CONFIRMIT ADMINISTRATOR GUIDE

C15 Revision 2

The information herein describes Confirmit and its features as of July 2010. New features may be introduced into Confirmit 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 ?

The following changes have been made in revision 2 of the Confirmit 15 Administrator Guide

- The Company Details > Security Tab section is updated to include the Enforce db encryption functionality (see section 6.4.2.3. Company Details Page Security Tab for more information).
- The Database Encryption add-on information is added to the Add-on Modules section (see section 6.4.3. Add-on Modules for more information).
- The Changes to Add-ons section is moved to the Admin Accounts chapter (see section 6.4.3.2. Changes to Add-ons 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. Definitions

Software Administrator – The person designated to administrate the software-related aspects of Confirmit (users, permissions, etc). This is done through the software interface. Technical skills are not required for this position.

Server Administrator – The person designated to perform installation, maintenance and upgrades on the Confirmit servers. Technical skills are required for this position. See the separate documentation: Confirmit Server Manual.

This manual is written for the System Software Administrator.

2. Software Administrator Permissions in Confirmit

This chapter briefly describes the access the software administrator will normally have in the various areas within Confirmit.In addition to access to the functionality in the Confirmit Admin menu.

You also have access to other administrative functionality elsewhere in Confirmit. This functionality is described in more detail later in the Other Properties and Functionality chapter.

Note: A company-wide setting to improve system security can be activated such that system administrators are only allowed to log into Confirmit if their computers' IP address is within a specified range of addresses. This is controlled by the ValidIPRangeForSysAdm configuration setting.

2.1. Permissions in Projects

As the Software Administrator, you have access to all projects, reports, forms and end-user lists on the server, and can give yourself and other users read, write, delete, and administration permissions to these objects. You can also give Online Coding Administrator permissions and Open Text Coder permissions on all projects via the **Project Management > Overview > Permissions** tab.

When you first open a project as Administrator, the project will be Read-only to you. You must then go to the Permissions tab and set the required permission. Users with the ProS or system_project_administrate permissions will have an additional button, **Claim Full Access**, in the Permissions tab toolbar. Click this button to give yourself all permissions for the selected project.

2.1.1. Precode Validation

Towards the bottom of the **Project Management > Overview > General** tab is the Precode check parameter. This parameter can be set to Enabled or Disabled. Default is Enabled.

When Enabled, the Precode Check validates all precodes in answer lists, predefined lists and loop members in questionnaire designer and under database generation, and checks for duplicate precodes.

In cases where it is decided to keep "illegal" precodes, for example on projects created and compiled before this check was introduced (it was introduced in Confirmit version 8.1), a Software administrator must set the Precode check to Disabled as shown in the figure below.

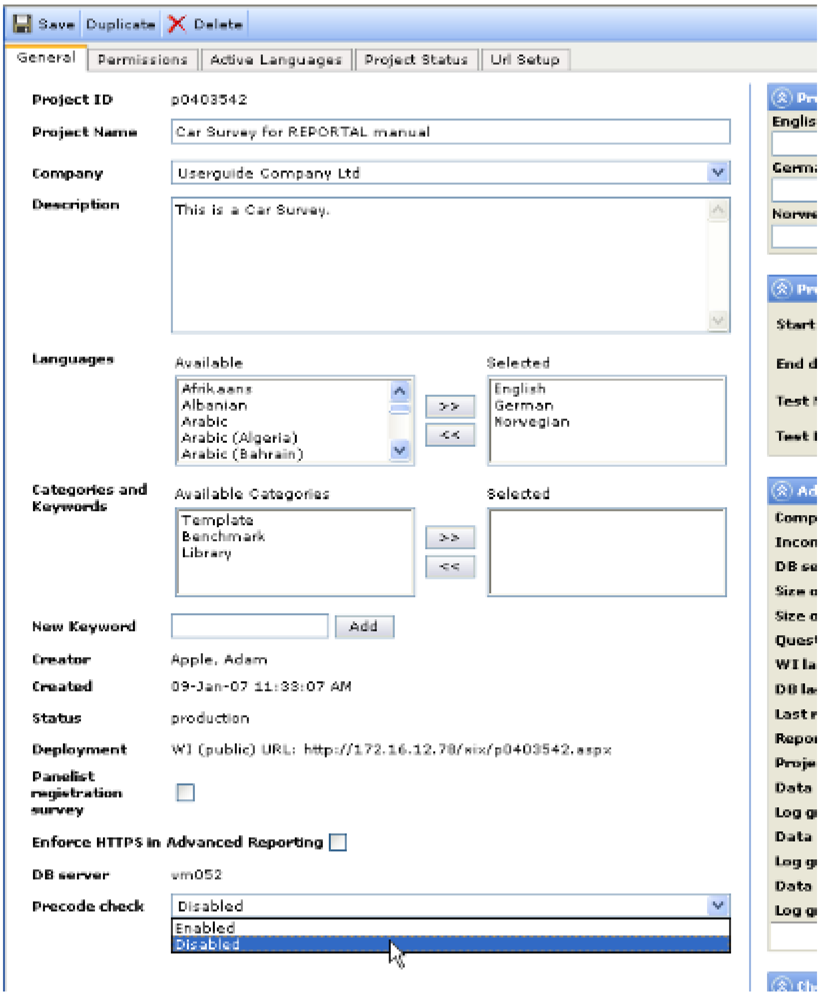


Figure 1 Disabling the precode check

2.1.2. Change the Company

In the event a project is registered under the wrong company, the Software Administrator who has the system_administrate or system_project_administrate permission can change the company so that transactions are logged under the correct company. To do this:

1. Open the appropriate project.
2. Go to the **Project Management > Overview > General** tab.
3. Click the down-arrow beside the **Company data** field to open a drop-down list of the registered companies, then select the required company.
4. Click **Save** to save the changes.

2.2. Permissions on Tasks

In the **Home > Tasks > Search** tab, a search field called User ID is available to the Software Administrator. The Software Administrator can search for all tasks initiated by all Confirmit users on the current server.

2.3. Permissions on WI Templates

In **Home > Templates > WI Templates**, the Software Administrator can search for all templates on the server and has the permission to change the company on WI templates.

The Software Administrator also has permission to use the "Copy to clipboard" and "Fill from clipboard" functionality in the WI template editor.

- **Copy to clipboard** – the HTML code in all the fields of the active template is copied to the clipboard.

- **Fill from clipboard** – the HTML code previously copied to clipboard (for all fields in the template) is filled into the active template.

This enables the administrator to copy templates from one server to another.

Figure 2 Clipboard in WI Template

2.4. Permissions in Panel Templates

The Software Administrator has permission to change the company on a panel template.

2.5. Permissions in Community Portals

The Software Administrator has access to all Community Portals in Confirmit.

2.6. Permissions in Survey Layouts

The Software Administrator has access to all survey layouts in Confirmit.

Only the system administrator / global template administrator can set survey layouts to be global. A company administrator can set survey layouts to be "public" but only within the company.

Note: If you are logged on to Confirmit as system / template / global / company administrator, three additional columns will be displayed in the Survey layout list. These show the Public, Express and Company Specific checkbox settings for the layouts listed.

2.7. Permissions in Reportal

The Software Administrator has permission to administrate all functionality in Reportal.

The Software Administrator is able to change the company on Reports and Data Sources in Reportal so that the transactions are logged under the correct company. This is done in the report or data source properties in the Company drop-down.

2.8. Permissions in End User Lists

The Software Administrator has access to all End User Lists on the server. Refer to the Confirmit Authoring User Guide for detailed information on administrating end users.

2.9. Permissions in Database Designer

The Software Administrator has access to all forms on the server.

3. The Admin Menu

The Admin menu provides the company Software Administrator with a set of tools to administrate and monitor server activities and Confirmit users.

The menu includes tools for:

- Administrating companies and users (see section 6. Admin > Accounts for more information).
- Publishing news updates (see section 8. Admin > News Update for more information).
- Updating and translating survey messages and language updates (see section 11. Admin > Languages and Messages for more information).
- Viewing system activities that have been carried out in a certain period of time and/or for predefined projects (see section 5. Admin > Activity Logs for more information).
- Checking CPU usage (see section 5. Admin > Activity Logs for more information).

These last two allow you to check for transactions, hits and other actions performed on projects, allowing you to identify “problem” projects.

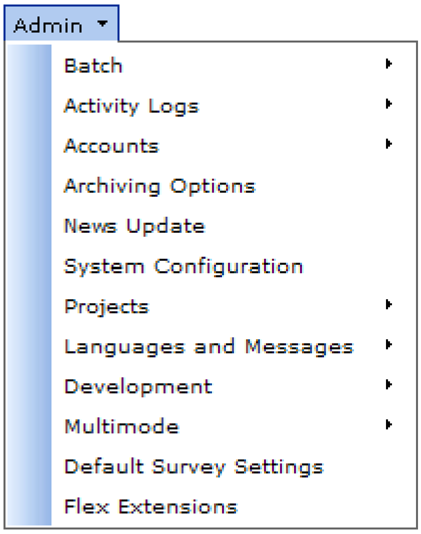


Figure 3 The Admin menu

This manual describes all functionality in the Confirmit Admin menu, in the order it appears in the menu (see above).

4. Admin > Batch

The following options are available in the **Admin > Batch** menu:

- **Server Activity** - shows the current server activity.
- **Server Config** - enables you to configure the servers.
- **Task Type Configuration** - enables you to configure the tasks.
- **Tasks** - opens the Task management page.
- **Task System Cleanup** - removes temporary files.

4.1. Admin > Batch > Server Activity

The Server Activity page shows the current load and the processes running on the Confirmit batch servers. Click the **Autorefresh on** button to make the page refresh automatically every 5 seconds.

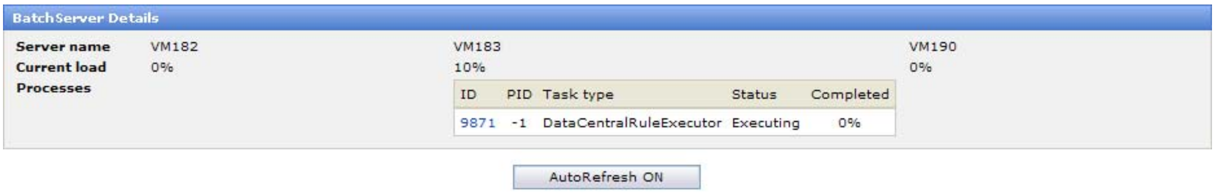


Figure 4 The Server Activity page

4.2. Admin > Batch > Server Config

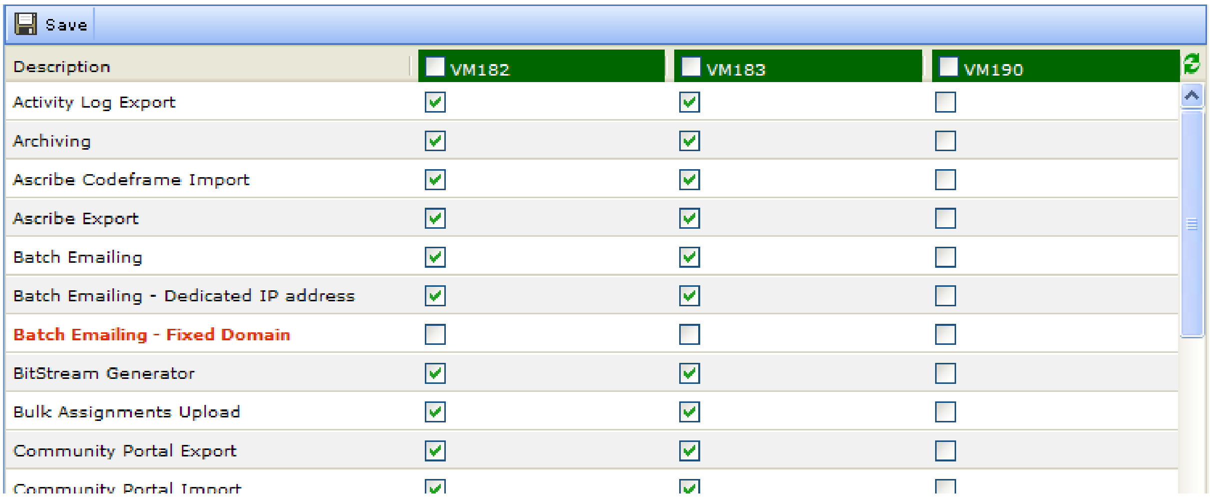
The Batch Server Configuration page displays information relating to the servers that are available for the various batch jobs and tasks (see the figure below), and allows you to specify which servers are to be used when running the various tasks. It also shows the status of the servers, that is, whether they are running or are stopped.

