Confirmit Horizons v24

This is document revision 1 of the Confirmit Horizons v24 Flex User Guide, published in August 2018. The information herein describes Confirmit Horizons Flex and its features as of Build nr. 24.0.10 (given in the Authoring **Home > Help > About** menu). New features may be introduced into the product after this date. Go to www.confirmit.com or check "News" on the Customer Extranet for the latest updates.

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What's New in this Issue?

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 revision 1 of the Confirmit Horizons v24 Flex User Guide:

- The Confirmit version and build numbers are updated.
- The example code in the Adding a Respondent to the Opt Out List Using Scripting section is edited for clarification (see Adding a Respondent to the Opt Out List Using Scripting on page 10 for more information).

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

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

1. Introduction

Confirmit Horizons Flex is the product name given to Confirmit Horizons' inbuilt extensions functionality.

An extension is a computer program designed to be incorporated into and run by another "parent" application to provide additional functionality for the parent application - effectively a type of add-on. Extensions can be used to modify the behavior of existing features within Confirmit or add entirely new features.

Important
The Geolocation, Email Opt Out and SMS Surveys extensions are Add-Ons; commercial terms will apply.

For the Geolocation extension there is a fallback mechanism in place such that the IP checking will be skipped and the respondent will be allowed into the survey regardless of IP/location in the event the extension becomes unresponsive. For the Email Opt Out extension, the batch emailing task will abort without sending any emails if the extension becomes unresponsive.

The Geolocation extension will store some project level settings ("Anonymous Proxy Access" (Allow/Flag/Block), "Satellite Provider Access" (Allow/Flag/Block), "Violator Access" (Flag/Block), "Custom Block Page" text, Countries to be Blocked/Flagged, Last Timestamp and some aggregated statistics (Total Allowed/Flagged/Blocked for each respondent country)), as well as some respondent level data (IP Address, Country Code, Timestamp, Confirmit Project Id, Access (Allowed/Flagged/Blocked) and Confirmit Respondent Id), but no personally identifiable information.

The Geolocation extension includes reporting options in Google Earth or Google Maps that interoperate with Google services. Those parts of the Add-On depend on the continuing reasonable availability of the Google API and program.

The Email Opt Out extension will store the email address of blacklisted respondents, Company Id, and potentially Project Id or Panel Id (for survey or panel-level blacklists) and the unsubscribe confirmation text.

Confirmit refers to and runs an extension when it is called by one of several extension points. The change-over between Confirmit and the extension is seamless in both directions and the user or respondent will not know that the extension is running as an extension - it appears to be just another part of the Confirmit functionality.

Note: The extensions themselves are separate pieces of software which will be accessible from and listed in Confirmit where applicable.

In many cases the extension has an interface page such that you can set up the extension to function as required for your current survey. When such an interface is available for an extension and that extension has been selected for a survey, then an additional tab will be displayed in the **Survey Management > Overview** page for that survey. Click on this tab to open the interface page for the extension. Note that the setup you specify here will apply only to the current survey or panel; you can specify different setups for the same extension for any number of surveys.

The extension programs currently available within Confirmit Horizons Flex are created by Confirmit engineers. However the intention is to allow customers or third-party developers to create their own extensions as required - all the customer will require is the interface API from Confirmit. The extensions that are currently available include:

- **Email Opt Out** - allows the company, survey and/or panel administrator to add email addresses to black-lists such that particular respondents do not receive survey emails, and allows respondents to opt out of receiving emails for particular surveys, panels or companies (see Email Opt Out - Introduction on page 5 for more information).
- **Geolocation** - allows you to block or flag respondents suspected of providing fraudulent response data. Various methods and "degrees" of detection are available (see Geolocation - Introduction on page 13 for more information).
- **SMS Surveys -** enables respondents to receive and reply to surveys using the SMS functionality on their mobile telephones (see SMS Surveys - Introduction on page 22 for more information).
- **Confirmit Question Extensions -** extensions allow you to add several special types of questions to your survey. When the functionality is activated, an additional toolbox appears in the Questionnaire Tree providing access to the extensions you have licensed.

- **CRM Connect for Salesforce -** allows you to setup and manage data integrations with Confirmit Horizons and Salesforce through a simple graphical UI. The documentation for CRM Connect is available in the Data Processing User Guide.
- **Video Rating -** allows you to create and present video-rating questions to your respondents.

2. The Survey Management > Flex Extensions Menu

When you have opened a project, the **Survey Management** menu includes the **Extensions** sub-menu. Go to this sub-menu to open the Flex Extensions page. This page lists all the extensions that are available to your company. Here you can activate and deactivate the extensions you require for your project. Once an extension is activated here, additional tabs and properties will become available in your project.

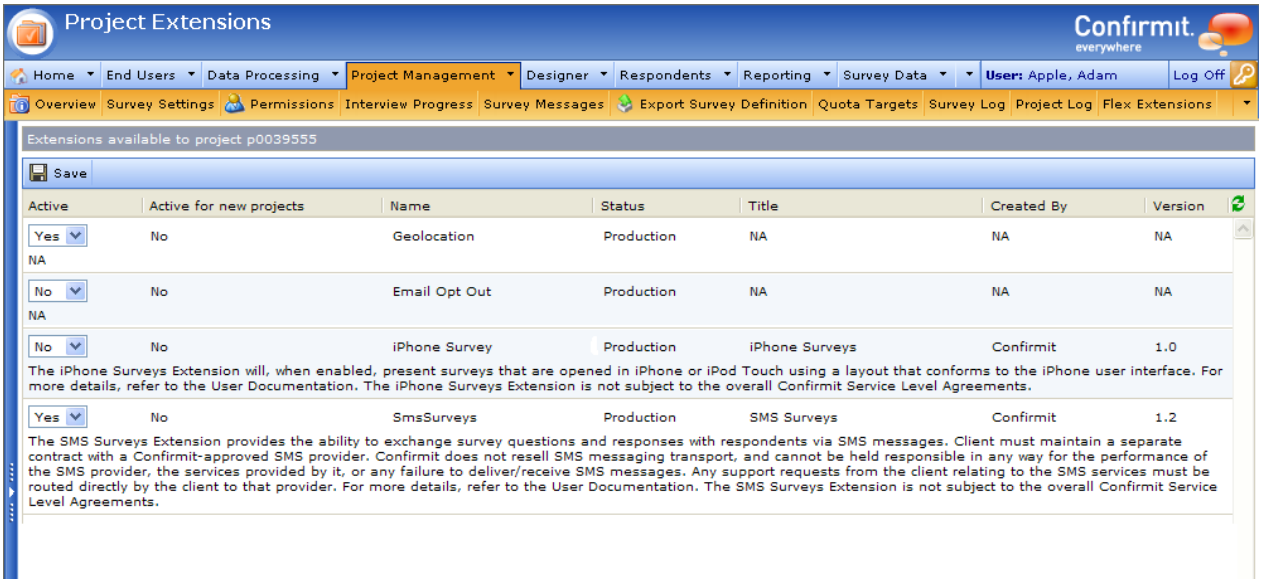


Figure 1 Example of the Project Extensions page with available extensions listed

The fields and columns are as follows:

- **Active** - indicates whether or not the extension is active for this project. Use this drop-down to activate and de-activate the extension for the project (see How to Activate and Deactivate an Extension on page 3 for more information).
- **Active for new projects** - indicates whether the extension will be active by default for all new projects created by users attached to this company. This is set in the **Admin > Accounts** menu - refer to the Administrator Manual for further details.
- **Name** - the name of the extension.
- **Status** - the current status for this extension.
- **Title** - the title of the extension.
- **Created By** - the name of the company to which the person who created the extension is registered.
- **Version** - the version number for the extension.
- **Description** - a short description of the extension is provided below the other information.

Note that the Title, Created By, Version and Description are extracted from the extension's Information XML file (refer to the Administrator Manual for further details). If the creator of the extension has not added this information to the XML file, then NA will be displayed in the Project Extensions page.

2.1. How to Activate and Deactivate an Extension

To activate an Extension for a survey:

1. Open the survey and go to the **Survey Management > Flex Extensions** menu command.

   The Flex Extensions page opens, listing all the extensions that are available to you.

2. Find the extension you wish to activate for the current survey or panel.
3. Open the drop-down list in the Active column for the required extension, and select **Yes**.
4. Click **Save** to save the changes.

To deactivate an extension for a survey:

1. Open the survey and go to the **Survey Management > Flex Extensions** menu command.

   The Flex Extensions page opens, listing all the extensions that are available to you.

2. Find the extension you wish to deactivate for the current survey (all extensions that are active for the survey have **Yes** selected in the Active column).
3. Open the drop-down list in the Active column for the required extension, and select **No**.
4. Click **Save** to save the changes.

3. Email Opt Out - Introduction

Important
The Email Opt Out extension is an Add-On. Commercial terms will apply.

The Email Opt Out extension allows the company, survey and/or panel administrator to add respondent email addresses to "blacklists" such that particular respondents do not receive project emails. The extension also allows the survey/panel administrators to include "Opt out" links in emails to respondents, thereby allowing respondents to opt out of receiving emails for particular surveys, panels or companies.

The blacklisted email addresses are stored in a database. When an emailing task is initiated, Confirmit sends the email address list to the extension and the extension then filters the addresses against the blacklist database. Any email addresses that appear in a blacklist will be blocked and the email will not be sent to that address.

A list of the addresses that have opted out can be exported.

If for example the user has added a list of 100 email addresses to a survey, and five of those addresses appear in the survey black-list, then only 95 emails will be sent. The number of emails sent, and the fact that five emails have been blocked due to the addresses being on a black-list, will be displayed on the **Survey Management > Interview Progress** tab - refer to the Authoring User Guide for further details.

Note: There is a limit to the total number of email addresses that the blacklist database can contain for a company. The limit is defined in the AUP.

3.1. The Blacklist Interface

When the Email Opt Out extension is activated, the Email Opt Out tab appears in the Survey Overview page.

If the Overview page is for a Survey, then the tab contains a Company Blacklist and a Survey Blacklist, with filtering on email address or domain for both as shown below. If the Overview page is for a panel, then the tab contains the Company Blacklist and a Panel Blacklist. All the lists function in the same way.

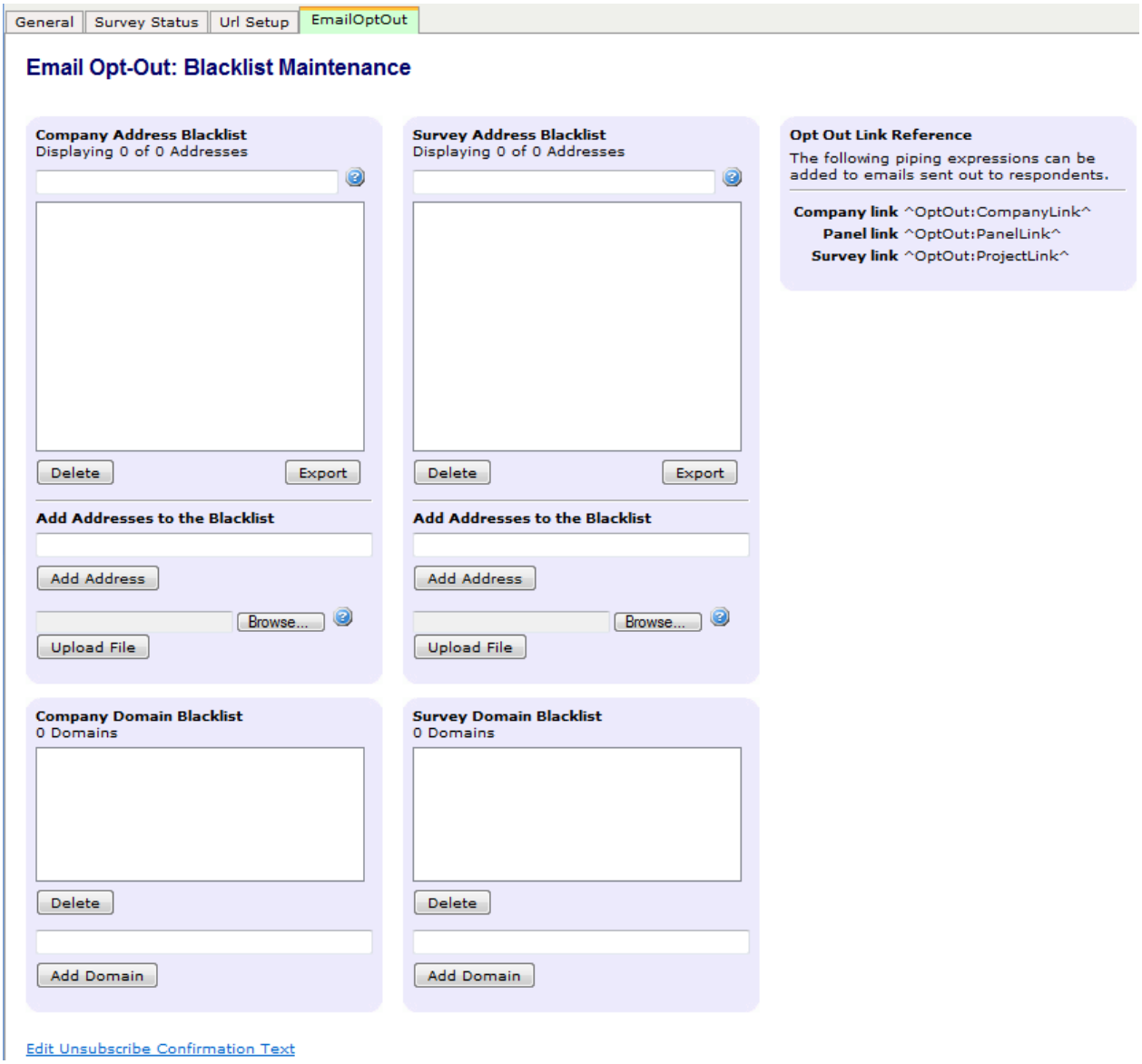


Figure 2 The Email Opt Out tab

The survey or panel administrator can view, search, add, upload and delete email addresses and domains from the Survey and/or Panel Blacklist. Only a user with Company Administrator permission can add, upload and delete email addresses or domains from the Company Blacklist. However anyone who can access the survey or panel can view and search either blacklist.

Note: There is a limit to the total number of email addresses and domains that the blacklist database can contain for a company. The limit is defined in the AUP.

The latest action in a blacklist is noted below the list.

A maximum of 100 addresses/domains will be listed in the Blacklists. To filter the lists, add search criteria to the Search fields above the lists. Note that a minimum of three characters are required in the search field to run a search.

You can export the address list to an .xml file, which can then be opened in Excel (see Exporting Address Lists on page 7 for more information).

Click the **Edit Unsubscribe Confirmation Text** link to go to the Unsubscribe Confirmation page (see The Unsubscribe Confirmation Page on page 9 for more information).

3.2. Adding Addresses

To add an address or domain to a blacklist:

- Type the address/domain into the Add Address field / Add Domain field for the appropriate list and click **Add Address/Domain**.

If you have a standard text file of addresses that you wish to add to a blacklist:

1. Click **Browse**.

   A standard file selection window opens.

2. Find and select the file, then click **Open** to add the file path and name to the upload field.
3. Click **Upload** to upload the list of addresses into the blacklist.

Note: The file of addresses must be a standard text file with one address on each line.

3.3. Exporting Address Lists

To export an address list:

1. In the Blacklist Maintenance pane, click the **Export** button for the list you wish to export.

   A File Download dialog opens.

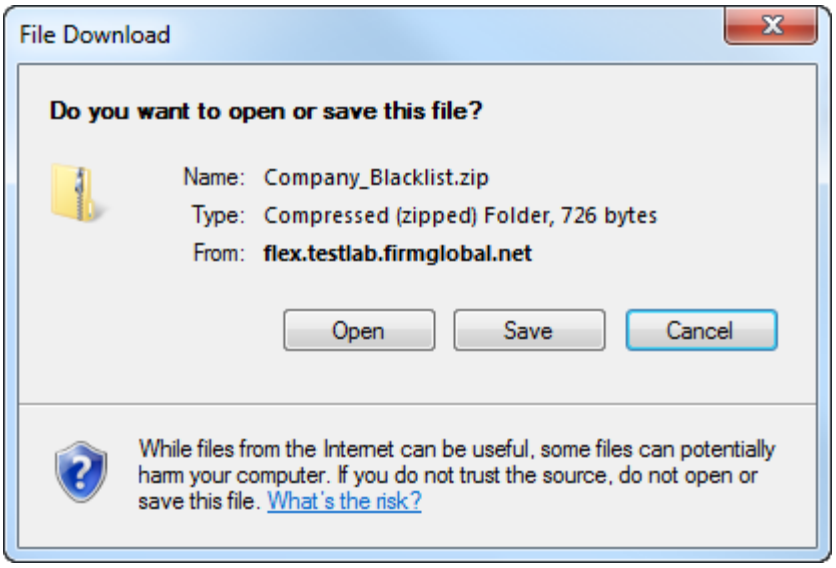


Figure 3 The File Download dialog

2. To save the file, click **Save**.

   A standard Windows Save As dialog opens.

3. Browse to the folder in which you wish to save the file, and if you wish to change the filename from the default, type the desired file name into the field.
4. Click **Save**.

   A zipped .xml file is saved at the specified place. This file can be un-zipped, and opened in Microsoft Excel.

3.4. Opt-Out Links

The survey or panel administrator can add links to the emails that are sent to the respondents/panelists to allow them to opt out of the emails. Three types of opt-out links can be added, depending whether you are working with a survey or a panel:

- **Company link -** can be added to emails for any survey. The respondent/panelist clicks this link to opt out of receiving any further emails from this company.
- **Panel link -** for panels. The panelist clicks this link to opt out of receiving any further emails concerning this panel.
- **Project link -** for standard surveys. The respondent clicks this link to opt out of receiving any further emails concerning this survey.

When writing the emails, add the required script(s) as shown below to the body of the email.

```
Company Link: ^OptOut:CompanyLink^
Panel Link: ^OptOut:PanelLink^
Project Link: ^OptOut:ProjectLink^
```

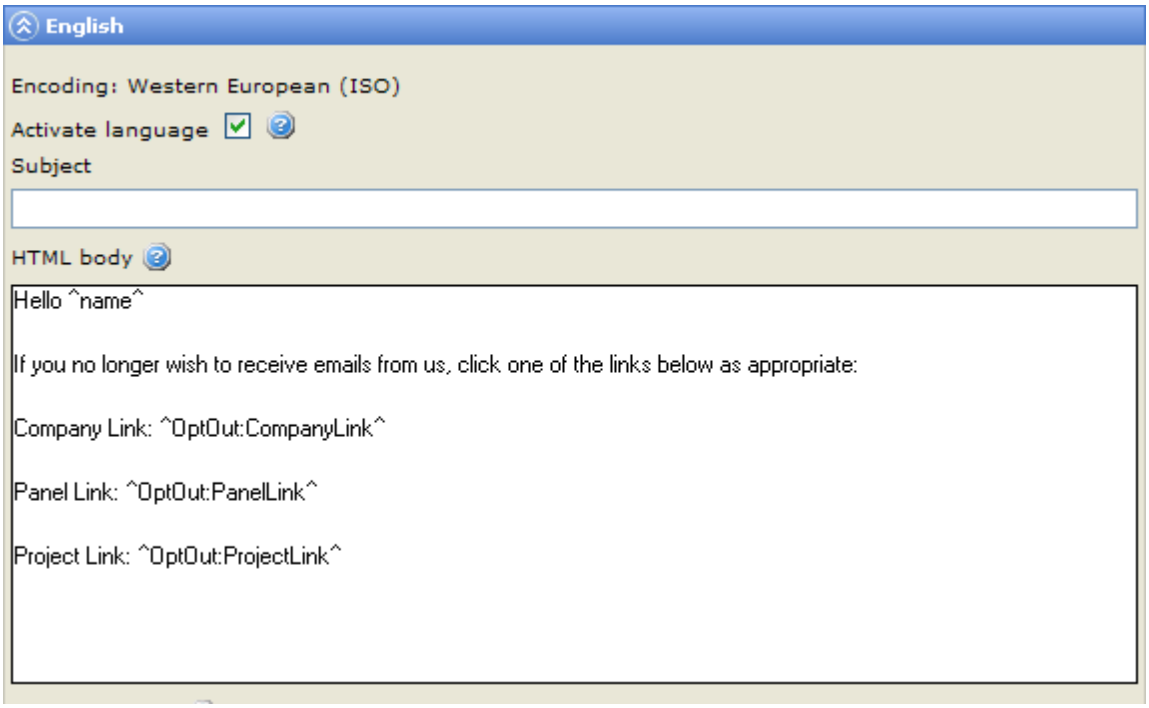


Figure 4 Example of the opt-out links being used in an email

All emails will now carry the appropriate link(s). The respondent can click on a link to go to a "confirmation page" to confirm that they wish to opt out. When they click **OK** on this Confirmation page, their email address will automatically be added to the appropriate blacklist and the Opt-out item on the Interview Progress tab (under **Survey Management**) will be incremented. The administrator can then edit the survey email address list and manually remove the respondent from the list.

In the event a panelist is opting out of a panel, a flag will be set in the panel database that can be used by the panel administrator to exclude those panelists from future samples. The variable is called "Unsubscribed", and the date is also logged in a variable called "UnsubscribedDate". Any 'in-progress' samples/reminder emails will be stopped immediately by the extension, so the unsubscription will come into effect from the moment it is confirmed, without any changes to the sampling process. Note that the panel opt-out functionality is only supported in Community Panels.

Note: If the survey administrator does not edit the address list, then the opt-out respondent can still be selected to receive email. As the email will be blocked before it is sent, the survey will be affected as fewer emails will then be sent than were originally required.

3.5. The Unsubscribe Confirmation Page

When a respondent or panelist clicks one of the opt out links, a confirmation page opens. This page helps to prevent mistakes as the respondent/panelist must then click **Ok** to confirm the opt out before the action is processed. The survey/panel administrator can edit the texts in the confirmation page to ensure the texts suit the current survey or panel.

Note: The same texts will be used for all surveys and panels in the company that use Email Opt Out, until they are changed; It is not currently possible to set up different texts for different users, surveys or panels.

1. At the bottom of the Blacklist Maintenance page, click the **Edit Unsubscribe Confirmation Text** link.

   The Unsubscribe Confirmation page opens.

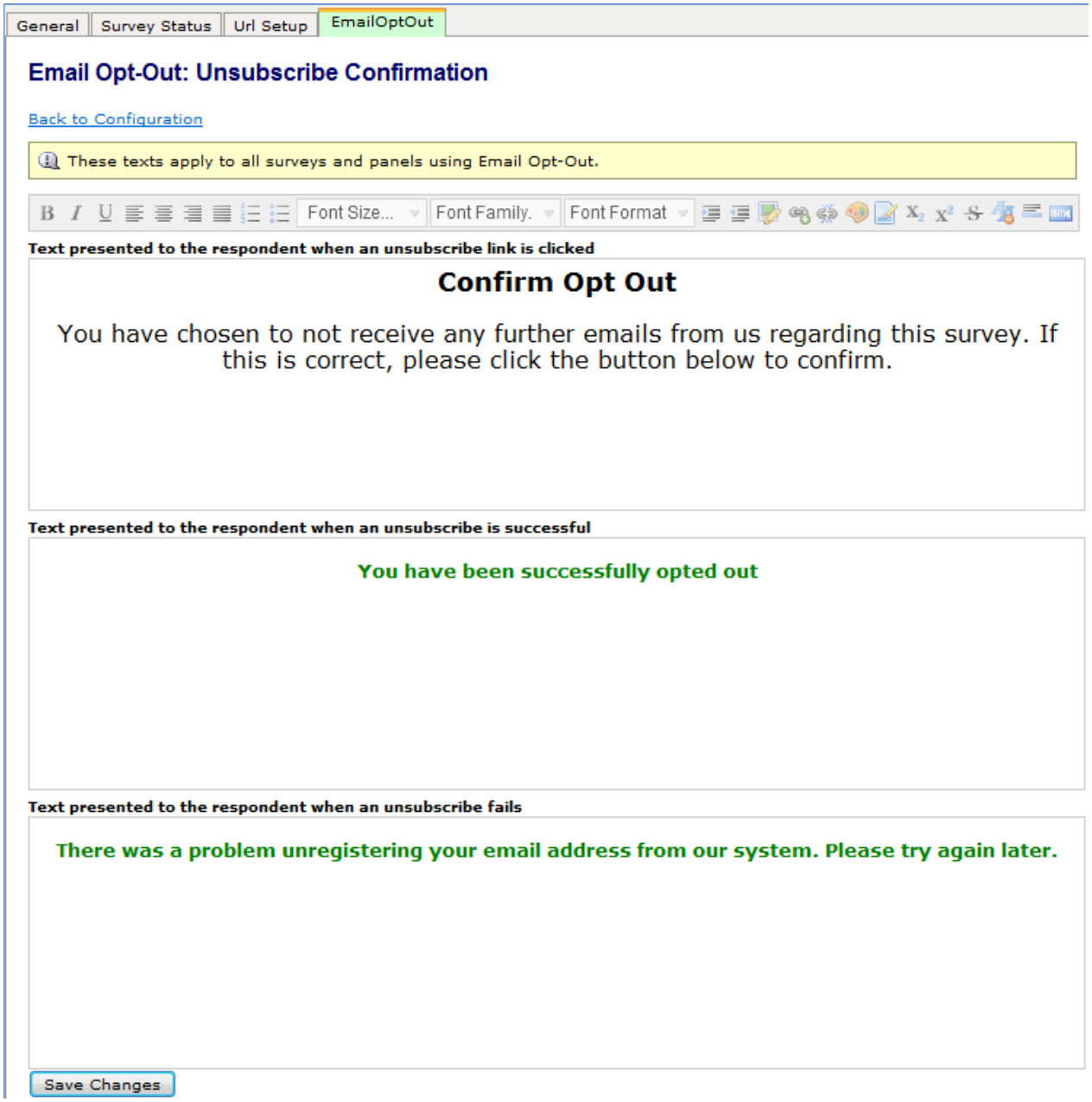


Figure 5 Example of the Confirm texts that will be displayed to a respondent/panelist when he/she clicks an opt out link

2. Edit the text as required.
3. On completion, click **Save Changes**.

To return to the Blacklist Maintenance page, click the **Back to Configuration** link.

