it. Note that the survey column changes color to indicate you are in Test mode.

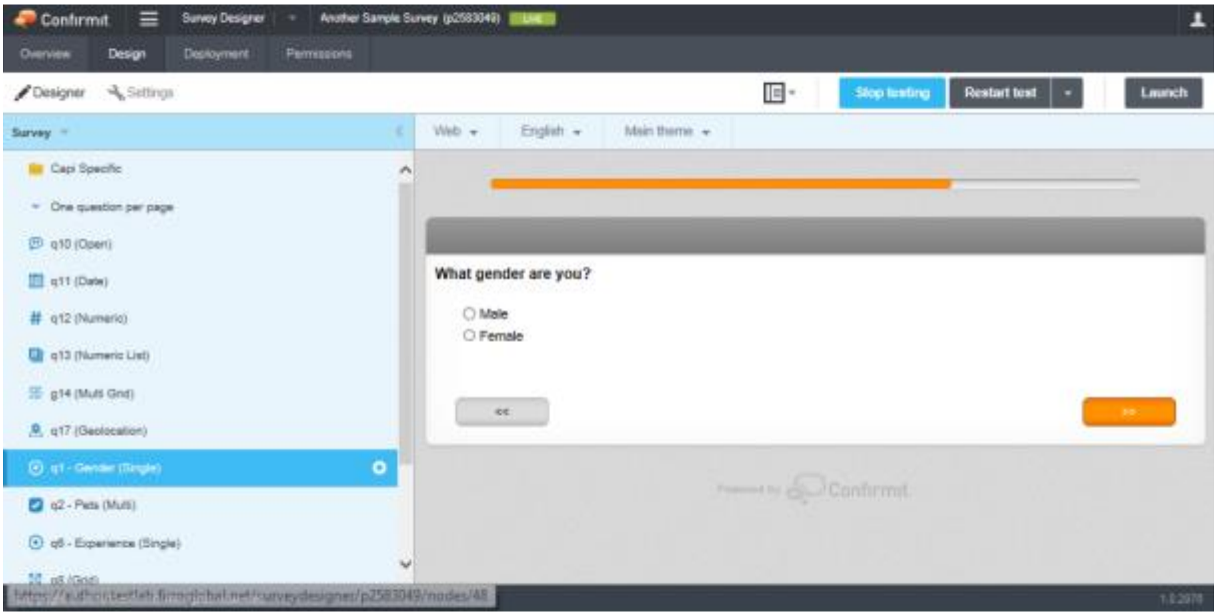


Figure 129 Testing the survey

In the event you have selected more than one rendering mode in the **Overview > Settings** area (see The Settings Area on page 15 for more information), then you can select the display mode for the survey test. You can then see how the survey will look to respondents using the various modes. To change the mode, in the upper-left corner of the Test area click the mode button (in this example Web) to open the drop-down menu, then select the desired mode.

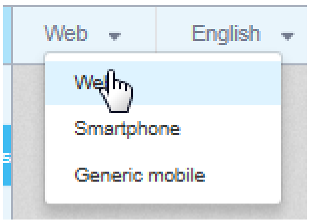


Figure 130 Selecting the rendering mode for the test

If your survey is multilingual (see The Languages Area on page 25 for more information), then you can select which language you run the test in. To change the language, in the upper-left corner of the Test area click the language button (in this example English) to open a drop-down menu of the languages available, then select the desired language.

You can view your survey with or without the question titles being presented in the question header. To toggle the headers, in the upper-left corner of the Test area click the Main Theme... button to open a drop-down menu then select the desired option.

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.

6. Launching the Survey

When you have finished constructing your survey and you want to test it, you must first prepare a response 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, on completion you must then update the database by re-launching.

Initially, before the survey is launched, the status (in the top bar) indicates Design; once it has been launched the first time 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 110 for more information).

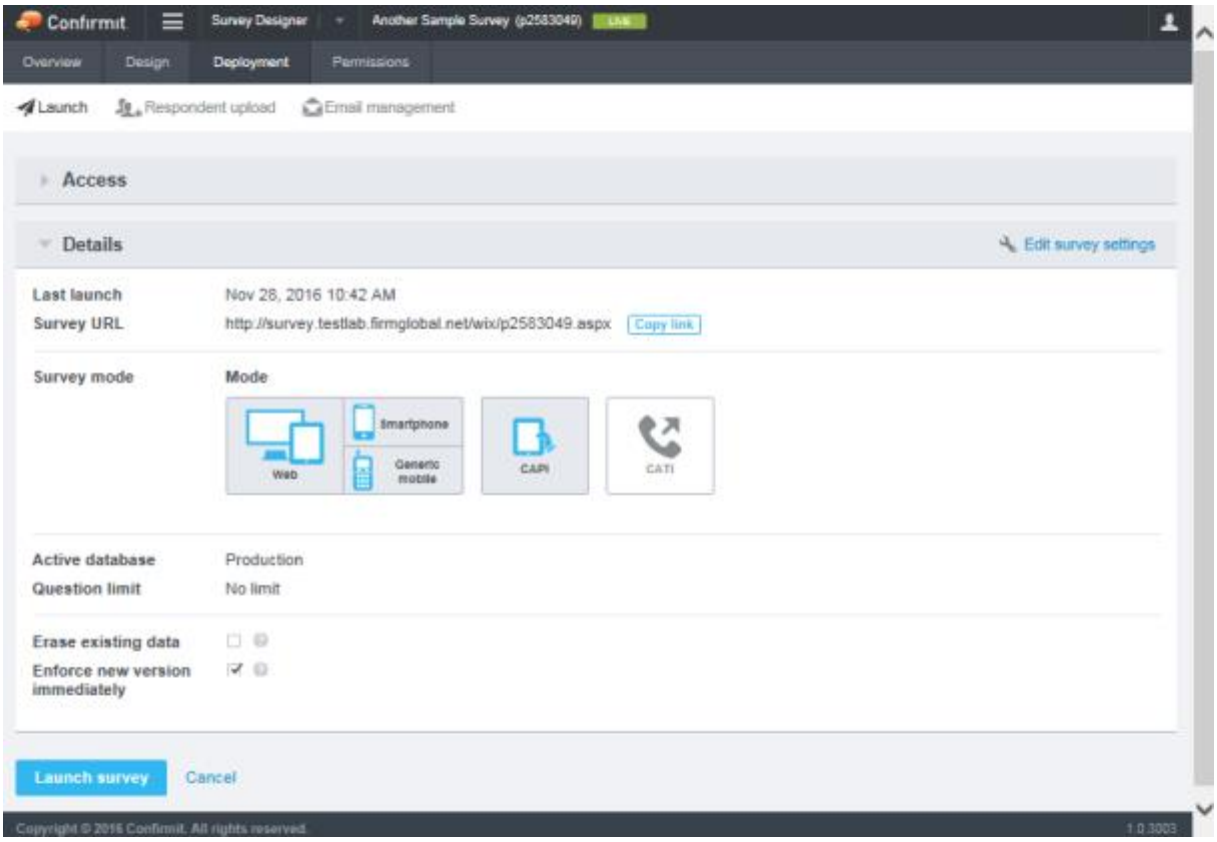


Figure 131 The Launch page for a survey

   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**.
3. While the survey is launching, information is provided to keep you informed of progress.