The servers are color-coded red or green:

- **Green** – means that the server is running.
- **Red** – means either that the server is not running, or that the batch executor initiating the batch jobs is not running even though the server is running.

The figure below shows an example of a system with three servers, all of which are currently running.

To allocate batch jobs to the servers (if you have a multiple server installation), check the boxes corresponding to the appropriate jobs and servers. If a task is not specified to run on any of the available servers, the text for that task will turn red. For a more detailed explanation of the processes, see the Confirmit Server Manual.



Save

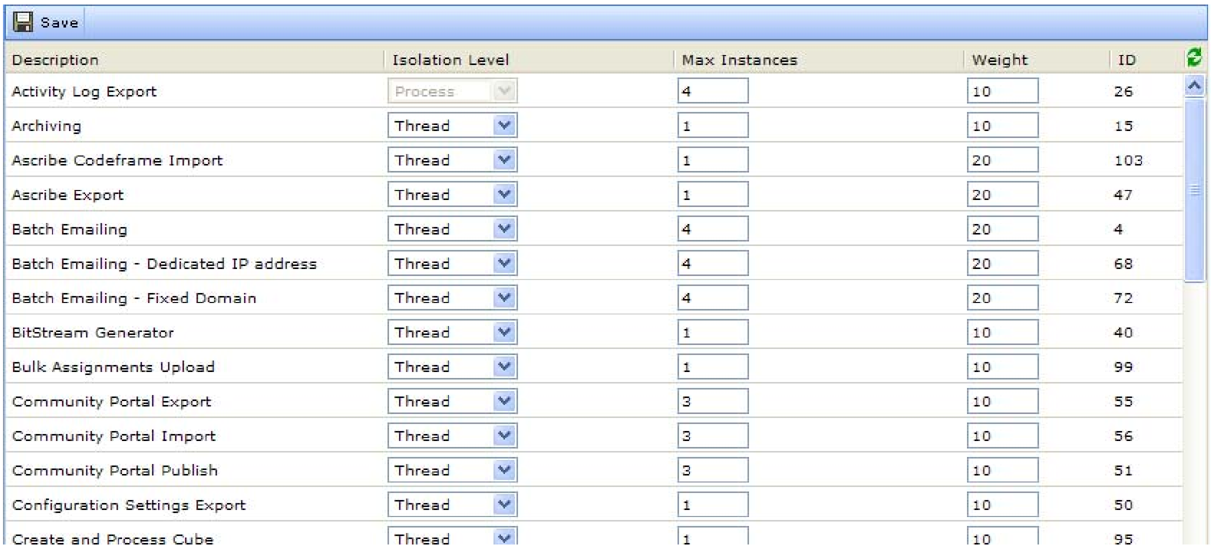
Description	VM182	VM183	VM190
Activity Log Export	☑	☑	☐
Archiving	☑	☑	☐
Ascribe Codeframe Import	☑	☑	☐
Ascribe Export	☑	☑	☐
Batch Emailing	☑	☑	☐
Batch Emailing - Dedicated IP address	☑	☑	☐
Batch Emailing - Fixed Domain	☐	☐	☐
BitStream Generator	☑	☑	☐
Bulk Assignments Upload	☑	☑	☐
Community Portal Export	☑	☑	☐
Community Portal Import	☑	☑	☐

Figure 5 The Server Configuration page

4.3. Admin > Batch > Task Type Config

Go to **Admin > Batch > Task Type Config** to configure the Confirmit batch tasks (see the figure below). To change the settings on this page you must have the System_Batch_Administrate permission (see section 6.1.3. How to Edit a User's Details for more information). Users without this permission are only able to view these values. The columns are:

- **Description** - the name of the task.
- **Isolation Level** - each task can be configured with an isolation level. The options are:
  - **Thread** - the lowest isolation level, highest performance. With this level, the task runs in a separate thread in the common task system application domain.
  - **AppDomain** - the task runs in a separate application domain that is created for this task instance.
  - **Process** - this is the highest isolation level, and gives the lowest performance. This level runs the task instance in a separate process.
- **Max Instances** – the maximum number of instances that can run at one time on one batch server.
- **Weight** – used to indicate how resource-demanding the task is. For example, a batch server can run five tasks with weight 20 but only two tasks with weight 50 simultaneously. Each server may run a number of tasks of different types in parallel, and the task system will ensure that the sum of the weights for those tasks are less than or equal to 100.
- **ID** – the ID number of the task.



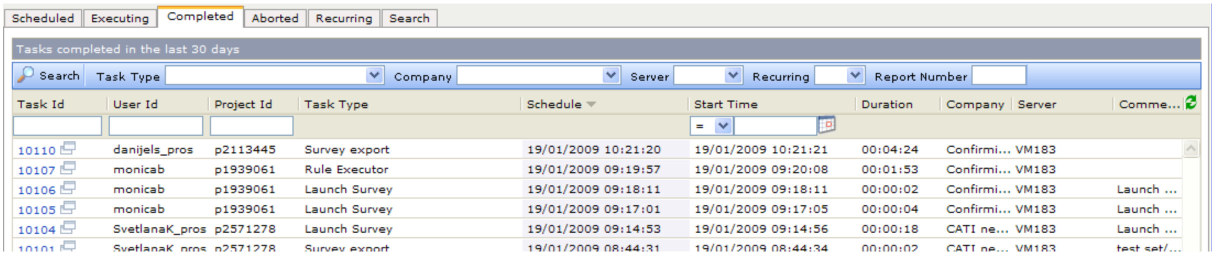
Save

Description	Isolation Level	Max Instances	Weight	ID
Activity Log Export	Process	4	10	26
Archiving	Thread	1	10	15
Ascribe Codeframe Import	Thread	1	20	103
Ascribe Export	Thread	1	20	47
Batch Emailing	Thread	4	20	4
Batch Emailing - Dedicated IP address	Thread	4	20	68
Batch Emailing - Fixed Domain	Thread	4	20	72
BitStream Generator	Thread	1	10	40
Bulk Assignments Upload	Thread	1	10	99
Community Portal Export	Thread	3	10	55
Community Portal Import	Thread	3	10	56
Community Portal Publish	Thread	3	10	51
Configuration Settings Export	Thread	1	10	50
Create and Process Cube	Thread	1	10	95

Figure 6 The top few tasks in the Task Type Configuration page

4.4. Admin > Batch > Tasks

Go to the **Admin > Batch > Tasks** menu command to open the Task Management page (also available through **Home > Tasks**). Software Administrators have access to all batch tasks on the server. The layout is identical for all the tabs.



Scheduled | Executing | Completed | Aborted | Recurring | Search

Tasks completed in the last 30 days

Search | Task Type | Company | Server | Recurring | Report Number

Task Id	User Id	Project Id	Task Type	Schedule	Start Time	Duration	Company	Server	Comme...
10110	danijels_pros	p2113445	Survey export	19/01/2009 10:21:20	19/01/2009 10:21:21	00:04:24	Confirmi...	VM183	
10107	monicab	p1939061	Rule Executor	19/01/2009 09:19:57	19/01/2009 09:20:08	00:01:53	Confirmi...	VM183	
10106	monicab	p1939061	Launch Survey	19/01/2009 09:18:11	19/01/2009 09:18:11	00:00:02	Confirmi...	VM183	Launch ...
10105	monicab	p1939061	Launch Survey	19/01/2009 09:17:01	19/01/2009 09:17:05	00:00:04	Confirmi...	VM183	Launch ...
10104	SvetlanaK_pros	p2571278	Launch Survey	19/01/2009 09:14:53	19/01/2009 09:14:56	00:00:18	CATI ne...	VM183	Launch ...
10101	SvetlanaK_pros	p2571278	Survey export	19/01/2009 08:44:31	19/01/2009 08:44:34	00:00:02	CATI ne...	VM183	test set/...

Figure 7 Example of the Batch > Tasks list

In the event the list is extensive, you can search using the fields above the list and sort the list by clicking the appropriate column header. For statuses Aborted and Completed, only the last week's (7 days) tasks are displayed.

To view the Rule Executor page for a task, click on the blue Task ID link for that task. The window opens as shown below:

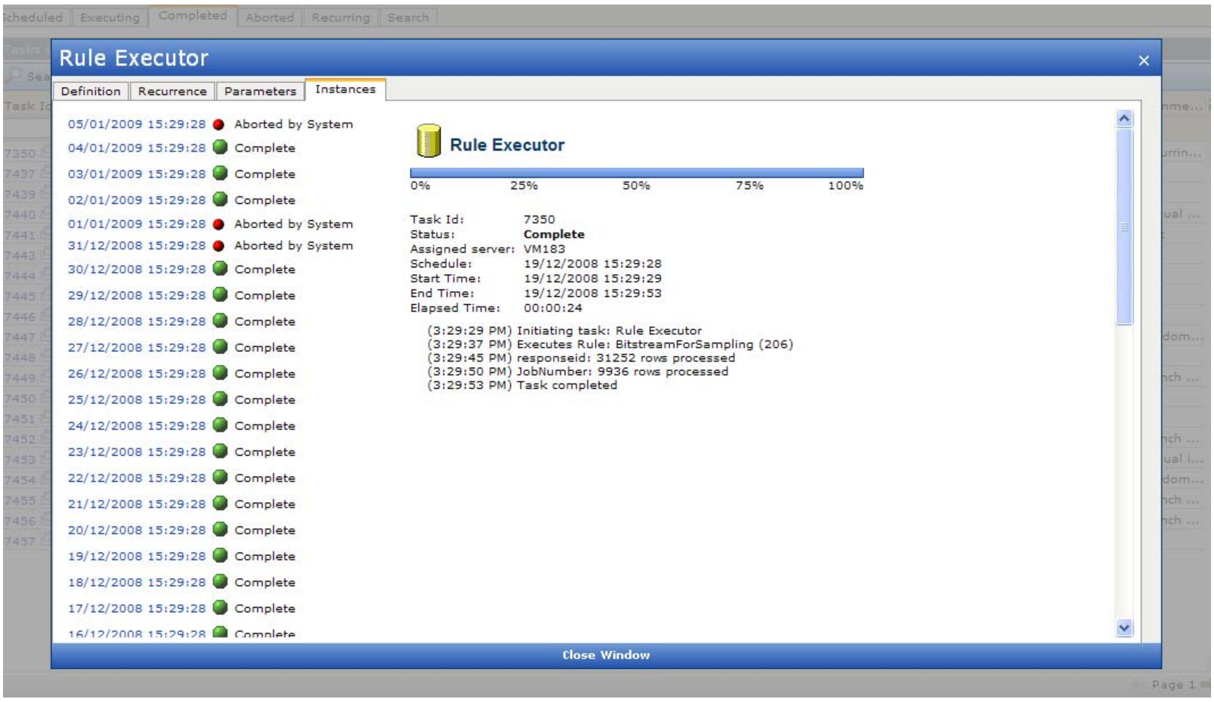


Figure 8 Example of the Rule Executor window for a task

4.4.1. How to Change Task Ownership

All tasks have a specified “owner”; in most cases the user who originally created the task. However, users can expire or be deleted, and if a task previously created by a now-expired/deleted user attempts to run then the task will abort. In this case, the administrator has the option of changing the task’s owner.

Note: To change a task owner, the administrator must have task_admin, system_admin, system_project_admin or project_admin permission. Users with other permissions will not see the Ownership tab.

1. Go to the **Home > Tasks** menu command.

   The Task Management page opens.

2. Click on the blue **Task ID** link for the appropriate task to go to the Task Definition page.

   The Task Definition page opens at the Instances tab.

3. Go to the Definition tab.

   Note that the page header text displays the type of task.