3.6. Adding a Respondent to the Opt Out List Using Scripting

When a respondent is within any survey where the E-mail Opt Out extension is enabled, you can allow the respondent to opt out from receiving further emails. This is accomplished through scripting, and it allows you to let the respondent unsubscribe from the current survey, the company fielding the current survey, or the panel the respondent has been sampled from.

```
var ext = Extension("Email Opt-Out");
var result = ext.GetRequest("Blacklist", p);
```

where **p** is a Hashtable with **optOutType** (the type of opt out: PROJECT, COMPANY or PANEL).

Below is an example of a function opting the respondent out of further emails from the current survey. The function uses the GetRequest method and the Request parameters described above:

```
Example call from survey script:
function BlacklistEmailAddress()
{
 var ext = Extension("Email Opt-Out");
 if(ext.IsValid)
 {
 var p = new Hashtable();
 p["optOutType"] = "PROJECT";

 var result = ext.GetRequest("Blacklist", p);

 if(result.IsValid)
 {
 return "Status: " + result["Status"] + "; Message: " +
result["Message"];
 }
 return "Result is invalid";
 }
 return "Extension script name is invalid";
}

//For this script to be executed add a function call into the survey:
//BlacklistEmailAddress();
```

The email address for the current respondent is the email address added to the opt out list. This email address is obtained from the respondent data “email” field. When using a “PANEL” optOutType, if a respondent data email field does not exist then the email field will be obtained from the panel.

The capability to opt out respondents in surveys can be very useful, for example to allow panelists to opt out from within the panel portal. To do this you can include an "opt out survey" in the portal. The survey could be made available when a panelist is logged in to the panel.

3.7. Additional Information for the Respondents Edit Page

Two columns are available for the **Respondents > Edit** page that can provide additional opt out information to the project/panel administrator. These two columns are:

- **OptOut -** shows a numerical value that indicates when the respondent opted out relative to the current emailing batch task. The numerical values and their definitions are listed in the table below.
- **OptOutDate -** a date field showing the date on which the respondent opted out, or if the respondent opted out after the email was sent, the date of emailing.

Value	Description
1	The respondent existed in the company blacklist at the time the emailing batch task was initiated.
2	The respondent existed in the panel blacklist at the time the emailing batch task was initiated.
3	The respondent existed in the survey blacklist at the time the emailing batch task was initiated.
4	The respondent chose to opt out of all surveys for the company after receiving the survey invitation.
5	The respondent chose to opt out of all surveys for the panel after receiving the survey invitation.
6	The respondent chose to opt out of all surveys for the project after receiving the survey invitation.
7	The respondent's email domain existed in the Blacklisted Company Domain list when the emailing batch task was initiated.
8	The respondent's email domain existed in the Blacklisted Panel Domain list when the emailing batch task was initiated.
9	The respondent's email domain existed in the Blacklisted Project Domain list when the emailing

batch task was initiated.

For further information on the **Respondents > Edit** page, refer to the Authoring User Guide.

4. Geolocation - Introduction

Important
By using this add-on you accept and agree that certain non personally identifiable information will be stored (refer to the Documentation), and that certain reporting functionality available with this Add-On interoperates with Google services and therefore depends on the continuing reasonable availability of the Google API and program for use with the Service.

Detecting fraudulent responses to a survey, and preventing those responses from being included with the response data, are vitally important to maintaining the integrity and reliability of the survey results and thereby any decisions based on those results.

The Geolocation extension allows you to define a set of parameters that will help to identify possibly fraudulent responses, such as the geographical location of the respondent or whether or not a respondent is using an anonymous proxy or a satellite provider. You can then for example flag those responses such that they can be identified in the database, allowing you to investigate them further, or you can block them immediately, thereby preventing the data from those respondents being added to the database.

The Geolocation API defines a high-level interface to location information associated only with the device hosting the implementation, such as latitude and longitude. The API itself does not differentiate between available underlying location information sources. Common sources of location information include Global Positioning System (GPS) and location inferred from network signals such as IP address, RFID, WiFi and Bluetooth MAC addresses, and GSM/CDMA cell IDs, as well as user input. No guarantee is given that the API returns the device's actual location.

Each browser uses its own internal geolocation service, and usually uses information from 3G, Wifi and IP address. If the device has hardware GPS then it will attempt to ascertain coordinates using GPS.

Note: The location coordinates may take some seconds to ascertain. If the respondent moves on to the next question before the coordinates are returned, no positional information will be saved.

The Geolocation extension creates and maintains its own database for each survey that uses the extension. This database stores survey configuration information, for example which countries are to be blocked, flagged or allowed, the Block Page for the survey (see The Block Page Editor on page 20 for more information), and the respondent statistics for each configured survey. No information is currently stored by the extension in the Confirmit databases. For a blocked respondent, their country of origin as determined by the geolocation database, the project ID of the survey that they tried to access, and a time-stamp, are stored.

If a prospective respondent is blocked by the Geolocation functionality when they attempt to access the survey, then they will be presented with a message telling them the survey is closed to them. You can set up the message that is to be displayed using the Block Page Editor (see The Block Page Editor on page 20 for more information). If the respondent is flagged for any reason then they will be able to reply to the survey and there will be no indication to the respondent that they have been flagged.

Geolocation will be most useful for reducing fraud in open surveys. However it may also be used in closed surveys where for example market research companies have bought respondent samples from providers who may not have verified the locations of their panelists.

4.1. The Geolocation Interface

The Geolocation Interface is as shown below:

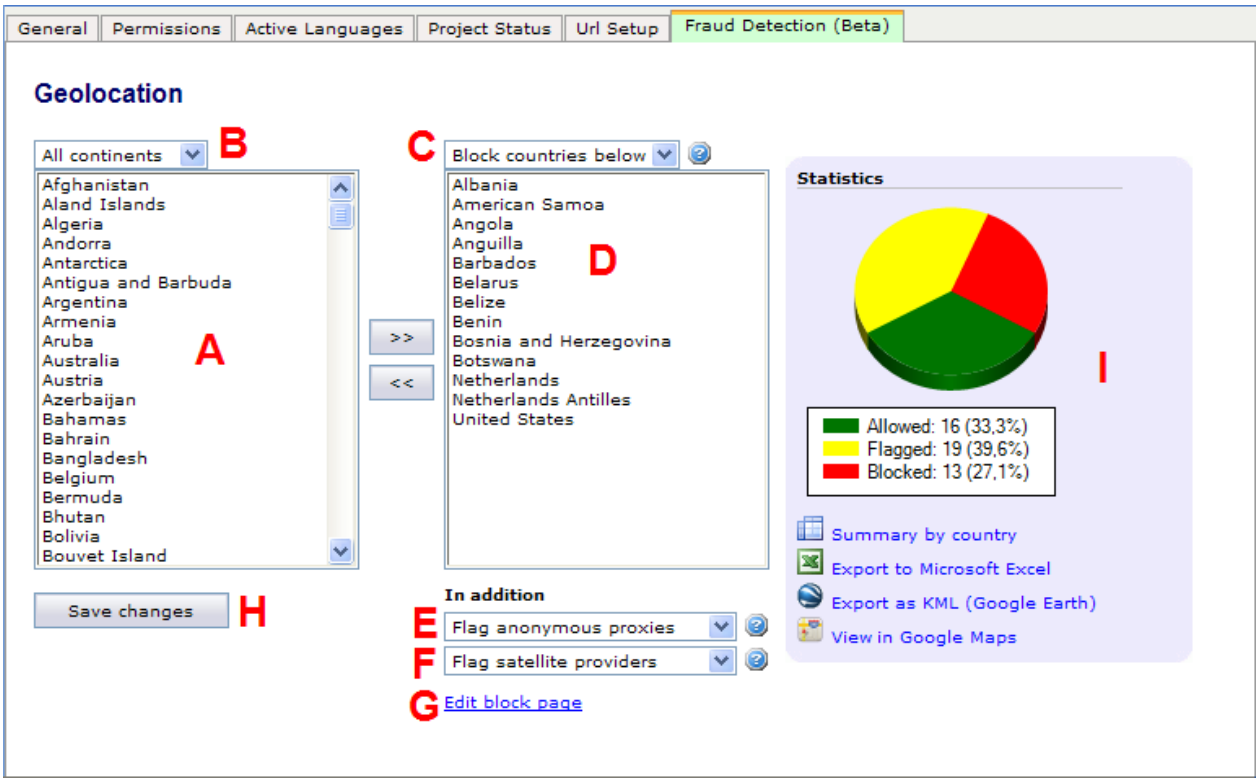


Figure 6 The Geolocation page layout

The areas in the page are as follows:

- **A** - list of countries. Respondents from any country in this list are allowed to access the survey. Note that specific respondents can be flagged or blocked by the Anonymous Proxies and/or Satellite Providers settings.
- **B** - this drop-down filters the Countries list by Continent. A typical scenario would be where all the countries in a particular continent are to be blocked or flagged. This then provides an easy way to list all such countries and move them to the Selected list on the right.
- **C** - this drop-down refers to the Selected list below the field. This allows the user to either flag or block respondents from the countries in the Selected list.
- **D** - list of countries that are to be flagged or blocked.
- **E** - allow, flag or block respondents connecting through Anonymous Proxies. An anonymous proxy is a server that acts as a go-between for requests from clients seeking resources from other servers - for example respondents seeking to respond to a survey. An IP address belonging to an anonymous proxy service, such as Anonymizer, may be employed to mask a user's real geographical location. Note that some respondents may have a good reason for using an anonymous proxy, however the use of one will normally be cause for concern.
- **F** - allow, flag or block respondents connecting through Satellite Providers. It is often difficult to ascertain through their IP address the country of origin of an end user who is using a satellite provider.
- **G**- link to the "Block Page Editor". This editor allows you to customize the page that will be displayed to respondents who have been blocked by C, E or F above (see The Block Page Editor on page 20 for more information).
- **H** - saves any changes you may have made to the configuration. Note that the configuration will apply only to the current survey.
- **I** - the Statistics panel. This displays the current counts of Allowed, Flagged and Blocked respondents.

- **Summary by country** - a list of the statistics, summarized by country, is available (see The Summary By Country Page on page 15 for more information).
- **Export to Microsoft Excel** - the statistics can be exported to an Excel file (see Export to MS Excel on page 16 for more information).
- **Export as KML** - if you have the Google Earth application installed on your pc, you can view the statistics as an overlay on the world map (see Export as KML (Google Earth) on page 16 for more information).
- **View in Google Maps** - click to open Google Maps with the statistics displayed as an overlay (see View in Google Maps on page 17 for more information).

To add a country to the Selected list, double-click on it in the Countries list, or single-click on it then click the **>>** button to move it. To remove a country from the Selected list, double-click on it in the list, or single-click on it then click the **<<** button to move it back to the Countries list.

4.1.1. The Summary By Country Page

This page lists the countries from which responses (or attempts to respond) have been received, and presents the numbers or responses and percentages of the total received from each country.

Back to configuration

Search:

Origin	Allowed	%	Flagged	%	Blocked	%	Total	%
Unknown IP	0	0.00	19	39.58	0	0.00	19	39.58
United States	4	8.33	0	0.00	10	20.83	14	29.17
United Kingdom	8	16.67	0	0.00	1	2.08	9	18.75
Belgium	1	2.08	0	0.00	1	2.08	2	4.17
Canada	1	2.08	0	0.00	0	0.00	1	2.08
Germany	1	2.08	0	0.00	0	0.00	1	2.08
India	1	2.08	0	0.00	0	0.00	1	2.08
Netherlands	0	0.00	0	0.00	1	2.08	1	2.08
Totals	**16**	**33.33%**	**19**	**39.58%**	**13**	**27.08%**	**48**	**100.00%**

Showing 1 to 8 of 8 entries

Figure 7 Example of the Summary By Country page

The fields and columns on this page are as follows:

- **Origin** - the country from which the respondent has replied (or attempted to reply) to the survey.
- **Allowed** - the total number (and percentage) of respondents from that country who were allowed access to the survey. At the time the respondent accessed the survey, the country was selected as one of the countries to be allowed.
- **Flagged** - the total number (and percentage) of respondents from that country who were allowed access to the survey and flagged. At the time the respondent accessed the survey, the country was selected as one of the countries to be flagged.
- **Blocked** - the total number (and percentage) of respondents from that country who were denied access to the survey. At the time the respondent accessed the survey, the country was selected as one of the countries to be blocked.
- **Total** - the total number (and percentage) of respondents from each country.
- **Search** - a text search tool to filter the countries displayed.

Note: In the table illustration above, the United States has respondents in both the Allowed and Blocked columns. This indicates that the status for that country was changed after some respondents had accessed or attempted to access the survey.

Click **Back to configuration** to return to the Geolocation main page.

4.1.2. Export to MS Excel

Click this link to export the statistics as an MS Excel file.

	A	B	C	D	E	F	G
1	**Country**	**Allowed (not flagged)**	**Flagged (not blocked)**	**Blocked**	**Total**	**Last response date**	
2	Unknown IP	0	19	0	19	08.06.2009 12:31	
3	Belgium	1	0	1	2	04.06.2009 09:27	
4	United States	4	0	10	14	08.06.2009 10:38	
5	Canada	1	0	0	1	04.06.2009 10:27	
6	Germany	1	0	0	1	04.06.2009 10:29	
7	India	1	0	0	1	04.06.2009 10:30	
8	Netherlands	0	0	1	1	04.06.2009 10:31	
9	United Kingdom	8	0	1	9	05.06.2009 11:44	
10							
11							
12							

Figure 8 Example of the statistics exported as an MS Excel file

4.1.3. Export as KML (Google Earth)

If you have the Google Earth application installed on your pc, you can click the **Export as KML (Google Earth)** link to view the statistics overlaid onto the map.

Note: KML is a file format used to display geographic data in an earth browser, such as Google Earth, Google Maps, and Google Maps for mobile. A KML file is processed in much the same way that HTML (and XML) files are processed by web browsers. Like HTML, KML has a tag-based structure with names and attributes used for specific display purposes. Thus, Google Earth and Maps act as browsers for KML files.

The Geolocation extension exports the statistics as a KML file and adds colored markers to the map, enabling you to quickly identify the countries from which the various allowed, flagged and blocked responses to your survey originated. Click on a colored marker to open a statistics label for that country, giving you the complete details.

If you do not have Google Earth installed then a message will be displayed asking you to specify the application that is to be used to open the file.

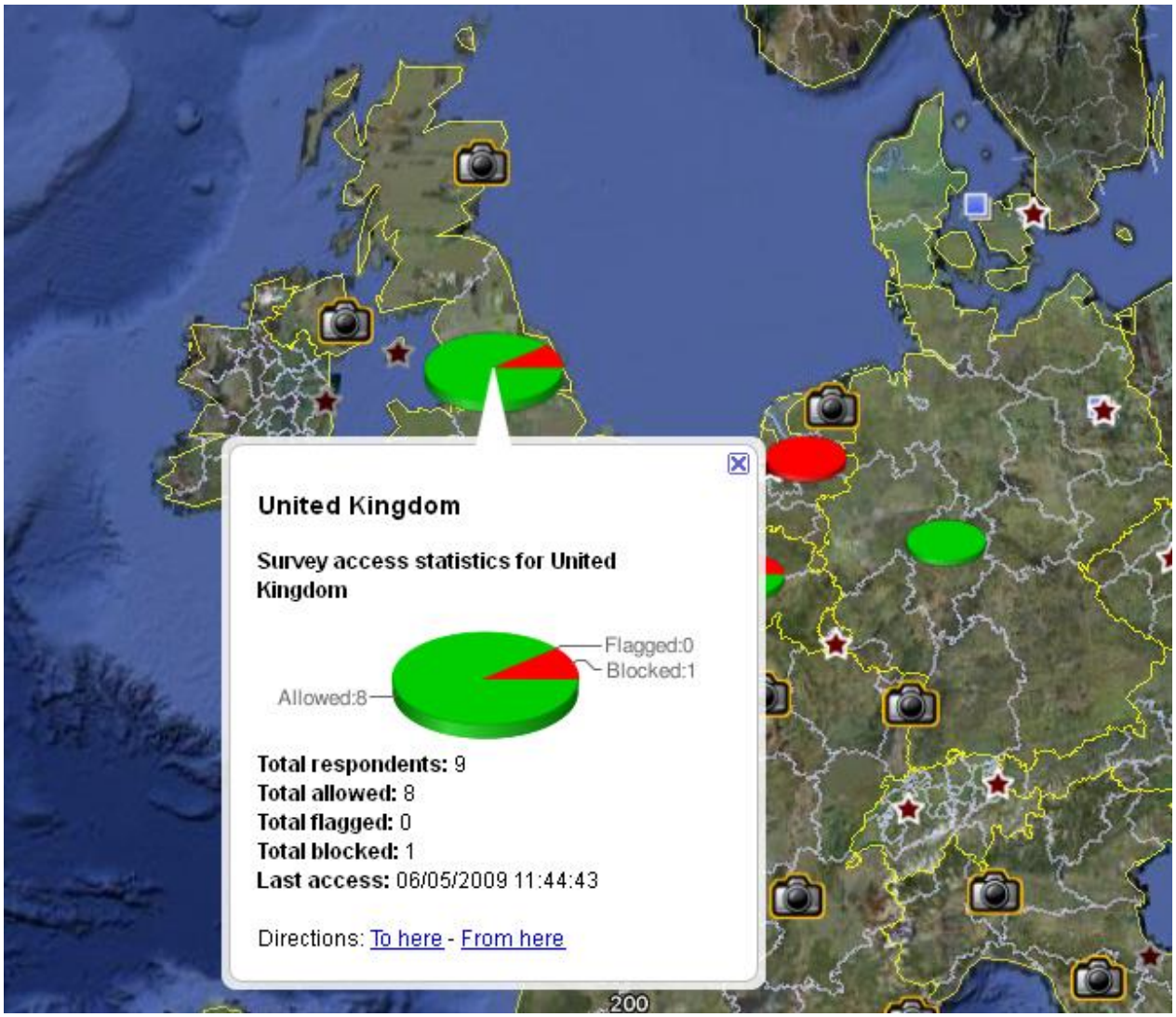


Figure 9 Example of the Export as KML (Google Earth) display

4.1.4. View in Google Maps

Click this link to open a new Internet Explorer window with Google Maps, with the statistics presented as an overlay on the map. The data for each country from which respondents have replied (or attempted to reply) to the survey, is displayed as a small pie chart. The chart sections are colored red, yellow and green to indicate the proportions of respondents who are blocked, flagged and allowed respectively.

Note that Google Maps is a freely-available web application that requires no installation.

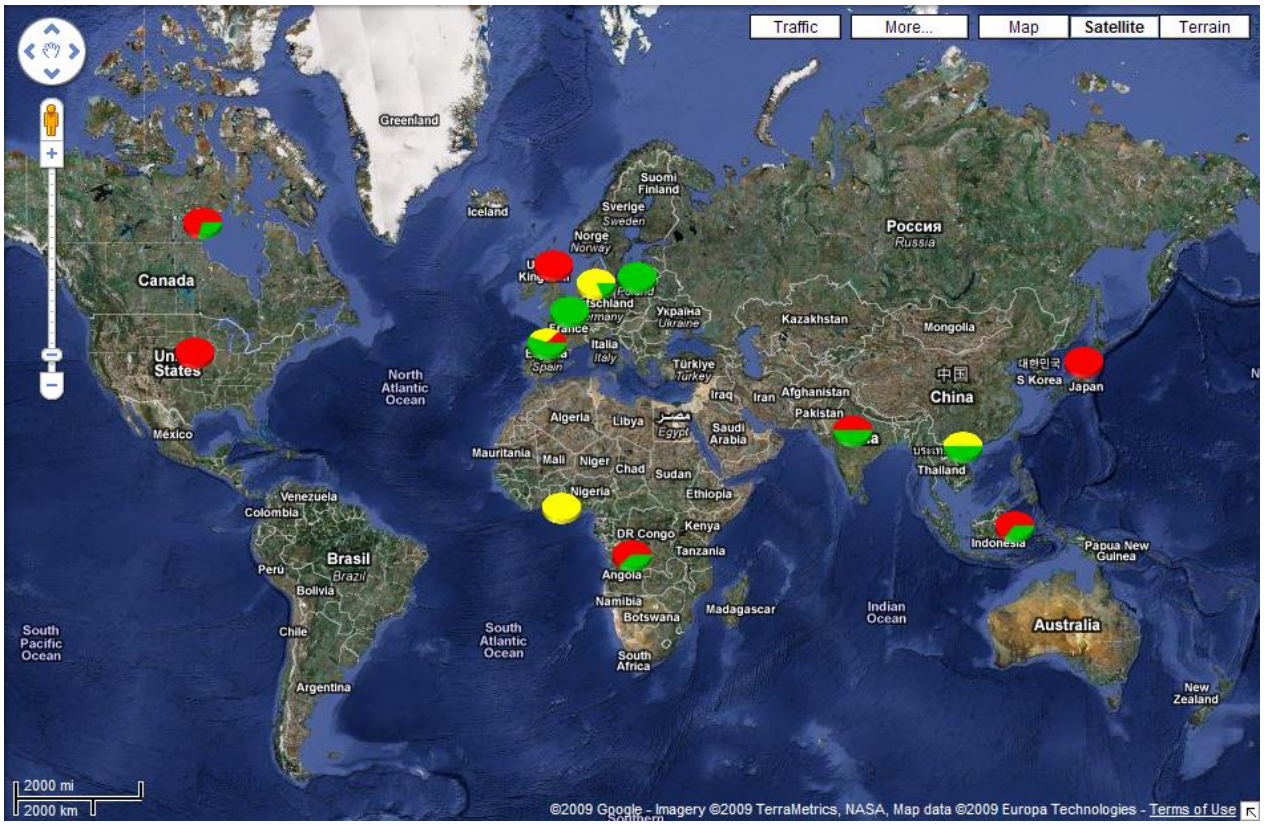


Figure 10 Example of the Google Maps overlay

Click on a pie chart in the map to open a detailed statistics box for that country.

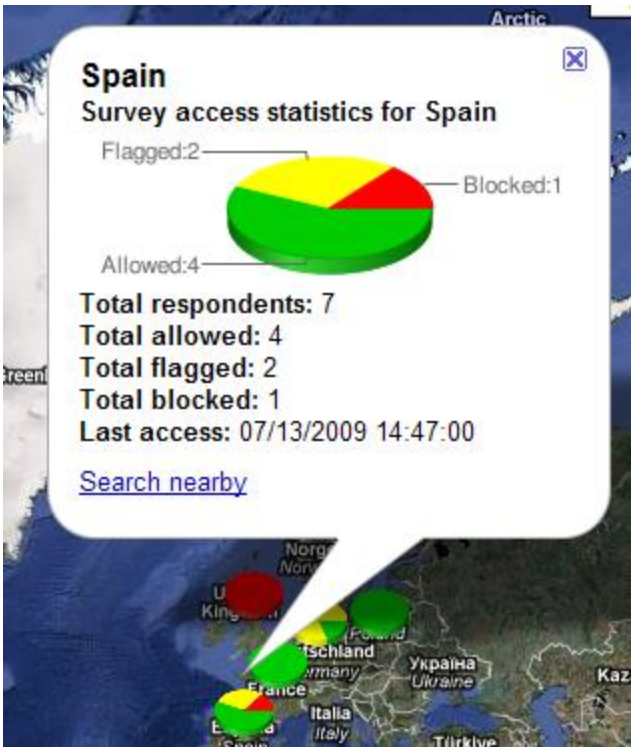


Figure 11 Example of the detailed statistics box for a country

The statistics information is also listed in the Contents column to the left of the map, as shown in the example below.

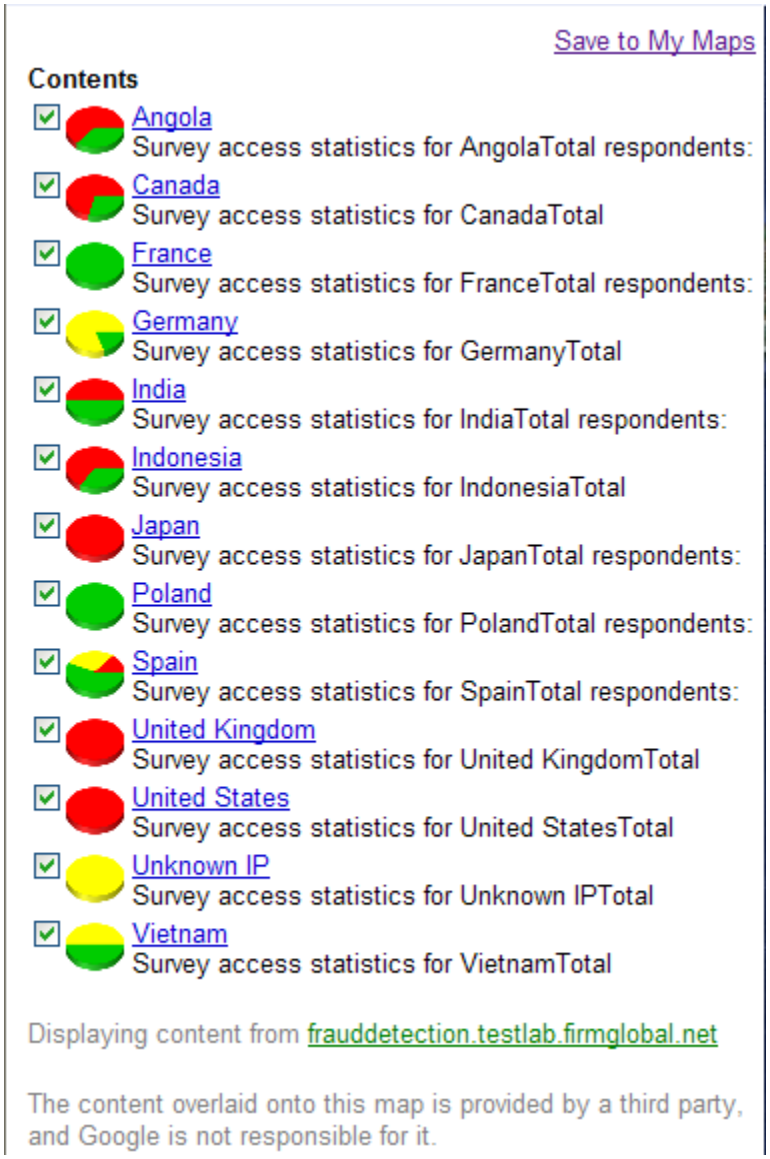


Figure 12 Example of the statistics information as presented by Google Maps

All the available data is displayed on the map by default. In the Contents column you can deselect specific countries by clicking in the checkboxes, and the pie charts for those countries will then be removed from the map. Click in the boxes again to redisplay the pie charts. Click on a country's link to open the detailed statistics box for that country.