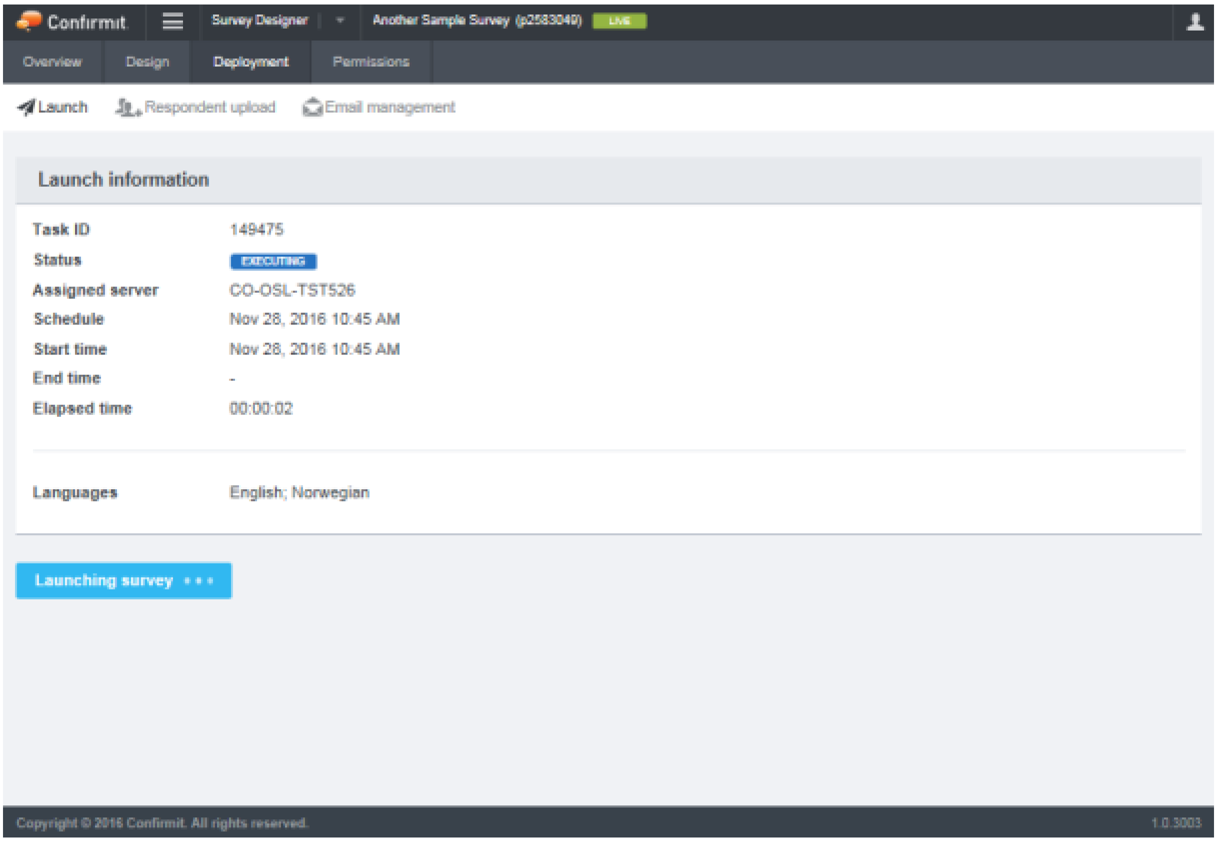


Figure 132 Launching

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.

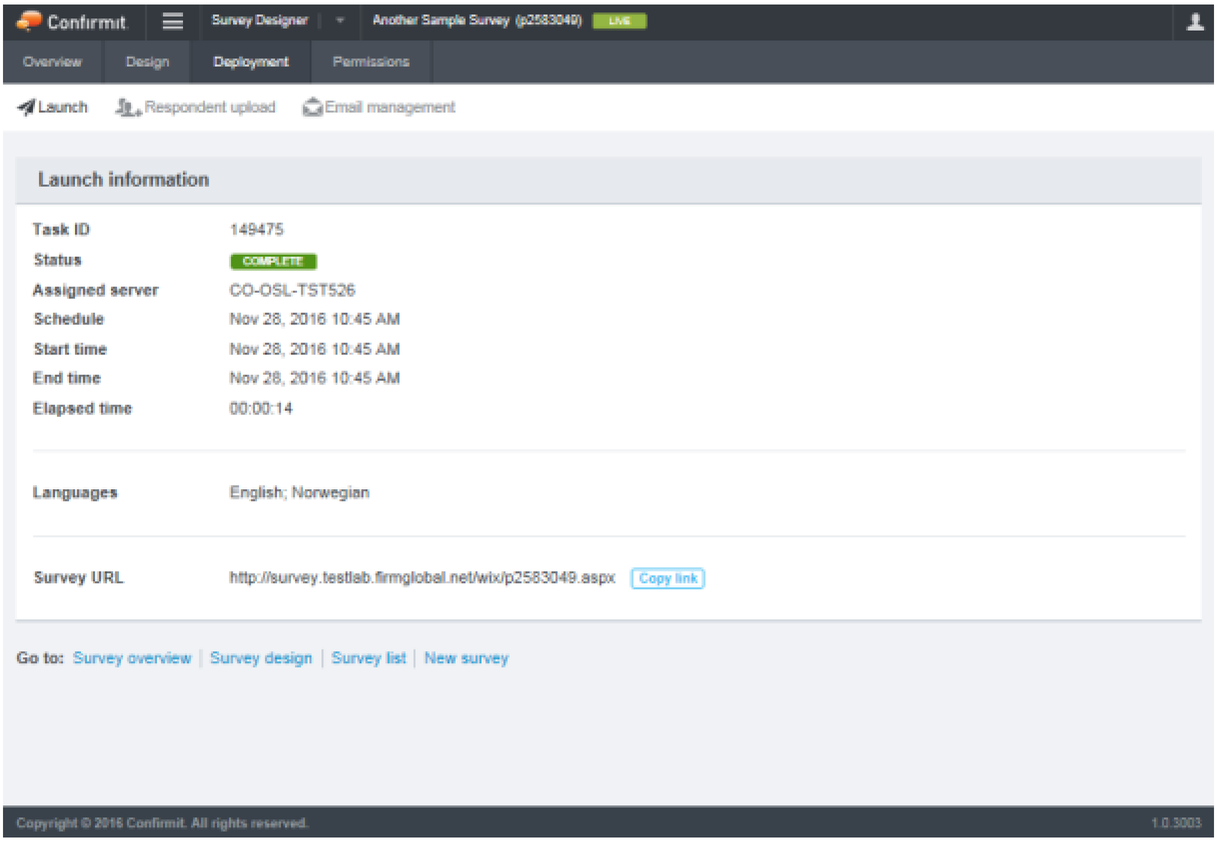


Figure 133 The Launch page on completion

To view the survey as a respondent will see it, click **Copy link**. This selects the survey URL and you can now copy it (for example press the **Ctrl+C** keys on your keyboard) to your clipboard. You can now open a new window in your browser and paste the URL into the address field to run the survey.

