



Confirmit Data Processing User Guide

This is document revision 5 of the Confirmit Horizons v23 Data Processing User Guide, published in August 2018. The information herein describes Confirmit Horizons Data Processing and its features as of Confirmit Horizons Build nr. 23.0.742 (given in the **Home > Help > About** box). New features may be introduced into the product after this revision and build. Go to www.confirmit.com or check “News” on the Customer Extranet for the latest updates.

Copyright © 2018 by Confirmit. All Rights Reserved.

This document is intended only for registered Confirmit clients. No part of the contents of this document may be reproduced or transmitted in any form or by any means without the written permission of Confirmit.

Confirmit makes no representations or warranties regarding the contents of this manual, and specifically disclaims any implied warranties of merchantability or fitness for any particular purpose. The information in this manual is subject to change without notice.

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

Table of Contents

Table of Contents	3
What's New in this Revision?	7
1. The Data Processing Module.....	1
1.1. Introduction	1
1.2. What is Triple-S?	2
1.3. The Triple-S Versions	2
1.4. Template Types.....	3
1.4.1. The Simple Template.....	3
1.4.2. The Fixed Width Template.....	3
1.4.3. The Quantum Template.....	4
2. The Data Processing Menu.....	5
2.1. The Template List.....	5
2.1.1. How to Create a New Template.....	6
2.1.2. Creating a Default Template	11
2.1.3. How to Import a Template	13
2.1.4. How to Export a Template	13
2.1.5. How to Replace a Template	14
2.1.6. How to Duplicate a Template.....	15
2.1.7. How to Link a Template to a Different Project	15
2.1.8. Template Permissions	15
2.1.9. How to Include Multiple Languages in a Template	16
2.1.10. The Template Editor	17
2.1.10.1. Variable Types.....	19
2.1.10.2. Variable Properties	20
2.1.10.3. How to Navigate through Variables in the Template	27
2.1.10.4. How to Back Up a Template	29
2.1.10.5. How to Add Variables to the Template	29
2.1.10.6. How to Import Variables into the Template	30
2.1.10.7. How to Fix the Positions of Variables	33
2.1.10.8. Changing a Multi Variable.....	34
2.1.10.9. How to Duplicate Variables.....	35
2.1.10.10. How to Assign new Range Values to a Variable	35
2.1.10.11. How to Move Variables within the Template	36
2.1.10.12. How to Delete Variables from the Template	37
2.1.10.13. Reallocating Variables	37
2.1.10.14. How to Show and Hide List Columns.....	38
2.1.10.15. How to Flatten a Template.....	38
2.1.10.16. How to Update the Template from the Project.....	39
2.1.11. Mapping Confirmit Variables.....	40
2.2. Current Rule	40
2.2.1. The General Tab.....	41
2.2.1.1. How to Duplicate a Rule	42
2.2.1.2. How to Execute a Rule	42
2.2.1.3. Validating an Action Script.....	43
2.2.1.4. How to Export a Rule	43

2.2.1.5. Executing Rules as Other User.....	43
2.2.2. The Source Tab.....	44
2.2.2.1. Source Type > Delimited Text File.....	44
2.2.2.2. Source Type > Excel File.....	46
2.2.2.3. Source Type > Respondent Data.....	47
2.2.2.4. Source Type > Survey Database.....	49
2.2.2.4.1. The Relative Date Filter	52
2.2.2.5. Source Type > Triple-S Data	53
2.2.3. The Action Tab	53
2.2.4. The Target Tab.....	55
2.2.4.1. Target Type > Delimited Text File or Delimited Text File (Answer Codes as Labels) 55	
2.2.4.2. Target Type > Excel File or Excel File (Answer Codes as Labels)	57
2.2.4.3. Target Type > Fixed Width File.....	59
2.2.4.4. Target Type > Quantum / SAS	60
2.2.4.5. Target Type > Respondent Data	61
2.2.4.6. Target Type > SPSS.....	63
2.2.4.7. Target Type > SPSS (SAV)	64
2.2.4.8. Target Type > Survey Database	66
2.2.4.9. Target Type > Triple-S XML (Standard or Extended)	70
2.2.4.10. Mapping Fields	70
2.2.5. The Permissions Tab.....	72
2.2.6. Example of Transferring Data.....	72
2.3. Current Rule Set.....	78
2.3.1. The General Tab.....	79
2.3.2. The Rule Management Tab	80
2.3.2.1. How to Add a Rule to the Rule Set	81
2.3.3. The Report Tab.....	82
2.3.4. The Permissions Tab.....	83
2.4. Rule List.....	84
2.4.1. How to Create a New Rule	85
2.4.2. How to Import a Rule	85
2.5. Rule Set List	86
2.5.1. How to Create a New Rule Set.....	86
2.6. Data Central Project List.....	87
2.6.1. Data Central - General Description.....	87
2.6.2. The Data Central Project Details Page	88
2.6.3. The Details Tab	88
2.6.4. The Permissions Tab.....	89
2.6.5. How to Create a New Data Central Rule	90
2.6.6. How to Export a Data Central Project.....	91
2.6.7. How to Import a Data Central Project	91
2.6.8. The Create New Data Central Rule Tabs	92
2.6.8.1. The General Tab.....	92
2.6.8.2. The Source Tab	94
2.6.8.2.1. The Properties when the Source is a Project.....	94
2.6.8.2.2. The Properties when the Source is a File	95
2.6.8.3. The Target Tab.....	96
2.6.8.3.1. The Target Tab when the Target is a Project.....	96

2.6.8.3.2. The Target Tab when the Target is a File	98
2.6.8.4. The Permissions Tab	99
2.7. The Expression Editor Window	100
3. Data Processing Scripting	102
3.1. Data Types	102
3.2. Available Functions	102
3.3. Working with Open Text Variables	105
3.4. Working with Open Text Numeric Variables	106
3.5. Working with Single Questions	107
3.6. Working with Multi Questions	108
3.7. Grids and 3D Grids	109
3.8. Working with interview_start and interview_end	109
3.9. Post Scripts	110
3.10. Validating and Executing the Script	110
3.11. Action Tab Script Examples	111
3.12. Questions and Answers	115
4. CRM Connector for Salesforce	116
4.1. Accessing CRM Connector for Salesforce	116
4.1.1. Enabling the Feature in Confirmit	116
4.1.2. Installing the Package to the Salesforce Environment (Horizons Version)	116
4.1.3. Installing the Package to the Salesforce Environment (AppExchange Version)	116
4.1.4. Accessing the Wizard (Horizons Version)	122
4.1.5. Accessing the Wizard (AppExchange Version)	123
4.1.6. Job List View	124
4.1.7. Logging In to Salesforce	126
4.2. Transferring Data from Salesforce to Confirmit	127
4.2.1. The Procedures	128
4.2.1.1. How to Set Up a New Data Transfer Job (Salesforce to Confirmit Respondent Table)	128
4.2.1.2. How to Modify an Existing Job Field Mapping (Salesforce to Confirmit Respondent Table)	135
4.3. Transferring Data from Confirmit to Salesforce	137
4.3.1. The Procedures	138
4.3.1.1. How to Set Up a New Data Transfer Job (Confirmit Survey Data to Salesforce)	138
4.3.1.2. How to Set Up a New Data Transfer Job (Confirmit Respondent to Salesforce)	147
4.3.1.3. How to Modify an Existing Job Field Mapping (Confirmit to Salesforce)	155
4.4. Managing CRM Connector Jobs	159
4.4.1. The Procedures	159
4.4.1.1. How to View the History of an Existing Job	159
4.4.1.2. How to Modify an Existing Job Schedule	162
4.4.1.3. How to Delete a Job	164
4.4.1.4. How to Change the Name of an Existing Job	165
4.5. Transferring Data from Salesforce to Confirmit (Flex Extension)	166
4.5.1. Accessing CRM Connector for Salesforce to Confirmit (Flex Extension)	167
4.5.2. The Procedures (Flex Extension)	168
4.5.2.1. How to Set Up a New Data Transfer Job (Salesforce to Confirmit Flex Extension)	168
4.5.2.2. How to View Data Transfer Jobs (Salesforce to Confirmit Flex Extension)	174
4.5.2.3. How to Modify an Existing Data Transfer Job (Salesforce to Confirmit Flex Extension)	176
4.5.2.4. How to Schedule a Recurring Job (Salesforce to Confirmit Flex Extension)	176
4.5.2.5. How to Delete a Job (Salesforce to Confirmit Flex Extension)	177

5. Technical Details	178
5.1. Survey Source	178
5.2. Survey Target	178
5.3. Validation Rules.....	179
5.4. The Bitstring Format	180
5.5. The Spread Format.....	181
5.6. Confirmit Tags	182
Appendix A: Introduced Extensions	183
Appendix B: List of Data Processing Examples	184
Index	185

What's New in this Revision?

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

The following changes have been made in this revision:

- The CRM Connector for Salesforce chapter and subsections are extensively updated to reflect changes in the application (see CRM Connector for Salesforce on page 116 for more information).

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

Important

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

1. The Data Processing Module

The Data Processing module provides processing functionality to improve data imports, data cleaning (recoding and transformation) and data exports. The module uses Rules, set up by the user, to direct the flow of information, and the system handles data much faster than "standard" import and export functionality. Note that the module functions are not associated with any particular project - you do not enter a project first - so you can work with multiple projects.

Important

The Template functionality is intended for importing and exporting data unrestricted by project ownership. The user permission for this functionality is therefore "company-wide"; i.e. all users attached to a company will have full read and editing access to all templates, rules and rule lists associated with that company. Be therefore extremely careful when editing templates and rules - if you change a rule that is being used by another user, valuable project data may be lost when that user runs the changed rule.

Note that if a user attempts to run a rule that is attached to a project to which the user does not have access, then the rule will abort with an error message.

Access the module functionality via the **Data Processing** menu command.

1.1. Introduction

The Data Processing module is built on the SQL Server Integration Services (SSIS) architecture. The module consists of:

- Data Sources.
- Action Script (Data cleaning / recoding / transformation).
- Data Targets (destinations).

The module uses the Triple-S Survey Data Interchange standard (see What is Triple-S? on page 2 for more information).

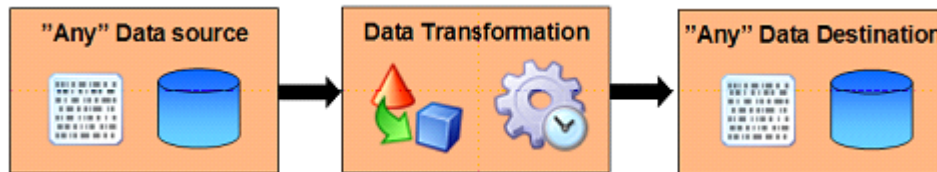


Figure 1 The basic data processing flow

Data Processing supports the following sources and targets:

Sources:

- Text File (comma, and tab delimited)
- Triple-S XML (version 1.1, 1.2, 2.0)
- Confirmit Survey (one or multiple surveys)
- Excel file

Targets (destinations)

- Text File (comma, and tab delimited)
- Triple-S XML (version 1.1, 1.2, 2.0)
- Confirmit Survey (one survey only)

- Excel file
- SPSS
- Quantum
- SAS
- Fixed width file

Action Script (data transformation)

- JScript.NET

The action script allows you to modify the values of the columns provided by the source. This means that the columns read by the source can be altered by the action script, and passed into the destination.

Note: The action script cannot introduce new columns into the database.

1.2. What is Triple-S?

Triple-S is a public Survey Data Interchange standard, designed and published by the Triple-S Group.

Triple-S is a language for describing survey metadata - that is, data about the survey data: the question and response texts, the location of individual data items within the record, valid ranges for responses, and so on. The Triple-S standard defines a means by which both survey data and variables may be transferred between different survey programs running on different software and hardware platforms. If one program can translate into Triple-S format, and another program can translate from Triple-S format, then the survey metadata can be translated from one language program to the other automatically, without the need for a programmer to do the job manually.

A Triple-S survey is described in two text files. One, the Metadata File, contains version and general information about the survey together with definitions of the survey variables. This is used to interpret the contents of the Data File. The Metadata File will normally have the file extension of 'xml' (or 'sss' for compatibility with previous versions of the standard) and the corresponding Data File will have the same name but with the extension 'asc'.

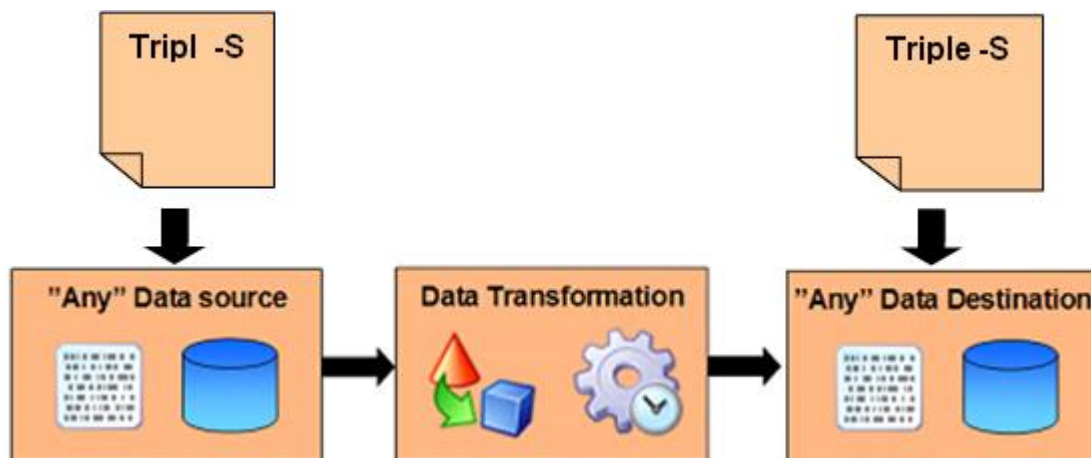


Figure 2 The processing flow

The Triple-S format is used consistently in Confirmit Data Processing to define templates (schemas) for sources and destinations.

For further detailed information about the Triple-S format, refer to the website www.triple-s.org.

1.3. The Triple-S Versions

The Triple-S XML standard currently has three versions as follows:

- Triple-S XML 1.1 - Hierarchies and comma-separated variable files are not supported.
- Triple-S XML 1.2 - Hierarchies and comma-separated variable files are not supported.
- Triple-S XML 2.0 - Supports comma-separated variables (CSV). Supports hierarchy for loops (separate files). Note that for projects with loops, hierarchy is supported for both import and export.

For further details on the formats and functionality available in the three versions, go to the Triple-S website at www.triple-s.org.

1.4. Template Types

Three types of template are available:

- Simple Delimited (see The Simple Template on page 3 for more information).
- Fixed Width (see The Fixed Width Template on page 3 for more information).
- Quantum (see The Quantum Template on page 4 for more information).

These are described in the following sections.

1.4.1. The Simple Template

A Simple (delimited) template allows you to specify which variable(s) should be included or excluded and in which order. This template can be created based on variables from one or several projects. A Simple template does not allow you to control the specific column positions of the variables, only the order in which they are to be exported.

The template schema editing functions include:

- Adding variables to the Template.
- Editing variables.
- Duplicating variables.
- Moving variables within the Template.
- Deleting variables from the Template.
- Importing variables from any project.

Simple templates are ideal for exports to Excel, Delimited Text File, Fixed Width file and SPSS formats.

1.4.2. The Fixed Width Template

A Fixed Width template allows you to specify which variable(s) should be included or excluded and in which order. This template can be created based on variables from one or several projects. In addition, the Fixed Width template allows column positions to be specified by assigning Start and Finishing columns or specifying the column Length. You will also have access to additional functions in the Template editor that allow you to change variable properties. For example: you can set Bitstring or Spread to one or a group of multi variables (see Changing a Multi Variable on page 34 for more information), and you can change the length of columns for one or a group of variables (for multi/single/quantity/character only).

The template schema editing functions include:

- Adding variables to the Template.
- Editing variables.
- Duplicating variables.
- Moving variables within the Template.
- Deleting variables from the Template.
- Importing variables from any project.
- Assigning Start and Finish columns.

- Assigning the length of the variable.
- Setting Spread or BitString.
- Fixing the column positions.
- Splitting multi functionality, which will generate logical variables from each category of a selected multiple variable.

This type of template is suitable for the following exports:

- Triple-S.
- SAS.
- SPSS.
- Fixed Width File.
- Quantum.

Note: If you use this template type for Quantum exports and the project contains loops, a Multi Trailer Card data set will be generated; otherwise it will be a Single Card data set. If you wish to generate a Single Card data set for projects with loops, you must first flatten the project.

1.4.3. The Quantum Template

The Quantum template allows you to specify which variable(s) should be included or excluded and in which order. This template can be created based on variables from one or several projects. In addition, a Quantum template will give you two additional columns in the editor. These represent the Start and Finish Card. These are editable.

The Quantum template schema editing functions include:

- Adding variables to the Template.
- Editing variables.
- Duplicating variables.
- Moving variables within the Template.
- Deleting variables from the Template.
- Importing variables from any project.
- Set Spread or BitString.
- Assign Start and Finish columns.
- Assign the length of the variable.
- Fix the column positions.
- Two columns are available that enable you to assign cards.
- Split multi functionality, which will generate logical variables from each category of a selected multiple variable.

If the project contains loops, a Multi Trailer data set will be generated; otherwise a Multi Card data set will be generated.

2. The Data Processing Menu

The Data Processing menu appears in the main menu bar. This has two methods of access:

- Click on the menu command to go to the orange sub-menu bar.
- Click on the down-arrow beside the command to open the drop-down menu, as shown below.

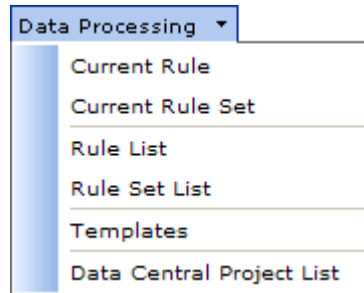


Figure 3 The Data Processing menu

2.1. The Template List

A Survey Data Template is a definition of meta-data connected to a data file. The template defines what data is included, where the data is, the type of questions, the question texts and the answer lists.

The Template List lists the templates currently available to you, which will depend on your access permission (see Template Permissions on page 15 for more information). When you select this menu command, the page opens as shown below.

Note: If when you enter Confirmit you go 'directly' to the Templates List, all templates to which you have access will be listed. If you have already selected a project and then go to the Templates List, only those templates used by that project will initially be listed. In this case, the Template Source selection box will be available, where you can select the option of viewing all templates.

Note: Templates are not locked to particular surveys, so all templates that you have access to can be listed. When importing or exporting, you must select an appropriate template that includes the questions you wish to work with.

ID	Type	Template Name	Company	Created By	Created	Project ID
634	Quantum	DocQuantum1	Confirmit	Apple, Adam	06.06.2011 11:24:52	p2456496 Change
633	Fixed Width	DocFixed1	Confirmit	Apple, Adam	06.06.2011 11:24:06	p2456496 Change
632	Delimited	DocSimple1	Confirmit	Apple, Adam	06.06.2011 11:22:47	p2456496 Change
630	Fixed Width	proj A template	Confirmit	ProS, Margarita	03.06.2011 21:35:49	p2456910 Change
628	Fixed Width	schm_imp	Confirmit	Tahir, Wasim	01.06.2011 16:14:15	Change
627	Fixed Width	schm	Confirmit	Tahir, Wasim	01.06.2011 14:50:24	Change
625	Delimited	Template 1	Confirmit	Tahir, Wasim	01.06.2011 13:28:26	p2444168 Change

Figure 4 Example of the Template List

On this page you can create new templates (see How to Create a New Template on page 6 for more information), import templates that have been created in other projects/servers (see How to Import a Template on page 13 for more information), edit the templates (see The Template Editor on page 17 for more information), export templates (see How to Export a Template on page 13 for more information) and change the project to which a template is linked (see How to Link a Template to a Different Project on page 15 for more information).

Move the mouse pointer over a Template Name link in the list to show a drop-down button - click on the button to open a drop-down menu. The items in this menu enable you to edit, duplicate, export or replace the selected template, and allocate to other users access permissions to the template (see Template Permissions on page 15 for more information).

2.1.1. How to Create a New Template

Note: You can start the Template Creation wizard from two places; "Survey Data > Templates" and "Data Processing > Templates". When you start the wizard from Survey Data a project is preselected, so the Project Schema Type selection step is unnecessary. The procedures for the two wizards are therefore slightly different. The procedure described below starts from Survey Data > Templates menu.

Note: When creating a new template you can save the settings as default. The next time you click New Template, the template will then be created with the default settings you have saved. To save a template as default, check the Save Current Options As Default box in the Advanced Options dialog. See below.

1. When in the Survey Data Template list, click **New Template**.

The template Name page opens as shown below.

Figure 5 The template Name page

2. Type a name for your new template into the Template Name field.
3. Select the type of template you wish to use.

The types are:

- o **Simple** - allows you to define a template specifying which variable(s) should be included or excluded and in which order. This template can be created based on variables from one or several projects. A simple template does not allow you to control the specific column positions of the variables, only the order in which they are to be exported. Simple templates are ideal for exports to Excel, Delimited Text File and SPSS formats, but could equally be used for Triple-S, SAS, Fixed Width File and Quantum exports.

- o **Fixed Width** - in addition to the capabilities of the Simple (Delimited) Template, the Fixed Width template allows column positions to be specified by assigning Start and Finishing columns or specifying the column Length. You will have access to more additional functions in the Template editor, which will allow you to change variable properties. For example: you will be able to set Bitstring or Spread to one or a group of multi variables, and you will be able to change the length of columns for one or a group of variables (for multi/ single/quantity/character only). These templates are suitable for the following exports: Triple-S, SAS, Fixed Width File and Quantum. If you use this template type for Quantum exports and the project contains loops, a Multi Trailer Card data set will be generated; otherwise a Single Card data set. If you wish to generate a Single Card data set for projects with loops, you must first flatten the project.
- o **Quantum** - in addition to the functions available in Fixed Width templates, a Quantum template will give you two additional columns in the editor. These represent the Start and Finish Card. These are editable. If the project contains loops, a Multi Trailer data set will be generated; otherwise a Multi Card data set will be generated.

4. Click **Next**.

This next step is only valid if you have selected Quantum. In this case the Punch Card Details dialog opens. If you have selected Simple or Fixed Width, go directly to step 7 in this procedure.

Note: If you have started from the Data Processing > Templates menu, the Project Selection page now opens. Select the project on which the template is to be based, then click Next.

Figure 6 The Punch Card Details dialog

The options/properties here are:

- **Maximum card size** - specify the total number of columns on each card. The default value is 1000 (the limit for Quantum).
- **Serial length** - allows you to specify the number of columns required for the serial field. This field is not visible in the template, and will be used for reserving space for the storage of serial values. The default value is 8.
- **Card type length** - allows you to specify the columns required for the card number field. The card number is stored on every card. The maximum allowed value is 27. The default is 2.
- **Split all variables over card** - when the category list of a variable exceeds the defined card size, the remaining categories will be written on the next card. The variable can therefore be split over several cards. This is the default behavior. By un-checking this option, the following happens: the template will be generated and an error will be displayed in the Error column in the template editor. This will allow you to either delete the variable or decrease the length of the variable by assigning spread (when this variable is a multi). Alternatively you can generate a new template and increase the number for the Maximum card size option.

6. Make the desired selections and click **Next**.

7. Select the project you wish to use (if the list is extensive you can use the search facility to find the desired project) and click **Next**.

The Advanced Options dialog opens.

Advanced Options

Schema Language

English

Text in Question Labels

Title Only

Text in Answer Element Labels

Answer Label (Question Label)

Multi Questions with Loop Reference Answer List

As Standard Multis (flat)

Split Multis in separate variables

☐

Flatten Template

☒

Exclude all open questions

☐

Truncate Open Ends

200

Template Default

☒ Include all variables in the Template
 ☐ Empty Template

Save current options as default

☐

Cancel

< Back

Next >

Finish

Figure 7 The Advanced Template Options dialog

The properties and options available for Simple templates are:

- **Schema Language** - this drop-down will list all the languages available in the project you have selected above. Select the language you wish to use for the template.
- **Text in Question Labels** - select the type of question labels you wish to use. The options are:
 - o **Text Only** - the label element will contain only the text of the question.
 - o **Title Only** - the label element will contain only the title of the question.
 - o **Title and Text** - the label element will contain the question title followed by the question text.
 - o **Question ID** - the label element will contain the question id.
- **Text in Answer Element Labels** - allows you to specify whether the Answer element of a Grid / Open Text List / Numeric List Question is to be positioned in front of the Question label, after the Question label or without the Question label when exporting survey data or when generating a Survey Data Template which can be used for a survey data export. The content of the Question label depends on the Text in Question Labels setting, which allows you to specify whether you want the Question ID, Question text, Question title or Question text and Title exported. Select the text you wish to be included as the answer labels. The options are:
 - o **Answer (Question label)** - the question label is placed after the answer element.
 - o **Question label (Answer)** - the question label is placed before the answer element.
 - o **Answer label** - the answer element is placed without the question label.
- **Exclude Hierarchy/Table Lookup Labels** - if a question in the survey to which the template is linked is set to Hierarchy or Table Lookup, then this option becomes available. As the list of labels for hierarchy or table lookup questions in the schema file could potentially be a very long, you can check this option to exclude the list of labels from the schema file.

- **Multi Questions with Loop Reference Answer List** - This option is only relevant for surveys stored in optimized database format. With this setting you can specify how Multi questions using loop references are to be stored in the Template, and thereby the data structure in the survey data export.

Example: A survey contains a Multi question q1 using a loop reference which contains a list with 2 answers (1, 2). For further information about how to link questions to a loop, refer to Linking a Question to a Loop in the Confirmit Authoring User Guide.

- o If you select "As Standard Multis (flat)", the Multi question will be stored on the responseid level. If in addition you select "Split Multis in separate variables", two logical variables will be generated (q1_1 and q1_2). Without this setting a standard Multi question will be generated. This is the same behavior pattern as for a Multi question that does not use a loop reference.

Note: Survey data that was exported using a Template generated with this option cannot be imported back into the survey.

- o If you select Within Loop, the Multi questions will be stored as Single questions in the loop that is used as reference.
- **Multiple Format** - Fixed Width and Quantum templates have this additional option. Use this to define whether you wish to use BitString or Spread:
 - o **Bitstring** - select this option to generate a Triple-S XML template for which data is recorded with one character per category of the corresponding variable. A character "1" is used to signify that a category has been selected; a character "0" signifies that a category is not selected. The category value refers to the relative position of the 0/1 code in the data field. Therefore a category value of 9 will always refer to the code in the 9th location of the data field even if some of the lower category values have not been defined. The data field length is defined by the highest category value. This means that with nine category values, nine fields in the data will be used. Using this storage type, Multi variables with long category lists will require a large data field length. In these cases you are recommended to use Spread instead. This can be selected as Multiple format when generating the template, or assigned to one particular variable or a group of variables in the Template Editor.
 - o **Spread** - select this option to generate a Triple-S XML template for which data is recorded as a series of sub-fields, each containing one category value of the variable. The data sub-field length is the minimum number of characters required to represent the largest category value in the Values block. Thus variables with category values up to 9 have a data sub-field one character long; variables with category values up to 99 have a data sub-field length of 2, etc. With this storage type it is possible to reduce the field size for multi questions, so it is recommended particularly for variables with long lists of category values. You can change this property for Multi variables in the Template Editor anytime.
- **Recode Multis** - [only for Fixed Width templates] Check this box to recode value codes for non-sequential multi variables. For example, a multi variable with the answer codes 1, 2, and 99 will normally use 99 positions in the export, although only three are actually required. With this setting, the variable will then use only three positions. If you have many multi variables with non sequential codes, selecting Recode Multis will greatly reduce the size of the exported file. The option selected here will be stored with the template so it can be reused when adding multis from the pool or from the project.
- **Split Multis in separate variables** - logical variables will be generated from each category for all Multi variables of format "BitString" in the template. For example, a Multi question q5 with 3 categories (1, 2, 99) will result in 3 logical variables (q5_1, q5_2, q5_99). These generated logical variables can be positioned in the generated survey template by moving them or by allocating specific columns.
- **Flatten Template** - with the flattening process, a survey template that includes loops will be simplified such that the loops are converted to a number of 'standard' variables. This means that loop data will be expanded, and variables will be created to represent each iteration of each question.
- **Exclude all open questions** - check this box to exclude the following question types from the generated template: Open Text, Open Text List, 'Other-specify' from answer lists, Multi questions with Open Text property selected.
- **Truncate Open Ends** - for Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified, texts longer than this limit will automatically be truncated.
- **Template Default** - either include all the available variables in the template or create an empty template.

- **Save current options as default** - saves the current settings as the default template (see Creating a Default Template on page 11 for more information), which will be created when you click the **New Template** button.
8. Choose the desired options.
 9. Click **Finish**.

The Variable Selection page opens as shown below. Here you select the variables that are to be included in the template. Note that there is a maximum limit to the number of variables you can select. This limit is set in the server, so for On-Premise users it can be adjusted by the server administrator.

You can select the columns that are displayed in the Available and Selected Variables lists; click the appropriate **Columns** button and select the columns you wish to see. The columns selected will be remembered by the system and will be presented in future sessions.

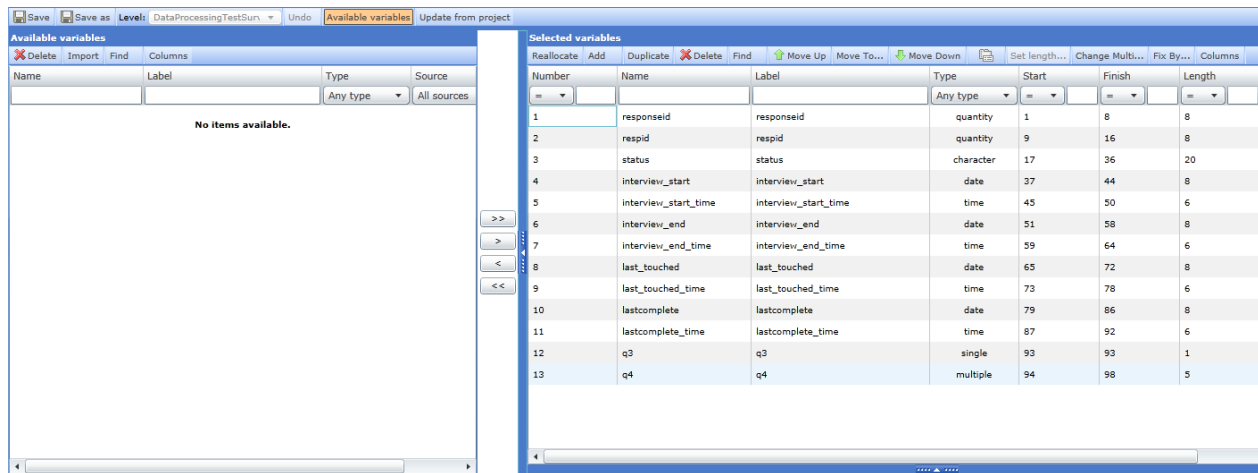


Figure 8 Example of the Choose Questions page for a Delimited template

When generating a Survey Data Template for a project which contains loops, the loops will be represented as levels in the drop-down menu. Each level can be selected individually for editing tasks.

Note: When the Template is flattened (see How to Flatten a Template on page 38 for more information), this drop-down menu will be grayed out.

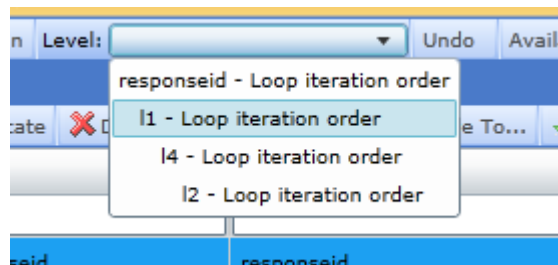


Figure 9 Example of the loop level drop-down

10. In the Available Variables list, use standard Windows selection techniques to select the questions you wish to include in the template, then click the **>>** button to move the selected questions to the Selected Variables column.
11. When you have selected the variables you require, click **Save** to save the changes.

The new template is added to the list, its location depending on how the list is currently sorted. Note that if you make changes in the editor and attempt to leave before you have saved, a confirmation message dialog will be presented.

2.1.2. Creating a Default Template

If you use one type of template fairly regularly, you may wish to create a default template so you avoid having to repeat the same setup time and again. When a default template is defined, whenever you create a new template then the default settings will be applied; you can then change the settings as necessary before saving the new template.

Note that if you have System Administrator permission you can set up a default template for your company (go to the **Home > Company > Default Survey Data Template Settings** menu item). This default template's settings will then be applied initially to any template created by the users in your company. The users will be able edit the new template and save it, but will not be able to change the default.

To create a default template as a user:

1. Go to **Home > User > Default Survey Data Template Settings**.

The Default User Template Settings page opens. Here you setup the default template generation settings that will be used during template generation. Note that the properties and options for all the tabs are described in the How to Create a New Template section (see How to Create a New Template on page 6 for more information).

Figure 10 The Default User Template Settings page - General Options tab

2. Select the required template and project schema types, then go to the Advanced Options tab.

Save and Use as User Settings Delete Default User Settings

General Options Advanced Options Quantum Options

Schema Language English (United States)

Text in Question Labels Title Only

Text in Answer Element Labels Answer Label (Question Label)

Multi Questions with Loop Reference Answer List As Standard Multis (flat)

Exclude Hierarchy/Table Lookup Labels ☐

Multiple Format ☐ Bitstring ☒ Spread

Recode Multis ☐

Split Multis in separate variables ☐

Flatten Template ☒

Exclude all open questions ☐

Truncate Open Ends 200

Template Default ☒ Include all variables in the Template ☐ Empty Template

Figure 11 The Default User Template Settings page - Advanced Options tab

- Again, make the settings as required, then go to the Quantum Options tab if necessary.

Save and Use as User Settings Delete Default User Settings

General Options Advanced Options Quantum Options

Maximum card size 1000

Serial length 8

Card type length 2

Split all variables over card ☒

Figure 12 The Default User Template Settings page - Quantum Options tab

- Make the settings as required.
- Click **Save and Use as User Settings**.

The settings you have made here will now be saved as default, and will be applied whenever you click the **New Template** button (see How to Create a New Template on page 6 for more information).

Note: The User default setting has higher priority than the Company default setting. So if a user has saved User Default settings (see above) and the company also has Company Default settings, the template wizard will use the User settings as default. If the user deletes his own settings (clicks the Delete Default User Settings button), then the template generation wizard will use the company level default settings if a company default template is created. If no company default settings have been saved, then the default system settings (which cannot be changed by the user) will be used.

User level settings can also be saved from the last step of the template generation wizard; to do this click in the **Save current options as default** check-box (see How to Create a New Template on page 6 for more information).

2.1.3. How to Import a Template

If a Template has been exported from a server and sent to you (by email), you can import that template into your current server. To do so:

1. Open the email and save the attached .zip file into a suitable folder on your network.
2. In the Confirmit Template List page, click the **Import Template** button located towards the right end of the page toolbar.

The Import Survey Data Template dialog opens.

Figure 13 The Import Survey Data Template dialog

3. Click on the **Browse** button to open a standard File Select window, and find and select the template file you wish to import.
4. Type into the Template Name field the name you wish to give to the template you are importing.
5. Select the appropriate character encoding for the imported template file.
6. Click **OK**.

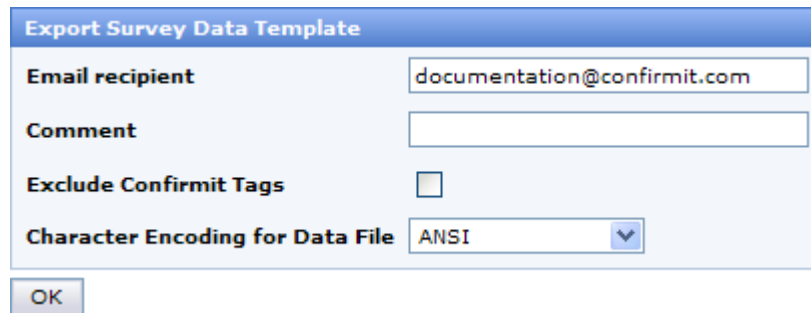
A Task page opens with a progress bar, a list of the processes and the current status. When the import task is completed, click **OK** to close the task page and return to the template list. The imported template is now included in the list, its location depending on how the list is sorted. You can now use the template when importing and exporting survey data.

When a template is imported, all variables in the template will be assigned the current project ID. You can change the project (see How to Link a Template to a Different Project on page 15 for more information).

2.1.4. How to Export a Template

1. In the Template List page, click in the Template Name field for the template you wish to export (not on the link as this opens the template) and then select **Export** from the pop-up menu that opens.

The Export Survey Data Template dialog opens.



The dialog box is titled "Export Survey Data Template". It contains the following fields and controls:

- Email recipient:** A text field containing "documentation@confirmit.com".
- Comment:** An empty text field.
- Exclude Confirmit Tags:** An unchecked checkbox.
- Character Encoding for Data File:** A dropdown menu with "ANSI" selected.
- OK:** A button at the bottom left.

Figure 14 The Export Template dialog

2. Check / edit the email address to which the rule is to be sent, and add a comment, as necessary.
3. Check the Exclude Confirmit Tags box if required (see Confirmit Tags on page 182 for more information).
4. Select the appropriate character encoding for the exported template file.
5. Click **OK** to commence the export task.

A Task page opens with a progress bar, a list of the processes and the current status. An email is sent to the specified address with the zipped template file attached. This template file must now be imported into the destination server (see How to Import a Template on page 13 for more information).

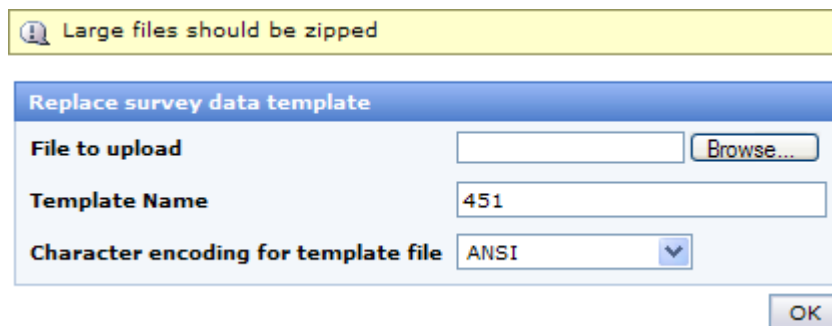
Click **OK** to close the Task page and return to the Template List.

2.1.5. How to Replace a Template

You can import a template, over-writing an existing template in the process. This may be useful for example if you are to make changes to a template that is in use and wish to check that the changed template functions correctly before making it available to the users. In this case you can export the template to yourself in the normal manner, edit it off-line, then re-import it using the Replace procedure. Proceed as follows:

1. Have the "new" template available on your network.
2. In the Template List, click on the template you wish to replace, and select **Replace** from the drop-down menu.

The Replace Survey Data Template dialog opens.



The dialog box is titled "Replace survey data template". It contains the following fields and controls:

- File to upload:** A text field with a "Browse..." button to its right.
- Template Name:** A text field containing "451".
- Character encoding for template file:** A dropdown menu with "ANSI" selected.
- OK:** A button at the bottom right.

At the top of the dialog, there is a yellow information banner that reads: "Large files should be zipped".

Figure 15 The Replace Survey Data Template dialog

3. Browse to and select the template you wish to import.
4. If you wish to change the name of the template, type the new name into the Template Name field.
5. Select the appropriate character encoding for the template file.
6. Click **OK**.

A Task page opens, showing the progress of the import task.

7. When the task has completed, click **OK** to close the window.

The template you selected to be replaced is updated.

2.1.6. How to Duplicate a Template

If you need to create a template that is very similar to an existing one, you can achieve this easily by duplicating the original template and then editing the new version. To duplicate a template:

1. In the Template List, move the mouse pointer over the Template Name field of the template you wish to duplicate, then click the down-arrow that appears to the right end of the field.

A drop-down menu appears.

2. Click **Duplicate**.

The Duplicate Template dialog appears.

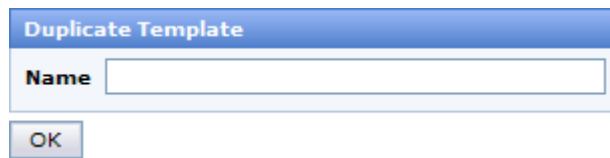


Figure 16 The Duplicate Template dialog

3. Type a name for your new template into the Name field, then click **OK**.
4. On completion, click **OK** to return to the Task List, where your duplicate template will be listed.

You can now edit your new template as required.

2.1.7. How to Link a Template to a Different Project

A template that was created for one project can be linked to a different project. Also, when a template is imported, all variables in the template will be assigned the current project ID. It may then be useful to be able to change the project to which the template is linked. For example, if you want to reuse a template for a similar project; you will then only need to update the template with the changes from the new project. To change the project:

Note: If the template is not currently linked to a project (the Project ID field is empty), then click Change to link the template to a project.

1. Go to the **Survey Data > Templates** menu command.
2. Find the template you wish to change the project for.
3. In the Project ID column, click the **Change** link for that template.

A Project List dialog opens, listing all the projects on the current server to which you have access.

4. Select the project to which you wish to link the template.
5. Click **OK**.

The template is moved to the selected project and the details in the Template List are updated.

2.1.8. Template Permissions

The user who creates a template has full administrator rights to that template. All other users have no rights; they cannot even see the template in their template list, until the creator has allocated the appropriate rights to them.

If a template is linked to a project, you can set that the template permissions are to be inherited from that project. Then if the user has for example Read access to the project, the user will also have Read access to the template.

However, the templates a user has implicit access to will only be listed when the user filters on a specific project, for example when accessing through **Survey Data > Templates** or using the Template Source = "Current Project" filter. When the user is viewing the entire Template List, only those templates that he/she has direct access to will be listed.

To set a user's permission for a template, click the down-arrow in the Permission Type column and select the appropriate permission. On completion, save the changes. The template permissions are:

- Inherit from project - the user has the same access to the template as to the project (Read, Write or Delete. Note that Administrate is not inherited).
- None - the user has no access to the template irrespective of the user's access to the project.
- Read, Write, Delete, Administrate - these are direct accesses. Any permission the may user have to the project is ignored in this case.

Note: Inherit from project is the default when generating a new template.

2.1.9. How to Include Multiple Languages in a Template

If you have created a survey with several languages, you may wish to create export templates for more than one of the languages. Confirmit allows you to create a template for one language and then change only the language of the labels – you do not have to create new templates for each language. For this example, assume you have a survey using two languages; English and French, and your original template is to be in English.

1. Create a fixed-width template (Template1) in English, and make any changes required to the column positions in that template so that it matches your export order.

You now wish to generate a template with the same column positions but with the labels in French. Proceed as follows:

2. Duplicate Template1 and rename the duplicate to for example Template2.

Template2 now needs to be edited as follows:

3. In the template editor, fix the positions of the existing variables. To do this:

- o Use **Fix by > Position**.
- o Select **Change All**.
- o Click **Save**.

4. Click the **Import** button in the blue bar above the 'Available Variables' (left) pane of the template editor.

A Confirmation box opens.

5. Click **Yes** to confirm the operation.

6. Go through the import process selecting the test/production database and the appropriate project.

7. On the Advanced Template Options screen, change the Schema Language to **French**. Do not change the other options (bitstring/spread, truncate open ends etc).

8. Click **Finish**.

The template generator task runs and a Confirmation box appears.

9. Click **Replace** so that existing variables are replaced by the variables in the newly generated template.

On the next screen you can go through the variables that will be replaced individually by using the **Yes/No** buttons, or select **Replace All**.

If there are any new variables or answer categories then you will also have to follow the procedure for adding these to the template ([go to Creating a New Template by Duplicating and Editing an Existing for more information](#)). If you merely wish to update the language then:

10. Click **Save**.

Template2 now contain French labels.

2.1.10. The Template Editor

The Template Editor is the screen you use when viewing and editing schemas within a selected Template (see How to Create a New Template on page 6 for more information).

Note: Microsoft Silverlight® is freely available and must be installed on your computer prior to running the Template Editor. In the event Microsoft Silverlight® is not installed then a blank window with the download link is displayed instead of the Template Editor window. Click on the link to install the application.

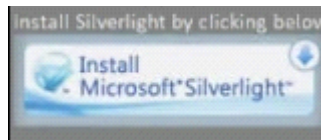


Figure 17 The download link for Microsoft Silverlight®

Note: Silverlight is not supported by Internet Explorer 64 bit. If you install Silverlight and attempt to use it a Microsoft error message will be displayed. The error message is misleading as it says that you do not have Silverlight installed, but if you return to the MS site it will confirm that you have the latest version installed.

Three types of template are available:

- Simple Delimited (see The Simple Template on page 3 for more information).
- Fixed Width (see The Fixed Width Template on page 3 for more information).
- Quantum (see The Quantum Template on page 4 for more information).

To open the Template Editor page:

1. In the **Data Processing** menu, select **Templates**.

The Template List opens as shown below.

Survey Data Template List							Confirmit. everywhere
Select Survey Data template							
Home End Users Data Processing Project Management Designer Respondents Reporting Surveys User: Apple, Adam Log Off							
Current Rule Current Rule Set Rule List Rule Set List Templates Data Central Project List							
Delete Search Reset Template Source All Projects/Templates New Template Import Template							
ID	Type	Template Name	Company	Created By	Created	Project ID	
1073	Quantum	DuplicateQuantum	Confirmit	Apple, Adam	08/02/2010 11:19:31		
1062	Quantum	DuplicateQuantum	Confirmit	Apple, Adam	05/02/2010 10:25:39		
1058	Quantum	Quantum	Confirmit	Apple, Adam	04/02/2010 15:37:41	p2661497	
1055	Quantum	Quantum template Doc1	Confirmit	Apple, Adam	04/02/2010 15:37:15	p5111409	
994	Delimited	Simple Template 1	Confirmit	Apple, Adam	01/02/2010 13:56:56	p5111409	
17	Fixed Width	DocTest1	Confirmit	Apple, Adam	04/06/2009 13:20:20		

Figure 18 Example of the Template list

The Type column allows you to identify the template type; Delimited, Fixed Width or Quantum.

2. Click on the name of the required template in the Template List, or move your mouse pointer into the Template Name cell of the template row, click on the drop-down menu arrow and choose **Edit**.

The message "Please wait while schemas are downloading from server" is displayed. On completion, the Template Editor page opens.

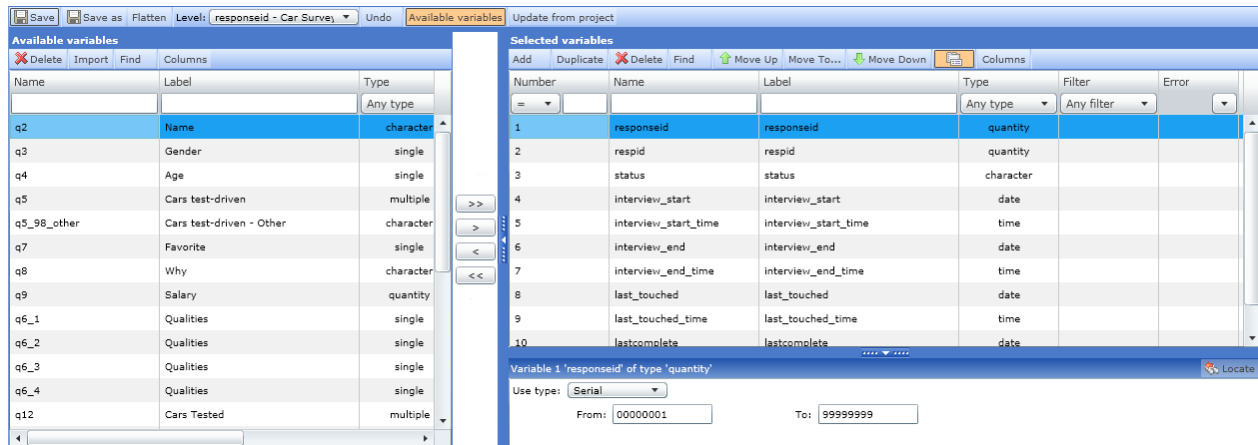


Figure 19 Example of the Template Editor page

This page is organized into three panels:

- The Available Variables panel contains a list of the available variables that are not currently selected for the template. You can select which columns are displayed in the list, and the order in which they are displayed (see How to Show and Hide List Columns on page 38 for more information). Imported variables will be loaded into the Available Variables panel.
- The Selected Variables panel lists the variables that are selected for inclusion in the template. You can select which columns are displayed in the list, and the order in which they are displayed (see How to Show and Hide List Columns on page 38 for more information).
- The Variable Details panel displays the details of the variable currently selected in the Selected variables panel. The properties displayed depend on the type of the variable. If you need more space on the screen, you can open and close this frame by clicking on the **Pane Open/Close** button in the border, or resize it by clicking on the blue frame and dragging it up or down.

In this page you can navigate through the available variables, change the way variables are displayed, change the template-related properties of the variables (see How to Add Variables to the Template on page 29 for more information), and update the template from the project (see How to Update the Template from the Project on page 39 for more information). You can 'flatten' a template (see How to Flatten a Template on page 38 for more information), you can save an existing template under a different name (click **Save As**), and you can undo changes (click **Undo**). You can also filter the displayed variables, sort them by their properties, and search for variables (see How to Navigate through Variables in the Template on page 27 for more information). Note that when searching, you can use the * and ? characters as wildcards in the column search fields.

For all template types, the toolbar in the Selected Variables panel allows you to:

- Add variables to the Template (see How to Add Variables to the Template on page 29 for more information).
- Duplicate variables (see How to Duplicate Variables on page 35 for more information).
- Delete variables from the Template (see How to Delete Variables from the Template on page 37 for more information).
- Move variables within the Template (see How to Move Variables within the Template on page 36 for more information).
- Customize the template view.

For Fixed Width and Quantum templates:

- Modify Assign Start, Finish Length values (see How to Assign new Range Values to a Variable on page 35 for more information).
- Set Spread (see The Spread Format on page 181 for more information) or BitString (see The Bitstring Format on page 180 for more information).
- Set Length - The column length can be changed using "Change length To" or "Change length By".
- Change Multi - Multi variables can be changed in several ways (see Changing a Multi Variable on page 34 for more information).

For Quantum templates:

- Start Card and Start Position allow you to change the cards.

Important
After you have made changes to the Template, click Save to save the modifications. If you do not do this, any changes you have made will be lost.

2.1.10.1. Variable Types

The available variable types are as follows (see Mapping Confirmit Variables on page 40 for more information):

System Variables		
Confirmit variable name	Description	Triple-S
respid, responseid	ID of respondent and response respectively.	quantity.
rowguid	used for matching rows when writing data from data sources.	character.
status	status of the interview.	character.
interview_start, interview_end, last_touched, lastcomplete	date and time of corresponding events.	will be split into pairs of date + time variables, e.g. interview_start (for date) and interview_start_time (for time).
linkvar<variable_name>	linking variable that appears in both child and parent levels of Templates with hierarchies.	character.

Common Variables		
Confirmit variable type	Description	Triple-S
single	categorical with one response allowed.	single.
multi	categorical with any number of responses.	multiple.
open text	character value.	character.
open text numeric	numeric value (integer or real).	quantity.
grid		will be split into a set of single variables, one for each element in the answer list.
loop	loop variable.	single.
multi open text	character value.	will be split into a set of character variables, one for each element in the answer list.
multi numeric	numeric value (integer or real).	will be split into a set of quantity variables, one for each element in the answer list.
multi ranking	numeric value (integer or real).	will be split into a set of quantity variables, one for each element in the answer list.
other, specify fields	character value.	character.

Go also to <http://www.triple-s.org/> for details.

2.1.10.2. Variable Properties

Variables within the templates have two kinds of properties:

- Common properties, which are displayed for all variables as a table in the upper right panel of the Template Editor page.
- Type-specific properties, which are displayed for the currently selected variable in the lower right panel of the Template Editor page.

All properties can be changed, either by typing a new value into the field or by choosing a value from the associated drop-down list. If a non-legal value is specified, then a message displaying a description of the error appears.

Note: The name of the variable cannot be changed.

The common properties displayed in the upper panel are as follows:

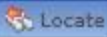
- **Number** - indicates the position of the variable within the template, and the order in which variables are displayed within the variable list. You cannot change the ID directly but you can do it by moving variables within the template.
- **Name** - the name of the variable, representing the Question ID in Confirmit. This cannot be changed.
- **Label** - label of the variable (see Mapping Confirmit Variables on page 40 for more information). The label of the variable represents the Question Title in Confirmit. You can change the label of a variable by double-clicking on the **Label** cell of the variable and typing the new label in the text field.
- **Type** - type of the variable. Available types are as follows: character, date, logical, multiple, quantity, single, time (see Variable Types on page 19 for more information). You can change the type by clicking on the **Type** cell of the variable and selecting the type from the drop-down list.

Important

When you change the type of a variable, any properties that are common for the old type and the new type remain, in addition to their values. Properties that are available for the old type only are deleted. New properties that become available for the new type are given default values.

When you click on the Type field and select a new type for a variable, a notification dialog displays prompting you to confirm the type changing operation. Click OK to confirm or Cancel to cancel execution of the operation.

In the examples shown below, the type of the variable is changed from 'multiple' to 'single'. Properties such as Category Number, Code and Value, along with their values, remain unchanged. However the Use Spread property is deleted, and properties such as Format and Score are created.

Variable 96 'q42' of type 'multiple' 

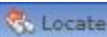
Use spread: ☐

Use range: ☐

Add  Delete  Move Up  Move Down

#	Code	Value
1	1	Teletext
2	2	Cable TV
3	3	Satellite
4	4	Internet
5	5	None of these

Figure 20 Example of the variable type being changed from Multiple to Single, before the change

Variable 96 'q42' of type 'single' 

Format:

Use range: ☐

Add  Delete  Move Up  Move Down

#	Code	Score	Value
1	1		Teletext
2	2		Cable TV
3	3		Satellite
4	4		Internet
5	5		None of these

Figure 21 Example of the variable type being changed from Multiple to Single, after the change

The following properties are related to the range which a variable occupies within the template. The range determines the location and the size of a variable within the template. Note that these properties are only available in Fixed Width and Quantum templates.

- **Start** - specifies the start column of the variable. You can change the range start value by double-clicking on the **Start** cell of the variable and typing the new value in the input field.
- **Finish** - specifies the end column of the variable. You change the range start value of a variable by double-clicking on the **Finish** cell of the variable and typing the new value in the input field.

Note: Ranges of different variables must not overlap. When the start and/or finish values of one variable are changed in such a way that the range overlaps the range of another variable, a Range Overlap error is generated. In this case, the Errors fields of the variables with overlapping ranges display the error message and the variable rows are highlighted in red.

- Quantum templates have two additional columns: **Start Card** and **Finish Card** - these represent where the card containing the data is stored.
- **Length** - specifies the length of the variable, which is determined by the start and finish values. You can change the range length value of a variable by double-clicking on the **Length** cell of the variable and typing the new value in the input field.

Note: The minimal length requirement must be kept for every variable. When the length of a variable is less than the allowed minimal length, then the insufficient range length error occurs. In this case, the Errors field of the variable with insufficient length indicates the error message and the variable row is highlighted in red.

The minimum length requirements differ depending on the variable type:

- o **Character** - the minimum length is the same as the numeric size value specified in the **Size** field of the lower right panel.



Figure 22 Properties of a Character variable

- o **Date** - the minimum length is 8, which corresponds to the date format YYYYMMDD.



Figure 23 Properties of a Date variable

- o **Logical** - the minimum length is 1, which corresponds to the size of the possible values TRUE/ FALSE.
- o **Multiple** - the minimum length is the same as the numeric value specified in the **To** field of the lower right panel unless the **Use Spread** option is checked (see The Spread Format on page 181 for more information). If the option is checked, then the minimum length equals the product of the numeric value specified in the **Subfields number** by the numeric value specified in the **Subfields width** (in the example below, $2 * 12 = 24$).

Variable 25 'any_call' of type 'multiple' Locate

Use spread: ☒ Sub-fields number: Sub-field width:

Use range: ☒ From: To:

Add ☒ Delete ☐ Move Up ☐ Move Down ☐

#	Code	Value
1	1	Complete
2	2	Appointment
3	3	Call back am
4	4	call back pm
5	5	No reply
6	6	Engaged
7	7	Unobtainable
8	8	Respondent Refusal
9	9	Company Refusal
10	10	Quota fail
11	11	User1

Figure 24 Properties of a Multiple variable

- o **Quantity** - the minimum length equals the number of digits of the numeric value specified in the **To** field of the lower-right panel.

Variable 32 'q4a' of type 'quantity' Locate

Use type:

From: To:

Figure 25 Properties of a Quantity variable

- o **Single** - the minimum length is 2 unless the Use Range option is checked. If the option is checked, then the minimum length equals the number of digits of the numeric value specified in the **To** field of the lower-right panel.

Variable 7 'p2_4' of type 'single' Locate

Format: Numeric

Use range: ☒ From: To:

Add ✖ Delete ⬆ Move Up ⬇ Move Down

#	Code	Score	Value
1	1		Strongly disagree
2	2		Slightly disagree
3	3		Neither agree nor disagree
4	4		Slightly agree
5	5		Strongly agree
6	6		Don't know

Confirmit 14.0 Systemtest 2 © 2009 Confirmit

Figure 26 Properties of a Single variable

- o **Time** - the minimum length is 6, which corresponds to the time format HHMMSS.