4.1.5. The Block Page Editor

The Block Page is the page that is displayed to people who attempt to respond to the survey from a location, proxy or provider that is blocked (see The Geolocation Interface on page 13 for more information). This editor allows you to set up the page to present the message you wish to give.

Figure 13 Example of the Block Page Editor

The Edit page areas are:

- **A** - toolbar, containing the editing and formatting tools you will need to edit the text page. These tools have the same functions as the corresponding tools in MS Word.
- **B** - the editing area. This area by default contains some text and a world map image. You can edit the text and delete the image or replaced it as required using the tools in the toolbar above.

When the page is to your liking, click **Save changes** to save the page, then click **Back to configuration** to return to the Geolocation Interface page.

4.1.6. Extracting Geolocation Data

If you wish to use details from the Geolocation lookup in the survey, you can call to the Geolocation Extension from a script node in the survey and retrieve Country Code, Country Name and Status.

Assuming the survey has variables CountryCode, CountryName and GeolocationStatus, the following script can be inserted at the beginning of the survey to store the results from the Geolocation lookup:

```
var ext = Extension("Geolocation");
var result = ext.GetRequest("Respondent");
f("CountryCode").set(result["CountryCode"]);
f("CountryName").set(result["CountryName"]);
f("GeolocationStatus").set(result["Status"]);
```

The statuses returned are “Allowed” or “Flagged”. “Blocked” will never be returned because the respondent is then sent to the blocking page and will never enter the survey.

A list of the country codes is available on http://www.maxmind.com/app/iso3166.

5. SMS Surveys - Introduction

Important
The SMS Surveys extension is an Add-On. Commercial terms will apply.

The SMS Survey extension is built by Confirmit. The extension enables respondents to receive and reply to surveys using the SMS functionality on their mobile telephones.

Note: The client company is responsible for acquiring the required SMS services, and must contract separately with a Confirmit-approved SMS provider. Confirmit does not resell SMS messaging, and is not responsible in any way for the SMS provider, the services provided by it, or any failures in its performance. Any support requests from the client relating to the SMS services must be routed directly by the client to that ESP.

Note: The cell plans sold by some mobile operators, by default, will block messages they interpret as being spam, social networking and/or "inappropriate material". In this case, to receive messages that would otherwise be blocked, the respondent must change his/her account settings to disable the message-blocking functionality.

Points to note:

- The extension currently supports all question types except Hierarchy and searchable multi.
- "Other - please specify" answer options are not supported.
- All questions are displayed as text only.
- Grid, 3D-Grid, Open Text List and Numeric List questions are divided into separate Single/Multi/Numeric/Open Text questions.
- A chart is always shown as a simple table/list.
- The total size of a question, including text and answer alternatives, should be kept below 160 characters to avoid splitting the text message into multiple messages. Some SMS providers do not support long messages.
- Long text messages from respondents (> 160 characters, for example as an answer to an open-text question) are only supported by some SMS providers. Infobip concatenates large messages where possible, but it depends on the local mobile operator network capability. In the event a respondent sends a long message and it is not supported by the provider, the message may be truncated.
- Open surveys and limited surveys with and without password are supported (see Limited Surveys on page 32 for more information).
- When uploading respondents to the survey, use the mobile phone number including country code for the UserID.

Note: Remember that respondents will normally be charged for each SMS message they send, and depending on the respondent's mobile service provider, may also be charged for each SMS message they receive. In addition, these charges can increase considerably if the respondent is currently outside the country in which their mobile phone is registered. To reduce the chance of dissatisfied respondents, you should bear this cost in mind when designing your questionnaire and keep the number of questions to a minimum.

5.1. How a Respondent Accesses an SMS Survey

A respondent has two methods of accessing an SMS survey:

1. By sending keyword (and a password if required) to a number

   A respondent accesses an SMS-survey by sending the keyword (and a password if required) by SMS from his/her mobile phone to one of the numbers registered to the company sending out the survey. The keyword must be the first word in the message.

For example: Assume you have created a survey to investigate car preferences amongst a sample of the population. You could specify the keyword for the survey to be CAR, and you could then send an SMS message to your prospective respondents containing the text "Send CAR to 4721502500 to participate in a survey on car preferences". If the respondent wanted to participate in the survey, he/she would send the word CAR to the specified number and this would start the survey. The respondent would then receive the first question in the survey as an SMS message. The respondent would provide the appropriate answer(s) and send this as a reply to the message. He/she would then be sent the next question in the survey, and so on.

2. By replying to a received SMS

   Invitations to participate can also be sent via email (see Sending SMS Invitations via Email on page 33 for more information).

   When a respondent starts an SMS survey, a session is created linked to the respondent's mobile number and the number used by the survey. This session is kept alive for 12 hours. Any SMS messages that the respondent sends to the number used by the survey during this period are treated as answers to this ongoing survey. After the 12-hour period has expired, any SMS messages sent will be treated as an attempt to start a new survey.

Note: For limited surveys, the UserID is the telephone number of the mobile telephone the respondent uses to send the replies to the survey. The UserID is part of the "proof of identity", and the respondent must therefore send the keyword (and password if required) from the mobile number registered to them. The respondent cannot for example borrow a friend's mobile and send the keyword and password from it.

5.2. The Question Types

Some types of questions that can be used in a survey must be simplified to make them suitable for the SMS environment. The question types available are listed below, along with descriptions of any "simplifications" that are performed on them, and examples of how they will look to the respondent.

- **Single** - displayed "as is". For example, a "Gender" question could be sent as:

  ```
  Gender
  1 Male
  2 Female
  ```

  The respondent must reply with the code of the desired answer alternative, for example **1** for Male.

- **Multi** - displayed "as is", with a hint on how to answer the question. For example, a "Car" question could be sent as:

  ```
  Cars tested
  1 Ford
  2 VW
  3 Volvo
  4 Toyota
  Answer all that apply, on the same line. e.g. 1,2,3.
  ```

  The respondent must reply with the codes of the desired answer alternatives, separated by a comma or semicolon when several are sent. For example **1,3,4**.

- **Grid** - sent as a series of single questions. For each question, the respondent must reply with the code of the desired answer alternative.

- **Open text** - displayed "as is". The respondent must reply with his/her desired response.

- **Numeric** - displayed "as is". The respondent must reply with his/her desired (numerical) response.

- **Date** - displayed "as is" with a hint on the date format. For example, a date-of-birth question could be sent as:

  ```
  What is your date of birth?
  (yyyy-mm-dd)
  ```

  The respondent must answer with a date in the correct format, for example 2010-12-31.

- **Ranking** - displayed "as is", with a hint on how to answer the question. For example, a "car ranking" question could be sent as:

```
Rank these cars in order of preference:
1 Ford
2 VW
3 Volvo
4 Toyota
5 BMW
List the ranking on the same line. e.g. 2,1,3
```

The respondent must reply with the codes of the desired answer alternatives in the order of preference, separated by a comma or semicolon. For example **5,1,3,2,4**.

- **Open text list** - displayed as a series of open text questions. In each case the respondent must reply with his/her desired response.
- **Numeric list** - displayed as a series of numeric questions. In each case the respondent must reply with his/her desired (numerical) response.
- **3D-Grid** - sent as a series of single, open text and/or numeric questions, depending on the types of questions used in the 3D-Grid. For each question, the respondent must reply as described above.
- **Info** - displayed "as is".
- **Chart** - displayed as a table, for example:

```
Car 22% (|10)
Train 49% (22)
Bus 11% (5)
Walk 36% (16)
Bicycle 29% (13)
Total 45
```

For some question types, a hint is added automatically to the message text to guide the respondent on how to reply. Hints are defined in the following languages (refer to Appendix B: Confirmit Language Codes in the separate Professional Authoring User Guide for further details):

Ar
Cs
Da
De
En
Es
Et
Fi
Fr
He
It
ja
Ko
Nl
No
Pl
Pt
Ru
Sv
Th
Zh-CHS

Zh-CHT

5.3. Types of SMS Surveys, and How to Set them Up

There are two main types of SMS survey; one way, and two way.

One Way SMS survey

When an SMS is sent to respondent but it does not need any reply back from them, this is classified as a One Way SMS survey. For example, you can send a reminder to the respondent to take part in the survey which was sent to them a few days previously. Another example would be that you can send the link to the survey in the SMS, and ask them to take part in the survey.

How to do it with Confirmit:

- An SMS is sent as an email from Confirmit to the SMS gateway.
- The SMS contains a short URL link to the web survey.
- The respondent clicks on the short URL to view the survey on his/her mobile browser.

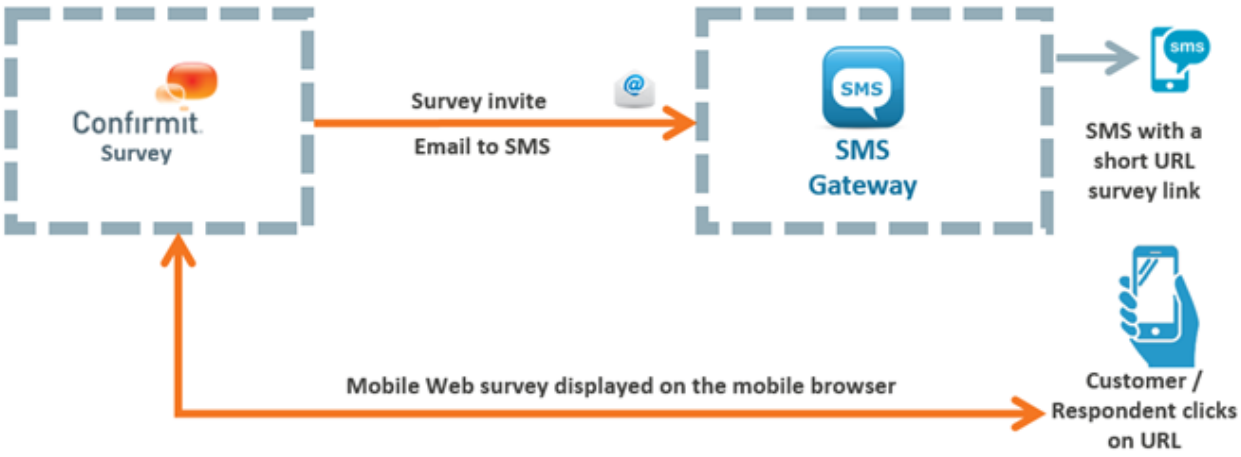


Figure 14 The One Way SMS survey

Note that with one way SMS you do not need the Flex extension set up. This is because as the respondent cannot reply to the sms, no data is captured from respondent via the sms.

How to set up a One Way SMS Survey

1. Create the survey and in the Invitation and reminder emails folder insert an email object.
2. Open the email object, then tick the **Send as plain text** box and untick the **Send as HTML box**.
3. The "From" and "Reply to" email addresses must be those that have been registered with the SMS provider.
4. The Subject of the email can be alphanumeric (check with the SMS gateway provider for any limitations). Then when the respondent receives the SMS, they will see the Subject as the sender id. For example, if the subject of the email is set as Confirmit, the respondent will receive the SMS from Confirmit.

   There may be limitations on the number of characters allowed for the subject; you should always check with your SMS provider.
5. The "Plain text body" should contain the SMS text that will be displayed to the respondent.

Note: One SMS unit can have a maximum of 160 characters. If your SMS text is over this limit, the message may be split or not delivered fully. Check with your SMS provider for limitations.

6. Upload to each respondent's email field the appropriate address format for the SMS provider.

   Always check your SMS provider's email format. For example, for SMS provider Infobip, the format must be **mobilenumber@emailtosms.infobip.com**, and for TextAnywhere the format must be **mobilenumber@sms160id.textapp.net** where **mobilenumber** is the mobile number of the respondent without a leading zero but with the appropriate country code, e.g. 441234567890.

7. On completion, use respondent emailing to send out the emails; they will be delivered to the respondents as SMS.

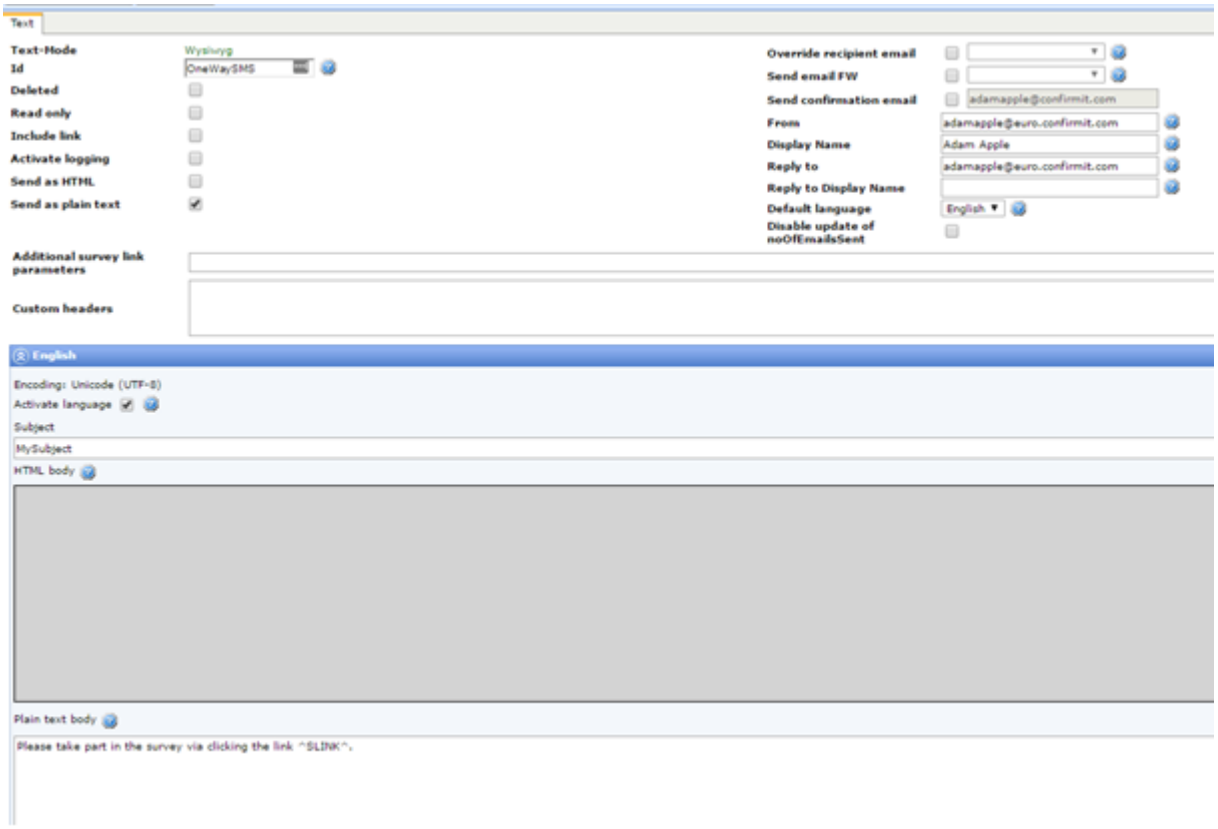


Figure 15 The settings required for One Way SMS

Two Way SMS survey

Two way SMS is used when the respondent must reply to the SMS at least once to take part in the survey. A typical example would be that you send the first question to the respondent as an SMS, and when respondent replies back, further questions are then sent to them via SMS.

How to do it with Confirmit:

- An SMS is sent as an email from Confirmit to the SMS gateway.
- SMS reply is sent to the SMS gateway that forwards it to the Confirmit survey via SMS Flex extension.

Figure 16 The Two Way SMS survey

Note that allowing respondents to reply with STOP, QUIT or any other commands still qualifies as Two Way SMS.

How to set up a Two Way SMS Survey

1. Create the survey.

   Remember that sending numerous text messages can be expensive for the respondent - keep the questions to a minimum.

   Each question with its answer alternatives must be shorter than 160 characters to avoid the question being split into several SMS messages. Not all SMS providers support automatic splitting of long SMS messages.
2. Go to the **Survey Management > Flex Extensions** menu command and activate the SMS Surveys extension for the survey.
3. Go to the **Survey Management > Overview** menu command and open the Survey Overview page for the survey.
4. Open the SMS Surveys tab (see The SMS Surveys Tab on page 27 for more information).
5. Type the keyword for the survey into the Keyword field.
6. Select the Valid to date for the keyword.
7. Check the appropriate Survey Settings boxes to include the desired elements in the SMS messages to the respondents.
8. Click **Save** to save the settings.
9. If you wish to have a limited survey, upload/create the respondent list as necessary (see Limited Surveys on page 32 for more information).
10. If you wish to send the invitations via email, create the email (see Sending SMS Invitations via Email on page 33 for more information).
11. Test the setup - send an invitation message to yourself and ensure the survey functions as planned).

5.3.1. The SMS Surveys Tab

When the SMS Survey extension is activated for your company, the SMS Surveys tab becomes available in the Survey Overview page (go to **Survey Management > Overview**). Here you set up the SMS properties for the survey. The options available to you will depend on the permission level you have.

5.3.1.1. SMS Provider Details

This section lists the SMS providers that are currently supported by Confirmit, and specifies the important details of each provider. Note that new providers may have been added to the supported list since this document was published. If in doubt, contact Confirmit for the latest details.

Note: If you wish to use a different SMS provider than those currently supported, please contact Confirmit for an evaluation of whether the service is suited for integration. Confirmit reserves the right to terminate support for any SMS provider at our discretion.

SMS Providers	Concatenated SMS	SMTP to SMS	Shared Short Code	Dedicated Short Code	Dedicated Long Code	Web site
Alcatel-Lucent AES				X	X	www.alcatel-lucent.com
Clickatell	X	X		X	X	www.clickatell.com
Esendex		X		X	X	www.esendex.co.uk
Infobip		X	X	X	X	www.infobip.com
Intelecom		X	X	X	X	www.intele.com
Isometric Solutions					X	www.isometricsolutions.com
PSWinCom		X		X	X	www.pswin.com
SMS Teknik	X	X			X	www.smsteknik.se
SMS Trend					X	www.smstrend.net
TextAnywhere		X		X	X	www.textanywhere.net
ViaNett		X	X	X	X	sms.vianett.com
Vibes				X		www.vibes.com
Wire2Air		X	X	X		www.wire2air.com

Note: The (AES) is an API platform that mobile operators can use to expose SMS services to external applications. Confirmit's implementation leverages the AES REST interface to send and receive SMS.

The table columns:

Concatenated SMS:

- MT (Mobile Terminated) messages: The SMS provider supports splitting long (>160 characters) messages into multiple messages when sent from Confirmit to the mobile phone.
- MO (Mobile Originated) messages: The SMS provider supports long messages sent from the mobile phone to Confirmit. The message is split up by the SMS gateway and reassembled by Confirmit.

SMTP to SMS:

- If the SMS provider supports "SMTP to SMS", then e-mail invitations in Confirmit can be used to send SMS invitations.

Shared Short Code:

- Use a pre-provisioned short code at a fraction of the cost of setting up a dedicated short code. When you use a shared short code, the keyword you wish to use with your survey must be registered both in the SMS extension in Confirmit and in your SMS provider account.

Dedicated Short Code:

- Use a dedicated short code for branding and recognition purposes. Keywords only have to be registered in the SMS extension in Confirmit.

Dedicated long code:

- A dedicated international long number that can be used to access the survey from several countries. Keywords only have to be registered in the SMS extension in Confirmit.

Web site - the web site of the SMS provider.

Countries supported

To our best knowledge, the table below shows the countries where the various SMS providers offer local numbers. Note that this information may not be 100% accurate or up to date. Contact the providers directly to confirm which services they offer in the various countries.

SMS Providers	Countries supported
Alcatel-Lucent	See note above.
Clicatell	Clickatell offers two-way messaging in UK, Australia, Denmark, Sweden, Germany (http://www.clickatell.com/products/two_way.php) and short code in South Africa, Namibia, USA, Canada, UK and Australia (http://www.clickatell.com/products/shortcode.php).
Esendex	Australia, France, Germany, Ireland, Spain, UK, USA.
Infobip	Broad selection of countries, check the website.
Intelecom	Norway, Sweden, Denmark, Germany.
Isometric Solutions	<Hardware based>.
PSWinCom	Norway, UK.
SMS Teknik	Denmark, Finland, Norway, Sweden.
SMSTrend	Australia, Austria, Belgium, Czech Republic, Denmark, Deutschland, France, Ireland, Italia, Netherlands, New Zealand, Poland, Portugal, Spain, Switzerland, Turkey, UK, USA.
TextAnywhere	UK.
Vianett	Denmark, Finland, Norway, Sweden (http://sms.vianett.com/prices).
Vibes	USA.
Wire2Air	USA.

5.3.1.2. SMS Provider Configuration

Users that are assigned the "Company Administrator" permission will be able to configure the details for the SMS provider they have chosen to contract with. Company Administrators will see the configuration settings in the upper-right part of the page. Note that the details and options displayed will depend on the SMS Provider selected.

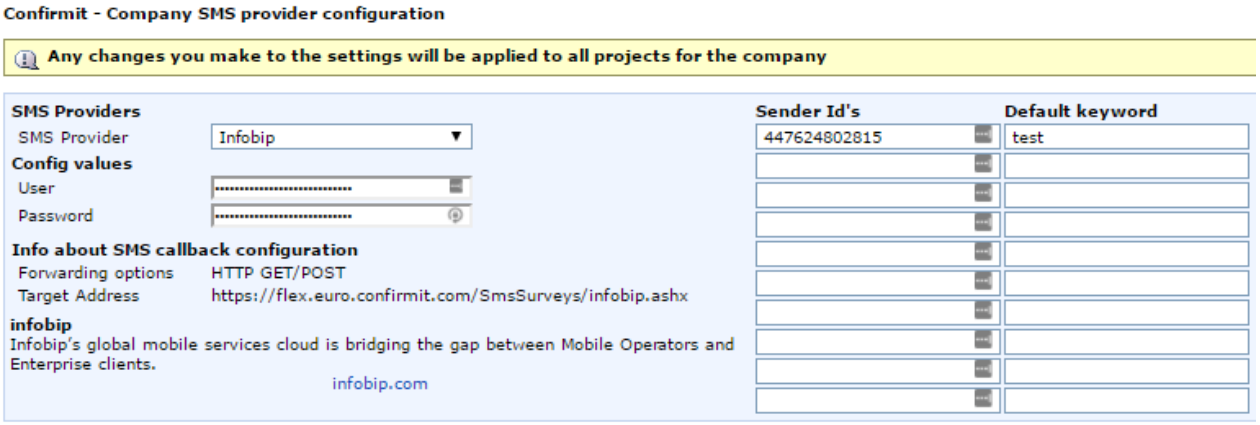


Figure 17 The Company SMS Provider Configuration settings

The settings are as follows:

Important
Any changes you make to the Company SMS Provider Configuration settings will be applied to all surveys for the company.

- **SMS Provider -** the company providing the SMS service for your company. You may have several service providers registered. When a provider is selected, its details are presented towards the bottom of the provider configuration area.
- **Config values -** to prevent unauthorized use of the SMS system, the SMS provider will require "proof of identity" from the user setting up the survey; for example a user name and password. Additional details such as server host name, the API ID etc. may also be required, depending on the SMS provider, and will be supplied when your company registers with the provider.
- **Sender Ids -** the numbers to which the respondent sends the replies. These numbers will be provided by the SMS service provider.
- **Default keyword –** you can associate a default keyword with a SenderId so that users can start a survey without using a keyword. The user would then typically start the survey by sending the answer to the first question. This is a company-wide setting. Note that this will only work for dedicated numbers (SenderId's). A new conversation with a keyword missing will check if there is a default keyword associated with the SenderId. If so the keyword will be added to the message.

  Usage scenario - If you send the first question text as part of an SMS invitation, the user can reply with only the answer to the first question; they do not need to send the keyword. For example, if the SMS invitation is "Please rate the support call you just had. Answer this message by sending a number (1 – 5). ". Then the user can reply by just sending the desired number.
- **Event log -** a list of information that builds up in the bottom area the page. All events concerning the survey are logged here, with the time and date, the server on which the survey is being run, the project Id and a description of the event. Note that a normal user will see only the events concerning the survey he/she is working on, while an Administrator will see the events for all the surveys administered by the company.