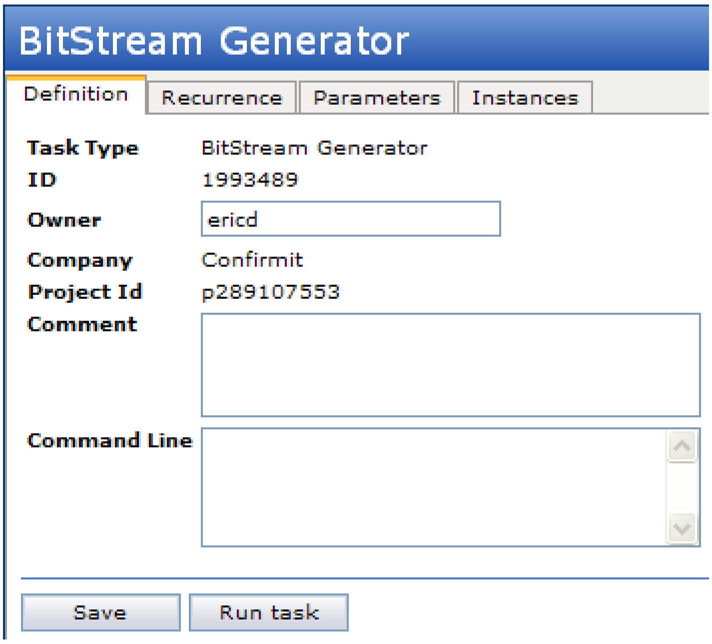


Figure 9 The Ownership tab

4. Type into the Owner field the UserID of the new task owner and click **Save** to save the changes.

All future occurrences of the task will be run under the new owner's credentials.

4.5. Admin > Batch > Task System Cleanup

This menu command runs a task that deletes any temporary files that may have been left in the system by other tasks. You can set the task to run as soon as possible, or later at a specified date/time. Scheduling the task to run later gives you the option of making it a recurring task.

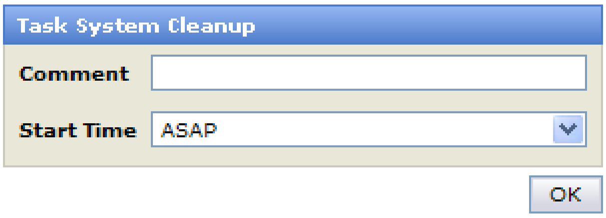


Figure 10 The Task System Cleanup dialog

5. Admin > Activity Logs

The **Admin > Activity Logs** menu contains the following options:

- Author Monitor
- Express Monitor
- CAPI/Kiosk Activation
- File Library Report
- Survey Monitor
- Reportal Monitor
- Web Service Monitor
- System Activity
- Log Reporting
- Error Log
- Email Activity Log
- Transaction Log
- Multimode Log
- CATI Management Activity
- CATI Interview Activity
- Extensions Monitor

The Activity Logs menu options enable you to overview and control the Confirmit servers' CPU usage, and allow you the possibility to track the activities that have been executed on different projects. The Activity logs also enable you to find "problem projects" if the server is slow.

When using the ...Monitor pages, you must select a certain period of time for the search. Depending on the selected activity type, you may then either view each logged representation of the activity, or view the statistics for the activity grouped by either project id or user id. Note that all time filtering is based on UTC time.

If the statistics are of interest, you can also drill down within each represented project id or user id to view the statistics at different levels.

Other logs have different search fields as appropriate. After performing a search, click **Reset** to clear the search fields.

The ...Monitor pages also have an **Open in New Window** button located below the search fields beside the **Reset** button. Click this button to open additional search windows, enabling you to perform comparisons of the data for different search criteria.

5.1. Admin > Activity Logs > Author Monitor

Go to **Admin > Activity Logs > Author Monitor** to search for information about the Authoring server performance. The page contains fields for the search criteria that can be used: project ID, Web server, Company, and the time periods hourly, daily, weekly, monthly or yearly. Depending on the time period selected, search fields for hour, date, week or year are made available. The Group by field offers options depending on the time period selected, and the search result is grouped according to the selection made in this field.

During some operations, some pages could take a considerable time to run and could cause the operation to time-out. Pages that have been found to sometimes cause time-outs have therefore been defined as "Async", meaning that those pages support Asynchronous operations. Running those pages as Async allows them to run without timing out, but the resulting times may disturb the readings in the operation log. The Async field on the monitor page allows you to select whether or not the pages defined as Async are included in the calculations for the operation log. The options are:

- **No** – Async pages are not included in the log (default).
- **Yes** – only Async pages are included in the log.
- **Both** – all pages are included in the log.

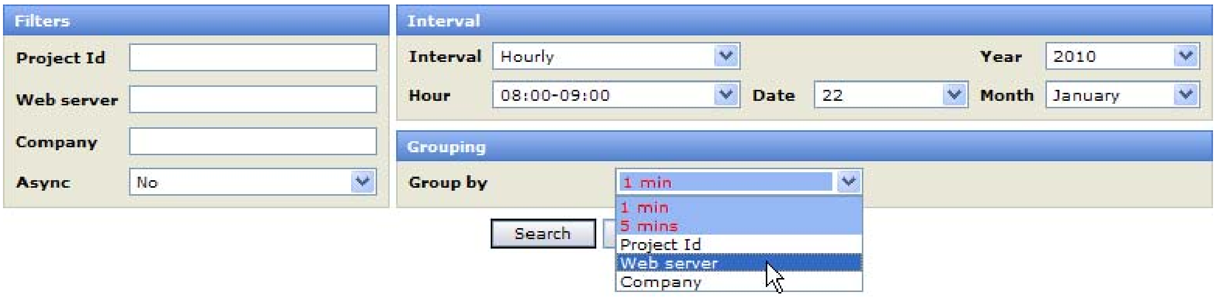


Figure 11 The Author Monitor page search fields

Add the appropriate search criteria, then click **Search** to display the information. The data is arranged according to the grouping selected (see the figure below). The information displayed is: number of hits, number of errors, average and sum of CPU total, CPU user code and Real total. Time is in milliseconds.

Grouping by Web Servers, for example, allows you to monitor the authoring server performance (see section 5.5. Admin > Activity Logs > Survey Monitor for more information).

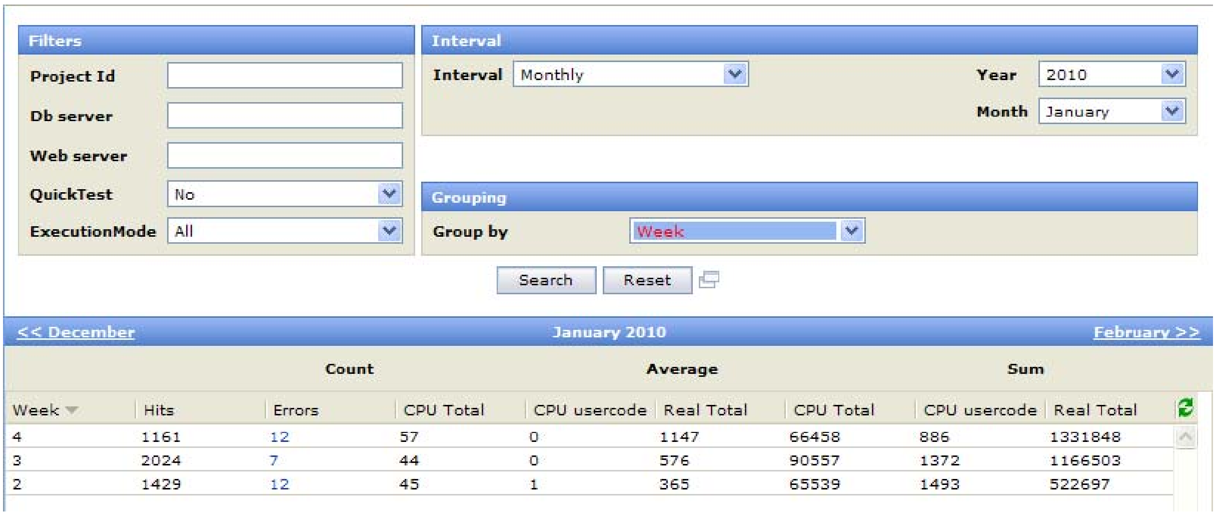


Figure 12 Example of an Author Monitor search result

Click the **Open in New Window** button (beside the **Reset** button) to open additional search windows.

5.2. Admin > Activity Logs > Express Monitor

Go to **Admin > Activity Logs > Express Monitor** to search for information about the Express server performance. The page contains the same fields and functionality as the Author Monitor described above.

5.3. Admin > Activity Logs > CAPI/Kiosk Activation

The CAPI/Kiosk Activation screen shows CAPI consoles that have been activated on the server. There are two modes to this screen, "Summary" and "Details". The Summary mode shows one line per physical machine.

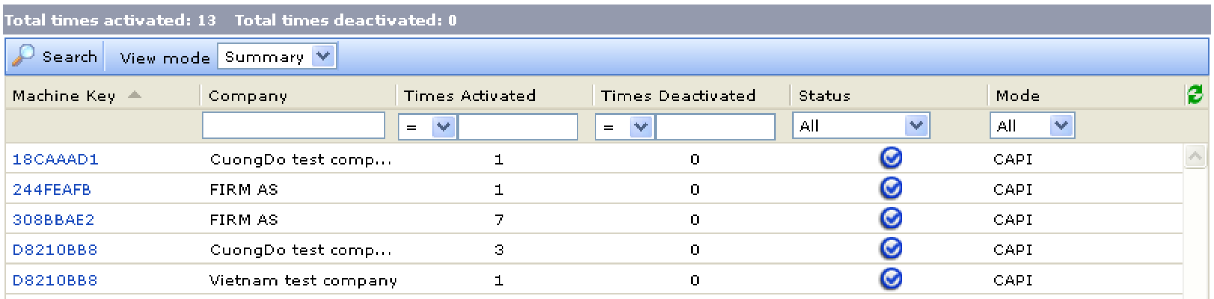


Figure 13 Example of the CAPI/Kiosk Activation page

The columns are as follows:

- **Machine key** – A physical machine is identified by its machine key (which is based on the hard-disk id on the particular machine). Click the link to get further details on the machine.
- **Company** – The company that has activated the machine.
- **Times activated** – The number of times this machine has been activated.
- **Times deactivated** – The number of times this machine has been deactivated.
- **Status** – Activated or Deactivated (it is deactivated if the number of "times activated" - "times deactivated" = 0)
- **Mode** – CAPI activation or Kiosk activation.

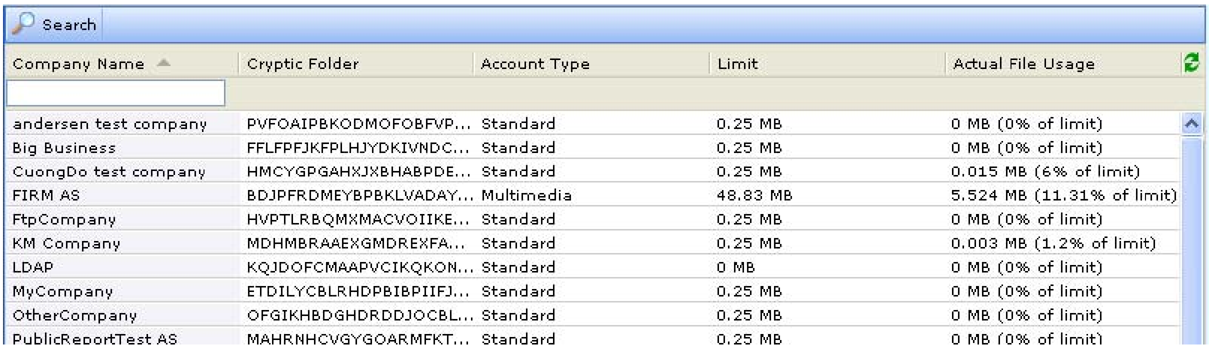
Note: The “Times Activated” for a machine can be greater than one, but one machine cannot support multiple consoles. If the user has not deactivated the inactive consoles, they will count as active licenses.

Click on a machine key to open the "Details" mode for that machine. Here you can see which consoles have been activated for this physical machine. You can also go directly to the Details mode by choosing Details in the drop-down. In the Details mode the information is presented one line per console (and each console does not have to be on a physical machine). The details are as follows:

- **Machine key** – A physical machine is identified by its machine key (which is based on the hard-disk id on the particular machine).
- **Company** – The company that has activated the machine.
- **Console Name** – The name of the console. The console is automatically named as Company name + a number.
- **Activated** – The time and date when the console was activated.
- **Deactivated** – The time and date when the console was deactivated. This field is blank for active consoles.
- **Mode** – CAPI activation or Kiosk activation.

5.4. Admin > Activity Logs > File Library Report

Go to **Admin > Activity Logs > File Library Report** to view a list of all companies that have the File Library add-on.