Variable 10 'newVar' of type 'time' Locate

From: To:

Figure 27 Properties of a Time variable

Note: Click **Reallocate** in the upper left corner on the toolbar to automatically allocate variables by their range values and IDs in ascending order. Note that the range values of the variables may be changed in accordance to the set **Fix by rule** (see below for detailed information). Reallocation may also change the ID of the variables. The **Reallocate** button is not available in Simple templates.

- **Filter** - indicates whether the variable has a filter assigned to it. A filter is a logical variable that filters the variables that you can see in the Template Editor (it does not affect the export or anything else). This can be achieved by generating a logical filter first, then this variable can be used to "flag" a particular variable or group of variables. Any variable except the logical one can be assigned a filter by clicking on its **Filter** cell and selecting a logical variable from the drop-down menu.

Note: The ID value of the logical variable assigned as a filter must be lower than the ID value of the variable to which it is assigned, i.e. the filter variable must be placed before the variable to which it is being assigned. This can be done by moving the logical variable (see [How to Move Variables within the Template on page 36](#) for more information).

ID	Name	Label	Type	Start	Finish	Length	Filter	Fix by	Error
3	responseid	Link to parent record	quantity	1	10	10		None	
5	p1	P1. Competitive Price Perception	single	13	13	1		None	
4	brand_p1	Brand Selection P1	single	11	12	2		None	
2	newVar	newVar	logical	24	24	1	-None- newVar	None	
1	p1_lev	Loop iteration	quantity	14	23	10		None	

Figure 28 Example of applying a Logical variable as a filter

- **Errors** - indicates whether the variable has errors related to range overlaps or insufficient length (see above for details). When a variable has an error, its row is highlighted in red, and the Errors cell contains a brief error description and recommended solution. When you point the cursor over an Error cell containing the error description, a floating text appears displaying the same error description so you do not have to resize the column to read it. When a variable that has no errors is selected, it is highlighted in blue.
- **Fix by** - specifies which range parameter of the variable remains unchanged when reallocation of variables is applied (see Reallocating Variables on page 37 for more information). or Update from Project is executed (see How to Update the Template from the Project on page 39 for more information). To change the Fix by parameter for a variable, click on the variable's Fix by cell and choose the desired value from the drop-down list.

Available values are:

- o **None** - the start range value of the variable in question becomes higher than the range end value of the previous variable by 1, i.e. no gaps are left between the range start of the variable in question and the range end of the previous variable. The length is set to the minimal length value, which depends on the type of the variable (see above for details). Thus all range values of the variable (start, finish and length) are changed. In the example, displaying the range values of a quantity variable 'resp' before reallocation, you can see that its range start value is 12 whereas the range end value of the previous variable 'responseid' is 10. This makes a gap of 2 units between the variables' ranges. The range length of variable 'resp' is 12, whereas the default minimal length for a quantity variable is 8.

ID	Name	Label	Type	Start	Finish	Length	Filter	Fix by	Error
1	responseid	Record ID	quantity	1	10	10		None	
2	resp	Respondent id	quantity	12	23	12		None	

Figure 29 Example of Range values before reallocation, with None selected as the Fix By rule

When you apply **Reallocate** you will encounter the following changes: the range start value will be set to 11, and the range length value will be set to the default value for this type, in this case 8. The range end value will be changed to 18.

ID	Name	Label	Type	Start	Finish	Length	Filter	Fix by	Error
1	responseid	Record ID	quantity	1	10	10		None	
2	resp	Respondent id	quantity	11	18	8		None	

Figure 30 Example of Range values after reallocation, with None selected as the Fix By rule

- o **Position** - the range values of the variable are not changed so its position is not changed. In this example, the variable 'resp' is Fix By position. When you apply Reallocate, the Start and Finish values will remain unchanged

ID	Name	Label	Type	Start	Finish	Length	Filter	Fix by	Error
1	responseid	Record ID	quantity	1	10	10		None	
2	resp	Respondent id	quantity	12	23	12		Position	

Figure 31 Example of Range values after reallocation with Position selected as the Fix By rule

- o **Length** - the range start value of the variable becomes greater than the range end value of the previous variable by 1. i.e. no gaps are left between the range start of the variable in question and the range end of the previous variable. However, the length of the reallocated variable remains unchanged so only the start and end values may change. In the example below, as a result of reallocation, the range start value is set to 11 and the range length value is left unchanged. The range end value is changed to 22

Save											Reallocate											Levels: ITALY_sss_responseid.0											Add											Duplicate											Delete											Find											Move Up											Move To...											Move Down																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																										
ID	Name	Label	Type	Start	Finish	Length	Filter	Fix by	Error																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																				

Figure 32 Example of Range values after reallocation with Length selected as the Fix By rule

When you click the **Fix by** button in the Selected Variables page toolbar, the Fix by... overlay opens.

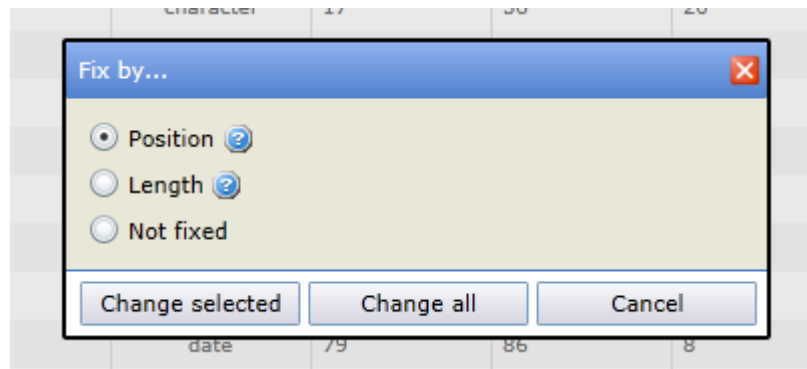


Figure 33 The Fix by... overlay

This overlay allows you to apply the selected parameter to all variables or just those you have already selected. The options are:

- o **Position** - The column positions specified in the Start and Finish columns will be fixed. Use this function to maintain the column positions when updating the Template with the changes in the project running the "Update from project" process, and to maintain the column positions when exporting Survey data.
- o **Length** - The variable length specified in the Length column will be fixed. Use this function to maintain the variable length when updating the Template with the changes in the project running the "Update from project" process, and to maintain the length when exporting Survey data.
- o **Not fixed** - changes the selected variables or all variables to **Fix by = None**. This means the variables are not fixed by positions or length.

The type-specific properties (see Variable Types on page 19 for more information) displayed in the lower panel are as follows:

- **Use type** - describes the role of this variable in the survey. This property is available for quantity variables. Available values are:
 - o **None** - means that the variable does not contain weight or serial number (default value).
 - o **Serial** - means that the variable contains the serial number (or other identification field) for the case.
 - o **Weight** - means that this variable contains a case weight.
- **From** - defines the minimal numeric limit of the variable's value. This property is available for date, time, quantity, single and multiple variables.
- **To** - defines the maximal numeric limit of the variable's value. This property is available for date, time, quantity, single and multiple variables.
- **Serial** - this check-box defines whether the variable contains the serial number (or other identification field) for the case. This property is available for character variables. For example, the responseid would have set use type=serial.
- **Size** - defines the maximal length of the value string. This property is available for character variables.

- **Format** - is used to declare the format of the codes for the variable. This property is available only for single variables. Available values are:
 - o **None** - means that all the codes for the variable are to be treated as numbers (default value);
 - o **Numeric** - means that all the codes for the variable are to be treated as numbers;
 - o **Character** - means that all the codes for the variable are to be treated as characters rather than numbers. Character codes are case-sensitive (so "a" and "A" are different).
- **Use range** - this check-box defines if a limited range is used for the variable's value. If this option is checked, then the **From/To** fields appear (see above for more information).
- **Use spread** - indicates that the data values are coded as a series of category values in consecutive subfields rather than the default multiple format of a series of 0/1 characters (see The Spread Format on page 181 for more information). This property is available for multiple variables. If this option is checked, then two additional fields for two corresponding properties appear:
 - o **Subfield number** - defines the number of subfields within the overall field. The value must be a positive integer.
 - o **Subfield width** - defines the width of each subfield. The value must be a positive integer.

Note: There can be at most one serial variable, which may be a character variable or a positive integer quantity variable, and one weight variable, which must be a positive integer quantity variable. The data values must be unique and should not be missing. When you duplicate the serial or the weight variable, the duplicated variable will not be serial or weight, respectively. If you assign the weight or serial property to a variable when the weight or the serial variable already exists, then the dialog window appears prompting you to disable the serial or weight property for the current serial or weight variable, respectively, and to assign the property to the variable being edited.

Single (see The Spread Format on page 181 for more information) and multiple variables also have several additional properties, which are related to categories within these variable types. These properties are as follows:

- **Code** - denotes the code of the variable's category. This property is available for multiple and single variables.
 For single variables, if this attribute is not present or the **Format** property (see above for detailed information) is set to "numeric" then the code values must all be positive integers or the value zero. However when the **Format** property is set to "character" then all code values (even those that look like numbers) are treated as case-sensitive characters.
 For multiple variables, the code values must be positive integers.
- **Score** - allows score values to be assigned to the individual code values to be used for computing statistics such as Mean, Standard Deviation etc. This property is available only for single variables. The value must be a number, with or without a decimal point and decimal places. The omission of a score implies that records having that value code should be omitted from the base for any statistical computation for that variable.
- **Value** - defines the set of legal values and optional text labels for values (e.g. categorical codes).

You can manage categories of single and multiple variables by means of the buttons of the toolbar in the lower panel, which are as follows:

- **Add** - click this button to add a new category to the variable.
- **Delete** - click this button to delete the variable's categories selected in the category list.
- **Move Up** - moves the variable's categories selected in the category list one position up.
- **Move Down** - moves the variable's categories selected in the category list one position down.

Note: Ensure you have checked the validation settings (see Validation Rules on page 179 for more information) before manipulating the template by managing the variable categories (see Source Type > Survey Database on page 49 for more information).

2.1.10.3. How to Navigate through Variables in the Template

You can navigate through variables and view their properties, sort variables by their properties, filter the variables to be displayed, and search for variables by their name, label and values.

Templates generated from Confirmit projects with loops (refer to the Authoring User Guide for more information) contain hierarchies where questions within loops represent child levels. Every hierarchical level in these templates is a separate file. These files are edited separately from each other. You can select a particular level in the template by clicking the drop-down menu in the **Levels** field.

Important

To maintain the required look and functionality of Projects based on templates that contain hierarchies, it is recommended that you **DO NOT DELETE** system variables (see Variable Types on page 19 for more information).

The screenshot shows the Confirmit Template Editor interface. The top navigation bar includes tabs for Home, End Users, Data Processing, Survey Management, Designer, Respondents, Reporting, Survey Data, and User: Bennett, Nigel. Below this is a toolbar with buttons for Save, Save as, Source, Level, reference survey, Undo, Available variables, and Update from project. The main area is divided into two panels. The upper panel, titled 'Selected variables', contains a table with columns: Number, Name, Label, Type, Start, Finish, Length, Fix by, and Error. The lower panel, titled 'Variable 13 'q12' of type 'single'', shows the properties of the selected variable, including Format, Use range, and a table of codes and values.

Number	Name	Label	Type	Start	Finish	Length	Fix by	Error
9	lastcomplete	lastcomplete	date	59	66	8	None	
10	lastcomplete_time	lastcomplete_time	time	67	72	6	None	
11	q8	open - date	date	73	80	8	None	
12	q9	open - numeric	quantity	81	83	3	None	
13	q12	single - default options	single	84	84	1	None	
14	q13	single - boolean	single	85	85	1	None	
15	q1_1	ans1 (multi - default options)	logical	86	86	1	None	
16	q1_2	ans2 (multi - default options)	logical	87	87	1	None	

#	Code	Score	Value
1	1		ans1
2	2		ans2

Figure 34 Example of a template with hierarchical levels

Variables are displayed in the upper panel of the Triple-S Template Editor page as a table, which also displays the common properties of the variables. When you select a variable in this upper panel, the lower panel displays the type-specific properties of this variable (see Variable Properties on page 20 for more information).

Variables can be sorted by all common properties. To sort variables:

1. Click the header cell of the column displaying the property by whose value you want to sort variables.
Variables will be sorted by the value of the property in ascending order.
2. Click the header cell once again to sort variables in descending order.

The list of variables can be searched for variables by name, label and value.

1. Click **Find** on the toolbar above the upper-right panel.
The Find Variables dialog appears.

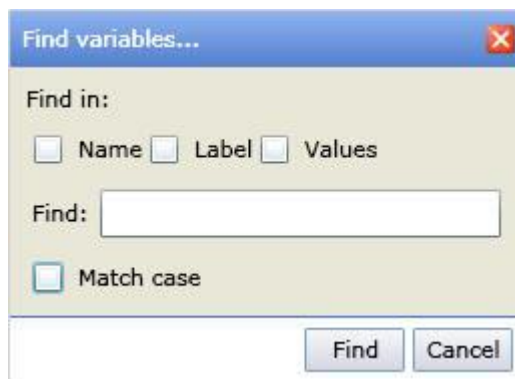


Figure 35 The Find Variables dialog

2. Select the properties by which you want to search, by checking the corresponding checkboxes.
3. Type the search string in the **Find** field.
4. Check **Match case** to enable a case-sensitive search.
5. Click **Find**.

When a variable that meets the specified searching criteria is found, it is highlighted in blue in the list of variables.

6. Click **Find** again to navigate to the next variable meeting the search criteria.

In the event no variables matching the search string are found, a window displaying the notification message appears:



Figure 36 Example of the Search Results Notification window when no variables are found

You can filter variables to be displayed by their common properties as well as assign to them logical variable as filters (see Variable Properties on page 20 for more information).

2.1.10.4. How to Back Up a Template

If you wish to back up a Survey Data template, you can export the file and store it or generate a duplicate of the template.

Note: We recommend you duplicate your Template to create a back-up copy if you plan to apply a number of changes to your existing Survey Data Template.

2.1.10.5. How to Add Variables to the Template

1. In the Selected Variables list, click **Add** in the toolbar.
A new variable appears in the variable list.

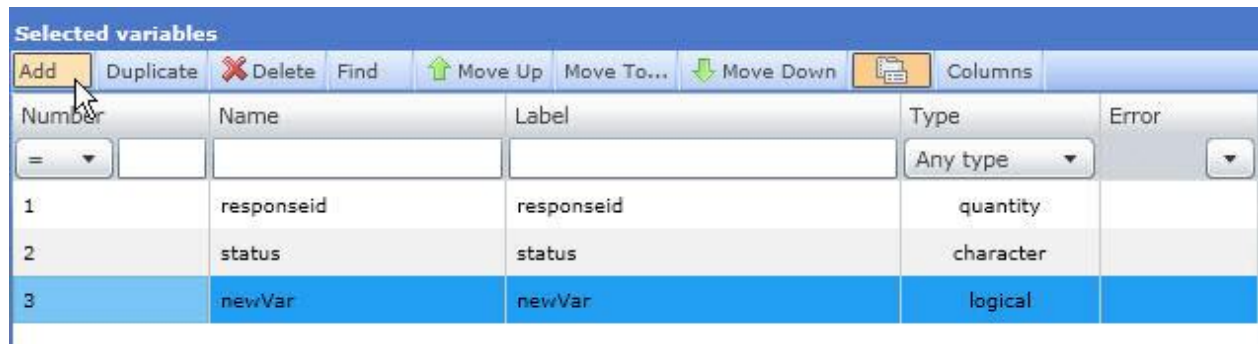


Figure 37 Creating a new variable

The new variable will have default template-specific property values that you can change later (see Variable Properties on page 20 for more information).

2. Click **Save**.

2.1.10.6. How to Import Variables into the Template

Note: This process is **ONLY** required if you want to import variables from a different project (not the one used for generating the template). If you wish to import variables from the same project, use the “Update from project” function.

Imagine the following scenario:

You have generated a template for Project A and would like to use this template for Project B, which differs slightly from Project A. After duplicating the template, you would run the import process. This allows you to import new variables and to replace existing ones if they also exist in Project B.

1. In the Template List, click on the template you wish to import the variable to.
The Template Editor page opens.
2. In the Available Variables toolbar, click **Import**.
A confirmation message appears.
3. Assuming you wish to proceed, confirm the import by clicking **Yes**.
The Webpage Dialog opens.

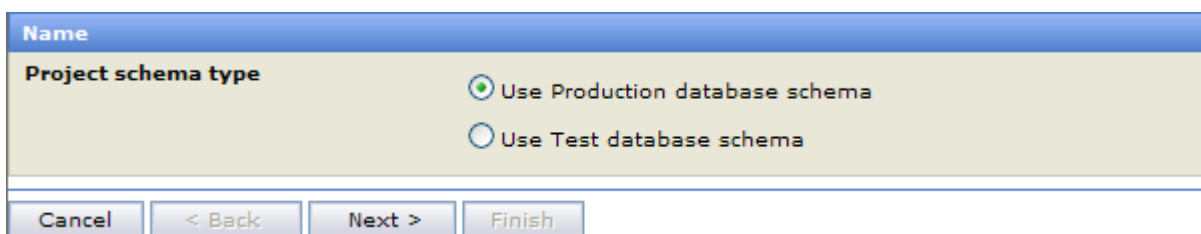


Figure 38 The Webpage Dialog

4. Select the database you wish to use and click **Next**.
The Webpage Dialog changes to show a list of the projects you have access to.
5. Select the project containing the variable you wish to import (the project you are working with), then click **Next**.
The Advanced Template Options window opens. The layout of this window will depend on the type of template you are working with.

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

The Template Generator task is executed. As in this case you are importing variables into a template that already contains some variables, a warning message appears.

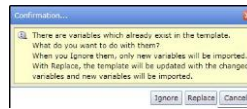


Figure 39 Import warning message

- If you click **Ignore**, only new variables will be imported to the Available Variables list; any variables that already exist in the template will be ignored.
 - If you click **Replace**, new variables will be imported to the Available Variables list AND any variables in the survey that have been changed will be updated in the template.
7. As in this exercise you wish to import the new variable and update one that has been changed, click **Replace**. The Import Variables dialog opens. The variables you are importing are now listed one by one, allowing you to accept or stop each import/change separately. Alternatively, if you are certain your previous selections are correct, you can click **Replace All** to accept all the imports/changes in one go.

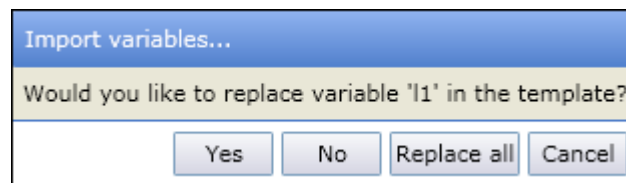


Figure 40 The Import Variables dialog

8. In this case, click **Replace All**.

The new variables (in this case one imported and one changed) are added to the Available Variables list.

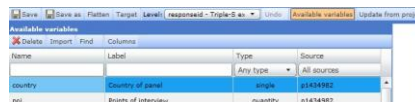


Figure 41 The Available Variables list with the new and updated variables

Note: An Undo button is available, however the import process itself is not reversible. You are recommended to export the template before you import a project so that you have a backup copy of the variables before you make the changes.

The import process is different when the template is flattened. In a flattened template, the **Import** button in the available variable section is not visible unless you are in the Source mode of the template.

- o Click on **Source** (the Source button changes to Target). The template changes to hierarchical view and the import button is now visible in the "Available variables" section.
- o Go through the import process as before.

After the import process the template must be flattened again.

Note: If you want to maintain the column positions, make sure the column positions are fixed (Fix by should be set to Position) before you start the import process. If the column positions are fixed, then re-flattening after the import process will not change the positions.

You now need to ensure that any changed variables are correctly set up, and new variables are added into the template in the desired position(s). Any variables that are incorrectly set up will be displayed in red. To check for these:

2. In the Selected Variables pane on the right, scroll down and look for red variables, or apply a filter.

To apply the filter: In the last Error column, click on the down-arrow and deselect "With no errors".

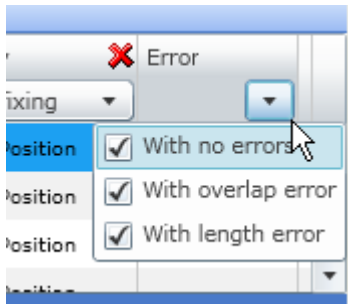


Figure 42 Selecting the error filter

Click in the grid to apply the filter. Only variables that include errors will be listed. The selected variable is presented in dark red.

Selected variables

Number	Name	Label	Type	Start	Finish	Length	Fix by	Error
23	Cartested	Car Tested	multiple	1306	1317	12	Position	This variable h
27	q13	Car Tested	multiple	1430	1438	9	Position	This variable h

Variable 23 'Cartested' of type 'multiple'

Use spread: ☐ Use range: ☐

#	Code	Value
2	2	Fiat
3	3	Renault
4	4	Chrysler
5	5	Cadillac
6	6	new brand in wave2
7	7	Ford

Figure 43 Only those variables containing errors are now listed

3. Toggle the **Show Variable Properties** button (ringed in the figure above) to open the Variable Properties pane towards the bottom of the window. Here you can view the properties (see Variable Properties on page 20 for more information) and see the changes that have been made. In this case, the new category is displayed ("new brand in wave2" - arrowed).

Note: In this case, the reason why the variables are displayed with a red background is that the “Fix By” positions are set to Position. This was originally set to ensure that the columns are maintained even when the project is changed and exported again. To fix this, when generating the template the first time, ensure that there is enough space reserved (using Set Length), or apply Split Multi, change the variable to Spread now (this uses less space), or move the variable to the end.

To change the setting to Spread:

1. Click on first "red" variable to select it.
2. In the Variable Properties window, check **Use spread**.

Two additional fields appear.

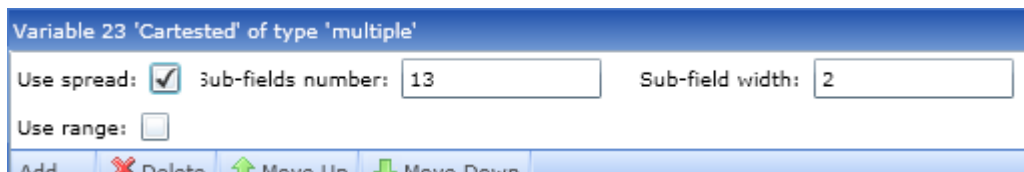


Figure 44 Checking the Use Spread property box

3. In this case, set Sub-fields number to **2** and Sub-field width to **2**.
The red background should change to blue for this variable.
4. Repeat the procedure for the remaining red variables.

To select the variables that have been added to the Available Variables list:

1. In the column between the Available Variables list and the Selected Variables panes, click the **>>** button.
All the variables are added to the template.

Remove the filter from the error column to view the new variables in the Selected Variables pane. In this case, the two new variables (q50,q15_E99) have been added to the bottom of the list. You can now position then as required in the list using the **Move Up** and **Move Down** buttons.

2.1.10.7. How to Fix the Positions of Variables

To fix the positions of all variables in the current flattened template:

1. click the **Fix by** button in the Selected Variables page toolbar, the Fix by... overlay opens.

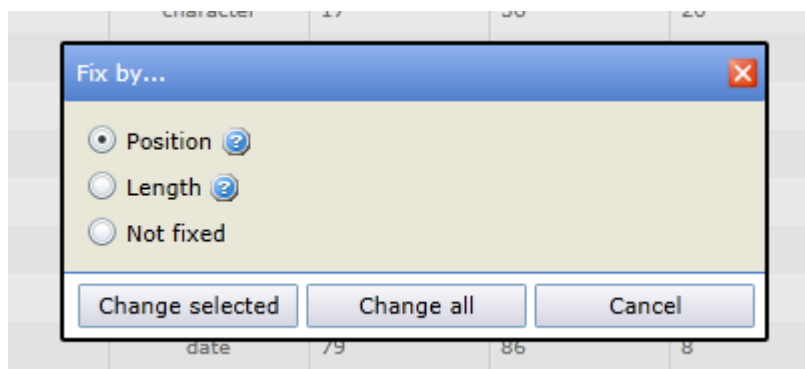


Figure 45 The Fix by... overlay

This overlay allows you to apply the selected parameter to all variables or just those you have already selected. The options are:

- o **Position** - The column positions specified in the Start and Finish columns will be fixed. Use this function to maintain the column positions when updating the Template with the changes in the project running the "Update from project" process, and to maintain the column positions when exporting Survey data.
 - o **Length** - The variable length specified in the Length column will be fixed. Use this function to maintain the variable length when updating the Template with the changes in the project running the "Update from project" process, and to maintain the length when exporting Survey data.
 - o **Not fixed** - changes the selected variables or all variables to **Fix by = None**. This means the variables are not fixed by positions or length.
2. Select **Position**.
 3. Select **Change selected** or **Change all** as appropriate.

Note: In the event of hierarchical Survey Data Templates, these steps must be repeated for each loop level.

2.1.10.8. Changing a Multi Variable

Multi variables can be changed in several ways; you can set the Spread, set the Bitstring, and Split them. To change a multi variable:

1. Click the Change Multi button in the Selected Variables area.

The Change Multi overlay appears.

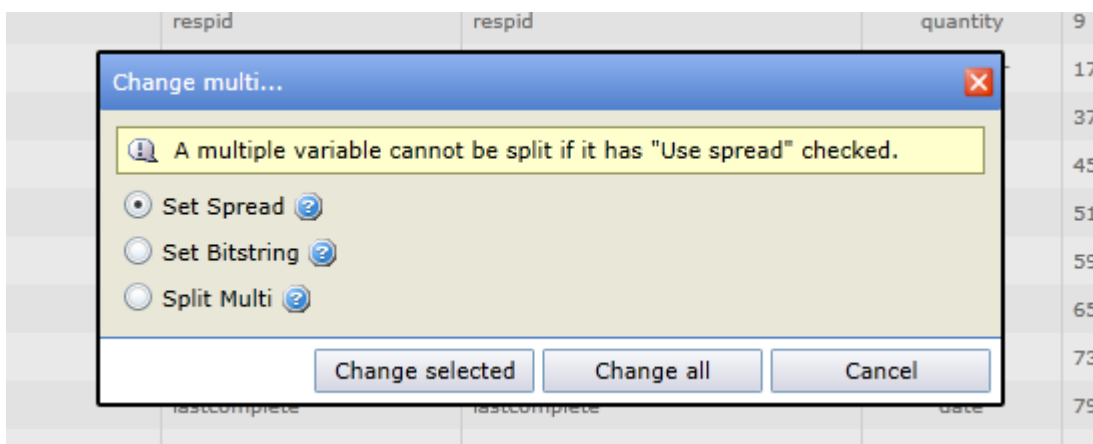


Figure 46 The Change Multi overlay

2. Select the change you wish to perform.

Note that a multi variable cannot be split if it has the Use Spread property checked (see Variable Properties on page 20 for more information).

3. Click **Change selected** to change just the selected multi variable; click **Change all** to change all multi variables.
- **Set Spread** - select if you wish to be able to set a multi variable to the Spread format. In the Spread format the data is recorded as a series of sub-fields, each containing one category value of the multi variable. The data sub-field length is the minimum number of characters required to represent the largest category value in the Values block. Thus variables with category values up to 9 have a data sub-field one character long; variables with category values up to 99 have a data sub-field length of 2, etc. With this storage type it is possible to reduce the field size for multi variables, so it is recommended particularly for variables with long lists of category values (see The Spread Format on page 181 for more information).

- **Set Bitstring** - select if you wish to be able to set a multi variable to the Bitstring format. In the Bitstring format the data is recorded with one character per category of the corresponding variable. A character "1" is used to signify that a category has been selected; a character "0" signifies that a category is not selected. The category value refers to the relative position of the 0/1 code in the data field. Therefore a category value of 9 will always refer to the code in the 9th location of the data field, even if some of the lower category values have not been defined. The data field length is defined by the highest category value. This means that with nine category values, nine fields in the data will be used. Using this storage type, Multi variables with long category lists will require a large data field length (see The Bitstring Format on page 180 for more information).
- **Split Multi** - logical variables are generated from each category of the selected multi variable. For example, a multi question q5 with 3 categories (1, 2, 99) will result in 3 logical variables (q5_1, q5_2, q5_99). These generated logical variables can be positioned in the template by moving them or by allocating specific columns

2.1.10.9. How to Duplicate Variables

This Duplicate functionality can be used to manually add new variables to a template by duplicating existing variables and amending the variable id to match the new variable to be added. Note that the Duplicate functionality was introduced prior to the 'Update From Project' functionality (see How to Update the Template from the Project on page 39 for more information), which now makes this Duplicate functionality obsolete as it is easier for the user to use Update From Project when adding new variables to a template rather than manually duplicating existing variables.

1. In the upper panel of the Template Editor, select from the list the variables you wish to duplicate.
2. Click **Duplicate**.
New copies of the duplicated variables are added to the template's list of variables.
3. Click **Save**.

All values of the duplicate variables except the IDs and names are identical to those of the variables from which the duplicate variables are derived. The name of the duplicate variable consists of the name of the variable from which it is derived, and suffix '_Clone_x' where 'x' is the serial number of the duplicated variable. Duplicated variables are automatically assigned IDs.

Note: The ID property indicates the position of the variable within the Triple-S Template and the variable list. Although the ID is assigned automatically, the range values of the duplicated variables are the same as the range values of the variables from which the duplicate variables are derived. This will cause range overlap problems. To change the range values of variables in respect to their ID and location within the Template, use the Reallocate feature (see Reallocating Variables on page 37 for more information).

ID	Name	Label	Type	Start	Finish	Length	Fix by	Error
1	responseid	Record ID	quantity	1	10	10	None	
2	resp	Respondent id	quantity	11	22	12	Length	
3	responseid_Clone_1	Record ID	quantity	23	32	10	None	
4	resp_Clone_1	Respondent id	quantity	33	40	8	None	

Figure 47 Example of duplicated variables after reallocation

2.1.10.10. How to Assign new Range Values to a Variable

To assign new Range values (Start, Finish and Length - (see Variable Properties on page 20 for more information)) to a variable:

1. In the Template Editor's upper panel, click on the appropriate cell of the variable whose range value(s) you want to change.
2. In the input field of the cell, type the new value.
3. Click **Save**.

2.1.10.11. How to Move Variables within the Template

You can move variables within the Template:

1. In the upper panel, select the variable(s) you want to move.
2. Click **Move Up** to move the selected variable(s) one position up, or click **Move Down** to move the selected variable(s) one position down.

The selected variables will be moved within the list of variables.

You can also move a variable to a specific place in the template:

1. In the upper panel, select the variable(s) you want to move.

ID	Name
1	c10
2	responseid
3	newVar
4	newVar1
5	newVar2
6	brands
7	c10_lev
8	newVar4
9	newVar3

Figure 48 Selecting the variables before moving

2. Click **Move To...**

The Move Variables dialog opens.



A dialog box titled "Move variables..." with a close button (X) in the top right corner. It contains a text field labeled "Move to:" and four buttons at the bottom: "To start", "To end", "Move", and "Cancel".

Figure 49 Specifying the new position

3. Specify the desired position in the **Move To...** field as a positive integer and click **Move**, or click **To start** or **To end** as appropriate.

The selected variable is moved within the list of variables to the specified location. In the event several variables are selected to be moved, the top-most variable selected is moved to the specified position whilst the others are placed consecutively below the first.

ID	Name
1	c10
2	responseid
3	brands
4	c10_lev
5	newVar3
6	newVar
7	newVar1
8	newVar2
9	newVar4

Figure 50 The variables list after moving the variables

4. Click **Save**.

Note: As the ID property indicates the position of a variable within the template and the variable list, moving variables also changes the ID of the variables being moved. However the range values of the variables do not change (see Variable Properties on page 20 for more information). To change the range values of variables with respect to their ID and position within the template, use the Reallocate feature.

2.1.10.12. How to Delete Variables from the Template

You can remove a variable from the template by moving it from the Selected Variables column (right side) to the Available Variables column (left side). Note that if you wish to delete a variable entirely from the template, this can only be done from the Available Variables column.

1. If the variable you wish to delete is currently in the Selected Variables (right) column, select the variable and click the < button to move it to the Available Variables (left) column.
2. In the Available Variables column, select the variable(s) you want to delete.
3. Click **Delete**.
A confirmation dialog opens.
4. Click **OK** to confirm deletion of the variable(s) or click **Cancel** to cancel the operation.
5. Click **Save**.

2.1.10.13. Reallocating Variables

The ranges occupied by different variables should not intersect each other (see Variable Properties on page 20 for more information). When you change a variable's range value such that its range overlaps the range of another variable, the variables' **Errors** cells display a brief error description and a recommended solution, and the entire row of variables is highlighted in red.

To automatically fix problems of this kind, the variable range value Fixing is used. This is performed when you click **Reallocate**, located towards the left end of the toolbar.

The Reallocate function changes the variables' range values such that range overlaps and insufficient range lengths are eliminated, and it also places variables in ascending order with respect to their range values.

The Fixing rule used to change the range values of a variable is defined by the value selected in the **Fix by** cell of the variable list (see Variable Properties on page 20 for more information).

2.1.10.14. How to Show and Hide List Columns

You can decide which columns of information are to be displayed in the Pool and Selected Variables lists, and the order in which those columns are displayed.

1. In the Available Variables list or Selected Variables list as appropriate, click the **Columns** button.

The Customize View dialog opens.

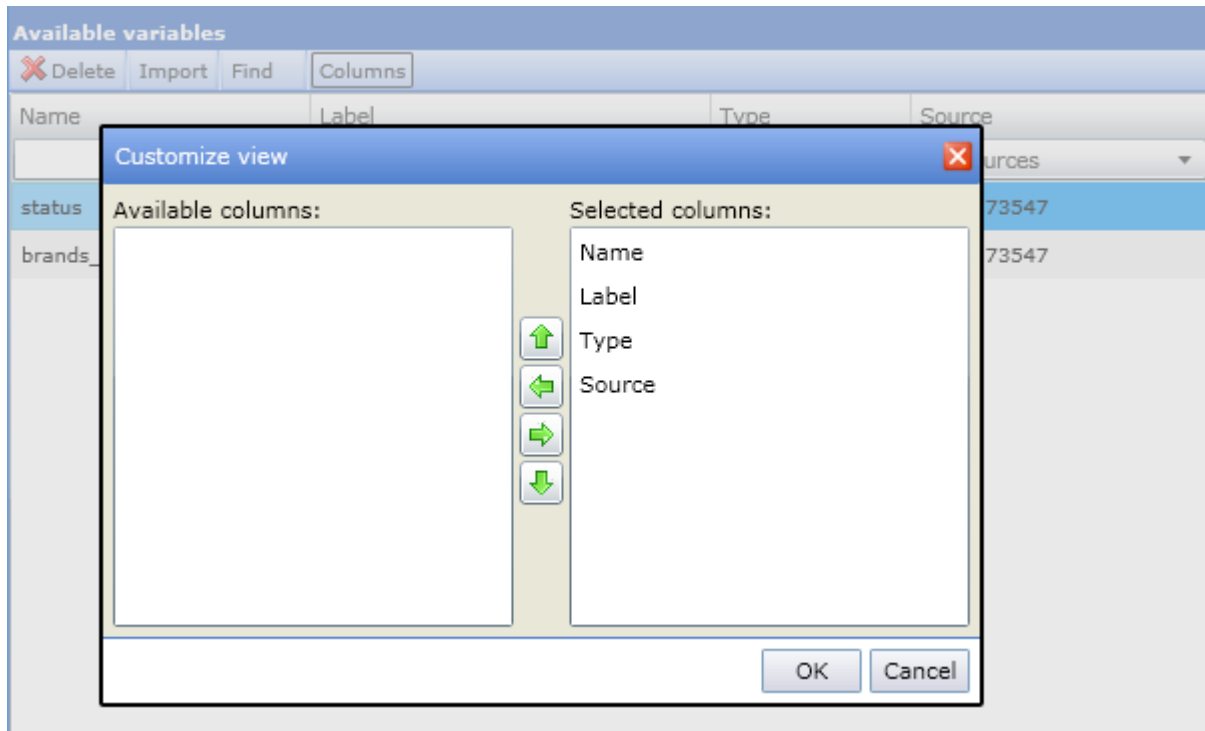


Figure 51 Example of the Customize... View dialog

The columns are displayed in the order in which they appear in the Selected Columns list (compare the list to the columns in the shaded background window).

- o To show a column, select it in the Available list and click the  button.
- o To hide a column, select it in the Selected list and click the  button.
- o To move a column towards the left in the list, select it in the Selected list and click the  button.
- o To move a column towards the right in the list, select it in the Selected list and click the  button.

2. When you have the desired columns in the correct places, click **OK** to close the dialog.

2.1.10.15. How to Flatten a Template

A survey template that includes loops can be simplified such that the loops are converted to a number of 'standard' variables. During this flattening process, loop data will be expanded, and variables will be created to represent each iteration of each question. If you do not need to include specific loop iterations or questions in the flattening process, use the Template editor to remove those that are not required.

Important

In complex surveys with large numbers of loops, iterations or loop questions, you are strongly recommended to edit the template to simplify it as much as possible before conducting a flattening operation. A huge number of variables can be generated during the flattening process, which may exceed Confirmit's Acceptable Use Policies.

Note: When a template is flattened, the loop variables will be positioned as they appear in the questionnaire.

To flatten a template:

1. In the Template Editor window's toolbar, click **Flatten**.

A Task page opens. This shows the progress of the operation, and on completion the page closes automatically. Note that the **Flatten** button has now been replaced by the **Source** button - click this to view the source template.

Note: Positions should always be fixed after the template has been flattened.

2.1.10.16. How to Update the Template from the Project

Imagine the following scenario:

In the first instance, Project A was generated, data was collected, a template was generated and the data was exported. In the second instance, Project A was changed (one question and one category were added), but we want to use the same template as before so the positions of the variables can be maintained.

The Update from Project functionality allows you to easily update the template with any changes that have been made in the project since the template was created or last updated. This function is activated by the **Update from Project** button in the template editor.

Note: If you wish to retain the column positions of existing variables then you must set all variables to **Fix By Position** before updating the template (see **How to Fix the Positions of Variables** on page 33 for more information).

To update the template:

1. In the Template Editor page, click the **Update from Project** button.

Note: If the template was generated using more than one project, then a project selection page now opens. In this case, select the project you wish to update the template from and click **Next**.

Note: If the template was generated before the Confirmit 15 SP1 release, then the procedure is similar to that used for creating a new template (see **How to Create a New Template** on page 6 for more information). In this case make the appropriate selections and click **Next/Finish**.

The Template Generator task runs. On completion, a page opens in which any differences between the template and the project are listed.

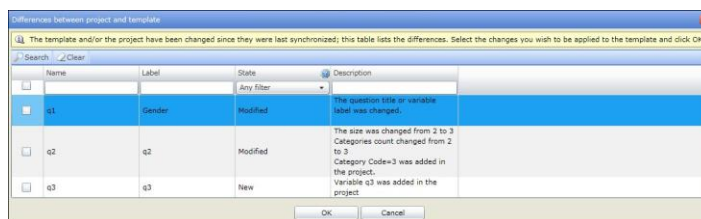


Figure 52 Example of a "Differences..." page

Note: In the event there are no differences between the template and the project, a message will inform you of this fact.

You can now select which of the changes you wish to copy to the template.

2. Click in the check-box at the left end of a row to select that change, or click in the top box to select all the changes, then click **OK**.

The changes are copied to the template.

2.1.11. Mapping Confirmit Variables

The table below outlines how Confirmit variable types are mapped to Triple-S variable types.

System fields	
respid,responseid	quantity
rowguid	character
status	character
dates (interview_start, interview_end, last_touched, lastcomplete)	Will be split into pairs of date + time variables, e.g. interview_start (for date) and interview_start_time (for time).
Question types	
single	single
multi	multiple
open text	character
open text numeric	quantity
grid	Will be split into a set of single variables, one for each element in the answer list.
loop	(In 2.0 hierarchy export) single
multi open text	Will be split into a set of character variables, one for each element in the answer list.
multi numeric	Will be split into a set of quantity variables, one for each element in the answer list
multi ranking	Will be split into a set of quantity variables, one for each element in the answer list
other, specify fields	character

2.2. Current Rule

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

The Current Rule page shows the details of the rule selected in the Rule List (see Rule List on page 84 for more information). When you select a rule in the Rule List, the Current Rule page opens at the General tab.

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

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

2.2.1. The General Tab

The **Current Rule > General** tab shows the details of the currently selected rule. Here you can change the rule's name, write in a comment and specify the source and target types, Status and Validation setting. The remaining information cannot be edited.

Figure 53 Example of the Current Rule > General tab

The properties and fields are as follows:

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

Note: If Source Type is set to Survey Data and the Target Type is set to Delimited Text File, or vice versa, then in the event the user has the necessary permissions, they can execute the rule as a different user. The Execute as Other User field is then available below the Created By information (see Executing Rules as Other User on page 43 for more information).

Important

If you select "Confirmit Survey Data", and "Columns" or "Survey Data Template" in the Columns options, in both the Source and Target tabs, then Validation Setting options will become available on the Source tab (see Validation Rules on page 179 for more information).

2.2.1.1. How to Duplicate a Rule

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

1. In the Rule List, click on the rule you wish to duplicate, to select it.

The Rule Details page opens.

2. Click **Duplicate**.

The Duplicate Panel Rule dialog opens.

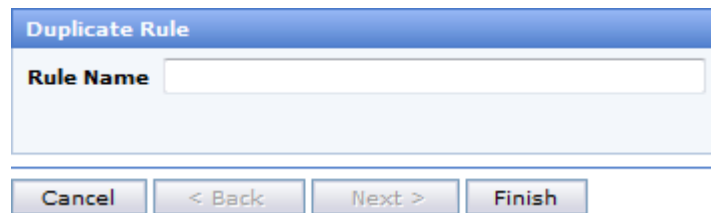


Figure 54 The Duplicate Rule dialog

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

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

2.2.1.2. How to Execute a Rule

Run the rule to perform the specified changes etc.

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

The Rule Execution Properties dialog opens.

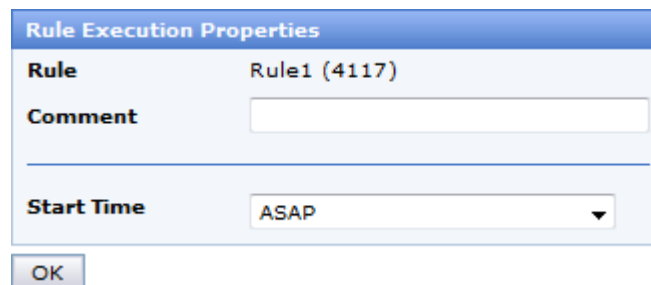


Figure 55 The Rule Execution Properties dialog

2. Type any comments into the Comment field.
3. In the Start Time field, select when you want the task to be run.

Select ASAP to run the job as soon as it gets to the front of the task queue in the server. Select Schedule for Later Execution if you want the job to be run at a specific time in the future or if you want the job to be repeated at regular intervals.

4. Click **OK**.

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

If you have specified that the task is to be scheduled for later execution, then a Recurrence Pattern dialog opens. Refer to the Authoring User Guide for more information on recurrence patterns.

On completion, the text Task Completed is displayed at the bottom of the sequence list.

5. Click **OK** to close the Task page and return to the Rule Details page.

2.2.1.3. Validating an Action Script

Click to check the script for compilation errors. If errors are found, they will be listed in a separate window. You must then correct the errors and validate again. If no errors are found, a message is given.

Click the red X button in the upper-right corner of the window to close the window and return to the Rule Details page.

2.2.1.4. How to Export a Rule

You can export rules to other servers. Proceed as follows:

1. In the Rule Details page, save the rule to ensure all changes/updates are included.
2. Click **Export Rule**.

The Export Rule dialog opens.

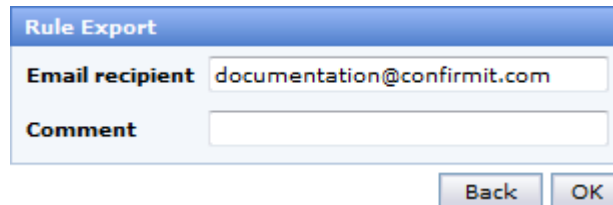


Figure 56 The Rule Export dialog

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

An email is sent to the specified address with the rule attached. This rule can now be imported into the destination server (see How to Import a Rule on page 85 for more information).

2.2.1.5. Executing Rules as Other User

In the event you have the necessary permissions, you can execute several of the import, export and data processing rules as "Other user". This enables you to select another user from the selected survey's company, and execute the rule with that selected user's settings, for example pgp encryption, file transfer type, email, etc.

The option will be available to a user only if he/she has the permissions: **system_account_read** and **system_project_data_export_admin**. Refer to the Confirmit Administrator Guide for further details.

In Data Processing, the option appears at the bottom of the Current Rule > General tab if the Source Type is set to Survey Data and the Target Type is set to Delimited Text File, or vice versa.

The screenshot displays the 'General' tab of a rule configuration interface. At the top, there is a navigation bar with buttons: Back, Save, Duplicate, Execute, Validate Action Script, and Export Rule. Below this, the 'General' tab is selected, showing fields for Rule ID (2163), Rule Name (DocTest), and a large text area for Comment. Further down, Source Type is set to 'Delimited Text File' and Target Type is 'Survey Database'. The Status is 'Enabled' with radio buttons. The Created Date is '13.09.2011 11:43:43' and Created By is 'nigelb'. At the bottom, the 'Execute as other user' section includes a text input field, a 'Select user...' button, and a 'Clear user' button.

Figure 57 The Current Rule > General tab showing the Execute as other user option

Click **Select User** to open a Select User overlay in which you can search for and select the user you wish to use. Click **OK** to add the selected user's user name to the field, then continue with the procedure.

The Execute as other user feature is available for the following rules:

- Survey Data Export
- Survey Data Import
- Survey Respondents Export
- Survey Respondents Upload
- Data Processing rules:
 - o from SurveyData to File
 - o from File to SurveyData

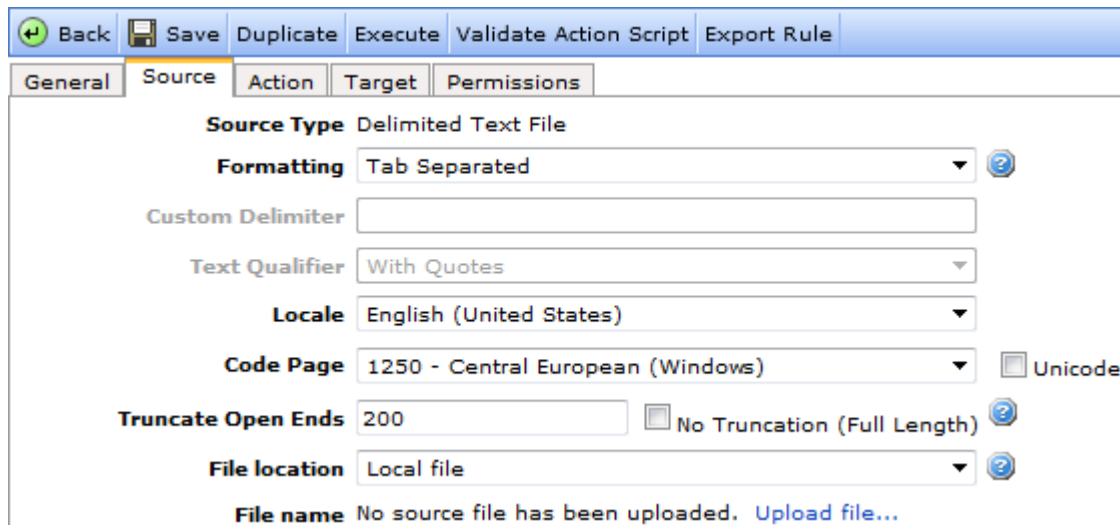
Note that the project must be selected before you can select the "other user".

2.2.2. The Source Tab

Use the fields on this tab to specify the data source on which the rule is to operate. The data to be moved or changed can come from a number of sources – select the Source Type on the General tab (see The General Tab on page 41 for more information). The screen layout for the Source tab then depends on the Source Type selected.

2.2.2.1. Source Type > Delimited Text File

Select this option if the data source is a delimited text file. Note that the file can be .txt or .csv. The Source tab layout is then as shown below.



Back Save Duplicate Execute Validate Action Script Export Rule

General Source Action Target Permissions

Source Type Delimited Text File

Formatting Tab Separated

Custom Delimiter

Text Qualifier With Quotes

Locale English (United States)

Code Page 1250 - Central European (Windows) ☐ Unicode

Truncate Open Ends 200 ☐ No Truncation (Full Length)

File location Local file

File name No source file has been uploaded. [Upload file...](#)

Figure 58 The Source tab with File selected as the Source Type

The properties are as follows:

- **Formatting** – Select Comma-Separated, Tab-Separated or Custom as required.
- **Custom Delimiter** - if you have selected Formatting to be Custom, this field becomes active. Type in the character you wish to use as the delimiter.
- **Text Qualifier** - this property is available when you select Formatting as Comma separated or Custom. In these conditions, the separating character has a special meaning; it is used to separate the different values from the different variables. However some texts to be exported may include punctuation. Specifying quotes around texts ensures that any punctuation does not corrupt the file layout.
- **Locale** – specify the area or country in which the data in the file is to be used. This will allow the system to format fields such as date fields according to local standards.

Note: On a later import of the file, the Locale setting made on the Target tab (see Target Type > Delimited Text File or Delimited Text File (Answer Codes as Labels) on page 55 for more information) must match the setting made here.

- **Code Page** – select the code used in the file.
- **Unicode** – check this box if the file is saved as Unicode. The Code Page property is then disabled.
- **Truncate Open Ends** - when exporting data to File, system performance is heavily affected by the number of “unlimited width” text fields in the exports (i.e. Open Text fields with no field width settings). Open Text fields can be truncated by using this setting (default is 200 characters). Confirmit strongly recommends truncating Open Text field widths with this setting rather than choosing “Full length”, as this will lead to significant improvements in processing time.
- **File location** - select the source of the file. Import files can be uploaded directly in the browser, placed on a Confirmit FTP server and retrieved from there, or imported from an external FTP server.
 - o **Local file** - if you wish to upload the source file from your server network (perhaps the file has been stored there after having been sent to you via email), then select this option, click the **Upload File** link in the line below, then click **Browse**. A standard browser window opens, in which you can search for and select the file you wish to upload.
 - o **FTP** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then fetch the source file from Confirmit's FTP location. Type in the file name. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed.

Note: Confirmit FTP imports support the use of wildcards in the file name. * gives zero or more characters, ? gives exactly zero or one character. For example, myFile?_*.txt - will match myFile1_20082012.txt and myFile2_22082012.txt.

- o **External FTP** - files can be taken from an external FTP location. In this case the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct.

Note: Wildcards are not supported when using External FTP.

- If you select one of the FTP options, then you can also decide what to do with the original files on the FTP site; leave them there or delete them. Note that fetching from FTP can allow automation of data flows, since you can set up the system to pick up files automatically.
- In the event the file is uploaded from an FTP site, you can select where the error files are to be sent in the event a problem is encountered with the rule. Select between sending the files by email and sending them to the FTP site from which the files as uploaded. In this case the file will include the task ID so the reader will be able to trace the task that failed.

Note: If a Delimited Text File is uploaded which contains more column headers in a specific record than there are header columns, an error message will be displayed.

- **Encrypted File** - if your company has licensed the Encryption add-on and it has been enabled , the data transfer encryption functionality makes it possible to perform secure data transfers in Confirmit. If the source file has been encrypted by the sender using your PGP public key, you will need to decrypt the files using your private key. Note that an administrator setting makes it possible to force every Confirmit user within a company to use encryption and FTP server during data transfer.

1. Make the required selections and save them.
2. Select the **Local File** or **FTP** option as appropriate.
3. Depending on which option you have selected, click the **Upload File** link or type the required information into the fields.

If you have clicked **Upload File**, a standard Windows File Upload dialog opens.

4. In which case, browse to and select the file to be uploaded (ensure it is of the correct type as selected in Formatting above).

The name of the selected file is displayed alongside the **Uploaded File** button.

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

2.2.2.2. Source Type > Excel File

Select this option if the data source is an Excel file. The Source tab layout is then as shown below.

The screenshot shows the 'Source' tab of a configuration window. At the top, there is a toolbar with buttons: Back, Save, Duplicate, Execute, Validate Action Script, and Export Rule. Below the toolbar, there are tabs: General, Source (selected), Action, Target, and Permissions. The 'Source' tab contains the following fields:

- Source Type:** Excel File
- Excel Version:** Microsoft Excel 97-2003 (.xls)
- Locale:** English (United Kingdom)
- Sort Data:** ☐ ?
- File location:** Local file
- File name:** No source file has been uploaded. Upload file...

Figure 59 The Source tab with Excel selected as the Source Type

The properties and options are as follows:

- **Excel version** - the system supports .xls (default) and .xlsx formats. Select the appropriate type from the drop-down.
- **Locale** – specify the area or country in which the data in the file is to be used. This will allow the system to format fields such as date fields according to local standards.
- **Sort Data** - In Excel import, the data in all sheets must be sorted by key columns. If the data in your import file is not sorted, check this box to instruct the task execution to sort the data in all the Excel sheets automatically. Note that with a large database, sorting may take some time.
- **File location** - select the source of the file. Import files can be uploaded directly in the browser, placed on a Confirmit FTP server and retrieved from there, or imported from an external FTP server.
 - o **Local file** - if you wish to upload the source file from your server network (perhaps the file has been stored there after having been sent to you via email), then select this option, click the **Upload File** link, then click **Browse**. A standard browser window opens, in which you can search for and select the file you wish to upload.
 - o **FTP** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then fetch the source file from Confirmit's FTP location. Type in the file name. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed.

Note: Confirmit FTP imports support the use of wildcards in the file name. * gives zero or more characters, ? gives exactly zero or one character. For example, myFile?_*.txt - will match myFile1_20082012.txt and myFile2_22082012.txt.

- o **External FTP** - files can be taken from an external FTP location. In this case the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct.

Note: Wildcards are not supported when using External FTP.

- If you select one of the FTP options, then you can also decide what to do with the original files on the FTP site; leave them there or delete them. Note that fetching from FTP can allow automation of data flows, since you can set up the system to pick up files automatically.
- **Encrypted File** - if your company has licensed the Encryption add-on and it has been enabled, the data transfer encryption functionality makes it possible to perform secure data transfers in Confirmit. If the source file has been encrypted by the sender using your PGP public key, you will need to decrypt the files using your private key. Note that an administrator setting makes it possible to force every Confirmit user within a company to use encryption and FTP server during data transfer.

1. Make the required selections and save them.
2. Select the **Uploaded File** or **Pick up from FTP Location** radio button as appropriate.
3. Depending on which button you have selected, click the **Upload File** link or type the file name into the FTP field.

If you have clicked **Local File**, a standard Windows File Upload dialog opens.

4. In which case, browse to and select the file to be uploaded.
The name of the selected file is displayed alongside the **Uploaded File** button.
5. Click **Save** to save the changes.

2.2.2.3. Source Type > Respondent Data

Select this option if the data source is a Respondent Data File. If the target is Survey Database (for the same or a different survey), information from the Respondent table will be copied into the background variables in the Response table. The Source tab layout is then as shown below.

The screenshot shows the 'Source' tab of the Confirmit Horizons 23 Data Processing User Guide. The 'Source Type' is set to 'Respondent Data'. The 'Project IDs' field contains the text 'p0959291,p1776476' and is accompanied by a 'Select projects' button. The 'Keyword Filter' is currently empty. Below these fields is the 'Data Filter' section, which includes an 'Expression' field with an 'Edit...' button, a 'Date Filter' section with 'Start Date' and 'End Date' fields and calendar icons, a 'Relative Date Filter' section, and a 'Data to be included' dropdown menu set to 'All Data' with a note '(Only applies to recurring tasks)'. A yellow warning box with an exclamation mark icon states 'Please select the variables which should be processed.' Below this is the 'Variables' field, which is empty, and a 'Select variables...' button.

Figure 60 The Source tab with Respondent Data selected as the Source Type

- **Project IDs** – you can select a project either by its Project ID or by keywords. To use Project IDs, click the radio button, click **Projects**, and select the required project(s) from the list (note that you can select more than one). The Project IDs are separated by a comma. When the rule is executed, a result file will be generated for each project that is selected.
- **Keyword Filter** - click the radio button and type in the required keyword. The filter will then match any survey that is assigned the particular category or keyword in the Project Overview page . Refer to the Authoring User Guide for more information. When the rule is executed, a result file will be generated for each project that is selected.
- **Expression** - here you can create an expression to filter the data that is to be manipulated by the rule. Click **Edit** to open the Expression Editor window (see The Expression Editor Window on page 100 for more information).

Note: When exporting data from CATI surveys, CATI Extended Status can be used as a filter. Use an expression such as "CatiExtendedStatus=13".