5.3.1.3. SMS Settings

When the SMS Surveys extension is configured with one or more providers, the following settings for the extension can be set on the project level by a project administrator:

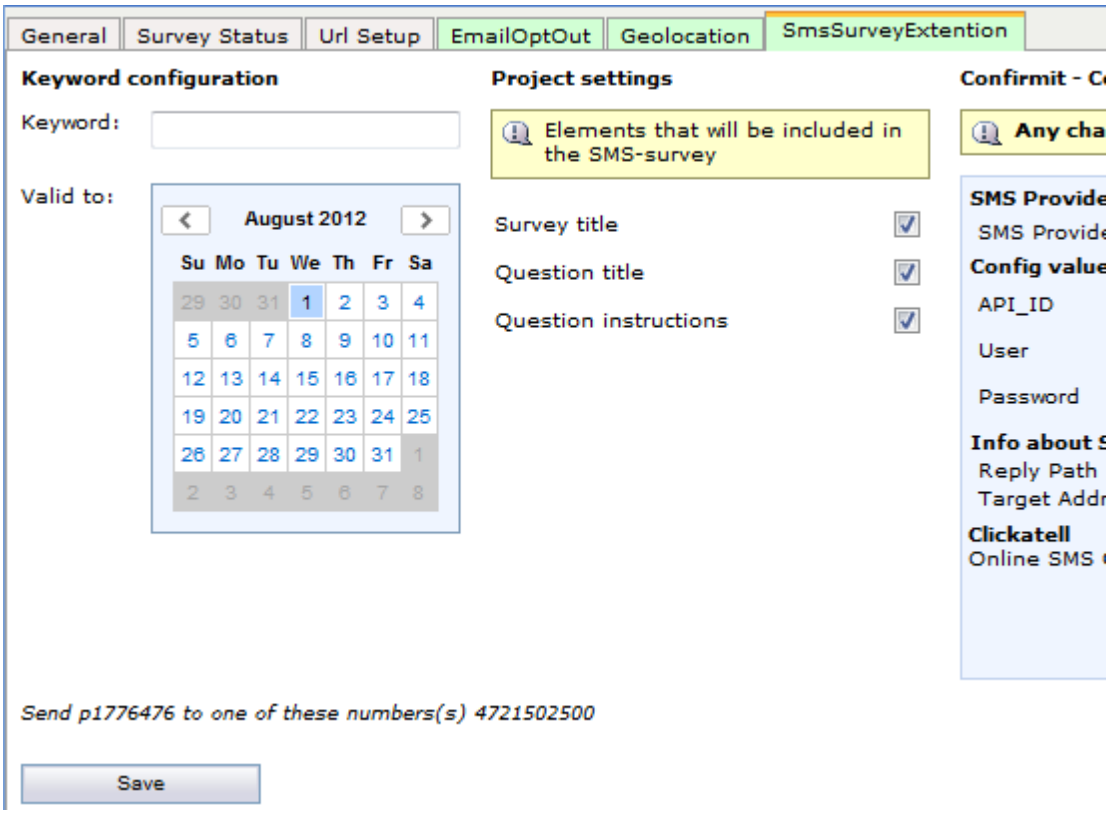


Figure 18 The options available to a project administrator

The options and properties are as follows:

- **Keyword -** this is the word you wish to be used as the project Id in the SMS-readable format. The keyword must be unique for the company, and must be given a "Valid to" date on which it will expire. After the valid-to date, the word can then be used again for a different project. Note that keywords are not case-sensitive.
- **Valid to -** set the date you wish the keyword to expire. The keyword will then expire at 23:59:59 on the specified date. Note that the project or company administrator can go in and change the expiry date at any time.
- **Start Survey Info -** below the Valid To calendar is an information text describing how to start the survey. It will list all the numbers (SenderIds) that can be used to access the survey.
- **Project settings -** these specify what is to be included in the SMS message to the respondent. If all remain unchecked, then only the question text and answer options will be displayed in the SMS message.
  - **Survey title -** check the box to include the title of the survey at the beginning of the first message that is sent to the respondent.
  - **Question title -** check the box to include the question title for each question.
  - **Question instructions -** check the box to include the question instruction for each question.
- **Event log -** a list of information will build up towards the bottom of the page. All events concerning the project are logged here, with the time and date, the server on which the project is being run, the project Id and a description of the event. Note that a normal user (project administrator) will see only the events concerning the project he/she is working on, while a Company Administrator will see the events for all the projects administered by the company.

5.3.2. Open Surveys

For open surveys (check the option on the project's Survey Settings > Web Options tab), you just need to distribute the SMS number and keyword (for example through receipts or posters). Anyone sending an SMS message to the number with the correct keyword will receive a reply containing the first question from the survey, and will be able to respond to the survey by replying to the messages.

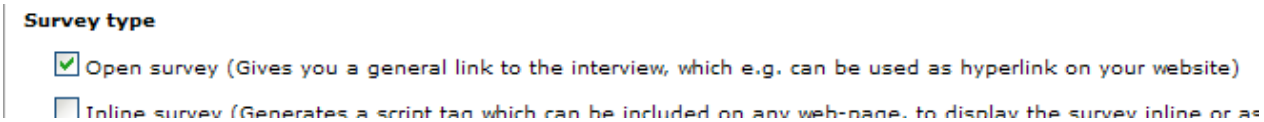


Figure 19 Setting the survey Open

5.3.3. Limited Surveys

SMS surveys can also be limited to "invited" respondents only. If you wish to make a survey limited, then you must upload a respondent list to the survey. You then have two options:

1. The survey can be accessed using the UserID only, i.e. from the mobile telephone registered to the respondent. In this case the respondent would start the survey by sending just the keyword, for example "CAR", from his/her mobile telephone to a number registered as a Sender ID (see The SMS Surveys Tab on page 27 for more information).

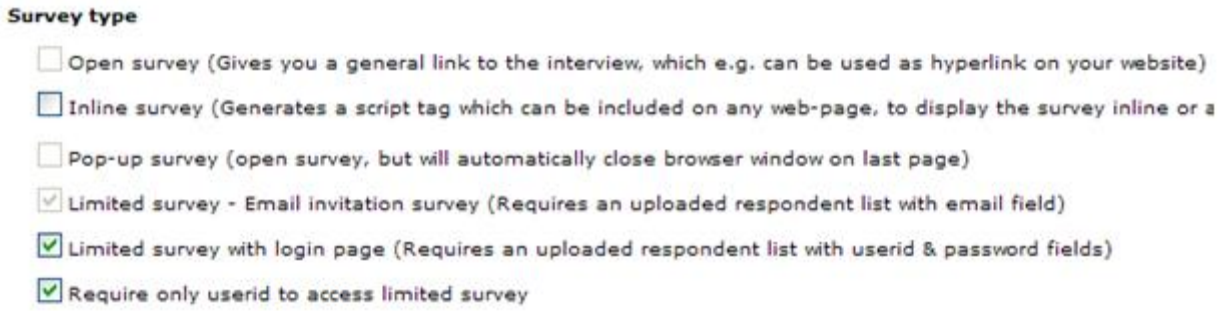


Figure 20 Setting access via UserID only

The uploaded respondent list would need to include the respondent's UserID (the mobile telephone number registered to that respondent, including the country code), for example:

UserID
4412345678
4498765432

2. The survey can be accessed using the UserID and a password, i.e. from the mobile telephone registered to the respondent and including his/her password. In this case the respondent would start the survey by sending the keyword and the password, for example "CAR myPassword" from his/her mobile telephone to a number registered as a Sender ID (see The SMS Surveys Tab on page 27 for more information).

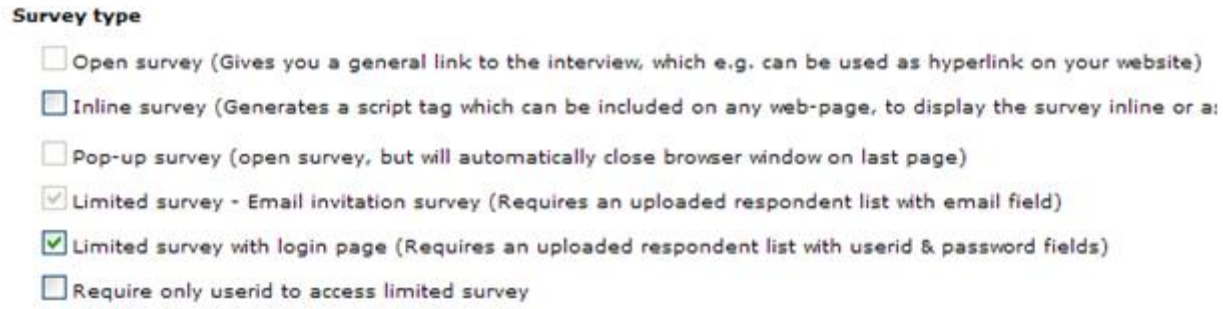


Figure 21 Setting access via login

The uploaded respondent list would need to include the respondent's UserID (the mobile telephone number registered to that respondent, including the country code) and their password, for example:

UserID	Password
4412345678	hispassword
4498765432	herpassword

5.3.4. Sending SMS Invitations via Email

Invitations to participate in an SMS survey can be sent to the prospective respondents via SMS using the Confirmit email functionality. In this case you will need to set up the invitation email using the **Email Details** page (in the Questionnaire Tree toolbox, "Invitation and reminder emails" folder, double-click on the email object), and include in the text of the email instructions for how the respondent can start the survey.

All email invitations must be sent to the SMS provider's gateway address. For each respondent you then need to upload the SMS provider's gateway address, for example:

Name	UserID	Email
Respondent1	4412345678	4412345678@emailtosms.infobip.com
Respondent2	4498765432	4498765432@emailtosms.infobip.com

The format and syntax of the text body will be defined by the SMS provider. Note that not all SMS providers support email-to-SMS.

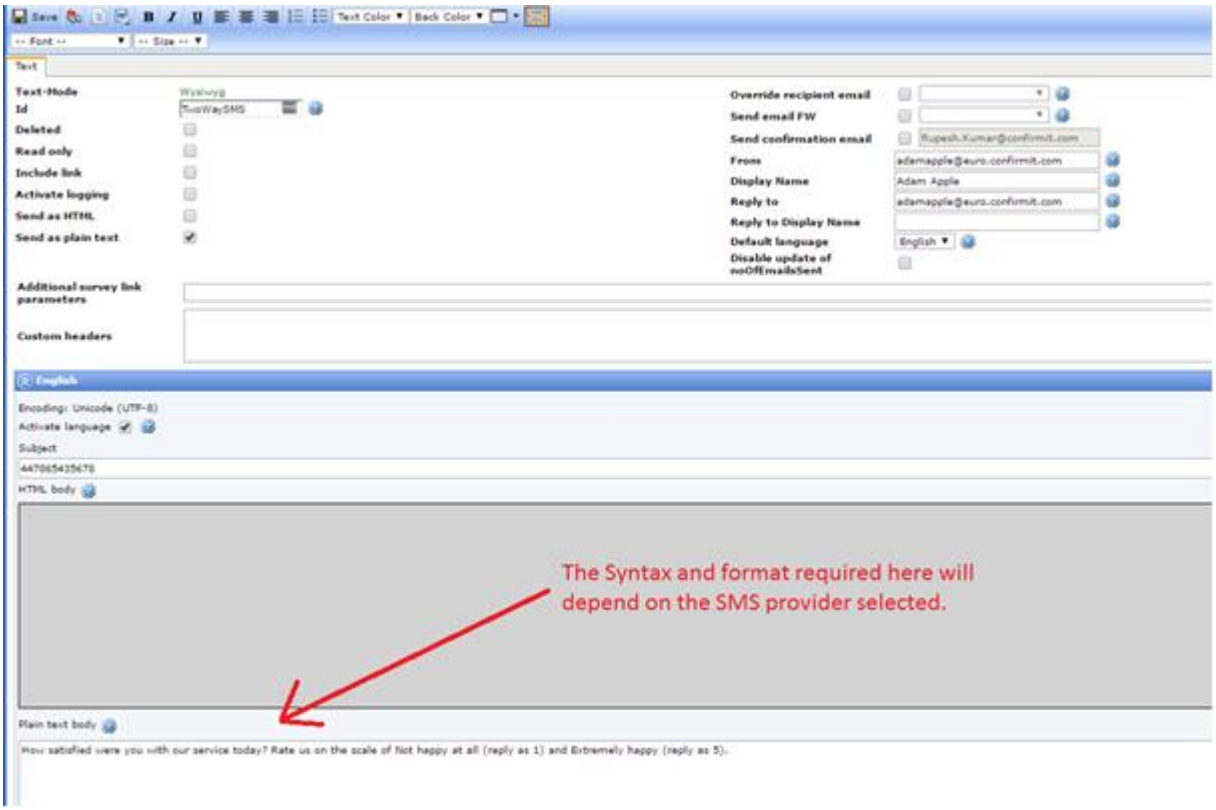


Figure 22 Example of an email invitation to participate in a Two Way SMS survey

5.3.4.1. Intelecom Mail Invitations

When using an Intelecom shared number, all invitations must be formatted as follows:

```
<Mobile number>-<serviced>-RNSO@sms.carrot.no
```

For example: '+4712345678-1666-RNSO@sms.carrot.no'

5.4. Stop Commands

If a respondent for any reason wishes to stop participating in the survey sent via SMS by your company, he/she can send a "Stop" command. If the respondent replies with one of the keywords "STOP", "END", "CANCEL", "UNSUBSCRIBE", "QUIT", "STOP STOP", or "STOP ALL", the survey will be ended and the respondent will receive an SMS message stating that he will no longer receive any SMS messages from this number. Note that keywords are not case-sensitive.

5.5. Scripting

Scripting can be performed within the survey to extract details and send SMS messages.

5.5.1. Request Parameters

Scripting can be used within an SMS survey to extract for example respondent details. Request parameters available to survey script include:

- **SMS_CLI** - will find the respondent mobile number.
- **SMS_InitialReply** - if the survey is initiated with an initial reply (the respondent starts the survey by providing the answer to the first question), then this will find the reply.

  For example:

```
Request["SMS_InitialReply"];
```

If the survey was started with **shop 1234**, then the method call will return **1234**.

- **SMS_SenderId** – the SenderId (long number or short code) that the respondent sent the SMS message to. This can be used for example in a SendSMS script as the "from" parameter to force the SendSMS script extension to use the SMS provider associated with the SenderId when sending the SMS message. See the example below.

5.5.2. Sending an SMS Message from Within a Survey

You can trigger an SMS to be sent from a script within any survey where the SMS extension is enabled, even when the respondent is responding through a different channel. This is done through the PostRequest method:

```
var ext = Extension("SmsSurveyScript");
ext.PostRequest("SendSMS", p, ms);
```

where **p** is a Hastable with **to** (SMS recipient number), **from** (one of the Sender IDs configured for the company) and **text** (SMS text), and **ms** is the expiry time for the call from the survey script to the extension in milliseconds, defining the maximum time the survey script will wait for a reply from the Extension. The SMS will be sent via the SMS provider matching the Sender ID in **from**.

Below is an example of a SendSMS function using the PostRequest method and the Request parameters described above to trigger an SMS to be sent from a script in an SMS survey:

```
function SendSMS()
  {
    var ext = Extension("SmsSurveyScript");
    if(ext.IsValid)
    {
      var p = new Hashtable();
      p["to"] = Request["SMS_CLI"];
      p["from"] = Request["SMS_SenderId"];
      p["text"] = "hello world";
      var result = ext.PostRequest("SendSMS", p, 8000);
      if(result.IsValid)
      {
         return result["Status"];
      }
      return "Result is invalid";
    }
    return "Extension script name is invalid";
}
```

The capability to send SMS messages from within a survey can be very useful for example in a panel registration survey where you would like an extra step for the respondent to confirm their identity. You could ask for the respondent's mobile number, and send a pin code to their mobile and only accept registrations where the respondent types in the correct pin code.The procedure to do this is:

Assuming you have an account with one of the supported providers, and the provider is configured:

1. Enable the SMS survey extension on the survey.
2. Insert three open text questions; one for the generated precode ("pincode" – hidden), one for the mobile phone number ("phone"), and one for the respondent to type in the pincode ("verifypin").

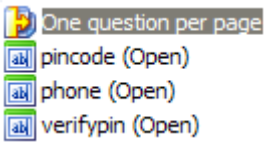


Figure 23 The questions added to enable verification of identity

3. In the "phone" question, insert the following script in the validation code (replace "XXXXXXXXXXX" with the sender phone number of your SMS provider:

```
//Set pin code
var pin : String;
pin = Math.floor(Math.random()*10).toString()+
Math.floor(Math.random()*10).toString()+
Math.floor(Math.random()*10).toString()+
Math.floor(Math.random()*10).toString();
f("pincode").set(pin);

//Send pin code in email

var ext = Extension("SmsSurveyScript");
if(ext.IsValid)

  {
   var p = new Hashtable();
   p["to"] = f("phone");
   p["from"] = "XXXXXXXXXXX";
   p["text"] = "Pin code; "+f("pincode");
   var result = ext.PostRequest("SendSMS", p, 8000);
   if(!result.IsValid)
    {
     RaiseError();
     SetQuestionErrorMessage(LangIDs.en,"SMS Sending failed.");
    }
  }
  else
  {
   RaiseError();
   SetQuestionErrorMessage(LangIDs.en,"SMS Sending failed. Extension
script name is invalid");
}
```

4. In the "verifypin" question, insert the following script in the validation code to verify that the supplied pin matches the one sent in the SMS:

```
if(f("pincode").get()!=f("verifypin").get())
  {
   RaiseError();
   SetQuestionErrorMessage(LangIDs.en,"Invalid pin code.");
  }
```

6. Confirmit Question Extensions

Flex extensions allow you to add several special types of questions to your survey. When the functionality is activated, an additional toolbox appears in the Questionnaire Tree providing access to the extensions you have licensed.

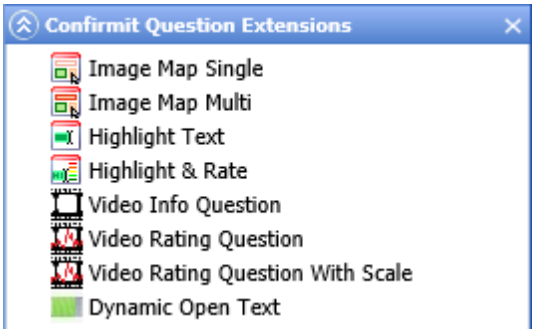


Figure 24 The Confirmit Question Extensions toolbox

Important
Flex extensions apply only to web surveys. These additional question types are not supported by CAPI, and they are not supported by Smartphone or Generic mobile rendering. To switch off SmartPhone and Generic mobile rendering for just one question, place the question in a page object and enable the page's Force desktop rendering property.

6.1. Image Mapping

Important
The Image Mapping extension is an Add-On. Commercial terms will apply.

The Image Mapping extension enables you to include special single or multi questions in your survey, where the question is an image and areas in that image are the answers to the question. The respondent clicks on areas in the image to select his/her answers. The Image Map functionality is only supported for these special single or multi questions.

For example, a question in your survey could be "Which modes of transport have you used in the last month?" An image containing pictures of a car, a bicycle, a train, a bus, an airplane, a horse etc. could then be presented to the respondent, with each picture being an answer option. The respondent would then click on the appropriate items in the image to select them.

You create the answer options by drawing shapes on the image. Each shape is then mapped to an answer code in the question's Answers tab. **Note that you must add the required answer codes to the Answers tab manually; the codes are not added automatically.**

Three types of shape are available; rectangles, circles and polygons (shapes with any number of corners). Once drawn, rectangles and circles can be moved, resized and modified. The polygon shapes cannot be moved from their initial positions but corners of the polygons can be modified, moving each corner individually.

Note: Every shape in the image must have a corresponding answer code in the question's Answers tab. The answer codes are not created automatically – you must create them manually. Note also that if you create an image map shape and its corresponding answer code in the Answers tab, and later delete the shape, you do not need to go to the Answers tab and delete the answer code – "unused" codes will merely be ignored.

The image map shapes have a right-click menu, allowing you to modify, duplicate or delete the shape (see The Shape's Right-Click Menu on page 43 for more information).

6.1.1. Applying Changes and Saving

When you have made changes to the Image Map configuration, or added or modified shapes, you must save those changes by clicking the **Save & Apply** button located towards the bottom of the Image Map Configuration panel. If you leave the Image Map tab before clicking **Save & Apply**, the changes will not be saved. When you have finished editing the question, you must also click the **Save** button on the Question Details page to save the changes to the question.

Important
The Image Map regions and associated meta data are always available to the live survey. Once the survey has been launched with the Image Map question(s), any changes you later make to the shapes or configuration, when saved using the Save & Apply button, will immediately be included in the survey. You will therefore be working on a live survey. No survey relaunch is necessary to apply the changes in the live survey.

Note: All major browsers support the Image Map question type including IE8+, Chrome, Safari, Mozilla Firefox, and Opera. The Image Map Configuration tab used for drawing and configuring your Image Maps is currently only supported by Chrome and Firefox browsers.

6.1.2. Using the Image Map Extension

When the Image Map extension is activated for your company, the Confirmit Question Extensions toolbox appears in the toolbox pane and includes this extension.

To add an Image Map question to your survey, drag and drop the appropriate question type into the desired location in the Questionnaire Tree, or place the mouse pointer at the appropriate place in the Questionnaire Tree, right-click and select **Insert After > Confirmit Question Extensions** and select the desired question type.

Note: Only one Image Map Question per survey page is supported at present. You may not add more than one Image Map question to appear on a single page.

The question designer page opens. In addition to all the “standard” tabs used by the Single or Multi questions, the Image Map questions also have the Image Map and Image Map Report tabs, highlighted in pale green.

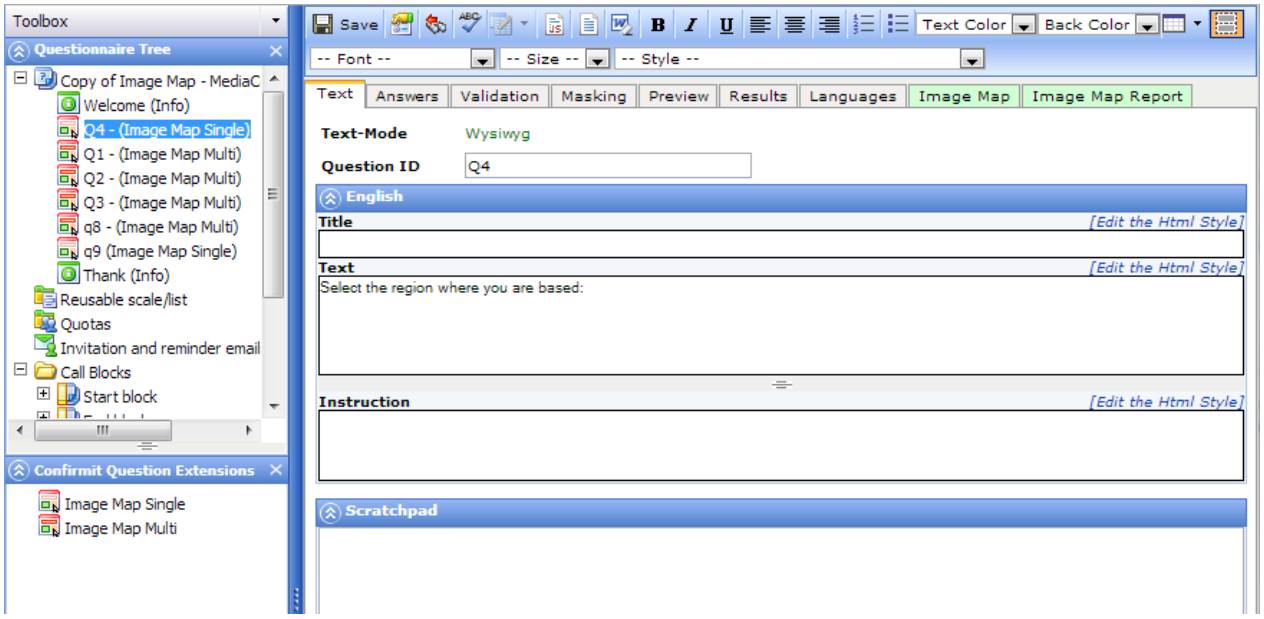


Figure 25 The Question Editor page for an Image Map question

The Text tab, Answers tab etc. are the same as for “standard” single/multi questions – add the desired title, text and instructions, then go to the Image Map tab to load the image and create the mappings.

6.1.3. The Image Map Tab

When you go to the Image Map tab, the page shown below opens. Once you have added the URL to the image that is to be used, the empty area to the right will contain the image.

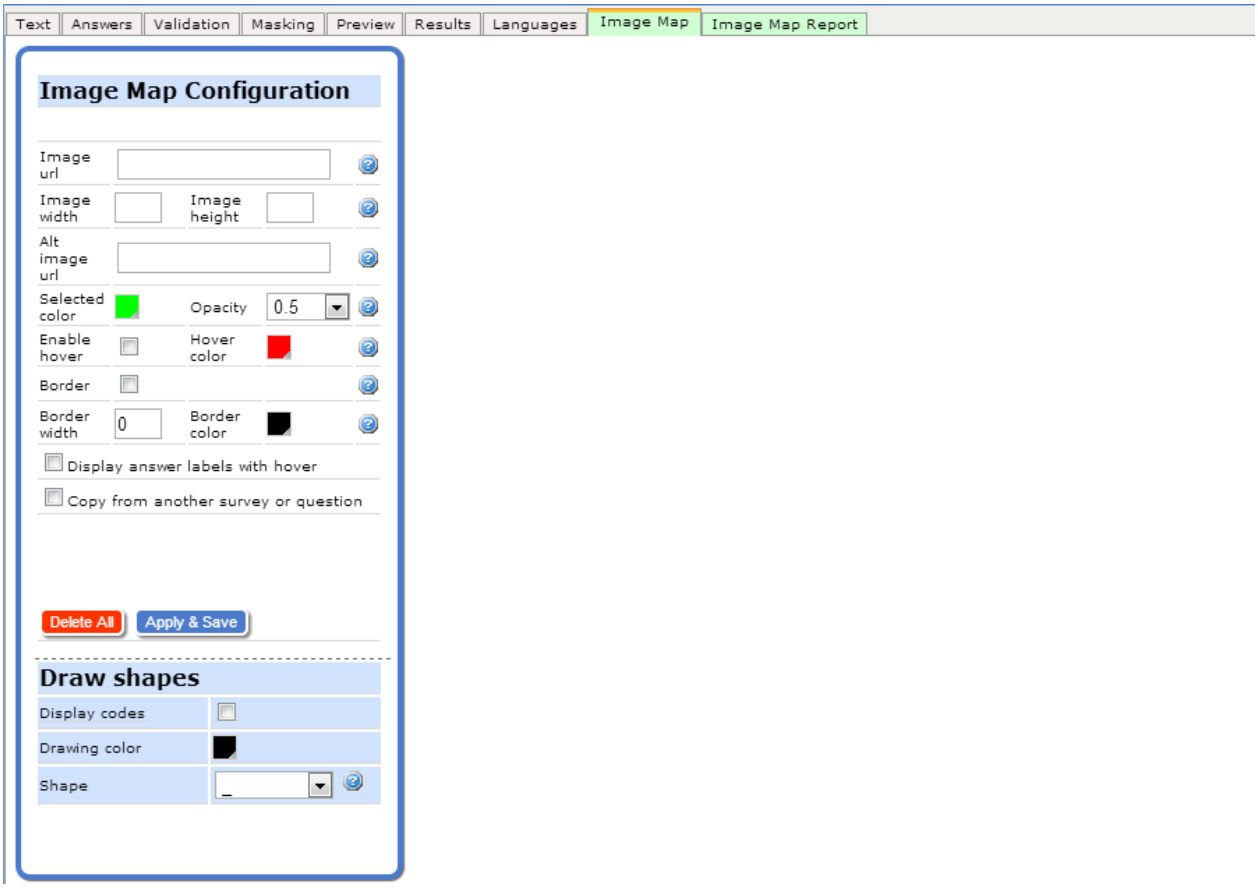


Figure 26 The Image Map tab

6.1.3.1. Configuring the Image Map Question

The configuration you set up will apply to the image and all the shapes you create in the image map question. You can draw the shapes in any color, but changing the color properties in the Image Map Configuration will change the color properties of all the shapes on your image; you cannot draw some shapes in one color and then draw other shapes in a different color. Images used in different Image Map questions can have different configurations.