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 towards the top of the Deployment page.

Links below the URL allow you to move directly from this page to other areas of the application if desired.

6.1. 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.

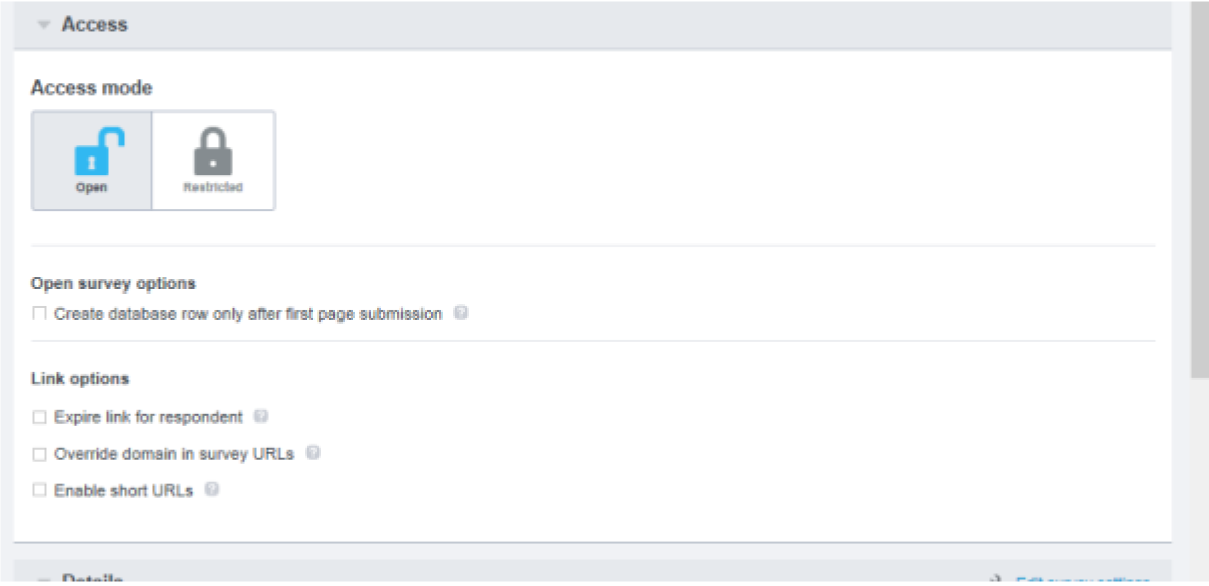


Figure 134 The Access area and options for Open surveys

The options available for open surveys are as follows:

- **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.

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.

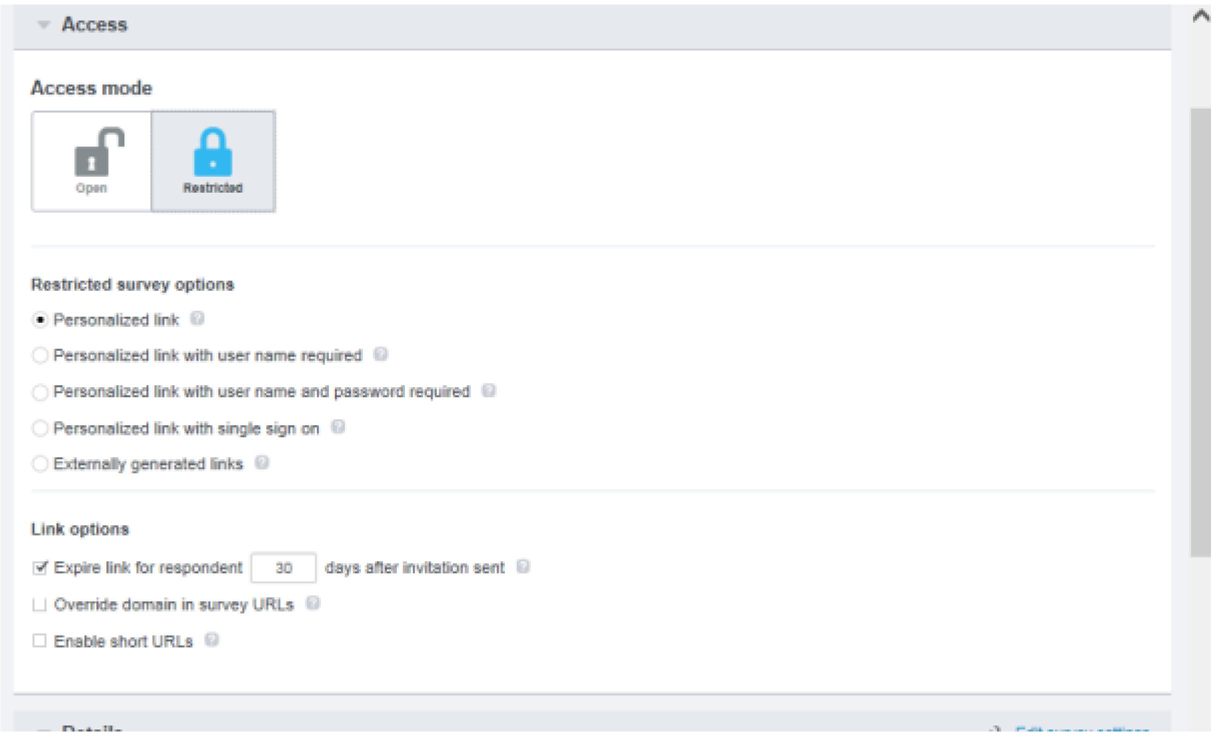


Figure 135 The Access area and options for Restricted surveys

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.

6.2. The Details Area

This area provides general information about the launch; if it has been launched before, when it was last launched and the URL, and allows you to set the survey modes to be used.