- **Date Filter** - if you wish to include only data from between particular dates, check the box to activate the date filter, then specify the start and end dates for the data to be used by the rule. The date filter is based on the value stored in the CreatedDate field.
- **Relative Date Filter** - allows you to use data from different time intervals relative to the scheduled export time.
- **Data to be included** - in the event the rule is recurring, you can instruct the rule to process all the data specified by the filters above, or only the data that has changed since the previous time the rule was run. The changes will be based on the value stored in the LastUpdated field.

- **Variables** - select the variables you wish to use.
 - o If the source and the target are Respondent Data then the following rules apply: If no variables are specifically selected, all variables will be selected by default. When the selected variable does not exist in the Respondent database, it will be generated (as type "nvarchar").
 - o If the source is Respondent Data and the target is Survey Database, the following rules apply: Variables must be selected; if no variables are selected then the rule execution will fail. The selected variables must exist in the target survey database.

2.2.2.4. Source Type > Survey Database

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

Note: Export to Quantum, SAS or SPSS (SAV) file is only allowed from a Confirmit Survey Database.

Figure 61 The Source tab with Confirmit Survey Data selected as the Source Type

The properties and options are as follows:

- **Project IDs** – you can select a project either by its Project ID or by keywords. To use Project IDs, click the radio button, click **Projects**, and select the required project(s) from the list (note that you can select more than one). The Project IDs are separated by a comma. When the rule is executed, a result file will be generated for each project that is selected.

Note: When Delete Data is selected as Execution mode on the Target tab (see Target Type > Survey Database on page 66 for more information), only one project can be selected as the source.

- **Keyword Filter** - click the radio button and type in the required keyword. The filter will then match any survey that is assigned the particular category or keyword in the Project Overview page . Refer to the Authoring User Guide for more information. When the rule is executed, a result file will be generated for each project that is selected.

Note: When multiple projects are selected, if ...File is selected as the target, for most data types this will produce a single file combining the data from all the selected surveys. However for Excel (xlsx) and SPSS (sav) files the data is exported to separate files for each project.

- **Use Test Database** - check if you wish to test the rule using data from the Test database.
- **Complete responses** – selects only data from surveys with the status Complete.
- **Incomplete responses** – selects only data from surveys with the status Incomplete.
- **Screened** – selects only data from surveys with the status Screened.
- **Quota full** - selects only data from surveys with the status Quota Full.
- **Error** - selects only data from surveys with the status Error.
- **Expression** - here you can create an expression to filter the data that is to be manipulated by the rule. Click **Edit** to open the Expression Editor window (see The Expression Editor Window on page 100 for more information).
- **Date Filter** - if you wish to include only data from between particular dates, select the dates here.
- **Relative Date Filter** - allows you to export data from different time intervals relative to the scheduled export time.
- **Data to be included** - select All Data, which updates all data, or Data Changed Since Last Run, which includes only the data that has been changed since the previous update (see Survey Source on page 178 for more information). Note that this setting only applies to recurring tasks (non-recurring tasks will include all data subject to the data filters on the Source tab). Note also that if an Update Rule references the same source/target surveys then this setting will have no effect since during the previous execution the rule will have updated the "last touched" column in the target survey so the next execution will deem the data to have changed.
- **Columns** - if the selected target is anything other than Triple-S File, then you can select the columns you wish to include; all columns, selected, or as used in the selected template. If Survey Data Template is selected, then you can select whether the label texts are to be taken from the template or the survey. Click the **Select Template** button to open an overlay in which you can select the template you wish to use.

Note: The Columns settings will not be available if the target is set to "Triple-S file" because then the Triple-S template on the target will control which columns are to be included.

- **Validation Settings** - if the Target Type selected is Triple-S Data File (see Target Type > Triple-S XML (Standard or Extended) on page 70 for more information), the Validation Setting options will be available. Check the boxes as required (see Validation Rules on page 179 for more information).
- **Selected language** - in the event the survey is multi-lingual, select the survey language version to be exported.
- **Text in Question Labels** - select the text you wish to be included as the question labels. The options are the question ID, only the title, only the question text, or both the question title and text.
- **Text in Answer Element Labels** - allows you to specify whether the Answer element of a Multi / Grid / Open Text List / Numeric List Question is to be positioned in front of the Question label, after the Question label or without the Question label when exporting survey data or when generating a Survey Data Template which can be used for a survey data export. The content of the Question label depends on the Text in Question Labels setting, which allows you to specify whether you want the Question ID, Question text, Question title or Question text and Title exported. Select the text you wish to be included as the answer labels. The options are:
 - o **Answer (Question Label)** - the question label is placed after the answer element.
 - o **Question Label (Answer)** - the answer element is placed after the question label.
 - o **Answer** - only the answer element.

Note: The Text in Answer Element Labels property will be grayed out if the Text in Question Labels property is set to Question ID.

2.2.2.4.1. The Relative Date Filter

The Relative date filter allows you to export data from different time intervals relative to the scheduled export time. This is useful when data exports are run as recurring tasks.

For example. If a task is set to run every Monday at 00:01, and you want to export data from the last month, you can set up the export task with these "relative" settings:

- **Interval start:**
 - o Months = 1.
 - o Days = (not specified).
 - o Hours = (not specified).
 - o Minutes = (not specified).
- **Interval end:**
 - o Months = (not specified).
 - o Days = (not specified).
 - o Hours = (not specified).
 - o Minutes = (not specified).

A more complex example could be:

Let us assume that a data export has been scheduled to run at a specific time N, and the user wants to receive data for an interval:

- Start = N - (2 months + 3 days)
- End = N - (1 month + 5 hours + 30 minutes)

The interval length will be as follows:

$(2 \text{ months} + 3 \text{ days}) - (1 \text{ month} + 5 \text{ hours} + 30 \text{ minutes}) = (1 \text{ month} + 2 \text{ days} + 18 \text{ hours} + 30 \text{ minutes}).$

To perform a data export for the above-mentioned interval, enter the following specifications in export properties:

- **Interval start:**
 - o Months = 2.
 - o Days = 3.
 - o Hours = (not specified).
 - o Minutes = (not specified).
- **Interval end:**
 - o Months = 1.
 - o Days = (not specified).
 - o Hours = 5.
 - o Minutes = 30.

Note: When the source is a survey database the Relative Date filter is based on Interview Start, while for a Respondent database it is based on the system variable CreatedDate.

2.2.2.5. Source Type > Triple-S Data

Select this option if the data source is to be Triple-S data (see What is Triple-S? on page 2 for more information). The Source tab layout is then as shown below:

Figure 62 The Source tab with Triple-S Data selected as the Source Type

The options and properties are as follows:

- **Survey data template** - if desired, check the box then select the appropriate template from the Template List. If you do not select this option, then the schema definition (XML) must be included in the uploaded zip file.
- **File location** - select the source of the file. Import files can be uploaded directly in the browser, placed on a Confirmit FTP server and retrieved from there, or imported from an external FTP server.
 - o **Upload file** - if you wish to upload the source file from your server network (perhaps the file has been stored there after having been sent to you via email), then select this option, click the **Upload File** link, then and click **Browse**. A standard browser window opens, in which you can search for and select the file you wish to upload.
 - o **FTP** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then fetch the source file from Confirmit's FTP location. Type in the file name. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed.

Note: Confirmit FTP imports support the use of wildcards in the file name. * gives zero or more characters, ? gives exactly zero or one character. For example, myFile?_*.txt - will match myFile1_20082012.txt and myFile2_22082012.txt.

- o **External FTP** - files can be taken from an external FTP location. In this case the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct.

Note: Wildcards are not supported when using External FTP.

- If you select one of the FTP options, then you can also decide what to do with the original files on the FTP site; leave them there or delete them. Note that fetching from FTP can allow automation of data flows, since you can set up the system to pick up files automatically.
- **Encrypted File** - if your company has licensed the Encryption add-on and it has been enabled, the data transfer encryption functionality makes it possible to perform secure data transfers in Confirmit. If the source file has been encrypted by the sender using your PGP public key, you will need to decrypt the files using your private key. Note that an administrator setting makes it possible to force every Confirmit user within a company to use encryption and FTP server during data transfer.
- **Character encoding for data file** - select ANSI or Unicode as appropriate.

2.2.3. The Action Tab

Use the Action tab to input scripting code to specify actions that are to be performed on the data.

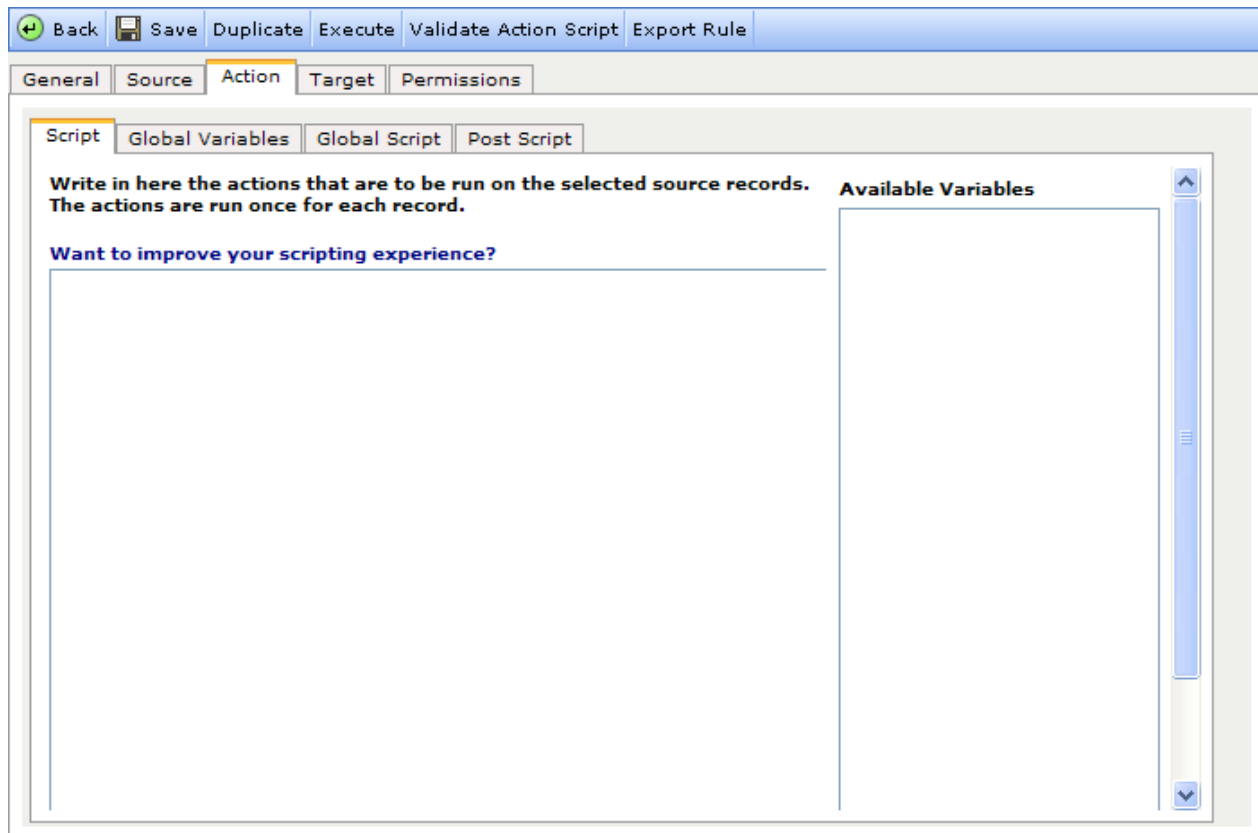


Figure 63 Example of the Action tab

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

Fields selected in the Source tab (see The Source Tab on page 44 for more information) are listed in the Available Variables column. These fields are available as Strongly Typed Properties in the script code.

If you wish to change data, write the required action into the field on the appropriate tab. The tabs are as follows:

- **Script** – write in here the actions that are to be run on the selected source records. The actions are run once for each record.
- **Global Variables** – you can define script properties that will be available to all records. They must then be defined here.
- **Global Script** – actions written here are run once at the beginning of the process. A typical example would be if you want to execute a Customer Code library before running the actual Data Processing script. In this case you could write for example:

```
GlobalScript:
zipCode2CityMap = MyCustomCodeLib.GetZipCode2CityMapping();
```

- **Post Script** - actions written here are performed once, after all other actions have been performed.

Note: Respondents who close the survey before completing will have their status set to "null" in the database. If you want to update respondents with the status "Incomplete", ensure "Incomplete" or "All" are selected under "Source" and use the action script:
If(status == null) { //update respondents with status incomplete}

Further information on scripting in Data Processing is given in the Scripting Language chapter (see Data Processing Scripting on page 102 for more information).

Note: The Syntax Highlighter functionality automatically color-codes key words, and provides lists of selectable options under specific conditions while scripting. (refer to the Authoring User Guide for more information). The Syntax Highlighter functionality is on by default for a survey, but you can switch it off in the User Settings.

2.2.4. The Target Tab

Use the Target tab to select the target for the data defined in the Source tab (see The Source Tab on page 44 for more information). The fields available on the Target tab depend on the Target Type that you select in the General tab (see The General Tab on page 41 for more information).

2.2.4.1. Target Type > Delimited Text File or Delimited Text File (Answer Codes as Labels)

Note: Some of the options are only available when the project includes loops.

The screenshot shows the 'Target' tab in the Confirmit Horizons 23 Data Processing User Guide. The tab is titled 'Target' and shows settings for 'Delimited Text File'. The settings include:

- Target Type:** Delimited Text File
- Loop Handling:** Separate Files
- Position of Loop Variables:** As in questionnaire
- Formatting:** Tab Separated
- Custom Delimiter:** (empty)
- Text Qualifier:** With Quotes
- Locale:** English (United States)
- Truncate Open Ends:** 200
- Open End Handling:** Include Open Ends
- File Encoding:** Unicode
- Encrypt File:** (unchecked)
- Email Address:** documentation@confirmit.com
- File Transfer:** Email
- Override Email Options:** (unchecked)
- Override Filename:** (unchecked)

Figure 64 The Target tab when Delimited Text File is selected

When Target Type is set to **Delimited Text File** or **Delimited Text File (Answer Codes as Labels)**, the properties and options available on the tab are as follows:

- **Loop Handling** - this option is only available if the project included loops. Here you specify how loops are to be handled for the export. The options are:
 - o **Separate files** - the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the code of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical project without having to generate a flattened template.

- o **Single file** - Instead of exporting loop data as separate files, you can export all data belonging to a project in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.
- **Position of Loop Variables** - only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:
 - o **Appended at end** - the loop variables are appended at the end of the template.
 - o **As in Questionnaire** - the loop variables are positioned as the corresponding loop was placed in the questionnaire.
- **Formatting** – Select comma-separated, tab-separated or Custom as required.
- **Custom Delimiter** - if you have selected Formatting to be Custom, this field becomes active. Type in the character you wish to use as the delimiter.
- **Text Qualifier** - this property is available when you select Formatting as Comma separated or Custom. In these conditions, the separating character has a special meaning; it is used to separate the different values from the different variables. However some texts to be exported may include punctuation. Specifying quotes around texts ensures that any punctuation does not corrupt the file layout.
- **Quoted Values** - in some cases when exporting to Delimited Text File, commas will be removed from the answers to Open Text questions during the export. Check this box to ensure the commas are retained in the answers.
- **Locale** – specify the area or country in which the data in the file is to be used. This will allow the system to format fields such as date fields according to local standards.

Note: The Locale setting here must match the setting made on the Source tab (see Source Type > Delimited Text File on page 44 for more information).

- **Truncate Open Ends** - for Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **Open End Handling** - defines how open ended questions are handled. The options are:
 - o **Include Open Ends** - all open end questions are included in the export.
 - o **Exclude Open Ends** - no open end questions are included in the export.
 - o **Open Ends Only (one row per respondent)** - only open end questions are included in the export file, with one row in the file for each respondent (all the answers for each respondent are in the same row).
 - o **Open Ends Only (one row per answer)** - only open end questions are included in the export file, with one row in the file for each answer given.
- **File Encoding** - in the File Encoding drop-down menu, choose the encoding method to be used. Click more... to expand the list.
- **Encrypt File** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys. Note that your company must license the Data Transfer Encryption add-on for this option to be available.
- **Email Address** – when Email is selected in File Transfer, this is the email address to which the file is to be sent. Default is the current user's (yours).
- **File Transfer** - export files can either be sent by email or placed on a Confirmit or External FTP server. FTP may be a good option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. In the event External FTP is selected, the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct. Note that your company must license the FTP add-on for the FTP options to be available (refer to the Authoring User Guide for more information).

- **Override Email Options** - when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.
- **Override Filename** - allows you to override the system-generated file name. Tick this check-box to open the file name text-box. Here you can edit the system-generated name. Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example “..\myftpfile_in_another_folder.txt”. In this case the file will not be stored in the default folder (“ProjectsData\p123123” or “RulesData\RuleN”), but rather directly under the (Company) Download folder.

Note: The Filename template must contain the '^PROJECTID^' part of the name as this will be replaced by the real project id during rule execution. Default is ^PROJECTID^_ ^USERID^_ ^TASKID^.

2.2.4.2. Target Type > Excel File or Excel File (Answer Codes as Labels)

The Target Type = Excel File export enables you to export the data as an Excel file, while the Excel File (Answer Codes as Labels) export gives you the additional option of including the answer codes as labels with the export. This export gives an additional export property that, in the event the survey is multilingual, allows you to select the language to be used.

Note: When Source is Survey Data and multiple projects are selected, for xlsx files the data is exported to separate files for each project.

Note: Some of the options are only available when the project includes loops.

The screenshot shows the 'Target' tab of a configuration window. At the top, there is a toolbar with buttons: Back, Save, Duplicate, Execute, Validate Action Script, and Export Rule. Below the toolbar are tabs: General, Source, Action, Target (selected), and Permissions. The 'Target Type' is set to 'Excel File'. The 'Excel Version' dropdown is set to 'Microsoft Excel 97-2003 (.xls)'. The 'Loop Handling' dropdown is set to 'Separate Files'. The 'Position of Loop Variables' dropdown is set to 'As in questionnaire'. The 'Locale' dropdown is set to 'English (United Kingdom)'. The 'Truncate Open Ends' section has a checkbox for 'No Truncation (Full Length)' which is checked. The 'File Transfer' dropdown is set to 'Email'. The 'Encrypt File' checkbox is unchecked. The 'Email Address' text field contains 'thomasm@confirmit.com'. The 'File Transfer' dropdown is set to 'Email'. The 'Override Email Options' checkbox is unchecked. The 'Override Filename' checkbox is unchecked.

Figure 65 The Target tab when Excel is selected

If you have selected to export to **Excel File** or **Excel File (Answer Codes as Labels)** in stage 1 of the dialog, the properties and options available on the tab are as follows:

- **Excel version** - select the version of the Excel file to which the data is to be transferred. Microsoft Excel 97-2003 and Microsoft Excel (xlsx) are supported.

- **Loop Handling** -specify how loops are to be handled for the export. The options are:
 - o **Separate files** - the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the code of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical project directly to SPSS without having to generate a flattened template.
 - o **Single file** - Instead of exporting loop data as separate files, you can export all data belonging to a project in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.
- **Position of Loop Variables** - only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:
 - o **Appended at end** - the loop variables are appended at the end of the template.
 - o **As in Questionnaire** - the loop variables are positioned as the corresponding loop was placed in the questionnaire.
- **Locale** – specify the area or country in which the data in the file is to be used. This will allow the system to format fields such as date fields according to local standards.

Note: The Locale setting here must match the setting made on the Source tab (see Source Type > Delimited Text File on page 44 for more information).

- **Truncate Open Ends** - when exporting data to Excel, system performance is heavily affected by the number of “unlimited width” text fields in the exports (i.e. Open Text fields with no field width settings). For Open Text questions with no field width specified, you are recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, any texts longer than this limit will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **File transfer** - export files can either be sent by email or placed on an FTP server. FTP is the recommended option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. Note that your company must license the FTP add-on for this option to be available (refer to the Authoring User Guide for more information).
- **Encrypt file** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys. Note that your company must license the Data Transfer Encryption add-on for this option to be available.
- **Email Address** – if Email is selected in File Transfer, add to this field the email address to which the file is to be sent. Default is the user's (your) registered email address.
- **Override Email Options** - when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.
- **Override Filename** - allows you to override the system-generated name. Tick this check-box to open the file name text-box. Here you can edit the system-generated name. Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example “..\myftpfile_in_another_folder.txt”. In this case the file will not be stored in the default folder (“ProjectsData\p123123” or “RulesData\RuleN”), but rather directly under the (Company) Download folder.

Note: The Filename template must contain the ' ^PROJECTID^ ' part of the name as this will be replaced by the real project id during rule execution.

Note: When exporting to Microsoft Excel 97-2003, the column header text will be truncated to 64 characters. Note that this limitation does not exist in the Microsoft Excel 2007 or Delimited Text File export, which can be used instead. The text file output can then be opened and processed as required in Excel.

- **Export language** - [Excel File (Answer Codes as Labels) only] this field is active when Include Labels is checked. In the event the survey is multi-lingual, select the survey language version to be exported.

Note: Microsoft Excel 2007 cannot be imported. Only single files can be imported.

2.2.4.3. Target Type > Fixed Width File

The screenshot shows the 'Target' tab in the Confirmit interface. At the top, there is a navigation bar with buttons: Back, Save, Duplicate, Execute, Validate Action Script, and Export Rule. Below this is a tabbed interface with 'General', 'Source', 'Action', 'Target', and 'Permissions'. The 'Target' tab is selected, and the 'Target Type' is set to 'Fixed Width File'. The form contains the following fields and options:

- Survey Data Template:** A text input field with a 'Select template' button to its right.
- Files to include:** A dropdown menu currently showing 'Schema and data'.
- Data File Encoding:** A dropdown menu currently showing 'Unicode'.
- Schema File Encoding:** A dropdown menu currently showing 'Unicode'.
- Encrypt File:** A checkbox that is currently unchecked.
- Email Address:** A text input field containing 'documentation@confirmit.com'.
- File Transfer:** A dropdown menu currently showing 'Email', with a help icon to its right.
- Override Email Options:** A checkbox that is currently unchecked.
- Override Filename:** A checkbox that is currently unchecked.

Figure 66 The Target tab when Fixed Width File is selected

When Target Type is set to Fixed Width File, the properties and options available on the tab are as follows:

- **Survey Data Template** - select the template to be used from the Template List.
- **Files to include** - select which files are to be included in the export; Schema and data, Schema only, or Data only.
- **Data File Encoding** - to support the export of open text answers in surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Export files. Choose between ANSI (default), Unicode or UTF-8 character encoding. This property defines the encoding for the data file.
- **Schema File Encoding** - to support the export of open text answers in surveys using Unicode (for example Chinese), you can choose the Character Encoding of the Export files. Choose between ANSI, Unicode or UTF-8 (default) character encoding.
- **Encrypt File** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys.
- **Email Address** - if the file is to be sent via email, this is the recipient's email address. Default is the current user's (yours).
- **File Transfer** - export files can either be sent by email or placed on an FTP server. FTP is the recommended option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. Note that your company must license the FTP add-on for this option to be available.
- **Override Email Options** - when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.

- **Override Filename** - allows you to override the system-generated file name. Tick this check-box to open the file name text-box. Here you can edit the system-generated name. Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example “..\myftpfile_in_another_folder.txt”. In this case the file will not be stored in the default folder (“ProjectsData\p123123” or “RulesData\RuleN”), but rather directly under the (Company) Download folder.

2.2.4.4. Target Type > Quantum / SAS

Note: When the target type selected is SAS, the Loop Handling and Position of Loop Variables options will also be available.

Figure 67 The Target tab when Quantum or SAS is selected

When Target Type is set to Quantum or SAS, the properties and options available on the tab are as follows:

- **Truncate Open Ends** - For Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **Encrypt File** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys.
- **Email Address** - if the file is to be sent via email, this is the recipient's email address. Default is the current user's (yours).
- **Loop Handling** - [SAS only] this option is only available if the project included loops. Here you specify how loops are to be handled for the export. The options are:
 - o **Separate files** - the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the code of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical project without having to generate a flattened template.
 - o **Single file** - Instead of exporting loop data as separate files, you can export all data belonging to a project in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.
- **Position of Loop Variables** - [SAS only] only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:

- o **Appended at end** - the loop variables are appended at the end of the template.
- o **As in Questionnaire** - the loop variables are positioned as the corresponding loop was placed in the questionnaire.
- **Recode Multis** - check this box to recode value codes for non-sequential multi variables. For example, a multi variable with the answer codes 1, 2, and 99 will normally use 99 positions in the export, although only three are actually required. Check the box to recode the variables such that they will have the value codes 1, 2 and 3. The variable will then use only three positions. If you have many multi variables with non sequential codes, selecting Recode Multis will greatly reduce the size of the exported file.
- **File Transfer** - export files can either be sent by email or placed on a Confirmit or External FTP server. FTP may be a good option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. In the event External FTP is selected, the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct. Note that your company must license the FTP add-on for the FTP options to be available (refer to the Authoring User Guide for more information).
- **Override Email Options** - when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.
- **Override Filename** - allows you to override the system-generated file name. Tick this check-box to open the file name text-box. Here you can edit the system-generated name. Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example “..\myftpfile_in_another_folder.txt”. In this case the file will not be stored in the default folder (“ProjectsData\p123123” or “RulesData\RuleN”), but rather directly under the (Company) Download folder.

Note: The Filename template must contain the '^PROJECTID^' part of the name as this will be replaced by the real project id during rule execution. Default is ^PROJECTID^ ^USERID^ ^TASKID^.

2.2.4.5. Target Type > Respondent Data

When the Source Type (see The Source Tab on page 44 for more information) is set to Respondent Data in the General tab (see The General Tab on page 41 for more information), the Target tab will be as shown in the figure below.

The screenshot shows the 'Target' tab in the Confirmit Horizons 23 interface. At the top, there are buttons for 'Back', 'Save', 'Duplicate', 'Execute', 'Validate Action Script', and 'Export Rule'. Below these are tabs for 'General', 'Source', 'Action', 'Target', and 'Permissions'. The 'Target' tab is active, showing 'Target Type' as 'Respondent Data'. The 'Project ID' field contains 'p3995101' and has a 'Select project' button. The 'Execution Mode' is set to 'Update Data'. A yellow tooltip box with an information icon states: 'Select the key field that is to be used as the unique identifier. This field must exist in both the Source and the Target database. If you have already transferred response data, use the Source Project ID\Resp ID, as the system will then already have stored the source keys in the target database and will use those keys when mapping respondents.' The 'Key Field' dropdown is set to 'Source Project ID\Resp ID'. At the bottom is a 'Map Fields' button.

Figure 68 The Target tab when Respondent Data is selected

Note: The number of variables that can be copied is limited by the maximum size of the Respondent table (it can contain no more than 1024 columns).

- **Project ID** – type in here or select the project ID of the target.
- **CATI scheduling** - respondent data being loaded into a CATI-enabled project can have one of the following scheduling modes applied:
 - o **Simple scheduling** – this will by default create a call without an assignment with a time to call of now. The following respondent data can adjust the call created:
 - **CatiInterviewerID** – will assign the call to the specified group/interviewer ID, a blank (or invalid) value will result in no explicit assignment being made.
 - **CatiCallTime** – will assign the date and time to call based on the respondent timezone or the local company timezone if no timezone is specified, defaulting to the company local timezone, a blank (or invalid) value will result in the time to call to be set to now. An example value could be: 2001-03-14 13:30
 - **CatiExtendedStatus** – will assign the extended status to that value, a blank (or invalid) value will result in the extended status being set to be Fresh Sample (16). Values other than 16 will not have a call created for them.
 - **DialMode** – will assign the call to be dialed with the given dial mode. (e.g. 2 for Preview).
 - o **Full scheduling** – this will run all respondent data through the full scheduling engine and adhere to all calling rules. This mode should be used if advanced scheduling is required at the respondent loading time.

Note: The functionality will only create new CATI calls in the target project based on the sample variables being pulled across from the source. That is, it will not copy across existing CATI calls from source to target. Also, Call History values will not be pulled across because loops are not supported in the respondent db.

- **Execution Mode** - this property is available except when the Source is set to either Respondent Data or Survey Database and the same project is selected as both Source and Target. When the property is available you can choose between three modes, listed below. In all the modes the user will be asked to provide a key (see Key field below).
 - o **Update Data** - records from the source will update any matching records in the target database. The selected key field will be used to match records from the source to records in the target database. Any records in the source database that do not match the selected key fields in the target will be ignored.
 - o **Append Data** - the records from the source will be added to any data that already exists in the target database. If a key field is selected, and there is a match in the key field between data in the source and the target, that data will not be added again. If there is no key field selected, the records of the source database will be appended each time to the target database.
 - o **Merge data** - a combination of updating and appending of records will be executed. The selected key field will be used to match records from the source to records in the target database. Records from the source database will update matching records in the target, and any records not matching the selected key field will be appended.
- **Key field** - appears when Execution Mode is available. The key field must exist in the source and the target, and is used as a unique identifier to indicate which records are to be updated and which are to be appended. You may choose as the key field any survey variable that has a unique value for each respondent. Typical key fields can be an email address or a customer number, though if a field "Email" exists in the Source and Target this will be set as default.

When updating respondents in the target database, the key "Source Project ID\Resp ID" can be used. If you have already transferred response data, then you are recommended to use the Source Project ID\Resp ID as the system will already have stored the source keys in the target database and will use those keys when mapping respondents. Note that if you wish to update respondents and you do not have a usable key field available, then the Source Project ID\Resp ID option must be used.

- **Map Fields** - use this to map fields/columns with different names in source and target, from the source to the Confirmit Survey Database (see Mapping Fields on page 70 for more information).

Note that the Map Fields overlay layout is different when Target Respondent > Toggle Key Field does not exist and is not required, since in this scenario the key field specified in the drop-down list in the Target tab of a Data Processing rule will be automatically set as key field

2.2.4.6. Target Type > SPSS

Note: Some of the options are only available when the project includes loops.

The screenshot shows the 'Target' tab of a configuration window. At the top, there is a toolbar with buttons: Back, Save, Duplicate, Execute, Validate Action Script, and Export Rule. Below the toolbar are tabs: General, Source, Action, Target (selected), and Permissions. The 'Target Type' is set to 'SPSS File'. The configuration options include:

- Truncate Open Ends:** A text input field with the value '50' and a help icon.
- Encrypt File:** A checkbox that is currently unchecked.
- Email Address:** A text input field with the value 'documentation@confirmit.com'.
- Character Encoding for Data File:** A dropdown menu set to 'UTF-8'.
- Decimal Delimiter:** A dropdown menu set to 'Point (.)'.
- Loop Handling:** A dropdown menu set to 'Single File' with a help icon.
- Position of Loop Variables:** A dropdown menu set to 'As in questionnaire'.
- File Transfer:** A dropdown menu set to 'Email' with a help icon.
- Override Email Options:** A checkbox that is currently unchecked.
- Override Filename:** A checkbox that is currently unchecked.

Figure 69 The Target tab when SPSS is selected

When Target Type is set to SPSS, the properties and options available on the tab are as follows:

- **Truncate Open Ends** - For Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **Encrypt File** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys.
- **Email Address** - if the file is to be sent via email, this is the recipient's email address. Default is the current user's (yours).
- **Character Encoding for Data File** - To support the export of open text answers in surveys using Unicode (for example Chinese), you can choose Character Encoding of the Export files. Choose between ANSI (default) and Unicode character encoding.

Important
The customer must enable the Unicode Character Encoding Option in SPSS itself before loading the sps/dat file.

- **Decimal Delimiter** - select the character to be used as the decimal point.
- **Loop Handling** - specify how loops are to be handled for the export. The options are:

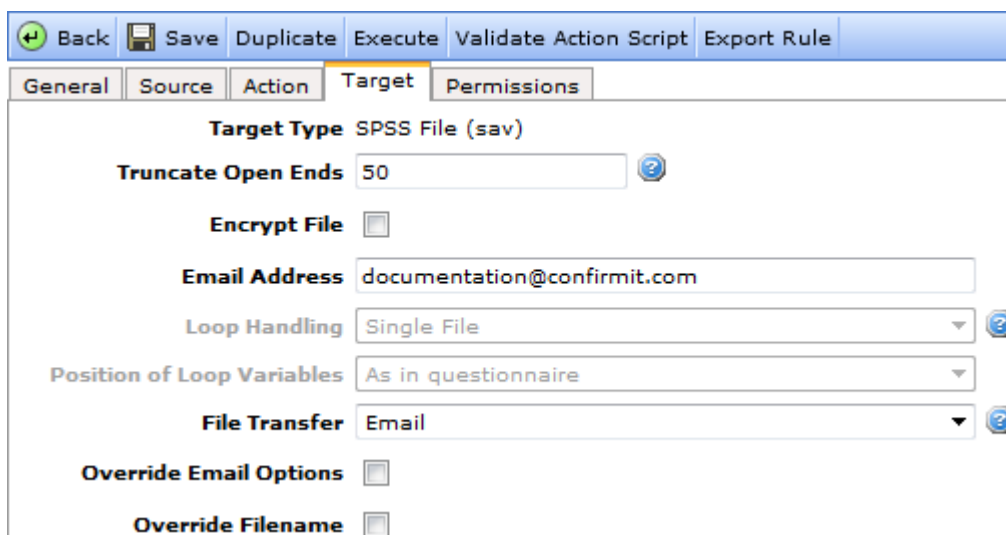
- o **Separate files** - the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the code of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical project directly to SPSS without having to generate a flattened template.
- o **Single file** - Instead of exporting loop data as separate files, you can export all data belonging to a project in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.
- **Position of Loop Variables** - only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:
 - o **As in Questionnaire** - the loop variables are positioned as the corresponding loop was placed in the questionnaire.
 - o **Appended at end** - the loop variables are appended at the end of the template.
- **File Transfer** - export files can either be sent by email or placed on a Confirmit or External FTP server. FTP may be a good option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. In the event External FTP is selected, the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct. Note that your company must license the FTP add-on for the FTP options to be available (refer to the Authoring User Guide for more information).
- **Override Email Options** - when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.
- **Override Filename** - allows you to override the system-generated file name. Tick this check-box to open the file name text-box. Here you can edit the system-generated name. Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example “..\myftpfile_in_another_folder.txt”. In this case the file will not be stored in the default folder (“ProjectsData\p123123” or “RulesData\RuleN”), but rather directly under the (Company) Download folder.

Note: The Filename template must contain the '**^PROJECTID^**' part of the name as this will be replaced by the real project id during rule execution. Default is **^PROJECTID^ ^USERID^ ^TASKID^**.

2.2.4.7. Target Type > SPSS (SAV)

Note: When Source is Survey Data and multiple projects are selected, for SPSS (sav) files the data is exported to separate files for each project.

Note: Some of the options are only available when the project includes loops.



The screenshot shows the 'Target' tab in the Confirmit Horizons 23 Data Processing User Guide. The 'Target Type' is set to 'SPSS File (sav)'. The 'Truncate Open Ends' field is set to '50'. The 'Encrypt File' checkbox is unchecked. The 'Email Address' field contains 'documentation@confirmit.com'. The 'Loop Handling' dropdown is set to 'Single File'. The 'Position of Loop Variables' dropdown is set to 'As in questionnaire'. The 'File Transfer' dropdown is set to 'Email'. The 'Override Email Options' checkbox is unchecked. The 'Override Filename' checkbox is unchecked.

Figure 70 The Target tab when SPSS (SAV) is selected

When Target Type is set to SPSS (SAV), the properties and options available on the tab are as follows:

- **Truncate Open Ends** - For Open Ends (Open Text questions with no field width specified), it is recommended to truncate texts to improve performance. If a number of characters is specified for the Open Ends Width, texts longer than this limit, if any, will automatically be truncated. If No Truncation (Full Length) is selected, the whole text will be imported/exported, but the task will take significantly longer to execute.
- **Encrypt File** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys.
- **Email Address** - if the file is to be sent via email, this is the recipient's email address. Default is the current user's (yours).
- **Loop Handling** - specify how loops are to be handled for the export. The options are:
 - o **Separate files** - the default export format for loops creates one export file for each loop, and one export file for the top level. In the files containing the loop data there will be one row per loop iteration per respondent, so there will be several rows for each respondent. Each row will have the responseid (system generated respondent id) of the respondent and the code of the loop id for the iteration as identifiers, and then the answers for the questions inside the loop for that specific iteration for that respondent. This means you can export a hierarchical project directly to SPSS without having to generate a flattened template.
 - o **Single file** - Instead of exporting loop data as separate files, you can export all data belonging to a project in one single file. Loop data will then be expanded. This means that variables will be created to represent each iteration of each question.
- **Position of Loop Variables** - only available when Single file is selected in the Loop Handling option. This allows the user to specify in which position the loop variables should be exported. The options are:
 - o **As in Questionnaire** - the loop variables are positioned as the corresponding loop was placed in the questionnaire.
 - o **Appended at end** - the loop variables are appended at the end of the template.
- **File Transfer** - export files can either be sent by email or placed on a Confirmit or External FTP server. FTP may be a good option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. In the event External FTP is selected, the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct. Note that your company must license the FTP add-on for the FTP options to be available (refer to the Authoring User Guide for more information).

- **Override Email Options** - when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.
- **Override Filename** - allows you to override the system-generated file name. Tick this check-box to open the file name text-box. Here you can edit the system-generated name. Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example “..\..\myftpfile_in_another_folder.txt”. In this case the file will not be stored in the default folder (“ProjectsData\p123123” or “RulesData\RuleN”), but rather directly under the (Company) Download folder.

Note: The Filename template must contain the ' ^PROJECTID^ ' part of the name as this will be replaced by the real project id during rule execution. Default is ^PROJECTID^ ^USERID^ ^TASKID^.

2.2.4.8. Target Type > Survey Database

Note: For several of the properties and property options, availability depends on the source type selected. When a property or option is source-specific, this is specified in the text.

When the Source Type (see The Source Tab on page 44 for more information) is set to Triple-S Data in the General tab (see The General Tab on page 41 for more information), the Target tab will be as shown in the figure below.

Note: When the Source Type is set to Survey Database, the Key Field property is hidden, the Columns options become active, and the Validation Setting options are only available if Columns is set to Survey Data Template. In addition, the Map Fields button is available when the Source is set to Delimited Text File or Confirmit Survey Database.

Target Type: Survey Database

Project ID: p1052575 Select project

Use Test Database ☐

Clear Existing Data ☐

Execution Mode: Update Data ?

Map Fields

Columns: ☐ All Columns (no filter) ☐ Select... (no filter column selected) Select columns ☒ Survey Data Template

DocTest1 Select template

Validation Setting: ☐ Allow variables in the template that do not exist in the database ☐ Show Warning ☐ Allow answers in the template that do not exist in the database ☐ Show Warning

Disable population of respondent data ☐

Use Transaction ☐ (If this option is selected, all changes made to the target project will be rolled back if an error occurs.)

Figure 71 The Target tab when the Source Type is set to Triple-S Data and the Target Type is set to Confirmit Survey Database

When Target Type is set to Confirmit Survey Database, the properties and options available on the tab are as follows:

- **Project ID** – type in here or select the project ID of the target.
- **Use Test Database** – check this box if you are testing the setup and wish to use data from the test database.
- **Clear existing data** – becomes active when the Source Type is set to Confirmit Survey Database (it is inactive if Source Type is set to Triple-S Data File). Check to remove all existing data from the database before adding the new data.

WARNING:
All your data will be deleted.
 If you select Clear Existing Data, ALL existing data will be removed from the database when the rule is run; not just the variables in the schema. This deletion process cannot be undone. Be very careful when using this option.

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

When both Source and Target are Survey Database, and the same project is selected for the Source and the Target:

- o **Update Data** - records from the source will update any matching records in the target database. The selected key field will be used to match records from the source to records in the target database. Any records in the source database that do not match the selected key fields in the target will be ignored.

- o **Delete Data** - when the Action tab contains an action script that includes the DeleteCurrentResponse() or the DeleteCurrentResponseAndRespondent() function, selecting Delete Data will perform the specified action. DeleteCurrentResponse() will delete the responses from the survey database that are selected by the filter currently applied in the Source tab (note that use of a filter in this case is mandatory). DeleteCurrentResponseAndRespondent() will delete both the responses from the survey database and the respondents from the respondent database that are selected by the filter currently applied in the Source tab. Note that if you continue with this action, the selected responses and/or respondents will be permanently removed from the databases and cannot later be retrieved. Note that only one project can be selected as source when Delete Data is selected as Execution mode.

Important

If your survey contains quotas, deleting data could cause quota counts to be incorrect. This can be rectified by running a quota recalculation for the quotas. Note that this is not performed automatically when the data is deleted

When both Source and Target are Survey Database and different projects are selected for the Source and the Target, or if a source other than Survey Database is selected, you can choose between the three modes listed below. In all the modes the user will be asked to provide a key (see Key field below).

- o **Update Data** - any records in the source that already exist in the target survey database will be updated with values from the source. Any records in the source that do not already exist in the target survey database will be ignored.
- o **Append Data** - any records in the source that do not exist in the target survey database will be added to the target survey database. Any records in the source that already exist in the target survey database will be ignored.
- o **Merge data** - all the data from the source will be added to the target survey database. Any records in the source that already exist in the target survey database will be updated, and any records in the source that do not currently exist in the target survey database will be added to the target survey database.

In these scenarios, when new records are added, the new records are inserted both in the response data and in the respondent table (respondent list).

- **Map Fields** - available if Source Type is Delimited Text File or Confirmit Survey Database. Use this to map fields/columns with different names in source and target, from the source to the Confirmit Survey Database (see Mapping Fields on page 70 for more information).
- **Key field** - the key field is used as a unique identifier to indicate which records are to be updated and which are to be appended. The key field is also used to map the responses in the top-level file with the responses in loop response files. **The key field must exist in both the import file(s) and the database.**

System variables respid and responseid and all survey variables with the "Indexed" property set, will be displayed in the "Key field" drop-down. You may choose any survey variable that has a unique value for each respondent as key field. The key field should either be one of the system-provided ids (respid or responseid), or an open text question with a defined field width. Examples of key fields could be membership number, customer id or email address.

In the event the Source is Delimited text file or Excel, a key field is not required when appending data. So in this case, when Execution Mode is set to Append Data, the Key Field can be set to **None**.

Important

The fields respid and responseid are system-provided ids in Confirmit. When appending records (inserting records that are not already present) through data import with one of these fields as key field, the system will replace the ids you import with new system-generated ids.

- **Columns** - select the columns you wish to include; all, selected, or as used in the selected template.
- **Source / Target variable usage** - This option is used when columns are selected either manually or by using a template. When both the source and the target are Survey Database, and Columns are selected, this property is active. Two options are then available:

- o **As filter (Target variables match source variables) (default)** - only columns that are selected from the source and that exist in the target will be transferred to the target. For example: The source contains the columns [responseid, interview_start, interview_end, status, q1, q2], and the target has the columns selection [responseid, status, q1, q3]. The columns transferred to the target database will be those that exist in both the source and the target [responseid, status, q1].
- o **Convert Source variables to new Target variables** - this option can only be used when the source is a survey database from a different project. The selected columns will be available as output columns in the Action Script, where a value can be assigned. The output columns are prefixed with "T.". Only the columns selected in the target will be transferred to the target database. Source columns can be mapped to target columns that have different or same names. In this way, source columns can also be transferred to the target database automatically. Columns responseid and respid will always be transferred from source to target.

Example: The source contains the columns [responseid, interview_start, interview_end, status, q1, q2]. The target has the columns [responseid, status, q5_a, q5_b]. Status from source is mapped to status in target. The Action Script looks like:

T.q5_a = q1;

T.q5_b = q2;

If the following row comes from the source [23, '01-01-2014 12:33:23 PM', '01-01-2014 12:37:23 PM', 'complete', 1, 6],

then the input to the target will be [responseid, status, q5_q, q5_b] with values [23, 'complete', 1, 6].

- **Validation Setting** - check the boxes as required (see Validation Rules on page 179 for more information).
- **Disable Population of Respondent Data** - this checkbox appears only if both Source and Target are set to Confirmit Survey Database and different databases are selected. Selecting this will cause the import to run faster because no respondent data is added. This property must therefore only be selected for projects where the target database will not be accessed by respondents and respondent data is not required, for example if the project is used to collect data from other surveys.

Important

Do not check this box for live surveys.

- **Use Transaction** - if this option is selected, all changes made to the target project will be rolled back if an error occurs.

Note: If your Target Survey Database or Respondent Data does not contain any records and you are using Action scripting to push data from the Source, if the script does not change any values and contains only the "AddLogMessage " function, data will only be transferred to the Target if you use "Append" as the Execution mode.

2.2.4.9. Target Type > Triple-S XML (Standard or Extended)

The screenshot shows the 'Target' tab of a configuration window. At the top, there are buttons: Back, Save, Duplicate, Execute, Validate Action Script, and Export Rule. Below these are tabs: General, Source, Action, Target (selected), and Permissions. The 'Target' tab contains the following settings:

- Target Type:** Triple-S XML (Standard)
- Survey Data Template:** A text box with a 'Select template' button.
- Files to include:** A dropdown menu set to 'Schema and data'.
- Data File Encoding:** A dropdown menu set to 'ANSI'.
- Schema File Encoding:** A dropdown menu set to 'UTF-8'.
- Encrypt File:** An unchecked checkbox.
- Email Address:** A text box containing 'documentation@confirmit.com'.
- File Transfer:** A dropdown menu set to 'Email'.
- Override Email Options:** An unchecked checkbox.
- Override Filename:** An unchecked checkbox.

Figure 72 The Target tab with Triple-S XML selected

When Target Type is set to Triple-S Data File or Confirmit Extended Triple-S XML, the properties and options available on the tab are as follows:

- **Survey Data Template** - select the template to be used from the Template List.
- **Files to include** - select which files are to be included in the export; Schema and data, Schema only, or Data only.
- **Data File Encoding** - select ANSI or Unicode as appropriate.
- **Schema File Encoding** - select ANSI, Unicode or UTF-8 (default) as appropriate.
- **Encrypt File** - data transfer encryption functionality makes it possible to perform secure data exports from Confirmit. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys.
- **Email Address** - if the file is to be sent via email, this is the recipient's email address.
- **File Transfer** - export files can either be sent by email or placed on an FTP server. FTP is the recommended option for large volumes of data, since emails with large attachments may be blocked. FTP can allow automation of data flows, since files can then be picked up automatically by another system/process. Note that your company must license the FTP add-on for this option to be available.
- **Override Email Options** - when selected, allows you to override the standard export email options and customize both the subject and the email that will be sent to the export recipient. Checking this box displays a number of additional options.
- **Override Filename** - allows you to override the system-generated file name. Tick this check-box to open the file name text-box. Here you can edit the system-generated name. Note that when exporting Survey Data to the FTP server in Survey Data > Exports or Data Processing rules, the Override Filename option accepts relative paths, as for example "...\\myftpfile_in_another_folder.txt". In this case the file will not be stored in the default folder ("ProjectsData\\p123123" or "RulesData\\RuleN"), but rather directly under the (Company) Download folder.

2.2.4.10. Mapping Fields

When the target is a Confirmit Survey Database, and the source is a Delimited Text File or another Confirmit Survey Database, you can map fields (columns) that have different names in the source and target. To do this:

1. In the rule's Target tab, click the **Map Fields** button.

The Target page changes to display lists of the source fields and target fields.

Figure 73 Example of the Source and Target Field lists for a rule

2. Select pairs of fields; one in the Source Fields list and one in the Target Fields list, and click **Map Fields**.

The fields are mapped. To indicate this, the field name is moved from the Source Fields list and displayed in the Mapped To column in the Target Fields list.

Figure 74 The age field from the Source is mapped to the ageNum field in the Target

3. Save your changes.

Other buttons on this page are:

- **Automap Fields** - automatically maps all fields that have matching names in the Source and Target Fields lists. The types of the fields being mapped is ignored during automapping. Save changes on completion.
- **Remove Mapping** - select a mapping in the Target Fields list and click this button to remove it. The field in the Mapped To column is returned to the Source Field list. Use this button also to remove un-wanted key fields. Save your changes.
- **Remove All Mappings** - click to remove all mappings (don't forget to save the changes).

- **Toggle Key Field** - changes the fields used as Key Fields (see Target Type > Survey Database on page 66 for more information). Select a field in the target Fields list and click **Toggle Key Field** button. The Key Fields (source/target) row towards the top of the page is updated. Note that you can select any number of fields as key fields. However these must be selected individually, and only fields that have been indexed can be used. A Key icon is displayed in the Key Field column for the selected field.

2.2.5. The Permissions Tab

The user who creates a rule has full administrator rights to that rule. All other users have no rights; they cannot even see the rule in their rule list, until the creator has allocated the appropriate rights to them. The Current Rule Permissions tab allows the creating user to allocate access rights to the rule he/she has created, to the various other users in the company.

User Name	Last Name	First Name	Permission Type
acestero	Cestero	A.J.	Administrate
ACL	dfs	sf	None
addmodify1_mb	Jalla	Jo	None
addmodify2_mb	Jalla	Jo	None
addmodify3_mb	Jalla	Jo	None
addmodify4_mb	Jalla	Jo	None
addmodify5_mb	Jalla	Jo	None
adm	d	a	None

Figure 75 Example of the Permissions tab for a rule

For each user listed, click the down-arrow in the Permission Type column and select the appropriate permission. On completion, save the changes.

In the event the list of users is extensive, add search criteria to the various search fields then click **Search** to reduce the list to manageable proportions. Click **Reset** to remove all input search criteria and display the full list.

If all the employees in your company are to have the same permission level for the rule, select the permission level from the drop-down list towards the right end of the Search toolbar, then click **Grant All**. All employees will then be given the selected permission.

2.2.6. Example of Transferring Data

How to transfer data from Survey Data in one survey to Respondents List in a different survey.

Confirmit includes the following Data Processing capabilities:

- Respondent > Response (Same project).
- Respondent > Respondent (Same/Different project).
- Response > Respondent (Same/Different project).

In this example we will use a Data Processing Rule to transfer data from a surveys Response database to a Respondent database in a different survey. This functionality can be very useful if you wish to use the data that the respondents enter in one survey as background data in a different survey, for example to send a follow-up survey.

In this example two questions will be moved from one survey into a second survey.

In the first survey, the respondents are asked if they want to participate in a second survey. If they say yes (code 1), they will be asked to input the name and email address that the link should be sent to. These two questions are normal questions in the first survey, while in the second survey the two questions are added as background questions.

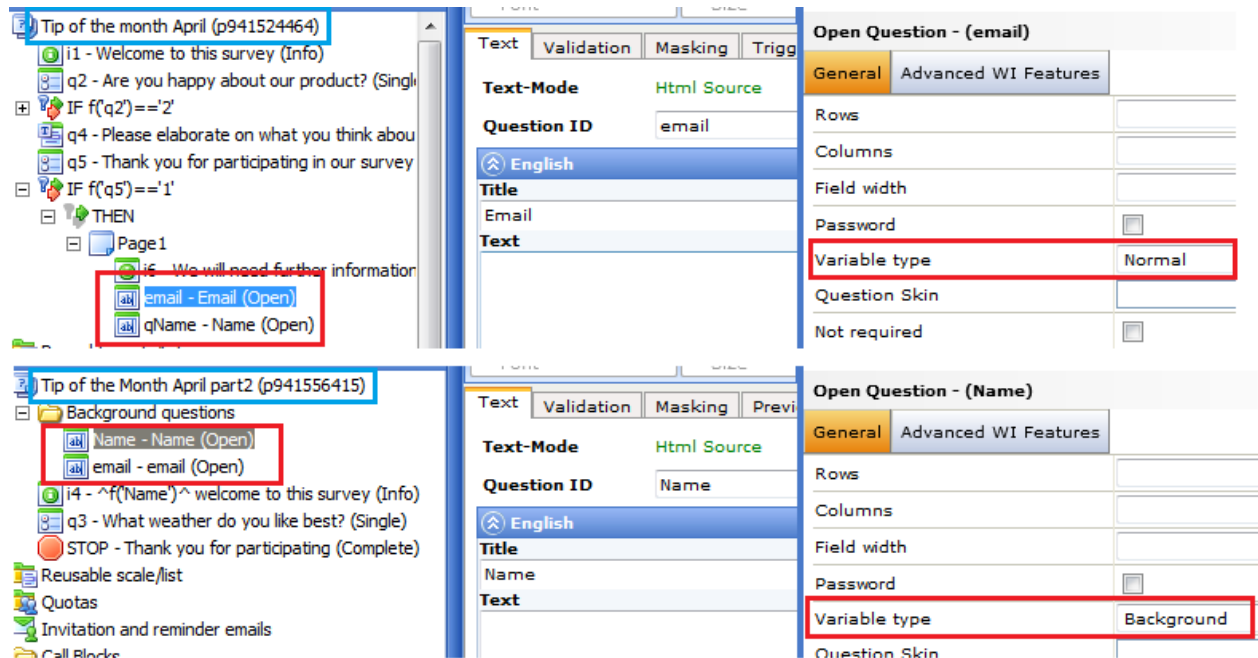


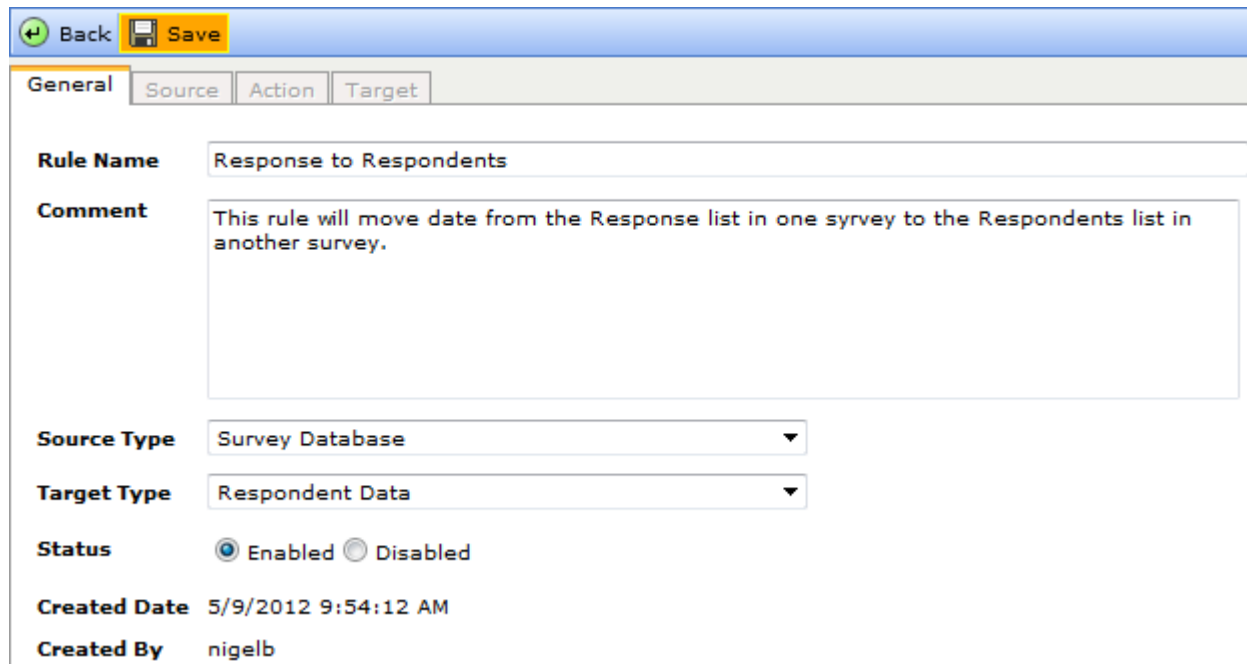
Figure 76 The two surveys used in this example

To create the data processing rule:

1. Go to the **Data Processing > Rule List** menu command to open the Rule List Page.
2. Click the **New Rule** button.
3. In the General tab, add a name for the rule and a comment as necessary.
4. Specify the type of rule required.

As we wish to move data from Survey data to Respondents list, select:

- o Source Type to Survey Database.
- o Target Type to Respondent Data.



The screenshot shows a web interface for configuring a rule. At the top, there are 'Back' and 'Save' buttons. Below them are tabs for 'General', 'Source', 'Action', and 'Target'. The 'General' tab is active. It contains the following fields:

- Rule Name:** Response to Respondents
- Comment:** This rule will move data from the Response list in one survey to the Respondents list in another survey.
- Source Type:** Survey Database
- Target Type:** Respondent Data
- Status:** Enabled (radio button selected), Disabled (radio button unselected)
- Created Date:** 5/9/2012 9:54:12 AM
- Created By:** nigelb

Figure 77 Making the settings in the General tab

5. Save the changes then go to the Source tab.
6. Specify in Project IDs the project that is to provide the data.
7. Add an expression which will only move data for those that have answered Yes in the appropriate question (in this case q5).
8. As this is going to be a recurring task, set Data to be included to "Data changed since last run" to ensure the rule only adds the newest data.
9. In the Columns section, click the **Select Columns** link and select the questions that are to provide the data.

