



## **CONFIRMIT FLEX EXTENSION USER GUIDE**

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

**The information herein describes Confirmit Flex and its features as of November 2010. New features may be introduced into Confirmit Flex after this date. Go to [www.confirmit.com](http://www.confirmit.com) or check “News” on the Customer Extranet for the latest updates.**

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## What's New in this Issue?

Some text has been added or updated in this version of the Confirmit Flex User Guide to reflect changes in the functionality. Specific changes are described in the following sections:

- The SMS Provider Details section is edited (see the SMS Provider Details section on page 22 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](mailto: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 Flex is the product name given to Confirmit's 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 iPhone, Geolocation, Email Opt-Out and SMS Surveys extensions are Add-Ons that are currently offered to On-Demand users only. Commercial terms will apply. These extensions are not subject to the overall Confirmit SLA.

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 iPhone and SMS Surveys extensions only create an alternative survey rendering, and will not store any data.

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

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.

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 **Project 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 project or panel; you can specify different setups for the same extension for any number of surveys.

The extension programs currently available within Confirmit 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, project and/or panel administrator to add email addresses to blacklists such that particular respondents do not receive project emails, and allows respondents to opt out of receiving emails for particular projects, panels or companies (see the Email Opt-out - Introduction section on page 5 for more information).
- **Geolocation** - allows the user to block or flag respondents suspected of providing fraudulent response data. Various methods and "degrees" of detection are available (see the Geolocation - Introduction section on page 10 for more information).
- **iPhone Surveys** - adapts the survey layout such that the survey is suitable for display on an iPhone (see the iPhone Surveys section on page 18 for more information).

- **SMS Surveys** - enables respondents to receive and reply to surveys using the SMS functionality on their mobile telephones (see the SMS Surveys - Introduction section on page 19 for more information).

## 2. The Project Management > Extensions Menu

When you have opened a project, the **Project Management** menu includes the **Extensions** sub-menu. Go to this sub-menu to open the Project 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.

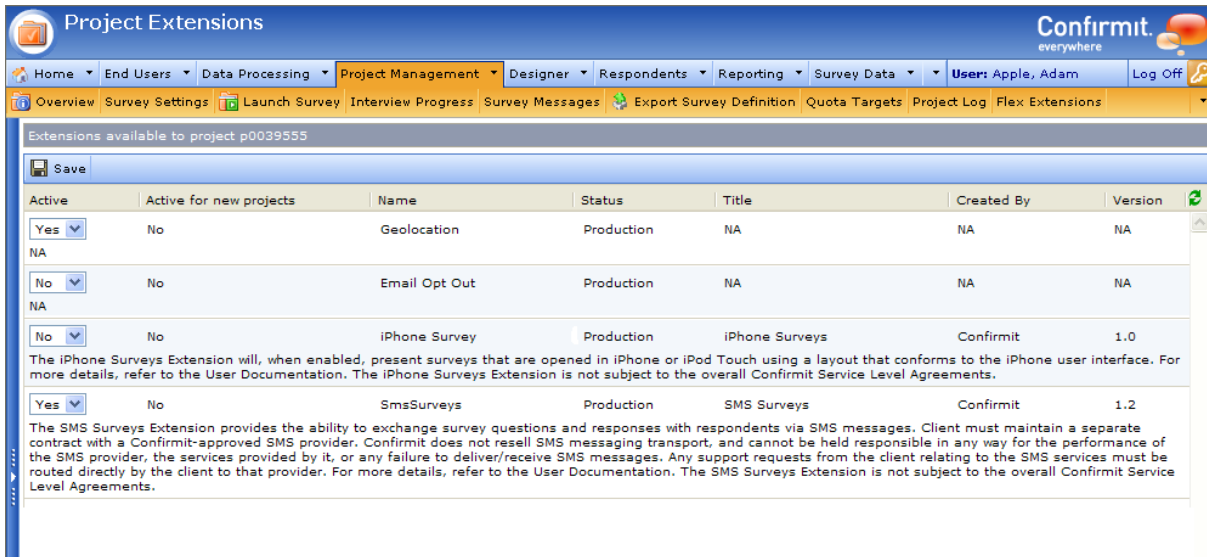


Figure 1 Example of the Project Extensions page with available extensions listed

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 the How to Activate and Deactivate an Extension section 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 project:

1. Open the project and go to the **Project Management > Flex Extensions** menu command.  
The Project Extensions page opens, listing all the extensions that are available to you.
2. Find the extension you wish to activate for the current project.
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 project:

1. Open the project and go to the **Project Management > Flex Extensions** menu command.  
The Project Extensions page opens, listing all the extensions that are available to you.
2. Find the extension you wish to deactivate for the current project (all extensions that are active for the project 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 that is currently offered to On-Demand users only. Commercial terms will apply. This extension is not subject to the overall Confirmit SLA.**

The Email Opt-out extension allows the company, project 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 project/panel administrators to include "Opt-out" links in emails to respondents, thereby allowing respondents to opt out of receiving emails for particular projects, 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.

If for example the user has added a list of 100 email addresses to a project, and five of those addresses appear in the project 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 **Project 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 Project Overview page.

If the Overview page is for a project, then the tab contains a Company Blacklist and a Project Blacklist 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.