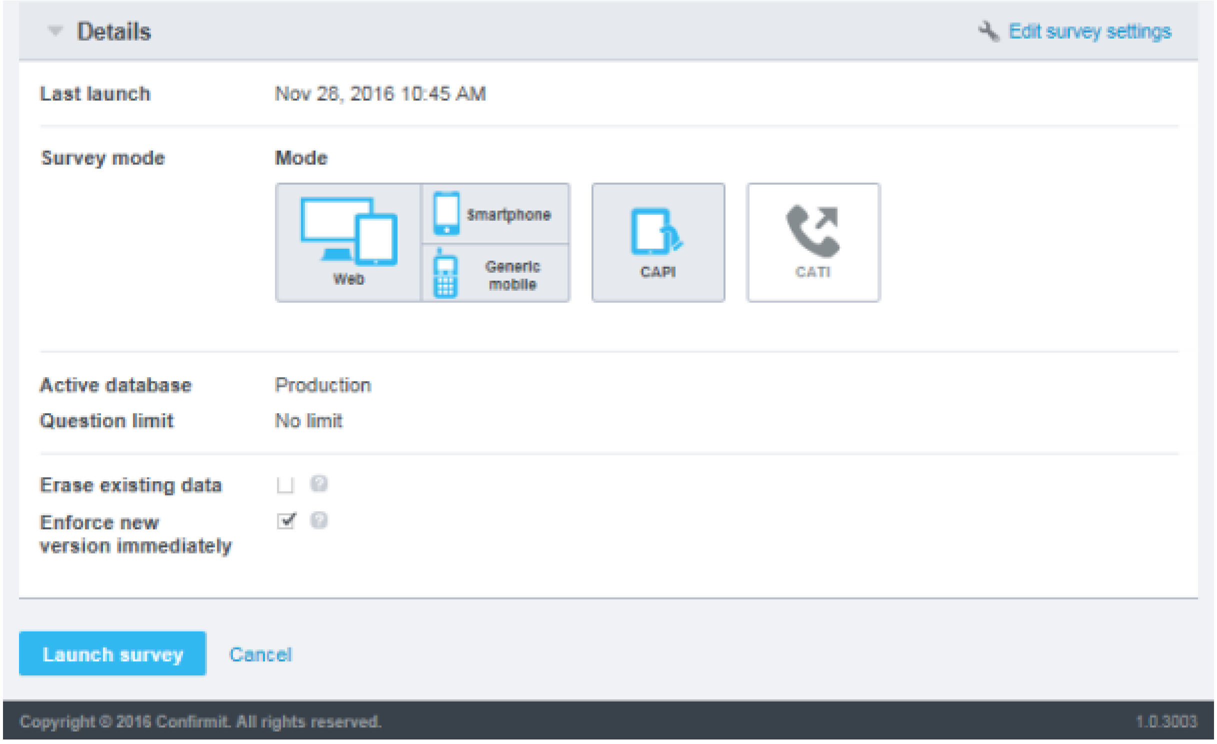


Figure 136 The Details area

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 109 for more information).

6.2.1. 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.

6.3. 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 111 for more information).

To upload a respondent list:

1. In the Deployment Page, go to the Respondent Upload tab.

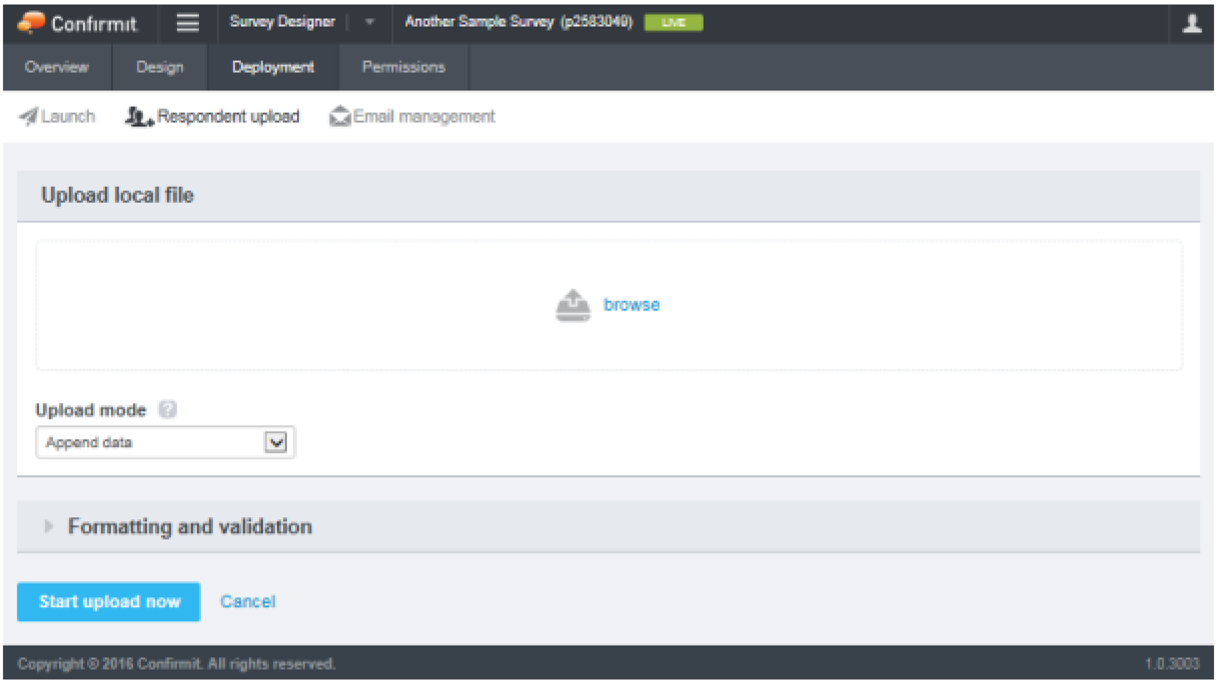


Figure 137 The Respondent Upload tab

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 112 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.

6.3.1. 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 111 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.

6.3.2. 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 135 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 <u>as early in the survey as possible</u>, preferably right at the beginning.

Special care must be taken when creating surveys that include a Start Block (see The Block Node on page 50 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.

6.3.3. Formatting and Validation

In the Respondent Upload tab, click **Formatting and Validation** to access a number of properties that you can select for the upload file.

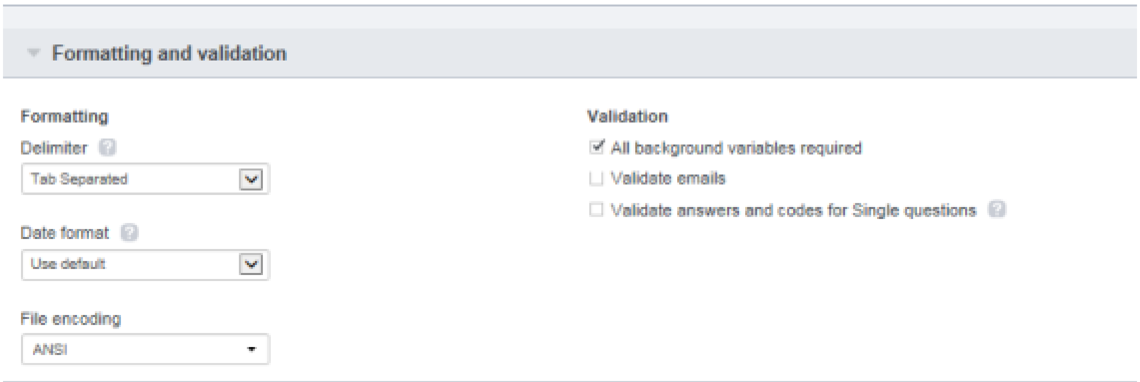


Figure 138 The Formatting and Validation properties

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. Note that comma-separated fields must be in quotes (“..”).
  - **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.
- **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.