1. Copy the URL to the image you wish to use into the Image URL field.

Note: To ensure the image is always available to the survey, Confirmit recommends that the image is stored in the File Library (refer to the Authoring User Guide for further details). If the image is stored on a different server and that server is unavailable for any reason, then the survey question using the image will not function.

2. Type the image width and height, in pixels, into the fields.

   If the values you type in are different from the actual values for the image, then either the image will have blank stripes around it or it will be clipped.

3. If an alternative image is to be used, copy its URL into the field.
4. Select the colors, opacity and border width to be used as appropriate.

5. Click **Apply & Save** to save the configuration.

You are now ready to draw the required shapes.

6.1.3.2. How to Create the Image Map Shapes

1. In the Draw Shapes area, click the down-arrow beside the Shape property to open the drop-down, and select the type of shape you wish to use.
2. Select whether you wish to display the automatically-created codes.

   Display Code is only available in the Configuration tab. The Codes will not be visible to respondents in the survey.
3. If you are creating a rectangle and wish to divide this into squares, check the Split Rectangle… box and specify an edge length for the squares (in pixels) (see Splitting a Rectangle on page 44 for more information).

Note: No more than 300 areas are allowed in an Image Map question.

4. Select the color you wish to use whilst drawing the shape. Note that this will change to the color and opacity selected in the upper set of properties once the shape is saved.
5. Move the mouse pointer to the image and position it at the start point for your shape.
6. Click the left mouse button and create the shape.
   - **Rectangle** – start at one corner, click and drag in any direction to the diagonally opposite corner. Once you release the mouse button, the shape will be locked until it is created and you select Modify.
   - **Circle** – start at the center of the intended circle and drag in any direction to the desired radius. Once you release the mouse button, the shape will be locked until it is created and you select Modify.
   - **Polygon** – position the mouse pointer at the point where you wish to start drawing and click the left mouse button. Move the pointer to the next “corner” and click again. Continue moving and clicking until you have created the desired shape.

   In all cases, a “provisional” shape is created in the selected color.

Note: Shapes cannot touch or overlap. If you move the mouse pointer out of the image or into an existing shape before you have confirmed the creation (see below), then the provisional shape will be removed from the image.

7. Once your provisional shape is as you want it (note that you can modify it and move it later), right-click on the shape to open the Confirmation dialog.

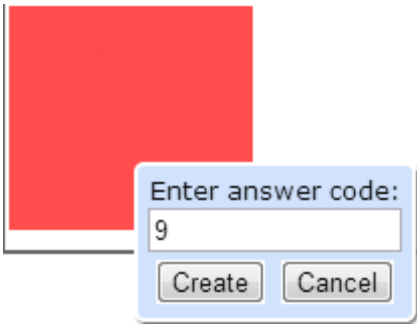


Figure 27 The Confirmation dialog

   An answer code is automatically generated, this being the next available number in numerical order. You can change this code if required. You may use an alpha-numeric code that matches a code in the question's Answers tab, however for simpler access Confirmit recommends that you use simple numeric codes.

8. Click **Create** to create the shape, **Cancel** to remove it from the image.

Note: Every shape code number in the image must have a corresponding answer code in the question's Answers tab. The answer codes in the Answers tab are not created automatically – you must create them manually.

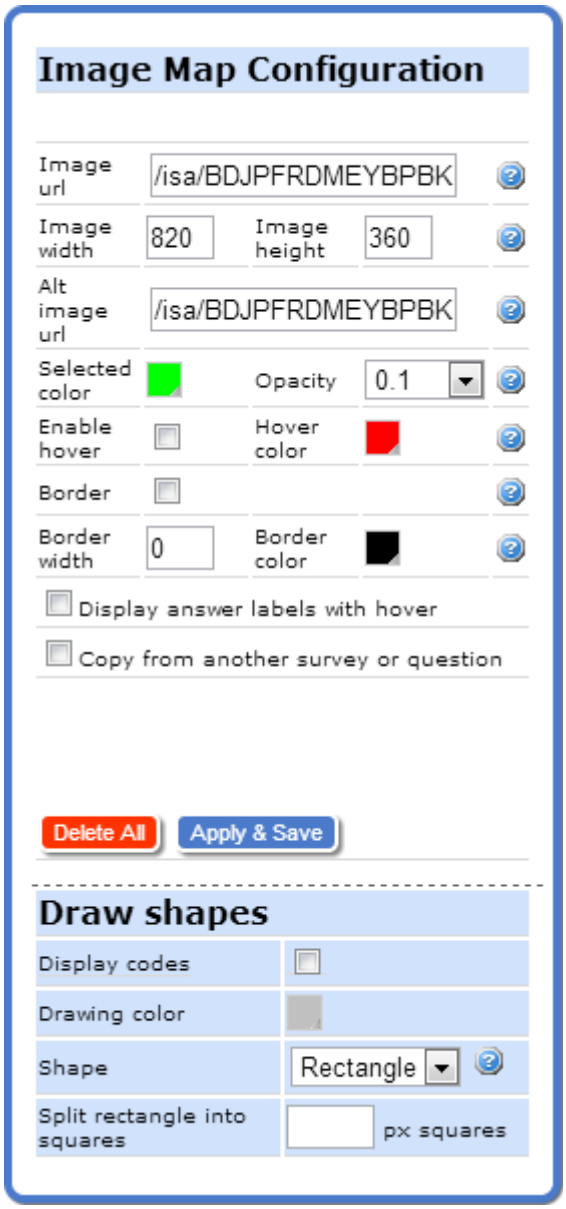
To modify the shape, right-click on the shape and select **Modify** or double-click on the shape.

9. On completion, click **Apply & Save** to save the shape.

Note: If you are creating several shapes, when you select a new shape type in the Shape drop-down the image map will be saved automatically. Note that Autosave is only applied when a new shape is selected from the drop-down; if you create more of the same shape then Autosave will not occur until a new shape type is selected.

6.1.3.3. The Configuration Pane Properties and Fields

Note: Changes to the configuration settings will not be implemented by the Image Map tab until you save them by clicking Apply & Save.



The properties and fields are as follows:

- **Image URL -** the URL to the image you wish to use.
- **Image width –** the width of the image area displayed to the respondent, in pixels. Set the width of the image area to be identical to the width of the image to be used. If the width set is smaller than the width of the image used, then the image will be clipped.
- **Image height –** the height of the image area displayed to the respondent, in pixels. Set the height of the image area to be identical to the height of the image to be used. If the height set is smaller than the height of the image used, then the image will be clipped.
- **Alt image URL –** the URL to an alternative image. Areas of this image corresponding to the shapes you have drawn will be displayed to the respondent when he/she selects those areas. For example, if the initial image you load is a gray-scale picture or a line diagram, you can improve the respondent's experience by also loading a color version of the image. Then when the respondent selects an answer (a shape), the alternative image area for the selected shape will be displayed. So the areas selected by the respondent will appear in color on an otherwise gray-scale or line image. If an Alt Image URL is used, the "Selected color" option will be ignored.

- **Selected color –** if the Alt image URL property is not used, then areas selected by the respondent will be given this color. Click on the color example square to open a color selection chart, then either select a standard color or type a color code into the Hex field.
- **Opacity –** you can set the opacity of the selected color such that the selected color does not completely hide the image area. 1 means the color is completely opaque, 0 means there is no color.
- **Enable hover –** you can set a color for the shape which will be applied when the respondent hovers the mouse pointer over it. Check this box to enable the functionality.
- **Hover color -** you can set a color for the shape which will be applied when the respondent hovers the mouse pointer over it. Click on the color example square to open a color selection chart, then either select a standard color or type a color code into the Hex field.
- **Border –** you can add a border to the shape. Check this box to activate the border functionality.
- **Border width –** set the desired width of the border, in pixels.
- **Border color -** you can set a color for the border. Click on the color example square to open a color selection chart, then either select a standard color or type a color code into the Hex field.
- **Display answer labels with hover** - check to display the answer label for a shape when the respondent hovers the mouse pointer over that shape.
- **Copy from another survey or question -** to simplify the creation procedure, once you have created an Image Map question in the Questionnaire Tree, you can copy the Image Map Configuration data and settings (Image URL, colors, created shapes etc.) from another question in this survey or a different survey, into the new Image Map question. When you check this box, two additional fields appear:
    - **Survey Id -** this is the Survey Id of the survey containing the question from which you wish to copy the Image Map Configuration data and settings, The current survey is input here by default; change as appropriate.
    - **Question Id -** type into this field the Question Id of the question from which you wish to copy the configuration. On completion, click **Copy**. All the Image Map Configuration data and settings of the selected question are then copied into this question. You can now make any changes to the configuration and shapes as required. Click **Apply & Save** on completion.
- **Delete All –** click this button, then confirm, to delete all the shapes that have been drawn in the current image. Note that any answer codes you may have added to the question's Answers tab will not be deleted. If you wish to delete the answer codes you must do this job manually, though there is no requirement to do so.
- **Apply & Save –** any changes you make in the Image Map tab must be saved by clicking here. Note that clicking the **Save** button for the Question Details page will not save these changes.
- **Display codes –** each shape is automatically given the next available numerical answer code when the shape is created. You can edit the answer codes as required, and you must enter the answer codes manually into the question's Answers tab. Check this box to display on the image the answer codes for each shape.
- **Drawing color –** to make the shape easier to see while you are drawing it, you can set a color for the shape. Once the shape is created, the color and opacity will change to that specified in the Selected color and Opacity properties. Click on the color example square to open a color selection chart, then either select a standard color or type a color code into the Hex field.
- **Shape –** click in the field to open the selection menu, and select the type of shape you wish to draw. If you select Rectangle, an additional field appears:
    - **Split rectangle into squares -** a rectangle shape can be divided automatically into squares of a given size when the shape is created (see Splitting a Rectangle on page 44 for more information). These smaller squares are then individual shapes, and each can be modified, duplicated or deleted separately. To use this functionality, specify an edge length in pixels for the squares that are to be created.

6.1.3.4. The Shape's Right-Click Menu

Right-click on a shape in the image to open the right-click menu for that shape.

Figure 28 The shape's right-click menu

- **Modify –** select to modify the shape. The anchor squares appear, allowing you to drag them as required to alter the shape's form. Click in the shape to get the "pointing hand" icon, then drag the shape to the required location in the image. Note that a polygon cannot be moved as-is; to move it you must move each corner individually. The Modify option can also be invoked by double-clicking on a shape.
- **Duplicate –** duplicates the selected shape. Right-click on the duplicate and enter an answer code, then click **Create** to create the shape. Once it is created, click on it and drag it to the desired location in the image, then click **Apply & Save** to save the changes. This is then an independent shape that can be modified, duplicated etc. as any other.
- **Delete –** deletes the selected shape. Don't forget to click **Apply & Save** or the shape will reappear when you go out of the Image Map tab and later return. Note that when you delete a shape, if you have added a corresponding answer code in the Answers tab then this will not be deleted automatically; you must delete the code manually. However you do not have to go to the tab and delete the answer code; "unused" answer codes will merely be ignored.
- **Cancel –** click to close the right-click menu.

6.1.3.5. Splitting a Rectangle

A rectangle shape can be divided automatically into squares of a given size when the shape is created. These smaller squares are then individual shapes, and each can be modified, positioned, duplicated or deleted separately. When the rectangle is created, its width and height will be adjusted automatically up or down to fit to the nearest square.

1. In the Draw Shapes area, select the Rectangle shape.
2. Check the Split rectangle into squares box and type the required pixel dimension into the larger field.
3. Create the rectangle.

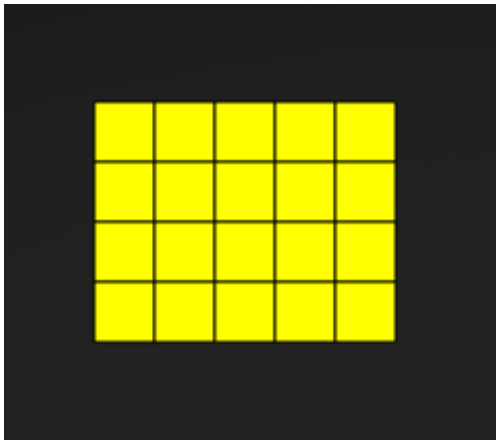


Figure 29 Example of a rectangle split into squares

4. Modify the individual squares as required.

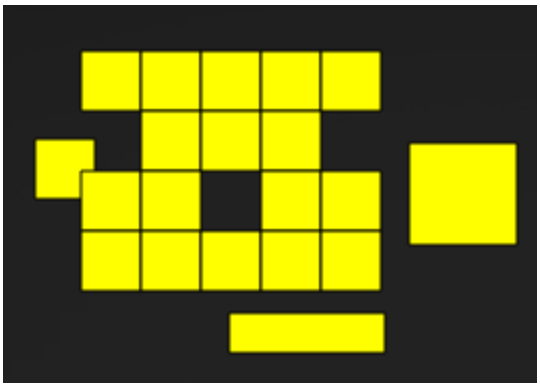


Figure 30 Modifying the squares

5. On completion, click **Apply & Save** to save the changes in the Image Map database.

6.1.3.6. The Hover Color

You can set a “hover” color for the shapes so that when the respondent hovers his/her mouse pointer over the shape it will become visible in the image.

1. Check the Enable Hover Effect box.
2. Select a color in the Hover Color field.
3. Click **Apply & Save** to save the changes.

6.1.4. The Image Map Report Tab

The Image Map Report tab displays the code you must copy to a report wizard (refer to the Reportal User Guide) if you wish to include the Image Map question in that report wizard.

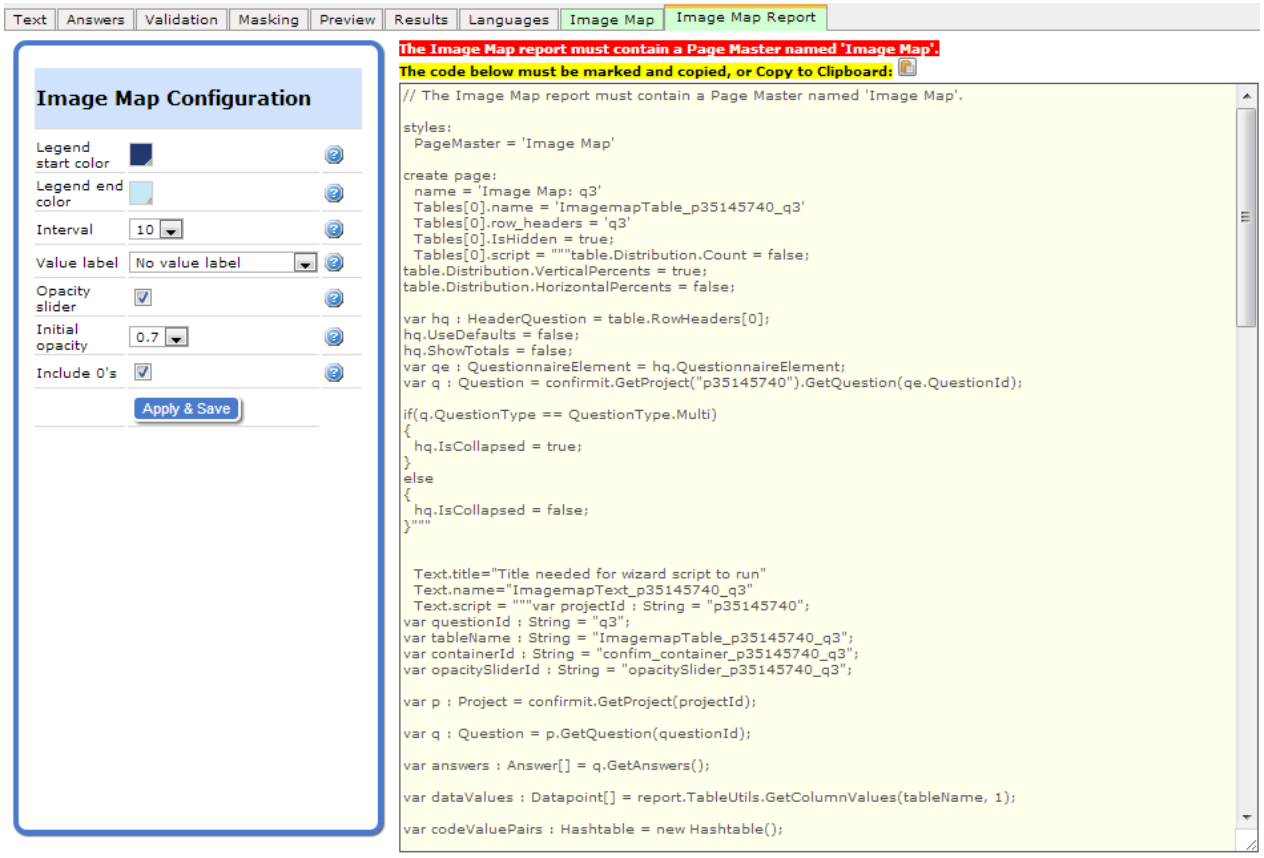


Figure 31 Example of the Image Map Report tab

Important
The report for which you want to run the report wizard to create an Image Map report page, must include a Page Master named 'Image Map' and this Page Master must include a Report Page area. If the report does not include such a Page Master with a Report Page area you will get an error when running the wizard in the report.

To copy the script to a report wizard:

1. Click into the script area and select all (**Ctrl+A**).
2. Click the **Copy to clipboard** button.
3. Go to Reportal and in the Quick Access pane open the Wizard List.
4. Open an existing report wizard or create a new.
5. In the Wizard Editor overlay, go to the Script tab, click into the tab and paste the script into the tab.
6. Save the changes.

To run a wizard script in an existing report:

1. Right-click on the position in the report where you want to insert the Image Map page.
2. Select **Insert From Wizard**.
3. Select the wizard you want to run.
4. Click **Finish**.

This will start a task that runs the wizard script and adds an Image Map page to the report.

When the script is run, a page is created containing a table and a text component. The table contains the data from the questionnaire that is to be presented in the image map page. The text component contains all the code that is used to create the image map and the shapes etc. The table is hidden so will not be seen by the report viewer.

6.1.4.1. The Image Map Report Tab Configuration Pane

The configuration properties in the Image Map Report tab allow you to specify legend, label and opacity settings. The properties are as follows:

- **Legend start color –** the legend that will be included on the report page showing the results for the image map question will be color-graded. Each step in the legend will be given a different color. This property sets the starting color for the legend intervals.
- **Legend end color –** sets the end color for the legend that will be included on the report page showing the results for image map question.
- **Interval –** sets the step-interval for the legend values.
- **Value label -** value labels can be displayed in the various areas in the image map such that report viewers can see the values accorded to those areas. The three options for this property are:
  - **Always value label -** the value labels are always displayed.
  - **Value label on hover -** a value label is displayed for an area in the image map when the user hovers the mouse pointer in that area. The label disappears when the pointer moves out of the area.
  - **No value label -** value labels are not displayed in the image map.
- **Opacity slider -** check to display a slider bar on the report page such that the report viewer can set the opacity of the shapes in the image map.
- **Initial opacity -** sets the "start" opacity of the slider bar. The report viewer can then change the opacity as required.
- **Include zeros -** check to include all labels (as specified by the Value label property) and image map shapes irrespective of their values. If this property is not checked, image map shapes and associated labels will only be displayed if they have non-zero values.
- **Apply & Save -** any changes you make in the Image Map Report tab must be saved by clicking here. Note that clicking the **Save** button for the Question Details page will not save these changes.

6.2. Text Highlighter

The Text Highlighter extension enables you to include two question formats in a survey; for selecting parts of a text, and for selecting parts of a text and rating the selection.

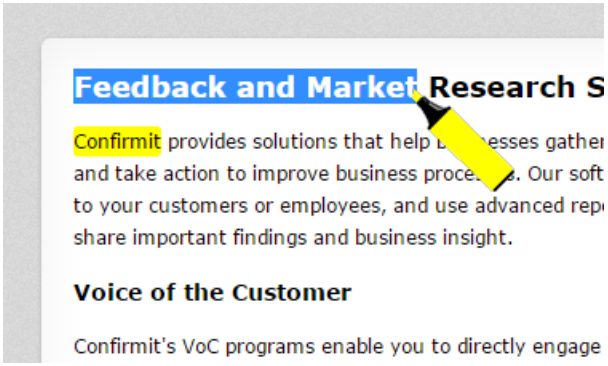


Figure 32 Highlighting text

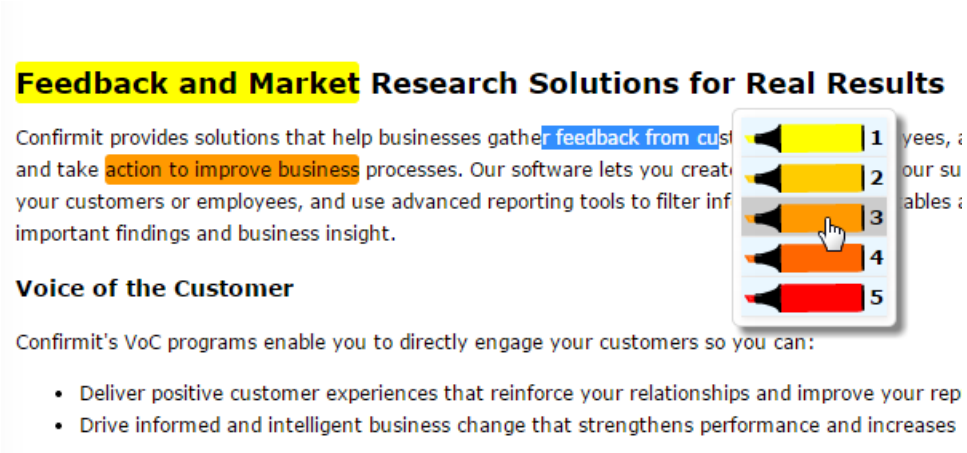


Figure 33 Highlighting and rating text

Both question types will store the selected text in an open text list. The Highlight & Rate question will also store the score in a grid question.

6.2.1. Using the Text Highlighter Question Types

When Confirmit Question Extensions is activated for your company, the Confirmit Question Extensions toolbox appears in the toolbox pane.

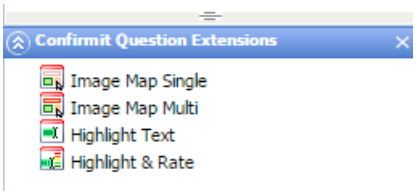


Figure 34 The Question Extension toolbox

To add a Text Highlighter question to your survey, drag and drop the appropriate question type into the desired location in the Questionnaire Tree, or place the mouse pointer at the appropriate place in the Questionnaire Tree, right-click and select **Insert After > Confirmit Question Extensions** and select the desired question type.

The question designer page opens. In addition to all the “standard” tabs used by the Folders, the Text Highlighter questions also have the Settings tab, highlighted in pale green.

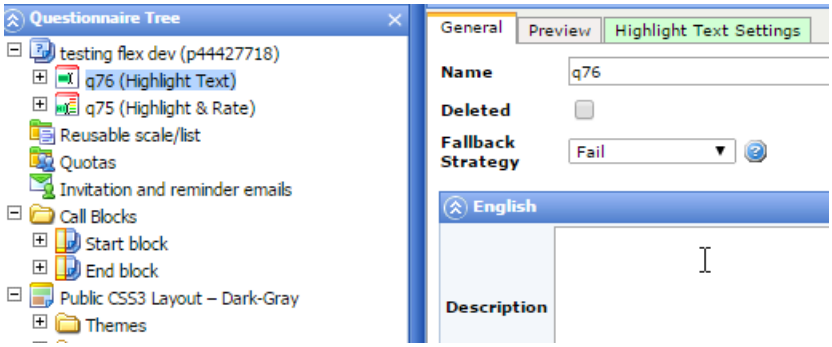


Figure 35 The Text Highlighter question Settings tab

Note that a Text Highlighter question is actually a folder containing multiple predefined questions. You can see the underlying questions by expanding the node in the Questionnaire Tree. If you rename the folder node, the question ids of the questions inside the folder will be automatically updated with this new name.

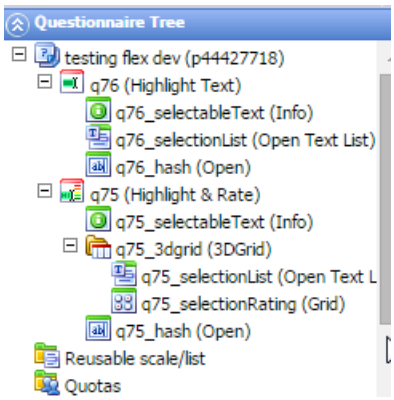


Figure 36 The underlying questions within the node

6.2.2. The Highlight Text Question

This type of question allows the respondent to highlight sections of text as the answer(s) to the question.

6.2.2.1. Highlight Text Question Overview

When you add a Highlight Text question into the questionnaire tree, a folder containing three questions is included.

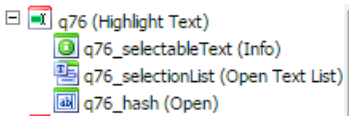


Figure 37 The Highlight Text question

The folder (top) node holds the settings for the question. Inside the folder there is an Info node, an open text list and an open text.

- The info node (selectableText) holds the text you want the respondent to select from. This text can contain HTML and must be added in the Question text area of the node.
- The Open Text List (selectionList) holds the title, question text and instruction for the entire question. Here you also add the answer list which determines how many words/phrases the respondent can select.
- The Open Text (hash) is used to hold meta data for the respondent's selections so they can be re-highlighted in the event the respondent re-enters the page. This question should not be changed.