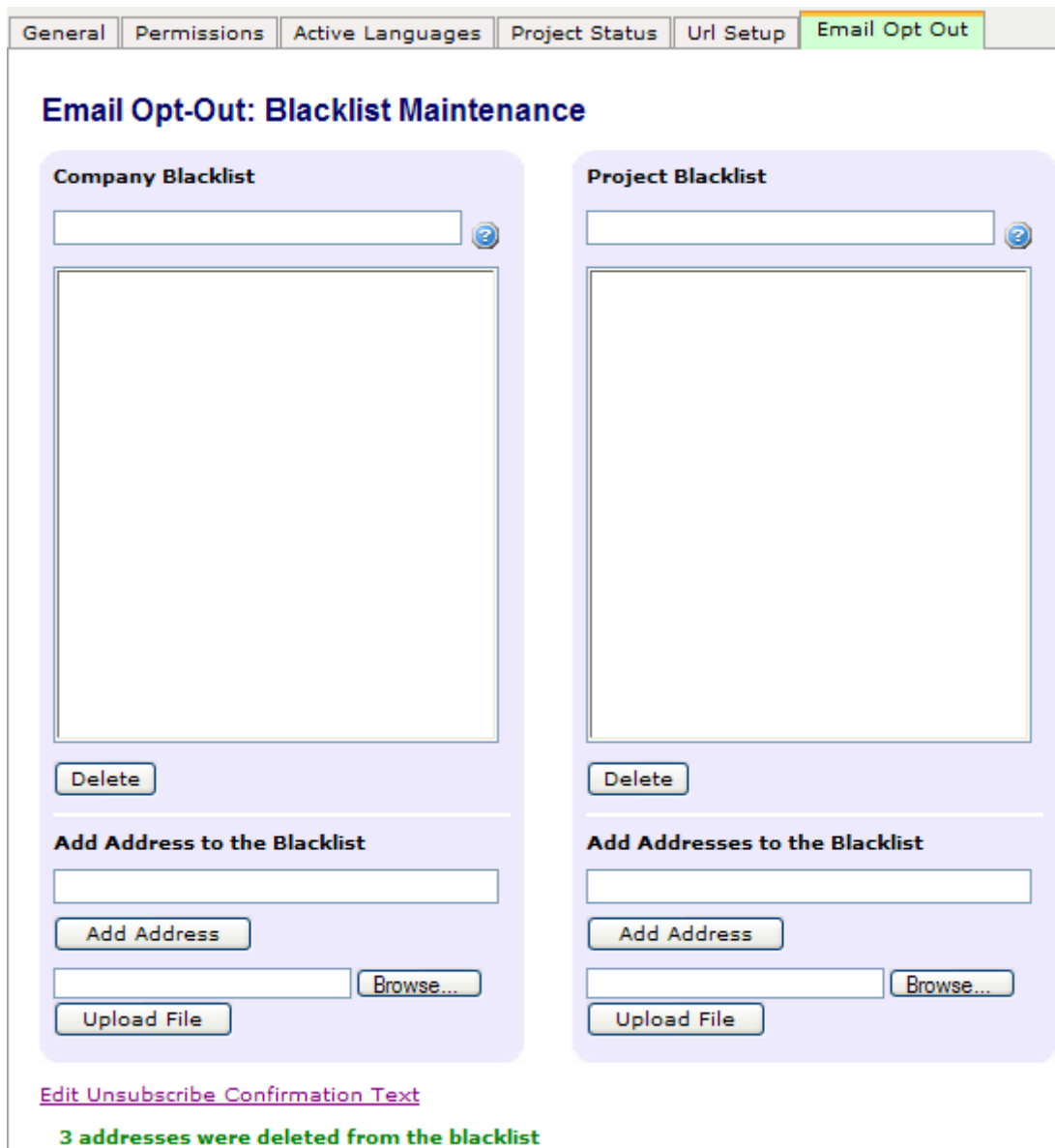


Figure 2 The Email Opt Out tab

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

**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.**

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

A maximum of 100 addresses 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.

Click the **Edit Unsubscribe Confirmation Text** link to go to the Unsubscribe Confirmation page (see the The Unsubscribe Confirmation Page section on page 8 for more information).

### 3.2. Adding Addresses

To add an address to a blacklist:

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

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.**

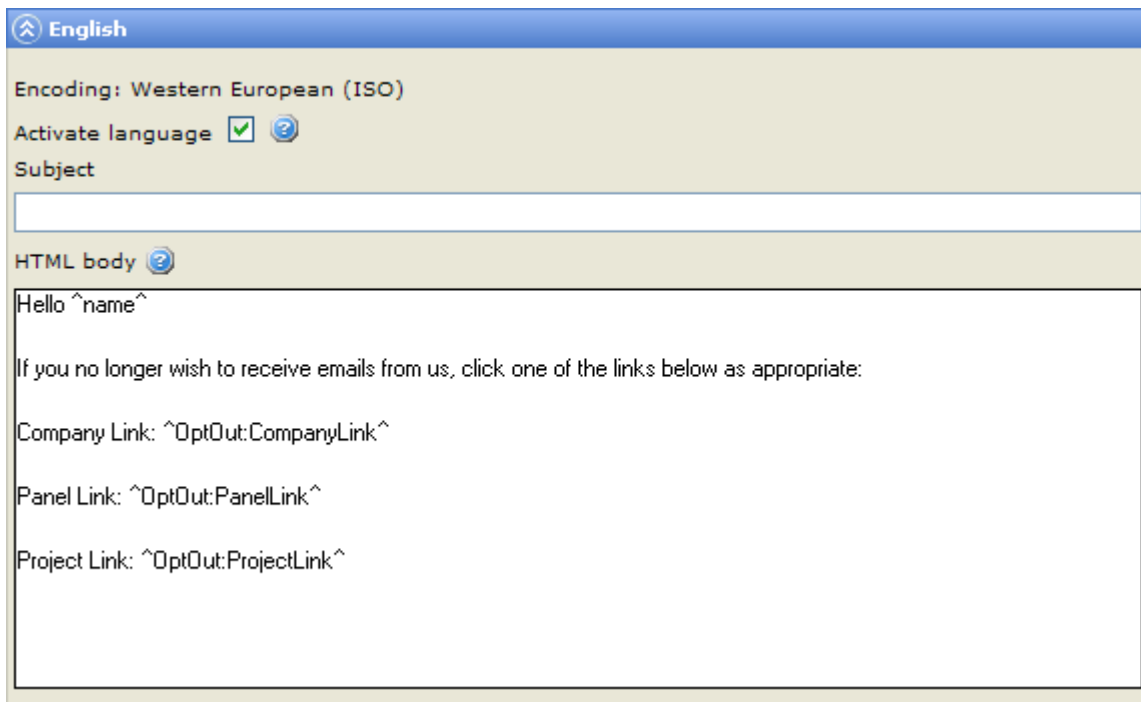
### 3.3. Opt-Out Links

The project 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 project 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 projects. The respondent clicks this link to opt out of receiving any further emails concerning this project.

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 3 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 Project Management) will be incremented. The administrator can then edit the project 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.

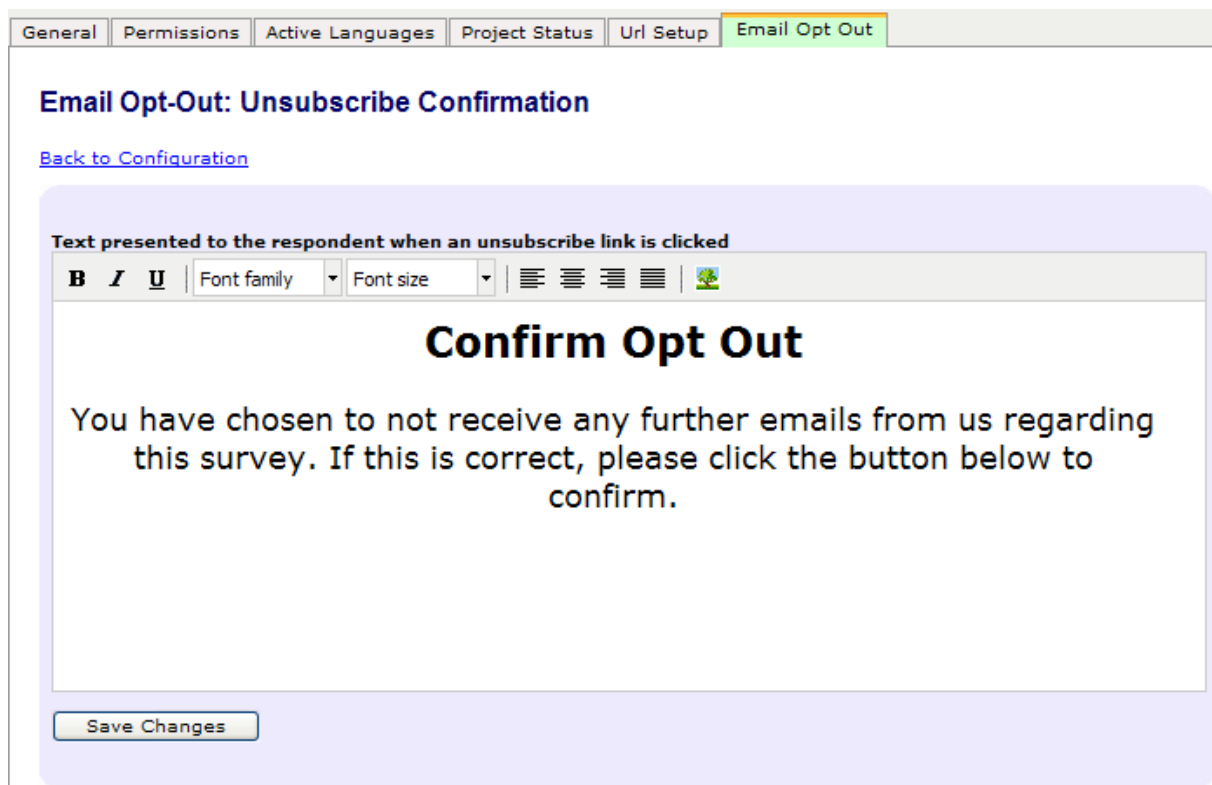
**Note: If the project administrator does not edit the address list, then the opt-out respondent can still be selected to receive email. Although the email will be blocked before it is sent, the project will be affected as fewer emails will then be sent than were originally required.**

### 3.4. 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 project/panel administrator can edit the text in the confirmation page to ensure the text suits the current project or panel.

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

The Unsubscribe Confirmation page opens.



**Figure 4** Example of the Confirm text 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.

### 3.5. 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 project 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.