6.4. 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.

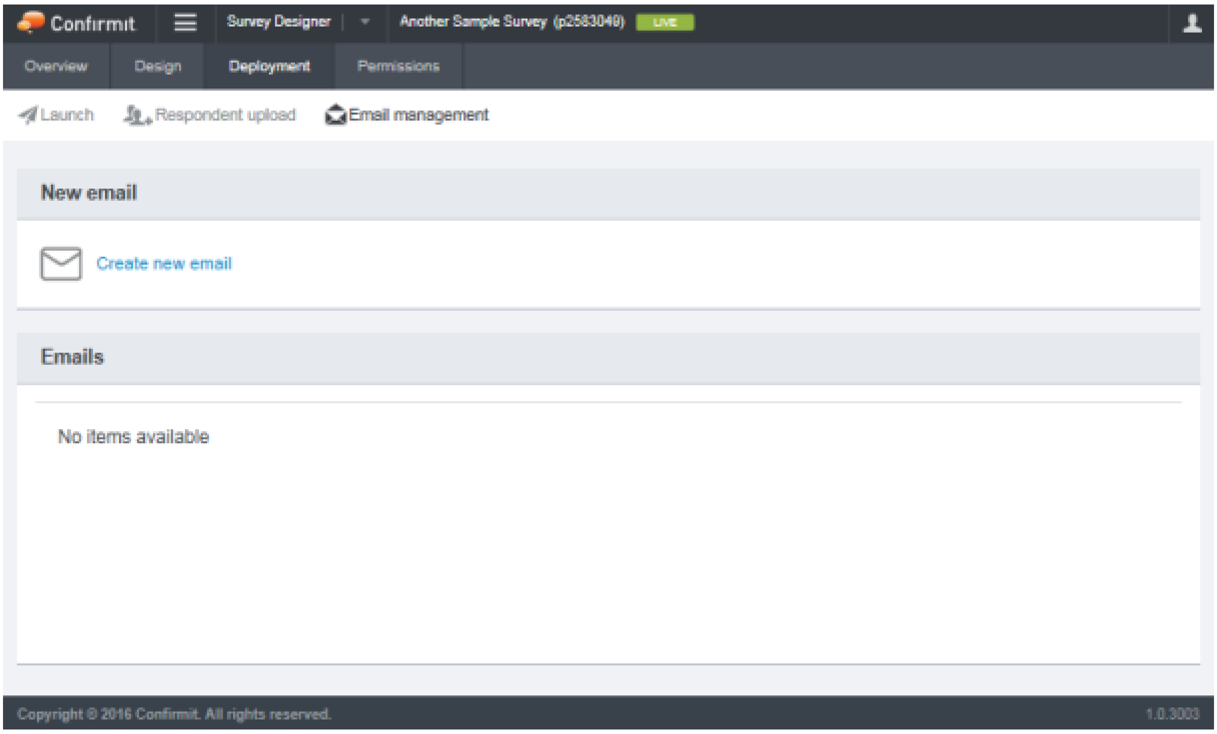


Figure 139 The Email Management page

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.

6.4.1. 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.

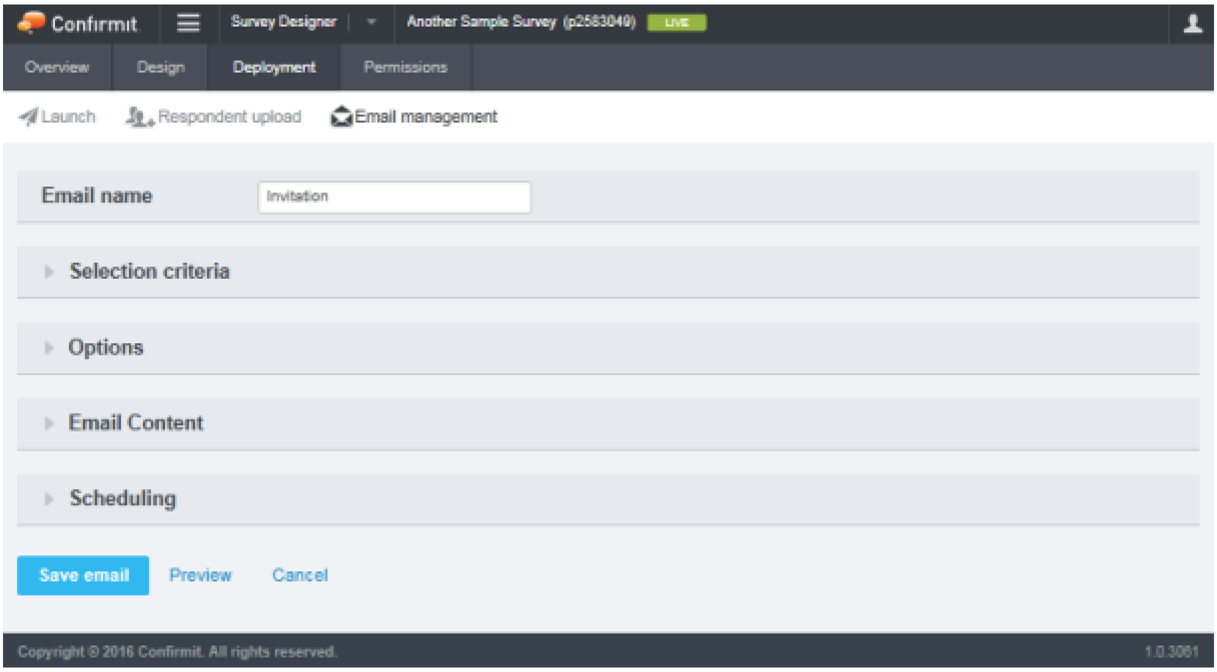


Figure 140 The Email Edit page

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 120 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.

6.4.1.1. The Selection Criteria Tab

The Selection criteria tab holds the settings that allow you to select the respondents who are to receive the email.