6.2.2.2. How to Set Up a Highlight Text Question

A Highlight Text question consists of multiple sub-questions. Follow the procedure below:

1. In the **selectableText** info node, go to the question text area and add the selectable text. This can have HTML formatting.

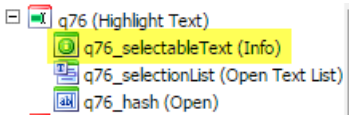


Figure 38 The selectableText info node

2. Add the number of answers you want to collect in the answer list for the Open Text List (selectionList).

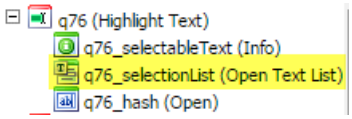


Figure 39 The selectableList node

3. Add the question title, text and any instructions in the Text tab of the Open Text List.
4. Open the top node and go to the Highlight Text Settings tab.

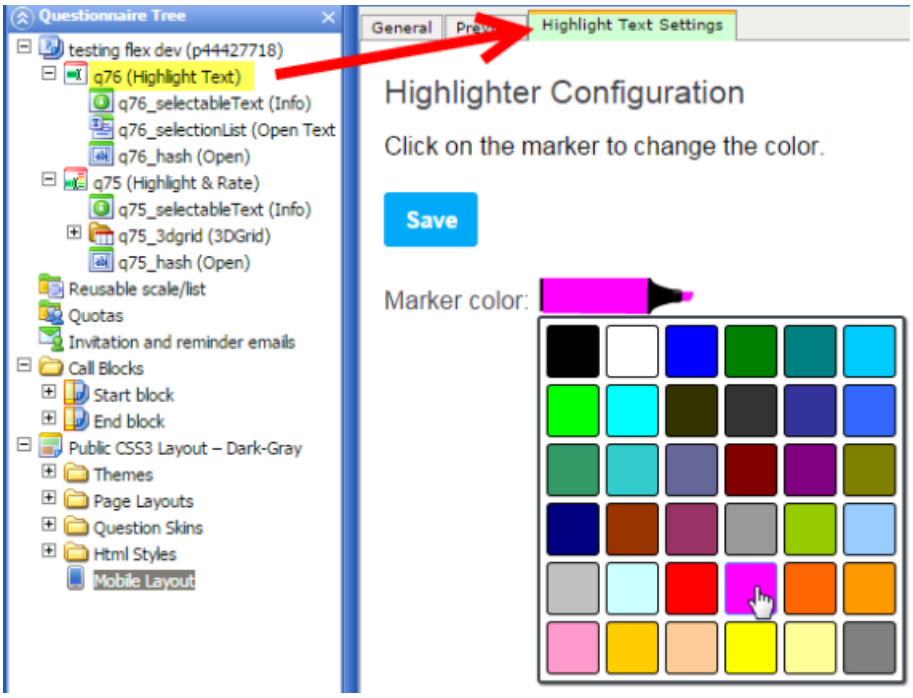


Figure 40 The Highlight Text Settings tab

5. To select the desired the marker color, click the marker pen and select a color with the color picker.
6. Click **Save**.

   To preview the question, go to the Preview tab in the top node (Highlight Text).

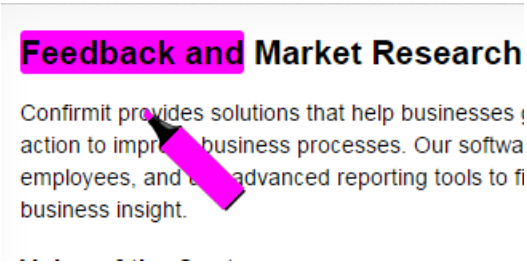


Figure 41 Previewing the setup

7. Launch the survey to apply the changes in production.

6.2.3. The Highlight and Rate Question

This type of question allows the respondent to highlight sections of text, and rate those sections, as the answers to the question.

6.2.3.1. Highlight And Rate Question Overview

When you add a Highlight & Rate question in the questionnaire tree, a folder containing three questions is included.

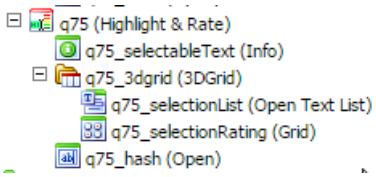


Figure 42 The Highlight & Rate question

The folder (top) node holds the settings for the question. Inside the folder there is an Info node, a 3DGrid and an open text.

- The info node (selectableText) holds the text you want the respondent to select from. The text can contain HTML and must be added in the Question text area of the node.
- The 3DGrid holds the title, question text and instruction for the entire question. Here you also add the answer list which determines how many words/phrases the respondent can select.
- Inside the 3DGrid there is an Open Text List (selectionList) which is used to store the selected text. There is also a Grid question (selectionRating); here you add the scale which is used to rate the selected text.
- The Open Text (hash) is used to hold meta data for the respondents selections so they can be re-highlighted in the event the respondent re-enters the page. This question should not be changed.

6.2.3.2. How to Set Up a Highlight Rate Question

A Highlight Text & Rate question contains a number of sub-questions. Follow the procedure below:

1. Add the selectable text (this can have HTML formatting) into the question text field for the selectableText info node.

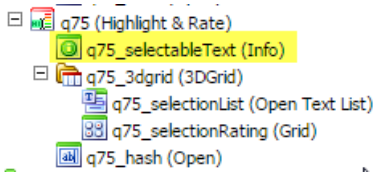


Figure 43 The selectableText (Info) node

2. Add the number of answers you want to collect into the Answer List for the 3DGrid.

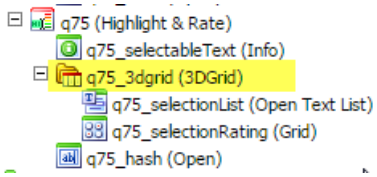
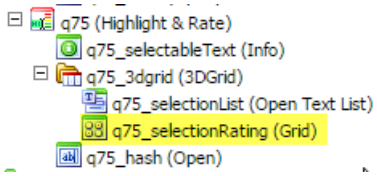


Figure 44 The 3DGrid node

3. Add the question title/text/instruction into the Text tab of the 3DGrid.
4. Add the scale you wish to use into the Scale of the Grid question.



5. Open the top node in the question and then go to the Settings tab.

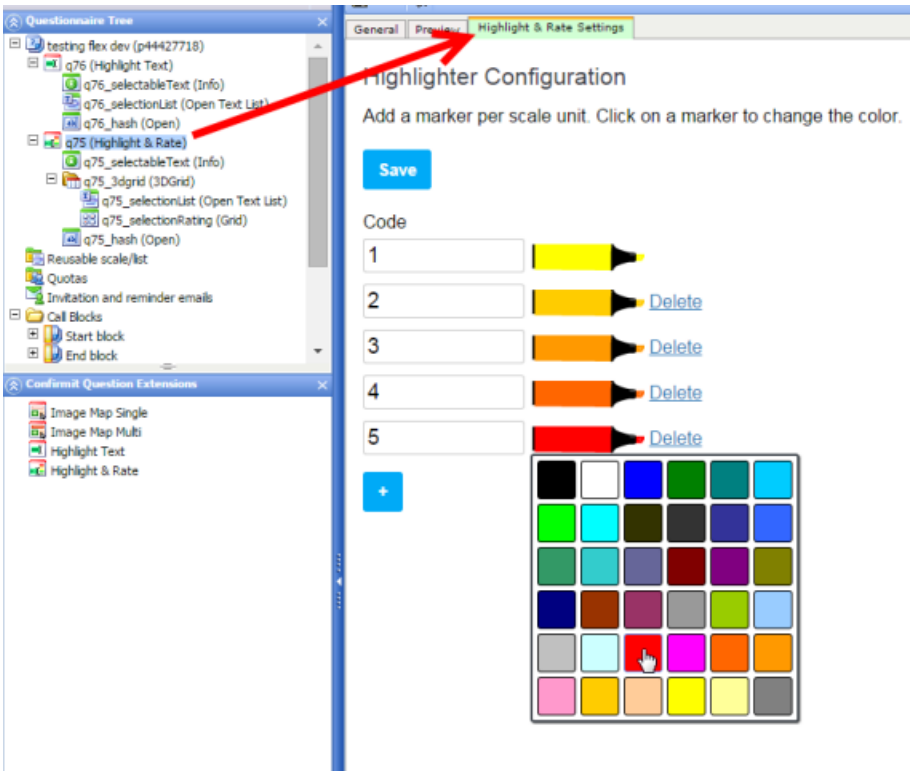


Figure 45 The Highlight and Rate Settings tab

6. By clicking the **+** button, add the same number of codes as you have added to the scale in step 4, and update the codes to reflect the scale you created in step 4 of this procedure.

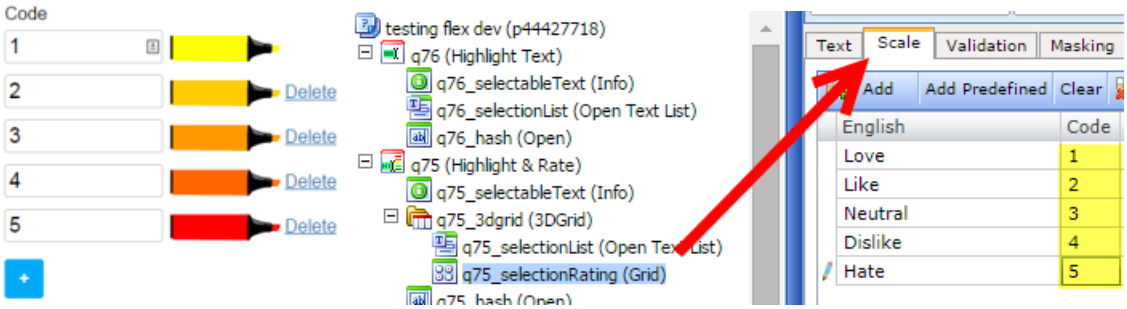


Figure 46 Adding and updating the codes

7. Change the marker color for each item by clicking the marker pen and selecting a color with the color picker.
8. Click **Save** to save your changes.
9. To preview the question, go to the Preview tab in the top node (Highlight & Rate).

Figure 47 Previewing the setup

10. Launch the survey to apply the changes in production.

6.3. Dynamic Open Text

The Dynamic Open Text (DOT) extension is a standard Open Text question with additional prompt functionality. This enables you to add prompts and encouragements to the open text question that will hopefully elicit more detail in the responses. The extension adds a "progress bar" to the response field that fills with color and encouragement as the respondent types text into the field, and prompts for additional detail can be displayed if specified keywords are used by the respondent. For example, if the question asks the respondent his/her opinion of the service they received in your store and the respondent uses the word "staff", "cashier" or "salesperson" in his/her reply, then you could add a prompt asking for the name of the member of staff.

Figure 48 Example of a Dynamic Open Text (DOT) question showing the 'encouragement' bar and a prompt

You can add multiple Dynamic Open Text questions to a page, copy the configuration settings from a DOT question in another survey, and capture keywords a respondent may type.

Note: This question type cannot be used with triggers. Refer to the Confirmit Professional Authoring User Guide for further information on triggers.

6.3.1. Using the Dynamic Open Text Question Type

When Confirmit Question Extensions is activated for your company, the Confirmit Question Extensions toolbox appears in the toolbox pane.

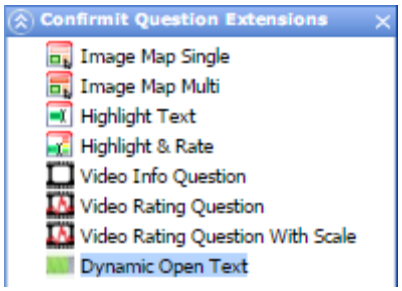


Figure 49 The Question Extensions toolbox

To add a Dynamic Open Text question to your survey:

1. Drag the question type from the toolbox and drop it into the desired location in the Questionnaire Tree, or place the mouse pointer at the appropriate place in the Questionnaire Tree, right-click and select **Insert After > Confirmit Question Extensions** and select the question type.

   The question designer page opens. In addition to all the “standard” tabs used by the question, the Dynamic Open Text question also has the ...Configuration tab, highlighted in pale green.

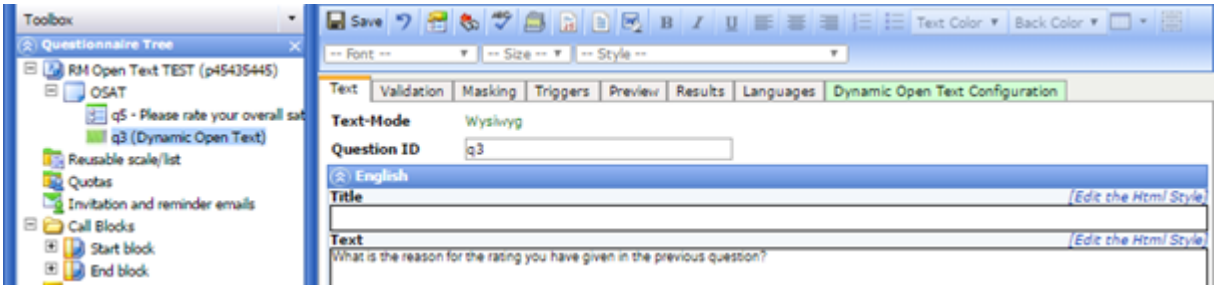


Figure 50 The Dynamic Open Text Configuration tab

2. Set the question id, title, text and other details as required.
3. Click on the Configuration tab to open it (see The Dynamic Open Text Configuration Tab on page 55 for more information).
4. On completion, click **Save** to save the changes.

6.3.2. The Dynamic Open Text Configuration Tab

The Dynamic Open Text Configuration tab holds the properties and fields used to set up the question.

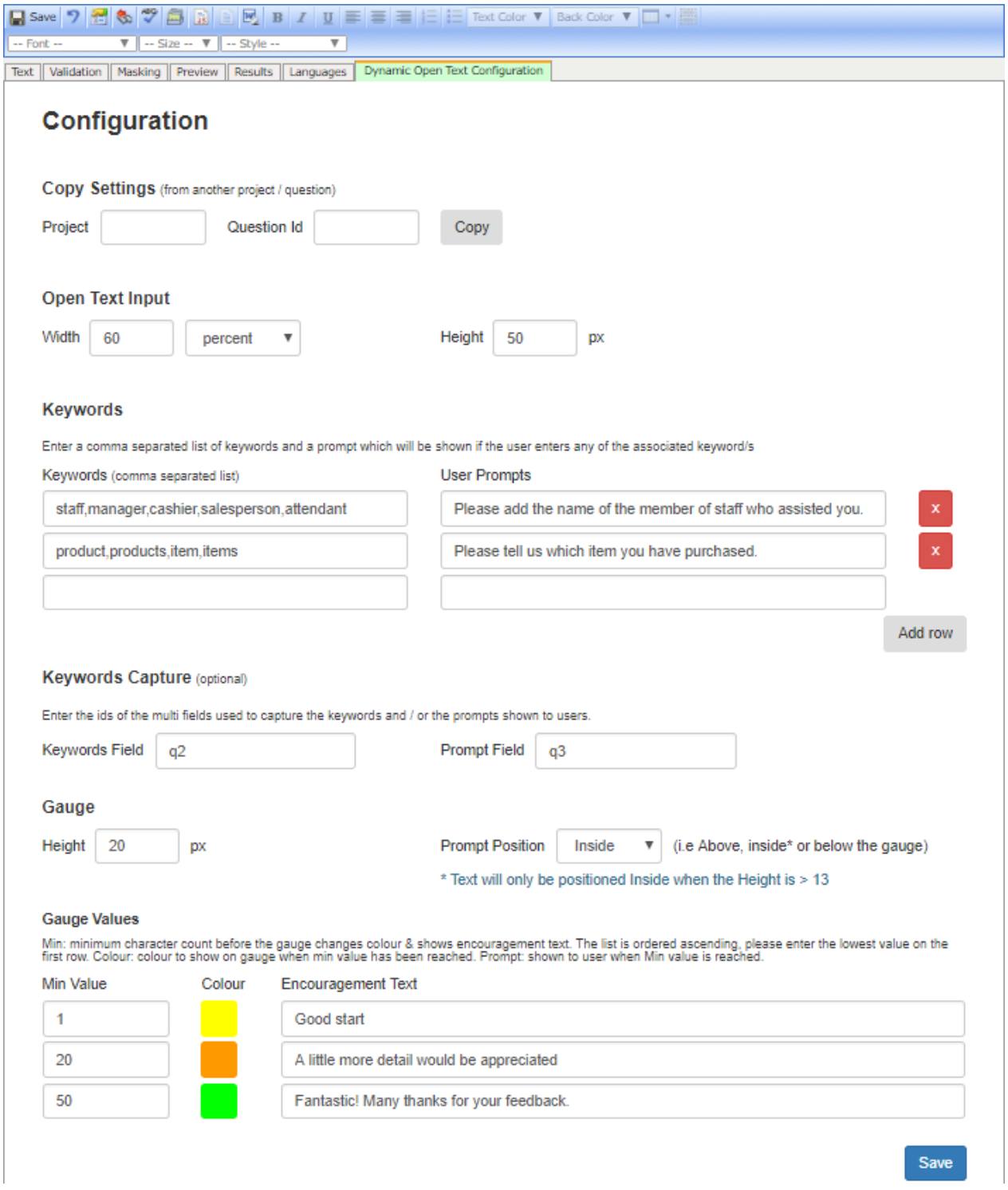


Figure 51 The Dynamic Open Text Configuration tab

- **Copy Settings -** To save you time, you can copy the settings from a Dynamic Open Text question in a different survey. Add the survey id (for example p1234567) and the Question id of the question you wish to copy the settings from into the fields and click **Copy**.

- **Open Text Input -** specify the dimensions of the open text input field - the field into which the respondent will type their answer to your question.
  - **Width -** the width of the field. Type in or select (hover the mouse pointer over the field to show the up/down arrow buttons) the desired numerical value and select the units you wish to use from the dropdown list.
  - **Height -** the height of the field. Type in or select (hover the mouse pointer over the field to show the up/down arrow buttons) the desired numerical value in pixels (px).
- **Keywords -** here you add the keywords that will elicit a prompt, and the prompt you wish to present in the event the respondent types a keyword into the field. Click **Add row** to add a new row to the list. Click the **X** button (this appears only after the changes have been saved) for a row to delete it. Note that the user prompts will be presented to the respondent below the open text input field.
  - **Keywords -** write or copy in a comma-separated list of the words you wish to look for. For example, **staff,manager,cashier,salesperson,attendant**. Note that if you use the Keywords Capture functionality then these same keywords must be used as the answer options in the keywords multi (see Keywords Capture on page 58 for more information).
  - **User Prompts -** type into the field the text you wish to present to the respondent in the event he/she includes one of the associated keywords in their response. For example, **Please state the name of the member of staff who assisted you**. Note that if you use the Keywords Capture functionality then these same prompts must be used as the answer options in the prompts multi (see Keywords Capture on page 58 for more information).
- **Keywords Capture -** This functionality is optional, and allows you to capture the keywords a user may have typed and the prompts that are shown to them. Either or both can be captured (see Keywords Capture on page 58 for more information).
  - **Keywords field -** type into the field the question id of the multi question that is to be used to capture the keywords used by the respondent.
  - **Prompt field -** type into the field the question id of the multi question that is to be used to capture the prompts that are shown to the respondent.
- **Gauge -** specify the height of the encouragement gauge, and where you want the prompt text to appear relative to the gauge.
  - **Height -** the height of the gauge in pixels. Note that if you want the prompt text to appear inside the gauge then the gauge height must be minimum 14 pixels.
  - **Prompt Position -** select where you want the prompt text to appear. If the gauge is not high enough to accommodate the prompt text (see above) then the text will be presented above the gauge.
- **Gauge Values -** these are the settings for the colored gauge, and the encouragement texts that are displayed as the respondent adds text to the open text field.
  - **Min Value -** type in or select a value (hover the mouse pointer over the field to show the up/down arrow buttons). Once the respondent has typed this number of characters into the open text field, the gauge will change to the selected color starting at the left end, and the associated prompt text will appear.
  - **Color -** click in the colored square to open a selection box. Here you can select a "standard" color, or you can type the Hex value for any color into the field. The three colors will merge into each other, so you should consider using colors that will complement rather than clash. If a single solid color is desired, set all the boxes to the same color.
  - **Encouragement Text -** type into the fields the text you wish to display to encourage the respondent to provide more information and maybe thank them for their efforts. The message and color will change as the number of characters the respondent types in exceeds the Min Value setting.

When you have completed the setup, click **Save** in the lower-right corner of the tab to save the changes.

When the respondent types his/her response into the open text field, the gauge will fill with color and the encouragement messages will appear as the appropriate number of characters are added. User prompts will appear below the text field if the respondent includes any of the keywords.

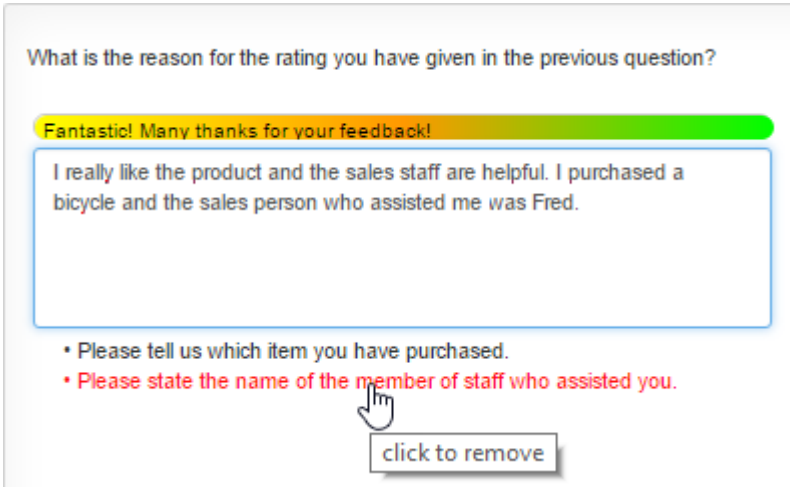


Figure 52 Example of what the respondent will see as they input their response, based on the settings in the first figure

Note. The respondent can click on a prompt message and close it. If they then change their text, for example they delete the text and rewrite it, the prompt message will not reappear even if the appropriate keywords are used.

6.3.3. Keywords Capture

The use of this functionality is optional.

This allows you to capture the keywords a user may have typed, and the prompts that are shown to them, even if the respondent later changes their answer. Either or both can be captured.

To achieve this, you must add multi questions to the same page as the Dynamic Open Text (DOT) question, and configure the keywords and / or prompts you would like to capture as "answer options" in the multis. Note that the multi questions defining the keywords and prompts to be captured must appear on the same page in the questionnaire tree, located before the DOT question.

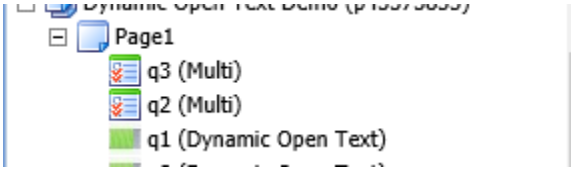


Figure 53 The multi questions on the same page as and before the DOT question

The Keywords Capture fields on the Configuration page are as follows.

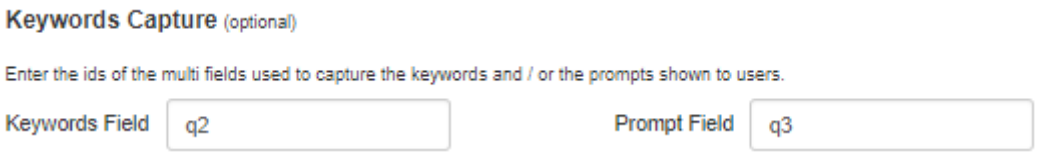


Figure 54 The Keywords Capture fields

- **Keywords field -** type into the field the question id of the multi question that is to be used to capture the keywords used by the respondent.

- **Prompt field -** type into the field the question id of the multi question that is to be used to capture the prompts that are shown to the respondent.

Set up the multis as "normal" questions, without text or instructions, and using as the answer options the keywords and prompts you have specified in the DOT question.

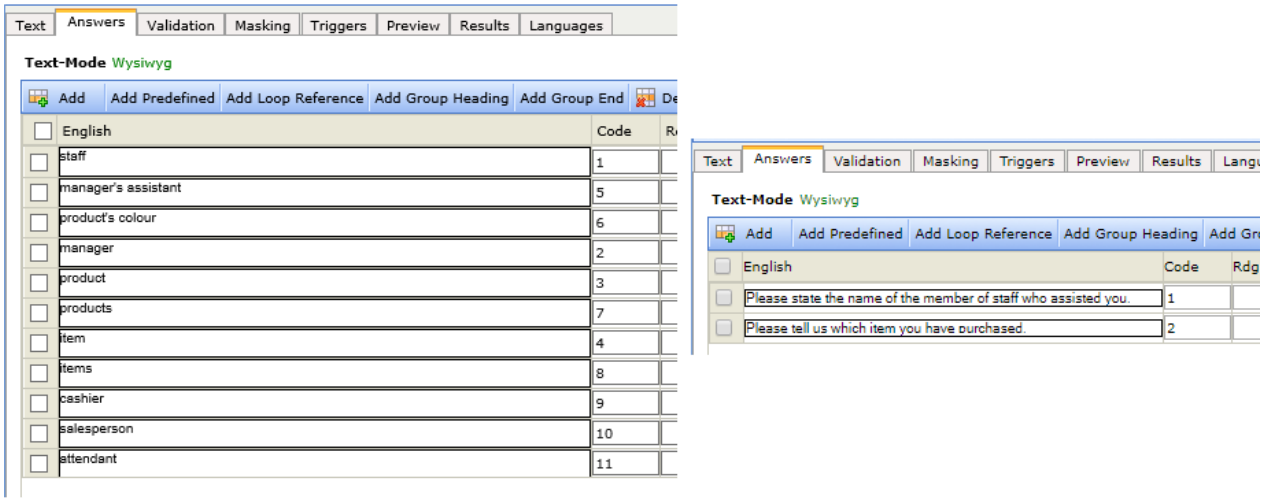


Figure 55 The keywords and prompts from the DOT question input as the answer options in the multis

The Flex extension will ensure the multis are hidden from the respondent, and will register all instances of the keywords that the respondent uses, even if the respondent later changes their answer.