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

## 4. Geolocation - Introduction

### Important

**The Geolocation extension is an Add-On that is currently offered to On-Demand users only. Commercial terms will apply. The extension is not subject to the overall Confirmit SLA. By using this 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 extension creates and maintains its own database for each survey that uses the extension. This database stores project configuration information, for example which countries are to be blocked, flagged or allowed, the Block Page for the project (see the The Block Page Editor section on page 16 for more information), and the respondent statistics for each configured project. 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 timestamp, 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 The Block Page Editor section on page 16 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:

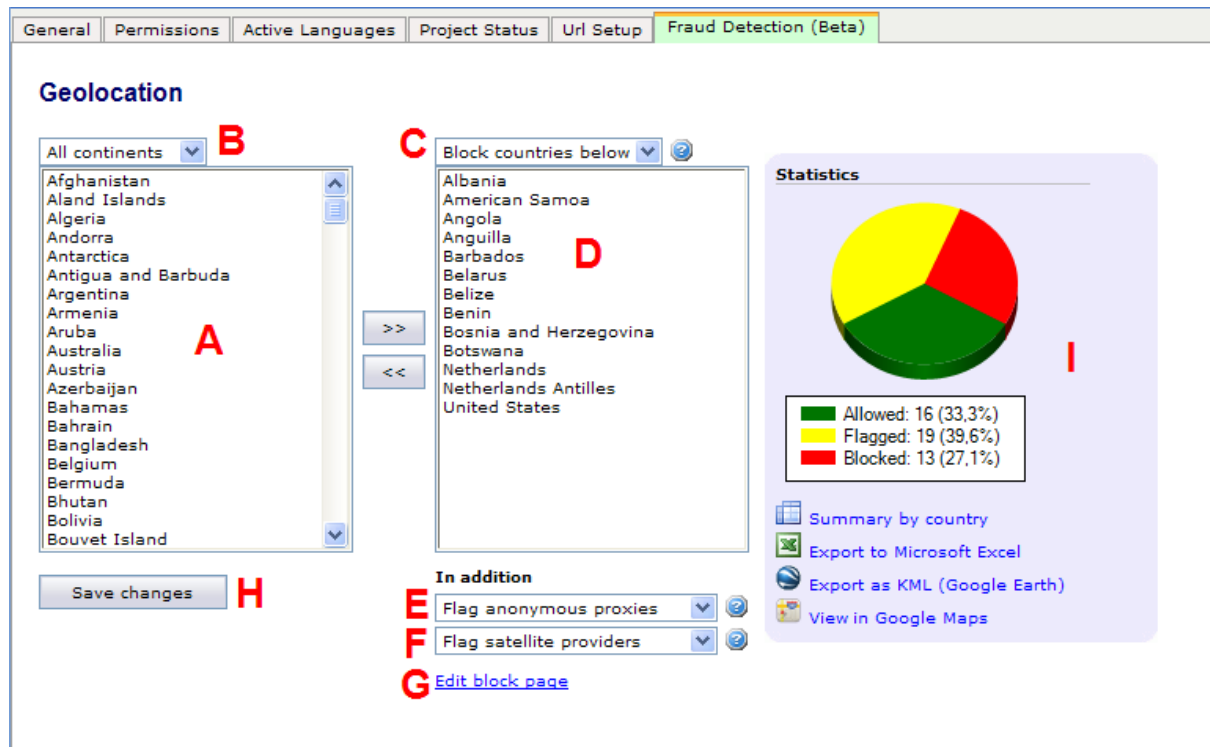


Figure 5 The Geolocation page layout

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 The Block Page Editor section on page 16 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.
  - o **Summary by country** - a list of the statistics, summarized by country, is available (see the The Summary By Country Page section on page 12 for more information).
  - o **Export to Microsoft Excel** - the statistics can be exported to an Excel file (see the Export to MS Excel section on page 12 for more information).

- o **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 the Export as KML (Google Earth) section on page 13 for more information).
- o **View in Google Maps** - click to open Google Maps with the statistics displayed as an overlay (see the View in Google Maps section on page 14 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
<b>Totals</b>	<b>16</b>	<b>33.33%</b>	<b>19</b>	<b>39.58%</b>	<b>13</b>	<b>27.08%</b>	<b>48</b>	<b>100.00%</b>

Showing 1 to 8 of 8 entries

Figure 6 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	<b>Country</b>	<b>Allowed (not flagged)</b>	<b>Flagged (not blocked)</b>	<b>Blocked</b>	<b>Total</b>	<b>Last response date</b>	
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 7 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.