Company Name	Cryptic Folder	Account Type	Limit	Actual File Usage
andersen test company	PVFOAIPBKODMOFOBFVP...	Standard	0.25 MB	0 MB (0% of limit)
Big Business	FFLFPFJKFPLHJYDKIVNDC...	Standard	0.25 MB	0 MB (0% of limit)
CuongDo test company	HMCYGPGAHXJXBHABPDE...	Standard	0.25 MB	0.015 MB (6% of limit)
FIRM AS	BDJPFRDMEYBPBKLVADAY...	Multimedia	48.83 MB	5.524 MB (11.31% of limit)
FtpCompany	HVPTLRBQMXMACVOIIKE...	Standard	0.25 MB	0 MB (0% of limit)
KM Company	MDHMBRAAEXGMDREXFA...	Standard	0.25 MB	0.003 MB (1.2% of limit)
LDAP	KQJDOFCMAAPVCIKQKON...	Standard	0 MB	0 MB (0% of limit)
MyCompany	ETDILYCBLRHDPBIBPIIFJ...	Standard	0.25 MB	0 MB (0% of limit)
OtherCompany	OFGIKHBDGHDRDDJOCBL...	Standard	0.25 MB	0 MB (0% of limit)
PublicReportTest AS	MAHRNHCVGYGOARMFKT...	Standard	0.25 MB	0 MB (0% of limit)

Figure 14 Example of the File Library Report list

The list shows the Account Type a company has (Standard, Enhanced, Multimedia), the space limit granted to this company in MB, and how much of this space has been used, also in MB. (see section 6. Admin > Accounts for more information).

5.5. Admin > Activity Logs > Survey Monitor

Go to **Admin > Activity Logs > Survey Monitor** to open the Survey Monitor window. Here you can search for information about survey performance. There are search criteria fields for project ID, DB server and Web Server, and Quick Test and Execution Mode selection boxes. Select the time period Hourly, Daily, Weekly, Monthly or Yearly. Depending on the time period selected, search fields for entering hour, date, week or year are made available. The Group by field offers choices depending on the time period selected, and the search results are grouped according to the selection made in this field.

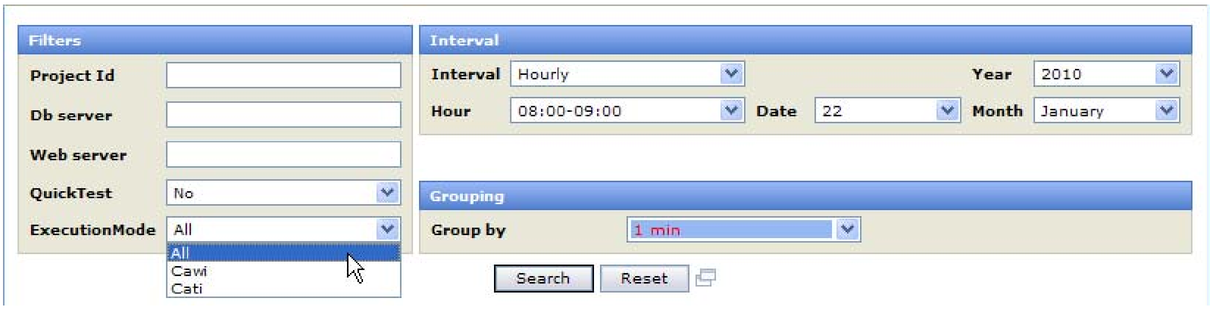


Figure 15 The Survey Monitor search fields

Add the appropriate search criteria, then click **Search** to display the information arranged by the grouping selected (see the figure below for an example). The information displayed is number of hits, number of errors, average and sum of CPU total, CPU user code and Real total. Time is in milliseconds.

If you select **Group by - Project**, the project ids are displayed. The project ids are links to a new table window with information about CPU usage by that specific project. If you click the project ID link on this page, you are sent to the **Project Management > Overview** page for this project. If you select Group by DB Server, then the values are displayed per database server.

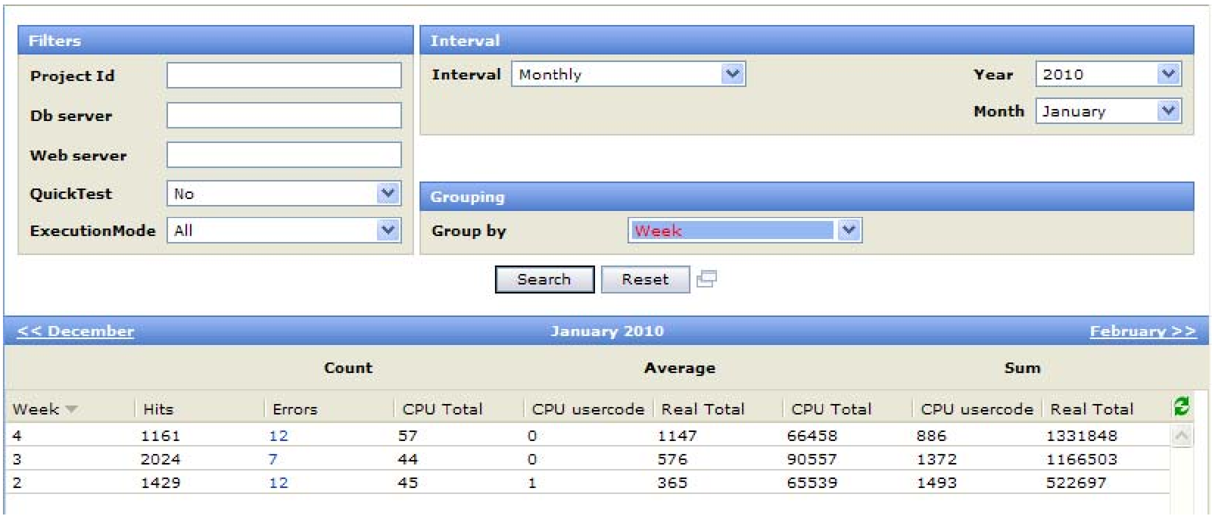


Figure 16 Survey monitor search result

Click on the column headers in the table to sort the information by that column. The columns are as follows:

- **Average CPU total** – Indicates how much time is spent by the web server(s) processing each questionnaire page (page hit). i.e. this is the system-generated load.
- **Average CPU user code** – Indicates how much of the CPU total time is spent by the web servers running user-made scripts per page hit. i.e. this is the user-generated load.
- **Average Real total** – Indicates the time used to complete the request per page hit. i.e. the total time spent waiting for disk IO, SQL server, network etc.
- **Sum CPU total** – Aggregated CPU time for page hits in the interval or per project.
- **Sum CPU user code** – Aggregated CPU time used on user-made scripts in the interval or per project.
- **Sum Real total** – Aggregated time used for completing the request per page hit. i.e. the total time spent waiting for disk IO, SQL server, network etc.

After performing a search, click **Reset** to clear the search fields. Click the **Open in New Window** button (beside the **Reset** button) to open additional search windows.

5.6. Admin > Activity Logs > Reportal Monitor

Go to **Admin > Activity Logs > Reportal Monitor** to open the Reportal Monitor window. Here you can search for information about report usage and performance. The fields available in the search window are described below.

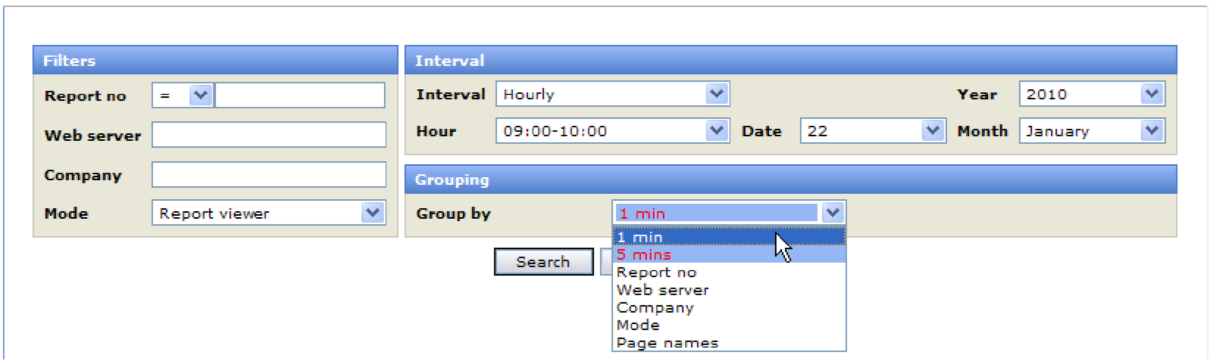


Figure 17 Reportal Monitor search fields

The fields are as follows:

- **Report no** – search for a specific report by its number, or search for reports with numbers higher or lower than the number entered in the field by using the operators in the drop down list.

- **Web server** – if more than one web server is installed, enter one server in the search field.
- **Company** – enter the company of the Confirmit user who has created the reports in the search.
- **Cached** – this is a drop down list with Yes and No alternatives. This enables the search result to include only cached reports or to include only not cached reports.
- **View mode** – a drop down list with Yes and No alternatives. There are two modes in Reportal: View Mode and Design Mode. View mode counts only the reports accessed by end users with View access. If you choose Yes in the drop-down, only transactions generated by end user Viewers will be shown. If you choose No, the transactions generated by Designers accessing the report, will also be included.
- **Interval drop-down list** – includes hourly, daily, weekly, monthly and yearly. Depending on the selected interval, search fields for hour, date, month and year are made available.
- **Grouping drop-down list** – includes the options report no, web server, cached, view mode, company and different time intervals, that depend on the selected interval for the search.

Click **Search** to open the result screen as shown in the figure below. The result columns are the same as those for the Survey Monitor, though related to reports (see section 5.5. Admin > Activity Logs > Survey Monitor for more information). After performing a search, click **Reset** to clear the search fields.

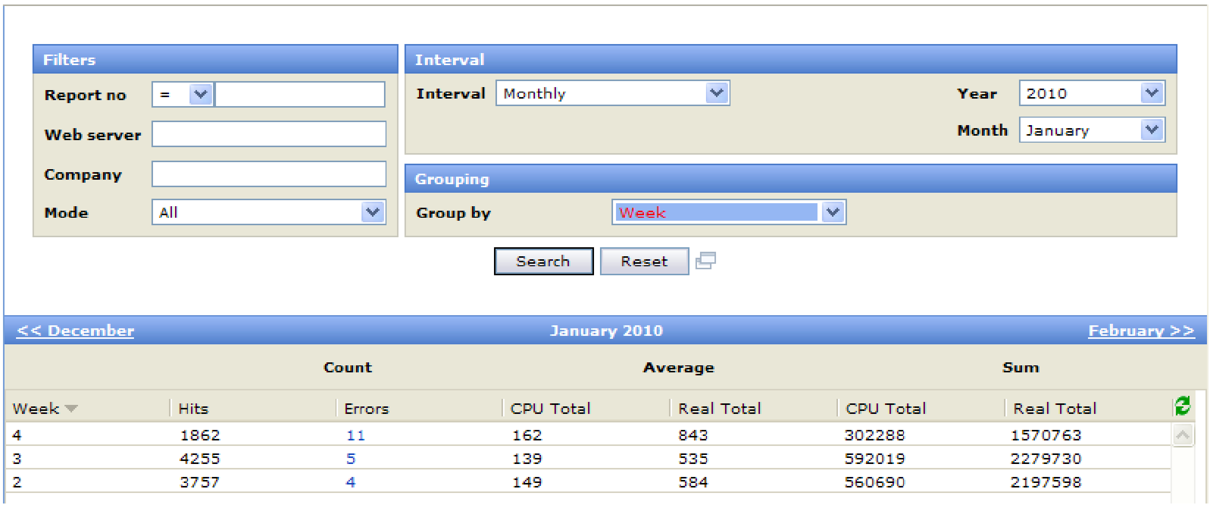


Figure 18 Example of the Reportal Monitor search result

Click the **Open in New Window** button (beside the **Reset** button) to open additional search windows.

5.7. Admin > Activity Logs > Web Service Monitor

The Web Service Monitor function monitors the traffic on Web Services, for example when applications built on API .Net platforms access Confirmit's web services.