7. Video Rating - Introduction

This extension provides the functionality that allows you to create and present video-rating questions to your respondents. This question type will show a video clip to the respondent, and pause the video at preset points to allow the respondent to rate the video at those points. This allows you to gather the respondents' moment-by-moment impressions and opinions of for example an advertisement intended for presentation on television.

The Video Rating question comes in two types depending on your requirements: the Video Rating Question allows you to set the numeric values you can set the "Answers" to, and the Video Rating Question with Scale allows you to set either text values, or even pictures that the "Answers" can be set to.

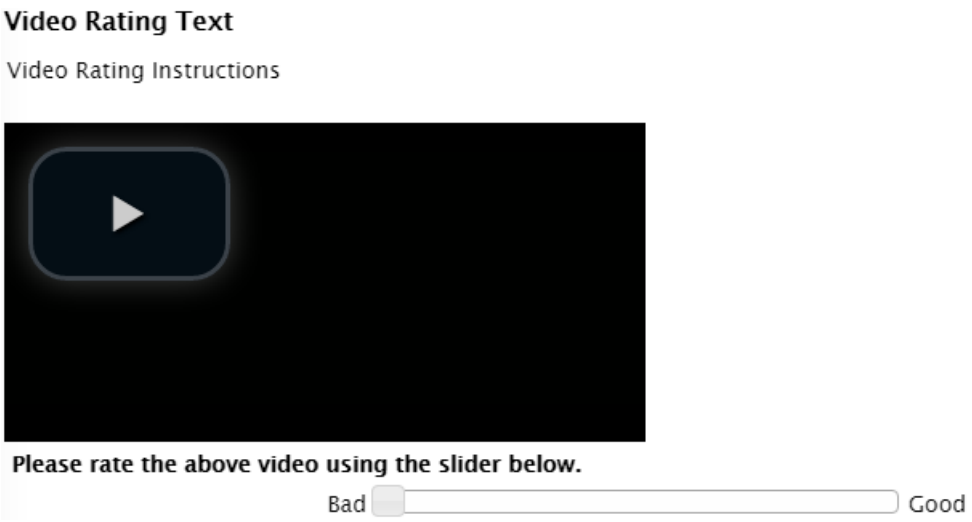


Figure 56 Example of a video rating question in a survey

Note: All major browsers support the Video question type, including IE10+, Chrome, Safari, Mozilla Firefox, and Opera.

7.1. How to Use the Video Question Types

When Confirmit Question Extensions is activated for your company, the Confirmit Question Extensions toolbox appears in the toolbox pane.

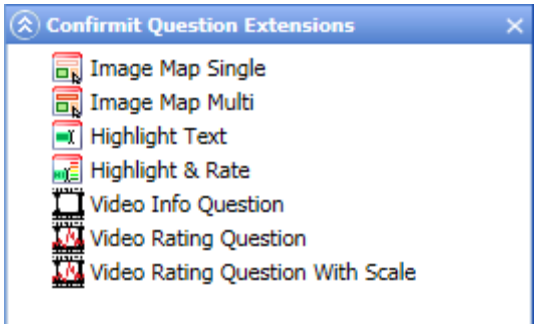


Figure 57 The Video Questions toolbox

To add a Video Question to your survey, drag and drop the appropriate question type into the desired location in the Questionnaire Tree, or place the mouse pointer at the appropriate place in the Questionnaire tree, right-click and select **Insert After > Confirmit Question Extensions** and select the desired question type. The question designer page opens. In addition to all the "standard" tabs used by the question, the Video Question also has the Configuration Tab highlighted in pale green.

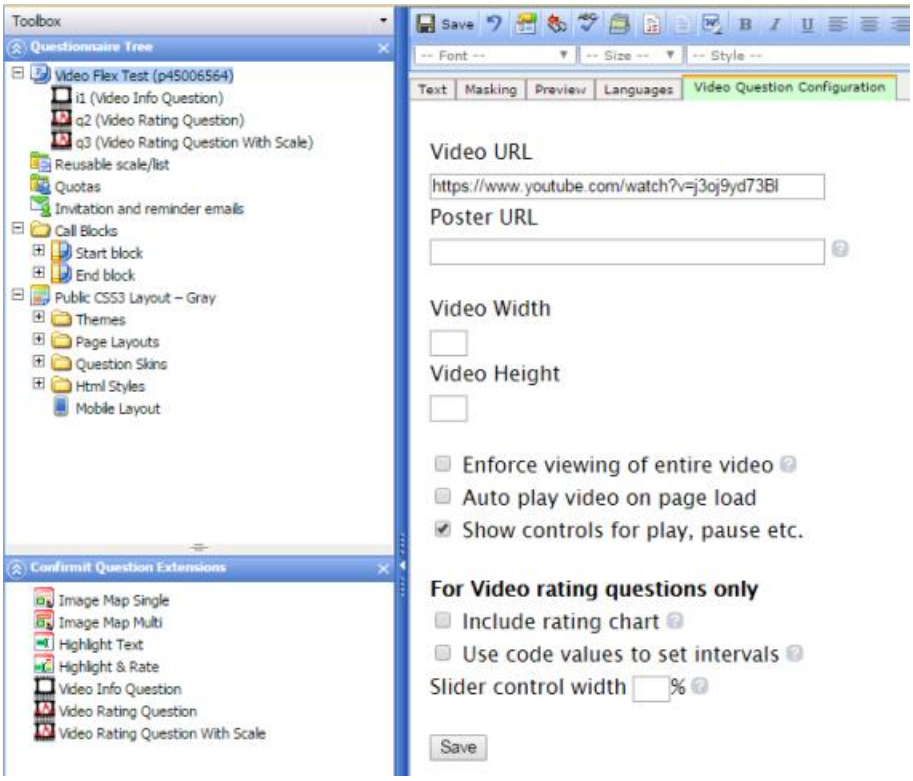


Figure 58 A video question in a survey

7.2. The Video Info Question

This type of question allows the respondent to view an embedded video.

7.2.1. How to Set Up a Video Info Question

To set up a Video Info question:

1. Type the title, text, and instructions into the Text Tab.
2. Go to the pale green Video Question Configuration tab.

   The configuration page for the question opens.

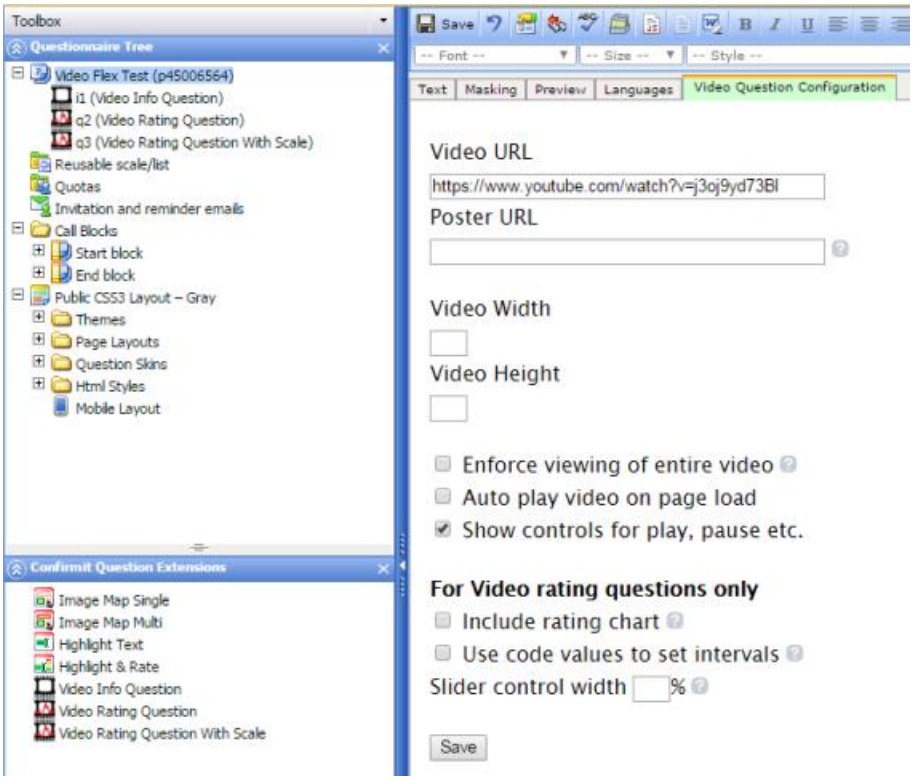


Figure 59 The configuration page for the question

3. Type/copy the URL of the video you want embedded into your question into the Video URL text box.

   Valid video formats are:

   - Mp4
   - YouTube - see Note below.
   - Webm
   - Ogv

Note: When using YouTube videos, having more than one Video Question on a survey page causes issues. Confirmit therefore recommends separating YouTube videos onto separate pages.

4. Set the Poster URL, Video Width, Video Height, and check boxes as needed (see The Video Question Configuration Tab on page 67 for more information).

Note: You can ignore the options in the "For Video rating questions only" section as the Video Info question does not allow ratings.

5. Click **Save**.
6. Launch the survey to save your changes in production.

To Preview the question, go to the Preview tab.

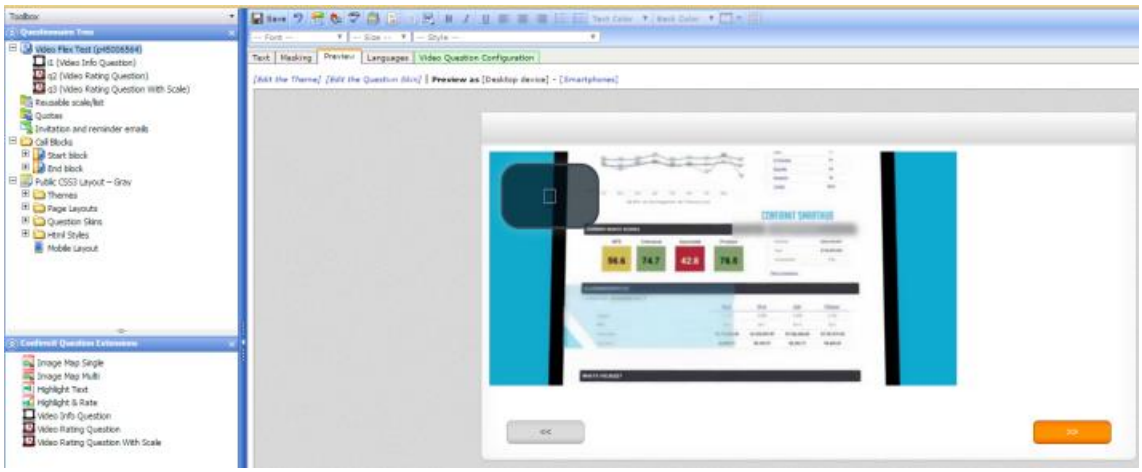


Figure 60 Previewing the video question

7.3. The Video Rating Question

This type of question allows the respondent to view an embedded video and put numeric values on the ends of the rating slider.

7.3.1. How to Set Up a Video Rating Question

To set up a Video Rating question:

1. Type the title, text, and instructions into the Text Tab.
2. Add the required number of answer options into the Answers tab
3. If you want the respondent to rate the videos at particular times, put the times you want the video rated at, in seconds, into the “Code” column for the answers. Then ensure you check the “Use code values” box in the Configuration tab in step 5 of this procedure.

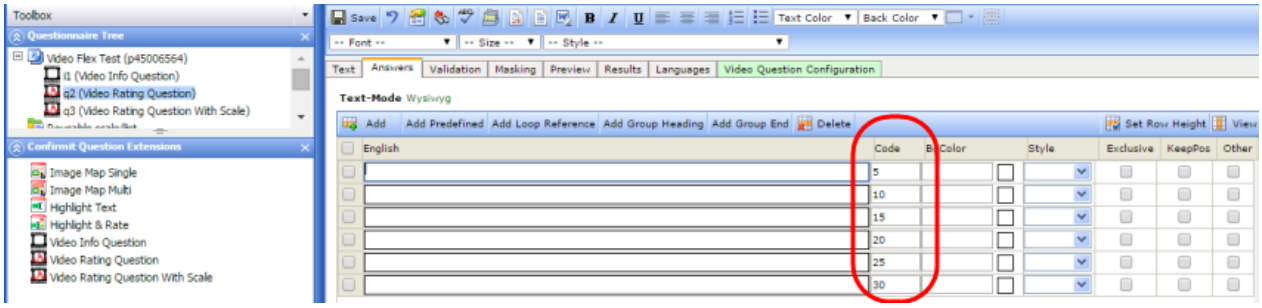


Figure 61 Creating the answers and setting the codes for a video rating question

4. To specify the maximum and minimum values the respondents can set the “Answers” to, right-click on the video rating question in the Questionnaire Tree and choose **Properties** then in the Properties panel, set the minimum and maximum values.

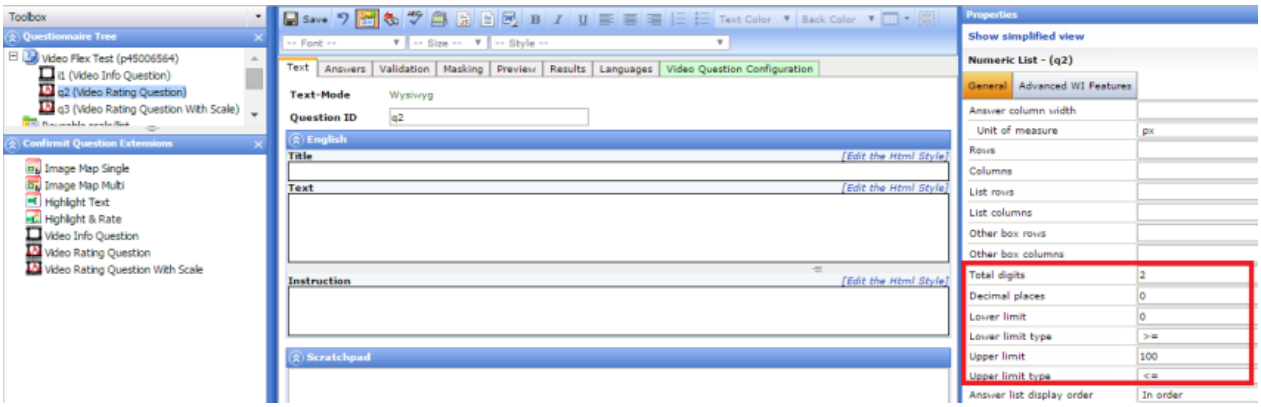


Figure 62 Setting the maximum and minimum answer values

The default value for the lower limit is 0, the default for the upper limit is 100.

5. Go to the pale green Video Question Configuration tab.

   The configuration page for the question opens.

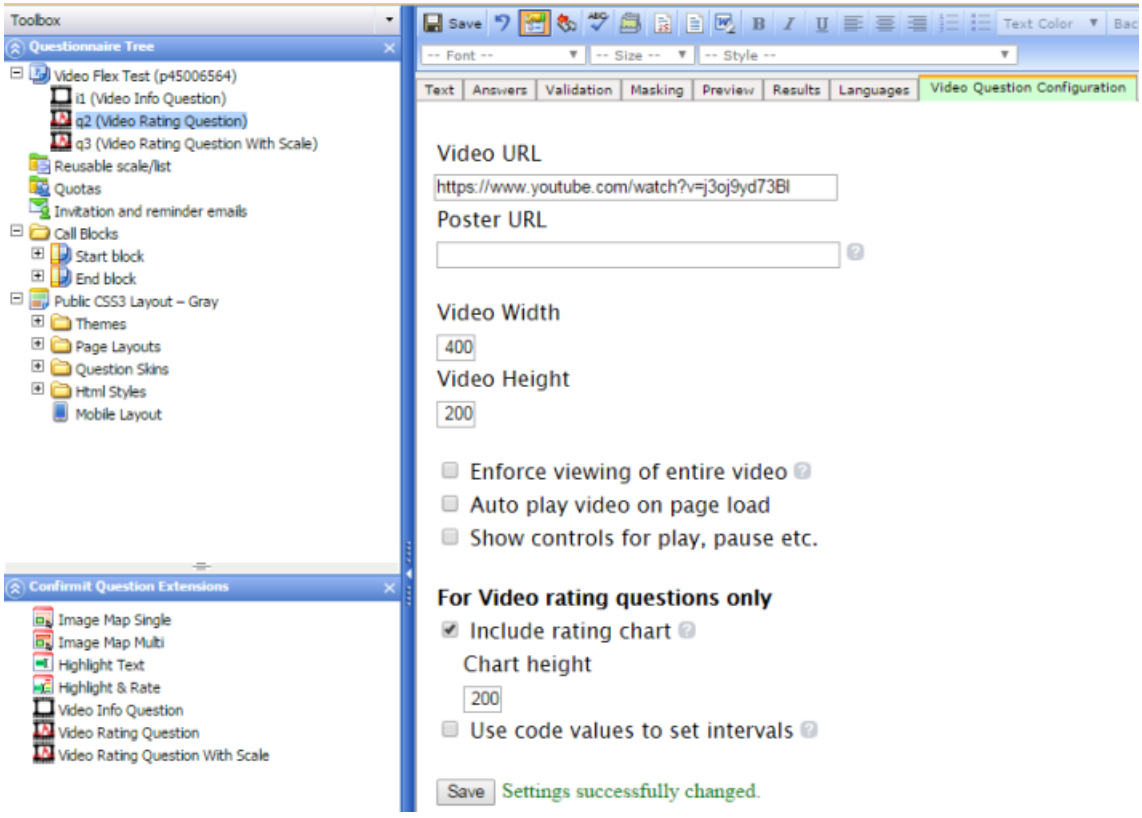


Figure 63 The configuration page for the question

Important
If you include the rating chart for videos longer than 15 minutes, this can cause problems in the survey. You are therefore advised to keep videos as short as possible.

6. Type/copy the URL of the video you want embedded into your question into the Video URL text box.

   Valid video formats are:

   - Mp4
   - YouTube - see Note below.
   - Webm
   - Ogv

Note: When using YouTube videos, having more than one Video Question on a survey page causes issues. Confirmit therefore recommends separating YouTube videos onto separate pages.

7. Set the Poster URL, Video Width, Video Height, and other settings as required (see The Video Question Configuration Tab on page 67 for more information).
8. Click **Save**.
9. Launch the survey to save your changes in production.

To Preview the question, go to the question's Preview tab.

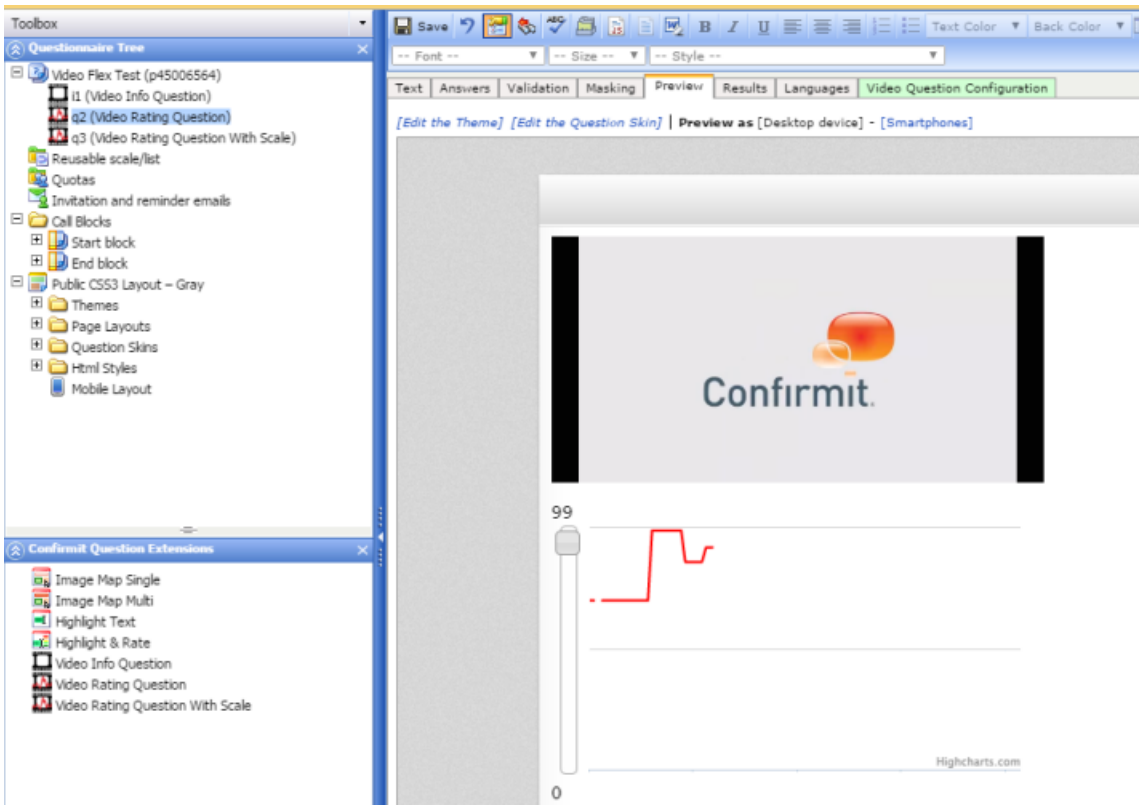


Figure 64 Previewing the video question

7.4. The Video Rating Question with Scale

This type of question allows the respondent to view an embedded video and put text values or images on the ends of the rating slider.

7.4.1. How to Set Up a Video Rating Question with Scale

To set up a Video Rating question with Scale:

1. Type the title, text, and instructions into the Text Tab.
2. Add the required number of answer options into the Answers tab
3. If you want the respondent to rate the videos at particular times, put the times you want the video rated at, in seconds, into the “Code” column for the answers. Then ensure you check the “Use code values” box in the Configuration tab in step 6 of this procedure.

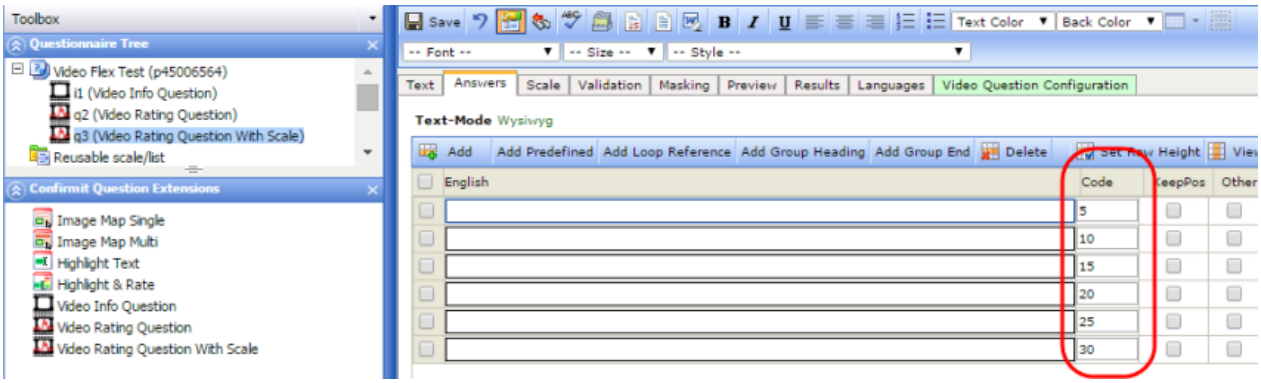


Figure 65 Creating the answers and setting the codes for a video rating question

4. Add the appropriate values to the Scale tab.

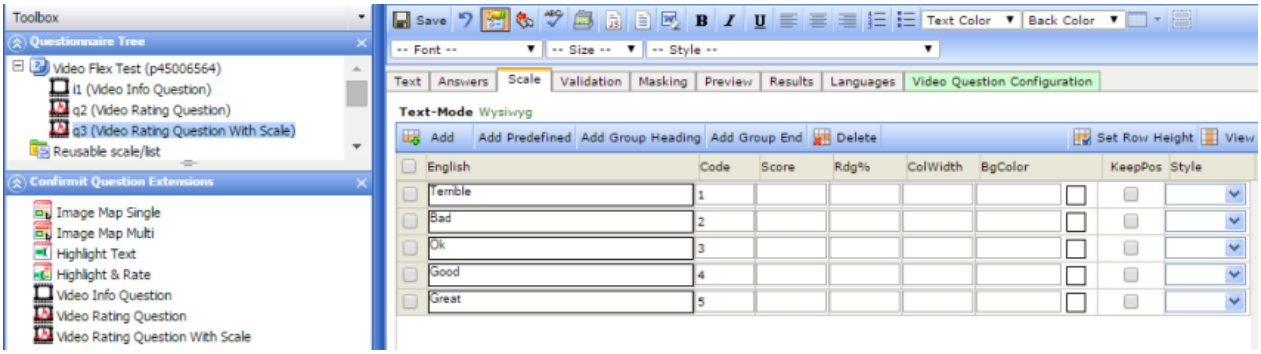


Figure 66 Adding the required values to the Scale tab

5. To set the Scales to images, open the Properties panel for the question, select **Advanced WI Features**, then check the Use images checkbox.

Note: When using images, only the first and last Default images are used on the slider, and the images are automatically sized so you do not need to set the image width or image height.

Note: When using texts, only the first and last text strings are displayed on the scale, the first value in the scale being the lowest value and the last value in the scale being the highest value.

The display priority order for the slider is by default:

- If images are enabled and there is an image in the first or last value, the images will be shown.
- If there is a text string in the first or last value, the text will be shown.
- If images or text are not provided, the code for the first and last values will be shown.

6. Click on the pale green Video Question Configuration tab.

   The configuration page for the question opens.