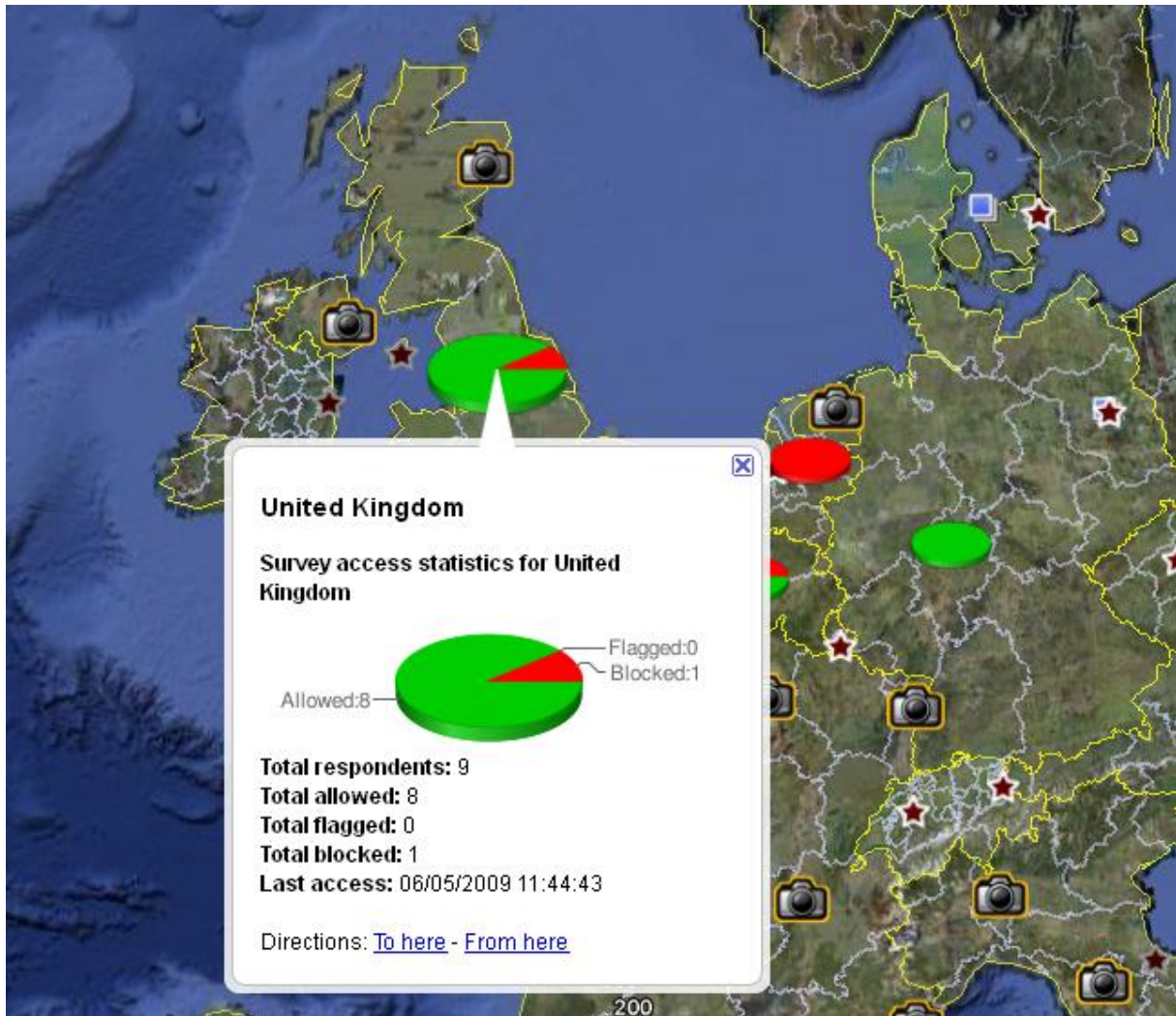


Figure 8 Example of the Export as KML (Google Earth) display

#### 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.

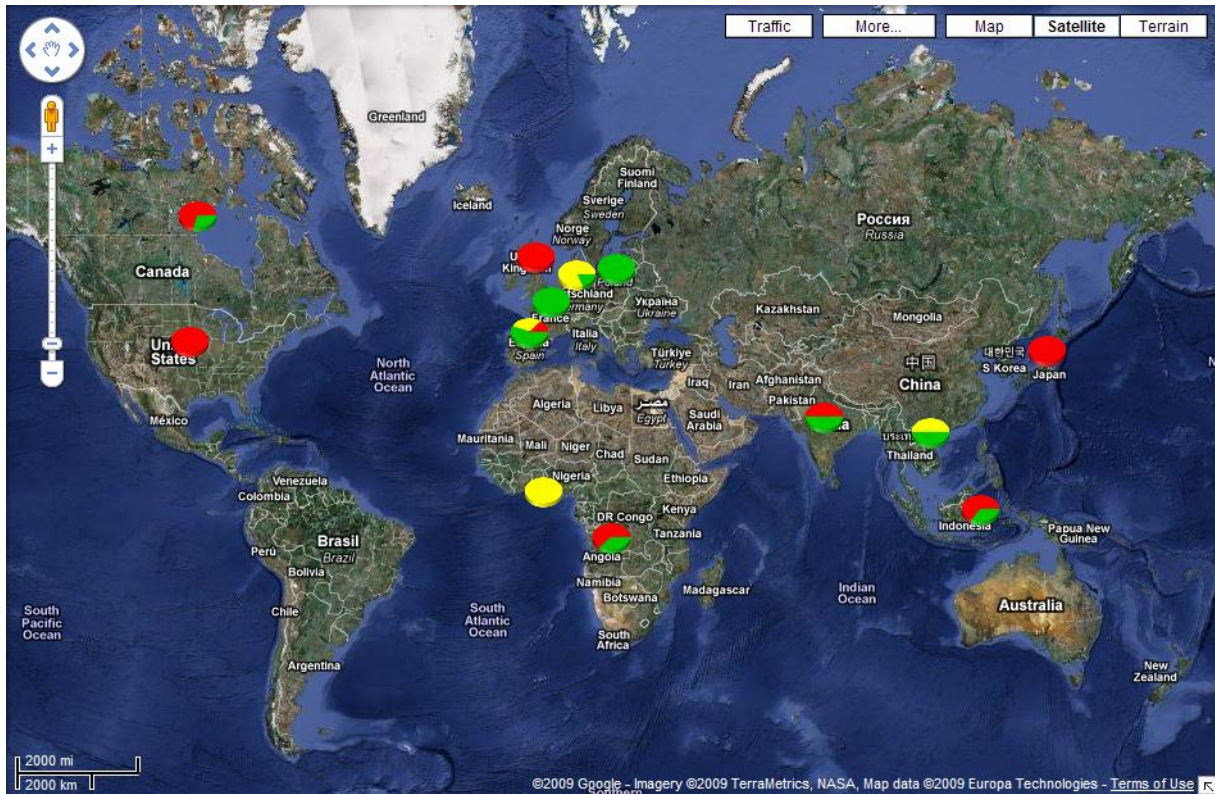


Figure 9 Example of the Google Maps overlay

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
















Figure 10 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.

[Save to My Maps](#)

**Contents**

-  [Angola](#)  
Survey access statistics for AngolaTotal respondents:
-  [Canada](#)  
Survey access statistics for CanadaTotal
-  [France](#)  
Survey access statistics for FranceTotal respondents:
-  [Germany](#)  
Survey access statistics for GermanyTotal
-  [India](#)  
Survey access statistics for IndiaTotal respondents:
-  [Indonesia](#)  
Survey access statistics for IndonesiaTotal
-  [Japan](#)  
Survey access statistics for JapanTotal respondents:
-  [Poland](#)  
Survey access statistics for PolandTotal respondents:
-  [Spain](#)  
Survey access statistics for SpainTotal respondents:
-  [United Kingdom](#)  
Survey access statistics for United KingdomTotal
-  [United States](#)  
Survey access statistics for United StatesTotal
-  [Unknown IP](#)  
Survey access statistics for Unknown IPTotal
-  [Vietnam](#)  
Survey access statistics for VietnamTotal

Displaying content from [frauddetection.testlab.firmglobal.net](http://frauddetection.testlab.firmglobal.net)

The content overlaid onto this map is provided by a third party, and Google is not responsible for it.

Figure 11 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 The Geolocation Interface section on page 10 for more information). This editor allows you to set up the page to present the message you wish to give.

## Geolocation - Edit block page

The following text will be displayed to all respondents eventually blocked by the Geolocation extension.



Figure 12 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. iPhone Surveys

### Important

**The iPhone Surveys extension is an Add-On that is currently made available only to On-Demand users. Commercial terms will apply. This extension is not subject to the overall Confirmit SLA.**

The iPhone Surveys extension is built by Confirmit. When this extension is activated for a survey (no re-launch is required), any respondent entering the survey via an iPhone or iPod Touch will be shown a customized "iPhone" look and feel. The extension makes predefined changes to the survey layout to emulate the iPhone experience. It is not possible to alter this layout through any layout/template system. Points to note include:

- HTML code entered in Confirmit will be displayed (such as <img> tags), but any scripts tags will be removed.
- Only one question will be displayed on the screen at a time.
- 3D grids will be split into separate questions.
- The "Auto-other" and "Single-punch" properties for exclusive are automatically enabled.
- Page transitions are made using Ajax, minimizing the bandwidth used by the mobile browser.
- iPhone surveys will also work on iPod touch.

The following "Best practices" should be employed when creating surveys that are expected or intended to be responded to via iPhones:

- Long texts should be avoided as these will break over several lines on the iPhone.
- 3D Grids should be avoided. Even though they are supported, they might not make as much sense when each question is displayed by itself. In addition, the "Title", "Text", and "Instruction" for the 3D Grid will not be repeated for the various questions inside the grid, but will be displayed as an Info node before the questions are displayed. Also, any error messages that may be generated for questions inside a 3D Grid will be confusing to the reader as it is not possible to know which question inside the 3D Grid has failed; as far as the validation system is concerned the 3D Grid is one question, so the error message is displayed for every question.
- Long surveys should be avoided as iPhone surveys do not display a progress bar.
- A long-list of answers should be displayed as a drop-down, otherwise the respondents will have to scroll to the bottom of the page to reach the navigation buttons.

The following question types and features are currently not supported:

- Hierarchy questions.
- Searchable multis.
- Dynamic questions.
- Advanced WI Features (sliders etc).
- It is not possible to alter the layout of a question.

**Note: The link that Confirmit redirects to when opening a survey on an iPhone should not be bookmarked or distributed. The links are only valid for 5 seconds and the survey can only be accessed through the original link.**

## 6. SMS Surveys - Introduction

**Important**

**The SMS Surveys extension is an Add-On that is currently made available only to On-Demand users. Commercial terms will apply. This extension is not subject to the overall Confirmit SLA.**

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 a minority of SMS providers (at this time only Clickatell). In the event a respondent sends a long message and it is not supported by the provider, the message will normally be truncated.
- Open surveys and limited surveys with and without password are supported (see the Limited Surveys section on page 31 for more information).
- When uploading respondents to the project, use the mobile phone number including country code for the UserID.
- Incomplete or inactive responses will be deleted after a preset time (not yet decided).