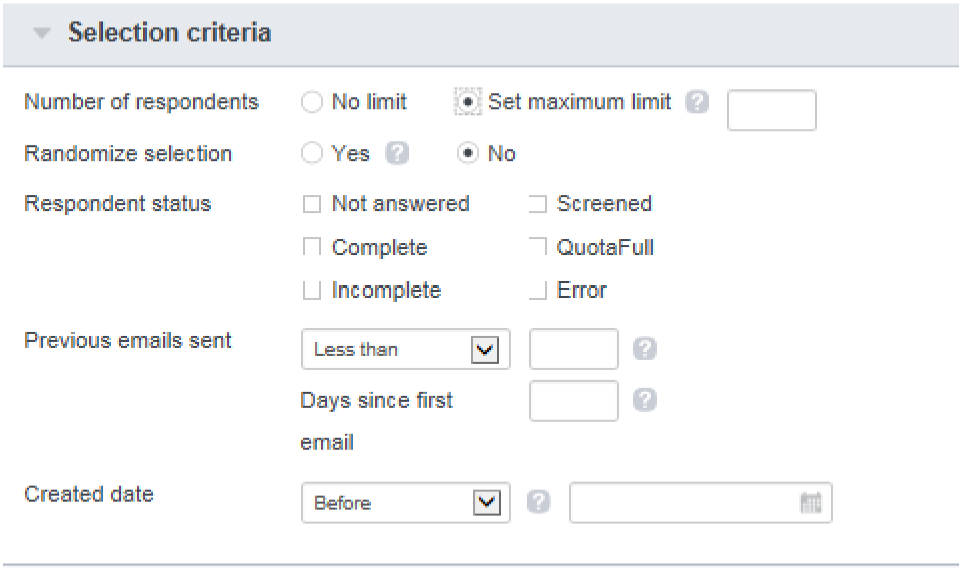


Figure 141 The Selection criteria tab

- **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 56 for more information).
  - **Quota full** – all respondents who have been stopped due to a full quota (see The Stop Node on page 56 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.

6.4.1.2. 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.

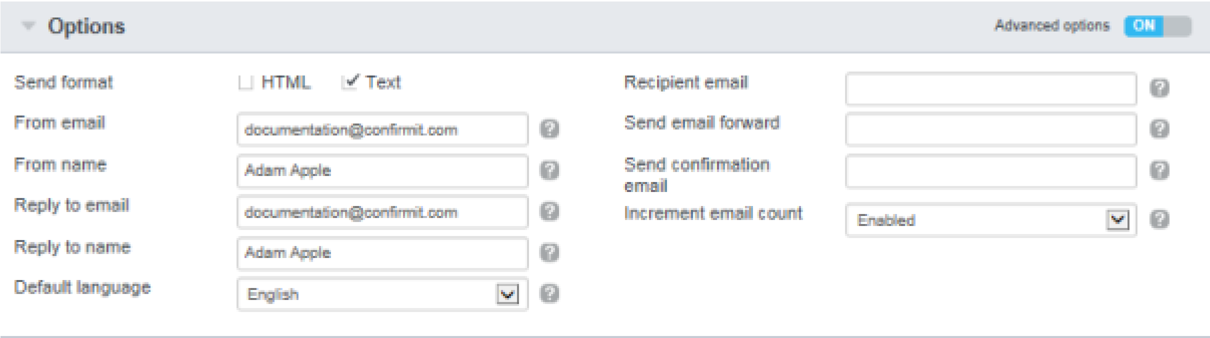


Figure 142 The Options tab

- **Send format –** the email will be sent as HTML code anyway. In this mode only mail clients that support HTML will be able to read the email, though this includes most. Check the box to also send the email as plain text; all other mail clients will then also be able to read it.
- **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 120 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.
- **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”.
- **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.
- **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 115 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.

6.4.1.3. The Email Content Tab

Here is where you add the text that you wish to send to your respondents. You can type, or copy and paste from another application.

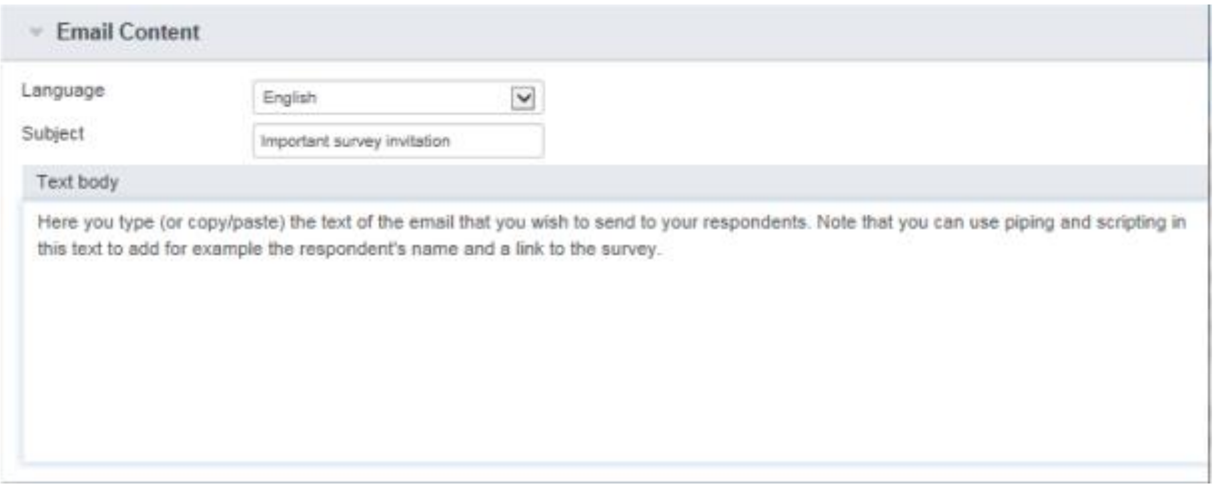


Figure 143 The Email Content tab

When you have selected HTML as a Send format (see The Options Tab on page 116 for more information) 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 63 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 119 for more information).

6.4.1.4. The Scheduling Tab

Here you specify when the email is to be sent.

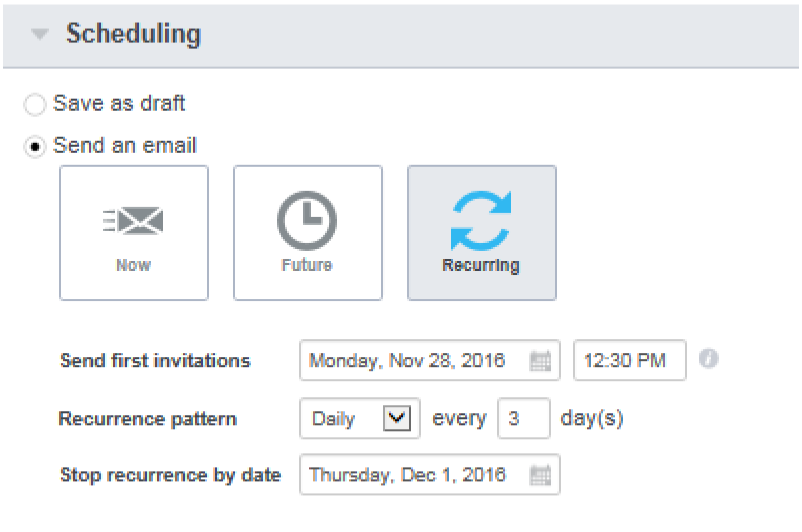


Figure 144 The Scheduling tab

- **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 115 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.

6.4.1.5. 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 25 for more information), and the send format(s) you have selected (see The Options Tab on page 116 for more information).