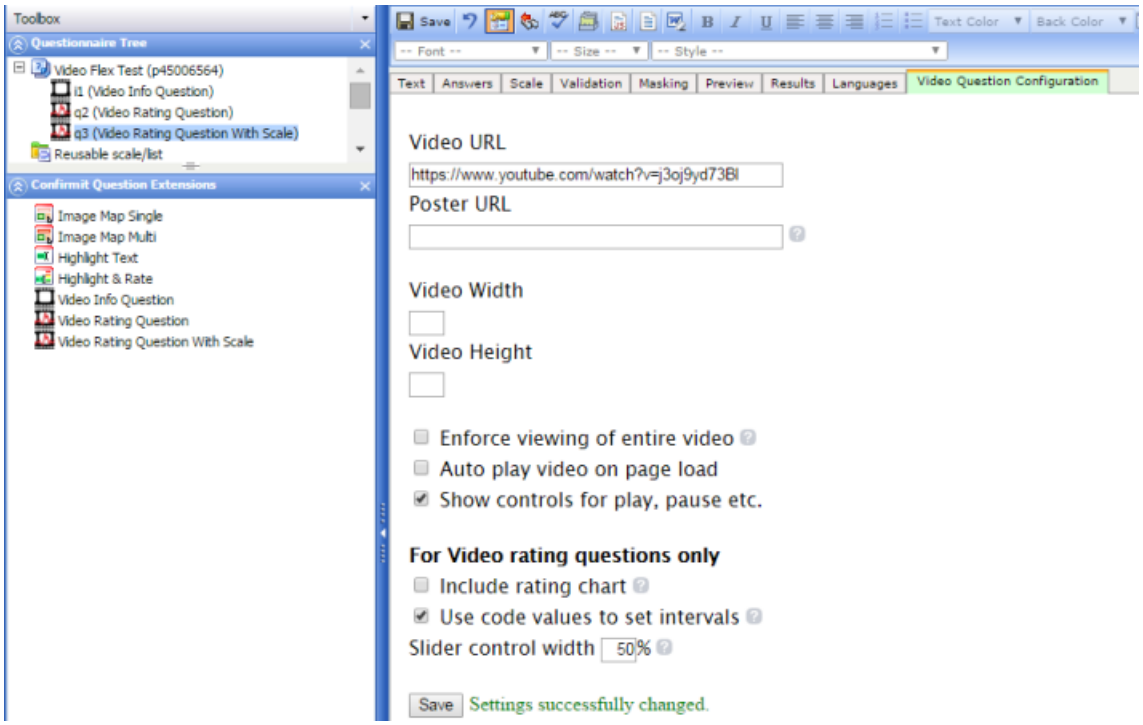


Figure 67 The configuration page for the question

7. Type/copy the URL of the video you want embedded into your question into the Video URL text box.

   Valid video formats are:

   - Mp4
   - YouTube - see Note below.
   - Webm
   - Ogv

Note: When using YouTube videos, having more than one Video Question on a survey page causes issues. Confirmit therefore recommends separating YouTube videos onto separate pages.

8. Set the Poster URL, Video Width, Video Height and other settings as needed (see The Video Question Configuration Tab on page 67 for more information).
9. Click **Save**.
10. Launch the survey to save your changes in production.

7.5. The Video Question Configuration Tab

Note: Changes to the configuration settings will not be implemented until the changes have been saved and the survey has been launched.

The configuration properties in Video Question Configuration tab allow you to specify Video, Chart, and controls settings. The properties are as follows:

- **Video URL –** The URL of the video to be displayed to the respondent. Valid video formats are:
  - Mp4
  - YouTube

- Webm
- Ogv

Note: When using YouTube videos, having more than one Video Question on a survey page causes issues. Confirmit therefore recommends separating YouTube videos onto separate pages.

- **Poster URL –** the URL of the Poster that covers the video display area before the respondent starts playing the video.
- **Video Width –** the width in pixels of the video being displayed for the respondent. If you choose to display the chart, this value will also determine the width of the chart.
- **Video Height –** the height in pixels of the video being displayed for the respondent.
- **Enforce viewing –** check to disable the survey's **Forward** and **Back** buttons until the video has been fully played. If a page contains multiple videos that have "Enforce viewing..." checked, then the survey's **Forward** and **Back** buttons will be disabled until all videos that are "enforced" have been played.
- **Auto Play –** the video will be played automatically as soon as it has loaded.
- **Show Controls –** check to show the controls for the video (e.g. "Play", "Pause" etc.). Note that if you elect to hide the controls they will remain visible to the viewer until the video starts playing, whether this is because it is set to auto play or because the viewer has clicked the **Play** button.

For Video Rating Questions only:

- **Include Chart –** check to display a chart that shows the respondent how the video is being rated as it plays.

Important
If you include the rating chart for videos longer than 15 minutes, this can cause problems in the survey. You are therefore advised to keep videos as short as possible when using the chart.

- **Chart Height –** only appears when Include Chart is checked. Chart height is the height of the chart in pixels. As stated above, the Video width will determine the width of the chart should you chose to display it.
- **Use Code Values –** check to use the Code values from the Answers tab to set the times when the video is to be rated. When this option is not checked, the video is rated based on the length of the video and the number of Answers in the Answers tab.
- **Slider control width –** only appears when "Include chart" is not checked. Slider control width is the width of the slider control as a percentage of the width of the survey page on the screen. Valid values are 10 to 100.

8. Language Translator

The Language Translator extension provides automatic machine translation of survey responses. Add a call to the translation service into the validation tab of open text questions to provide on-the-fly translation, which is then saved to a selected variable (possibly hidden) for later use; for example to assist human translators or for use in Text Analytics. Alternatively you can set up a data processing task to translate the responses for completed surveys. You can also set up the system to send notification emails in the event the translation system encounters an error.

8.1. Setting Up Language Translator

When the Language Translator extension is activated for a survey (see How to Activate and Deactivate an Extension on page 3 for more information), a tab is displayed on the Survey Management > Overview page.

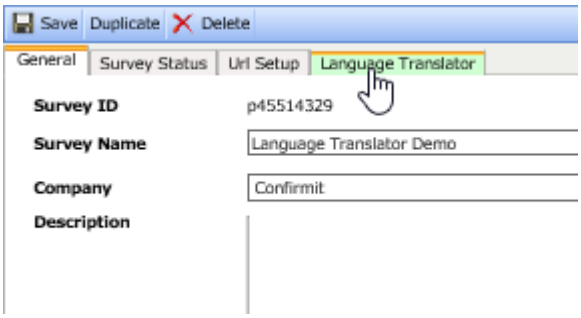


Figure 68 The Language Translator extension tab

Click on this tab to open the Configuration page.

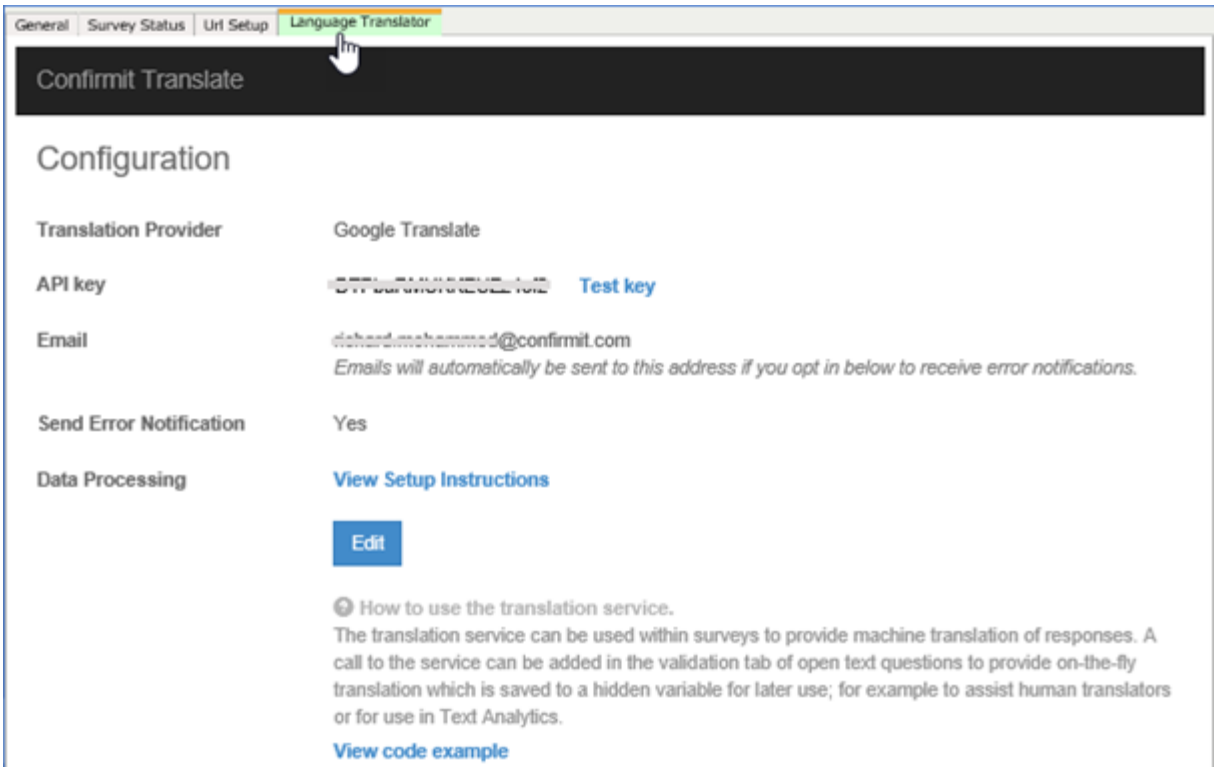


Figure 69 The Configuration page

Here are displayed the current system settings, and some instruction text to provide some information about the extension.

- Click **Test key** to test your translation setup (see Testing the API Key on page 70 for more information).
- Click **View Setup Instructions** to open a page of information regarding running data processing scripts to translate responses after the survey is completed (see Data Processing on page 71 for more information).
- Click **Edit** to set or change the system settings (see Configuration Edit on page 73 for more information).
- Click **View code example** to see an example of the code you can add to the question(s) to call the translation service (see Setting Up the Questions on page 73 for more information).

8.1.1. Testing the API Key

On the Configuration page, click **Test key** to open a field where you can input some text to test your translation setup.

Type some text into the upper field and click **Translate** to get a translation of your text into the target language in the lower field. Note that the source (if specified) and target languages are stated for the respective fields. In this case the source language is not specified so the translation provider will detect which language is being written, and the target language is specified as English.

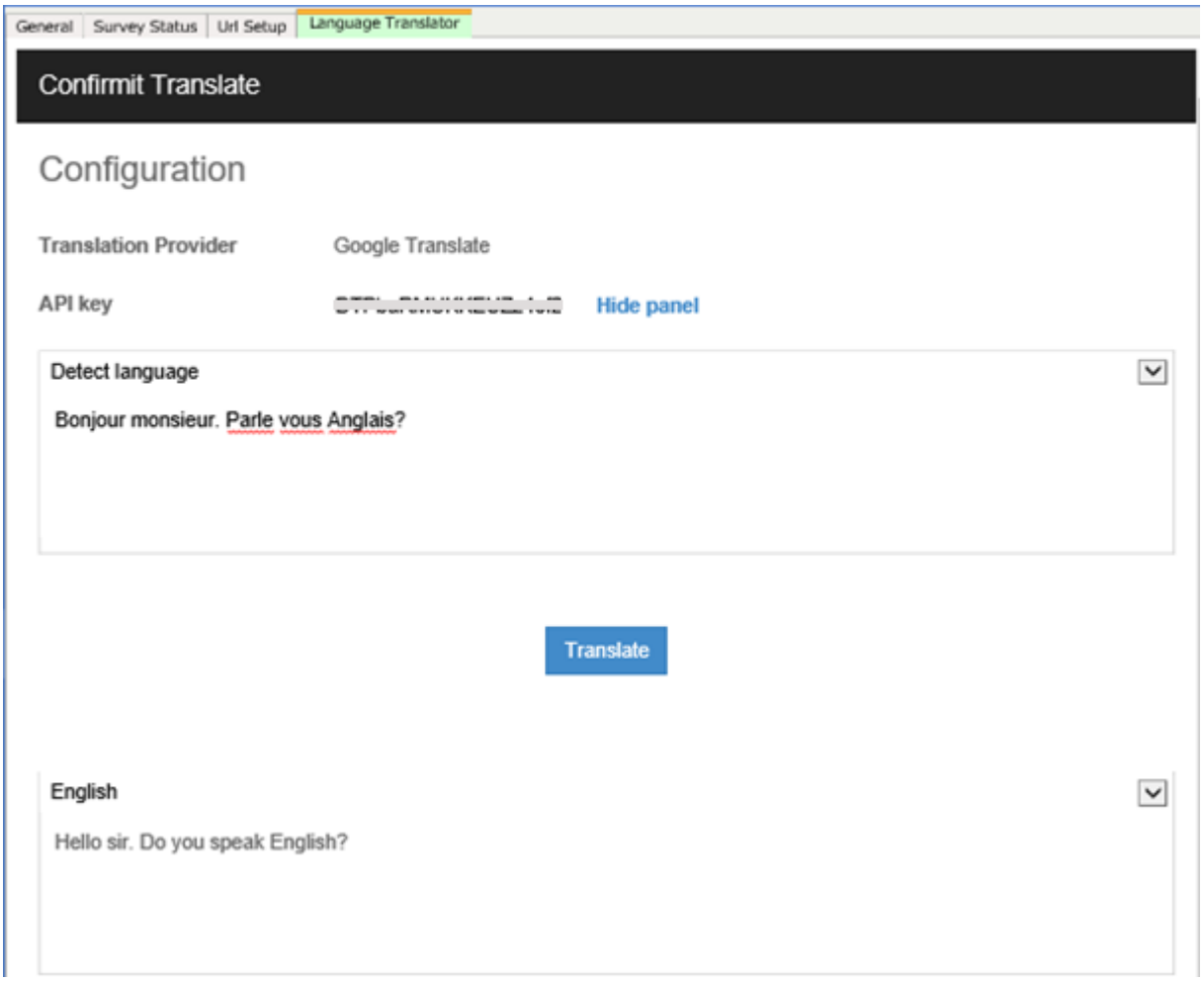


Figure 70 Testing the API

8.1.2. Data Processing

You can also set up the system to run a data processing task for language translation after the survey is completed by the respondent. On the Configuration page click **View Setup Information** to see information for setting up the DP task.

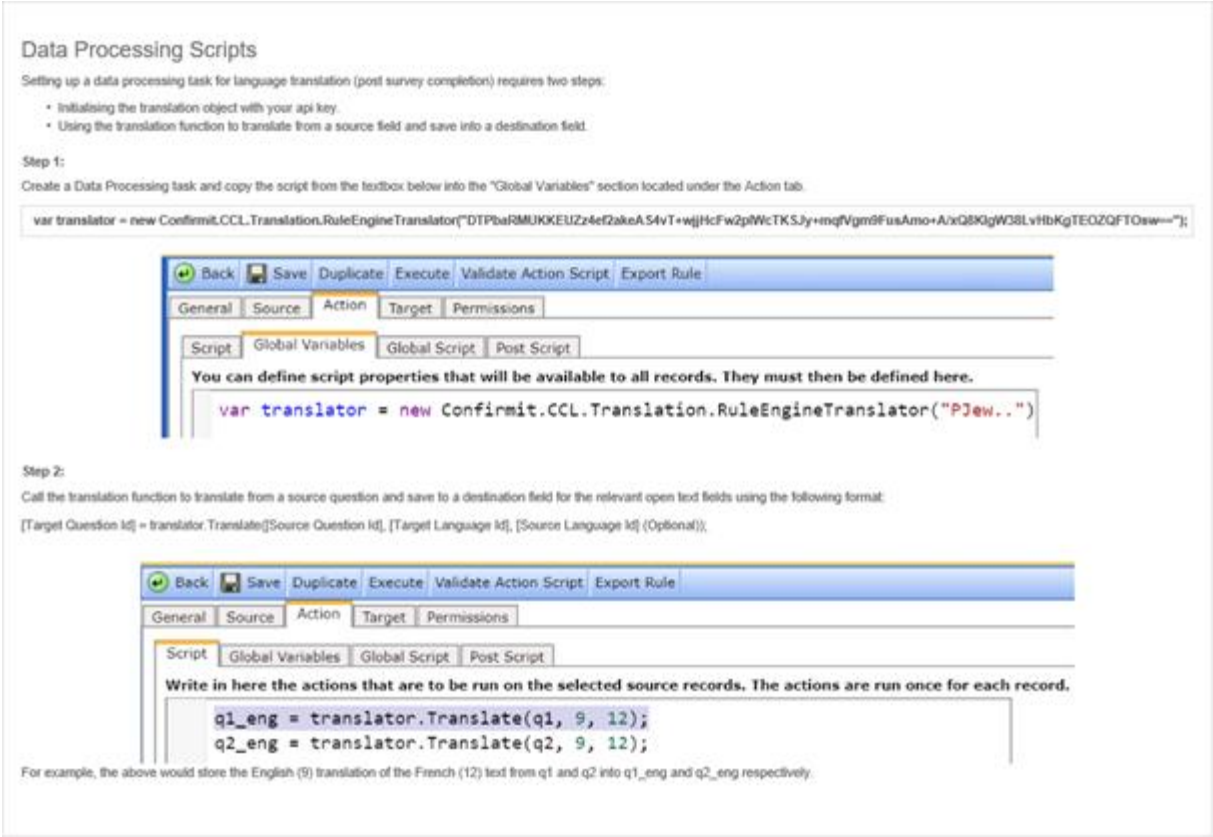
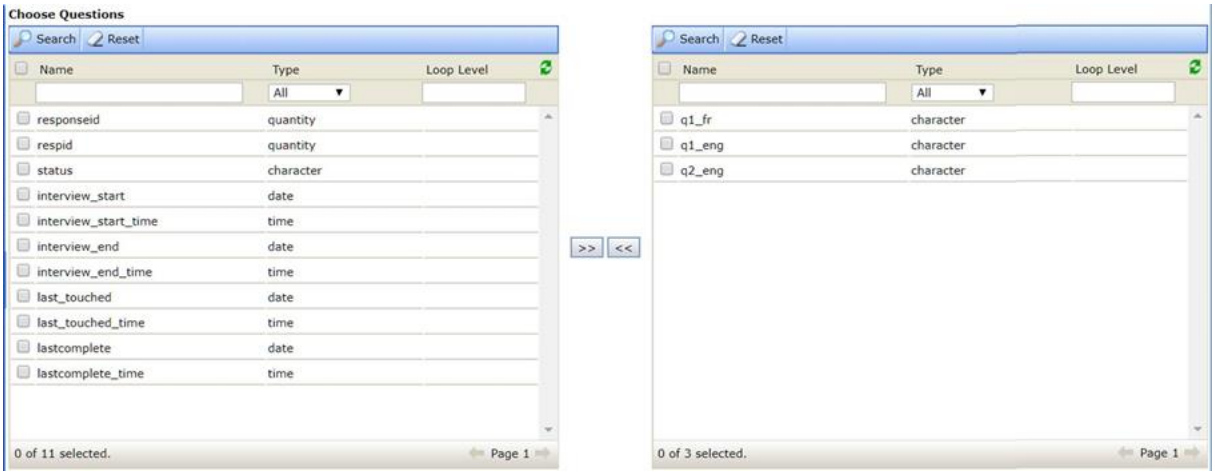


Figure 71 The Data Processing Setup information page

Refer also to the separate Confirmit Horizons Data Processing User Guide for detailed instructions. Specific settings required for the rule are as follows:

- The Source and Target Types must be Survey Database.
- The source and target columns which will be used in the translation must be selected in order to make them available as variables for the scripts.



8.1.3. Configuration Edit

When on the Configuration page, click **Edit** to open the editing page. Here you can set the various parameters for the extension.

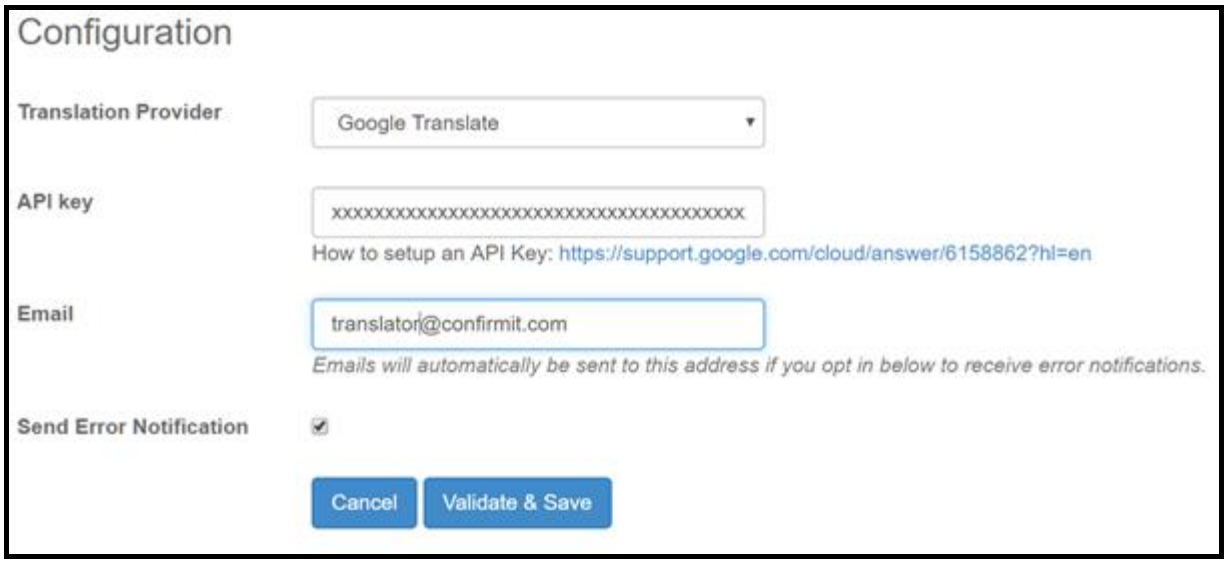


Figure 72 The Configuration Edit page

- **Translation provider -** select the service you wish to use to perform the translation.
- **API key -** the API key is used for authenticating to the Google or Microsoft translation service. For Google it is referred as an "API key" while MS uses an "Authentication Key".
- **Email -** type in the email address you wish notification emails to be sent to.
- **Send error notification -** if you want emails to be sent in the event of an issue with the translation, check the box. This is optional.

8.2. Setting Up the Questions

For each open text question that you want to translate the responses for, you need to add an open text variable in which the translated responses are to be stored.

The example below shows two open text questions which will be presented to (in this case) French respondents, **q1_fr** and **q2_fr**. The responses to these questions will be translated to English and put into the hidden variables **q1_eng** and **q2_eng** respectively. In this example the hidden variables have been put into a Translations folder to keep the Questionnaire Tree tidy.

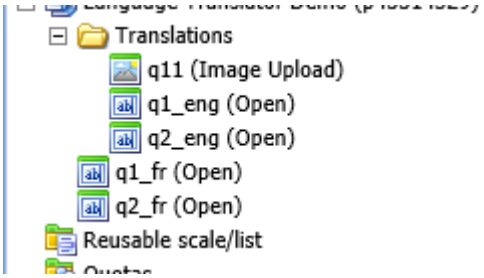


Figure 73 Example of survey questions

Each open text question (**q1_fr** and **q2_fr**) will have "normal" title, text and instructions in the selected survey language, and script in the Validation tab to call the translation engine and specify the required language.

The call to the translator function uses the format:

```
SurveyTranslator.Translate([Target Question Id], [Target Language Id],
[Source Question Id] (Optional), [Source Language Id] (Optional))
```

In the validation tab of the open text question it can thus be called as:

```
SurveyTranslator.Translate("q1_eng", 9);
```

where "q1_eng" is the target hidden variable and 9 is the target language id (in this case English).

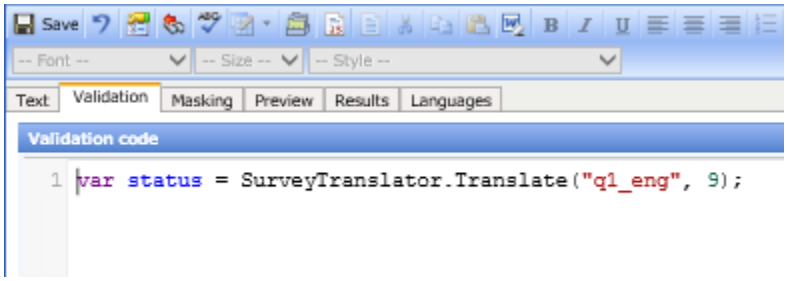


Figure 74 Example of the script in use

The function can also be called by explicitly stating the source question id and source language as shown below:

```
SurveyTranslator.Translate("q2_eng", 9, "q2_fr", 12);
```

Note: If you specify both the source and target languages, then the extension will only be able to translate from the specified source language. If you only specify the target language then the extension will translate any language it recognizes into the target language.

8.3. Custom Error Handling

You can read the translation status via the status object which is returned by the call to SurveyTranslator, Translate() as shown below. The status object has two properties; “Status” and “Message”. In the event of a successful translation the Status is set to “Success” and Message will be empty. For Failures the Status will be “Failure” and the Message will contain details of the error.

Below is an example of the code you can add to the Validation tab for the question to send a custom email to the person responsible for your Microsoft Translate account:

```
var status = SurveyTranslator.Translate("q1_eng", 9);
if(status != null){
 if(status.Status == "Failure"){
 SendMail("no-reply-
TranslationDemo@confirmit.com","your.email@address","Translation Error",
 "<The text of the email>");
 }
}
```

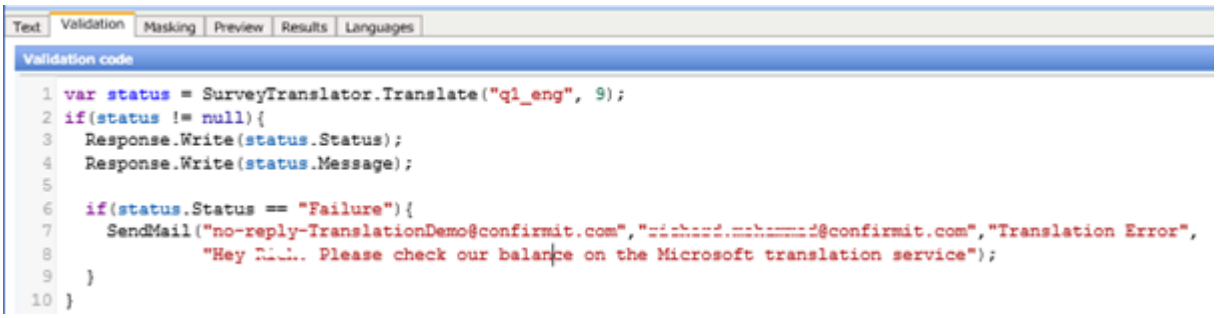


Figure 75 Example of the code added to the Verification tab

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