**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.**

### 6.1. How a Respondent Accesses an SMS Survey

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 4421502500 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.

Invitations to participate can also be sent via email (see the Sending SMS Invitations via Email section on page 32 for more information).

**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.**

## 6.2. 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 the respondent is to respond to them. For some question types, a hint is automatically added to the message to guide the respondent on how to reply. These hints are currently available only in English.

- **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
```

### 6.3. How to Set Up an SMS Survey

To set up a survey for SMS responses:

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 should 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 **Project Management > Flex Extensions** menu command and activate the SMS Surveys extension for the survey.
3. Go to the **Project Management > Overview** menu command and open the Project Overview page for the survey.
4. Open the SMS Surveys tab (see the The SMS Surveys Tab section on page 21 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 Project 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 the Limited Surveys section on page 31 for more information).
10. If you wish to send the invitations via email, create the email (see the Sending SMS Invitations via Email section on page 32 for more information).
11. Test the setup - send an invitation message to yourself and ensure the survey functions as planned).

#### 6.3.1. The SMS Surveys Tab

When the SMS Survey extension is activated for your company, the SMS Surveys tab becomes available in the Project Overview page (go to **Project 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.

### 6.3.1.1. 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
clickatell	X	X		X	X	www.clickatell.com
esendex		X		X	X	www.esendex.co.uk
Multitech					X	www.multitech.com
SMSTrend					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

\*per 6th October 2010

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*
---------------	----------------------