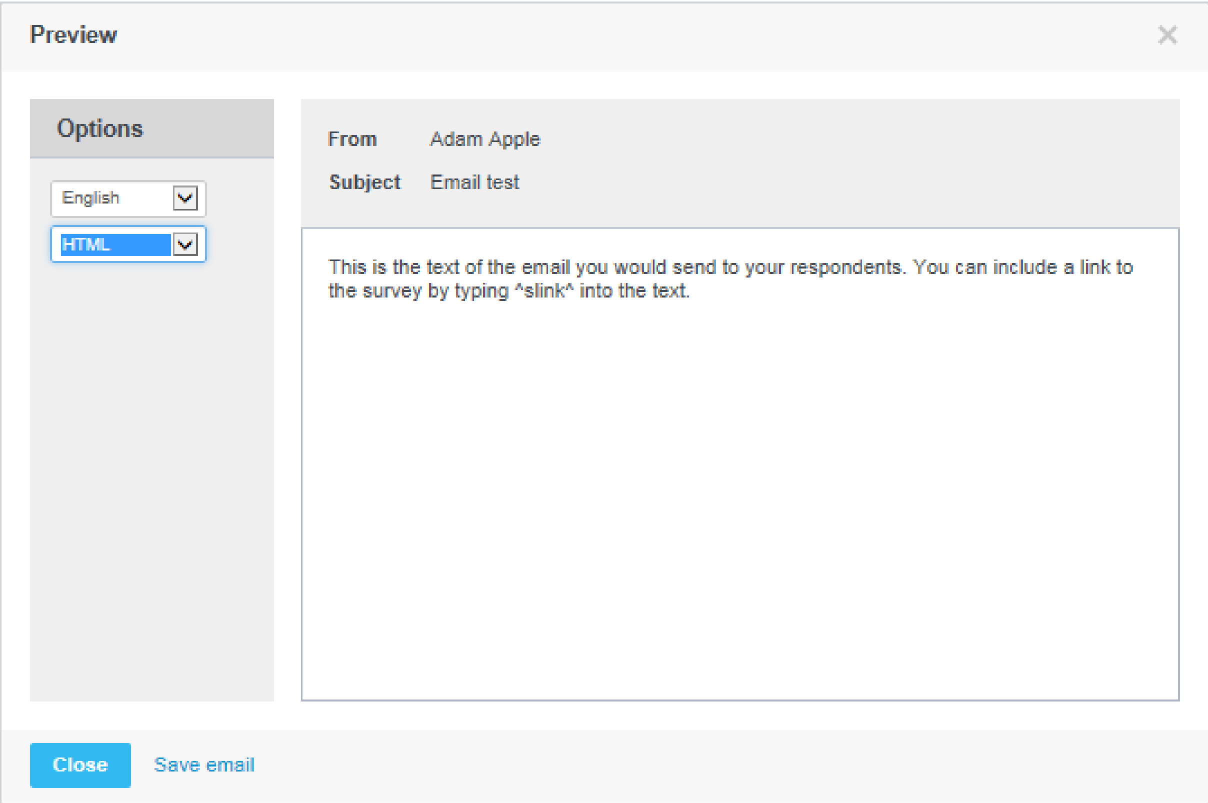


Figure 145 Example of the email preview overlay

Click **Close** to return to the Email management page.

6.4.2. 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.

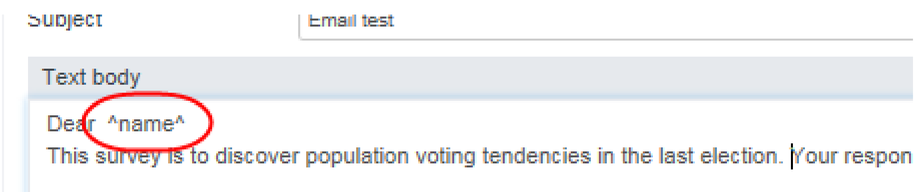


Figure 146 Substituting text in an email

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.

6.5. 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.

6.5.1. 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.

6.5.2. 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.

7. 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.

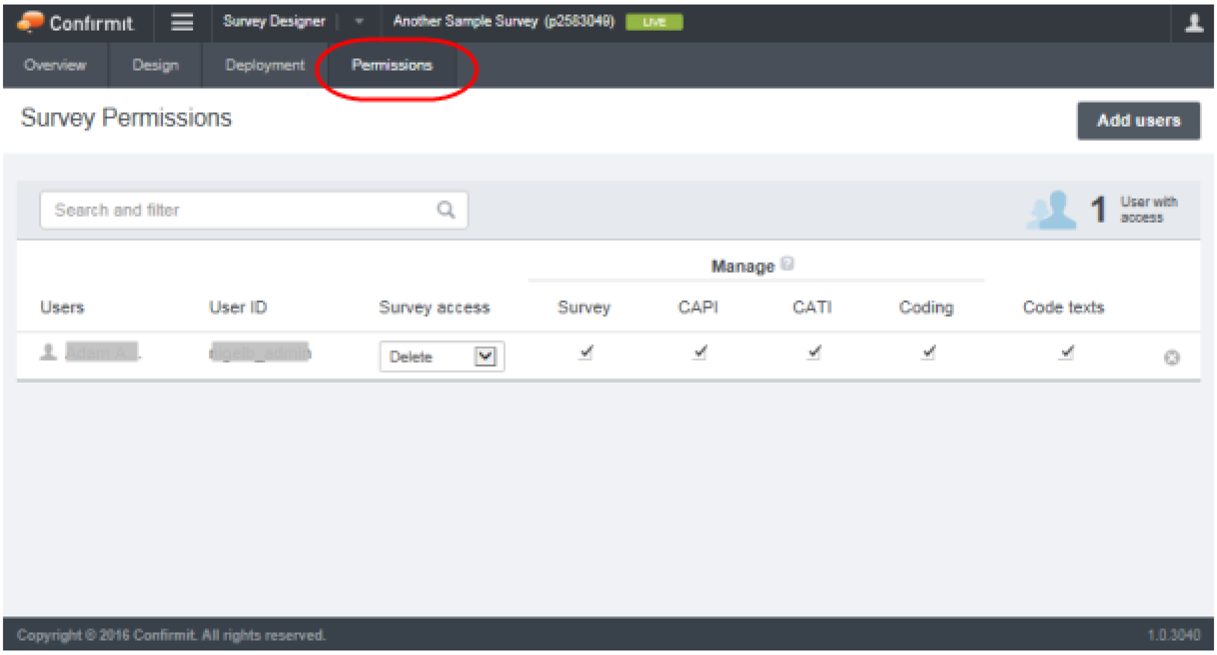


Figure 147 Example of the Permissions page for a new survey

2. Click **Add users**.

   The Add users overlay opens. This overlay lists all Confirmit users in your organization.