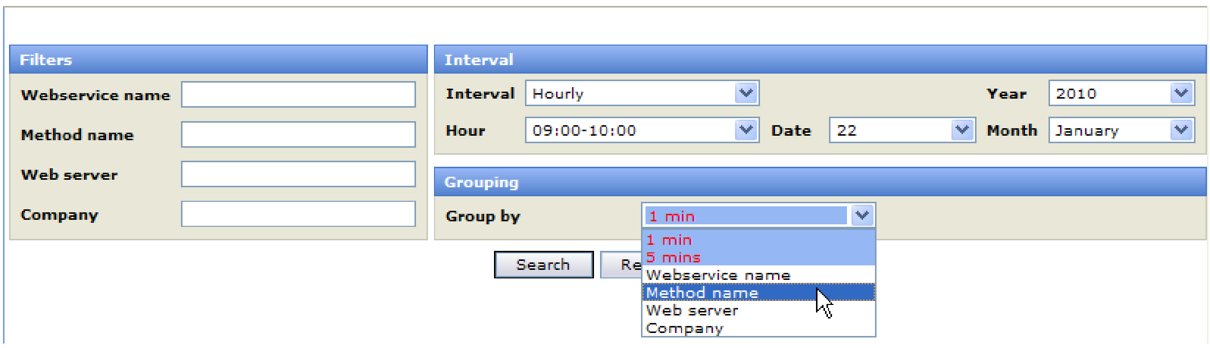


Figure 19 The Web Service Monitor

The monitor's functions and interface are very similar to the other system monitors. See those sections for more information.

5.8. Admin > Activity Logs > Community Portal Monitor

The Community Portal Monitor function monitors the traffic on a community portal.

Figure 20 The Community Portal Monitor

This monitor's functions and interface are very similar to those of the Survey monitor. See that section for more information.

5.9. Admin > Activity Logs > System Activity

This functionality enables you to track the use of all transaction types in Confirmit. Go to **Admin > Activity Logs > System Activities** to open a search form. In this window you can:

- Search for activities in a specific time period: yearly, monthly, weekly, daily, hourly.
- Filter the search on Company, Activity type, Project ID, Project name and/or Project creator. Enduser list, Enduser company, and Enduser user fields will appear only when you select "Published report accessed", "Pivot view accessed", or "Individual report accessed" in Activity type.
- Sort the result by four different levels ("Group by – then by – then by – then by").

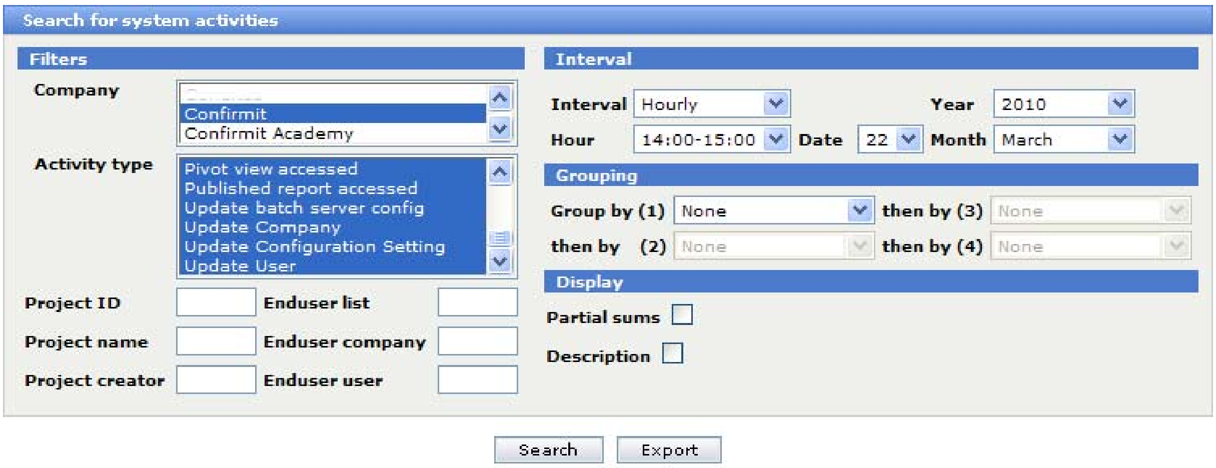


Figure 21 System activity search fields

You can select a time interval for the search in the Interval search area of the page.

You can select a specific company and/or a specific project or all companies and all projects. To select an item click on it with the left mouse button to highlight it. If nothing specific is selected when you click search, all companies/clients and all projects are selected.

The Company and Activity type fields are multiple-choice fields, that is, you can run a search for several companies and activities simultaneously. The Activity types that you can search for are:

Cache settings changed – this refers to cache settings for reports in Reportal	Interview Screened – CAWI	Account locked
Clear responses	Interview Small	Change Password
Create project	Interview Unknown – CAPI	Complete – Registration Survey
Data cleaning delete	Interview Unknown – CAWI	Delete Company
Data cleaning update	LDAP	Delete User
Delete current response	Login event	Email sent
Delete project	Open report generated	Failed Login
Duplicate project	Reportal export	Individual report accessed
Index created	Respondent Report PDF Export	New Company
Interview complete – CAPI	System Admin Login	New user
Interview complete – CAWI	Office report generated	Pivot view accessed
Interview Medium	Office report node generated	Published report accessed
Interview Mini	Publisher report generated	Update batch server config
Interview Quota Full – CAPI	Publisher report node generated	Update Company
Interview Quota Full – CAWI	Generation-time of online report	Update Configuration Setting
Interview Screened – CAPI	Generation-time of pivot view	Update User

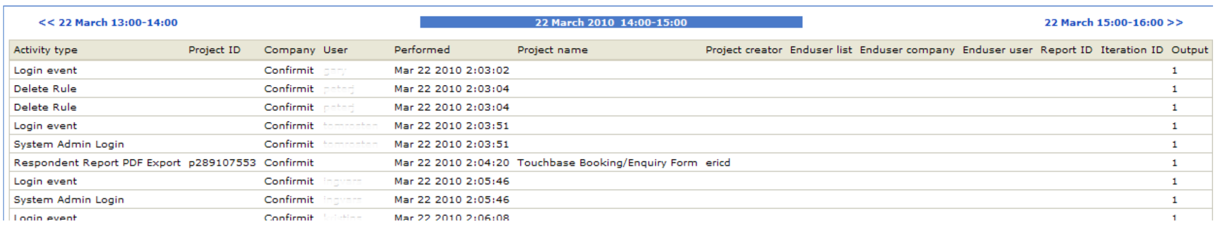
Check the Description box to show Description in the activity results. This presents a detailed description of what was performed in the activity (for example, server.setting: old value -> new value).

Depending on the data that is logged for each activity type, you may have the possibility to group the results. Not all group alternatives are allowed for all activities. If an illegal selection is made, a message appears with information regarding this. In the list box “Group by” there are five permanent options: None, Project, User, Company, Enduser list, Enduser company, and Enduser user. And depending on the search time interval, you will be able to group by more detailed intervals.

Note: Not all searches may be successful. In cases when you receive a Timeout expired message, try to break down your search, for example into smaller time intervals.

5.9.1. Result Window - System Activities

Set the appropriate period, filter and group settings and click **Search** to open a page with the results. The results page will display various different kinds of data depending on the search settings used. The example in the figure below shows the results for all activity types , grouped by Company for the interval 14:00 to 15:00 on 22 March 2010. The search was defined for a specific hour, but you can view the previous and next hours by clicking the **<<** and **>>** buttons.

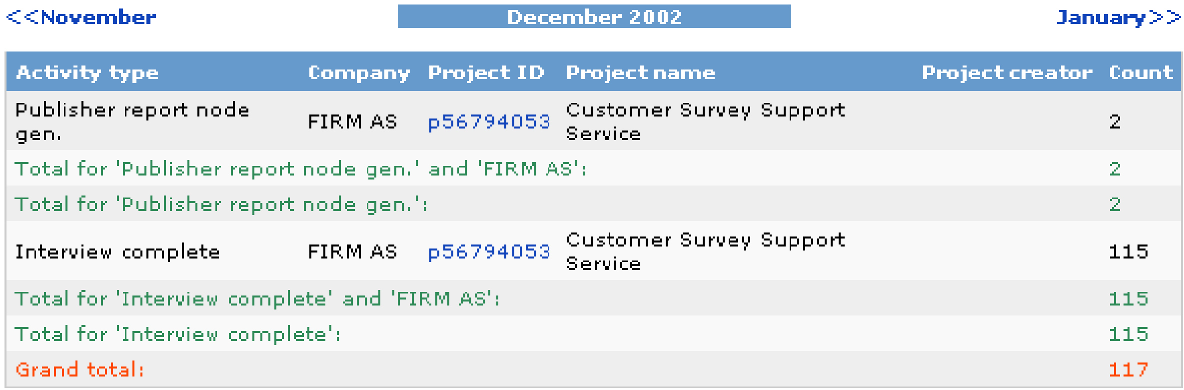

<< 22 March 13:00-14:00 22 March 2010 14:00-15:00 22 March 15:00-16:00 >>

Activity type	Project ID	Company	User	Performed	Project name	Project creator	Enduser list	Enduser company	Enduser user	Report ID	Iteration ID	Output
Login event		Confirmit	gary	Mar 22 2010 2:03:02								1
Delete Rule		Confirmit	peterj	Mar 22 2010 2:03:04								1
Delete Rule		Confirmit	peterj	Mar 22 2010 2:03:04								1
Login event		Confirmit	tomrosten	Mar 22 2010 2:03:51								1
System Admin Login		Confirmit	tomrosten	Mar 22 2010 2:03:51								1
Respondent Report PDF Export	p289107553	Confirmit		Mar 22 2010 2:04:20	Touchbase Booking/Enquiry Form	ericd						1
Login event		Confirmit	ingvars	Mar 22 2010 2:05:46								1
System Admin Login		Confirmit	ingvars	Mar 22 2010 2:05:46								1
Login event		Confirmit	kristine	Mar 22 2010 2:06:08								1

Figure 22 Example of a system activity search result

In this example, the result page shows that there were 115 complete responses for this project in December 2002 and that two Publisher Report Nodes had been generated.

If you check the **Partial sums** checkbox in the Search window, the result shown in the figure above will be displayed with Totals for each activity and a Grand total, as shown in the figure below.



<<November | December 2002 | January>>

Activity type	Company	Project ID	Project name	Project creator	Count
Publisher report node gen.	FIRM AS	p56794053	Customer Survey Support Service		2
Total for 'Publisher report node gen.' and 'FIRM AS':					2
Total for 'Publisher report node gen.':					2
Interview complete	FIRM AS	p56794053	Customer Survey Support Service		115
Total for 'Interview complete' and 'FIRM AS':					115
Total for 'Interview complete':					115
Grand total:					117

Figure 23 The same system activity search result but with Partial Sums checked

To export the search result, click the **Export** button in the search window and follow the instructions. The results are exported to tab-delimited ASCII files.

5.9.2. Granularity Window - System Activities

To open the Granularity window, click the hyperlink of either a project id or user id. The default granularity is “Pr. hour”, meaning that the number of occurrences per hour within the actual time period is displayed. The picture below shows the details of the user “User”.

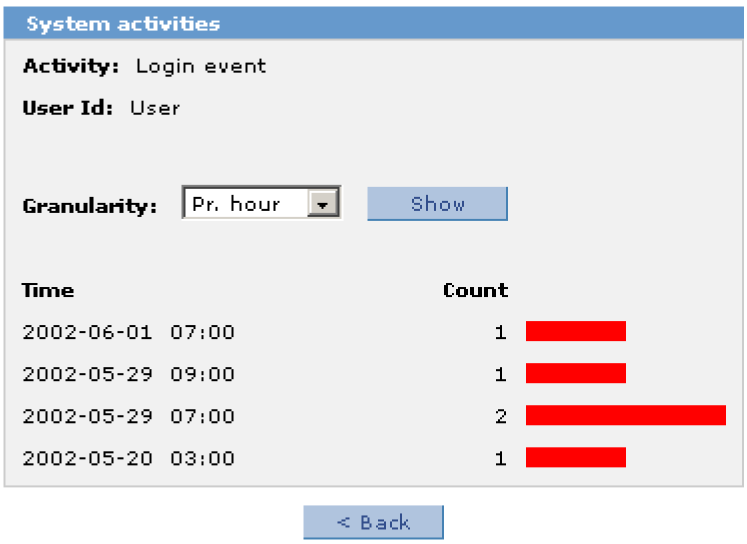


Figure 24 The System activities Granularity window

To change the granularity:

1. Select the required granularity from the list box “Granularity”.
2. Click **Show**.

   The “Granularity” list box has the following options:

   - Pr. hour

  - Pr. day
  - Pr. week
  - Pr. month

3. Click **Back** to return to the result window from which you first followed the hyperlink.

5.9.3. Step-by-Step Instructions

To summarize the stages in a report:

1. Go to the **Admin > System activities** menu command.
2. Select the time period.
3. Select the activity type.
4. Select the grouping.
5. View the results of the search.
6. Export the results.
7. Follow the hyperlink for project, user, month or company.
8. Change granularity.
9. Click the **Back** button.