Clickatell	Clickatell offers two-way messaging in UK, Australia, Denmark, Sweden, Germany ( <a href="http://www.clickatell.com/products/two_way.php">http://www.clickatell.com/products/two_way.php</a> ) and short code in South Africa, Namibia, USA, Canada, UK and Australia ( <a href="http://www.clickatell.com/products/shortcode.php">http://www.clickatell.com/products/shortcode.php</a> )
Esendex	USA, Australia, Germany, Spain, France, Ireland, UK
MultiTech	<Hardware based>
SMSTrend	Australia, Austria, Belgium, Czech Republic, Denmark, Deutschland, Spain, France, Ireland, Italia, Netherlands, New Zealand, Poland, Portugal, Switzerland, Turkey, UK, USA
TextAnywhere	UK
Vianett	Denmark, Finland, Norway, Sweden ( <a href="http://sms.vianett.com/prices">http://sms.vianett.com/prices</a> )
Vibes	USA
Wire2Air	USA

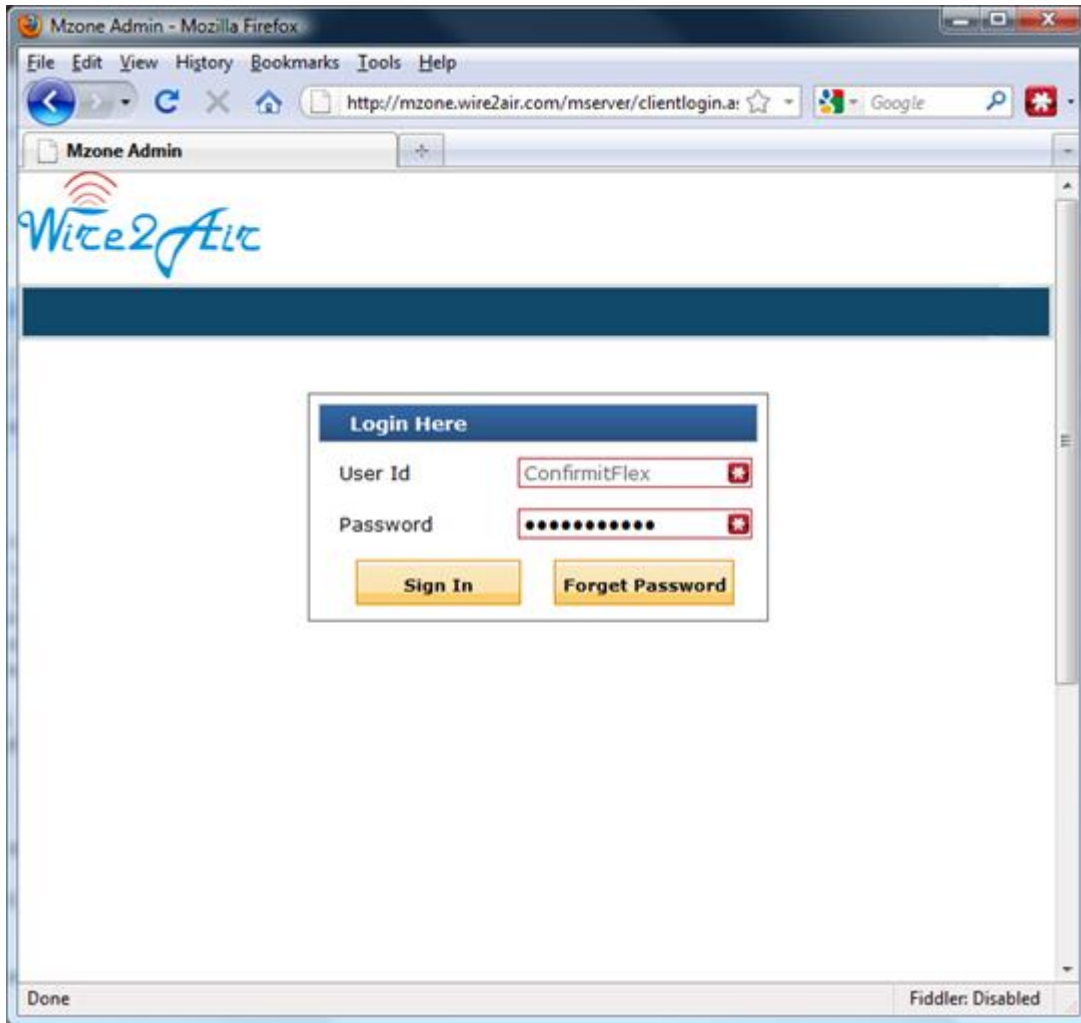
\*per 6th October 2010

### 6.3.1.1.1. Wire2Air Keyword Management

When setting up an SMS survey that uses the Wire2Air shared short code, you need to allocate the keyword both in Confirmit (the SMS Surveys tab) and in the Wire2Air Management console. Proceed as follows:

1. Allocate your keyword in Confirmit (see the How to Set Up an SMS Survey section on page 21 for more information), then:
2. Go to <http://mzone.wire2air.com/mserver/clientlogin.aspx>.

The log-in window opens.



*Figure 13 The Wire2Air log-in window*

3. Type your User Id and Password into the appropriate fields (these will have been provided by Wire2Air when your company registered with them) and click **Sign In**.

The Management Console opens.

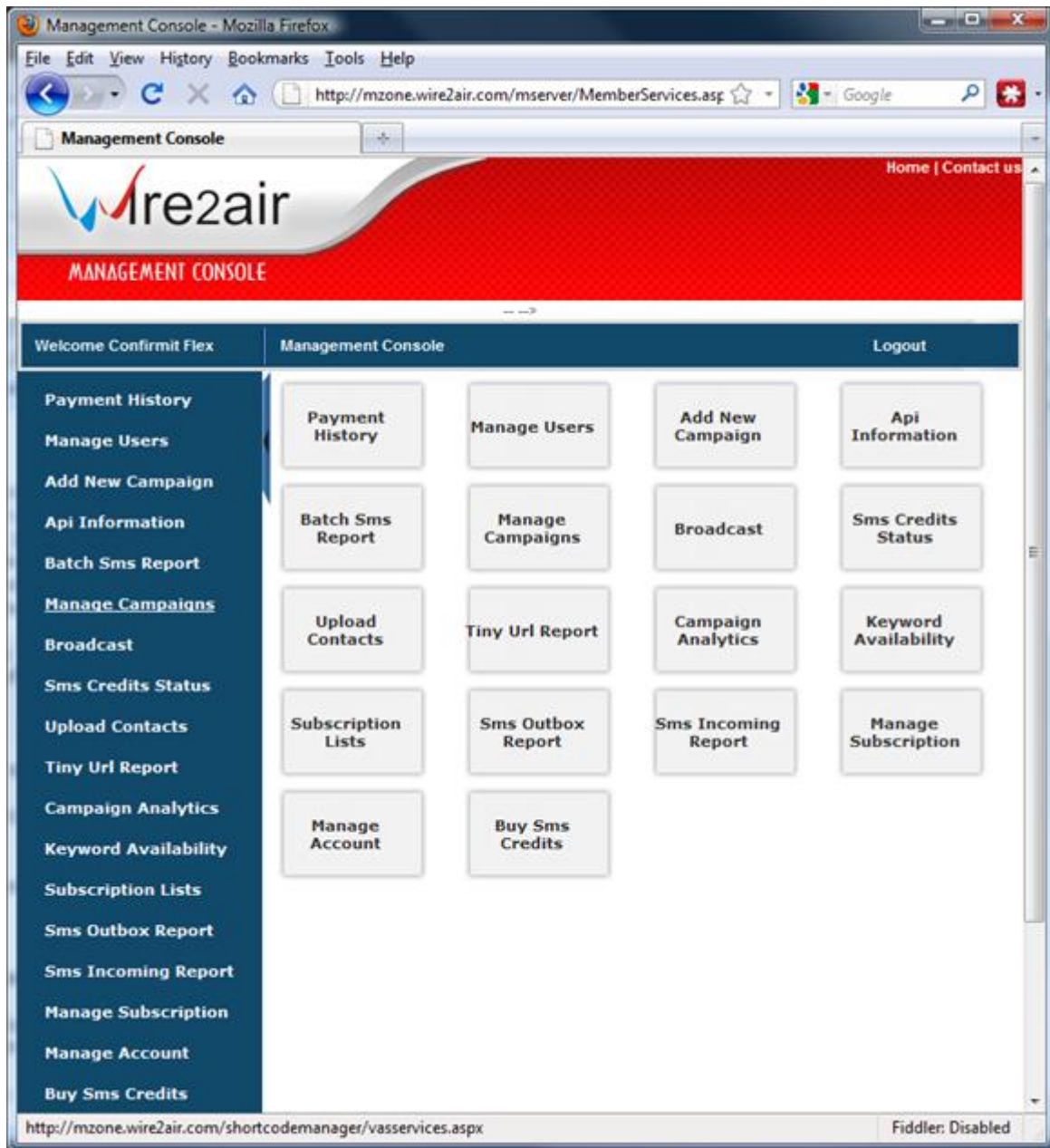


Figure 14 The Wire2Air Management Console

You must now select the correct campaign.

4. Click **Manage Campaigns**.

The Manage Campaigns page opens.

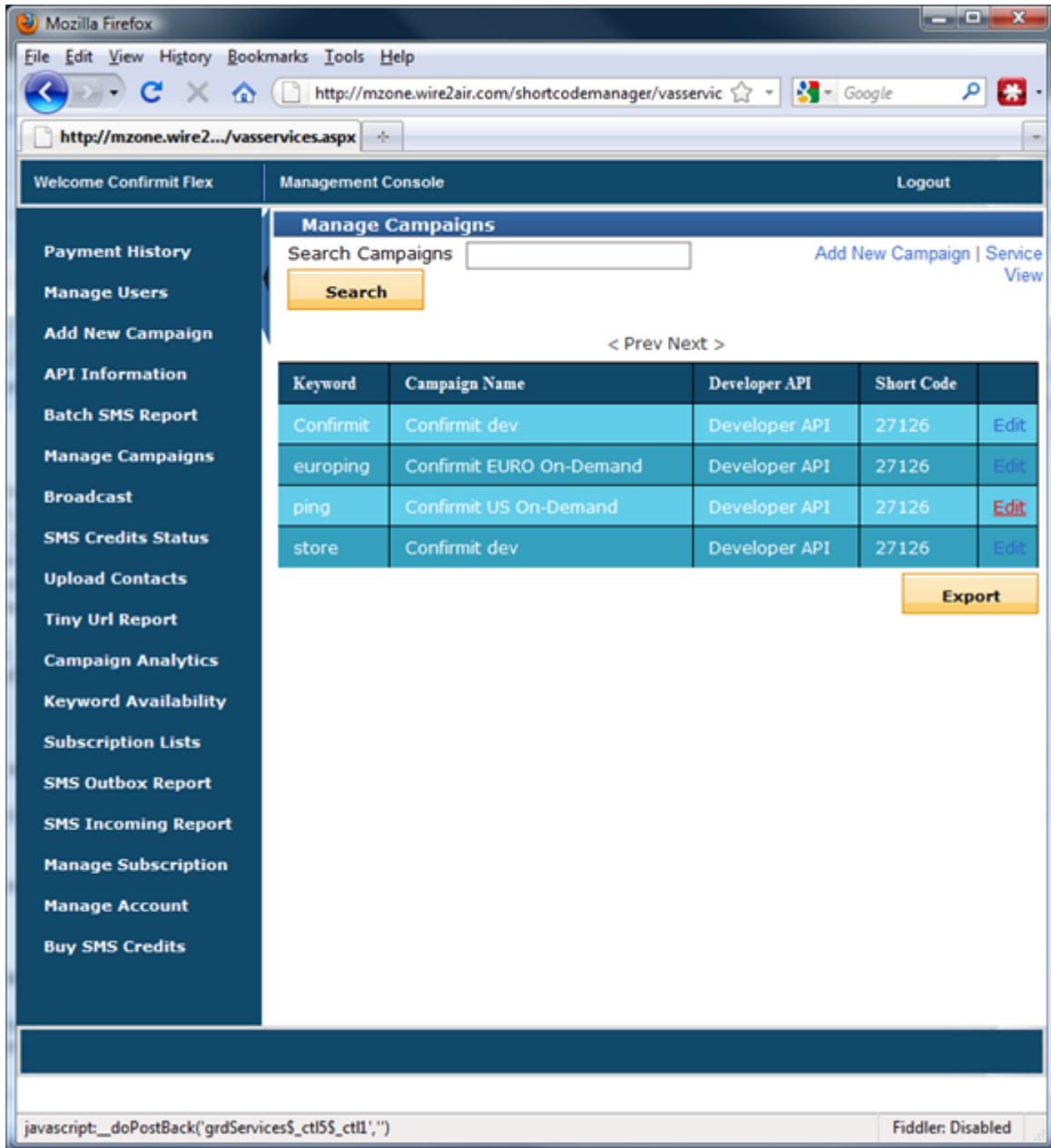


Figure 15 The Manage Campaigns page

5. Select **Confirmit US On-Demand** or **Confirmit EURO On-Demand** as appropriate and click the **Edit** link. The View ... Service page opens.

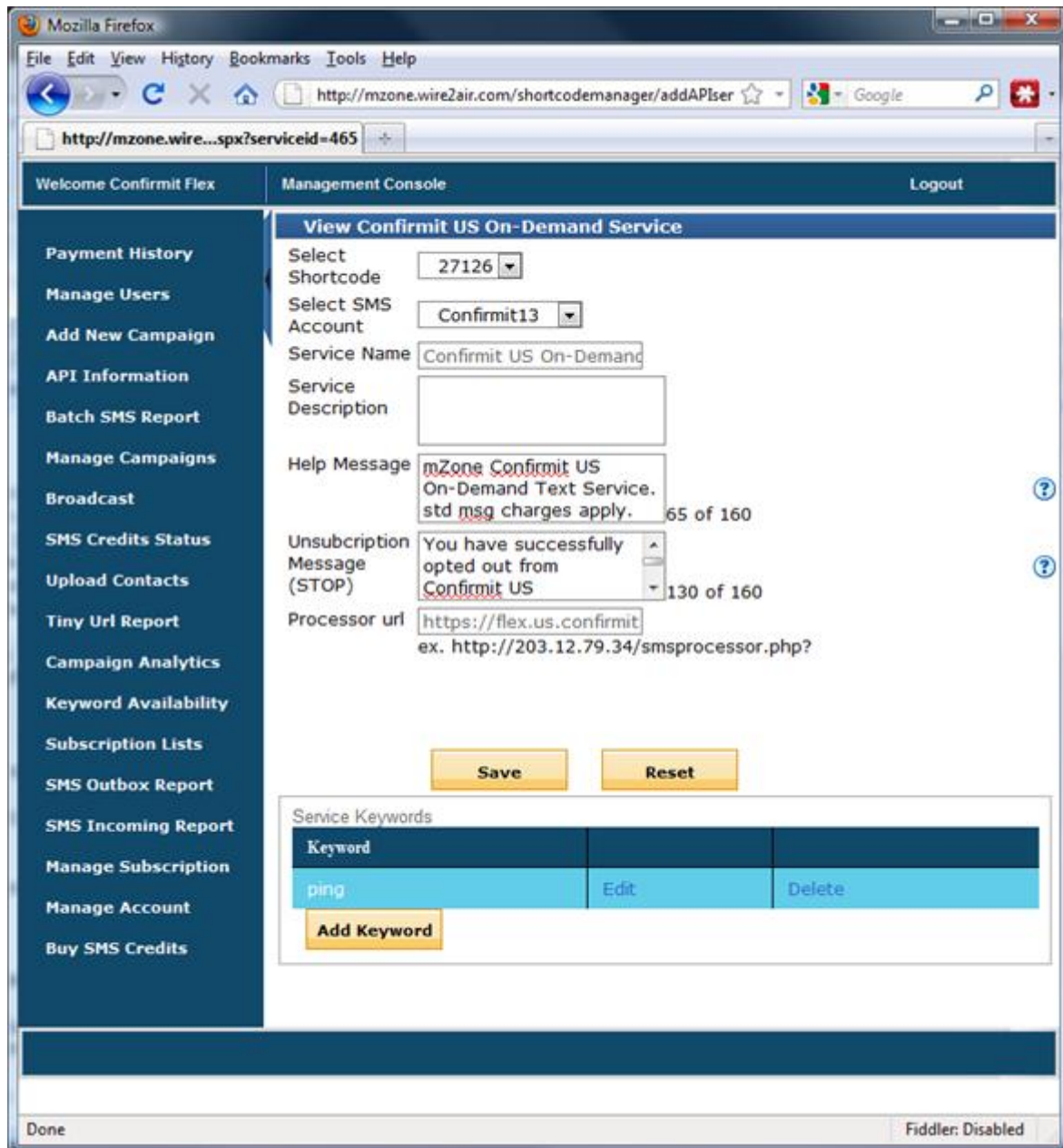


Figure 16 Example of the View Service page

**Note: Do not change any of the information in the fields above the Save button!**

6. Click the **Add Keyword** button towards the bottom of the page.  
A new row appears in the Keyword list.

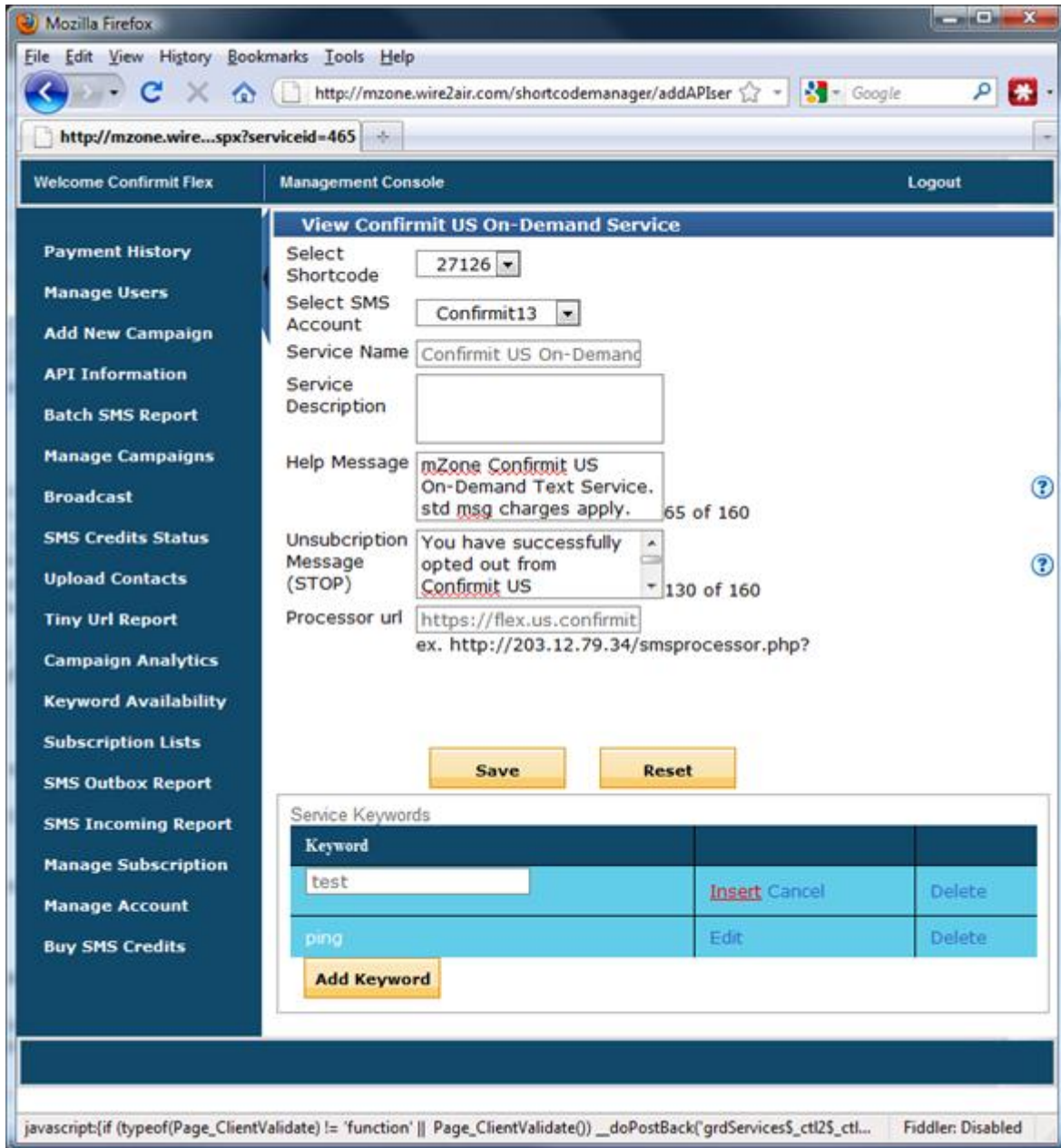


Figure 17 Adding the new keyword

7. Type your new keyword into the field and click the **Insert** link.  
Your keyword is now ready to use.