General
Source
Action
Target
Permissions

Source Type Survey Database

Project IDs
☒

Keyword Filter
☐

Data Filter

Interview status filter

☐ Complete Responses
☐ Incomplete Responses
☐ Screened
☐ Quota Full
☐ Error
☒ All (unfiltered)

Expression

Date Filter
☐ Start Date

End Date

Relative Date Filter
☐

Data to be included

(Only applies to recurring tasks)

Columns

☐ All Columns (no filter)
☒ Columns...(filter columns have been selected)
☐ Survey Data Template

Text in Question Labels

Text in Answer Element Labels

Figure 78 Making the settings in the Source tab

Name	Type	Loop Level
status	character	
interview_start	date	
interview_start_time	time	
interview_end	date	
interview_end_time	time	
last_touched	date	
last_touched_time	time	
lastcomplete	date	
lastcomplete_time	time	
q2	single	
q3	character	
q4_1	character	
q4_2	character	

Name	Type
responseid	quantity
respid	quantity
q5	single
email	character
qName	character

Figure 79 Selecting the questions that are to provide the data

10. Go to the Target tab.
11. In the Project ID field, add the project to which the data is to be moved.
12. As we wish to add new data to this project, set the Execution Mode to "Append data".

Note: A Key field must usually be specified as the unique identifier, but as in this case the data to be Appended will be new records "applied since last run" a Key field is not required.

Target Type Respondent Data

Project ID p941556415 Select project

Execution Mode Append Data

Key Field email

Map Fields

Warning: Please select the key field that is to be used as the unique identifier. This field must exist in both the Source and the Target database.

If a key field is selected and there is a match in the key field between the data in the source and the target, that data will not be added again. If no key field is selected, the records from the source database will be appended to the target database each time the rule is run.

Figure 80 The Target tab

The id for the question "name" is not the same in the two projects ("qname" in the first and "Name" in the second). We will therefore need to Map Fields so the system will know which question it should add the data from qname to.

When you click on **Map Fields** in the Target tab, all the variables selected in the source template will be listed in the left column and all the variables in the Target project will be listed in the right column. Click on "qname" in the left column, then "Name" in the right column, then click on **Map Fields** to connect them together.

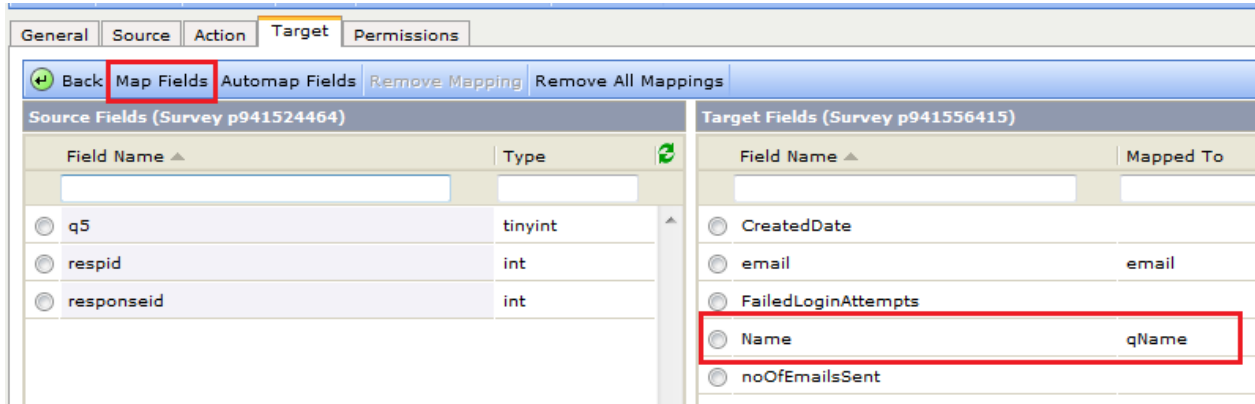


Figure 81 Mapping the fields

In the figure below are listed three responses to the first survey, where two have answered "Yes" (code 1) to q5 and have entered an email address and a name.

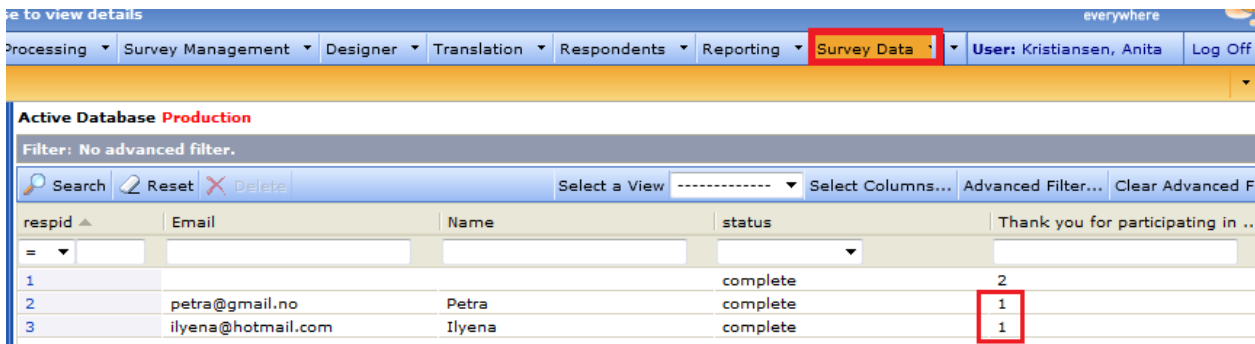


Figure 82 Example of responses

- Click **Execute** in the data processing rule to run the rule.

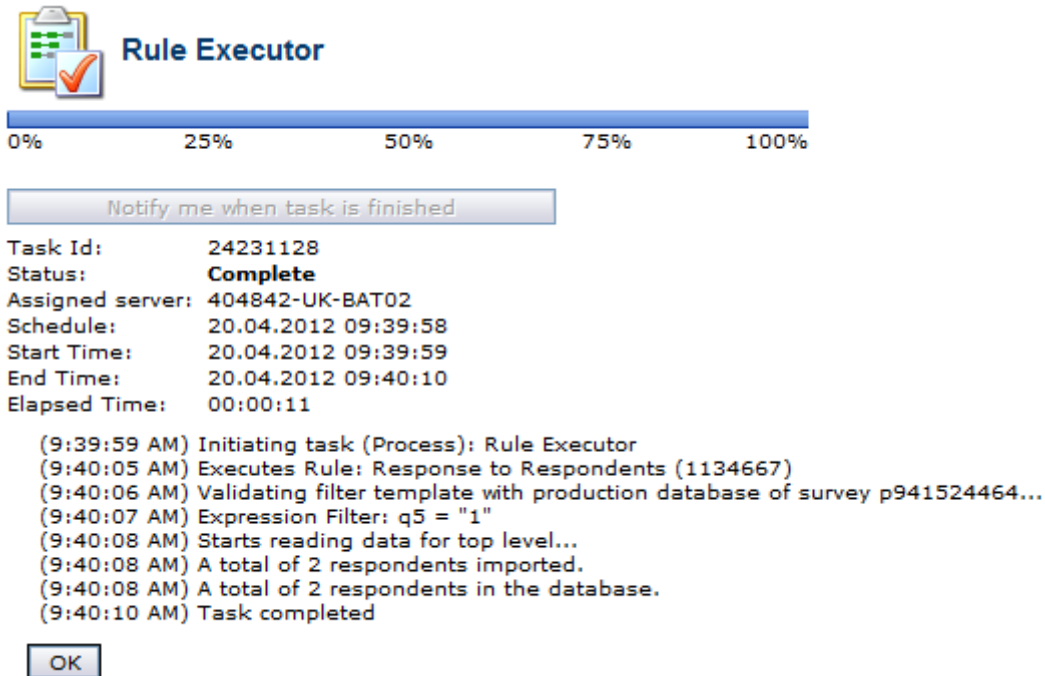


Figure 83 The task results

In this case, two respondents were moved into the second survey. If you open the second survey you will see these two in the respondent list.

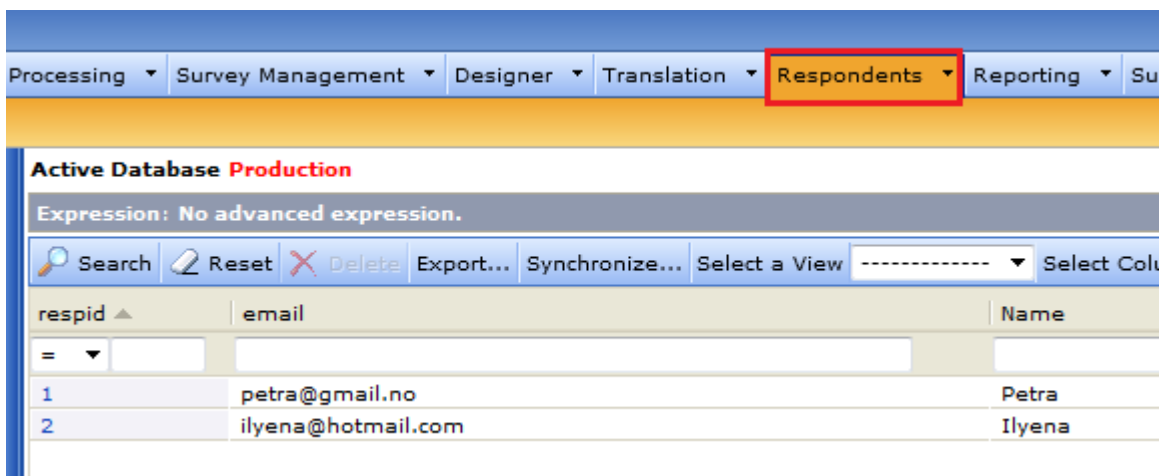


Figure 84 The second survey with the two respondents

The second survey is now ready to send out invitations. If the Source is still open and collecting data, the task can be set to recur automatically and move new respondents to the target survey.

2.3. Current Rule Set

A Rule set is a number of rules that are to be run consecutively. The rules are run in the order in which they are listed in the set.

To open the latest rule set selected from the Rule Set List during the current session, go to the **Data Processing > Current Rule Set** menu command. If no rule set has been selected during the current session, then the Rule Set List will be displayed (see Rule Set List on page 86 for more information)

When you click on a rule set in the Rule Set List or go to the **Data Processing > Current Rule Set** menu command, the Rule Set Details page opens at the General tab as shown in the example below.

Back Save Execute

General Rule Management Report Permissions

Rule Set ID: 1

Rule Set Name: DocRuleSet1

Type: Recurring

Comment: No comment.

Status: ☒ Enabled ☐ Disabled

Disable Sampling When Executing: ☐

Date Created: 19/08/2008 15:14:22

Created By: administrator

Date Updated: 19/08/2008 15:15:06

Updated By: administrator

Figure 85 Example of the Rule Set Details General tab

2.3.1. The General Tab

The Rule Set Details page opens at the General tab.

The screenshot shows the 'General' tab of the 'Rule Set Details' page. At the top, there are buttons for 'Back', 'Save', and 'Execute'. Below these are four tabs: 'General' (selected), 'Rule Management', 'Report', and 'Permissions'. The form contains the following fields:

- Rule Set ID:** A text box containing the value '1'.
- Rule Set Name:** A text box containing the value 'DocRuleSet1'.
- Type:** A dropdown menu with 'Recurring' selected.
- Comment:** A large text area containing the text 'No comment.'.
- Status:** Two radio buttons, 'Enabled' (selected) and 'Disabled'.
- Disable Sampling When Executing:** A checkbox that is currently unchecked.
- Date Created:** 19/08/2008 15:14:22
- Created By:** administrator
- Date Updated:** 19/08/2008 15:15:06
- Updated By:** administrator

Figure 86 Example of the Rule Set Details page > General tab

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

2.3.2. The Rule Management Tab

Use this tab to specify what is to occur in the event Confirmit discovers an error whilst the rule set is running.

- To add rules to the set, select the required rule and click Add (see How to Add a Rule to the Rule Set on page 81 for more information).
- To set up the properties for a rule in the set, double-click on the rule in the left column to open the Details page. The example below shows the details page for the "Export data to excel..." rule that has been selected in the left column.

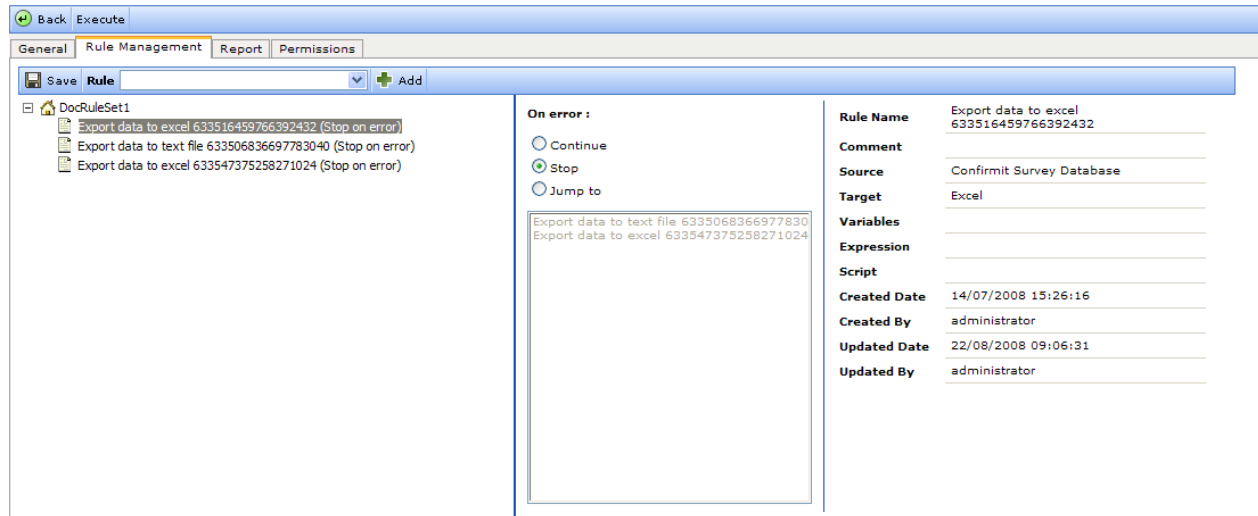


Figure 87 Example of the Rule Management tab

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

2.3.2.1. How to Add a Rule to the Rule Set

1. Go to the **Panel Management > Current Rule Set** menu command.
2. In the Rule Management tab, click the down-arrow beside the Rule field to open a drop-down list of the rules available.

Note: Once a rule is added to the set it is removed from the list so you cannot run the same rule twice in the same set.

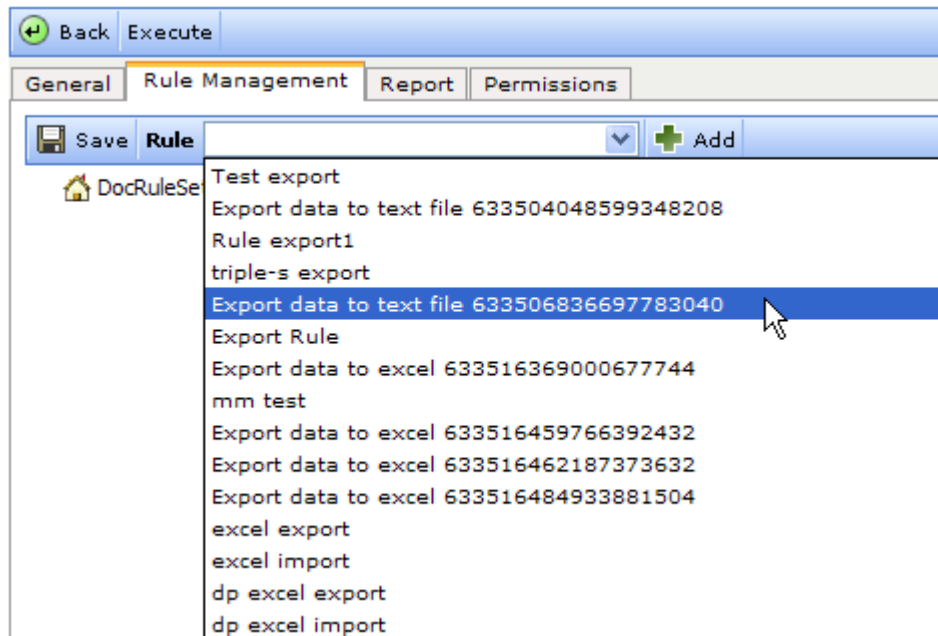


Figure 88 Selecting a rule to add to the rule set

3. Select the required rule from the list.
4. Click **Add**.

The rule is added to the rule set.

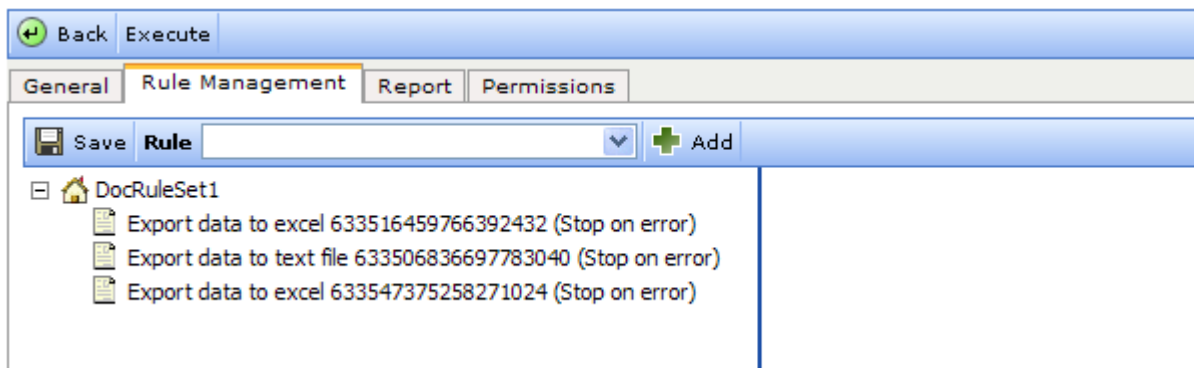


Figure 89 The rule added to the rule set

5. Double-click on the rule to open its Details pane, then make the appropriate settings (see The Rule Management Tab on page 80 for more information).
6. On completion, click **Save** to save the changes.

2.3.3. The Report Tab

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

Back

Execute

General

Rule Management

Report

Permissions

Printer Friendly Version

Rule Set Name: DocRuleSet1

Type: Recurring

Status: Enabled

Date Created: 19/08/2008 15:14:22 by administrator

Date Updated: 22/08/2008 09:07:11 by administrator

1.

Rule Name: Export data to excel 633516459766392432 - Created: 14/07/2008 15:26:16 by administrator

Source: SurveyData

Target: Excel

Action

On Error: Stop

2.

Rule Name: Export data to text file 633506836697783040 - Created: 03/07/2008 12:07:49 by administrator

Source: SurveyData

Target: File

Action

On Error: Stop

3.

Rule Name: Export data to excel 633547375258271024 - Created: 19/08/2008 10:12:05 by administrator

Source: SurveyData

Target: Excel

Action

On Error: Stop

Figure 90 Example of the Report tab

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

2.3.4. The Permissions Tab

The user who creates a rule set has full administrator rights to that rule set. All other users have no rights; they cannot even see the rule in their rule list, until the creator has allocated the appropriate rights to them. The Current Rule Set Permissions tab allows the creating user to allocate access rights to the rule set he/she has created, to the various other users in the company.

Back Execute

General Rule Management Report **Permissions**

Search Reset Save None Grant All

Source Own company

User Name	Last Name	First Name	Permission Type
acestero	Cestero	A.J.	None
ACL	dfs	sf	None
addmodify1_mb	Jalla	Jo	None
addmodify2_mb	Jalla	Jo	None
addmodify3_mb	Jalla	Jo	None
addmodify4_mb	Jalla	Jo	None
addmodify5_mb	Jalla	Jo	None
adm	d	a	None

Figure 91 Example of the Permissions tab for a rule set

For each user listed, click the down-arrow in the Permission Type column and select the appropriate permission. On completion, save the changes.

In the event the list of users is extensive, add search criteria to the various search fields then click **Search** to reduce the list to manageable proportions. Click **Reset** to remove all input search criteria and display the full list.

If all the employees in your company are to have the same permission level for the rule set, select the permission level from the drop-down list towards the right end of the Search toolbar, then click **Grant All**. All employees will then be given the selected permission.

2.4. Rule List

Go to the **Data Processing > Rule List** menu command to display a list of all the Data Processing rules for this project. From the Rule List you can create new rules, both "standard" (see How to Create a New Rule on page 85 for more information) and Data Central rules (see How to Create a New Data Central Rule on page 90 for more information) and import rules from other projects (see How to Import a Rule on page 85 for more information).

ID	Rule Name	Source	Target	Rule Set Name	Created By	Last Executed	Last Executed By
☐ 3396	Import to Recode	Delimited Text File	Confirmit Survey Database		Sjerke, Monica	10/02/2010 09:18:08	Bjerke, Monica
☐ 3395	Doc5	Confirmit Survey Database	Delimited Text File		AppleAdmin, Adam		
☐ 3360	test_dc_proj	DataCentral	DataCentral		ProS, Natalia	09/02/2010 16:12:21	ProS, Natalia
☐ 3343	CR39382	DataCentral	DataCentral		ProS, Margarita	09/02/2010 12:18:16	ProS, Margarita
☐ 3329	verify41200	Confirmit Survey Database	Triple-S Data File		Kvensjø, Lars		
☐ 3326	tm	DataCentral	DataCentral		Admin, Thomas	09/02/2010 10:13:43	Admin, Thomas

Figure 92 Example of the Rule List

Click on a Rule Name link to open the Current Rule page for that rule (see Current Rule on page 40 for more information). The selected rule becomes the Current Rule (and will open every time you go to the **Data Processing > Current Rule** menu command) until you return to the Rule List and select a different rule or until you close the current Confirmit session.

In the event the list of rules is extensive, add search criteria to the various search fields then click **Search** to reduce the list to manageable proportions. You can also search by date. Click **Reset** to remove all input search criteria and display the full list.

2.4.1. How to Create a New Rule

1. When in the Rule List page, click the **New Rule** Button towards the right end of the Rule List toolbar.
The Add New Panel Rule form opens at the General tab. Note that until you have named and saved the new rule, the other tabs in the form are inactive.

Figure 93 The Add New Rule page

2. In the Rule Name field, type in a name for your new rule.
3. Type a comment/description into the Comment field so others can see what this rule is intended for.
4. Select the required Source and Target types.
5. Select the desired Status for the rule (see The General Tab on page 41 for more information).
5. On completion, click **Save**.

The new rule is saved and will now appear in the Rules List. The system allocates a Rule ID to the new rule, and this ID is displayed towards the top of the form. The Source, Action, Target and Permissions tabs become active. Go to these tabs and set up the rule as required.

2.4.2. How to Import a Rule

You can copy rules to other servers by using the Rule Export functionality (see How to Export a Rule on page 43 for more information). Proceed as follows to import a rule into the current server once it has been exported from another.

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

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

The Rule Import dialog opens.



The Rule Import dialog box has a blue title bar with the text "Rule Import". Below the title bar, there are two main sections. The first section is labeled "File to upload" and contains a text input field followed by a "Browse..." button. The second section is labeled "Rule Name" and contains a text input field. At the bottom right of the dialog, there is an "OK" button.

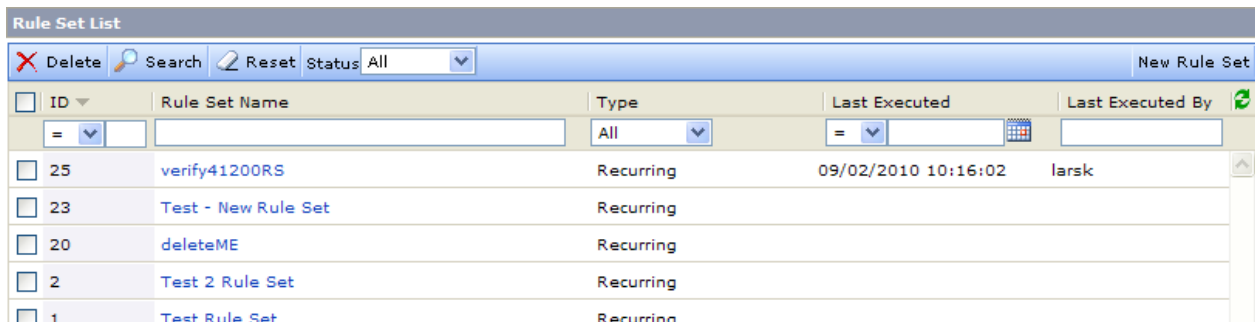
Figure 94 The Rule Import dialog

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

The rule is imported and added to the Rule List. Click on the blue **Rule Name** link to open the rule in the Current Rule window (see Current Rule on page 40 for more information).

2.5. Rule Set List

A Rule Set is a number of rules that are to be run consecutively. The rules are run in the order in which they are listed in the set. Go to the **Data Processing > Rule Set List** menu command to display a list of the rule sets available to you.



The Rule Set List window has a blue title bar with the text "Rule Set List". Below the title bar, there is a toolbar with buttons for "Delete", "Search", "Reset", and a "Status" dropdown menu set to "All". On the right side of the toolbar, there is a "New Rule Set" button. Below the toolbar, there is a table with the following columns: "ID", "Rule Set Name", "Type", "Last Executed", and "Last Executed By". The table contains five rows of data.

ID	Rule Set Name	Type	Last Executed	Last Executed By
25	verify41200RS	Recurring	09/02/2010 10:16:02	larsk
23	Test - New Rule Set	Recurring		
20	deleteME	Recurring		
2	Test 2 Rule Set	Recurring		
1	Test Rule Set	Recurring		

Figure 95 Example of the Rule Set List

Click on a blue **Rule Set Name** link to select that rule set and open the Current Rule Set window (see Current Rule Set on page 78 for more information).

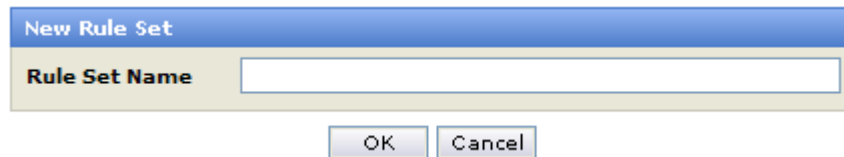
In the event the list is extensive it may cover several pages. In this case, the **Page** arrows in the lower-right corner of the page will be active. Click the arrows to move to other pages. Add search criteria to the various fields above the columns to find the task you are interested in (refer to the Authoring User Guide for more information). Click **Reset** to remove all input search criteria and display the full list.

In the Rule Set List window you can also create new rule sets.

2.5.1. How to Create a New Rule Set

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

The New Rule Set dialog opens.



The dialog box is titled "New Rule Set". It contains a single text input field labeled "Rule Set Name". Below the input field are two buttons: "OK" and "Cancel".

Figure 96 The New Rule Set dialog

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

The rule set is added to the list.

Click on the blue **Rule Set Name** link for the rule set to select it and open the Current Rule Set window (see Current Rule Set on page 78 for more information). Here you set up the rule set properties and add rules.

2.6. Data Central Project List

The Data Central Project List lists the Data Central projects currently available to you. When you select this menu, the page opens as shown below.

✖ Delete 🔍 Search 🔄 Reset Import Data Central Project			
☐ Id	Project Name	Created By	Created
=			=
☐ 146	clean project	margaritam_pros	10/02/2010 10:51:51
☐ 145	Project1mm1	margaritam_pros	10/02/2010 10:12:38
☐ 144	test_dc_proj	NataliaC_pros	09/02/2010 16:10:12
☐ 143	CR39382	margaritam_pros	09/02/2010 12:16:18
☐ 142	Project3	DmitryK_pros	04/02/2010 17:26:49
☐ 141	test spss outputs with...	mikhailg_pros	03/02/2010 17:46:01
☐ 140	test spss outputs	mikhailg_pros	03/02/2010 17:41:28
☐ 139	test 5 outputs	mikhailo pros	03/02/2010 17:35:57

Figure 97 Example of the Data Central Project List

On this page you can search for and open a desired project, import Data Central Projects, and delete them if required. Left-click on a blue Project Name link or right-click on it and select **View Details** to open the Details page for the project, and right-click and select **Create New Rule** to create a new Data Central rule.

In the event the list is extensive it may cover several pages. In this case, the **Page** arrows in the lower-right corner of the page will be active. Click the arrows to move to other pages. Add search criteria to the various fields above the columns to find the task you are interested in (refer to the Authoring User Guide for more information), or click a "letter button" (located across the lower frame of the window) to display only those rules where the project name begins with that letter. Click **Reset** to remove all input search criteria and display the full list.

2.6.1. Data Central - General Description

Confirmit Data Central is a desktop application that brings together all of the activities that can take place after data has been collected, but before it has been reported. These activities include data and metadata definition and manipulation, cleaning and recoding, reformatting, streaming, weighting, and exporting.

Note: The Data Central application is a chargeable add-on for Confirmit Authoring. For more detailed information about Data Central, refer to the Data Central User Guide which accompanies the application.

2.6.2. The Data Central Project Details Page

When you click on a Data Central project link in the project list, the Project Details page opens at the general tab as shown in the example.

The screenshot shows the 'General' tab of the Data Central Project Details page. At the top, there is a navigation bar with buttons: Back, Save, Export Data Central Project, and Create New Rule. Below this, there are three tabs: General (selected), Details, and Permissions. The main content area displays the following information:

ID	171
Name	demo3_cleaning
Title	
Description	
Created Date	02/12/2008 18:27:47
Created By	margenitem_proc
Modified Date	02/12/2008 18:36:12
Modified By	margenitem_proc

Figure 98 Example of the Data Central Project details page

This tab provides general details for the rule, such as its name, title and description, and the created and modified information (not editable).

2.6.3. The Details Tab

The Details tab shows the input and output details of the rule. This information is read-only on this tab.

The screenshot shows the 'Details' tab of the Data Central Project Details page. At the top, there is a navigation bar with buttons: Back, Save, Export Data Central Project, and Create New Rule. Below this, there are three tabs: General, Details (selected), and Permissions. The main content area displays a table with the following data:

Type	Name	Title	Language	Description
Input	confirmit	p0145332	p0145332	
Output	sav	Survey1	Copy of p0145332	

Figure 99 Example of the Details tab

Note that more than one source and/or target can be specified (see How to Create a New Data Central Rule on page 90 for more information).

The detail columns are as follows:

- **Type** - the data type of file specified as input and output for the data (source and target) to be processed by the rule.
- **Name** - the name of the projects/files specified as the data source and target.
- **Title** - if the source and/or target files have been given titles, these are listed in this column.
- **Language** - if the project is multilingual, then project languages are listed here.
- **Description** - the project description.

2.6.4. The Permissions Tab

The "owner" of a project - the user who creates or imports a Data Central project - has full administrator rights to that project. Initially, all other users (except administrators) have no rights; they cannot even see the project in their Data Central Project List (see Data Central Project List on page 87 for more information) until the "owner" has allocated the appropriate rights to them. The Data Central Project Permissions tab allows the creator to allocate access rights to the project he/she has created/imported, to the various other users in the company. The tab lists all the users currently registered in your company and others who may have been added to the list.

User Name	Last Name	First Name	Permission Type
acestero	Cestero	A.J.	Administrate
ACL	dfs	sf	None
addmodify1_mb	Jalla	Jo	None
addmodify2_mb	Jalla	Jo	Read
addmodify3_mb	Jalla	Jo	None
addmodify4_mb	Jalla	Jo	None
addmodify5_mb	Jalla	Jo	None
adm	d	a	None
adm_mar	m	a	None
administrator	Svstem	Admin	None

Figure 100 Example of the Permissions tab

In the event the list is extensive it may cover several pages. In this case, the **Page** arrows in the lower-right corner of the page will be active. Click the arrows to move to other pages. Add search criteria to the various fields above the columns then click **Search** to reduce the list to manageable proportions. Click **Reset** to remove all input search criteria and display the full list.

For each user listed, click the down-arrow in the Permission Type column and select the appropriate permission. On completion, save the changes.

If all the employees in your company are to have the same permission level for the project, select the permission level from the drop-down list towards the right end of the Search toolbar, then click **Grant All**. All employees will then be given the selected permission.

2.6.5. How to Create a New Data Central Rule

Note: You can export and import Data Central rules using the same procedures as for "standard" rules. Go to [How to Export a Rule](#) and [How to Import a Rule](#) for further details.

There are two ways of creating a new Data Central rule; you can open a project from the Project List and create a new rule in that project, or you can go to the Rule List and create a new Data Central rule, then attach it to a project.

To create a new Data Central rule:

1. Go to the **Data Processing > Data Central Project List** menu command.
The Project List opens.
2. Click on the blue Project Name link for the project you wish to create the new rule for, to open that project.
The Data Central Project Details page opens at the General tab.
3. In the Project Details page toolbar, click **Create New Rule**.
The Rule Details page opens at the General tab (see The General Tab on page 92 for more information). The Rule Name field is by default filled in using the name of the project for which you are creating the rule, and the Email field (the email address to which any emails concerning this rule will be sent) will by default contain the address of the current user (your address). The page also indicates to which Data Central project the rule belongs, when the project was last modified, and when the rule itself was last updated.
4. Edit the editable fields as necessary then click **Save** the save the changes.
5. When you have set up the required details here, go to the Source tab to set up the source data (see The Source Tab on page 94 for more information).
6. Select the project that is to be the source for the data.
This is filled in automatically according to the specifications in the Data Central project (input data source used).
7. If you wish to try the rule using test data before going "live" on the real data, check the Use Test Database box.
8. Check the appropriate filter boxes to select the respondent statuses you wish to be used in the rule (the Complete filter is set by default).
9. If you wish to restrict the dates from which the data is to be extracted, check the Date Filter box and set the associated date limits (all data is selected by default).
10. If you wish to restrict the number of columns that are to be used, click the radio button and select the columns as appropriate.

Note: You must ensure that the columns used in the Data Central project, exist in the rule.

11. If the project is multi-language, select the language data you wish to use.
12. Click **Save** then go to the Target tab (see The Target Tab on page 96 for more information).
Depending on the specified outputs in the Data Central project, one or more Target entries will be available. You can click on each of these entries and edit them as necessary.
13. Select the project that is to be updated or select to create a new project.
14. Select the changes that are to be made, whether or not the project's Test database is to be updated, and the execution mode.
If the target Type is a report or an external output file (for example Quantum files), specify whether the file is to be sent via email or stored on the FTP server, and you can choose whether the file is to be encrypted.
Click **Save** then go to the Permissions tab.
15. Set up the permissions for the new rule as required (see The Permissions Tab on page 99 for more information).

16. Click **Save**.

You can now test the rule to check that it is set up correctly.

2.6.6. How to Export a Data Central Project

A Data Central project can be exported to Data Central Desktop:

1. Go to the **Data Processing > Data Central Project List** menu command.
The Project List opens.
2. Click on the blue project link for the project you wish to export, to open that project.
The Data Central Project Details page opens at the General tab.
3. In the Project Details page toolbar, click **Export Data Central Project**.
The Data Central Project Export dialog opens.

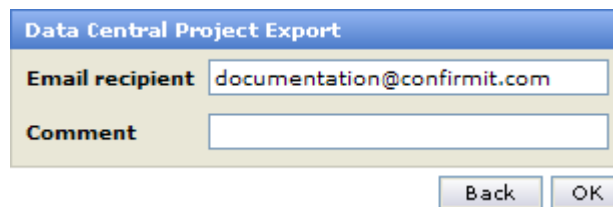


Figure 101 The Project Export dialog

4. The address given in the Email Recipient field will by default be that of the current user - you. If you wish to export the project to a different pc, type the appropriate address into the field.
5. Type a comment into the Comment field as required.
This comment will be included in the email, and is intended to assist you (or another recipient) with later identification of the email.
6. Click **OK**.

The task is run; the project file is attached to an email and the email is sent to the specified recipient.

When the recipient receives the email with the project file attached, he/she can save the attachment in a suitable archive and open it with Data Central Desktop.

2.6.7. How to Import a Data Central Project

In the event you have no direct access to the Confirmit platform, you may need to import a Data Central project into your pc so that you can view or edit the project. To import a project:

1. Go to the **Data Processing > Data Central Project List** menu command.
2. In the Data Central Project List page, click the **Import Data Central Project** button (located towards the right end of the list toolbar).
The Data Central Project Import dialog opens.

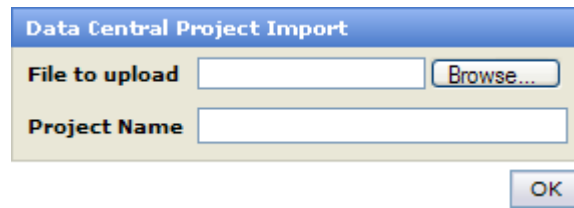


Figure 102 The Data Central Project Import dialog

3. Click the **Browse** button to open a file browser, find the project file you wish to import, and select it.
The file must have the extension **.dcps**.
4. Type a suitable name for the project into the Project Name field.
5. Click **OK**.

The project is imported and added to the Data Central Project List. You can now create new rules for the project, and if you have the Data Central application installed then you can edit the project.

2.6.8. The Create New Data Central Rule Tabs

When you click the **Create New Rule** button, the Rule Details page opens. This page has four tabs, opening at the General tab.

- The General tab.
- The Source tab.
- The Target tab.
- The Permissions tab.

See the following sections for descriptions of the tabs and their properties.

Note: The properties available on the Source and Target tabs will depend on the settings in the Data Central project when the rule was created.

2.6.8.1. The General Tab

When you create a new Data Central rule (see How to Create a New Data Central Rule on page 90 for more information), the Rule Details page opens at the General tab.

Save Duplicate Execute Export Rule	
General Source Target Permissions	
Rule ID	3436
Rule Name	Project1mm1_test_rule
Comment	
Source Type	
Target Type	
Status	☒ Enabled ☐ Disabled
Email	Documentation@confirmit.com
Created Date	10/02/2010 12:35:36
Created By	nigelb_admin
Data Central Project	Project1mm1 (145)
Data Central Project Modified	10/02/2010 10:12:38
Rule Last Updated	10/02/2010 12:35:36

Figure 103 The Rule Details page - General tab

The properties and fields are as follows:

- **Rule ID** - the identification number of the new rule. This is generated automatically by the system and cannot be changed.
- **Rule Name** - by default this is the same as the name of the Data Central project for which the rule is being created. Edit this as required.
- **Comment** - add any comments you wish to make about this rule, to simplify identification later.
- **Status** – select the required status for the rule. The options are:
 - o **Enabled** – select to allow the rule to be run “as required”. This is the default setting.
 - o **Disabled** – select this option if you wish to prevent the rule from being run. This could be useful if you have a recurring task, and wish to stop using this rule in that task for a period but do not wish to change the task permanently.
- **Email** - this is the email address to which any emails concerning this rule will be sent (for example if you export the rule). The email address given will by default be that of the current user (your address).
- **Created Date** - the date the rule was created.
- **Created By** - the user name of the person who created the rule (probably yours).
- **Data Central Project** - the name and ID of the Data Central project for which the rule is being created (the current project).
- **Data Central Project Modified** - the date and time when the project was last modified.
- **Rule Last Updated** - the date and time for when this rule was last updated.

2.6.8.2. The Source Tab

When you create a Data Central rule, you must specify a source for the data on which the rule is to operate. Use the fields on this tab to specify the data source on which the rule is to operate.

Note: The properties available on the Source tab will depend on the settings in the Data Central project when the rule was created.

2.6.8.2.1. The Properties when the Source is a Project

When you create a Data Central rule and the source is a project, the properties list is as shown below.

The screenshot shows the 'Source' tab of a configuration window. At the top, there are buttons: Back, Save, Duplicate, Execute, and Export Rule. Below these are tabs: General, Source (selected), Target, and Permissions. On the left, a table lists sources:

Source Name	Source Type
Confirmit	confirmit

The main area contains the following fields and controls:

- Project ID:** A text input field with a 'Select project' button.
- Use Test Database:** A checkbox.
- Interview status filter:** A group of checkboxes: Complete Responses (checked), Incomplete Responses, Screened, Quota Full, Error, and All (unfiltered) (radio button).
- Expression:** A text input field with an 'Edit...' button.
- Date Filter:** A checkbox, a 'Start Date' field with a calendar icon, and an 'End Date' field with a calendar icon.
- Data to be included:** A dropdown menu set to 'All Data' with a help icon. Below it, text says '(Only applies to recurring tasks)'.
- Columns:** A group of radio buttons: All Columns (no filter) (selected), Select... (no filter column selected) Select columns, and Survey Data Template.
- Text in Question Labels:** A dropdown menu set to 'Question ID'.

Figure 104 The properties when the source is a project

The properties and fields are as follows:

- **Source Name** - all sources are listed here. These sources can be either Confirmit projects or external data sources.
- **Source Type** - the type of project.
 - If the Source Type is an external file:
 - o **File Transfer** - select this if the file is to be uploaded or picked up from the FTP server, and select the individual files.
 - If the Source Type is a Confirmit project:
 - o **Project ID** - this field shows the project ID of the project that is to be used as the data source. You can change to a different project by clicking **Select Project**.
- **Use Test Database** - check if you wish to test the rule using data from the project's Test database.

- **Interview Status Filter** - check the appropriate boxes to specify which categories of response data are to be used.
 - o **Complete responses** – selects only data from surveys with the status Complete.
 - o **Incomplete responses** – selects only data from surveys with the status Incomplete.
 - o **Screened** – selects only data from surveys with the status Screened.
 - o **Quota full** - selects only data from surveys with the status Quota Full.
 - o **Error** - selects only data from surveys with the status Error.
- **Expression** - here you can create an expression to filter the data that is to be manipulated by the rule. Click **Edit** to open the Expression Editor window (see The Expression Editor Window on page 100 for more information).
- **Date Filter** - check to activate the data filter, then specify the start and end dates for the data to be used by the rule.
- **Data to be included** - in the event the rule is recurring, you can instruct the rule to process all the data specified by the filters above, or only the data that has changed since the previous time the rule was run.
- **Columns** - select the columns you wish to include;
 - o **All columns** - use all columns.
 - o **Select** - use only the selected columns - click the **Select Columns** button to open a selection dialog.
 - o **Survey Data template** - as used in the selected template.
- **Selected Language** - if the project supplying the data has more than one language selected, select the language to be used.
- **Text in question labels** - select the type of question labels you wish to use. The options are:
 - o **Text Only** - the label element will contain only the text of the question.
 - o **Title Only** - the label element will contain only the title of the question.
 - o **Title and Text** - the label element will contain the question title followed by the question text.
 - o **Question ID** - the label element will contain the question id.

2.6.8.2.2. The Properties when the Source is a File

When you create a Data Central rule and the source is a file, the properties list is as shown below.

Note: The properties available depend on the File Transfer type selected. This page lists all available properties.

The screenshot displays the 'Source' tab in the Confirmit Horizons 23 Data Processing User Guide. The interface includes a top navigation bar with buttons: Back, Save, Duplicate, Execute, and Export Rule. Below this, there are four tabs: General, Source (selected), Target, and Permissions. The 'Source' tab is divided into two main sections. On the left, there is a table with two columns: 'Source Name' and 'Source Type'. The table contains one entry: 'Survey1' with 'sssxml' as the source type. On the right, there are several configuration fields. The 'File Transfer' dropdown is set to 'External FTP'. Below it, there is a checkbox for 'Use SFTP (SSH File Transfer Protocol)'. The 'Folder name' field is empty. The 'Host name[:Port]' field is empty. The 'User name' field is empty. The 'Password' field is empty. There is a 'Verify connection' button and a 'Not tested' status indicator. The 'File handling' section has two radio buttons: 'Remove files from server after import' (selected) and 'Leave files on server'. The 'Schema File (.qdd/.zip)' field is empty. The 'Data File (.dat/.zip)' field is empty.

Figure 105 The properties when the source is a file

The properties and fields are as follows:

- **File Transfer** - import files can be uploaded directly in the browser, placed on a Confirmit FTP server and retrieved from there, or imported from an external FTP server. The remaining properties will depend on which file transfer method you use:
- **Use SFTP** - select this option if you wish to use protected protocol SFTP (SSH File Transfer Protocol). Note that this option can be preset as a company setting, in which case it will be grayed out and will not be "deselectable".
 - o **Local file** - if you wish to upload the source file from your server network (perhaps the file has been stored there after having been sent to you via email), then select this option, click the Upload File link in the line below, then click Browse. A standard browser window opens, in which you can search for and select the file you wish to upload.
 - o **FTP** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then fetch the source file from Confirmit's FTP location. Type in the file name. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed.
 - o **External FTP** - files can be taken from an external FTP location. In this case the file name, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct.
- **File handling** - select whether you wish to copy the file from the server/FTP site or move it (delete it from the site).
- **Schema File / Data File** - type in the file names of the files you wish to use.

2.6.8.3. The Target Tab

Use the Target tab to select the target for the data defined in the Source tab (see The Source Tab on page 94 for more information), or if external files are to be used, specify how the files are to be delivered (email or FTP).

The Target Types listed in the tab's left column are those defined in the specific Data Central project. Any number of outputs can be defined for a project, and these outputs can include data files, reports and log files. Data files can be SPSS, Quantum, SSSXML, SAS or Transposed. The properties available in the Target tab will depend on the Target Type (data file, report or log file), then if Data file, the type of data file, and then the File Transfer type selected.

2.6.8.3.1. The Target Tab when the Target is a Project

Use the Target tab to select the target for the data defined in the Source tab (see The Source Tab on page 94 for more information), and specify how the files are to be delivered.

The Target Types listed in the tab's left column are those defined in the specific Data Central project. Any number of outputs can be defined for a project, and these outputs can include data files, reports and log files. The properties available in the Target tab will depend on the type of output selected. This section describes the options available when the target is a project.

The screenshot shows the 'Target' tab in the Confirmit Horizons 23 Data Processing User Guide. The interface includes a toolbar with buttons for Back, Save, Duplicate, Execute, and Export Rule. Below the toolbar are tabs for General, Source, Target, and Permissions. The 'Target' tab is active, displaying a table with two columns: 'Target Name' and 'Target Type'. The table contains one entry: 'Survey2' with 'confirmitPackage' as the target type. To the right of the table, there are several configuration options: 'Data Destination' is set to 'Survey Database'; 'Project' is selected with a radio button, and there is a 'Select project' button; 'Create New' is also a radio button option; 'Incremental Updates' is an unchecked checkbox; 'Apply Schema Changes' is an unchecked checkbox; 'Update BitStream Files' is a checked checkbox; 'Use Test Database' is an unchecked checkbox; 'Execution Mode' is set to 'Append Data' in a dropdown menu; and 'Variables to Include (Survey data template)' is an unchecked checkbox with a 'Select template' button.

Figure 106 The Target tab when the target is a project

The data fields and options are as follows:

- **Data Destination** - when the selected target is a Confirmit project, the processed data can be sent to:
 - o **BitStream Files** - BitStream files are generated.
 - o **Survey Database** - a new project database is generated.
- **Project** - if you wish to use an existing project as the target, select this option and type in or select the project to be used.
- **Create New** - if you wish to create a new project to be the target, select this option. This option is selected by default when generating a new rule.
- **Incremental Updates** - only changed or new responses for the survey (since the rule was last executed) will be included.
- **Apply Schema Changes** - check this option if wish to merge schema changes into the target survey (note that it is not possible to merge hierarchical/loop changes).
- **Update BitStream Files** - check this box if you also wish to merge schema changes into the BitStream files.
- **Use Test Database** – check this box if you are testing the setup and wish to send the data to the test database.
- **Execution Mode** - select how the data is to be added to the target database.
 - o **Append Data** - any records in the source that do not exist in the target survey database will be added to the target survey database. Any records in the source that already exist in the target survey database will be ignored.
 - o **Update Data** - any records in the source that already exist in the target survey database will be updated with values from the source. Any records in the source that do not already exist in the target survey database will be ignored.
 - o **Merge data** - all the data from the source will be added to the target survey database. Any records in the source that already exist in the target survey database will be updated, and any records in the source that do not currently exist in the target survey database will be added to the target survey database.

- **Variables to include** - if for example you have a Confirmit project which is to be processed in Data Central (perhaps you wish to perform a cleaning operation), the result after execution of the DC rule will be a new Confirmit project which contains the changes specified by the rule. If in addition you wish to specify the order of the questions or the column positions in this new project, you cannot do both within the rule. However you can build a template to choose the subset of data fields for your exports and arrange the columns (see How to Create a New Template on page 6 for more information), and then apply this template to the target. Check this box, then select the template you wish to use. Three template types are supported: Simple (Delimited), Fixed width and Punch card (see Template Types on page 3 for more information).

2.6.8.3.2. The Target Tab when the Target is a File

Use the Target tab to select the target for the data defined in the Source tab (see The Source Tab on page 94 for more information), and specify how the files are to be delivered (email or FTP).

The Target Types listed in the tab's left column are those defined in the specific Data Central project. Any number of outputs can be defined for a project, and these outputs can include data files, reports and log files. Data files can be SPSS, Quantum, SSSXML, SAS or Transposed. The properties available in the Target tab will depend on the type of data file and then the File Transfer type selected.

Figure 107 The Target tab when the target is a file

Note that the rule in the example is set up with two targets (in the left column). The SSSXML file type is currently selected, so the properties in the area to the right apply to that package. If you select the "transposed" file as the target type, the properties available will change.

- **File Transfer** - files can be transferred by email, placed on a Confirmit FTP server and retrieved from there, or imported from an external FTP server. The remaining properties will depend on which file transfer method you use:
 - o **Email** - sends an email. The files' default names are given in the Schema File and Data File fields; edit these if necessary.
 - o **FTP** - if your company has licensed the FTP add-on and it has been enabled, this option will be active. You can then send the file to Confirmit's FTP location. The files' default names are given in the Schema File and Data File fields; edit these if necessary. Confirmit's FTP address is specified as part of the enabling procedure and cannot be changed.

- o **External FTP** - the files can be sent to an external FTP location. The files' default names are given in the Schema File and Data File fields; edit these if necessary. In this case the, Folder Name (at the external FTP location), the Host Name, and the FTP User name and Password must be specified. The **Verify connection** button is provided to allow you to check whether the FTP settings are correct.
- **Encrypt file** - File transfer encryption functionality makes it possible to export data from Confirmit in a secure way. The encrypted files can then be either ordered by email or sent to the FTP server for downloading. The users will have to decrypt the files using their private PGP encryption keys. Refer to the user manual for further information. The setting will be disabled on the following cases:
 - o Encryption is enforced due to company settings.
 - o The public encryption key is missing.
- **Variables to include** - if for example you have a Confirmit project which is to be processed in Data Central (perhaps you wish to perform a cleaning operation), the result after execution of the DC rule will be a new Confirmit project which contains the changes specified by the rule. If in addition you wish to specify the order of the questions or the column positions in this new project, you cannot do both within the rule. However you can build a template to choose the subset of data fields for your exports and arrange the columns (see How to Create a New Template on page 6 for more information), and then apply this template to the target. Check this box, then select the template you wish to use. Three template types are supported: Simple (Delimited), Fixed width and Punch card (see Template Types on page 3 for more information).
- **Use SFTP** - select this option if you wish to use protected protocol SFTP (SSH File Transfer Protocol). Note that this option can be preset as a company setting, in which case it will be grayed out and will not be "deselectable".

2.6.8.4. The Permissions Tab

The user who creates a Data Central rule has full administrator rights to that rule. Initially, all other users have no rights; they cannot even see the rule in their rule list, until the creator has allocated the appropriate rights to them. The New Rule Permissions tab allows the creating user (you) to allocate access rights to the rule you are creating, to the various other users in the company. The tab lists all the users currently registered in your company and others who may have been added to the list.

The screenshot displays the 'Permissions' tab within the 'Rule Details' page. At the top, there is a navigation bar with buttons: 'Save', 'Duplicate', 'Execute', 'Validate Action Script', and 'Export Rule'. Below this, a tabbed interface shows 'General', 'Source', 'Target', and 'Permissions' tabs, with 'Permissions' being the active tab. The 'Permissions' section includes a search bar, a 'Source' dropdown menu set to 'Own company', and a 'Grant All' button. A table lists users with columns for 'User Name', 'Last Name', 'First Name', and 'Permission Type'. The table contains several rows of user data, all with 'None' as the permission type. A vertical scrollbar is visible on the right side of the table.

User Name	Last Name	First Name	Permission Type
acestero	Cestero	A.J.	None
administrator	admin	istrator	None
alexa	Ager	Alex	None
alexanderil	Ilyichov	Alexander	None
AlexanderL	Lukyanov	Alexander	None
AlexanderL_pros	ProS	Alexander	None
AlexanderM	Melnikov	Alexander	None
AlexanderM_pros	ProS	Alexander	None
AlexanderMu	Murzin	Alexander	None

Figure 108 The Rule Details page - Permissions tab

1. For each user to whom you wish to allocate a permission, click the down-arrow in the Permission Type column to open the drop-down list of options.

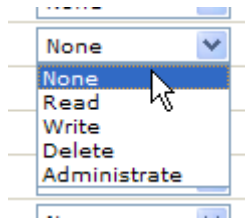


Figure 109 The permission allocation drop-down

2. Select the appropriate permission.

The list closes and the selected option is added to the Type field.

3. On completion, save the changes.

The user names are listed 30 to a page. Sort the list by clicking on the column headers. Move to the next or previous pages in the list by clicking the Page arrows in the lower right corner of the list window. In the event the list of users is extensive, you can add search criteria to the various search fields then click **Search** to reduce the list to manageable proportions.

If all the employees in your company are to have the same permission level for the project, select the permission level from the drop-down list towards the right end of the Search toolbar, then click **Grant All**. All employees will then be given the selected permission.

2.7. The Expression Editor Window

Several of the dialogs within the Data Processing rules include an Expression field. This field allows you to create a filter expression such that only the data you require is included in the rule.

For example, say you would like to export only the records of female respondents. Assuming you have a question in the survey "What is your gender?", with the answer options Male=1 and Female=2, you can generate an expression such as gender=2. When the rule is executed, the expression would remove any respondents with gender anything other than 2 from the data set. I.e. all males (with gender=1) would be removed, leaving only females.

You have two options when creating an expression; you can type the expression directly into the Expression field (on completion click **Validate** to check your code), or you can use the Expression Editor to assist you. To create an expression using the editor:

1. Click the **Edit** button located beside Expression field.

The Expression Editor window opens.

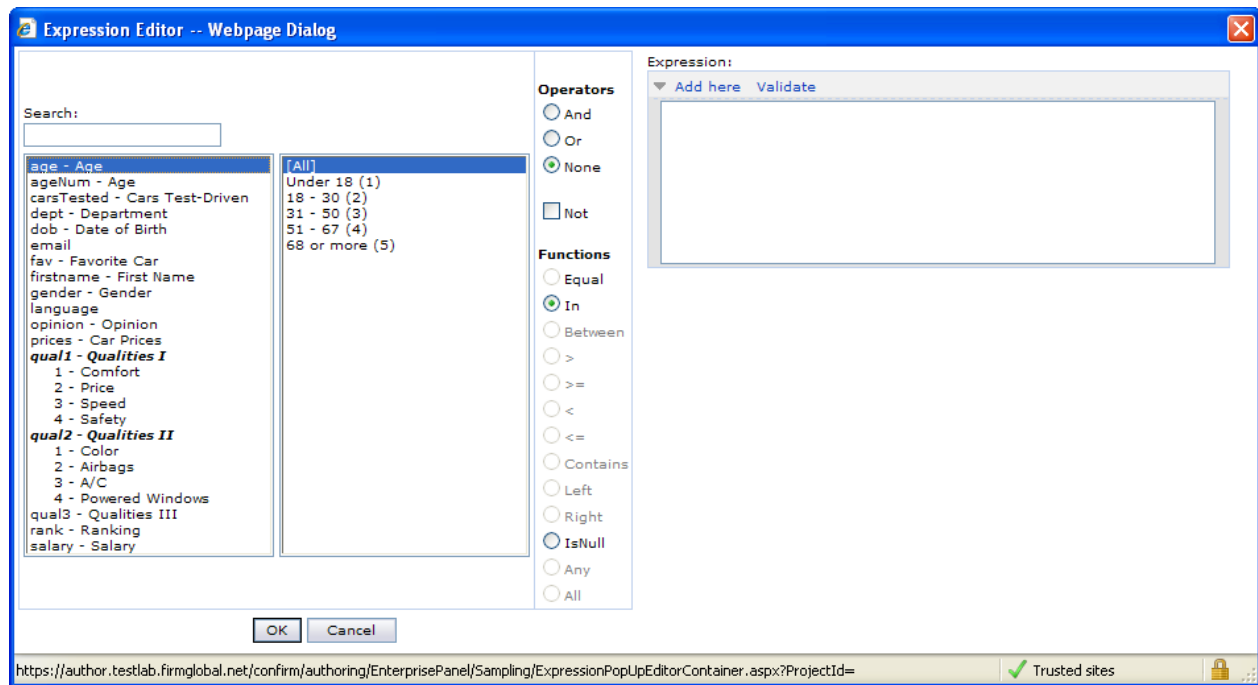


Figure 110 Example of the Expression Editor window

2. In the left column, search for or browse to the variable you wish to start your expression with, and click on it to select it.

The Values or Parameters (depending on the variable type selected) that apply to the variable will be listed in the second column.

Note: The status, respid, responseid, interview_start, interview_end and CatiExtendedStatus system variables will not be displayed in the list, but they can nevertheless be used in the expression. The syntax varies depending on the type of the variable. For example, the CatiExtendedStatus variable is numeric so it will typed as CatiExtendedStatus=13.