5.10. Admin > Activity Logs > Log Reporting

The following sections describe the functionality associated with the Log files.

5.10.1. The Purpose of Logs

Logs give the Software Administrator an overview of usage, and they allow Confirmit to receive transaction data from customers according to contractual commitments. Logs are to be sent to Confirmit on a monthly basis, on one of the first days of the new month to report for the preceding month.

5.10.2. How to Order a Log

1. Go to the **Admin > Activity Logs / Log Reporting** menu command.

   The Export of aggregated activities dialog opens as shown in the figure below.

2. Choose the Month and Year for the desired log, and set the Mail-to address as required. Default is the logged-in user - you.
3. Click **OK**.

   An encrypted XML file is sent to the specified email address.

   A log can be ordered to any email address using the same procedure (assuming that e-mail rules in your company allow that). If you wish to include a report in clear text (that is readable), check the Include a readable report box.

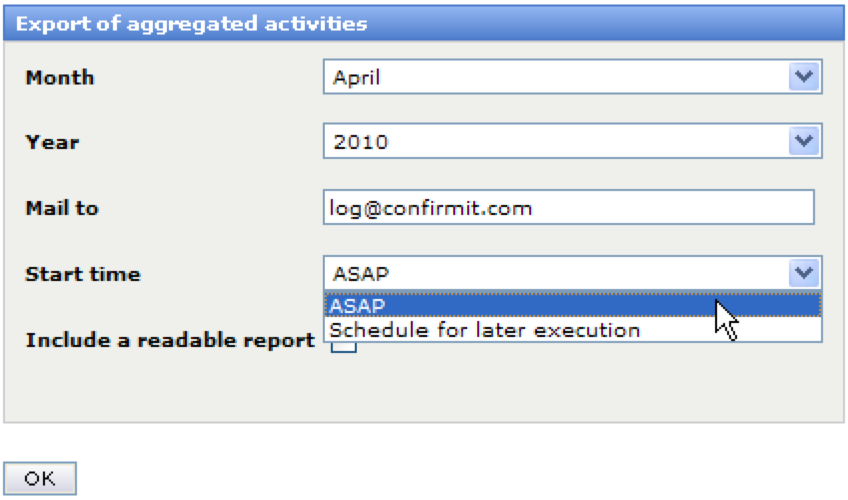


Figure 25 Log reporting

5.10.3. How to Set Up a Repeated Task

To set up a repeated task, or schedule the log to be sent at a later time, proceed as follows:

1. Go to the **Admin > Activity Logs > Log Reporting** menu command.

   The Export of aggregated activities dialog opens as shown in the figure above.

2. Choose the Month and Year, but keep the default "Mail to" address.

3. Click the down-arrow beside the Start time field to open the drop-down list, then select **Schedule for later execution**.

4. Click **OK**.

   The Recurrence Pattern dialog opens.

5. Set Recurring Task to **Yes**.

   A number of additional options become available. Make the required settings. As an example, the following settings will ensure monthly transmission of the required information, starting at 05:00 on 20th April 2010, and repeating thereafter at the same time on the 1st day of each month until October.

   - Click the date picker icon beside the date field under New Start Time, and select the date you want to start the task (**20.04.2010**).
   - Set the time (**05:00**).
   - Set Recurring task to **Yes**.
   - Click the date picker icon beside the End By field, and select the date you want the task to stop (**01.10.2010**).
   - Set Recurrence pattern type to **Monthly** .
   - Set Monthly Schedule to Day **1** of every **1** month(s).

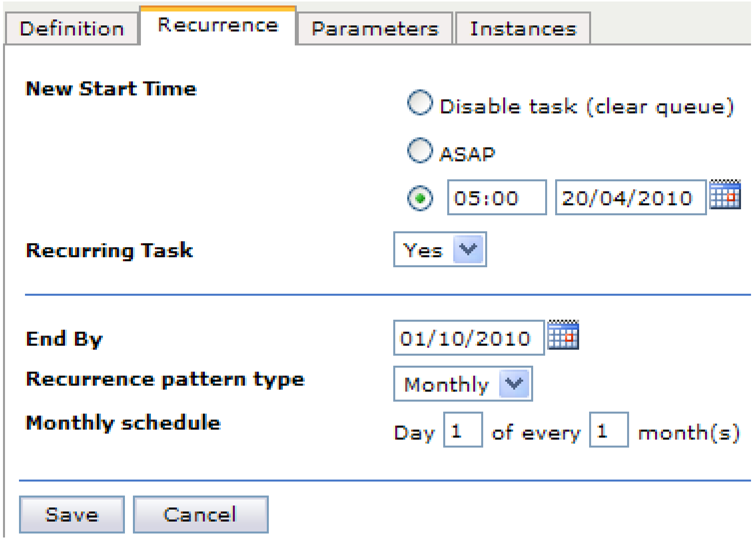


Figure 26 Setting Log reporting as recurring task

12. Click **Save** to save the settings.

Note: If a user sets up a recurring task and at some point in the future while the task is still running the user's ID expires, the task will be "Aborted by the system". The following error message will then be written to the task log - "Your account has expired. Please contact your system administrator." For assistance, contact Support. The system administrator can also change "ownership" of the task – see the next section.

5.10.4. Content of the Log File

The mail generated by the system on the Software Administrator's request will include one encrypted XML file and, if the "Include a readable report" option is selected, a readable XML file. This allows you to check the transaction information before sending it to Confirmit. Once received, the file will be decrypted by Confirmit.

The file contains the following information:

1) addon_<company>_<date>

List of companies having been granted access to Add-ons

addon_idaddon_companyidcompany_name

11Confirmit Company

etc

2) list_<company>_<date>

Number of report-accesses granted pr user company list on the server

ListCompanyNumber of users

Confirmit Company ASPConfirmit Company7

etc

3) users_<company>_<date>

List of the User IDs on the server

CompanyUserCreatedExpires

Confirmit Company ASOveH1998.10.242001.12.31

etc

4) aggregated_<company>_<date>

5) activitytype_<company>_<date>

The encrypted files include the number of Transactions / Hits. Given that no attempt has been made to tamper with the transaction data, the content of the files will match the numbers displayed in the email On-Screen message.

5.11. Admin > Activity Logs > Error Log

This menu command takes you to the **Home > Tasks** page **Aborted** tab, and displays the last 30 day's entries on the error log for batch jobs. The Task ID is a link to the properties and log of a specific task that enables you to investigate the error further.

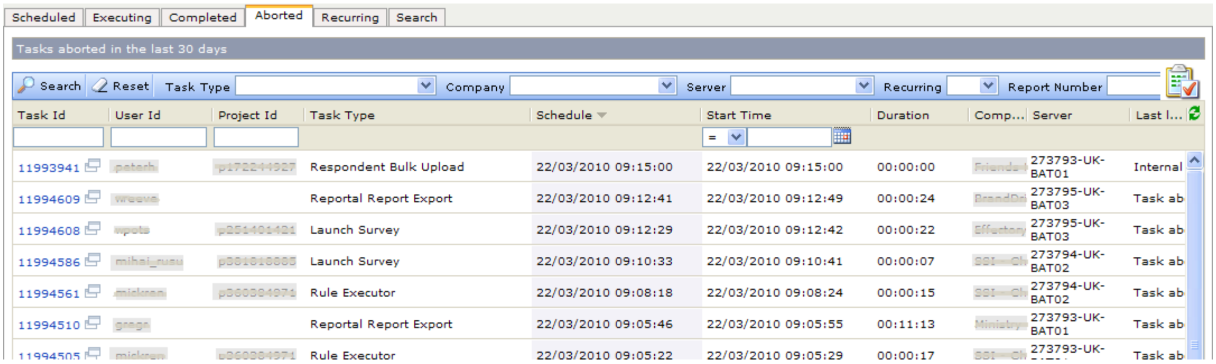


Figure 27 Example of the Error log

5.12. Admin > Activity Logs > Email Activity Log

Company Administrators and System Administrators have access to the **Email Activity Log**. This report shows the number of emails sent for the current company per month. The report can be grouped by date, weekday, week, quarter or all.

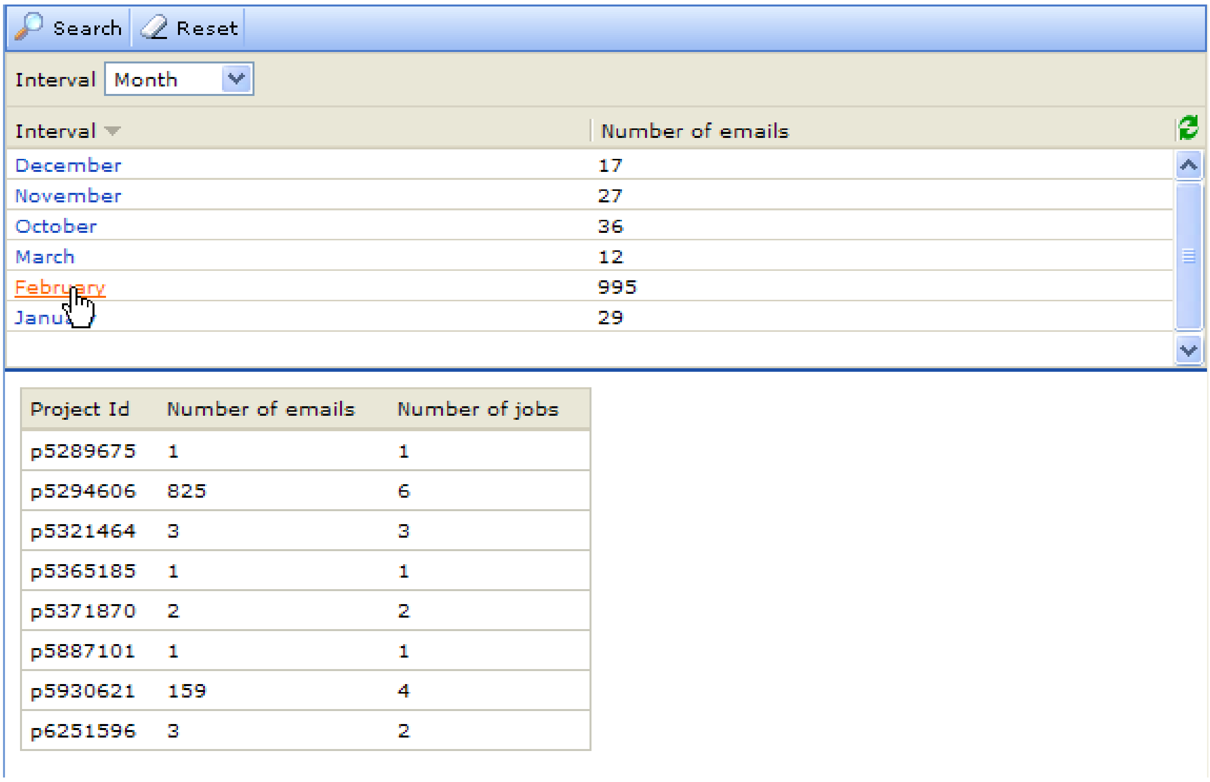


Figure 28 Example of the Email Activity Log for February

5.13. Admin > Activity Logs > Transaction Log

Provides a list of the transaction logs available to your company.

1. Click on a blue **Name** link to open that log.

   The Transaction Log Detail page opens at the General tab. This tab shows information about the log, such as who created it and when.