### 6.3.1.2. 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.

**Company SMS provider configuration**

<b>SMS Providers</b>		<b>Sender Id's</b>
SMS Provider	Clickatell	447624803771
<b>Config values</b>		
API_ID	.....	
User	.....	
Password	.....	
<b>Info about SMS callback configuration</b>		
Reply Path	HTTP POST	
Target Address	http://flex15.firmglobal.com/SmsSurveys/ClickatellInboundMessage.ashx	
<b>Clickatell</b>		
Online SMS Gateway covering 819 networks in 221 countries and territories. <a href="http://www.clickatell.com">www.clickatell.com</a>		

*Figure 18 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 projects 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.
- **Event log** - a list of information that builds up in the bottom area 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 will see only the events concerning the project he/she is working on, while an Administrator will see the events for all the projects administered by the company.

**6.3.1.3. 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:

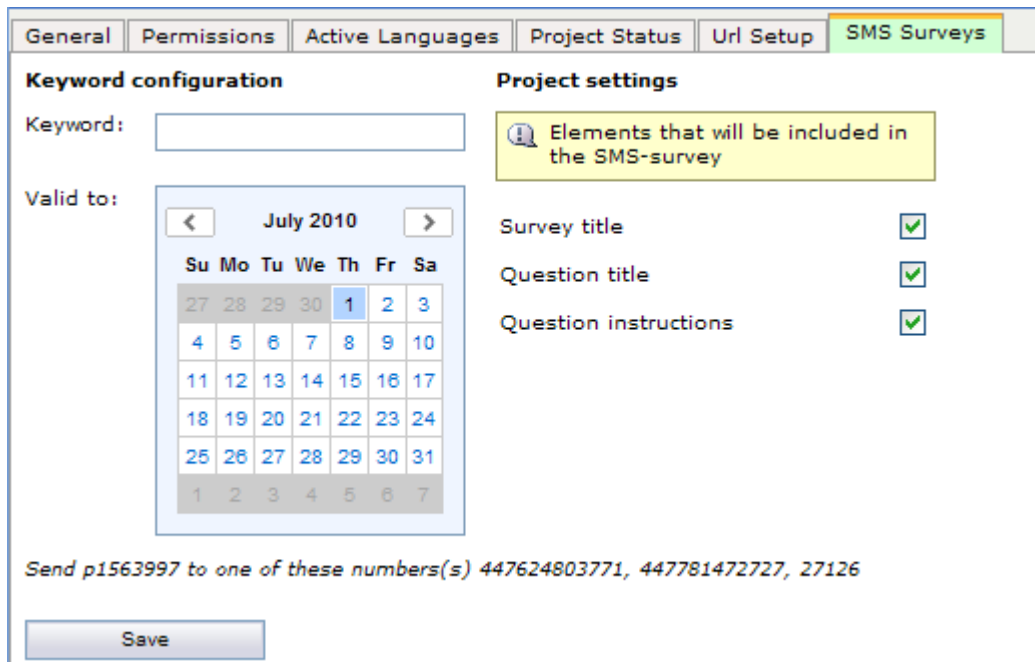


Figure 19 The options available to a project administrator

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.
  - o **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.
  - o **Question title** - check the box to include the question title for each question.
  - o **Question instructions** - check the box to include the question instruction for each question.
- **Event log** - this is the list of information that builds 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.

### 6.3.2. 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 project, and will be able to respond to the survey through replying to the messages.

**Survey type**

- Open survey (Gives you a general link to the interview, which e.g. can be used as hyperlink on your website)
- Inline survey (Generates a script tag which can be included on any web-page, to display the survey inline or as a

**Figure 20 Setting the survey Open**

### 6.3.3. 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 project. 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 The SMS Surveys Tab section on page 21 for more information).

**Survey type**

- Open survey (Gives you a general link to the interview, which e.g. can be used as hyperlink on your website)
- Inline survey (Generates a script tag which can be included on any web-page, to display the survey inline or as a