3. Click on the required Value/Parameter to select it.
4. Select the radio button for the **None** operator (you cannot start an expression with the operators **And** or **Or**), and check the **NOT** box if required.
5. Select the appropriate function and type any text or values into the Text or Number fields as required.
6. Click **Add Here** to add the criteria to the Expression field.
Note that the coding is displayed in the white text field and the expression is “written” below the field in full with colors to denote the functions.
6. Select and add criteria until you have the required expression.
7. On completion, click **OK** to apply the expression to the Expression field in the Rule Details pane and close the Expression Editor window.
8. Click **Save** to save the changes.

The expression is now part of the rule and will be used to filter the data as appropriate.

3. Data Processing Scripting

Confirmit uses JScript .NET as its scripting language. The functions and methods available allow you to perform typical Data Processing tasks.

When the script is executed, the values are accessed and updated on a record by record basis. For example, the script is applied to all variables for the first respondent, then applied to all variables for the next respondent, and so on.

Refer to [http://msdn.microsoft.com/en-us/library/x85xxsf4\(VS.71\).aspx](http://msdn.microsoft.com/en-us/library/x85xxsf4(VS.71).aspx) for the full Jscript.NET. documentation. The Confirmit scripting manual provides a good introduction to Jscript.NET, however you should note that the scripting manual also covers a number of Confirmit-specific functions and objects. These are specific to scripting inside surveys only, and cannot be used in Data Processing scripts.

3.1. Data Types

In Action scripts you do not have to call a particular function to work with the survey variables, but can use the question IDs as variables directly. The survey variables are given below in bold text.

The following .Net Framework and JScript.NET data types are used for the various question types (note that for some there are differences between the Optimized and Legacy Database Formats):

- **Open text variables** (open text questions, other specify, multi open text) - String.
- **Single questions** and elements of **grids**:
 - o Legacy Database Format - String
 - o Optimized Database Format - Depends on the codes of the answer lists:
 - If the codes are numeric:
 - For codes up to 255 - byte
 - For codes up to 32767 - short
 - For codes up to 2147483647 - int
 - For codes up to approximately 10^{19} - long
 - If the codes include non-numeric characters - String
 - For boolean single questions - boolean
 - o Elements of normal **multi** questions:
 - o Legacy Database format - String
 - o Optimized Database format - boolean
- Numeric questions (open numeric, elements of multi numeric) - Decimal
- Date questions (Optimized Database Format only) and date system variables (interview_start etc. on both database formats) - DateTime

3.2. Available Functions

Below is a list of the functions available in Data Processing:

Function	Description	Example
AddLogError(string message)	Adds an error message to the task log, highlighted with red error icon.	AddLogError("Error");
AddLogMessage(string message)	Adds a message to the task log, highlighted with information icon.	If (Gender == "female") { AddLogMessage("female found");

		}
AddLogWarning(string message)	Adds a warning to the task log, highlighted with question mark icon.	AddLogWarning("Warning!");
Average(object[] values)	Returns the average of the specified values.	var avg = Average("10",15, Field1); if (avg >= 15.2) { MyAverageVariable = avg; }
CleanLoopRecords(string variableId)	Sets the value of the specified variableId to NULL for all answers in a question variableId with loop reference answerlist.	CleanLoopRecords("m1");
CurrentResponseId()	Returns an int containing the responseId of the current record.	If (CurrentResponseId() > 10) Gender = "female";
DeleteCurrentResponse()	Permanently deletes the current response record from the survey database. Note: Survey database (same project) must be selected as Source and Target in the Data Processing rule, a filter must be applied in the Source Tab, and "Delete Data" must be selected as Execution Mode in the Target tab.	DeleteCurrentResponse()
DeleteCurrentResponseAndRespondent()	Permanently deletes both the current response record from the survey database and the corresponding respondent record from the respondent database. Note: Survey database (same project) must be selected as Source and Target in a Data Processing rule, a filter must be applied in the Source Tab, and "Delete Data" must be selected as Execution Mode in the Target tab.	DeleteCurrentResponseAndRespondent()
GetAdditionalColumnValue(string key, string columnName, int schemaId, int tableId, int languageId (optional))	Will return the value, in the specified language (default language, if not specified), of the additional column from table tableId in database designer schema schemaId for the given key. GetAdditionalColumnValue can be used to get extra information for a given key. For example, Get County for a given ZipCode.	GetAdditionalColumnValue("10001","city",23,53,9)
GetCodes(string formName)	Returns the codes of the specified question where the question uses a normal answerlist. This is not supported for hierarchy and table lookup questions.	var multiQCodes = GetCodes("multiQ");
GetLookupId(string key, int schemaId, int relationId)	Returns the lookup Id from a relation relationId in database designer schema schemaId for the given key. Or null if not found.	var id = GetLookupId("bmw", 12, 23); CarId = id;
GetLookupLabel(string key, int schemaId, int relationId, int languageId)	Returns the lookup label from a relation relationId in database designer schema schemaId for the given key.	var label = GetLookupLabel("bmw", 12, 23, 20); CarLabel = label;
GetLookupValue(string key, int schemaId, int relationId, int languageId)	Returns a LookupValue object for the given key from a relation relationId in	var lv = GetLookupValue("bmw", 12, 23);

languageId (optional))	database designer schema schemaId. The objects label will be in the default language. If the key is not found, null is returned. The LookupValue object returned has Id and Label as properties.	CarLabel = lv.Label;
GetParentId(string key, int schemaId, int relationId)	When there is a relation with id relationId in a schema with id schemaId in Database Designer, GetParentId can be used to return the id of the parent of the item with id key. The function can be used both for relations between two different tables or a selfref (parent/child) within one table.	In a schema with schemaId 5, with a parentRel relation between (Employee=>Org) with relationId 34. And the table employee has id English parentRel jd John Doe rd And the table Org has id English rd R&D GetParentId ("jd", 5, 34) will return "rd"
GetQuestions()	Returns all questions which were selected as columns in the Data Processing rule.	
GetQuestionsByCategory(string category)	Returns all questions which have the question category specified as variable property and are selected as columns in the Data Processing rule.	var questions = GetQuestionsByCategory("NeedsCleaning");
GetQuestionsByType(QuestionType type)	Returns an array of QuestionInfo objects for all the questions of a specific type (Single, Multi, Grid, Numeric, Date, OpenText, OpenTextList, Ranking, NumericList). QuestionInfo objects has the following properties: string : Name, QuestionType : Type, string[] : Codes, string[] : Scale, string : Category	var questions = GetQuestionsByType(QuestionType.Numeric); for (var i = 0; i < questions.length; i++) { var value = GetValue(questions[i].Name); }
GetScale(string gridFormName)	Returns the scales of the specified Grid question.	var scaleGrid = GetScale("gridQ");
GetTableValue(string key, int schemaId, int tableId, int languageId (optional))	Will return the value of the key in the given language from table tableId in database designer schema schemaId (default language, if not specified). Returns string, or null if not found.	var answer = GetTableValue("8",4223,9);
GetValue(string fieldName)	Returns the value of the current respondent for a specified question.	var val = GetValue("singleQ"); var val = GetValue("multiQ_precode3");
IsNull(string fieldName)	Returns true if a variable doesn't have any data (null in the database), and false if not.	If (IsNull("Gender")) { Gender = "male"; }
IsTableKeyValid(string key, int schemaId, int tableId)	Will check if the given key exists in table tableId in database designer schema schemaId. Used to validate if a key specified on a respondent actually exists in the database table.	if (IsTableKeyValid("zip1245", 14, 255)) { MyEnglishZipCodeLabelVar = GetTableValue ("zip1245", 14, 255); //Uses default language, which in this

	Returns bool, true if key exists in table, false if not.	example is English MyNorwegianZipCodeLabelVar = GetTableValue ("zip1245", 14, 255, 20); }
SendMail(string from, string to, string subject, string bodyText, string CC, string bcc, int mailFormat, int bodyFormat, int codepage)	Function for sending an email. Parameters are: • from: Message sender address • to: Recipient's address • subject: Message subject line • bodyText: Message body • cc: cc address • bcc: bcc address • mailFormat: Deprecated, not in use • bodyFormat: Body format, where 0 = HTML, 1 = Plain text • codepage: Code page	SendMail("mymail@company.com", "yourmail@company.com", "Test email", "Can you read this?")?,,,1);
SetLoopRecord(string variableId, string iterationId, object value)	Adds or updates a loop record of current respondent with specified value for the specified variable in the specified loop iteration. The value used depends on the variable type. If the specified loop record already exists then it will be updated, if it doesn't yet exist it will be added – it is not possible to do both for the same respondent record in the same action script.	SetLoopRecord("m1", "iter2", true); SetLoopRecord ("s1", "iter1", "singleAnswer3");
SetNull(string fieldname)	Used to assign the null value to a variable.	If (!IsNull("Gender")) { SetNull("Gender"); }
SetValue(string fieldName, object value)	Sets the value of the current respondent for a specified question. Depending of the question type, the value needs to be set accordingly. Example: If a Multi question is used the value needs to either set to true or false, if a Numeric question is used a decimal value can be applied.	SetValue("singleQ","precode1"); SetValue("multiQ_2", true); SetValue("numericQ", 123.45); SetValue("dateQ", DateTime.Now);
SkipCurrentRecord()	Skips the record and moves to the next in the DP rule.	if (Gender="female") SkipCurrentRecord();
Weights(object[] fields)	Returns an array containing the weights for the given fields. The fields must be questions having a weighted answer list, otherwise the script will fail.	var weights = Weights(q1, q2, q3); var avg = Average (Weights);

Refer to the Confirmit Scripting manual for further information.

3.3. Working with Open Text Variables

In the following examples, an Open Text question as in q2 of the Car study is used.

The screenshot displays the configuration interface for an Open Text question. At the top, there are tabs for 'Text', 'Validation', 'Masking', 'Preview', and 'Res'. Below these, the 'Text-Mode' is set to 'Wysiwyg'. The 'Question ID' is 'q2'. A language dropdown menu is set to 'English'. Below the language menu, there are fields for 'Title' (containing 'Name') and 'Text' (containing 'Please enter your name').

Figure 111 Example of an Open Text question

Search for Open text answers

If you wish to search for specific names or character combinations in the question q2, you could use the following expression:

```
if (q2.Contains("name1")) { }
```

Using this example you would search for "name1" in variable q2. Inside the final brackets you would usually specify an action that would be performed if "name1" is found in a given answer. You could for example replace the found text with a different one, or set a value for another variable.

You can also search for specific texts at the beginning or end of a given answer:

```
if (q2.StartsWith("a") || q2.EndsWith("z")) { }
```

This expression would search for "a" at the beginning of the given answer and "z" at the end of the given answer.

Replace Open Text answers

If you would like to replace the given answer with a different text, you could use the following expression:

```
if (q2.Contains("name1"))
{
q2 = q2.Replace ("name1", "new name");
}
```

In this example, "name1" would be replaced by "new name".

3.4. Working with Open Text Numeric Variables

An Open Text Numeric question could for example ask for the respondent's salary:

Text Validation Masking Preview Results Languages

Text-Mode Wysiwyg

Question ID ? q9

English

Title
Income

Text
What is your income?

Instruction
Please enter a whole number without any spaces or separators

Figure 112 Example of an Open Text Numeric question

If you would like to check for an income higher than a certain amount, for example \$20000, you could write:

```
if (q9 > 20000) { }
```

Inside the brackets you must specify the action that should be executed if a respondent gives a higher income. If you would like to calculate for example a new income and overwrite the existing value:

```
if (q9 > 20000)
{
q9 = q9 * ( q9 / 33);
}
```

3.5. Working with Single Questions

Question q4 of the car survey asks for the respondent's age. The answer options are:

Text **Answers** Validation Masking Preview Results Language

Text-Mode Wysiwyg

? (Help on Precodes)

Delete Add Add Predefined Add Group Heading Add Group

	English	Precodes
☐	under 18	1
☐	18 to 30	2
☐	31 to 50	3
☐	51 to 67	4
☐	68 or older	5

Figure 113 The q4 answer options

If you wish to check whether a respondent selected “under 18” or “68 or older”, you would write the following:

```
if (q4 == "1" || q4 == "5") { }
```

In the event a respondent belongs to this group, you could for example order a recoding of the variable such that this record is flagged for further investigation.

```
if (q4 == "1" || q4 == "5")
{
  NeedsCheck = "2"; //Not ok
}
else
  NeedsCheck = "1"; //ok
```

In this example, the variable NeedsCheck would indicate whether a record needs further validation, and could be used as a filter to filter out those records.

3.6. Working with Multi Questions

Question q5 of the car survey is a Multi question that asks, “What cars have you test driven?”.

Figure 114 The q5 answer options

The codes on the cars here are 1,2,3,4,5,6 (in the order shown).

Check specific answers in Multi question

If you wish to perform specific checks in this Multi question, for example to check if only one of the six car brands was selected, you would use the following expression:

```
if (parseInt(q5_1) + parseInt(q5_2) + parseInt(q5_3) + parseInt(q5_4) +
    parseInt(q5_5) + parseInt(q5_6) == 1) { }
```

If you wish to check if for example either GMC OR Cadillac was selected:

```
If ( q5_1 == "1" || q5_2 == "1" ) { }
```

Set a value in a Multi

For setting specific answers in a Multi question, you set 0 for "not selected" and 1 for "selected".

```
q5_1 = q5_2 = "0";
q5_3 = "1";
```

This would set GMC and Cadillac to "not selected", and Volvo to "selected", while other answers will remain unchanged.

3.7. Grids and 3D Grids

There may come a time when you need to access a grid, as for example question q6 of the car survey which asks, "Please indicate how important the following qualities are to you when choosing a car".

Qualities

Please indicate how important the following qualities are to you when choosing a car.

1 means "Not important"
5 means "Very important"

	1	2	3	4	5	Don't know
Comfort	☐	☐	☐	☐	☐	☐
Price	☐	☐	☐	☐	☐	☐
Safety	☐	☐	☐	☐	☐	☐
Speed	☐	☐	☐	☐	☐	☐

Perhaps you wish to know whether "Not important" (answer option 1) was selected for the "Price" question. In this case you could write:

```
if (q6_2 == "1")
{
  q6_2 = "3"
}
```

Within the brackets you can place other examples for recoding a variable. For example in a 3D Grid which contains a Multi, a Single and a Grid question, you can check for individual questions by using:

Multi: `if ( q12_3 == "1" )`

Single: `if ( q13 == "4" )`

Grid: `if (q14_3 == "4" )`

3.8. Working with interview_start and interview_end

When a respondent enters a Confirmit interview, a variable called `interview_start` is set with the exact time and date. Similarly, the `interview_end` variable is set when the interview is finished. In some cases it may be useful to access those variables, for example when changing different parts of the date.

You can set different parts of the date as year, month and day or set to actual date of both variables:

```
var IS : DateTime = interview_start;
if ( IS.Month == 10 )
{
  interview_start = new DateTime (IS.Year, 9, IS.Day, IS.Hour, IS.Minute,
  IS.Second);
  interview_start = DateTime.Now;
  interview_start = new DateTime (2008, 10, 10);
}
```

3.9. Post Scripts

Post Scripts are actions that are executed after all other actions are performed. Typical examples can be when information is written in the Log Window for checking purposes or sending via email. You could have in your Post script section the following expression:

```
var l1 = noAgeCounter + " respondents have not answered Age.";
AddLogMessage (l1);
```

This expression would log the content of noAgeCounter. You would use noAgeCounter in Scripts as :

```
if (IsNull ("q4"))
{
++noAgeCounter;
}
```

In this example **noAgeCounter** would increment each time q4 is not answered. When executing the rule the entry would be displayed as below:

(8:25:06 AM) Initiating task: Rule Executor

(8:25:35 AM) 9 respondents have not answered Age.

Another example for a Post Script is the sending of emails. This could be achieved using the following expression:

```
SendMail("myemail@myemail.com", "youremail@youremail.com", "Subject: Rule
Result", "Body: \r\n" + l1 + "\r\n" + l2);
```

3.10. Validating and Executing the Script

To validate the script and check it for compilation errors, click the **Validate Action Script** button. If any errors are found, they will be listed in a separate window. The locations of the errors, in the form of line and column numbers, are also provided to assist you in correcting the errors.

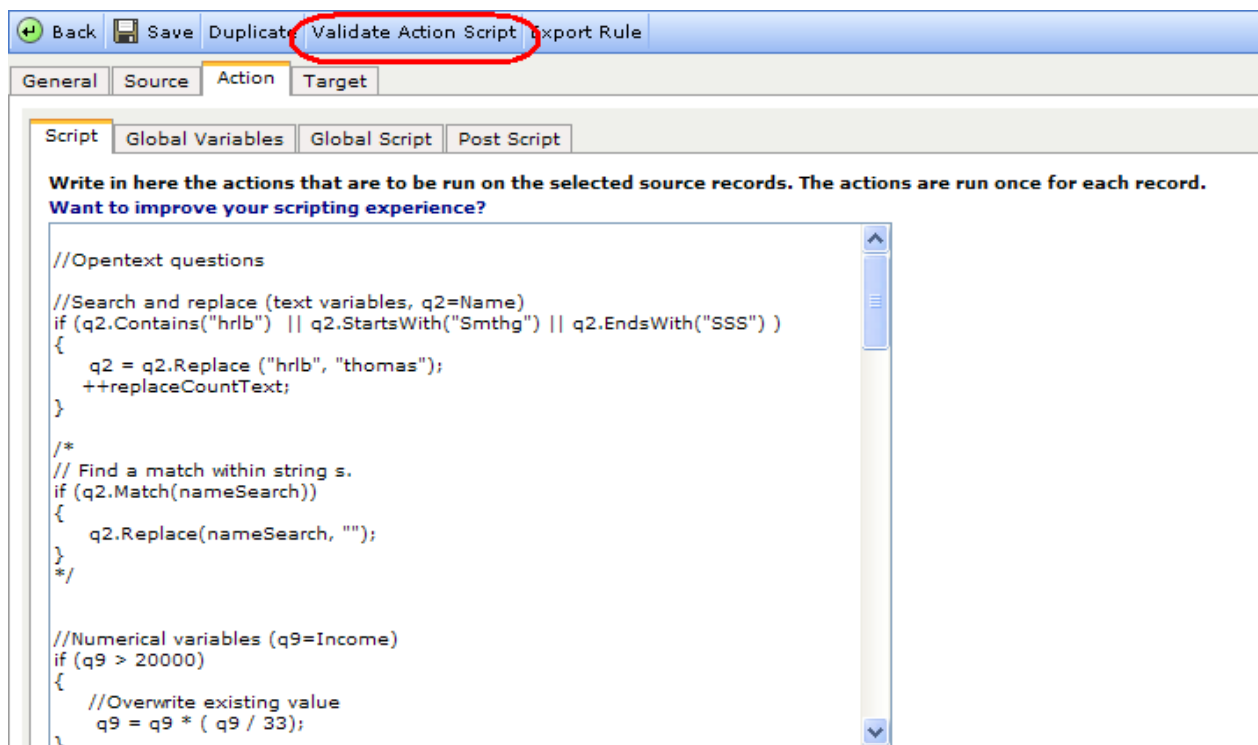


Figure 115 Validating an action script

After finalizing and for checking purposes, you can execute your script by clicking **Execute**. The Rule execution properties dialog opens. Here you can select whether the rule is to be executed ASAP, scheduled for later execution, or setup as a re-occurring task (see How to Execute a Rule on page 42 for more information).

3.11. Action Tab Script Examples

Note: Confirmit uses the Syntax Highlighter functionality. The syntax highlighter is enabled by default in all areas where scripts can be written. To disable the syntax highlighting, check “Disable script highlighting” in the User Settings overlay. When the syntax highlighter is in use, each time the Tab key is pressed, the line of script is indented one step. Each press of the Shift-Tab keys removes one indent from the line. Note that the Tab key does not insert a tab in the text. Refer to the Authoring User Guide for further details.

The first example incorporates the use of Global scripts and Action scripts.

For Global script, the defined script will be executed once before the action script is started. In this case the Global script initializes a Customer Code Library, and this needs to be done before the script can retrieve information.

Cross-referencing city name and zip-code

The Customer Code library used in this example contains the details of which zipcode belongs to which city. The cross-references between city names and their appropriate zip codes are stored in a look-up table (Hashtable), which must be declared as a global variable.

The actual script can use this information as a look-up table, so in the survey, when for example a question only asks for the zipcode, the City name can automatically be retrieved.

The following code must be added to the Global Variables tab:

```
var zipCode2CityMap : Hashtable;
```

And to the Global Script tab could be added:

```
zipCode2CityMap = MyCustomCodeLib.GetZipCode2CityMapping();
```

To the Script tab add:

```
var zipCode = ZipCodeVariable;  
var city = zipCode2CityMap[zipCode];  
  
CityVariable = city;
```

Calculating numeric age and age-band

This script takes the respondent's date of birth (in this case it has been entered as three separate questions – day, month and year) and calculates a numeric age and age-band.

```
if(!IsNull("Year_1"))
{
var year = Year_1;
var month = Month_1-1;
var day = Day_1;

var birthday= new Date(year,month,day);

var today = new Date();
var years = today.getFullYear()-birthday.getFullYear();

birthday.setYear(today.getFullYear());

// If your birthday hasn't occurred yet this year, subtract 1.
if(today.valueOf() < birthday.valueOf())
{
years=years-1;
}
agenum = years;

if (agenum>=16 && agenum<=24)
{
Agebands="1";
}

if(agenum>=25 && agenum<=34)
{
Agebands="2";
}

if(agenum>=35 && agenum<=44)
{
Agebands="3";
}

if(agenum>=45 && agenum<=54)
{
Agebands="4";
}

if(agenum>=55 && agenum<=64)
{
Agebands="5";
}

if(agenum>=65)
{
Agebands="6";
}
}
```

Importing data from single questions into a grid

This scenario might be important when data is imported from a data source that has no concept of Grids, but we want to import the data to a grid in Confirmit so it can be used for example in Reportal.

The action script may be followed by some explanations in the comments (*//* in front of the text). In this scenario, the external data source has three single questions (Comfort, Price and Color) which are to be imported into a grid (Qualities) containing three answers (Comfort, Price and, Color) in the Confirmit survey.

```
// The external data source contains 3 single questions: Comfort, Price
and Color

var singles = ['Comfort','Price','Color'];

// The grid "Qualities" in the Confirmit survey contains 3 answers with
the following codes: Comfort, Price, Color

var gridCodes = ['Comfort','Price','Color'];

// A loop iterates 3 times in this case since the array contains 3
questions

for (var i = 0; i < singles.length; i++)
{

// if the value of the current respondent of the individual single
variable is null the individual grid variable will be set equally to null
//if the value of the current respondent of individual single variable is
not null , the value of the single variable will be set to the individual
grid variable

var singleVariable = singles[i];
var gridVariable = 'g1_' + gridCodes[i];
if (IsNull (singleVariable))
SetNull(gridVariable);
else
SetValue (gridVariable, GetValue(singleVariable));
}
```

Setting a group of variables to NULL

If you want to set the value of all respondents of a group of variables to NULL, you can do this with the following script:

```
// Generate an array with the questions you would like to set to NULL

var variables = ['q1','q2','q3','q4'];

// loop iterates through all questions from the array

for (var i = 0; i < variables.length; i++)
{

// variables will be set to Null

SetNull (variables[i]);
}
```

Copying a multi question into a different multi question

If you want to set the values of the current respondent of one multi variable (source) to a different multi variable (target), this could be accomplished with the following code:

```
// Generate an array with the codes of the source multi question
var sourceCodes = ['1','2','3'];

// Generate an array with the codes of the target multi variable
var targetCodes = ['a','b','c'];

// loop iterates through all codes from the array
for (var i = 0; i < sourceCodes.length; i++)
{
var sourceVariable ='m1_' + sourceCodes[i];
var targetVariable ='m2_' + targetCodes[i];

// if the value of the current respondent of the multi variable (source)
is null the target multi variable will be set to null
//if the value of the current respondent of the multi variable (source)
is not null, the value of the multi variable (target) will be set to the
value of the multi variable (source)

if (IsNull (sourceVariable))
{
SetNull(targetVariable);
}
else
{
SetValue (targetVariable, GetValue(sourceVariable));
}
}
```

Aggregating codes from several single questions into a multi question

In this case, Q1 is a hidden multi question, while Q2, Q3 and Q4 are single questions that share the same answer list (codes) with Q1. The script will aggregate the codes from Q2, Q3 and Q4 in the multi question.

```
// Generate an array of all the codes available in q1 which will be used
for the loop
var codes = GetCodes("q1");

// E.g. If q1==1 or q2==1 or q3==1 then q1_1 is set to true. The loop
will iterate through all codes.

for(var i=0;i < codes.Length; i++)
{
if (q2==codes[i] ||q3==codes[i] || q4==codes[i])
{
SetValue('q1_'+codes[i], true);
}
}
}
```

Copying the data from questions

This is an example of a script that will copy the data from questions labeled H1 to h1.

```
var H1q = GetQuestionsByCategory("H1");
// this creates an array of all the questions with H1 in Question
Category (question properties)

// this will loop through the questions copying the data if the question
has an answer.
for (var i=0;i<H1q.length;i++)
{
    var q = H1q[i]

    if (GetValue(q.Name)>0)
    {
        h1=GetValue(q.Name)
    }
}
```

3.12. Questions and Answers

This section contains a few frequently-asked questions, and answers to those questions.

1. My source is file import to target survey db. I don't select columns in Source. By selecting columns in Target – would that mean that only those selected columns are imported/updated?

When your source is a file, you do not have the option to select a column in the Source tab. However by selecting columns in your Target tab, only the questions that have been selected will be imported/updated regardless of how many other questions you may have in your upload file.

2. My Source and my Target are both Survey dbs. I select columns in the Source on which some calculations/actions are to be performed. I do not select any columns in the Target. Will only the columns selected in the Source be updated in the Target, or will all columns be updated because I didn't select which ones were to be updated in the Target?

Only the columns that are selected in your Source tab will be updated with any action/calculation you may have performed in the Action tab.

3. My Source and my Target are both Survey dbs. I do not select any columns in the Source (and no action), and my Target is a different Survey db. If I select columns in the target, does this determine which columns are imported/updated?

If you do not select any columns in your Source tab and only select in your Target tab, only the columns selected in your Target tab will be imported/updated in the database. You will notice that once you have selected columns in the Target tab, if you go back to the Source tab the "Inherit from Target" property is automatically selected and the "All columns" option will no longer be available. So by default, if you do not specify any columns in the Source tab, it will inherit the details from the Target tab.

4. My Source and my Target are both Survey dbs. I select columns in the Source on which to perform some calculations/actions. I select different columns in the Target tab. Will any data be updated?

If you have different questions selected in your Source tab and Target tab, when you run the rule you will be presented with an error message saying that the columns selected in the Source do not exist in the Target. You can however override this by selecting "Allow variables in source schema template that do not exist in destination schema template" under the General tab. This will allow the rule to execute, but NO data will be updated since it will not be able to find any matching columns/questions to update in the destination/target schema/tab. Also, you will notice that ONLY the Source columns are available for scripting in the Action tab.

4. CRM Connector for Salesforce

The CRM Connector for Salesforce feature allows you to transfer data in both directions between Confirmit and Salesforce. This chapter describes the functionality and procedures.

Important

If you have any questions or you need assistance regarding the CRM Connector for Salesforce functionality, contact your Confirmit supplier or send an email to support@confirmit.com. The Salesforce company or supplier will not be able to assist you with the Confirmit application.

4.1. Accessing CRM Connector for Salesforce

To access CRM Connector, the feature must first be enabled in Confirmit, then a wizard will be accessible to guide you through the setup process.

4.1.1. Enabling the Feature in Confirmit

Contact your account manager to enable the feature for your company. This is necessary regardless of which version is being used.

4.1.2. Installing the Package to the Salesforce Environment (Horizons Version)

When using the standalone version of this feature, nothing needs to be installed or configured in your Salesforce environment. When a user first uses the wizard, he/she will log in to Salesforce and it will ask for permission so that CRM Connector can access Salesforce using that user's API access rights.

4.1.3. Installing the Package to the Salesforce Environment (AppExchange Version)

When using this product in the Salesforce AppExchange version, the Salesforce administrator should download and install the latest package from the AppExchange (find the Confirmit CRM Connector for Salesforce listing on the Salesforce AppExchange, and click on "Get it Now"). This feature is not intended for general business users, so we recommend that the managed package only be made visible to administrators by default.

Below are the steps to install and configure the CRM Connector for Salesforce application using the Salesforce lightning UI. Note that this AppExchange package works in both Lightning and Classic modes of the Salesforce UI, and either mode can be used for the installation.

1. Login to your Salesforce administrative account for the Salesforce org where you would like to use this feature.
2. Go to the Salesforce AppExchange website: <https://appexchange.salesforce.com>, and use the search to find the CRM Connector for Salesforce app listing.
3. Click the **Get It Now** button for the app listing to install it into your Salesforce org (it can be either a sandbox org. or a production org).
4. Select **Install for Admins Only** and click **Install**.

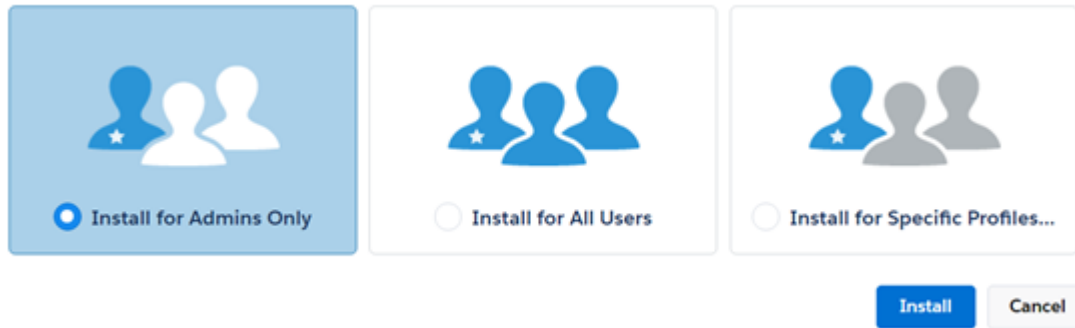


Figure 116 Installing for Administrators only

5. Wait while the installation process is completed.
6. Read the package description, then click **Done**.

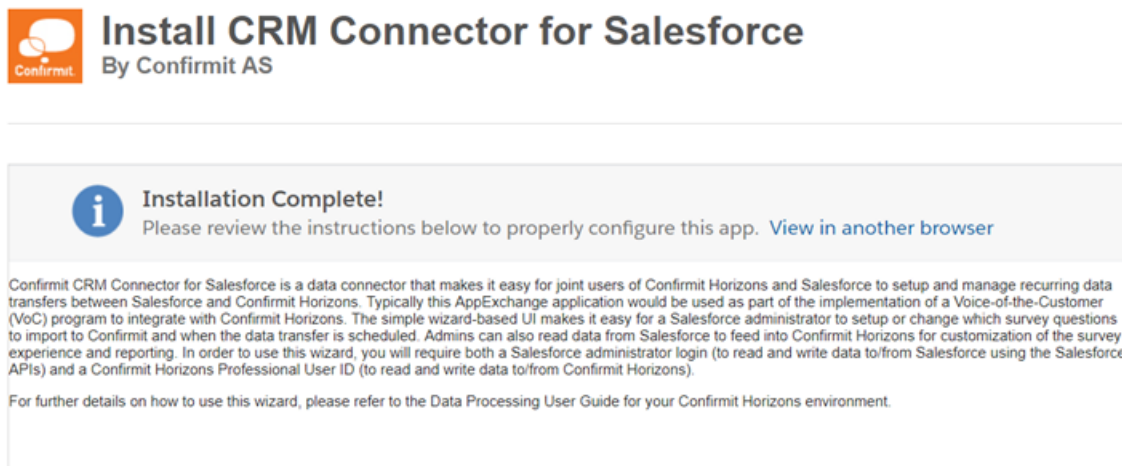


Figure 117 The package description

7. Open the Salesforce App Launcher and choose the 'CRM Connector for Salesforce' application.

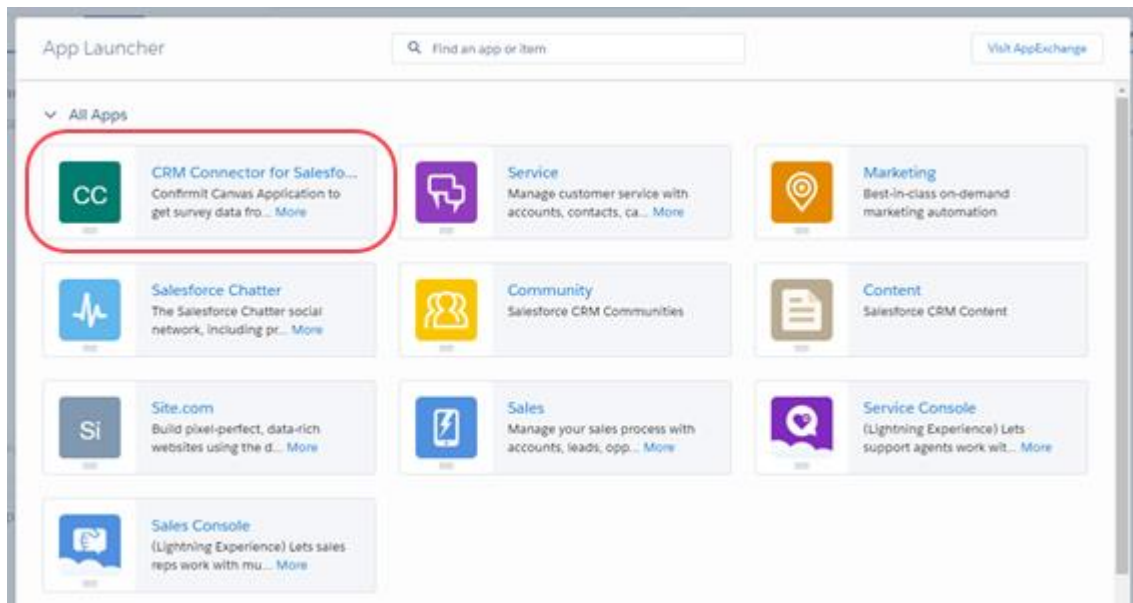


Figure 118 Choose the 'CRM Connector for Salesforce' application

8. Open the **Configuration** tab and select your Confirmit SaaS environment from the drop-down menu.

The production environment will typically be either the European, US, or Australian Confirmit site. However, during trials the Nordics environment can be used, and all customers can access CRM Connector in our non-production Testlab environment for experimentation.

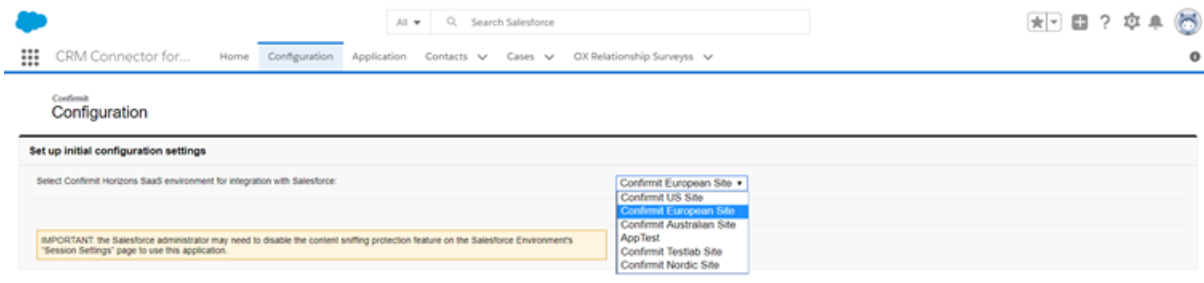


Figure 119 Selecting the site

9. Open the **Application** tab.

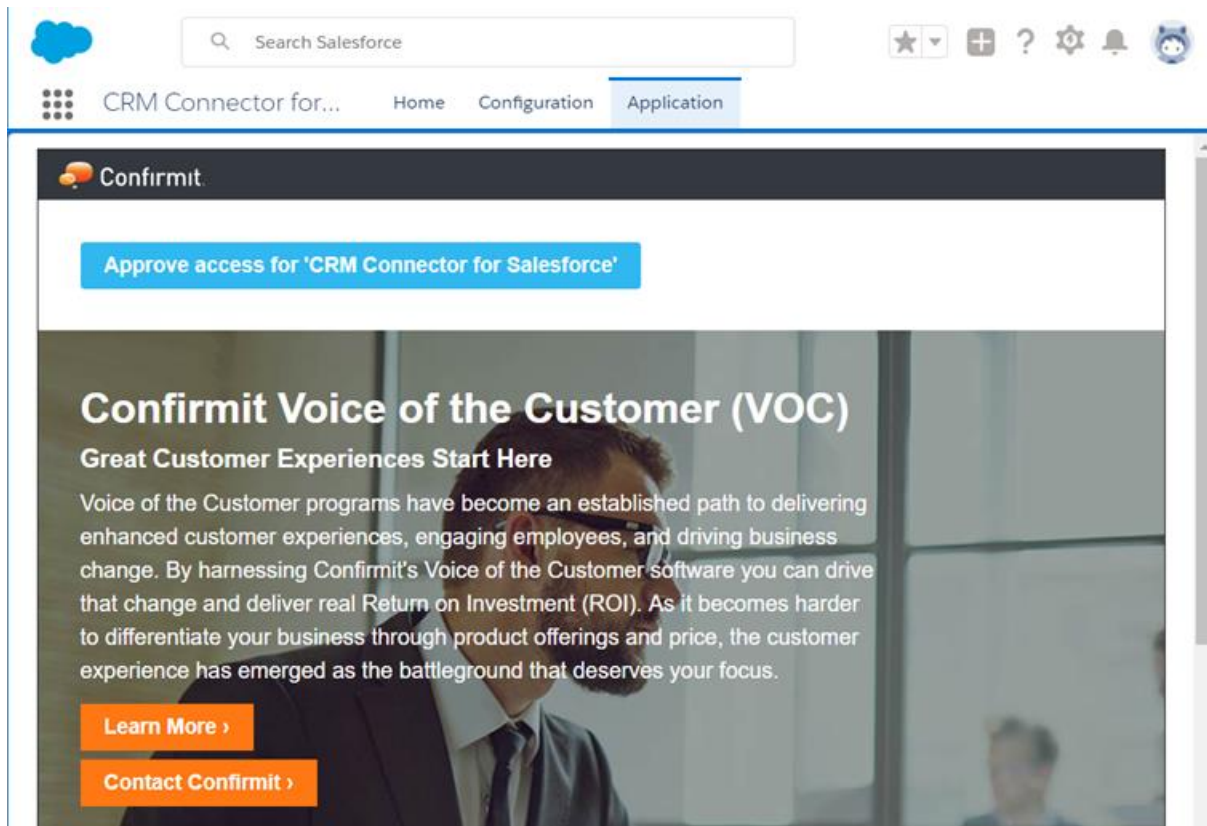


Figure 120 The Application tab

This is a one-time approval step to authorize your Confirmit environment to connect with your Salesforce environment under your user credentials.

10. Click **Approve access for 'CRM Connector for Salesforce'**.

The standard Salesforce dialog box 'Allow Access' opens in a separate window.

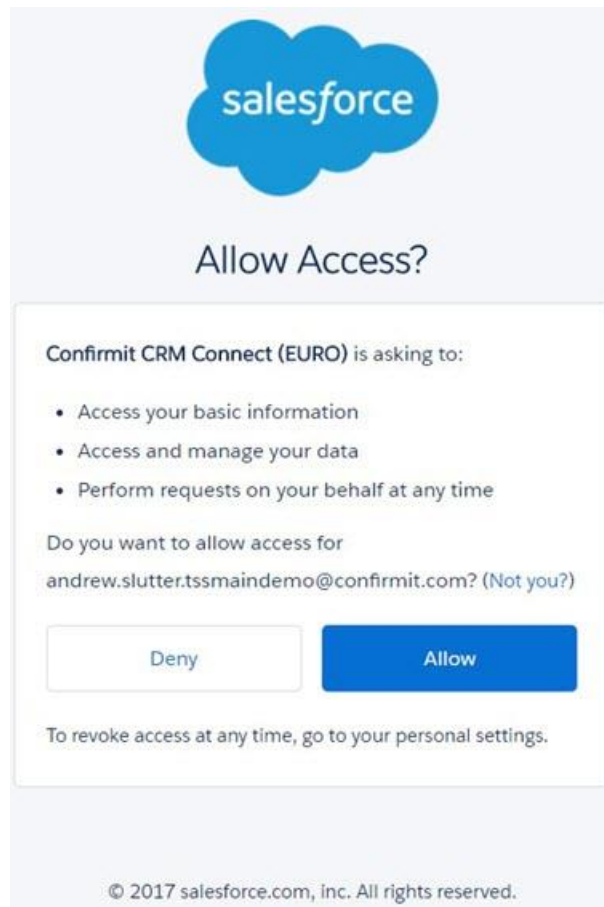


Figure 121 *The Allow Access dialog*

11. Click **Allow**.

The 'Allow access' dialog will close and you will be redirected to the CRM Connector for Salesforce application. You will now be asked to log in to Confirmit.

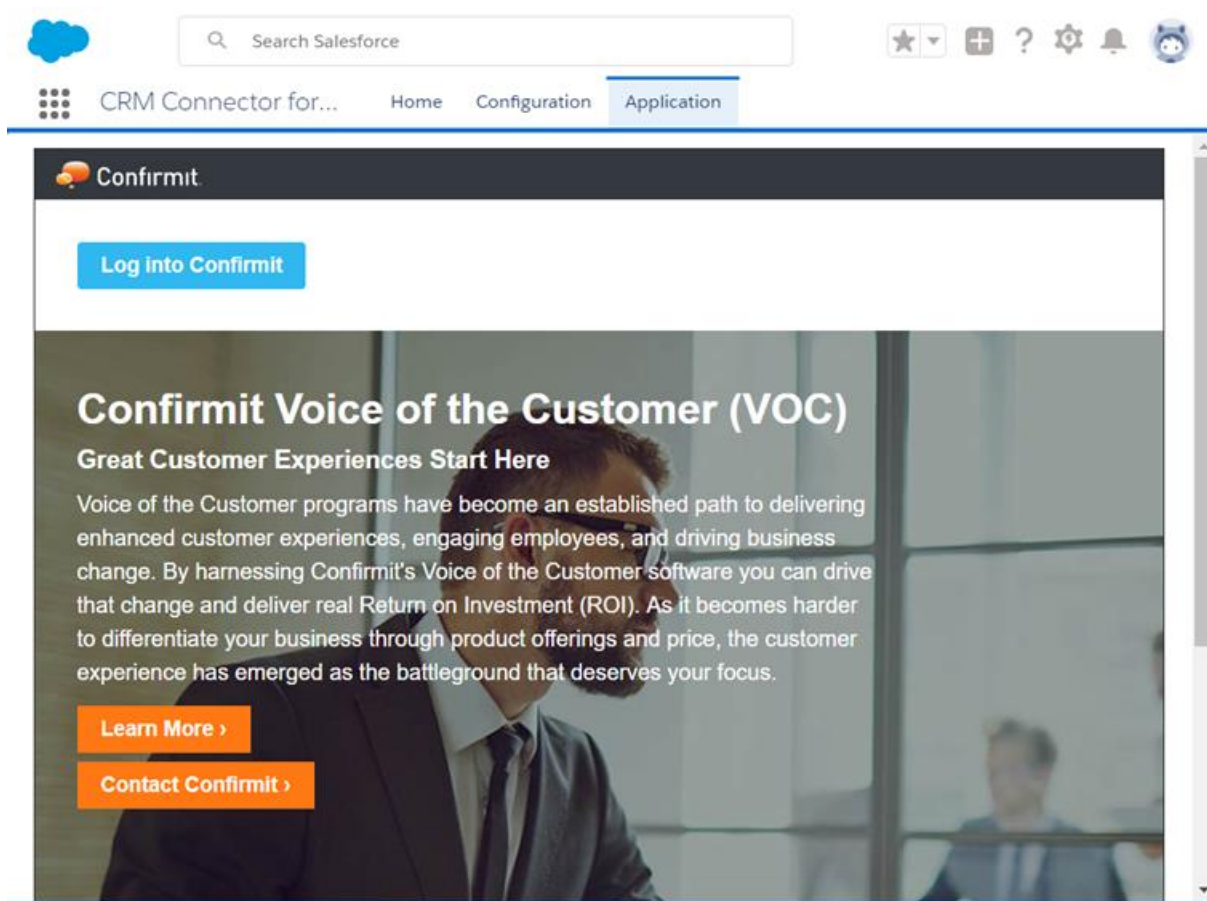


Figure 122 You will be asked to log in to Confirmit

12. Click **Log into Confirmit**.
The Confirmit Login overlay opens.

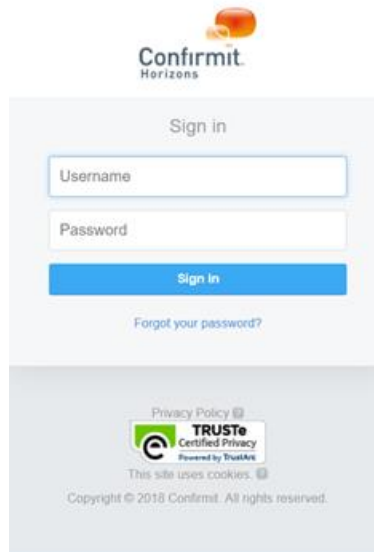


Figure 123 The Confirmit Login overlay

13. Enter your Confirmit username and password, then click **Sign in**.

You are now logged in to Confirmit and ready to start using CRM Connector for Salesforce within your Salesforce environment. You will see the Job List view in the iframe Salesforce.

4.1.4. Accessing the Wizard (Horizons Version)

No AppExchange installation process is required in the Horizons mode. To access the wizard:

1. From Survey Designer (or another module), select **CRM Connector for Salesforce** from the global navigation menu. Note that the option will only appear if the feature is enabled for your company..

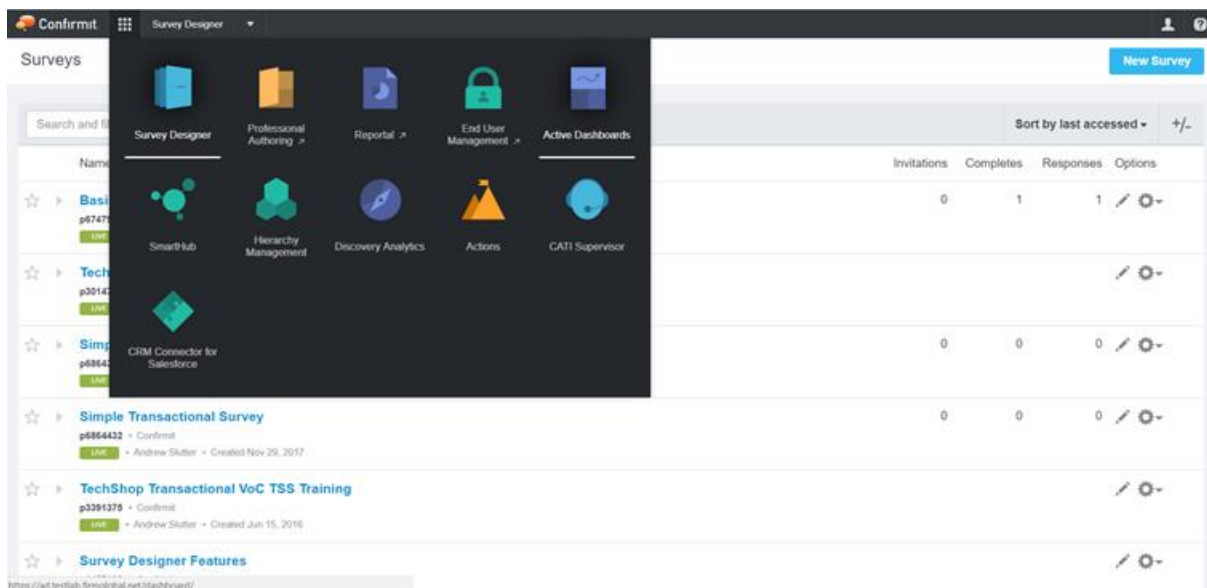


Figure 124 The CRM Connector for Salesforce link in Survey Designer

- Alternatively, from the Horizons home page, click on the **CRM Connector for Salesforce** icon. Again, the option will only appear if the feature is enabled for your company.

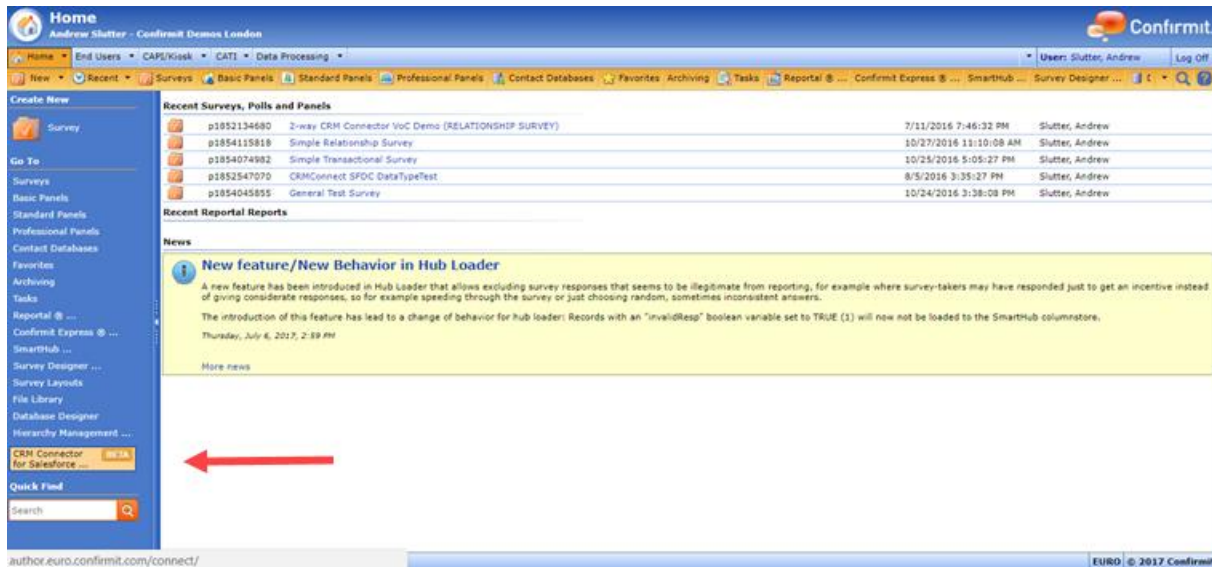


Figure 125 The CRM Connector for Salesforce link in Authoring

4.1.5. Accessing the Wizard (AppExchange Version)

The AppExchange version is an iframe around the Horizons Standalone Version. The wizard should be used by a Salesforce administrator, not a general business user.

- After logging into Salesforce, select the CRM Connector for Salesforce App from your list of Apps.
- Select the **Application** tab on the CRM Connector for Salesforce App.
You will see the wizard in the iframe.
- Log into Confirmit
The Job List View appears.

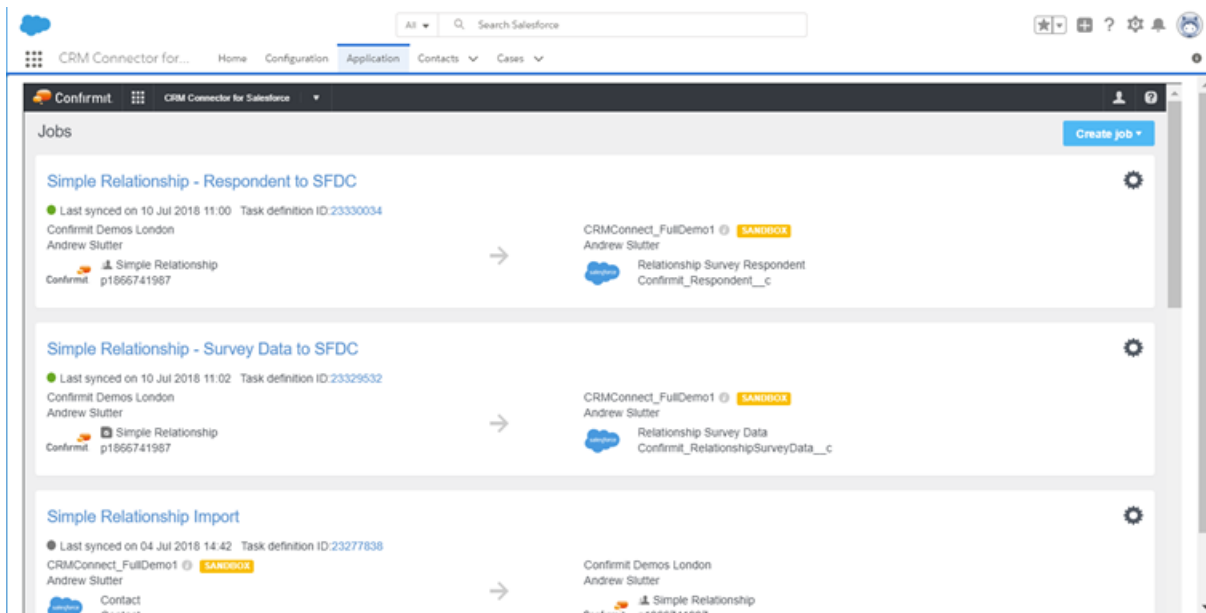


Figure 126 Example of the Job List View page

4.1.6. Job List View

The starting page for this AddOn (in either version) is the job list view. Here you will see any CRM Connector jobs listed which have been setup under your Confirmit login to transfer data to any Salesforce environment.

Note: If you have setup logins to both a production and sandbox Salesforce environment then all of these jobs will appear in the list. However those which are not setup under the current logged-in Salesforce account will be labeled "Not in current account".

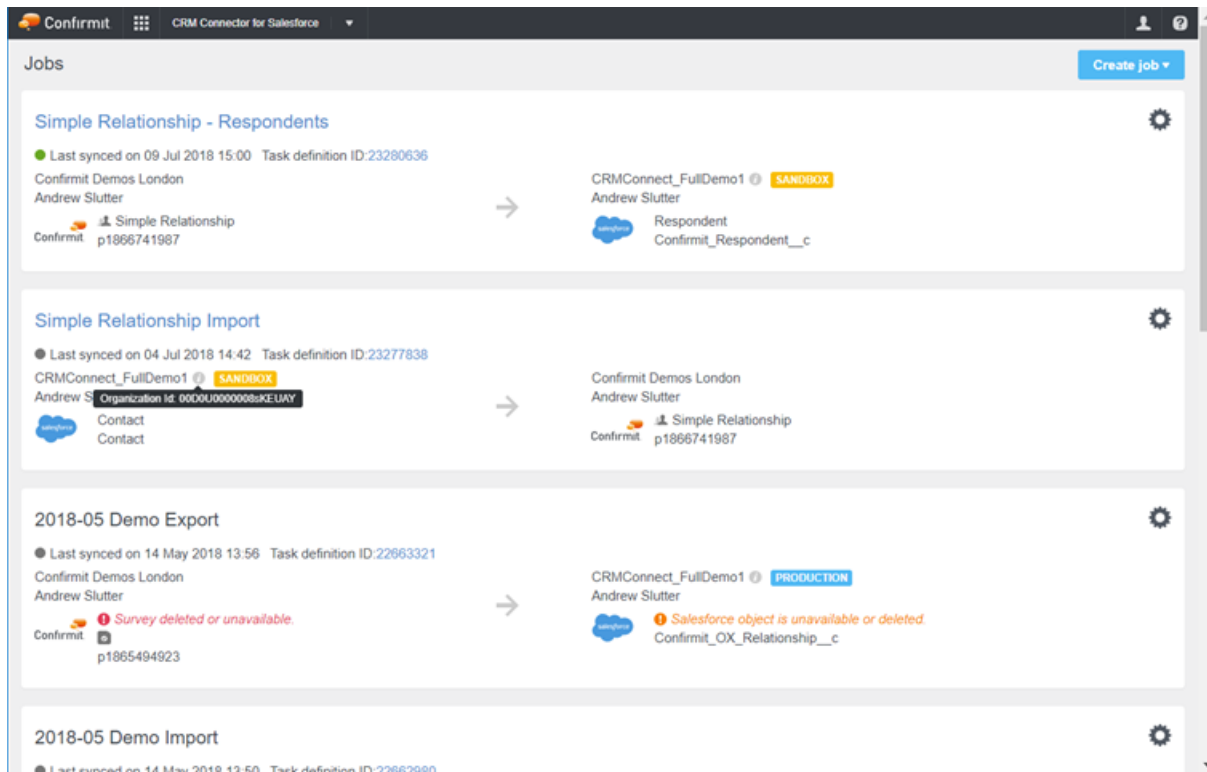


Figure 127 Example of the Job list

For each job in the job list, the following information is provided:

- The Job Label - a description of the data transfer job.
- Information on recent data synchronization – for recurring transfers, the time and date of the most recent synchronization is shown. If that transfer succeeded there is a green circle. If that transfer failed there is a red circle. If the job is not setup to recur the circle will be grey.
- The task definition ID – this number is a link to the logs associated with this job. You can click on this link to view the detailed history of this job in the Confirmit Horizons task system.
- The Confirmit Horizons Company name for the Confirmit Horizons User.
- The Confirmit Horizons User Name.
- The Confirmit Horizons Survey Name (Import jobs write in to this survey, whereas export jobs read from this survey).
- The Confirmit Horizons Survey ID.
- The Salesforce environment organization name.
- The Salesforce org id – hover over the info icon to see this id.
- The Salesforce Object Name (Import jobs read from this primary object, whereas export jobs write to this object).
- The Salesforce Object ID.
- An icon identifies the Salesforce environment either as a Sandbox org or a Production org.