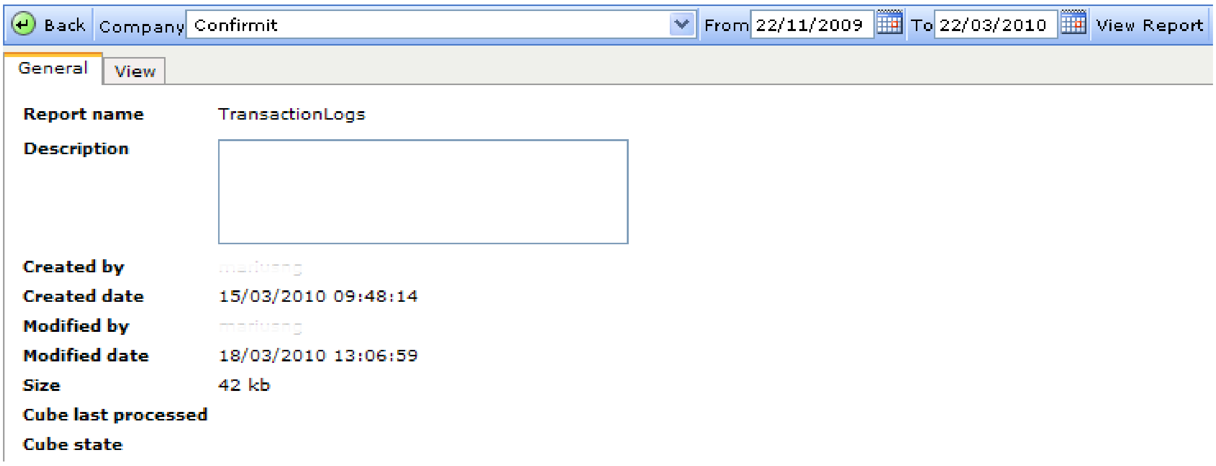


Figure 29 Example of the Transaction Log Details page General tab

   The Company field lists all the companies to which you have access.

2. Click the down-arrow and select the company you are interested in.
3. Select the dates for the period for which you wish to view the transactions.
4. Go to the View tab to view the transactions.

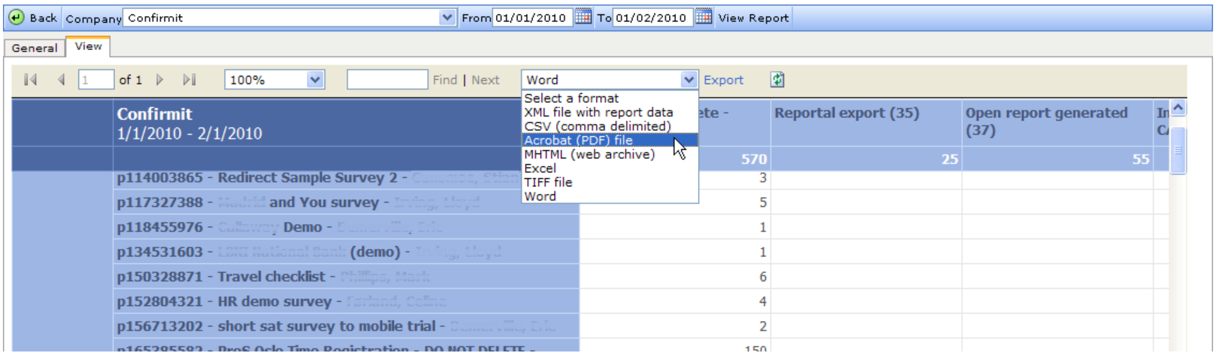


Figure 30 Example of the Transaction Log Details page View tab

If you change the dates or company, click **View Report** to update the information displayed.

If you wish to export the report, select a format to export it to, then click the **Export** button. A standard download Open/Save dialog opens. Click as appropriate and view/save the export file.

5.14. Admin > Activity Logs > Multimode Log

Go to **Admin > Activity Logs > Multimode Log** to search for information about multimode event activity. Add the appropriate search criteria, then click **Search** to display the information.

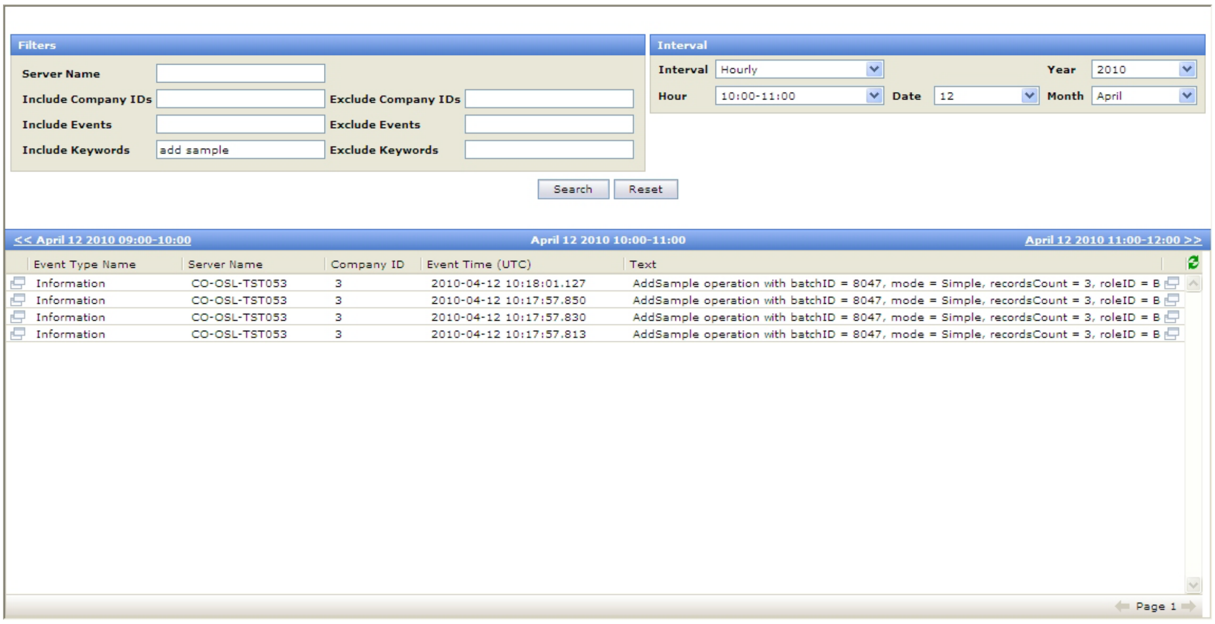


Figure 31 Example of the results of a Multimode search

Note that you can add more than one company ID to the Include and Exclude Company IDs filter fields. Separate the IDs with a space.

5.15. Admin > Activity Logs > CATI Management Activity

Go to **Admin > Activity Logs > CATI Management Activity** to search for information about CATI management activity. Add the appropriate search criteria, then click **Search** to display the information.

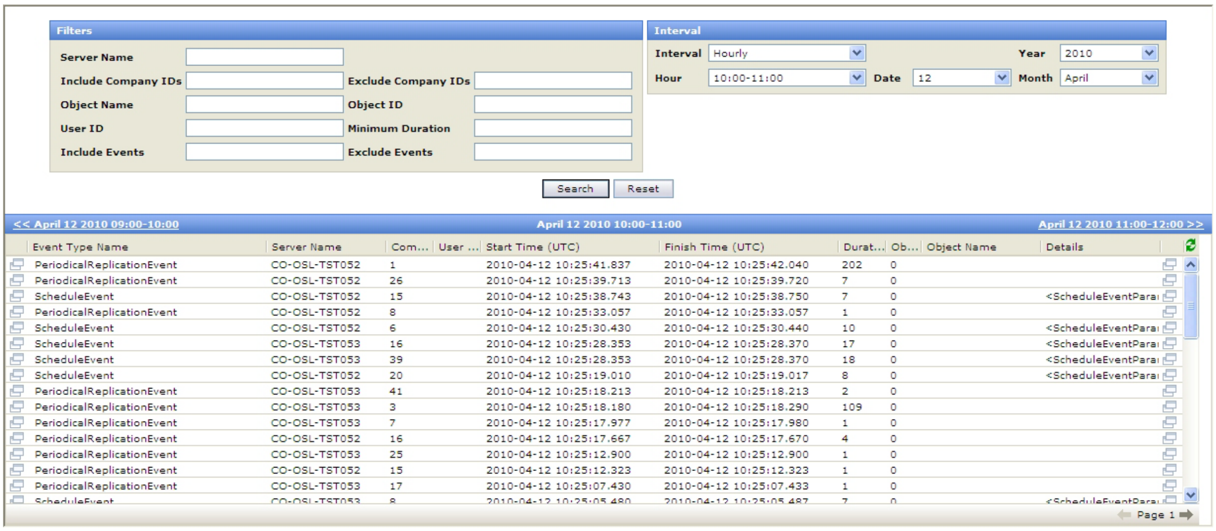


Figure 32 Example of the results of a CATI Management Activity search

5.16. Admin > Activity Logs > CATI Interviewer Activity

Go to **Admin > Activity Logs > CATI Interviewer Activity** to search for information about CATI interview activity. Add the appropriate search criteria, then click **Search** to display the information.

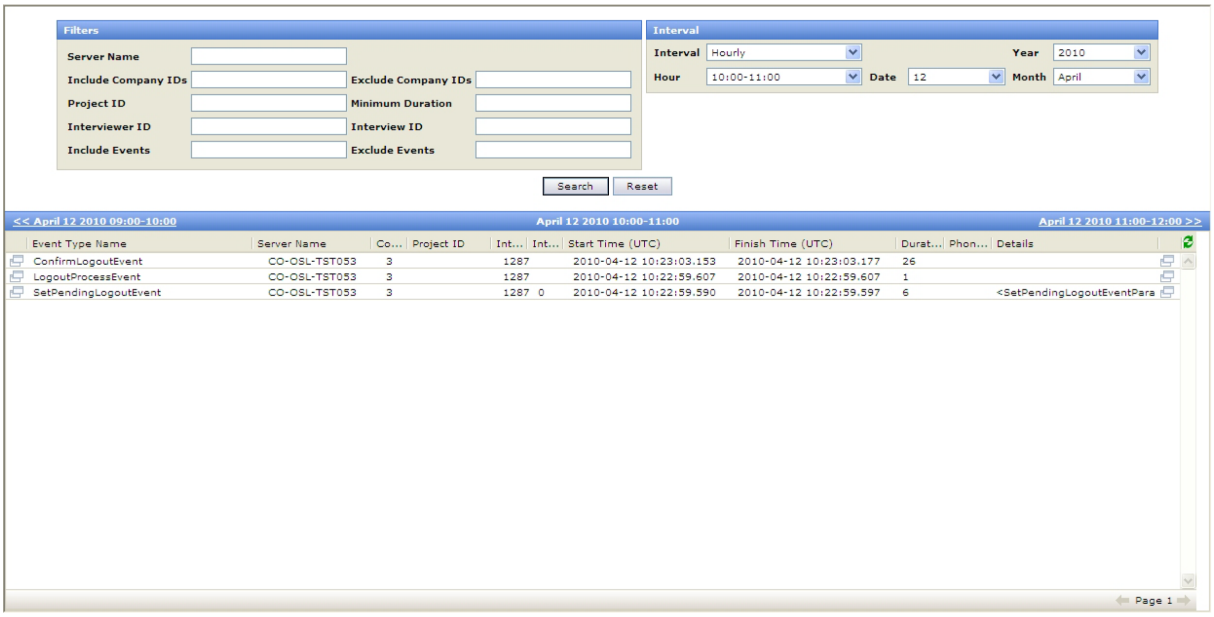


Figure 33 Example of the results of a CATI Interviewer Activity search

6. Admin > Accounts

Note: To be able to add new, and edit or delete existing users, groups and companies, the Confirmit administrator needs the permission "system_account_administrate". The Confirmit administrator called "administrator" (username "administrator") is the only administrator by default, who can give other Confirmit administrators this permission. It is recommended that the system_account_administrate or system_adminstrate permission is granted to another user, and that the password for the administrator account is changed as soon as possible after an installation, to avoid unwanted entry by unauthorized users. Once a replacement administrator has been set up, the original administrator can be set with an expiry date in the past to prevent logons for the account. The administrator account cannot be deleted.

The **Admin > Accounts** menu command contains the following options:

- Users.
- Roles.
- Groups.
- Companies.
- Overview.

6.1. Admin > Accounts > Users

Go to the **Admin > Accounts > Users** menu command to display an overview of all registered users. By default, users are listed alphabetically by the user ID.

Figure 34 Example of the list of registered users

In this list you can search for and sort users by User ID, the user's first and last name, Company, license expiry date, and the date of Last Modification. In addition you can search for users by User Level type, Expiry Status, and the date the license was created.

For Created, Expires and Last Modified dates you can select the operators: Less than, less than or equal to, equal to, greater than, and greater than or equal to.