- Pop-up survey (open survey, but will automatically close browser window on last page)
- Limited survey - Email invitation survey (Requires an uploaded respondent list with email field)
- Limited survey with login page (Requires an uploaded respondent list with userid & password fields)
- Require only userid to access limited survey

**Figure 21 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 The SMS Surveys Tab section on page 21 for more information).

**Survey type**

- Open survey (Gives you a general link to the interview, which e.g. can be used as hyperlink on your website)
- Inline survey (Generates a script tag which can be included on any web-page, to display the survey inline or as a
- Pop-up survey (open survey, but will automatically close browser window on last page)
- Limited survey - Email invitation survey (Requires an uploaded respondent list with email field)
- Limited survey with login page (Requires an uploaded respondent list with userid & password fields)
- Require only userid to access limited survey

**Figure 22 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

### 6.3.4. 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	sms@messaging.clickatell.com
Respondent2	4498765432	sms@messaging.clickatell.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.

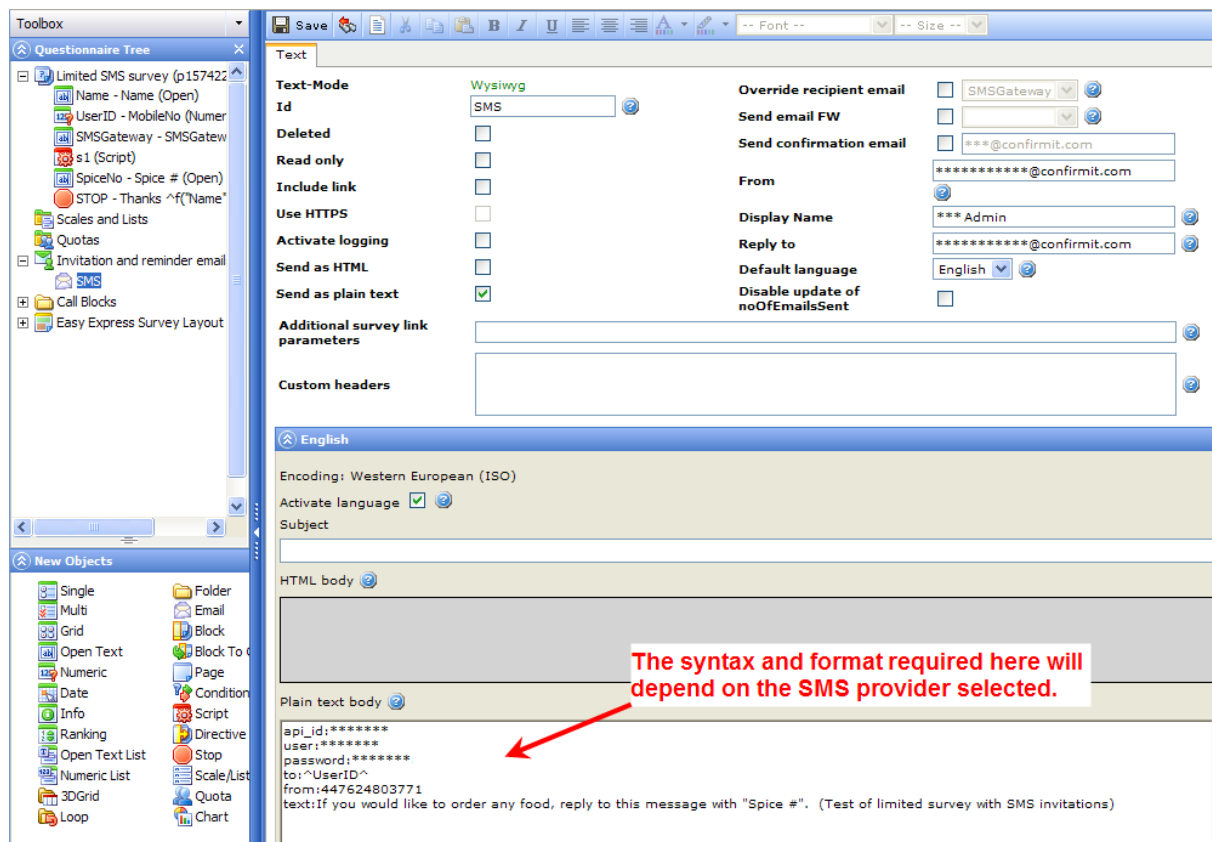


Figure 23 Example of an email invitation to participate in an SMS survey

## 6.4. 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.

## 6.5. Scripting

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

### 6.5.1. 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.

### 6.5.2. 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 Hashtable 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**.

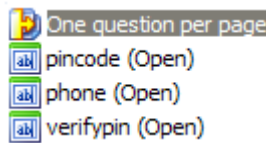
Below is an example of a SendSMS function using the PostRequest method and the Request parameters described above to trigger an SMS to be sent from a script in an SMS survey:

```
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 24** The questions added to enable verification of identity

3. In the "phone" question, insert the following script in the validation code (replace "XXXXXXXXXXXX" 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"] = "XXXXXXXXXXXX";
    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.");
}
```

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