- An icon identifies the Confirmit source table type for exports or the target table for imports – The  icon indicates you are exporting from the Confirmit Horizons respondent table into Salesforce, or importing into the Confirmit Horizons respondent table from Salesforce. The  icon means you are exporting Confirmit Horizons survey response data into Salesforce.
- Log in button – if you have not logged into Salesforce, you may see a log in button on the Salesforce job so that you can access Salesforce to change the job or see additional details about it.
- Information / warning messages – if the Confirmit Horizons survey has been archived or deleted you may see a warning message about that. Similarly if the Salesforce object associated with a job is not accessible or deleted you may see a message about that, too.

In cases where you are logged into a different Salesforce environment than the one associated with a CRM Connector job, some information about the Salesforce environment and object may not be accessible.

Note that for each job there is also an expandable menu of Actions on the right side of the page. These actions allow you to manage the jobs, edit them, or delete them if they are no longer needed.

4.1.7. Logging In to Salesforce

When using CRM Connector for Salesforce, at various times you may need to log into Salesforce in order to see information stored in the Salesforce environment or make changes to it. When a Salesforce login is required, you will be presented with the following login screen:

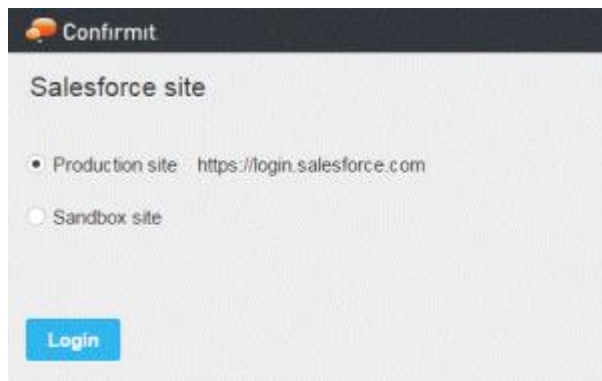


Figure 128 Selecting the Salesforce environment

1. Select the Salesforce environment you wish to log in to (it may be a production Salesforce org, or a sandbox Salesforce org; both are supported):
 - o Production site: use this option to log in to a production Salesforce environment.
 - o Sandbox site: use this option to log in to a sandbox Salesforce environment if you are doing some testing before creating the link in your production environment.
2. Enter your Salesforce login credentials and click **Log In**.

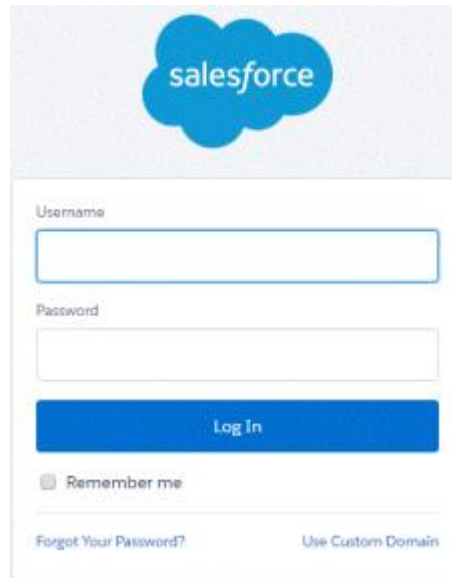


Figure 129 The login page

After you click Log In, you will then be logged into Salesforce and can proceed with the next step to use the feature.

4.2. Transferring Data from Salesforce to Confirmit

Note: CRM Connector for Salesforce is a company add-on and is subject to payment. If your company has not licensed the add-on then the CRM Connector for Salesforce link will not be visible on your home page. Refer to the Confirmit Acceptable Usage Policies (AUP) for further details. Only Chrome and Firefox browsers are currently supported.

CRM Connector for Salesforce (Salesforce to Confirmit) enables you to setup and manage recurring jobs to import CRM data from Salesforce into Confirmit through an easy-to-use wizard. The imported CRM data will be added to the survey's respondent table. From the respondent table, the data can feed into Confirmit for a variety of uses: personalization of e-mail invitations, capture as background variables in surveys to personalize survey flow and survey experience, feed into Confirmit action management, or feed into Confirmit data visualization and reporting tools.

There are now two import flows available as part of the CRM Connector for Salesforce AddOn package. This section discusses the new flow. The older flow using a Confirmit Flex extension is described later in this chapter (see Transferring Data from Salesforce to Confirmit on page for more information). New users should use this flow rather than the Flex extension. The advantages of the new flow are that it:

- Supports more simultaneous jobs per Salesforce user (although it is still constrained by Salesforce API limits).
- Allows the user to directly edit the SOQL query, which means a single job can import data from multiple related objects from Salesforce into Confirmit, and that more complex filtering is possible.
- Supports additional options for adding data into the respondent table (for example in addition to an insert operation, it is now possible to append or merge new records). This includes support for a composite key during insertion.
- Simplified flow for setting up and managing the schedule of recurring tasks.

This feature is accessible in two versions with nearly identical functionality:

1. Standalone (Horizons) version - this version is accessed via your Horizons platform. This version can be more convenient if you want to switch between multiple Salesforce environments (for example multiple sandboxes and production environments).

2. Salesforce AppExchange version - this version has identical capabilities to the standalone version, but it is accessible from inside Salesforce and distributed via a Salesforce AppExchange App (managed package). This package is an iframe around the standalone version. In this version you cannot switch between Salesforce environments.

Both versions of this feature require two user logins:

1. Confirmit Horizons Professional Authoring login
2. Salesforce login

Note: Your access to Salesforce data is controlled via the Salesforce user's settings inside Salesforce. If your Salesforce user is not a full administrative user and you are unable to see some Salesforce objects or fields inside CRM Connector for Salesforce, please review the Salesforce user's field-level access rights.

Note: The Horizons API user included in the CRM Connector for Salesforce package is only for use with the Flex import flow, and not this work flow. The API user does not work for this work flow.

Important

Access to your Salesforce data is governed by Salesforce's Acceptable Usage Policies (AUP). To maintain optimum performance and ensure that the Salesforce API is available to all Salesforce customers, Salesforce imposes daily API usage limits. It is your responsibility to ensure that you do not exceed your Salesforce API usage limits. If you exceed the limits, it could temporarily disable CRM Connector as well as your other Salesforce integrations.

4.2.1. The Procedures

There are two main procedures for this feature:

- Set up a new data transfer job (see How to Set Up a New Data Transfer Job (Salesforce to Confirmit Respondent Table) on page 128 for more information).
- Modify the SOQL query or field mapping of an existing data transfer job (see How to Modify an Existing Job Field Mapping (Salesforce to Confirmit Respondent Table) on page 135 for more information).

4.2.1.1. How to Set Up a New Data Transfer Job (Salesforce to Confirmit Respondent Table)

Create the job

1. In the **Create job** menu in the upper-right corner of the Job List, select **Salesforce to Confirmit**.
2. Enter a job name to uniquely identify this job.
3. Select the target survey into which you will import the CRM data.
4. Click **Next** to proceed.

The data will be imported into the survey's respondent table.

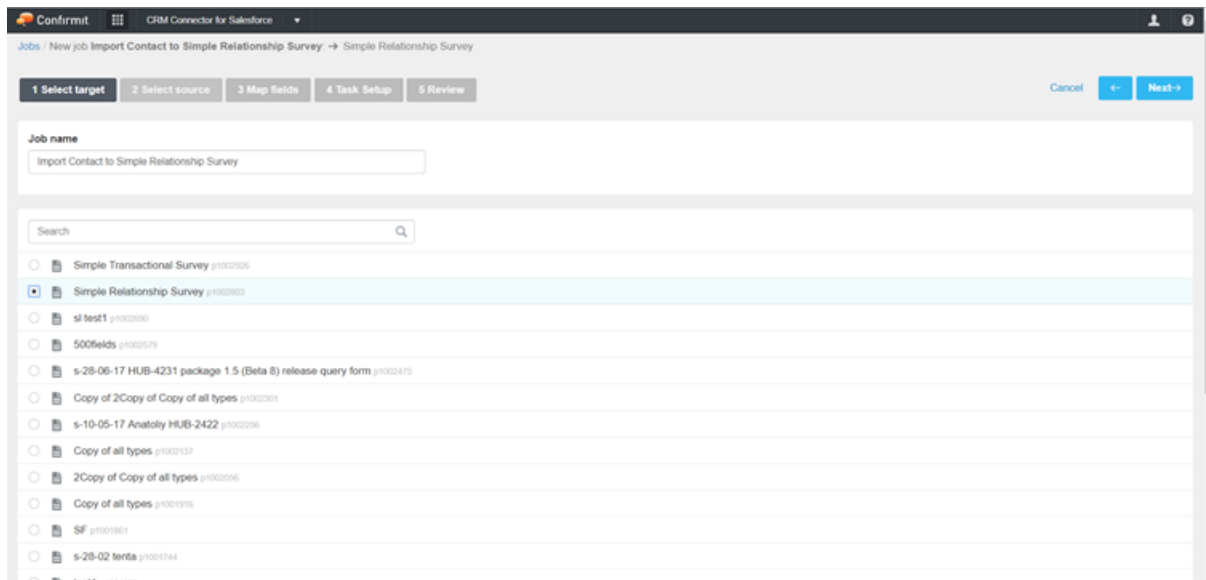


Figure 130 Selecting the target survey

Important

The field width on the respondent table is limited to 255 characters. If you plan to import text data from Salesforce and the field width in Salesforce is larger, then the text will be truncated during import.

Define which Salesforce data fields to import

You will define a SOQL query to specify which data fields will be exported from Salesforce and imported into Confirmit Horizons. You can use the SOQL builder UI to generate the query, and you can edit the SOQL query directly using the SOQL editor. You can also switch between the SOQL builder and editor so that you have the ability to adjust or modify the basic query generated by the SOQL builder. After this query has been defined, you will map the selected Salesforce fields to Confirmit Horizons fields.

- First, decide which Salesforce records you wish to include when you import data from Salesforce to Confirmit:
 - All records** - in this mode, all records matching the SOQL query will be imported
 - New records** - in this mode, any records that match the SOQL query will be imported, but the query should be written so that only records that were created since the last transfer will be included. When selected, the SOQL builder flow will automatically generate the query with an appropriate filter condition using the special macro called `:LAST_SYNC_DATETIME`.

Example: `SELECT id FROM Contact WHERE CreatedDate > :LAST_SYNC_DATETIME`

- Changed records** - in this mode, any records that match the SOQL query will be imported, but the query should be written so that only records that were changed or created since the last transfer will be included. When selected, the SOQL builder flow will automatically generate the query with an appropriate filter condition using the special macro called `:LAST_SYNC_DATETIME`.

Example: `SELECT id FROM Contact WHERE SystemModstamp > :LAST_SYNC_DATETIME`

When the query is executed, if you have used `:LAST_SYNC_DATETIME`, the macro will be replaced with the actual date-time when CRM Connector most recently ran. This makes it much easier for you to setup queries that will only import records that were recently edited or changed.

- Use the SOQL builder UI to generate your query
 - Select a primary Salesforce query object from which data will be imported. When you select the object, the list of fields available on that object is shown in the Salesforce field list menu.

- o Select which Salesforce field(s) should be imported using the field list menu. You can filter the list to more easily search for a field. The field names shown are the Salesforce API names (not the Salesforce field labels). Use the ☐ button to add the fields you want to import to the list of fields to transfer.
- o (Optional) Add filter criteria to be applied when selecting the records. If filters are defined, only query results matching the filter(s) will be included in the transfer. First, select the field name from the list of available fields. The fields listed are the API names of the fields on the primary query object; in parenthesis next to each field is the Salesforce data type. Next, select a filtering operator from the list of choices (ie =, !=, etc). Finally, add the filter criteria. You can add multiple filters, which will be all be applied to the query.

As you make changes in the SOQL builder, the changes are reflected in the SOQL editor. If you have selected «New Records» or «Changed Records», then an appropriate filter condition is added automatically to the query, too.

Note: some Salesforce field data types (eg Address and Geolocation) are not supported, so they cannot be selected and appear greyed out in SOQL Builder. For example, in Figure 131, the MailingAddress field is greyed out because it is of the unsupported Address type.

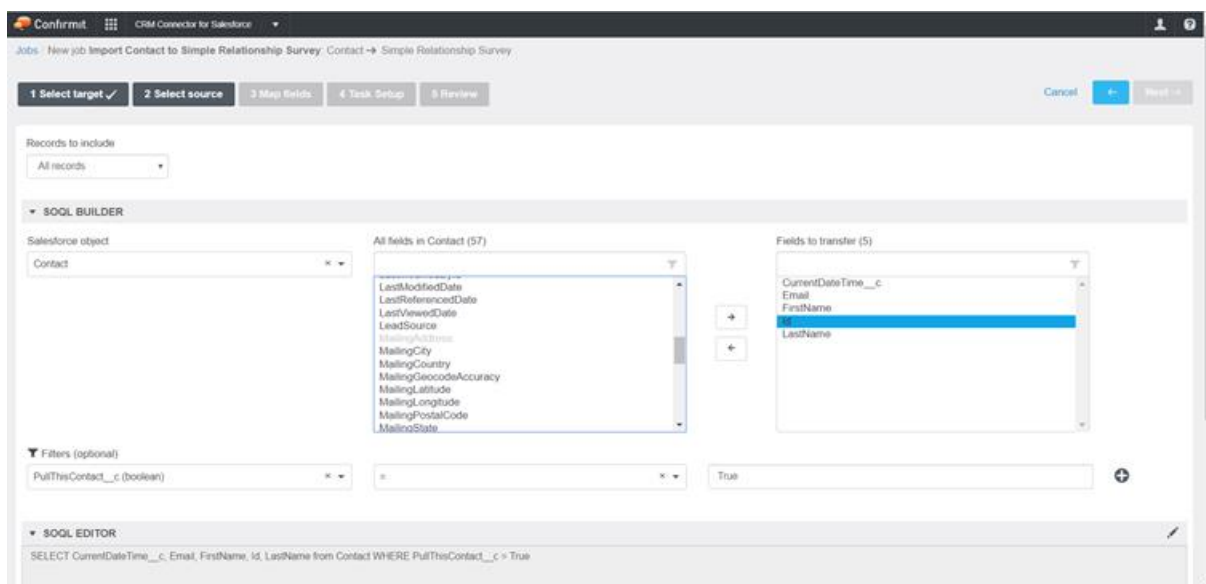


Figure 131 Defining query with SOQL Builder

3. (Optional) Manually edit the query using the SOQL editor

If you want to change the query created by the SOQL builder, you can update the query using the SOQL editor. To switch to the SOQL editor, click on the pencil icon in the upper right corner of that region on the page. One reason to change the SOQL might be if you want to import data from fields on objects related to the primary object via a Lookup relationship or a Parent relationship. In Figure 132, we have added Account.Name, as an example of a reference to a field on a related object. In this case, the Name field is not on the Contact object, but instead sits on the Account object; the Account object is related to the Contact object via the Account Lookup relationship. So, the way SOQL refers to the field is Account.Name.

If you have selected «New Records» or «Changed Records», you still need to use :LAST_SYNC_DATETIME as part of the filter conditions of your query. However, you could change it to use a different filter criteria than the default generated by the SOQL builder.

When the Job is actually submitted, we replace the :LAST_SYNC_DATETIME with the actual date-time when CRM Connector most recently ran. This makes it much easier for you to setup queries that will only import records that were recently edited or changed since the last data transfer.

4. Click the **Test Query** button to submit your query to Salesforce to test it.

You must test the query before proceeding to the next step to map the fields selected in the query. When you test the query, it is submitted to the Salesforce API, and the first 200 records of the query response are displayed so you can check to see that the query behaves as expected. If there is an error in the query or with the Salesforce platform, a message is displayed.

Important

Salesforce SOQL queries can timeout. If your query is too complex or Salesforce has too much load on the system when you submit the query and it cannot be completed, it will fail. This could also happen when running the query in batch mode. If the query is timing out, consider optimizing the table structure in Salesforce or simplifying the query. Work with your Salesforce administrator and Salesforce customer support to resolve this sort of SOQL performance issue.

The screenshot shows the Confirmit SOQL editor interface. At the top, there are two lists of fields: 'Contact' and 'CurrentDateTime__c'. The 'Contact' list includes fields like LastModifiedDate, LastReferencedDate, LastViewedDate, LeadSource, MailingCity, MailingCountry, MailingGeocodeAccuracy, MailingLatitude, MailingLongitude, MailingPostalCode, and MailingState. The 'CurrentDateTime__c' list includes CurrentDateTime__c, Email, FirstName, and LastName. Below these lists, there is a filter section with the text 'Filters (optional)' and a dropdown menu showing 'PullThisContact__c (boolean)'. The SOQL editor shows the following query: `SELECT AccountName, CurrentDateTime__c, Email, FirstName, Id, LastName from Contact WHERE PullThisContact__c = True`. Below the query editor is a 'Test query' button. At the bottom, there is a table of sample data with the following columns: Contact.AccountName, Contact.CurrentDateTime__c, Contact.Email, Contact.FirstName, Contact.Id, and Contact.LastName. The table contains one row of data: 'Misty Mountain Treks', '2018-02-20 11:32:40Z', 'andrew.slutter@confirmit.com', 'Leonard', '0033600000KT14AAAT', and 'Lion'.

Contact.AccountName	Contact.CurrentDateTime__c	Contact.Email	Contact.FirstName	Contact.Id	Contact.LastName
Misty Mountain Treks	2018-02-20 11:32:40Z	andrew.slutter@confirmit.com	Leonard	0033600000KT14AAAT	Lion

Figure 132 Editing a query with SOQL editor and viewing sample data returned by a query

- Once you are satisfied with your query, click **Next** to proceed.

Map the selected Salesforce fields to Horizons fields

Now that you have selected the fields for import via the SOQL query, they need to be mapped to fields in the Confirmit respondent table.

- Select the Import mode from the available choices:
 - Insert** – in this mode, Salesforce data retrieved via the SOQL query will be added as new records to the respondent table.
 - Append** – in this mode, Salesforce data retrieved via the SOQL query will only be added if there is not already a respondent record matching the defined key. For this option a key field must be defined in the mapping.
 - Merge** – in this mode, Salesforce data retrieved via the SOQL query will be added if there is not already a respondent record matching a defined key, and if there is an existing record matching the defined key then the existing record will be updated with the SOQL query results. For this option a key field must be defined in the mapping.

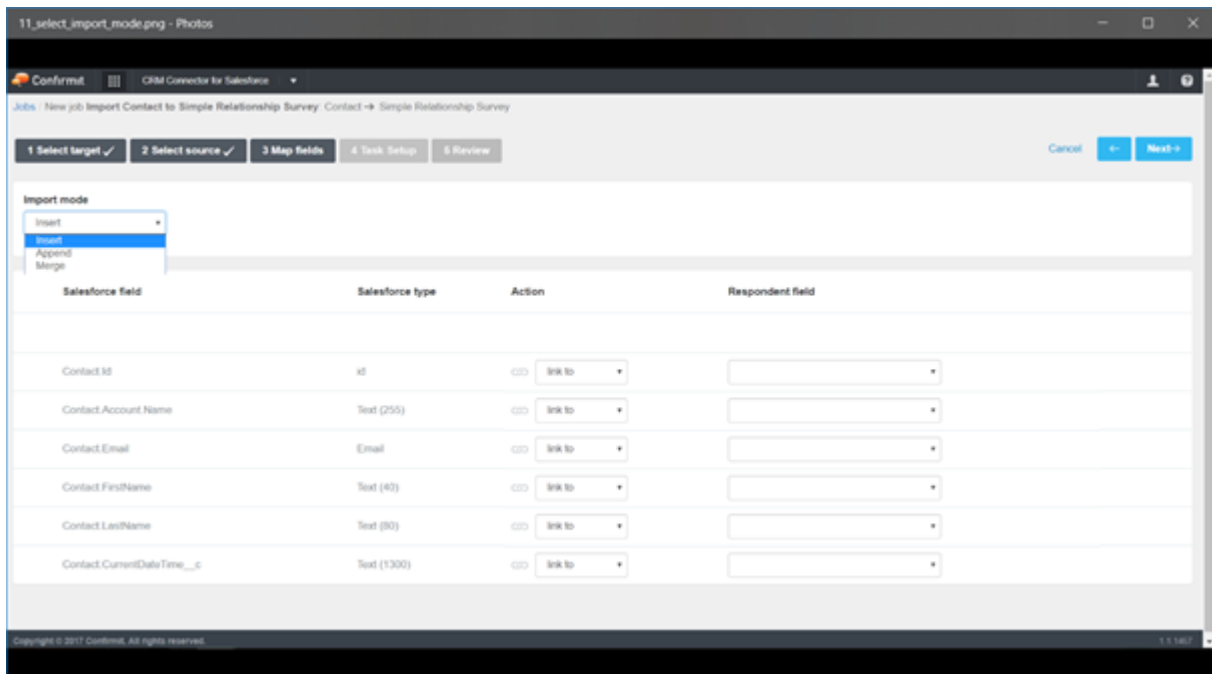


Figure 133 Selecting the import mode

2. Map the Salesforce fields to Confirmit fields.

Choose the desired mapping option for each field from the menu in the Action column.

- o If you choose **Create new**, then you provide a new respondent field name, and the Salesforce field will be mapped to a new respondent field that will be created with that name.
- o If you choose **Link to**, then you select an existing respondent field name and the Salesforce field will be mapped to that existing respondent field.

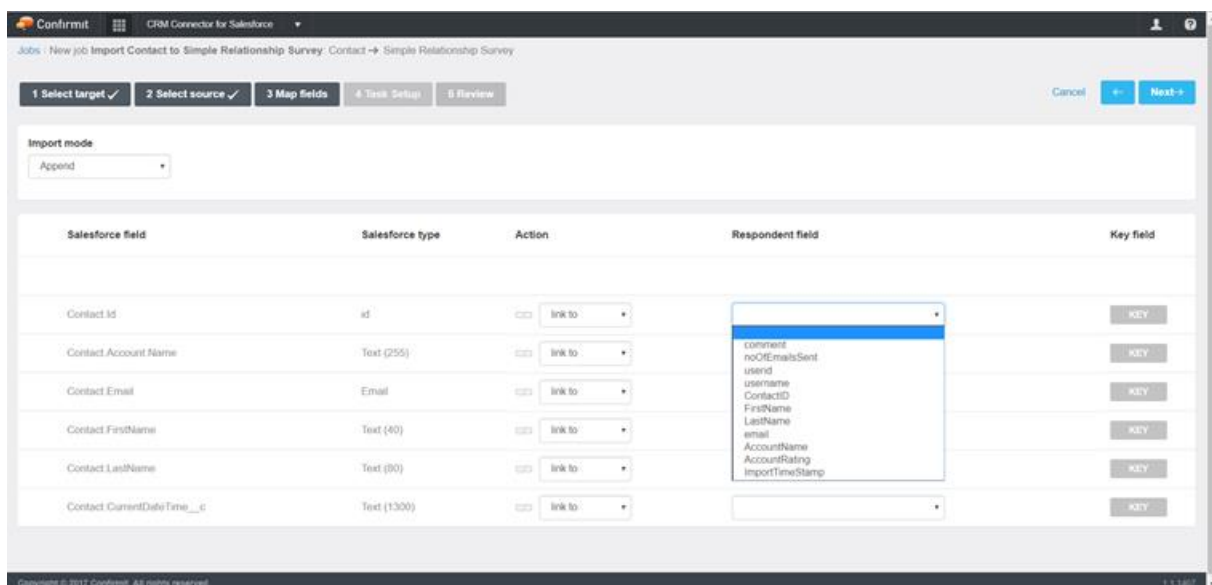


Figure 134 Mapping the fields

3. (Optional) Select a key

- If you have selected **Append** or **Merge** as the respondent table Import Mode then you must define a key field so that it is clear which is to be used as the unique record. For these two import modes, the Key Field column becomes available. To select a field as the key, click on the **Key** button in the row containing the key field. It is important that the key field is unique; if it is not then this process will not work correctly. Duplicates can be created when switching between the import modes, particularly when adding a key definition, so it is recommended that you set this aspect of a job and then do not change it.

The screenshot shows the 'Map fields' step in the Confirmit CRM Connector for Salesforce. The 'Import mode' is set to 'Append'. The table below maps Salesforce fields to Respondent fields, with 'Contact ID' selected as the 'Key field'.

Salesforce field	Salesforce type	Action	Respondent field	Key field
Contact ID	id	link to	ContactID	KEY
Contact Account Name	Text (255)	link to	AccountName	KEY
Contact Email	Email	link to	email	KEY
Contact FirstName	Text (40)	link to	FirstName	KEY
Contact LastName	Text (80)	link to	LastName	KEY
Contact CurrentDateTimes__c	Text (1300)	link to	ImportTimeStamp	KEY

Figure 135 Defining the key field

4. (Optional) sometimes one key is not enough and a composite key field is required.

For example, a composite key is useful for an annual Voice of the Customer relationship survey. In this case you might only survey the Contact once per year. Salesforce has a unique ContactID, however when you run the survey program over multiple years you also need to survey that Contact over multiple years, so the ContactID cannot be used as the unique key by itself. In this case you could create a composite key of ContactID + Year.

To define a composite key, click on the **Key** button for multiple fields, and they will be linked into a special composite key field on the respondent table called ImportKey.

Salesforce field	Salesforce type	Action	Respondent field	Key field
Contact ID * Contact Email	-	+ create new	ImportKey	KEY
Contact ID	Id	link to	ContactID	1. KEY
Contact Account Name	Text (255)	link to	AccountName	KEY
Contact Email	Email	link to	email	2. KEY
Contact FirstName	Text (40)	link to	FirstName	KEY
Contact LastName	Text (80)	link to	LastName	KEY
Contact CurrentDateTime__c	Text (1300)	link to	ImportTimeStamp	KEY

Figure 136 Defining a composite key field

- When you have completed the field mapping, click **Next** to proceed.

Set up the task

Each job creates a data processing task within the Confirmit environment to execute the data transfer.

- Define when the data should be transferred:
 - Off (Sync manually)** - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
 - Scheduled** - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.

Task setup

☐ Off (Sync manually)

☒ **Scheduled**

Frequency

Synchronize: **Daily** every 1 day(s)

Schedule

Start: 28 Nov Time: 22:00 End: 28 Feb 2018

Syncs every day at 22:00

Figure 137 Setting up the task

Review and complete the setup

Before completing the job setup, review the job information. Check that the job will run when expected. Make sure the SOQL query includes all the fields and filtering criteria that you require. Make sure the Salesforce fields are mapped to the expected Confirmit respondent table fields, and that any key fields are properly identified. If you need to fix anything you can go back to change it in the wizard before accepting the job.

1. Click **Complete setup** to save your job. You will then be taken to the Job Overview page of your new job.

Task Setup
 Scheduled: **Daily** Start: 28 Nov 2017 21:10 End: 1 Dec 2017
 Syncs every day at 21:10

SOQL Query:
 select ID, account name, email, firstname, lastname, CurrentDateTime__c from Contact where PullThisContact__c = True

Field mapping:

Salesforce field	Salesforce type	Action	Respondent field	Key
Contact ID	id	LinkTo	ContactID	KEY
Contact Account Name	Text (255)	LinkTo	AccountName	
Contact Email	Email	LinkTo	email	KEY
Contact FirstName	Text (40)	LinkTo	FirstName	
Contact LastName	Text (80)	LinkTo	LastName	
Contact CurrentDateTime__c	Text (1300)	LinkTo	ImportTimeStamp	

Figure 138 Example of the Job Overview page

4.2.1.2. How to Modify an Existing Job Field Mapping (Salesforce to Confirmit Respondent Table)

After setting up a job, you may decide that you need to change the survey data you wish to transfer.

1. To edit an existing job, select **Edit Linking** from the Actions drop-down for that job.

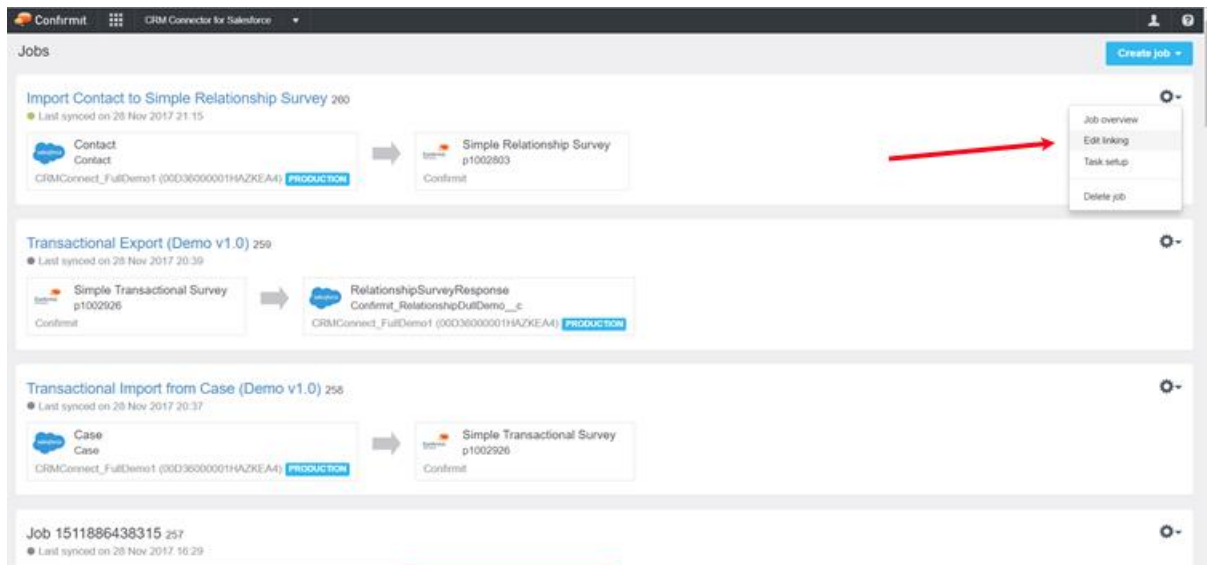


Figure 139 Editing an existing job

2. Make any changes necessary to the transfer job's target inside Confirmit.
You can rename the job or write to a different survey respondent table if desired.

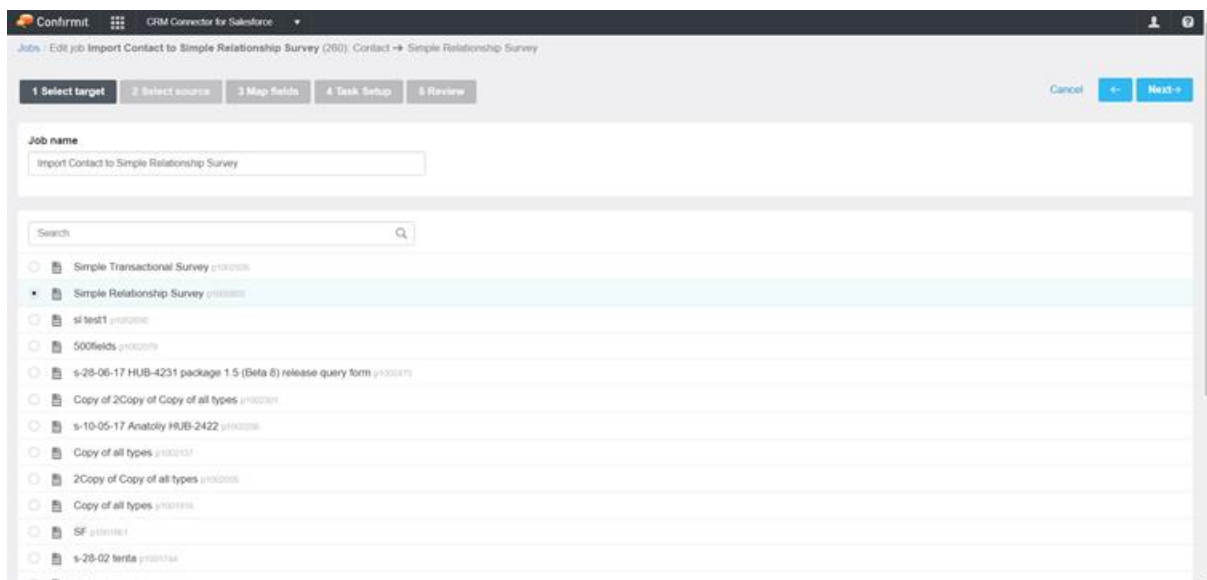


Figure 140 Change the job name or target survey respondent table

3. Complete the remaining steps of the wizard (Select source, Map fields, Task Setup, Review).
You have the flexibility to change the SOQL query, the field mapping or the task timing. Be careful if changing the import mode - if you attempt to add or change the key, you might have some duplicate respondents that need to be removed in the respondent editor.
4. After reviewing, save your changes to the job.
When you save the changes, you will be taken to the Job Overview page.

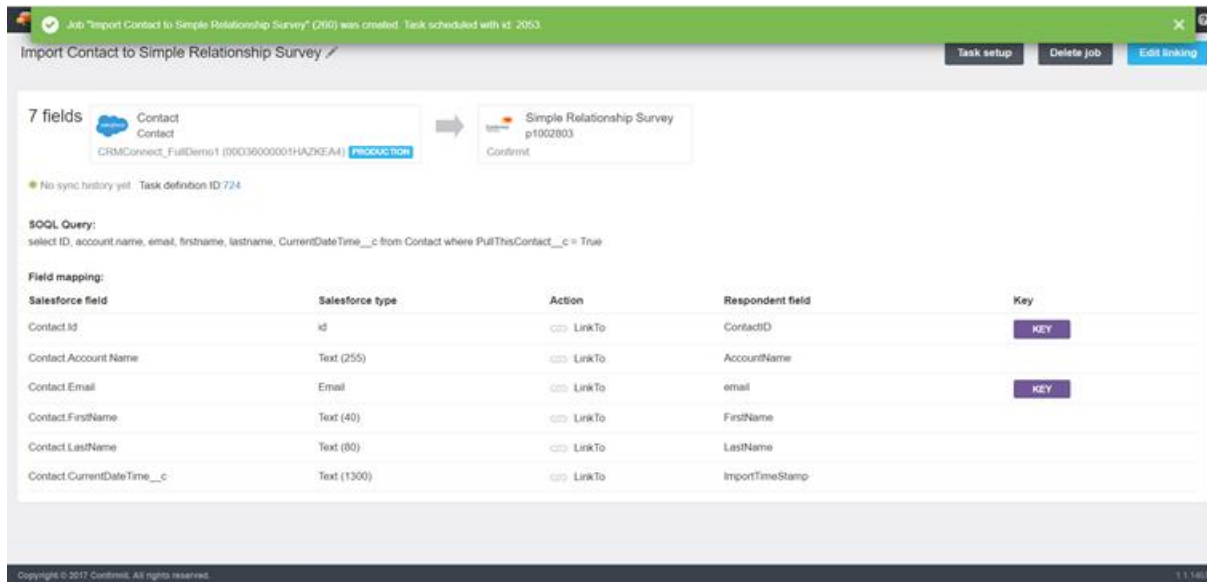


Figure 141 The Job Overview page

4.3. Transferring Data from Confirmit to Salesforce

Note: The CRM Connector for Salesforce is a company add-on and is subject to payment. If your company has not licensed the add-on then the CRM Connector for Salesforce link will not be visible on your home page. Refer to the Confirmit Acceptable Usage Policies (AUP) for further details.

Only Chrome and Firefox browsers are currently supported.

CRM Connector for Salesforce enables you to setup and manage recurring jobs to export data from Confirmit to Salesforce through an easy-to-use wizard. You can choose whether to export completed survey response data or respondent table data. When exporting survey response data, you could for example export NPS score ratings or verbatim text responses into Salesforce. When exporting respondent table data, you could export e-mail delivery status information from survey invitations or export unique respondent-specific survey links. Subsequent Salesforce configuration can make the survey data visible to Salesforce users, or trigger actions to follow-up on interesting survey responses.

This feature is accessible in two versions with nearly identical functionality:

1. Standalone (Horizons) version - this version is accessed via your Horizons platform. This version can be more convenient if you want to switch between multiple Salesforce environments (for example multiple sandboxes and production environments).
2. Salesforce AppExchange version - this version has identical capabilities to the standalone version, but it is accessible from inside Salesforce and distributed via a Salesforce AppExchange App (managed package). This package is an iframe around the standalone version. In this version you cannot switch between Salesforce environments.

Both versions of this feature require two user logins:

1. Confirmit Horizons Professional Authoring login.
2. Salesforce Administrative login.

Note: To use this feature in the interactive mode to setup jobs and create fields and objects in Salesforce, you must have Administrator access privileges for the Salesforce environment. Your Salesforce login must also have the specific Salesforce permissions to: 'modify all data', 'customize application', and 'manage profiles and permission sets'.

Once you have setup the CRM Connector job and it is running in the batch mode you can remove the three Salesforce user privileges and use a less-privileged user, however you will still need to temporarily re-enable them to modify the job in interactive mode.

The Horizons API user included in the CRM Connector for Salesforce package is only for use with the Flex import flow, and not this work flow. The API user cannot be used with this workflow: you must have a normal Confirmit Horizons Professional Authoring user.

Important:

Access to your Salesforce data is governed by Salesforce's Acceptable Usage Policies (AUP). To maintain optimum performance and ensure that the Salesforce API is available to all Salesforce customers, Salesforce imposes daily API usage limits. It is your responsibility to ensure that you do not exceed your Salesforce API usage limits. If you exceed the limits, it could temporarily disable CRM Connector as well as your other Salesforce integrations.

4.3.1. The Procedures

There are three main procedures for this feature:

- Set up a new data transfer job (see How to Set Up a New Data Transfer Job (Confirmit Survey Data to Salesforce) on page 138 for more information).
- Set up a new data transfer job (see How to Set Up a New Data Transfer Job (Confirmit Respondent to Salesforce) on page 147 for more information).
- Modify the field mapping of an existing data transfer job (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 155 for more information).

4.3.1.1. How to Set Up a New Data Transfer Job (Confirmit Survey Data to Salesforce)

The procedure for transferring data from the survey table to Salesforce is very similar to transferring data from the respondent table. There are a few differences, though:

- Records only appear in the survey data table after the respondent has begun to take the survey. (They might have completed it or not).
- Survey data includes the actual response information captured by the survey, as well as background variable data or hidden variable data if that is used in your survey.
- Some system fields are accessed in the respondent table, not the survey data table (for example limited survey URLs, or e-mail delivery status).

Creating the job

1. In the **Create Job** menu in the upper-right corner of the Job List, select **Confirmit to Salesforce**.
2. Pick a name for your CRM Connector job. A meaningful label that will help you distinguish between this job and your other CRM Connector jobs.
3. Use the drop-down menu to select Survey data instead of Respondent table as your Confirmit data source. By selecting Survey data, it means you will be transferring the answers your survey takers have provided to your survey questions (for example NPS or other rating questions, open text answers, etc).
4. Select the Confirmit survey you wish to use as the source of the data for the transfer.

This is the survey data which will be sent from Confirmit to Salesforce. You can use the text search to find the survey if you have a large number of survey projects to choose from. Note that the survey must be launched for you to be able to select it.

Once you select the source survey, that survey's name and ID will appear across the top of the wizard underneath the title bar.

The screenshot shows the Confirmit CRM Connector for Salesforce interface. At the top, there's a navigation bar with the Confirmit logo and 'CRM Connector for Salesforce'. Below this, a breadcrumb trail reads 'Jobs / New job Simple Relationship - Survey Data to SFDC:'. A progress bar at the top indicates six steps: '1 Select source', '2 Select target', '3 Select questions', '4 Configure linking', '5 Task setup', and '6 Review'. The '1 Select source' step is currently active. Below the progress bar, there's a 'Job name' field containing 'Simple Relationship - Survey Data to SFDC'. Underneath, a dropdown menu is open, showing 'Survey data' (selected) and 'Respondent table'. To the right of the dropdown is a search bar. Below the search bar, a list of survey definitions is displayed, each with a radio button and a document icon. The list includes: 'Fingerprinting reference survey def (v1.2) p1866330448', 'Internal fingerprinting reference integration (v1.2) p1866329606', 'Incentives example survey (2 incentive values) p1865151585', and 'CRM Connector Data Types p1852547070'. At the bottom of the interface, there's a copyright notice: 'Copyright © 2018 Confirmit. All rights reserved.' and a version number '1.1.2041'.

Figure 142 *Selecting the source*

5. Select the Salesforce target object.

This is the object (database table) within Salesforce where the Confirmit survey response data will be written. Data may either be written to an existing custom Confirmit object inside Salesforce, or a new custom Confirmit survey object can be created inside Salesforce. Select the appropriate option.

The screenshot shows the Confirmit CRM Connector for Salesforce interface. At the top, there's a header bar with the Confirmit logo and 'CRM Connector for Salesforce'. Below this, a breadcrumb trail reads 'Jobs / New job Simple Relationship - Survey Data to SFDC: Simple Relationship p1866741987'. A progress bar contains six steps: '1 Select source ✓', '2 Select target', '3 Select questions', '4 Configure linking', '5 Task setup', and '6 Review'. To the right of the progress bar are 'Cancel', '←', and 'Next →' buttons. The main content area has two radio buttons: 'Select from existing custom Confirmit objects' (which is selected) and 'Create New Object'. Below these is a search bar with the text 'Respondent' and '(Confirmit_Respondent__c)'. At the bottom, there's a footer with 'Copyright © 2018 Confirmit. All rights reserved.' and '1.1.2041'.

Figure 143 *Selecting the target*

If you want to create a new custom Confirmit survey object inside Salesforce, define the information needed to create it:

- o **Label** – The object label that will appear in Salesforce.
- o **Name** – the object's API name (inside Salesforce).
- o **Description** – an object description that will appear inside Salesforce.

Once you select the destination Salesforce object, that object's API name will appear across the top of the wizard under the Confirmit Title Bar.

The screenshot shows the 'Create New Object' step in the Confirmit CRM Connector for Salesforce. The progress bar at the top indicates the current step is '2 Select target'. Below the progress bar, there are two radio buttons: 'Select from existing custom Confirmit objects' (unselected) and 'Create New Object' (selected). A yellow warning box states: 'Please note that creating a new custom object will affect your organization limit in Salesforce'. Below this, there are three input fields: 'Label' with the value 'Relationship Survey Data', 'Name' with the value 'Confirmit_RelationshipSurveyData', and 'Description (optional)' which is empty. The bottom of the screen shows the copyright notice 'Copyright © 2018 Confirmit. All rights reserved.' and the version number '1.1.2041'.

Figure 144 Creating a new custom object in Salesforce

4. Select the survey question data that you would like to transfer to Salesforce.

To do this, check the boxes next to the questions you wish to export. You could also use the Select All box to select or deselect all questions if you are managing a large number of questions in your survey. The following types of Confirmit questions / variables are supported for export to Salesforce:

- ☐ Single
- ☐ Multi
- ☐ Opentext
- ☐ Numeric
- ☐ Date
- ☐ Grid

If you have an unsupported question type in your source survey, it will appear in the question list but it will be accompanied by a message stating that it cannot be mapped.

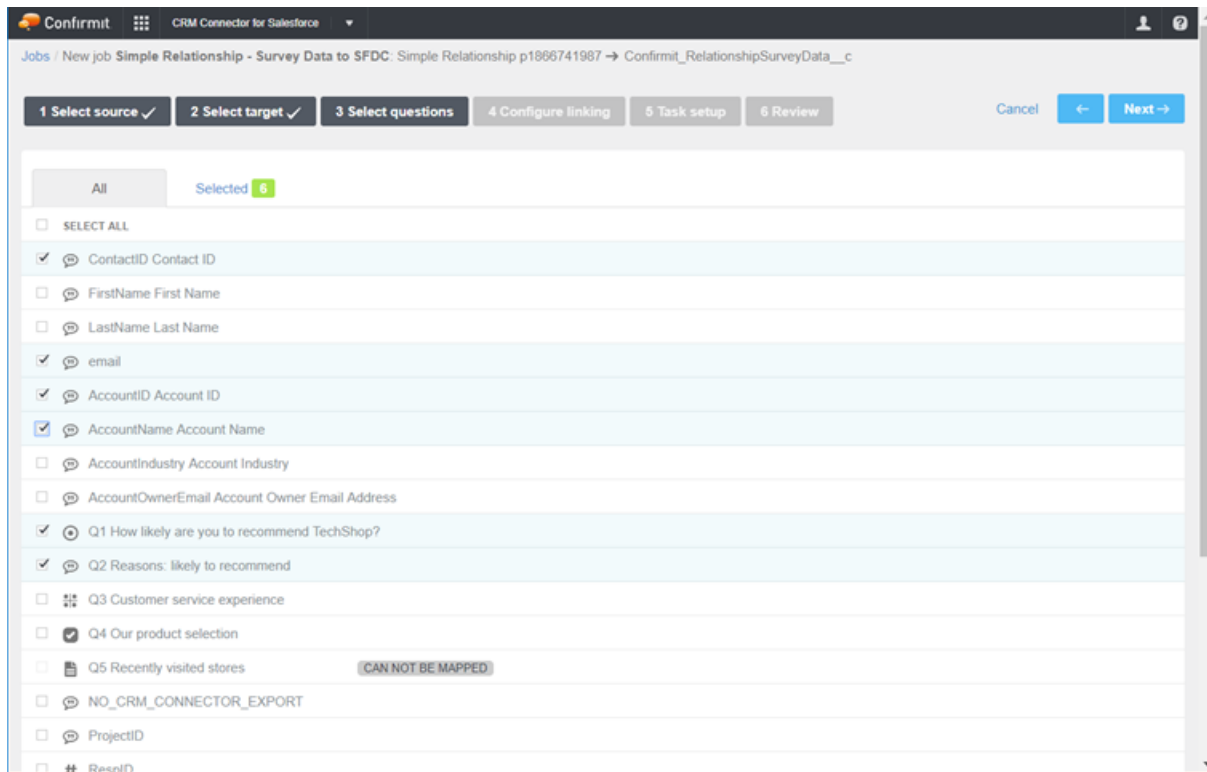


Figure 145 Selecting the questions

Loops are not supported. If your survey contains loops and you are having difficulty setting up a transfer of those questions, you can restructure the survey so that it does not use loops.

Note: For all data transfers, we will always include the Project ID and the Respondent ID. These two variables are concatenated together to form a composite key that uniquely identifies a survey response.

Before proceeding to the next step you can use the “Selected” tab to review which survey questions you have selected to transfer.

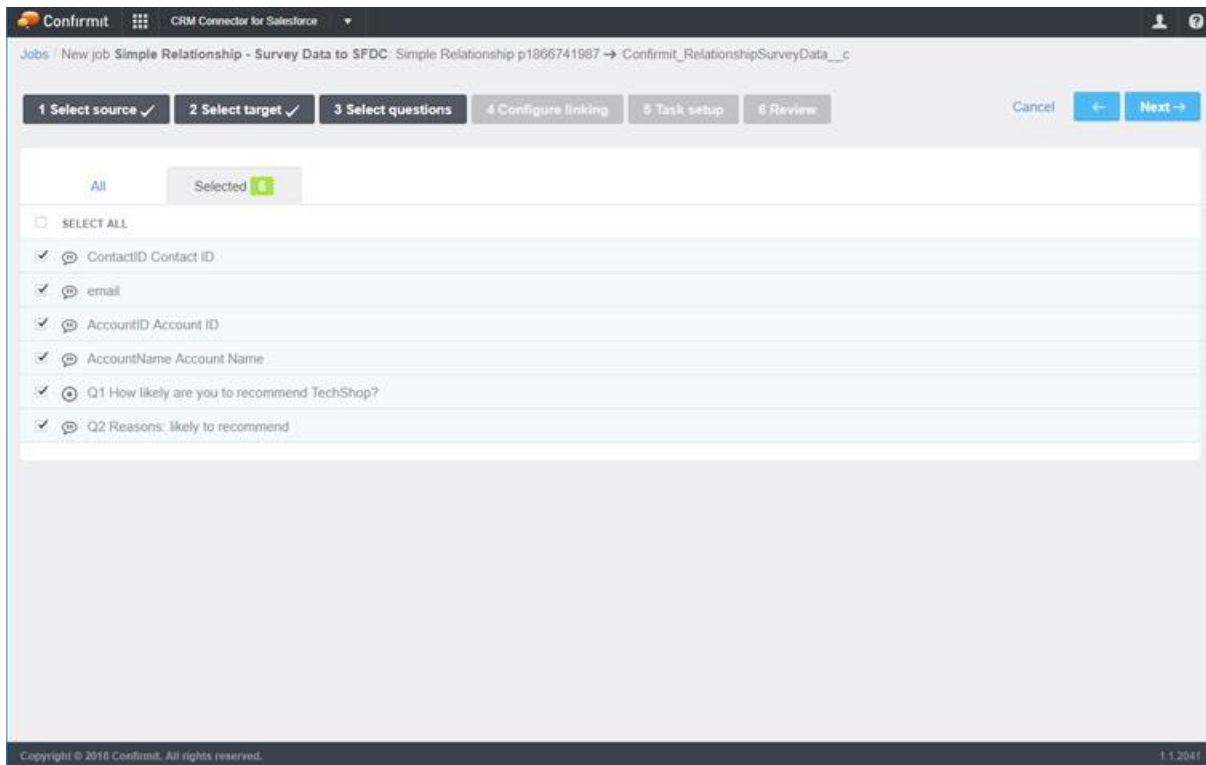


Figure 146 *Reviewing your selections*

5. (Optional) Filter records from export to Salesforce.

If you created a Text question in your survey called NO_CRM_CONNECTOR_EXPORT (as seen in the figure "Selecting the questions"), then this special question can be used to exclude records from export to Salesforce. If you set the response for this question to '1' (either programmatically via in-survey scripting, or manually via the interactive survey response data editor) then that response will not be transferred to Salesforce. The question can be set as hidden in Survey Designer so that respondents won't see it.

No action is needed to enable the question if it is present. CRM Connector will automatically see it. If any records have been excluded because of NO_CRM_CONNECTOR_EXPORT, then it is noted in the task log (see How to View the History of an Existing Job to see how to check the log).

6. Select whether you want to transfer answer codes or answer labels.

For single and grid questions, you have the choice of sending either answer codes or answer labels to Salesforce. Inside Salesforce your business users may better understand the text labels, however, numeric codes may be more helpful if you want to do any calculations inside Salesforce with the data. This setting applies to all single and grid questions in the transfer.

Confirmit CRM Connector for Salesforce

Jobs / New job Simple Relationship - Survey Data to SFDC: Simple Relationship p1866741987 → Confirmit_RelationshipSurveyData__c

1 Select source ✓ 2 Select target ✓ 3 Select questions ✓ 4 Configure linking 5 Task setup 6 Review

Cancel ← Next →

Export answer codes for single and grid questions
 Export answer codes for single and grid questions
 Export answer labels for single and grid questions

You can choose to export either answer codes or answer labels (in the default survey language) to Salesforce.

Confirmit field	Action	Salesforce field in Confirmit_RelationshipSurveyData__c object		Salesforce type
ContactID Contact ID	+ create new ▼	API name ContactID	Label Contact ID	Text (30)
email	+ create new ▼	API name email	Label Email	Text (255)
AccountID Account ID	+ create new ▼	API name AccountID	Label Account ID	Text (30)
AccountName Account Name	+ create new ▼	API name AccountName	Label Account Name	Text (255)
Q1 How likely are you to recommend TechShop?	+ create new ▼	API name Q1	Label How likely are you to recommen	Text (50)
Q2 Reasons: likely to recommend	+ create new ▼	API name Q2	Label Reasons: likely to recommend	LongTextArea (4000)
ProjectID + RespondentID	Link to	Confirmit_CompositeKey__c		Text (100) KEY

Figure 147 Selecting answer codes or answer labels

7. Configure the linking between Horizons and Salesforce fields.

Define how to link the Horizons data fields to Salesforce data fields on the custom object.

If the custom object is being created then you can only create new fields on the object. In this case, you can accept the default Salesforce field API names and labels, or name them differently.

If you are writing to an existing custom object, then you have the option of selecting Salesforce fields to be linked to the Horizons field (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 155 for more information).

Confirmit field	Action	Salesforce field in Confirmit_RelationshipSurveyData__c object		Salesforce type
ContactID Contact ID	+ create new ▼	API name: ContactID	Label: Contact ID	Text (30)
email	+ create new ▼	API name: email	Label: Email	Text (255)
AccountID Account ID	+ create new ▼	API name: AccountID	Label: Account ID	Text (30)
AccountName Account Name	+ create new ▼	API name: AccountName	Label: Account Name	Text (255)
Q1 How likely are you to recommend TechShop?	+ create new ▼	API name: Q1	Label: How likely are you to recommen	Text (50)
Q2 Reasons: likely to recommend	+ create new ▼	API name: Q2	Label: Reasons: likely to recommend	LongTextArea (4000)
ProjectID * RespondentID	Link to	Confirmit_CompositeKey__c		Text (100) KEY

Figure 148 Configuring the linking

Setting up the task

Each job creates a data processing task within the Confirmit environment to execute the data transfer.

1. Define when the data should transfer:
 - o Off (Sync manually) - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
 - o Scheduled - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.
2. Define the survey response data filter options:
 - o Data to be included - for recurring data transfers you will normally only want to transfer new and changed records. However, in some cases you will want to transfer all survey data, so that is a choice.
 - o Interview status filter - decide whether to include only completed surveys ('Completed'), or to include all surveys ('All') which will transfer data for surveys that, for example were started and some questions were answered, but the survey has not been completely answered.
3. Advanced Settings
 - o These settings can typically be left unchanged, however they are discussed in this guide (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 155 for more information).

The screenshot shows the 'Task setup' step in the Confirmit CRM Connector for Salesforce interface. The progress bar at the top indicates the following steps: 1 Select source ✓, 2 Select target ✓, 3 Select questions ✓, 4 Configure linking ✓, 5 Task setup (current step), and 6 Review. The 'Task setup' section includes the following options:

- Task setup:**
 - ☐ Off (Sync manually)
 - ☒ Scheduled
- Frequency:**
 - Synchronize: Hourly (dropdown)
 - every 1 hour(s)
- Schedule:**
 - Start: 9 Jul 2018 15:00
 - End: 9 Oct 2018
- Data to be included:**
 - ☐ All
 - ☒ New and changed records
- Interview status filter:**
 - ☐ All
 - ☒ Completed
- ADVANCED SETTINGS** (expandable section)

Figure 149 Setting up the task

Reviewing and completing the setup

Before saving the job, review the job information. Check that the job will run when expected, review the selected questions, the associated action, and which fields will be created in Salesforce. Note that for some compound question types, multiple Salesforce fields will be created.

Click **Complete setup** to save your changes.

Confirmit field	Action	Salesforce API name	Salesforce type
ContactID	Create new	ContactID__c	Text (30)
email	Create new	email__c	Text (255)
AccountID	Create new	AccountID__c	Text (30)
AccountName	Create new	AccountName__c	Text (255)
Q1	Create new	Q1__c	Text (250)
Q2	Create new	Q2__c	LongTextArea (4000)
ProjectID + RespondentID	Link to	Confirmit_CompositeKey__c	Text (100) KEY

Figure 150 Completing the setup

4.3.1.2. How to Set Up a New Data Transfer Job (Confirmit Respondent to Salesforce)

The procedure for transferring data from the respondent table to Salesforce is very similar to transferring data from the survey response table. There are a few differences though:

- The respondent table is a list of possible survey respondents. There is no guarantee they have taken the survey, or even been invited to take the survey.
- There are no compound question types in the respondent table, just single data fields.
- The respondent table contains a range of useful system fields associated with each respondent, such as the status of attempted e-mail deliveries, and the specific survey URL associated with that respondent. In some integration scenarios it is useful to transfer this data into Salesforce to centrally manage user engagement and/or use a bulk e-mail delivery tool integrated with Salesforce (for example Marketing Cloud).

Creating the job

1. In the **Create Job** menu in the upper-right corner of the Job List, select **Confirmit to Salesforce**.
2. Pick a name for your CRM Connector job. A meaningful label that will help you distinguish between this job and your other CRM Connector jobs.
3. Use the drop-down menu to select Respondent table instead of Survey data as your Confirmit data source. By selecting Respondent table, it means you will be transferring information about the potential survey respondents and the associated system information. You will not be transferring actual captured survey response data.
4. Select the particular Confirmit survey you wish to use as the source of the data for the transfer.

This is the survey data which will be sent from Confirmit to Salesforce. You can use the text search to find the survey if you have a large number of survey projects to choose from. Note that the survey must be launched for you to be able to select it.

Once you select the source survey, that survey's name and ID will appear across the top of the wizard underneath the title bar.