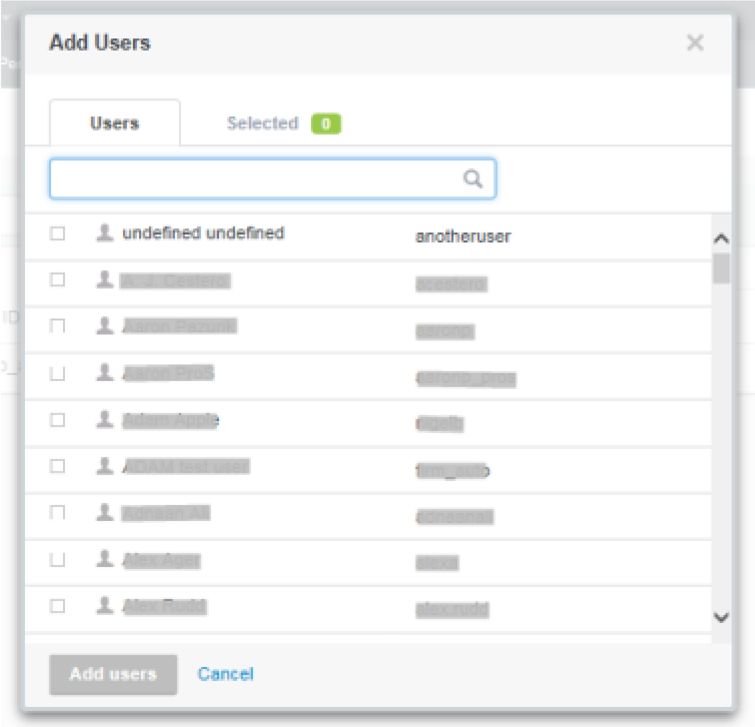


Figure 148 The Add users overlay

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.

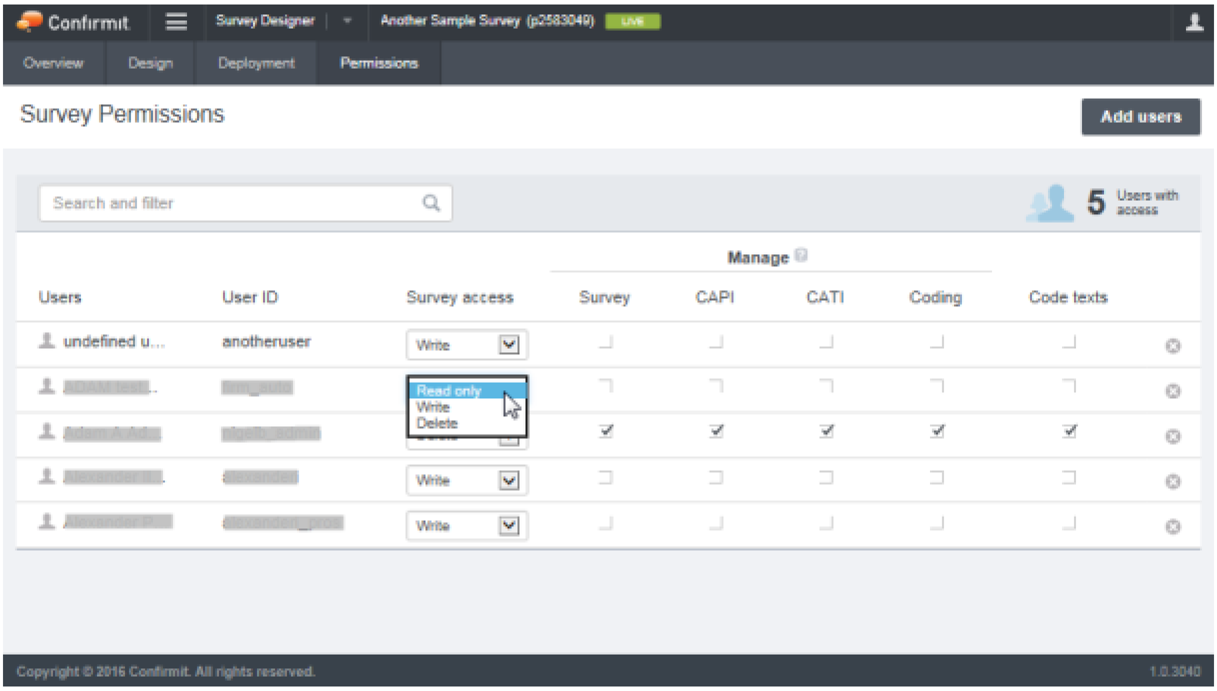


Figure 149 The Survey Permissions page with additional users

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:
  - **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.
  - **Write -** the user has Write permission, i.e. he/she is allowed to add questions to the questionnaire and reports.
  - **Delete -** the user has Delete permission, i.e. he/she is allowed to work on the questionnaire and reports, and is allowed to delete objects in them.
- **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.

8. 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.

9. 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 25 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
7169	Arabic	Tunisia	ar_tu

Language code	Language	Sub-name	Combident
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
518	Croatian		hr
5	Czech		cs
6	Danish		da

Language code	Language	Sub-name	Combident
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_ca
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
41	Farsi		fa
11	Finnish		fi
12	French		fr
2060	French	Belgium	fr_be
3084	French	Canada	fr_ca

Language code	Language	Sub-name	Combident
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
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

Language code	Language	Sub-name	Combident
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
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

Language code	Language	Sub-name	Combident
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
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

Language code	Language	Sub-name	Combident
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
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

Language code	Language	Sub-name	Combident
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.

10. 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 (a question ID must not start with _).

A

abstract

action

aggregated

all

and

any

avg

between

boolean

break

by

byte

C

callback

case

catch

CatiExtendedStatus

__channels__

char

class

combined_sourceid

comment

con

conn

const

contains

continue

convert

count

createddate

date

datebetween

debugger

default

delete

DialType

do

double

else

enum

env

eq

extends

false

FilterStatus

FilterStatusDate

FilteredBySurveyId

final

finally

FirstEmailedDate

float

floor

for

function

ge

goto

group

gt

if

implements

import

in

instanceof

int

interface

interview_end

interview_end_time

interview_start

interview_start_time

interviewer

interviewerid

in_use

isfalse

istrue

iterationid

its

l (except for use under special conditions

L (except for use under special conditions

lastchannel

lastcomplete

lastdevicetype

lastrenderingmode

last_handled

last_touched

le

long

loopstate

lt

native

ne

never_again

new

none

noofemailssent

not

not_in_quota

notin

null

or

order

package

page

panelid

PanelistCreatedDate

panelistid

PanelistModifiedDate

private

projectid

protected

public

PValDate

PValInHier

PValNum

PValStr

PValStrArr

question

R

recoding

respid

responseid

return

rid

right

rolling

round

rowguide

S

sample_category

select

short

smtpstatus

source_projectid

source_responseid

state

static

status

string

super

switch

synchronized

this

throw

throws

to

todate

transient

tries

true

try

typeof

unique_sourceid

var

void

volatile

while

with

The following can only be used in respondent lists:

userid

password

language

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:

CON

PRN

AUX

NUL

COM1

COM2

COM3

COM4

COM5

COM6

COM7

COM8

COM9

LPT1

LPT2

LPT3

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.

11. Appendix D - 3rd Party Software Components used in Survey Designer

Introduction

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