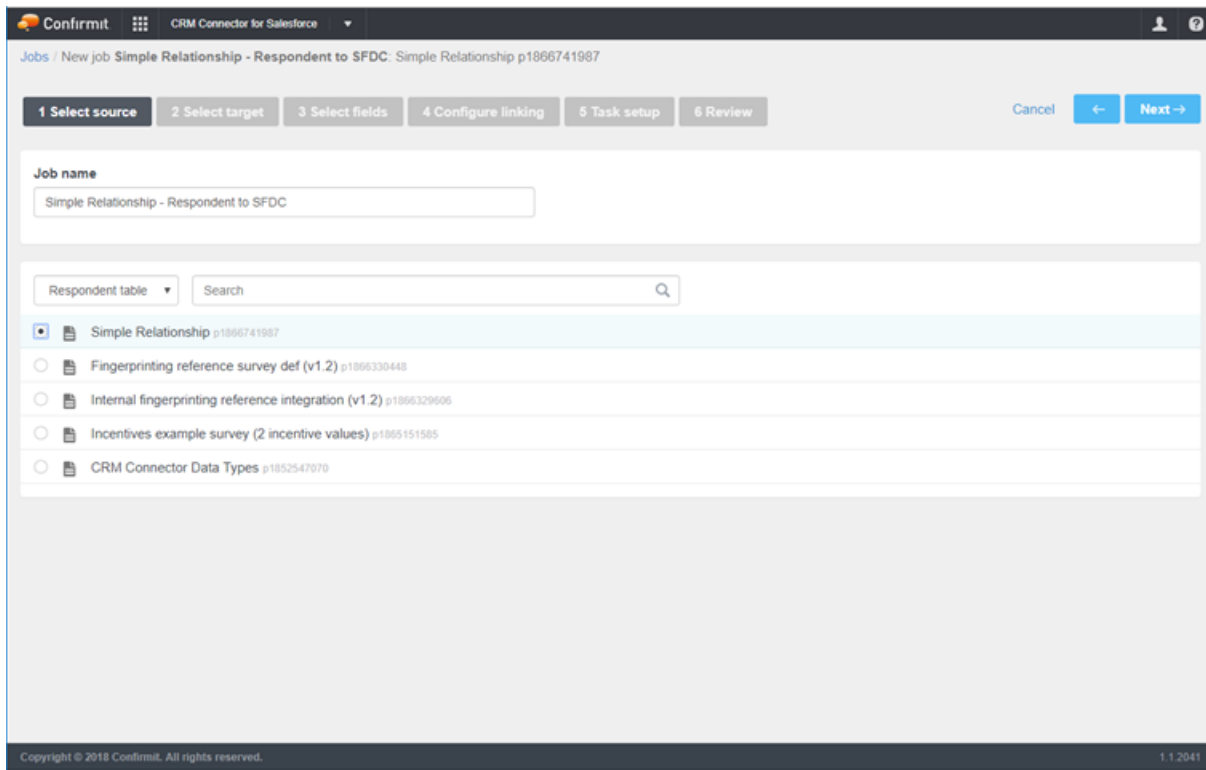


Figure 151 Selecting the source

5. Select the Salesforce target object.

This is the object within Salesforce where the Confirmit survey response data will be written. Data may either be written to an existing custom Confirmit object inside Salesforce, or a new custom Confirmit survey object can be created inside Salesforce. Select the appropriate option.

The screenshot shows the '2 Select target' step of a wizard. At the top, a progress bar indicates steps: 1 Select source ✓, 2 Select target, 3 Select fields, 4 Configure linking, 5 Task setup, and 6 Review. To the right of the progress bar are 'Cancel', 'Previous' (←), and 'Next' (→) buttons. The main content area has two radio buttons: 'Select from existing custom Confirmit objects' (which is selected) and 'Create New Object'. Below these, a list displays a single item: 'Relationship Survey Data' with the API name '(Confirmit_RelationshipSurveyData__c)' to its right. The footer contains the text 'Copyright © 2018 Confirmit. All rights reserved.' and the version number '1.1.2041'.

Figure 152 *Selecting the target*

If you want to create a new custom Confirmit survey object inside Salesforce, define the information needed to create it:

- o **Label** – The object label that will appear in Salesforce.
- o **Name** – the object's API name (inside Salesforce).
- o **Description** – an object description that will appear inside Salesforce.

Once you select the destination Salesforce object, that object's API name will appear across the top of the wizard under the Confirmit Title Bar.

The screenshot shows the Confirmit CRM Connector for Salesforce interface. At the top, there's a header with the Confirmit logo and 'CRM Connector for Salesforce'. Below this, a breadcrumb trail reads: 'Jobs / New job Simple Relationship - Respondent to SFDC: Simple Relationship p1866741987 → Confirmit_Respondent__c'. A progress bar contains six steps: '1 Select source ✓', '2 Select target', '3 Select fields', '4 Configure linking', '5 Task setup', and '6 Review'. To the right of the progress bar are 'Cancel', 'Previous' (←), and 'Next' (→) buttons. The main content area is titled 'Create New Object' and includes a warning box: 'Please note that creating a new custom object will affect your organization limit in Salesforce'. Below the warning, there are three input fields: 'Label' (containing 'Relationship Survey Respondent'), 'Name' (containing 'Confirmit_Respondent'), and 'Description (optional)' (empty). The footer contains the copyright notice 'Copyright © 2018 Confirmit. All rights reserved.' and the version number '1.1.2041'.

Figure 153 *Creating a new custom object in Salesforce*

6. Select the response table data that you would like to transfer to Salesforce.

To do this, check the boxes next to the questions you wish to export. You could also use the Select All box to select or deselect all questions if you are managing a large number of questions in your survey.

If you have created custom variables here from importing data (for example via manual upload, SFTP upload, or by importing data from Salesforce using CRM Connector for Salesforce) you will see those fields listed here, and you have the option to transfer that data to Salesforce. One import reason to include these fields is if they are Salesforce reference IDs. In that scenario, these fields can be useful to link the respondent record back to other objects within Salesforce.

The screenshot shows the 'Select fields' step of a data transfer process in the Confirmit interface. The breadcrumb trail indicates the path: Jobs / New job Simple Relationship - Respondent to SFDC: Simple Relationship p1866741987 → Confirmit_Respondent__c. The progress bar shows six steps: 1 Select source ✓, 2 Select target ✓, 3 Select fields (active), 4 Configure linking, 5 Task setup, and 6 Review. The 'All' tab is selected, and a 'Selected' count of 8 is shown. The list of fields includes system fields with descriptions and user-defined fields. The selected fields are: AccountID, ContactID, email, and FirstEmailedDate.

Field	Description	Selected
☒ AccountID		Yes
☐ AccountIndustry		No
☐ AccountName		No
☐ AccountOwnerEmail		No
☐ # CapInterviewerId	CAPI Interviewer ID	No
☒ ContactID		Yes
☐ CreatedDate	Time when the respondent record was created	No
☒ email		Yes
☐ # FailedLoginAttempts	Respondent's number of failed login attempts	No
☐ FilteredBySurveyId	Survey ID containing the e-mail invitation causing this respondent e-mail to be blocked (part of Contact Frequency Rules)	No
☐ # FilterStatus	If '1' then this respondent's e-mail address is blocked by Contact Frequency Rules	No
☐ FilterStatusDate	Time when the respondent's e-mail address was blocked by Contact Frequency Rules	No
☒ FirstEmailedDate	Time when the respondent was first sent an e-mail	Yes
☐ FirstName		No
☐ LastName		No
☐ LastUpdated	Time when the respondent record was last updated	No

Figure 154 Selecting the fields

System fields have a description to the right to make their meaning clearer. The system fields are used by a variety of different parts of the Confirmit platform: the e-mailing module, the e-mail opt-out feature, the CATI module, Contact frequency rule manager, etc.

Note: For all data transfers, we will always include the Project ID and the Respondent ID. These two variables are concatenated together to form a composite key that uniquely identifies a survey response.

Before proceeding to the next step you can use the “Selected” tab to review which survey questions you have selected to transfer.

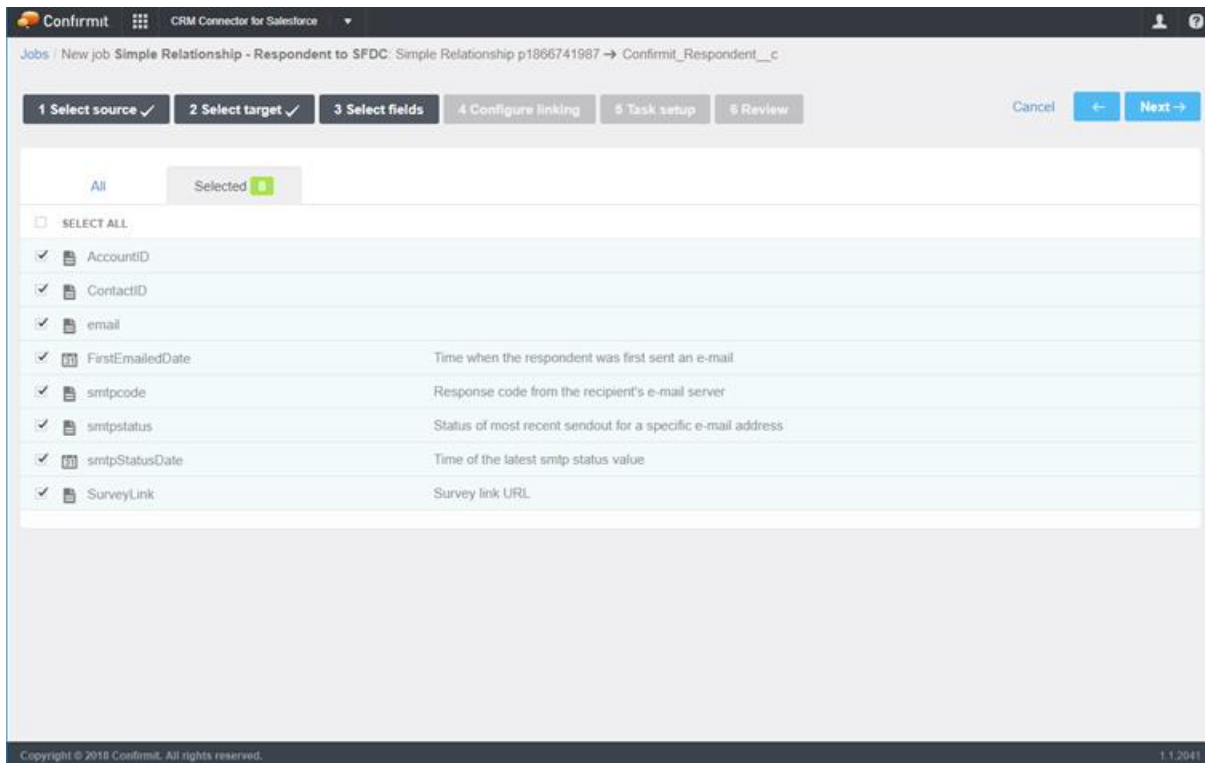


Figure 155 *Reviewing your selections*

7. (Optional) Filter records from export to Salesforce.

If you created a field in the respondent table called NO_CRM_CONNECTOR_EXPORT (as seen in the figure «Selecting the questions»), then this special field can be used to exclude records from export to Salesforce. If you set the response for this question to '1' then that respondent record will not be exported.

8. Configure the linking between Horizons and Salesforce fields.

Define how to link the Horizons data fields to Salesforce data fields on the custom object.

If the custom object is being created then you can only create new fields on the object. In this case, you can accept the default Salesforce field API names and labels, or name them differently.

If you are writing to an existing custom object, then you have the option of selecting Salesforce fields to be linked to the Horizons field (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 155 for more information).

Confirmit field	Action	Salesforce field in Confirmit_Respondent__c object		Salesforce type
AccountID	+ create new ▼	API name: AccountID	Label: Account ID	Text (30)
ContactID	+ create new ▼	API name: ContactID	Label: Contact ID	Text (30)
email	+ create new ▼	API name: email	Label: Email	Text (255)
FirstEmailedDate	+ create new ▼	API name: FirstEmailedDate	Label: Survey First Invitation	Date Time
smtpcode	+ create new ▼	API name: smtpcode	Label: Survey SMTP Code	Text (12)
smtpstatus	+ create new ▼	API name: smtpstatus	Label: Survey SMTP Status	Text (32)
smtpStatusDate	+ create new ▼	API name: smtpStatusDate	Label: Survey SMTP Status Date	Date Time
SurveyLink	+ create new ▼	API name: SurveyLink	Label: Survey Link	LongTextArea (4000)
ProjectID * RespondentID	Link to	Confirmit_CompositeKey__c		Text (100) KEY

Figure 156 Configuring the linking

Setting up the task

Each job creates a data processing task within the Confirmit environment to execute the data transfer.

1. Define when the data should transfer:
 - o Off (Sync manually) - the task will be setup and saved but will not actually run. Use this when you plan to start running the task later.
 - o Scheduled - you may choose to run the job hourly, daily, weekly, monthly, or one time only. Select the data and time when the job is to run.
2. Define the respondent data filter options:
 - o Data to be included - for recurring data transfers you will normally only want to transfer new and changed records. However, in some cases you will want to transfer all survey data, so that is a choice.
 - o Interview status filter - decide whether to include only completed surveys ('Completed'), or to include all surveys ('All') which will transfer data for surveys that, for example were started and some questions were answered, but the survey has not been completely answered.
3. Advanced Settings
 - o These settings can typically be left unchanged, however they are discussed in this guide (see How to Modify an Existing Job Field Mapping (Confirmit to Salesforce) on page 155 for more information).

Figure 157 Setting up the task

Reviewing and completing the setup

Before saving the job, review the job information. Check that the job will run when expected, review the selected fields, the associated action, and which fields will be created in Salesforce.

Click **Complete setup** to save your changes.

Confirmit CRM Connector for Salesforce

Jobs / New job Simple Relationship - Respondent to SFDC: Simple Relationship p1866741987 → Confirmit_Respondent__c

1 Select source ✓ 2 Select target ✓ 3 Select fields ✓ 4 Configure linking ✓ 5 Task setup ✓ 6 Review

Cancel Complete setup

Task Setup
 Scheduled: Hourly Start: 9 Jul 2018 17:00 End: 9 Oct 2018
 Syncs every hour

Warning: this action will create a new custom survey object in your Salesforce organization. You are currently using 2 custom objects.

Confirmit field	Action	Salesforce API name	Salesforce type
AccountID	Create new	AccountID__c	Text (30)
ContactID	Create new	ContactID__c	Text (30)
email	Create new	email__c	Text (255)
FirstEmailedDate	Create new	FirstEmailedDate__c	DateTime
smtpcode	Create new	smtpcode__c	Text (12)
smtpstatus	Create new	smtpstatus__c	Text (32)
smtpStatusDate	Create new	smtpStatusDate__c	DateTime

Figure 158 Completing the setup

4.3.1.3. How to Modify an Existing Job Field Mapping (Confirmit to Salesforce)

After setting up a transfer job, you may decide that you need to change the selected questions or field linking. The procedure is largely the same regardless of whether you are transferring data into Salesforce from the respondent table or from the survey response table. Because the two workflows are so similar we will illustrate the procedure using the feature to export from survey response data as the example, but the process is the same if you are modifying a job to export respondent table data.

1. To edit an existing job, select **Edit Linking** from the Actions drop-down for that job.

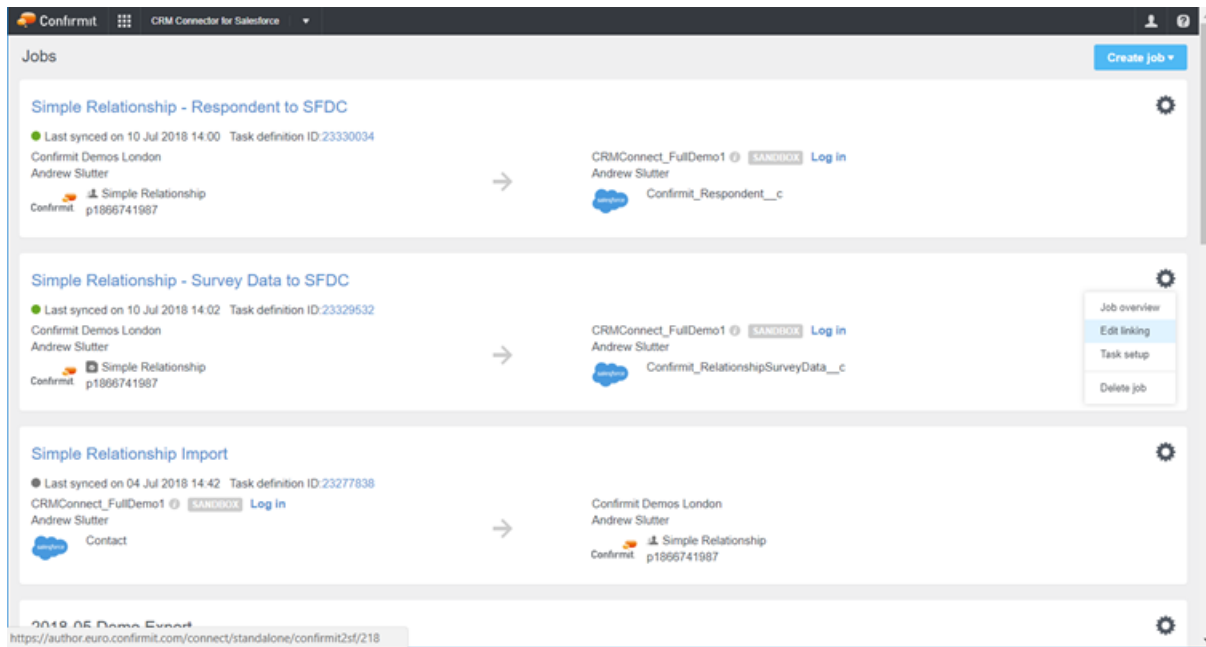


Figure 159 Editing an existing job

2. Make any changes necessary to the question / field mapping.

Select and deselect the checkboxes next to the Confirmit survey questions / respondent fields to add or remove them from the data transfer job. Questions / fields that are currently mapped will already be checked.

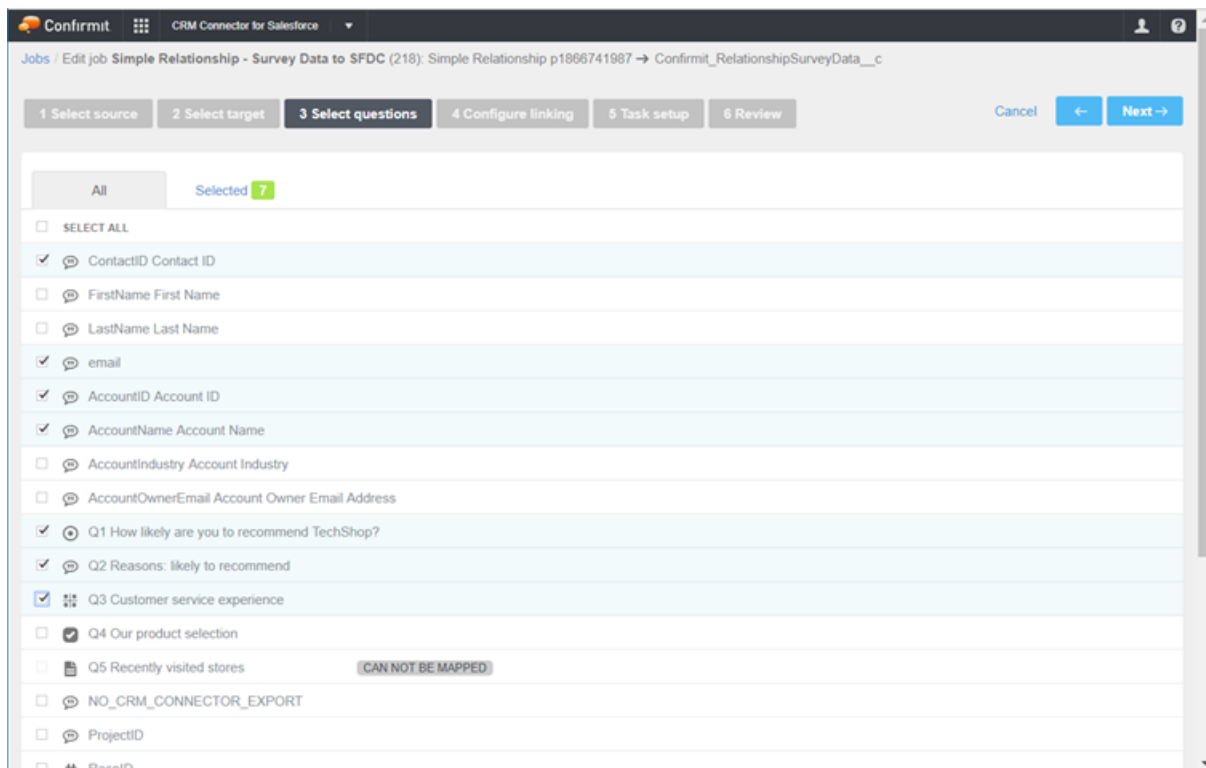


Figure 160 Editing the question mapping

3. Update the field linking

Make any required changes to the field linking and/or create new fields on the Salesforce custom object.

One particularly useful reason to change the linking is so that you can write Salesforce reference IDs from the Confirmit Horizons record directly into a Salesforce reference field (for example a Lookup or Master-Detail relationship). Reference fields can be used inside Salesforce to link a survey response or respondent record directly to a related Salesforce object record (for example a specific Contact, an Account, or a Case associated with the survey response or respondent record). CRM Connector for Salesforce cannot create reference fields; they should be created inside Salesforce. However, the wizard can link to an existing reference field, as shown in the figure below.

IMPORTANT

The menu of available Salesforce fields for linking will only show valid field linkings. Fields whose Salesforce data type cannot be linked to a Horizons data type will be visible but grayed out in the menu. Salesforce fields that cannot be updated through the Salesforce API will not appear in the menu list at all. Note that when creating a Master-Detail relationship inside Salesforce, you must set the option to Allow re-parenting if you want to use it here. Without that setting, you cannot update the relationship and so CRM Connector will not list that choice.

Confirmit field	Action	Salesforce field in Confirmit_RelationshipSurveyData__c object	Salesforce type
ContactID Contact ID	link to	API name (Salesforce label) ContactMaster__c (Contact)	reference
email	link to	API name (Salesforce label) AccountID__c (Account ID) AccountName__c (Account Name) ContactID__c (Contact ID) ContactMaster__c (Contact) email__c (Email) Q1__c (How likely are you to recommend TechS...) Q2__c (Reasons: likely to recommend)	Text (255)
AccountID Account ID	link to	API name (Salesforce label) AccountName__c (Account Name)	Text (255)
AccountName Account Name	link to	API name (Salesforce label) Q1__c (How likely are you to recommend TechS...)	Text (250)
Q1 How likely are you to recommend TechShop?	link to	API name (Salesforce label) Q2__c (Reasons: likely to recommend)	LongTextArea (4000)
Q2 Reasons: likely to recommend	link to	API name (Salesforce label) Q3__c (Reasons: likely to recommend)	Text (250)
Q3 Customer service experience (3 fields)	create new	API name (Salesforce label) Q3__c (Reasons: likely to recommend)	Text (250)

Figure 161 Configuring the linking (linking to Lookup relationships)

4. Make any changes as needed to the Task setup

(Optional) Advanced Settings.

You can control the Salesforce bulk upload batch size here. This is a debugging feature. CRM Connector for Salesforce exports survey response data or respondent data into Salesforce in batches of 5000 records. Often when setting up an integration, Salesforce has been configured by the administrator to automatically process the Confirmit data records after a CRM Connector upload (for example with a Process Builder workflow or an APEX handler). However, if that Salesforce process fails because of invalid data stored in Confirmit, Salesforce may reject an entire group of survey records. This feature is helpful in that scenario because you can temporarily set the batch size to 1 and load the records into Salesforce one at a time to more easily see which specific records have the data problem. It is best practice to leave this at the normal default setting to make sure you won't exceed your daily global Salesforce API call limits.

Jobs | Edit job Simple Relationship - Survey Data to SFDC (218): Simple Relationship p1866741987 → Confirmit_RelationshipSurveyData__c

1 Select source 2 Select target 3 Select questions ✓ 4 Configure linking ✓ 5 Task setup 6 Review

Cancel + Next →

Task setup

☐ Off (Sync manually)
☒ Scheduled

Frequency

Synchronize: Hourly every 1 hour(s)

Schedule

Start: 9 Jul 2018 17:00 End: 9 Oct 2018

Syncs every hour.

Data to be included

☐ All
☒ New and changed records

Interview status filter

☐ All
☒ Completed

ADVANCED SETTINGS

Salesforce bulk upload batch size

5000

Figure 162 Advanced Settings for Task setup

- Review and accept the changes to your job.
 When you save the changes, you will be taken to the Job Overview page.

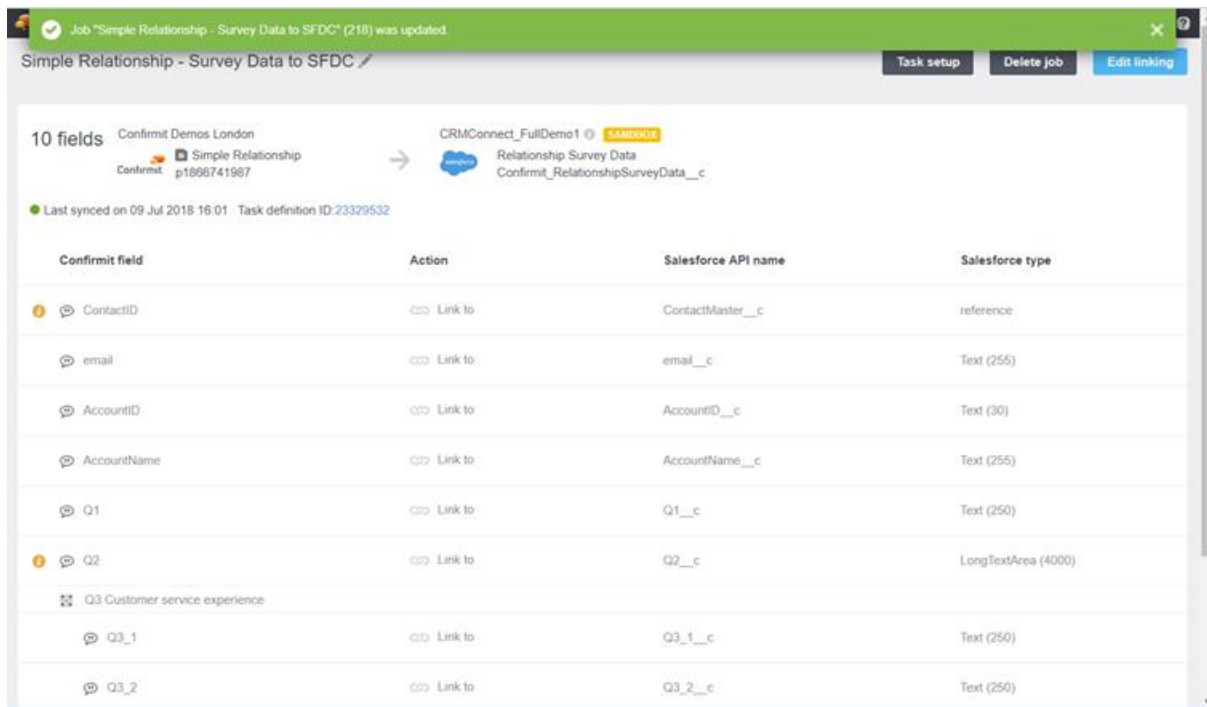


Figure 163 The Job Overview page

4.4. Managing CRM Connector Jobs

The procedures discussed in this section are the same for all CRM Connector jobs, regardless of the direction of data transfer (Confirmit to Salesforce or Salesforce to Confirmit).

4.4.1. The Procedures

There are four main procedures to manage your CRM Connector jobs:

- View the logs of an existing data transfer job (see How to View the History of an Existing Job on page 159 for more information).
- Modify the schedule of an existing data transfer job (see How to Modify an Existing Job Schedule on page 162 for more information).
- Delete a job (see How to Delete a Job on page 164 for more information).
- Rename an existing data transfer job (see How to Change the Name of an Existing Job on page 165 for more information).

4.4.1.1. How to View the History of an Existing Job

After you have submitted a job, you may want to see the logs that were created by the task. One place to do that is via the task management user interface in the Professional Authoring UI. However, it is often easier to use direct links from the Job List to see the logs for a particular job.

1. In the Job List, click on the task definition ID (it is a blue integer number).

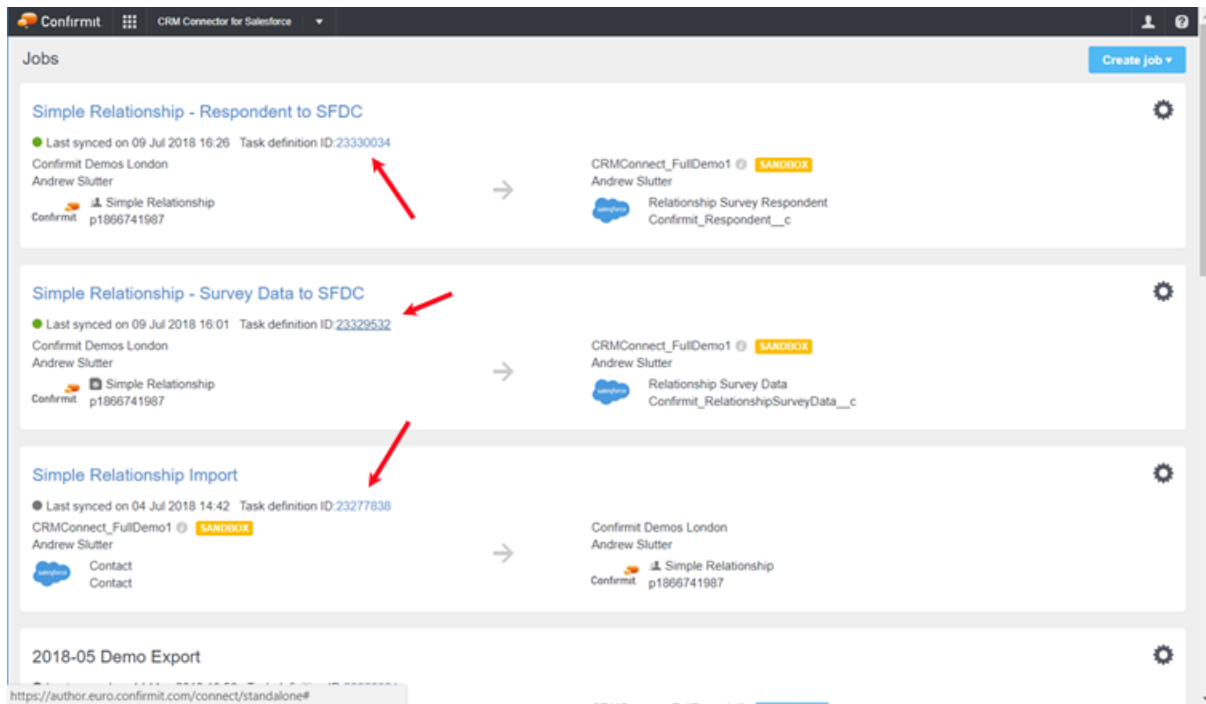


Figure 164 Selecting the task definition ID from the Job View list

The task definition associated with the job opens.

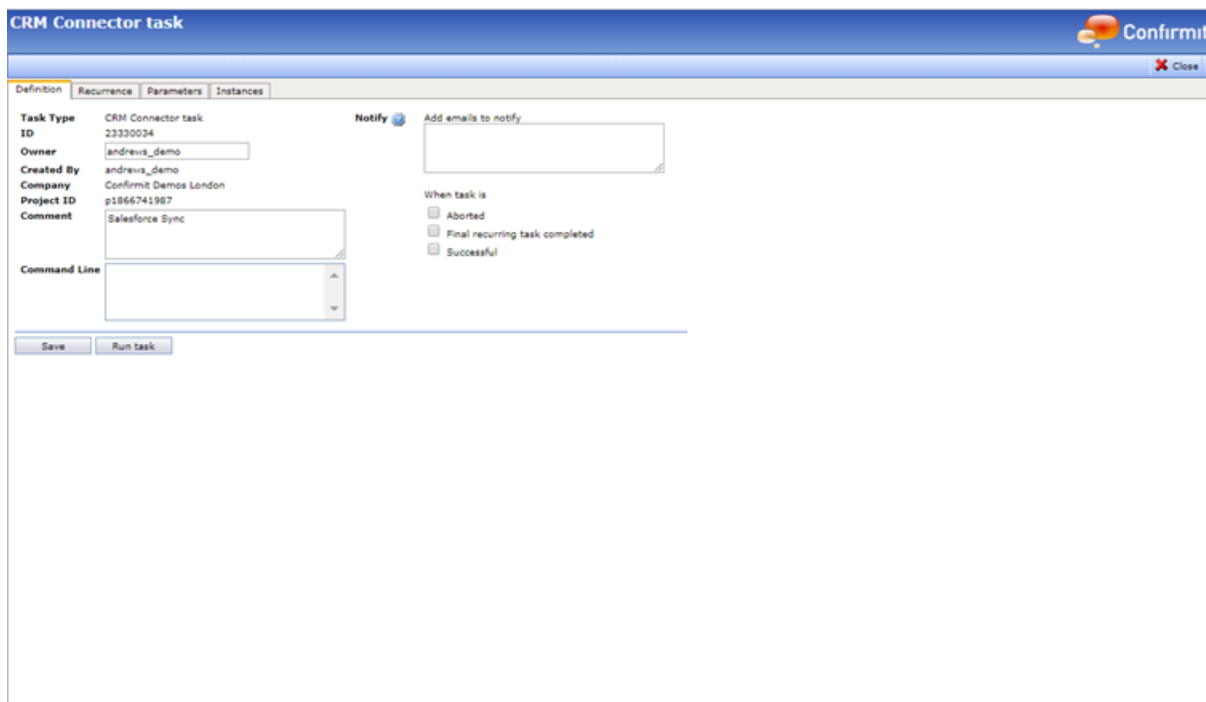


Figure 165 The Task Definition page for the job

2. Select the 'Instances' tab to view the logs from specific tasks that are scheduled or have been run.

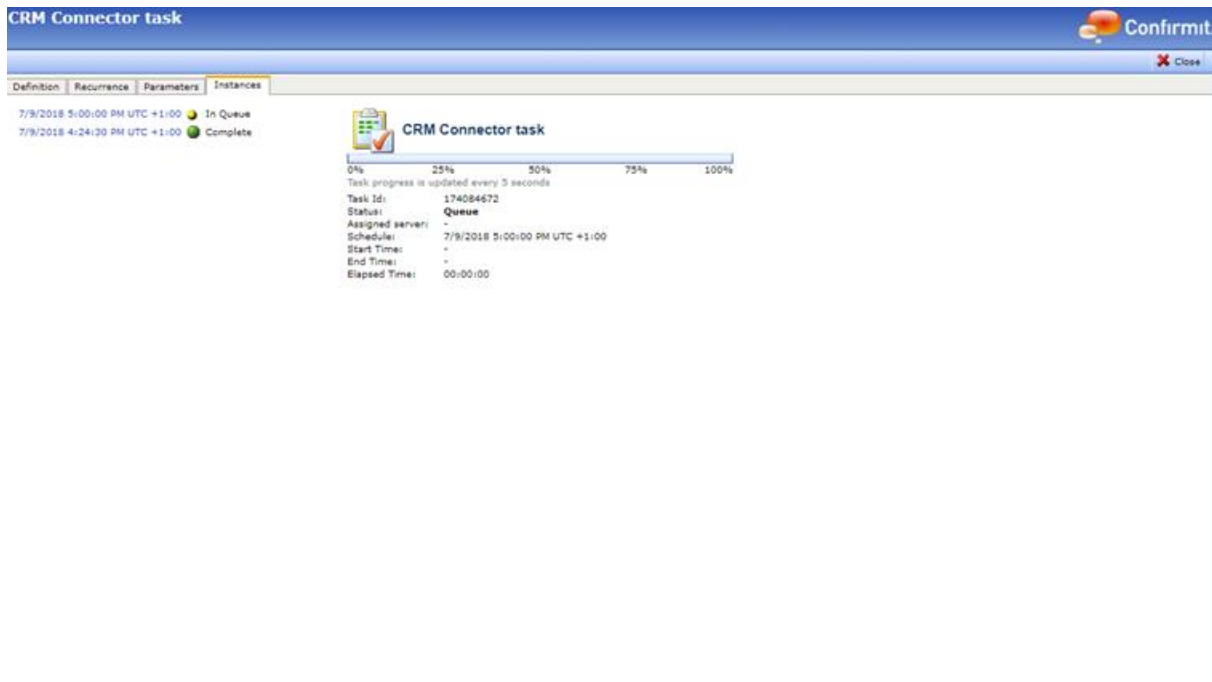


Figure 166 The Instances tab

- Click on a task instance listed on the left side of the window to review the logs of tasks that have completed or failed. These logs have important information for jobs to understand the cause of a failure. The task logs look different for different types of CRM Connector jobs.

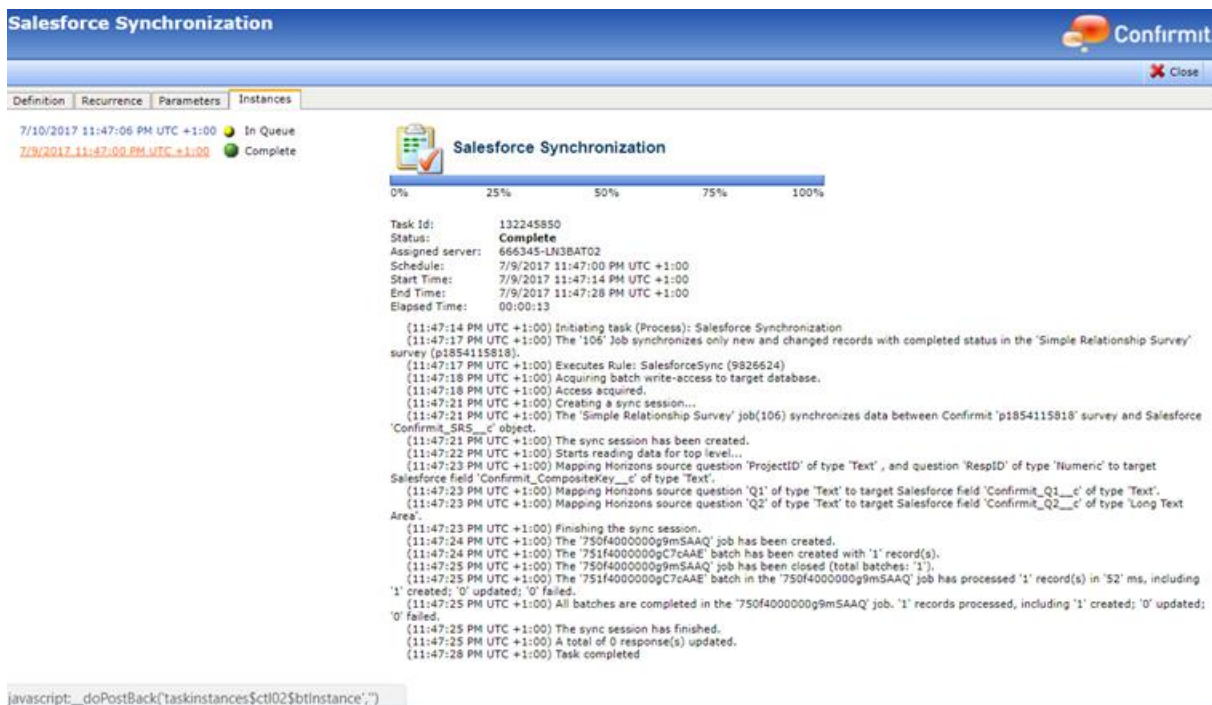


Figure 167 Example of a task log (Confirmit Survey Data to Salesforce) on the Instances Tab

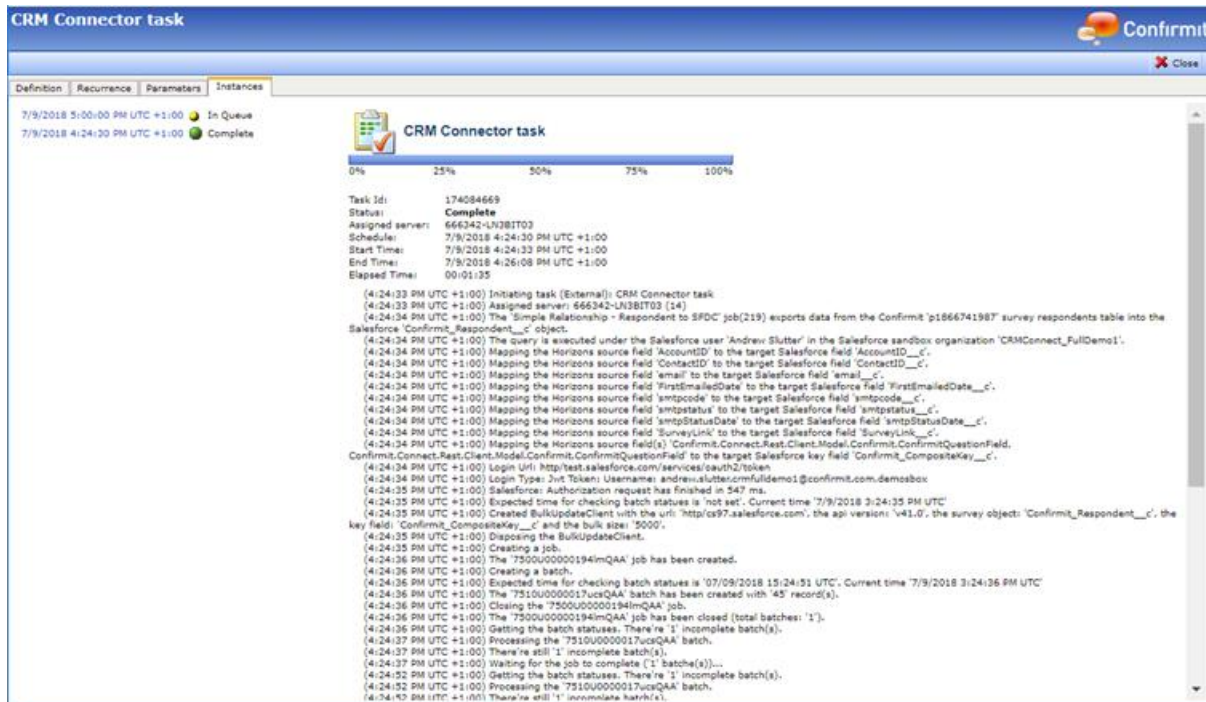


Figure 168 Example of a task log (Confirmit Respondent Table to Salesforce) on the Instances Tab

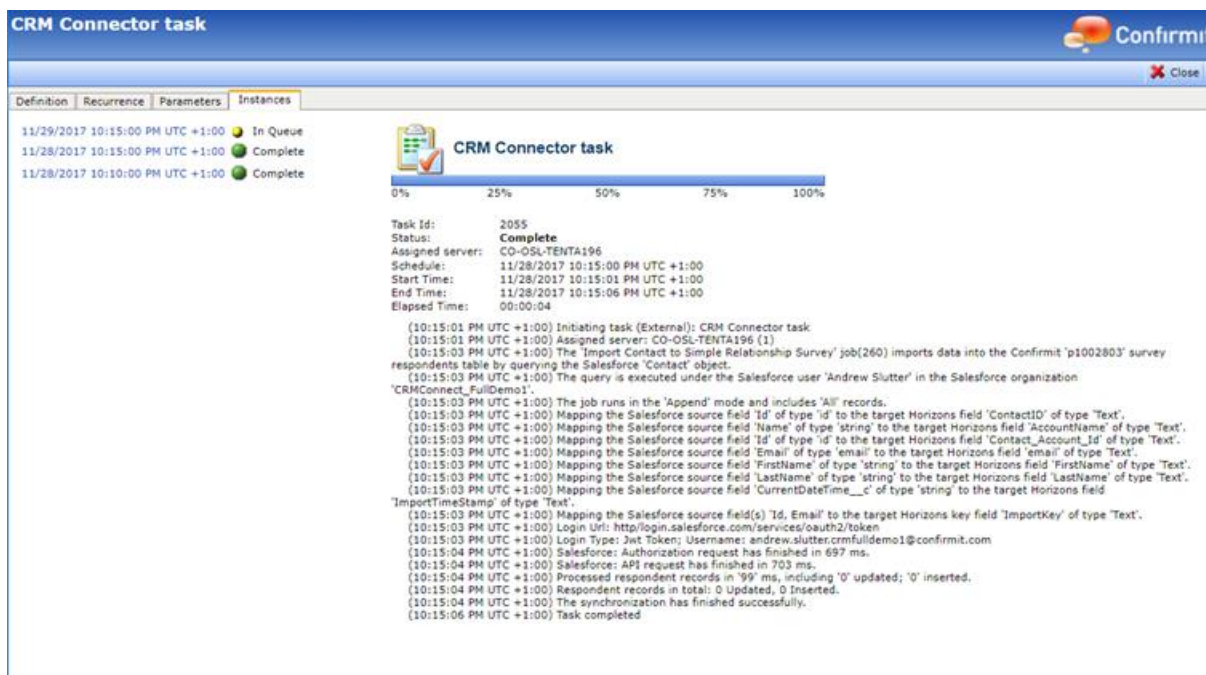


Figure 169 Example of a task log (Salesforce to Confirmit Respondent Table) on the Instances Tab

4.4.1.2. How to Modify an Existing Job Schedule

After setting up a transfer job, you may decide that you need to change when you want the transfer to run.

1. To edit an existing job, select **Task Setup** from the **Actions** drop-down for that job on the Job List page.

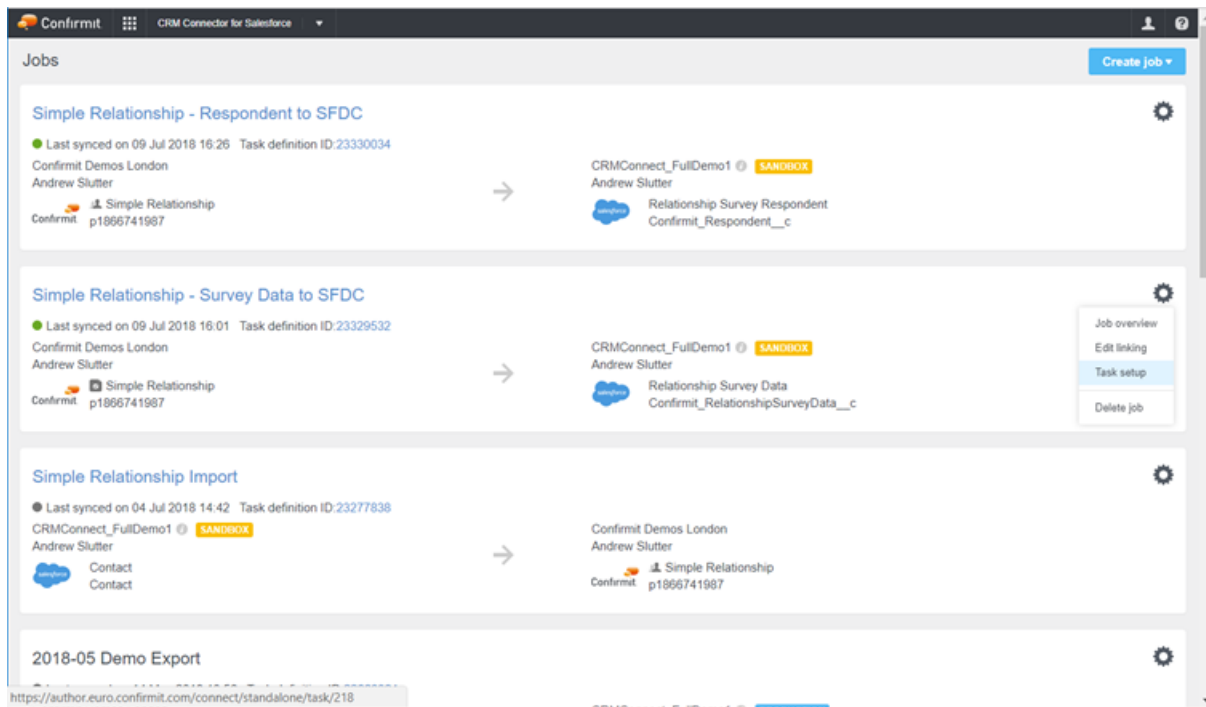


Figure 170 Editing an existing job schedule from the Job List view

2. Make any changes necessary to the task setup.

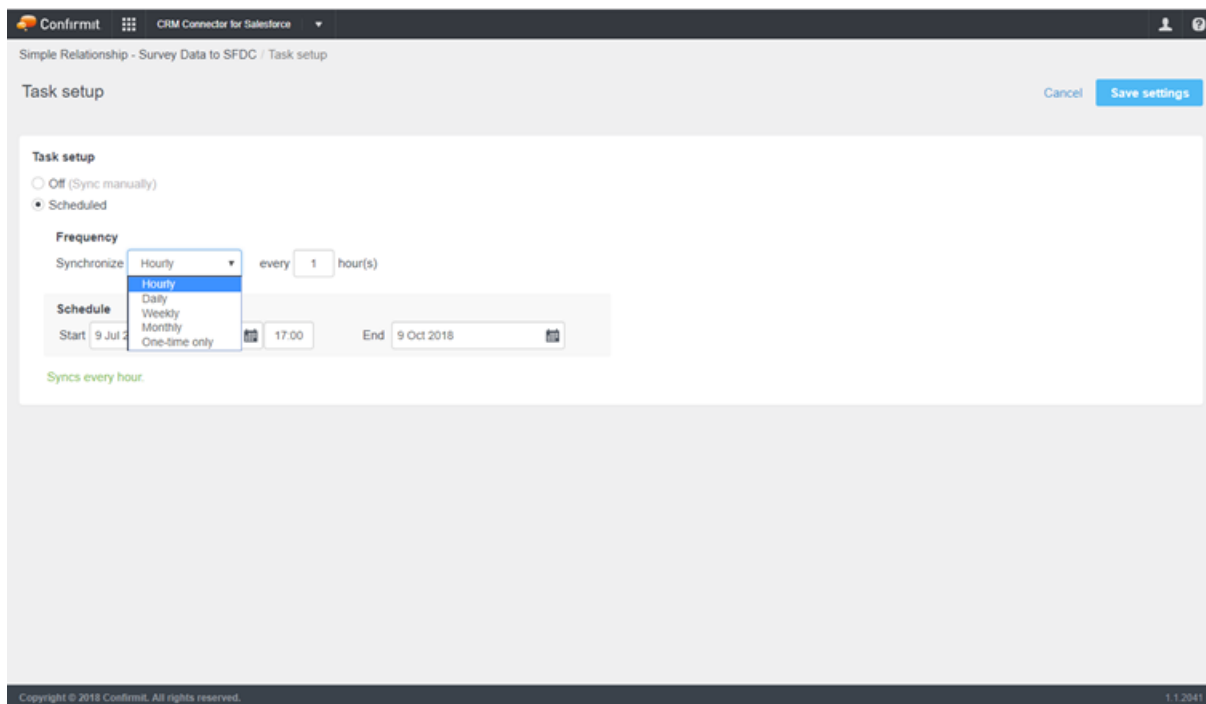


Figure 171 Updating the task setup

3. Review the information.

4. Click **Save settings** to save your changes.

4.4.1.3. How to Delete a Job

To delete a job:

1. Select **Delete job** from the **Actions** drop-down for the relevant job on the Job List page.

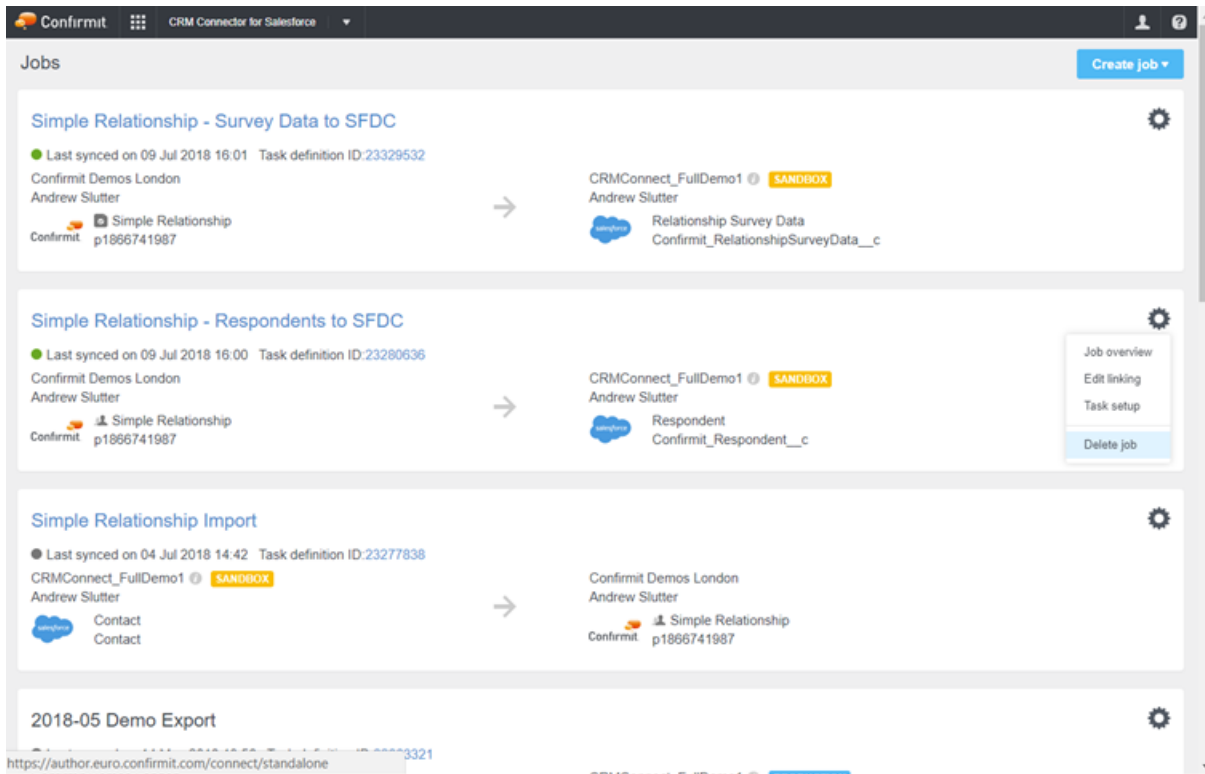


Figure 172 Deleting a job

A confirmation overlay opens.

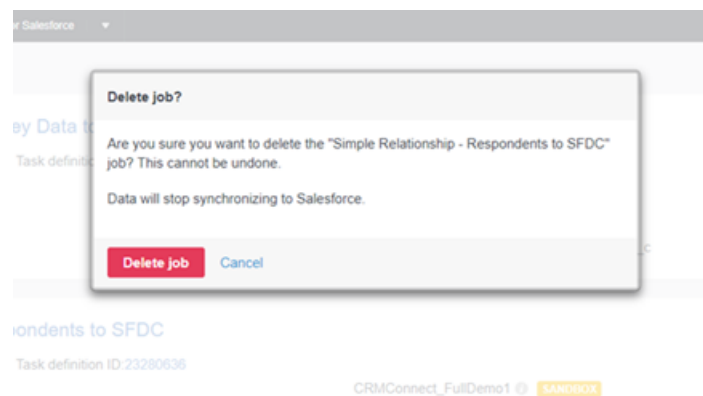


Figure 173 The Delete Job confirmation overlay

2. Click the **Delete job** button to confirm the deletion.

The job information will be deleted, future data synchronization and future synchronization will be canceled. Note that this will not delete the custom survey object in Salesforce, or data that has been imported or exported in the past. If you wish to delete that data, this must be done via the Salesforce platform or the Horizons platform.

4.4.1.4. How to Change the Name of an Existing Job

To rename a job:

1. Select **Job overview** from the **Actions** drop-down for the relevant job on the Job List.

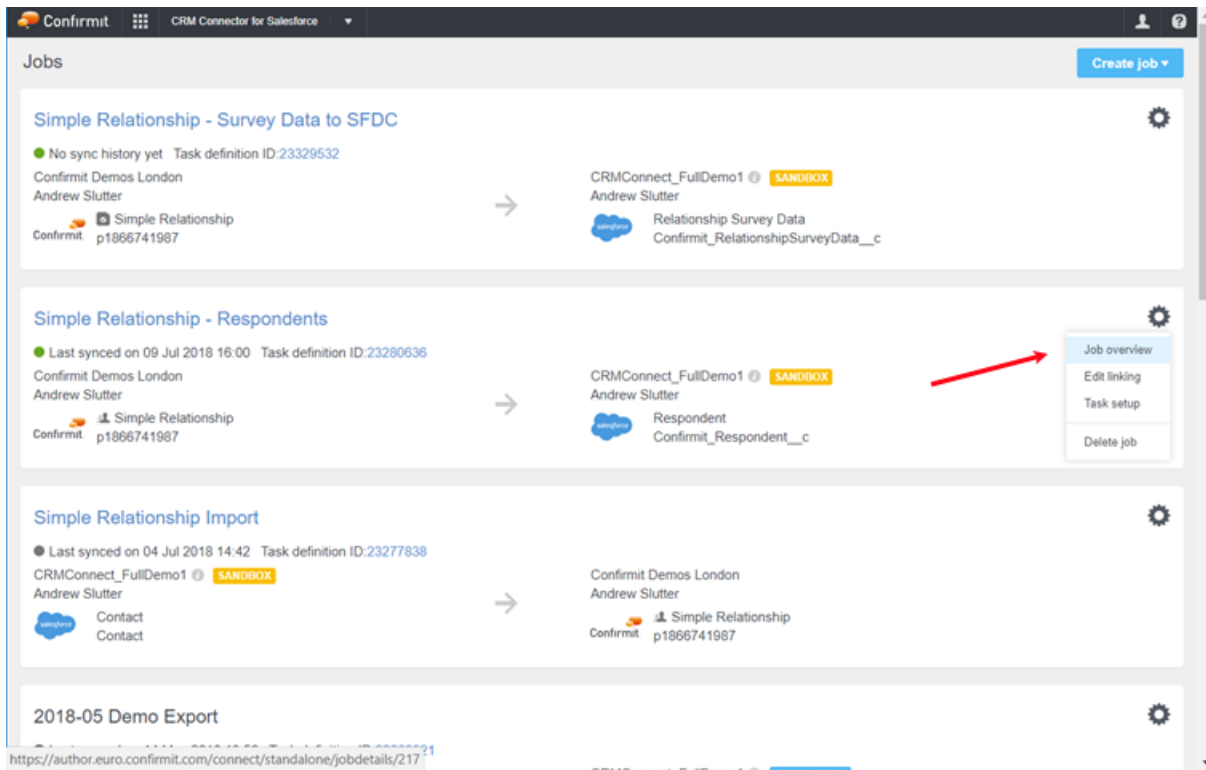


Figure 174 Selecting Job Overview from the job list view

2. Click on the pen icon in the upper-left corner and update the title.

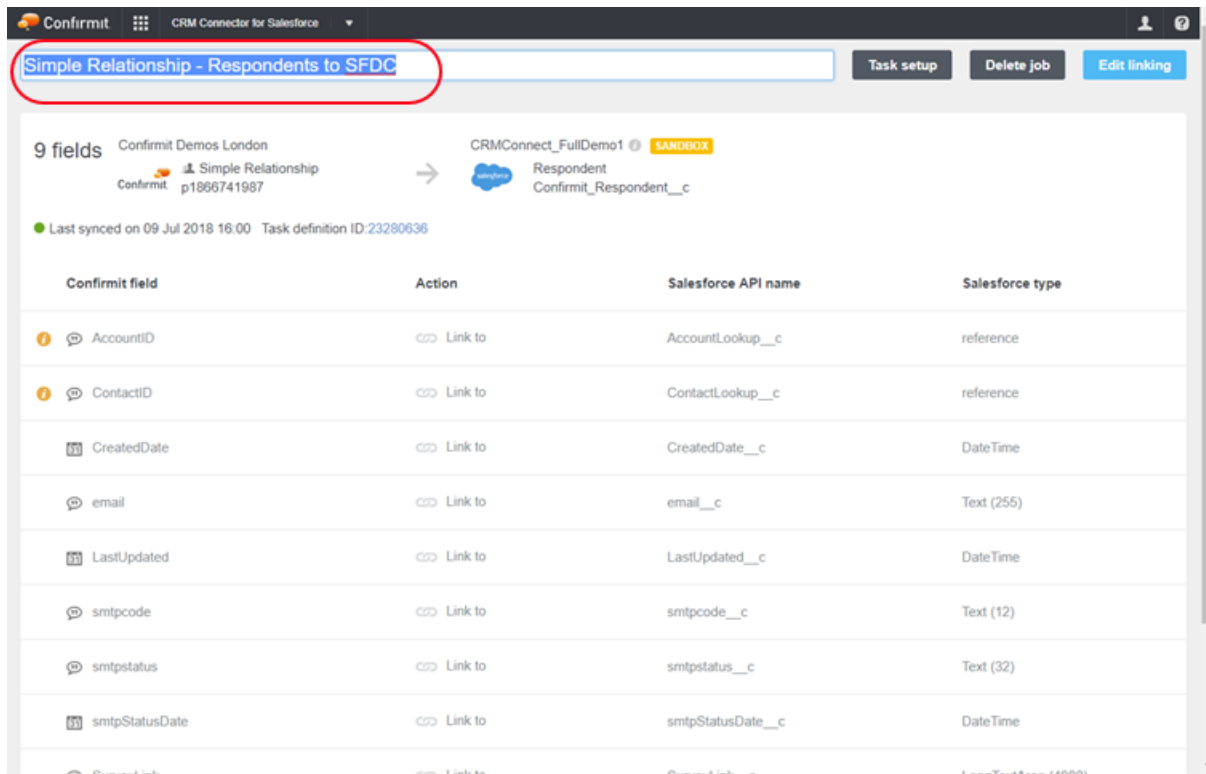


Figure 175 Editing the job name

Your changes will be saved when you click somewhere else on the screen outside of the text editing box.

4.5. Transferring Data from Salesforce to Confirmit (Flex Extension)

Note: The CRM Connector for Salesforce to Confirmit is a company add-on and may be subject to payment. If your company has not licensed the add-on then the option will not be available in the Survey Management > Overview page. Refer to the Confirmit Acceptable Usage Policies (AUP) for further details. Only Chrome and Firefox browsers are currently supported.

This section describes the older of the two possible workflows to import data from Salesforce into Confirmit. New CRM Connector users should not use this workflow but should instead the new workflow (see Transferring Data from Salesforce to Confirmit on page 127 for more information). There are many significant enhancements that are only available within the new workflow, including better stability, security, usability, and flexibility.

The CRM Connector for Salesforce to Confirmit functionality appears as a Flex tab that you can embed as an add-on in a Confirmit online survey. This functionality enables you to transfer data from Salesforce to Confirmit through an easy-to-use setup wizard. Restrictions within Salesforce mean you can register a maximum of five jobs with Salesforce (see the note below), and the CRM Connector system will transfer a maximum of 20000 records per job (see How to Set Up a New Data Transfer Job (Salesforce to Confirmit Respondent Table) on page 128 for more information).

You can for example use this add-on to incorporate existing CRM data such as customer names and email addresses into a Confirmit survey respondent database so that you can then send that survey to those customers.

Note: To use this add-on you will need a Confirmit user with the **SYSTEM_API_ACCESS** permission. Contact your Confirmit system administrator. A dedicated user is provided as part of this feature when it is activated.

Important

Access to your Salesforce data is governed by Salesforce's Acceptable Usage Policies (AUP). To maintain optimum performance and ensure that the Salesforce API is available to all Salesforce customers, Salesforce imposes two types of limits: Concurrent API Request limits, and Total API Request limits. The Concurrent API Request limit restricts the number of jobs that can be run by one user. Currently, no more than five jobs can be registered per username. If a sixth job is created, Salesforce will automatically disable the oldest of the five existing jobs and this one will no longer work. You must therefore keep track of the number of jobs you have registered. Note that other usernames can set up data transfer jobs for the survey so there may be more than five jobs in the Data Transfer Jobs list.

4.5.1. Accessing CRM Connector for Salesforce to Confirmit (Flex Extension)

1. When in the survey to/from which you wish to transfer data, go to the **Survey Management > Overview** page.
2. Go to the **CRM Connect for Salesforce** tab.

The application expects that a valid Confirmit API account is assigned to the Company for the purpose of running the data transfer. This is obtained from Confirmit. In the absence of a valid API account, you will be prompted to supply the login details. Note that you will only need to log in the first time you access the API account. Once you have logged in the first time the information will be stored and will be fetched automatically on subsequent occasions.

Figure 176 The API Login page

3. Type your username and password into the fields and click **Log in**.
The Data transfer jobs page opens.

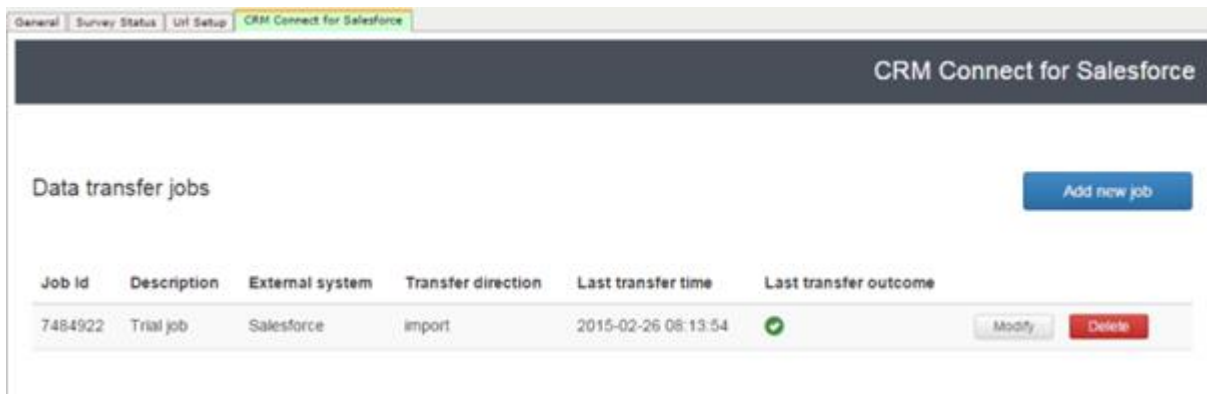


Figure 177 The Data transfer jobs page

This page lists the jobs available to you and enables you to create new jobs, view the logs of and modify or delete existing jobs. The "Last transfer time" tells you when the job was last run, and the "last transfer outcome" tells you whether or not the job was successful. Click the **Last Transfer Outcome** icon for a job to view the job run history for that job (see How to View Data Transfer Jobs (Salesforce to Confirmit Flex Extension) on page 174 for more information).

4.5.2. The Procedures (Flex Extension)

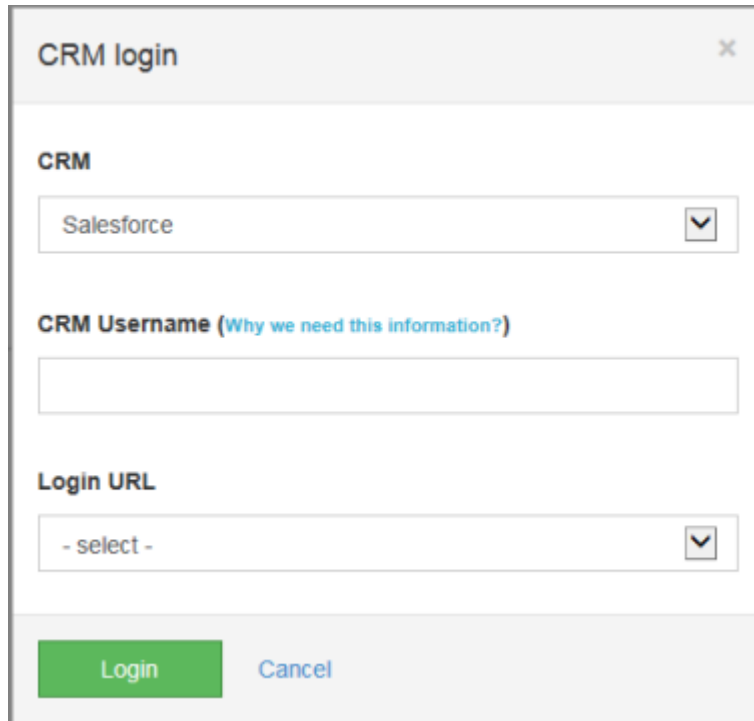
There are five main procedures connected to this functionality:

- Set up a new data transfer job (see How to Set Up a New Data Transfer Job (Salesforce to Confirmit Flex Extension) on page 168 for more information).
- View all the existing data transfer jobs for a given survey (see How to View Data Transfer Jobs (Salesforce to Confirmit Flex Extension) on page 174 for more information).
- Modify an existing data transfer job (see How to Modify an Existing Data Transfer Job (Salesforce to Confirmit Flex Extension) on page 176 for more information).
- Schedule a recurring job (see How to Schedule a Recurring Job (Salesforce to Confirmit Flex Extension) on page 176 for more information).
- Delete a job (see How to Delete a Job (Salesforce to Confirmit Flex Extension) on page 177 for more information).

4.5.2.1. How to Set Up a New Data Transfer Job (Salesforce to Confirmit Flex Extension)

Note: Once the job is run it will set a "last transferred" date on the job to the date it was processed. If you are using a recurring job based on the created date, the job will then only transfer records that are newer than the last transferred date (that is, records created after the job was last run).

1. When in the CRM Data Transfer tab, click the **Add new job** button.
The CRM login overlay appears.



The image shows a 'CRM login' dialog box. It has a title bar with 'CRM login' and a close button. Inside, there's a section labeled 'CRM' with a dropdown menu currently showing 'Salesforce'. Below that is a text input field for 'CRM Username' with a link '(Why we need this information?)'. Then there's a section for 'Login URL' with a dropdown menu showing '- select -'. At the bottom are two buttons: a green 'Login' button and a blue 'Cancel' button.

Figure 178 The CRM login overlay

2. Type in your CRM user name.

Important

Salesforce allows no more than five data transfer jobs to be registered per username. If a sixth job is created, Salesforce will automatically disable the oldest of the five existing jobs and it will no longer work. You must therefore keep track of the number of jobs you have registered. Should your username already have five jobs registered then you can create the job under a different username. Note that other usernames can set up data transfer jobs for the survey so there may be more than five jobs in the Data Transfer Jobs list.

3. Select the login URL that is to be used.

The Login URL will be the URL to the Salesforce login page you wish to use. If your company normally uses one particular login, then your Confirmit administrator can hard-code that URL into the system as the Default URL. If you select Custom URL then you can type the required URL into the field. The Salesforce login overlay opens.

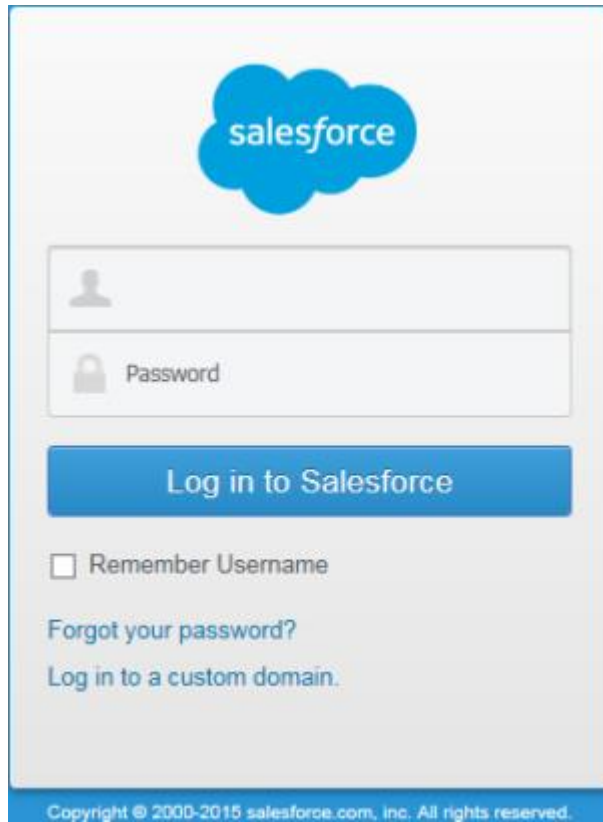


Figure 179 The Salesforce login overlay

4. Add your Salesforce username and password, then click the **Log in to Salesforce** button.
The Select fields page appears.

Figure 180 The Select fields page

5. Add a description. This will appear as the "name" of the job in the job list.
6. Currently, only the Import of data is supported.

Import means that data is transferred from Salesforce into Confirmit. The Import Location lists the objects available in your Salesforce installation. What is available to you will depend on the access permission you have for Salesforce.

Note: You can only connect to one Salesforce location for each transfer job. If you wish to connect to multiple locations, you will need to set up several transfer jobs. Bear in mind that required data can be merged or filtered using Data Processing rules before transfer.

7. Select the location in Salesforce from which the data is to be transferred.
The fields available in that Salesforce location are then listed in the left column. Note that the Salesforce alias for a field name is displayed by hovering the mouse pointer over that field name.
8. In the left column select the fields that you wish to transfer to the respondent database, then click the > button to move the selected fields to the right column.
A maximum of 30 fields can be selected. To select multiple fields press the **CTRL** key while you select the fields. In the event the list is extensive, you can start to type the desired field name and the list will jump to that field.
9. Click **Next**.
The Define page is then presented. Here you define the mappings between Salesforce and Confirmit for the fields that are to be transferred.

General | Survey Status | **Url Setup** | CRM Connect for Salesforce

1 Select ✓ 2 Define 3 Filter 4 Review 5 Activate Previous Next Cancel

Link fields between Salesforce and Confirmit ⓘ

ID	External Field	Alias	Action	Confirmit Field
1	Account ID	AccountId	Link to ▼	▼
2	Email Address	SuppliedEmail	Link to ▼	▼

Figure 181 The Define page with selected Salesforce fields

If your database already includes the necessary fields then you can link directly to those fields. Open the drop-down list in the Confirmit Field column and select the appropriate field. If your database does not include the necessary fields, change the Action for that field to **Create new**, then type a name for the new field into the Confirmit field cell. Note that Confirmit naming conventions must be followed. For example you cannot use a space in the name, and a name can only be used once. In the event the validation check finds a problem, an error message will be displayed. When the job is run, any new fields required will be created in the database. Note that each Confirmit field can be mapped only once in a job.

- On completion click **Next**.

The Filter page opens. Here you can specify which data is to be included, and filter the data for the various fields.

General | Survey Status | **Url Setup** | CRM Connect for Salesforce

1 Select ✓ 2 Define ✓ 3 Filter 4 Review 5 Activate Previous Next Cancel

Set data selection rules

Data to be included ⓘ
All data ▼

Specify custom rules ⓘ
▼ ▼

+ Add new row - Clear all

Figure 182 The Filter page

- Data to be included** - specify which data is to be included in the transfer. Select between all data, only new data or only data that has been changed since the last time the job was run.

Note: Careful consideration should be given to the option selected here. Transferring all data each time a job is run will use considerable resources and can take time, so you should select to transfer only new or changed data when possible. Refer to the Confirmit AUP for further information.

- **Specify custom rules** - here you can filter the data for each field individually. In the first cell select the field you wish to apply a filter to, in the second cell select the type of operator, and in the third cell add the appropriate value. Add and set up a new row for each custom rule you wish to use. Note that some types of operator only apply to numerical data; if you set an unacceptable operator then an error message will be displayed when you click **Next**. Note that additional rules will be combined with the AND operator.

11. On completion click **Next**.

The Review page opens. Here you can check your selections and settings to ensure the correct data will be transferred. In the event you need to change anything, click Previous to return to the previous step in the procedure.

General Survey Status Url Setup CRM Connect for Salesforce

1 Select ✓ 2 Define ✓ 3 Filter ✓ 4 Review 5 Activate

Previous Save Cancel

Please take a moment to review your job setup before you activate it

Fields selected for transfer

Account ID Email Address

Salesforce - Confirmit field mapping

1 Account ID		acnumber
2 Email Address		emailaddress

Data transfer conditions

Data selected is alldata

Figure 183 The Review page

12. When you are sure the setup is correct, click **Save**.

The Activate page opens. Here you activate the job; you can process the job immediately or you can schedule it for a later time.

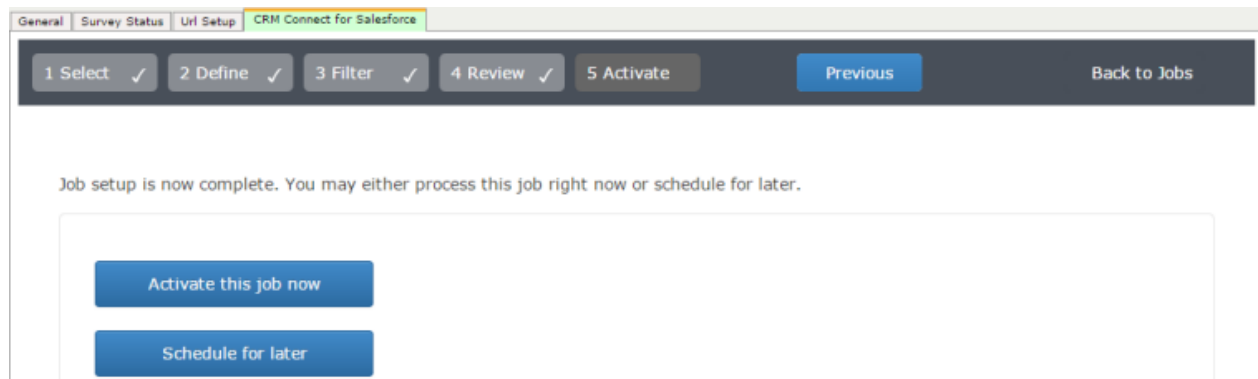


Figure 184 The Activate page

If you wish to schedule the job for later, you can then also make the job recurring such that it will repeat at specific dates, times or intervals (see [How to Schedule a Recurring Job \(Salesforce to Confirmit Flex Extension\)](#) on page 176 for more information).

If you activate the job, a Job execution log is displayed informing you of the progress.

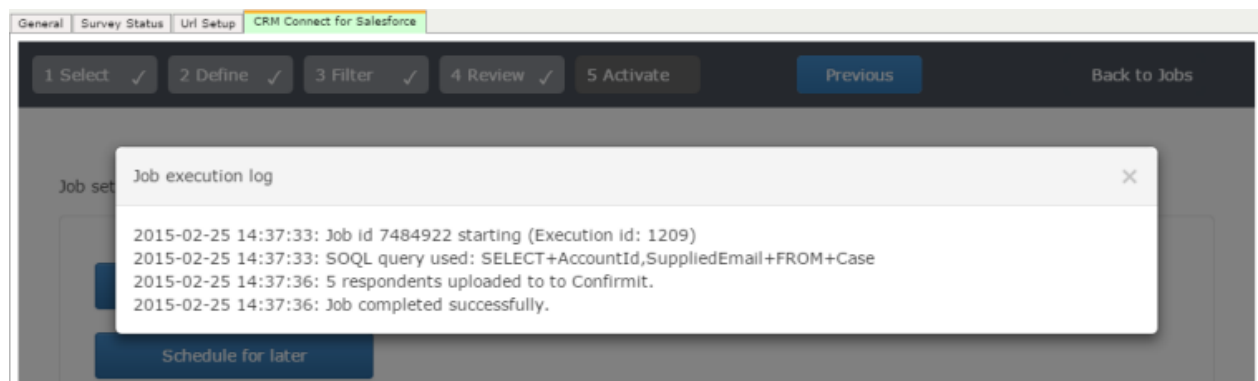


Figure 185 Example of the Job execution log

Click anywhere in the Activate page to close the log (you do not have to wait until the job is completed to close the window, but it provides a good overview of progress) then click **Back to Jobs** to return to the Data Transfer Jobs page. Note that you can view the information at any time by clicking on the Last transfer outcome icon for the job in the Data Transfer Jobs page.

4.5.2.2. How to View Data Transfer Jobs (Salesforce to Confirmit Flex Extension)

The Data Transfer Jobs page lists all the jobs that exist for the current survey (maximum five jobs).

Here you can click the **Last Transfer Outcome** icon for a job to view the job run history for that job.

General Survey Status Url Setup CRM Connect for Salesforce

Back to jobs

CRM Connect for Salesforce

Executed jobs

Number of rows

10

Search:

Job Id	Description	External system	Transfer direction	Transfer date	Message	Records transferred
7484922	Trial job	Salesforce	import	2015-02-26 08:13:53	2015-02-26 08:13:53: Job id 7484922 starting (Execution id: 1232) 2015-02-26 08:13:53: SOQL query used: SELECT+Accountid,SuppliedEmail+FROM+Case 2015-02-26 08:13:54: 5 respondents uploaded to to Confirmit. 2015-02-26 08:13:54: Job completed successfully.	5
7484922	Trial job	Salesforce	import	2015-02-26 08:03:36	2015-02-26 08:03:36: Job id 7484922 starting (Execution id: 1231) 2015-02-26 08:03:36: Processing error: Job execution started within 120 seconds of last instance. Please wait before rerunning the job.	-
7484922	Trial job	Salesforce	import	2015-02-26 08:03:25	2015-02-26 08:03:25: Job id 7484922 starting (Execution id: 1230) 2015-02-26 08:03:25: SOQL query used: SELECT+Accountid,SuppliedEmail+FROM+Case 2015-02-26 08:03:26: 5 respondents uploaded to to Confirmit. 2015-02-26 08:03:26: Job completed successfully.	5
7484922	Trial job	Salesforce	import	2015-02-25 14:37:32	2015-02-25 14:37:33: Job id 7484922 starting (Execution id: 1209) 2015-02-25 14:37:33: SOQL query used: SELECT+Accountid,SuppliedEmail+FROM+Case 2015-02-25 14:37:36: 5 respondents uploaded to to Confirmit. 2015-02-25 14:37:36: Job completed successfully.	5

Showing 1 to 4 of 4 entries

Previous

1

Next

Figure 186 Example of the Executed jobs page for a job

This page holds a row for each time the job has been executed. The total number of entries for the job (i.e. the number of times the job has been executed), and the total number of pages in the list are given, and you can set the number of rows that are to be presented on each page. Move to the next or previous pages in the list using the buttons in the lower-right corner.

In the event the list is extensive you can use the Search field to find the job you are looking for. Start typing an alpha-numeric text string into the field; any entry that does not include that text string will be removed from the list as you type.

You can sort the list into alpha-numeric order by any header; click a header to sort by that header, click again to reverse the sort order.

Click **Back to jobs** in the upper-left corner of the page to return to the Data transfer jobs list.

4.5.2.3. How to Modify an Existing Data Transfer Job (Salesforce to Confirmit Flex Extension)

In the **Survey Management > Overview** page, go to the CRM Connect... tab. All the data transfer jobs associated with the survey are listed here. Click the **Modify** button for the job you wish to modify - the Select page opens. This is the first page of the setup procedure (see How to Set Up a New Data Transfer Job (Salesforce to Confirmit Respondent Table) on page 128 for more information). You can now work your way through the procedure and modify the details as required.

4.5.2.4. How to Schedule a Recurring Job (Salesforce to Confirmit Flex Extension)

Once you have set up a job you can activate it immediately or you can schedule it to run at a later time. If you wish to schedule the job to run later, you can then also make the job recurring such that it will repeat at specific dates, times or intervals. Note that scheduling a job to run later, and/or recurring, does require some additional setting up within Data Processing (see Example of Transferring Data on page 72 for more information).

1. In Data Processing, create a rule with Source and Target type set to **Survey Database**.
2. In the Source tab:
 - o Ensure the correct project ID is selected.
 - o In Columns, click on **Select Columns**, select all questions and click **Finish**.
3. Go to the CRM Connect job and click **Schedule for later**.

An overlay opens presenting some script and a description of what to do with it. This script will enable the DP rule you have created to find the job you have set up for the CRM system, and must be copied into the rule you are creating.

Schedule for later - copy code ✕

Copy the code below to set up a recurring rule in **Data Processing**.

```
AddLogWarning("Initiating CRM data transfer. This may take a few minutes. The task log will be updated when the process completes.");
var logMessages = ConfirmitCrmConnector.ProcessData("a8meGyeyK/PYQ4e4TNRtNb3QqM36qzj4llkUqJ39jk=");
for(var i = 0; i < logMessages.length; i++) {
    var logMessage : String = logMessages[i];
    AddLogMessage(logMessage);
    if(logMessage.Contains("Processing error:")) throw new Exception(logMessage);
}
```

- Click on **Data Processing** from the top Confirmit menu.
- Click on **New Rule** option at the top right hand corner within your Rule List. When the New Rule Window appears, follow these steps:
- In the **General tab**: Generate a new rule with Source and Target Type **Survey Database**.
- In the **Source tab**:
 - Make sure the correct project id is selected.
 - In Columns, click on **Select Columns**, select all questions and click Finish.
- In the **Action tab**:
 - Copy the script specified in the last page of the CRM connector to Global script.
 - Click on Execute and select **Start time** ⚙ Schedule for later execution.
- In the **Recurrence tab**:

Figure 187 Example of the script to be copied

4. Copy the script to your clipboard.
5. Return to the rule you have created in point 1 above, go to the Action tab and paste the script you have copied into the **Global script** area.

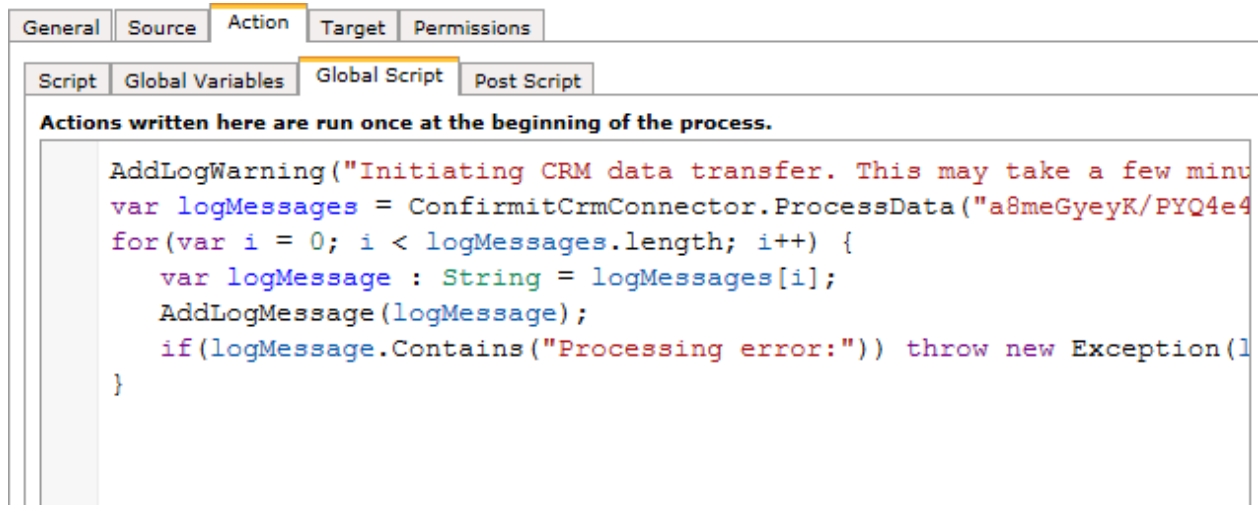


Figure 188 Pasting the script into the Action tab > Global Script field

6. Save the changes, then click **Execute** and select Start time to be **Schedule for later execution**.
7. In the Recurrence tab, set **Recurring Task** to **Yes** and set up the recurrence pattern as required.
8. Save the changes.

4.5.2.5. How to Delete a Job (Salesforce to Confirmit Flex Extension)

Jobs that are no longer required may be deleted. To do this:

1. In the Data transfer jobs page, find the job you wish to delete and click the **Delete** button.
The Confirm Job Deletion overlay appears.

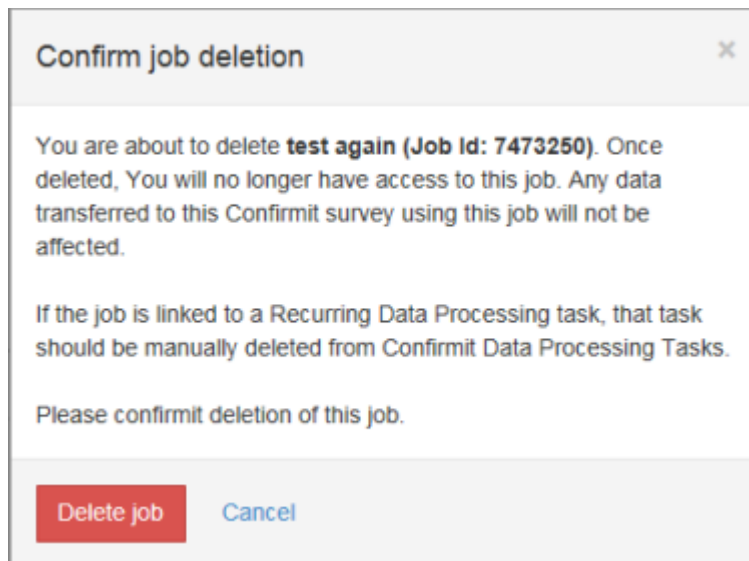


Figure 189 The Confirm Job Deletion overlay

2. Ensure you are deleting the correct job, then confirm the deletion by clicking **Delete job**.
The job is deleted and the Data transfer jobs list is updated.

5. Technical Details

The following sections provide further technical details.

5.1. Survey Source

The Confirmit Survey Source reads responses from one or more surveys. Multiple surveys can be chosen either by selecting them from a list of surveys, or by setting a keyword filter. The keyword filter will match any survey that is assigned a particular category/keyword in the Project Overview page in Confirmit. Refer to the Authoring User Guide for more information.

Incremental Updates

The source supports incremental read mode. This means that only changed or new responses for a survey (since the rule was last executed) will be included in the buffer. The matching is based on the “last touched” column in the response control table. If this value is later than the last executed time for the rule (for this particular survey), then the response is included in the buffer.

Note: Incremental Updates are only applicable to recurring tasks - non-recurring tasks will include all data subject to the data filters on the Source tab.

Note: This setting will have no effect in a rule with the same source/target survey ids where Execution Mode is set to ‘Update Data’ because the previous execution of the rule will have updated the ‘last touched’ column and therefore on the next execution the records will be included again since their ‘last touched’ value is later than the previous execution of the rule.

Multi Source Surveys

When selecting multiple survey sources using the keyword filter, new surveys may be included that were not part of the source during the previous execution. For these new surveys, all responses will be read, even if the source is set to incremental read mode, as they will not have been synchronized before. The multiple-survey source will transfer data from one survey at a time. If a transfer for a survey fails, the task will be aborted.

Survey data will not be removed from the destination, even if the survey is removed from Confirmit. The only way to remove the data is to clean the destination and to schedule a complete transfer of all sources.

Note: Executing the rule for Multi Source Survey transfers requires considerable resources and it will take a considerable time to run (in extreme cases several hours). In addition, Confirmit cannot guarantee that Multi Source Surveys including more than 20 surveys will function correctly. Multi Source Survey transfers should therefore be limited to a maximum of 20 surveys.

Uncommitted Reads

In order to achieve maximum performance, the Confirmit Source will read uncommitted data and will not use any transactional locking mechanisms.

5.2. Survey Target

The Confirmit Survey Target writes data from one of the supported sources. It uses two different modes for matching rows:

- With a Confirmit Survey as the source, it will use the rowguid in the response control table to match the rows.
- When a Triple-S data file is being imported to Survey Data, if the user selects responseid as the key field then it will be used.

The target will identify whether the row is a new row or an existing row. In the event the row is new, the target will create a new response with corresponding response control values. If the row exists, the target will update the values for the columns provided.

Bulk Inserts and Table Updates

To improve performance, the Confirmit Survey Target will first perform a bulk insert of all the data into a temp table. The target will then identify which rows are new and which rows already exist in the survey. The process of moving (insert or update) the data from the temp table to the actual response tables completes the procedure.

5.3. Validation Rules

Survey Data schemas (templates) hold the meta information about target and source: Which variables are to be read from the source and updated in the target, the variable types, answer lists etc. When running a rule, with data flowing from the source to the target, some validation must be done to verify that the schemas match.

There may be different templates for source and target, and there may be differences between the templates and the survey databases when the source or target is a Confirmit survey database. When a rule is run, three basic validation checks are performed:

1. If the source is a Confirmit database and a template is used, the source database is checked against the template.
2. The source template is compared with the destination template.
3. If the target is a Confirmit database, the target database is checked against the template.

These three checks are run for both the variables (questions) and the answers in the data file. As one of the main benefits of using the templates is to reduce the number of variables processed in the data processing rule to optimize performance, it is not an issue if there are more variables in the survey database than are described in the template. This process reduces the volume of data to be transferred and thereby speeds up the export/import task. However the following situations may cause issues and will by default make a data processing rule abort:

- **The template used in the source lists more variables than are available in the source database.**

By default, if this validation returns an error, the data processing rule execution will abort. However you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. Variables that are missing in the source database will then be available in the source template, but will be empty (no values).

- **The answer lists in the Survey Data template used in the source do not match the answer list in the source survey database.**

By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. The values stored for these variables will then be read even though they do not match the answer list in the template.

- **The variable type in the template used in the source does not match the variable type defined in the source database.**

If this validation returns an error, the data processing rule execution will abort. This validation can not be overridden.

- **The template used in the target lists more variables than are in the target survey database.**

By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. No attempt will be made to write anything into the target database for variables that do not exist in the database.

- **The answer lists in the template used in the target do not match the answer list in the target survey database.**

By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. The rule executor will then write the values to the database even though there is a mismatch between the answer list in the template and the database.

- **The variable type in the template used in the target does not match the variable type defined in the target database.**

If this validation returns an error, the data processing rule execution will abort. This validation can not be overridden.

For a rule with a survey database in both the source and the target, it is possible to specify different Survey Data templates for the source and the target. For other combinations, the template will either be inherited from source to target (as in Triple-S import to survey database) or inherited from target to source (as in Triple-S export from survey database). With both a template for source and a template for target, the following situations may cause issues:

- **The template used in the target lists more variables than the template used in the source.**
By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. Variables that are missing in the source template will then be empty (no values).
- **The answer lists in the template used in the source do not match the answer list in the target template.**
By default, if this validation returns an error, the data processing rule execution will abort. However, you can override this rule and log a warning instead of aborting the task, or even switch off this validation check completely. The rule executor will then write the values to the database even though there is a mismatch between the answer list in the two templates.
- **The variable type in the template used in the source does not match the variable type defined in the target template.**
If this validation returns an error, the data processing rule execution will abort. This validation can not be overridden.

As mentioned, for some of the validations, you have three possible choices:

- An error is raised and the process stops (strict handling) - this is the default setting and will apply if you do not make any other selections.
- You can switch off validation and allow the process to continue - check the **Allow variables ...** and/or **Allow answers ...** boxes (see the figure below).
- You can choose that the process continues but also display a warning - check the **Allow variables ...** and/or **Allow answers ...** boxes and also the appropriate **Show warning** boxes (see the figure below).

You make these selections in the **Validation setting** properties on the Source (see Source Type > Survey Database on page 49 for more information), the Target (see Target Type > Survey Database on page 66 for more information) and the General (see The General Tab on page 41 for more information) tabs for the Current Rule in the event the source type selected is Confirmit Survey Data.

Validation setting

☐ Allow **variables** in the template that do not exist in the database

☐ Show warning

☐ Allow **answers** in the template that do not exist in the database

☐ Show warning

Figure 190 The Validation Setting options

The validation process will be performed before the SSIS package (rule) is executed. If a survey does not conform to the schema and the default settings are in force, data for the survey will not be transferred and a warning will be recorded in the log.

Note: All the variables in the source and target must be of the same type. This requirement may not be overridden.

5.4. The Bitstring Format

Data is recorded with one character per category of the corresponding variable. A character '1' is used to signify that a category has been selected, a character '0' signifies that a category is not selected. The category value refers to the relative position of the 0/1 code in the data field: thus a category value of 9 will always refer to the code in the 9th location of the data field even if some lower category values have not been defined. An import program should ignore the locations of undefined category values.

The data field length is the highest category value in the associated <value> or <range> elements. This means that with for example nine category values, nine fields in the data will be used. Using this storage type, Multi variables with long category lists will require a large data field length. In these cases you are recommended to use Spread instead (see The Spread Format on page 181 for more information). This can be selected as Multiple format when generating the template, or assigned to one particular variable or a group of variables in the Template Editor.

If the data field length is less than the <position> element then it is assumed to be left-justified within the locations defined by the position. Export programs should ensure that any extra columns contain blanks or zeros.

Note that in a CSV data file, any data field representing a bit-style multiple which begins with "0" (zero) should always be delimited with double-quote characters. For example, for Triple-S XML version 2.0:

Data value	Maximum in <values> element	<position> element	Data record b=space, x=space or zero
1	1 to 9	start="21" finish="29"	100000000
1	1, 2, 3 and 9	start="21" finish="29"	100xxxxx0
1,3	1 to 12	start="21" finish="32"	101000000000
none	1 to 99	start="21" finish="120"	000000000...0
2,8	1 to 9	start="21" finish="30"	010000010b or 0100000100
2	1, 2, 3 and 9	start="21" finish="24"	illegal
missing	1 to 9	start="21" finish="29"	bbbbbbbbbb
missing	1, 2, 3 and 10	start="21" finish="30"	bbbxxxxxb
1	1 to 9	start="5" (csv format)	100000000 or "100000000"
2,8	1 to 9	start="5" (csv format)	"010000010"

5.5. The Spread Format

The Spread format will generate a Triple-S XML template in which data is recorded as a series of sub-fields each containing one category value of the variable. The category value is recorded as an integer number as described in the <values> element. The number 0 should be used to represent sub-fields that are not needed.

The data sub-field length is the minimum number of characters required to represent the largest value in the values block. Thus variables with values up to 9 have a data sub-field one character long, variables with values up to 99 have a data sub-field length of 2, and so on. If any particular data value requires less than the maximum for the sub-field, it should be right justified using leading space or zero characters as padding. Data values may be stored in any or all sub-fields.

If the data sub-field length is less than the sub-field defined in the <spread> element then it is assumed to be right justified within the width defined in the spread. Export programs must ensure that extra columns contain blanks or zeros within the sub-fields.

If the total width of the sub-fields is less than that defined in the <position> element, then the sub-fields are stored consecutively, left-justified within the locations defined by the position. Export programs must ensure that any extra columns contain blanks or zeros. For example, for Triple-S XML version 2.0:

Data value	Maximum in <values> element	<spread> element	<position> element	Data record b=space
1	1 to 9	subfields="2" width="1"	start="21" finish="22"	10 or 01
1	1, 2, 3 and 9	subfields="2" width="1"	start="21" finish="22"	10 or 01
1,3	1 to 9	subfields="2" width="1"	start="21" finish="22"	13
1	1 to 9	subfields="2" width="2"	start="21" finish="24"	b1b0 or b0b1 or 0100 etc

none	1 to 9	subfields="2" width="1"	start="21" finish="22"	00
2	1, 2, 3 and 9	subfields="2" width="1"	start="21" finish="24"	20bb or 02bb or 2000 etc
1,42	1 to 999	subfields="2" width="3"	start="21" finish="26"	001042
missing	1 to 999	subfields="2" width="3"	start="21" finish="26"	bbbbbb
1	1 to 9	subfields="2" width="1"	start="4" (csv format)	1 or 10 or "10" or "01"
1	1 to 99	subfields="2" width="2"	start="4" (csv format)	"0100" or "0001"

5.6. Confirmit Tags

Confirmit has introduced extensions to the Standard Triple-S XML to facilitate internal Data Processing processes. If you wish an overview over the Standard definitions, go to the Website of the Triple-S Consortium.

<http://www.triple-s.org/>.

The extensions can be identified in the Triple-S XML with the prefix **confirmit**:

A list of the introduced extensions is available in Appendix A (see Appendix A: Introduced Extensions on page 183 for more information).

Confirmit accepts numbers, letters and underscore (_) in codes on Multi questions, but the Triple-S multiple variable type only accepts numeric codes. On Multi questions with non-numeric characters in the codes, the codes will be recoded into numeric characters for the Triple-S codes in the answer list (both in schema and data).

Note: If you only ever use numeric codes in Multi questions, you will avoid this issue.

However, when moving data between Confirmit surveys, or out of Confirmit for external changes and then back in to a Confirmit survey again, the link to the original codes in the Confirmit survey must be retained. Confirmit has therefore made an extension to Triple-S. A multiple variable with non-numeric codes will then look as follows in the schema (template) file:

```
<variable ident="1" type="multiple">
<name>q1</name>
<label>Car brands</label>
<position start="100" finish="105" />
<values>
<value code="1" confirmit:precode="a">Ford</value>
<value code="2" confirmit:precode="b">Chrysler</value>
<value code="3" confirmit:precode="c">Volvo</value>
<value code="4" confirmit:precode="d">BMW</value>
<value code="5" confirmit:precode="e">Honda</value>
<value code="6" confirmit:precode="f">Toyota</value>
</values>
</variable>
```

You may choose not to include these Confirmit tags in the file in case it causes issues for some importers. To do this, use the Triple-S XML (Standard) export box when exporting a template (see How to Export a Template on page 13 for more information).

Appendix A: Introduced Extensions

Confirmit has introduced extensions to the Standard Triple-S XML to facilitate internal Data Processing processes. If you require an overview over the Standard definitions, go to the Website of the Triple-S Consortium:

<http://www.triple-s.org/>.

Export to Triple-S XML changes	Confirmit extensions
confirmit:routingid	
confirmit extensions :formtype	confirmit:formtype="numeric" confirmit:formtype="opentext" confirmit:formtype="date" confirmit:formtype="time" confirmit:formtype="single" confirmit:formtype="multi" confirmit:formtype="ranking" confirmit:formtype="numericlist" confirmit:formtype="opentextlist" confirmit:formtype="grid"
confirmit extensions :formlabel	confirmit:formlabel="TextForSingle"
confirmit extensions :questioncategory	confirmit:questioncategory="qCat4Single"
confirmit extensions:precode	confirmit:precode="SingleOther"
confirmit extensions :other	confirmit:other="true"
confirmit extensions: source	confirmit:source="p0205105"
confirmit extensions: formname	confirmit:formname="interview_start" confirmit:formtype="date" confirmit:formname="interview_start" confirmit:formtype="time" confirmit:formname="interview_end" confirmit:formtype="date" confirmit:formname="interview_end" confirmit:formtype="time" confirmit:formname="last_touched" confirmit:formtype="date" confirmit:formname="last_touched" confirmit:formtype="time" confirmit:formname="lastcomplete" confirmit:formtype="date" confirmit:formname="lastcomplete" confirmit:formtype="time"
confirmit extensions: loopid	confirmit:loopid="l1"
confirmit extensions:parentname, parentlabel, parenttype	variable ident="36" type="character" confirmit:formname="q15" confirmit:formlabel="Text for Open Text List inside 3DGrid" confirmit:formtype="opentextlist" confirmit:parentname="g10" confirmit:parentlabel="3DGridText" confirmit:parenttype="3Dgrid" confirmit:questioncategory="QCopenTextListIn3DGrid" confirmit:source="p0205105" confirmit:precode="3dgridPre1">

Appendix B: List of Data Processing Examples

Example

1. Cross-referencing city name and zip-code
2. Calculating numeric age and age-band
3. Importing data from single questions into a grid
4. Setting a group of variables to NULL
5. Copying a multi question into a different multi question
6. Aggregating codes from several single questions into a multi question
7. Copying the data from questions

Index

>

> Delimited Text File, 44

A

Accessing CRM Connector, 116, 167
 Accessing the Wizard
 AppExchange Version, 123
 Horizons Version, 122
 Action scripts, 102
 Action Tab, 53
 Script Examples, 111
 Add a Rule to the Rule Set, 81
 Add Variables to the Template, 29
 Administrate, 16
 Administrator
 rights, 89, 99
 Aggregating codes from several singles, 114
 Answer Codes as Labels, 57
 Append Data, 62, 68
 Appended at end, 56, 58, 61, 64, 65
 AppExchange Version, 123
 As filter (Target variables match source variables), 69
 As in Questionnaire, 56, 58, 61, 64, 65
 Assign new Range Values to a Variable, 35
 Available Functions, 102

B

Back Up a Template, 29
 Bitstring, 9
 Bitstring Format, 180

C

Calculating numeric age and age-band, 111
 Change the Name of an Existing Job, 165
 Changing a Multi Variable, 34
 Character Encoding for Data File, 63
 Cleaning data, 1
 Clear existing data, 67
 Columns, 68
 Confirmit Survey Database, 67
 Confirmit Tags, Exclude, 182
 Convert Source variables to new Target variables, 69
 Copying a Multi Question into a Different Multi Question, 113
 Copying the data from questions, 114
 Create
 a New Data Central Rule, 90
 a New Rule, 85
 a New Rule Set, 86
 a New Template, 6
 New Rule, 92
 Create a New Template, 6
 Creating a Default Template, 11

CRM Connect, 167
 CRM Connector, 116
 Cross-referencing city name and zip-code, 111
 Current Rule, 40
 Permissions tab, 72
 Set, 78
 Set Permissions tab, 83
 Custom
 Delimiter, 56

D

Data
 Processing, 1, 84
 Menu, 5
 Validation, 179
 source, 94
 Types, 102
 Data Central, 87, 88, 89, 90, 92, 94, 95, 96, 98, 99
 Project List, 87
 Data File Encoding, 59, 70
 Data Processing Examples, 184
 Data Processing Scripting, 102
 Data Transfer Job, 128, 168
 Decimal Delimiter, 63
 Default Template, 11
 Delete, 16
 Delete a Job, 164, 177
 Delete Data, 68
 Delete Variables from the Template, 37
 Delimited Text File, 55
 Details
 tab, 88
 Disable Population of Respondent Data, 69
 Duplicate
 a Rule, 42
 a Template, 15
 Duplicate Variables, 35

E

Email Address, 56, 58, 59, 60, 63, 65, 70
 Enabling the Feature in Confirmit, 116
 Encrypt
 File, 56
 Encrypt file, 58
 Encrypt File, 59, 60, 63, 65, 70
 Example of Transferring Data, 72
 Excel
 file, 46
 Excel version, 57
 Exclude
 Confirmit Tags, 182
 Open Ends, 56
 Exclude all open questions, 9
 Exclude Hierarchy/Table Lookup Labels, 8
 Execute a Rule, 42
 Executing Rules as Other User, 43

Execution Mode, 62, 67
 Export
 a Data Central Project, 91
 a Rule, 43
 a Template, 13
 Export language, 59
 Expression Editor Window, 100

F

File
 Transfer, 56, 61, 64, 65
 File Encoding, 56
 File transfer, 58
 File Transfer, 59, 70
 Files to include, 59, 70
 Fix by, 25
 Fixed Width
 File, 59
 Template, 3
 Flatten a Template, 38
 Flatten Template, 9
 Formatting, 56

G

General tab, 41, 79
 General Tab, 92
 Grant All, 72, 84
 Grids and 3D Grids, 109

H

Hide List Columns, 38
 Horizons Version, 122
 How to
 Add a Rule to the Rule Set, 81
 Add Variables to the Template, 29
 Assign new Range Values to a Variable, 35
 Back Up a Template, 29
 Change the Name of an Existing Job, 165
 Create a New Data Central Rule, 90
 Create a New Rule, 85
 Create a New Rule Set, 86
 Create a New Template, 6
 Delete a Job, 164, 177
 Delete Variables from the Template, 37
 Duplicate a Rule, 42
 Duplicate a Template, 15
 Duplicate Variables, 35
 Execute a Rule, 42
 Export a Data Central Project, 91
 Export a Rule, 43, 85
 Export a Template, 13
 Fix the Positions of Variables, 33
 Flatten a Template, 38
 Import a Data Central Project, 91
 Import a Rule, 43, 85
 Import a Template, 13
 Import Variables into the Template, 30
 Include Multiple Languages in a Template, 16

Link a Template to a Different Project, 15
 Modify an Existing Data Transfer Job, 162, 176
 Modify an Existing Job
 Field Mapping, 135, 155
 Move Variables within the Template, 36
 Navigate through Variables, 27
 Replace a Template, 14
 Schedule a Recurring Job, 176
 Set Up a New Data Transfer Job, 128, 168
 Confirmit Respondent to Salesforce, 147
 Confirmit to Salesforce, 138
 Show and Hide List Columns, 38
 Transfer Data from One Survey to Another, 72
 Update the Template from the Project, 39
 View Data Transfer Jobs, 174
 View the History of an Existing Job
 Confirmit to Salesforce, 159

I

Import
 a Rule, 85
 a Template, 13
 Variables into the Template, 30
 Import a Data Central Project, 91
 Importing data from single questions into a grid, 112
 Include
 Open Ends, 56
 Include Multiple Languages in a Template, 16
 Inherit from project, 16
 Installing the Package
 AppExchange Version, 116
 Horizons Version, 116
 interview_end, 109
 interview_start, 109
 interview_start and interview_end, 109
 Introduced Extensions, 183

J

Job List View, 124
 JScript .NET, 102

K

Key field, 62, 68

L

Length, 26, 34
 Link a Template to a Different Project, 15
 Locale, 56, 58
 Logging In to Salesforce, 126
 Loop Handling, 55, 58, 60, 63, 65

M

Managing CRM Connector Jobs, 159
 Map Fields, 62, 68
 Mapping Confirmit Variables, 40
 Mapping Fields, 70

Merge data, 62, 68
 Modify an Existing Data Transfer Job, 162, 176
 Move Variables within the Template, 36
 Multi Variable
 Change, 34
 Multiple Format, 9
 Multiple Languages in a Template, 16

N

Navigate through Variables, 27
 Net Framework, 102
 New Rule Permissions, 99
 New Template, 6
 Create, 6
 None, 16
 Not fixed, 26, 34

O

Open End
 Handling, 56
 Open Ends
 Only, 56
 Truncation, 56
 Open Ends Only, 56
 Open Text Numeric Variables, 106
 Open Text Variables, 105
 Other User
 Execute rule as, 43
 Override
 Filename, 57, 70
 Override Email Options, 57, 58, 59, 61, 64, 66, 70
 Override Filename, 58, 60, 61, 64, 66

P

Permission, 16
 Permissions
 Tab, 72, 83, 99
 Type, 84
 Pool, 38
 Position, 26, 34
 Position of Loop Variables, 56, 58, 60, 64, 65
 Post Scripts, 110
 Project
 'Details page, 88
 List, 87, 89
 Project ID, 62, 67

Q

Quantum, 60
 template, 4
 Questions and Answers, 115
 Quoted Values, 56

R

Read, 16
 Reallocating Variables, 37

Recode Multis, 9, 61
 Recoding
 data, 1
 Recurring Job
 Scheduling, 176
 Relative Date Filte, 52
 Report
 Tab, 82
 Respondent Data, 47, 61
 rule, 94, 95
 Rule Details, 92
 Rule List, 84
 Rule Management Tab, 80
 Rule Set List, 86

S

SAS, 60
 Save current options as default, 10
 Schedule a Recurring Job, 176
 Schema File Encoding, 59, 70
 Schema language, 8
 Script, 102, 105, 107, 108, 109, 110
 Script Examples, 111
 scripting, 102
 scripts, 102
 Selected
 Variables, 38
 Separate files, 55, 58, 60, 64, 65
 Set Up a New Data Transfer Job, 128, 138, 168
 Confirmit Respondent to Salesforce, 147
 Setting a Group of Variables to NULL, 113
 Show
 and Hide List Columns, 38
 Simple template, 3
 Single file, 56, 58, 60, 64, 65
 Source / Target variable usage, 68
 Source Tab, 44
 Source Type
 Confirmit Survey Database, 49
 Delimited Text File, 44
 Excel, 46
 Respondent Data, 47
 Triple-S Data, 53
 Split Multis in separate variables, 9
 Spread, 9
 Format, 181
 SPSS, 63
 SPSS (SAV), 65
 Survey
 source, 178
 target, 178
 Survey Data Template, 59, 70
 Survey Database, 49, 66

T

Target Tab, 55, 96, 98
 Target Type
 Confirmit Survey Database, 66
 Delimited Text File, 55
 Excel, 57

- Fixed Width File, 59
- Quantum, 60
- Respondent Data, 61
- SPSS, 63
- SPSS (SAV), 64
- Triple-S, 70
- Technical Details, 178
- Template
 - Backup, 29
 - Default, 9
 - Duplicate, 15
 - Flatten, 38
 - Multiple Languages, 16
 - Replace, 14
 - Update, 39
- Template Editor, 17
- Template List, 5, 14
- Template Permissions, 15
- Template type
 - Fixed Width, 3
 - Quantum, 4
 - Simple, 3
- Template Types, 3
- Templates, 1
- Text
 - in Answer Element Labels, 8
 - in question labels, 8
- Text Qualifier, 56
- The Procedures, 128, 138, 159
 - Flex Extension, 168
- Transferring Data
 - Salesforce to Confirmit Flex, 166
- Transferring Data Example, 72
- Transferring Data from Confirmit to Salesforce, 137

- Transferring Data from Salesforce to Confirmit, 127
- Triple-S, 1, 2, 53, 70
 - Version, 2
- Truncate Open Ends, 9, 58, 60, 63, 65
- Types of Variable, 19

U

- Update Data, 62, 68
- Update the Template from the Project, 39
- Use Test Database, 67
- Use Transaction, 69

V

- Validating an Action Script, 43
- Validating and Executing the Script, 110
- Validation Rules, 179
- Validation Setting, 69
- Validation Setting options, 42
- Variable Properties, 20
- Variable Types, 19
- Variables
 - Mapping, 40
 - Navigation, 27
- Versions of Triple-S, 2
- View Data Transfer Jobs, 174

W

- What is Triple-S?, 2
- Working with interview_start and interview_end, 109
- Write, 16