If your search returns more items than can fit on one page, use the Page arrows in the lower right corner to switch between pages and browse through the list. The default number of items displayed on one page is 50.

To sort the list by one of the columns, click on the column header. An arrow indicates in which direction the list is sorted; ascending or descending.

Click on the alphabet buttons across the bottom of the window to return users whose Userid starts with the letter that you clicked.

Use the User Level drop-down to select the user level by which you want to search. The default value is All users, meaning that all users are displayed. The other options are: Professional, Standard, Translator, and No Access.

Use the Expire Status drop-down to search for Active and Expired licenses.

To view a user's details, click on the User ID link. A new frame opens with the information towards the right side of the browser. To view the company's details, click on the Company link. Again a new frame opens towards the right side of the browser.

Click **Reset** to remove all search criteria and display the full list of users.

6.1.1. How to Create a New User

To add a new user to the system:

1. Go to the **Admin > Accounts > Users** menu command.

   The registered users list opens.

2. Click **New Users** in the upper right corner of the user overview window.

Note: If the new user is to be connected to a new company in Confirmit, this new company must be created BEFORE the new user is added (see section 6.4. Admin > Accounts > Companies for more information).

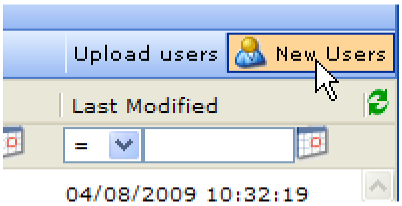


Figure 35 The New Users button

A new frame opens towards the right side of the browser. This frame contains fields for registering user details.

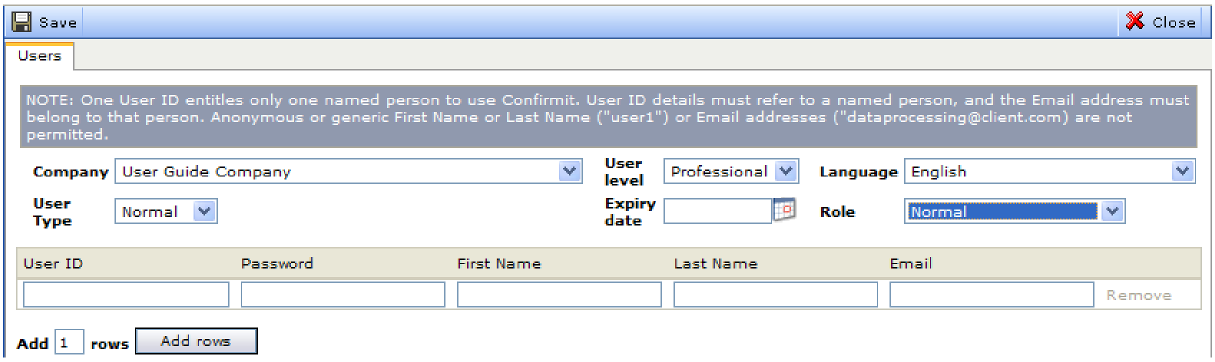


Figure 36 User details

Note: One User ID entitles only one named person to use Confirmit. User ID details must refer to a named person, and the e-mail address must belong to that person. Anonymous / shared names (for example "user1") or addresses (for example "dataprocessing@client.com) are not permitted.

3. Enter the appropriate information in all fields in the user registration window.
4. Click **Save**.

   All user settings are explained in the following sections.

To allow users to transfer PGP-encrypted files and data from Confirmit, their public PGP key must be set.

Note: PGP encryption is a payable add-on.

6.1.2. How to Add Several Users Simultaneously

In cases where several users with similar settings are to be created, you can create them in one operation.

1. Go to the **Admin > Accounts > Users** menu command.

   The Registered Users list opens.

2. Click **New Users** in the upper right corner of the window.

3. Enter the appropriate information in the fields.
4. In the Add field, specify the number of new users that are to be created.
5. Click **Add user**s.

   A number of rows equal to the number of users specified in the Add field are added to the list (see the figure below).
6. Edit the data fields for the new users.

Note: One User ID entitles only one named person to use Confirmit. User ID details must refer to a named person, and the e-mail address must belong to that person. Anonymous / shared names (for example "user1") or addresses (for example "dataprocessing@client.com) are not permitted.

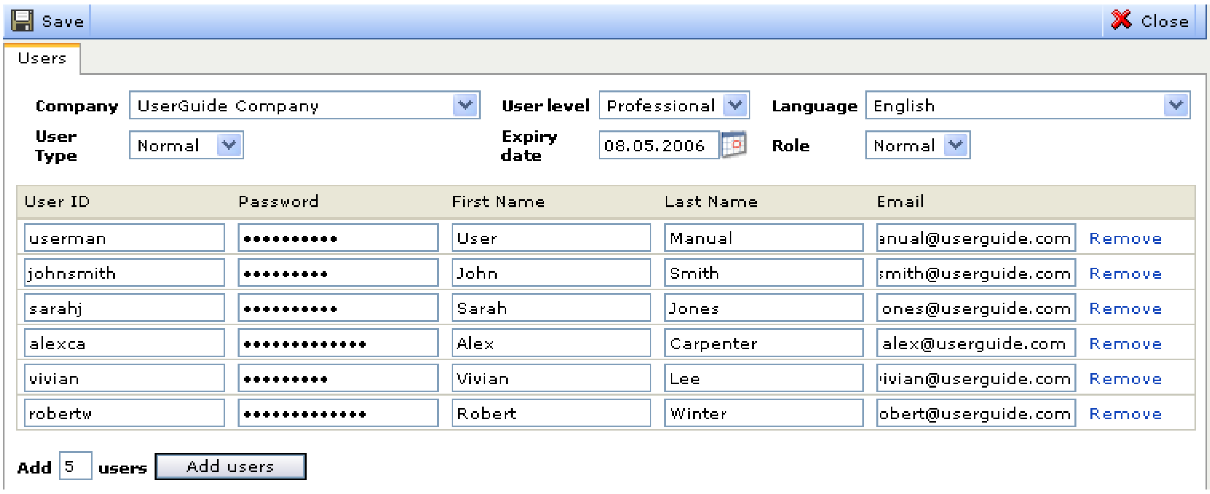


Figure 37 Example of the User Details for several users

7. When you have specified the details for all new users, click **Save** to save the settings.

   The page changes to show the list of users that were created in this operation (see the figure below).

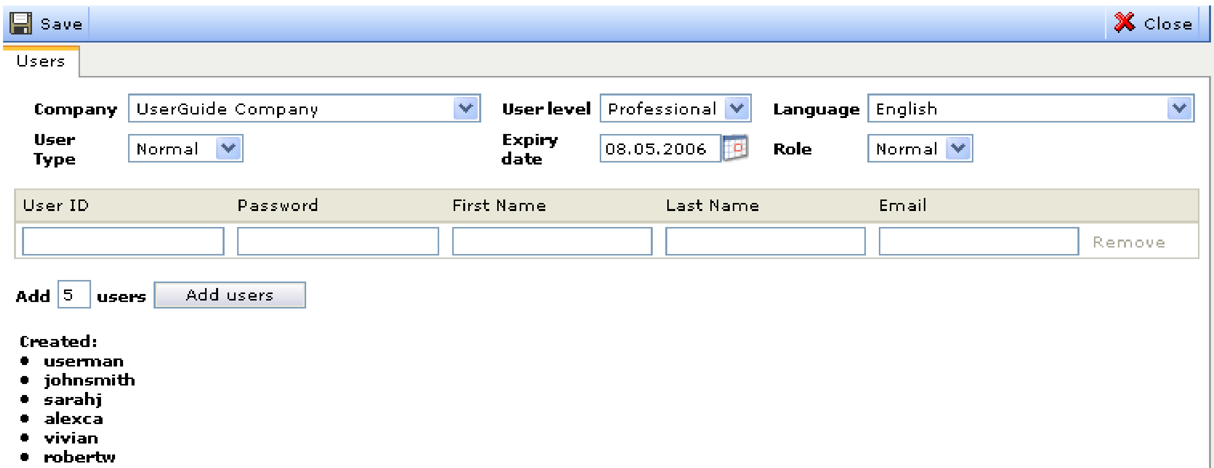


Figure 38 Example of the Created Users list

6.1.3. How to Edit a User's Details

If you need to edit a user's details or permissions:

1. Go to the **Admin > Accounts > Users** menu command to open the list of registered users.
2. Find and click the User ID link for the required user.

The Details page opens for the user as shown in the figure below.

3. Make the necessary changes (see section 6.1.3.1. User Details for more information).
4. Click **Save**.

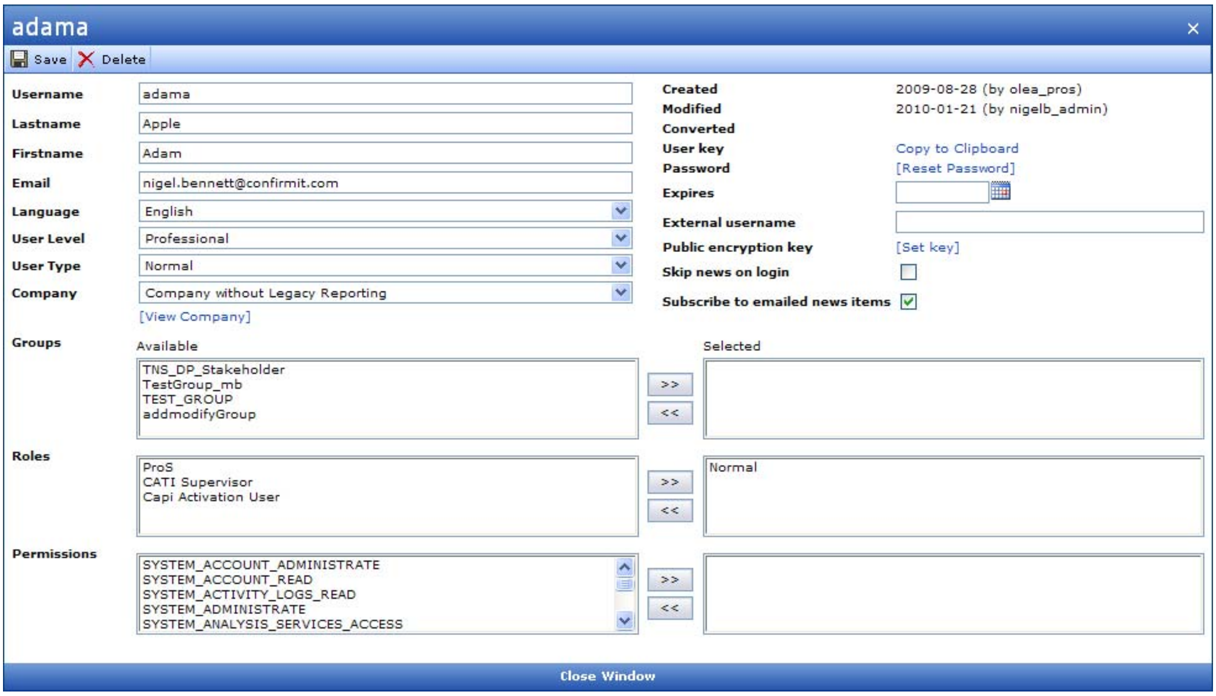


Figure 39 Example of the User Details page

6.1.3.1. User Details

The properties and settings on the User Details page are as follows:

- **Name** - the username of the user.
- **Lastname** - the user's last name.
- **Firstname** - the user's first name.
- **Email** - the user's email address. This is the address to which any error or system emails will be sent.

Note: User ID details must refer to a named person, and the e-mail address must belong to that person. Anonymous or shared names (for example "user1") or e-mail addresses (for example "dataprocessing@client.com) are not permitted.

- **Language** - the default language for this user. All surveys created by the user will have this language as the default. Select from the drop-down list.
- **User level** - the level of access this user is to have.
  - o **No access** - the user is registered but is not allowed to access Confirmit. This setting could be used to "switch off" users temporarily.
  - o **Translator** - the user is to work as a translator. The set of permissions is predefined and hard-coded in Confirmit so it is not possible to add or remove permissions for these users. These users will only have access to the Confirmit Translator Module. Refer to the Authoring User Guide for more information about the Translator module. The Translator user has the following permissions: system_translator_user_access.
  - o **Professional** - the "normal" level given to a Confirmit Professional user. Any permissions can be given (or not given) to a Professional user as required. See Groups, Roles and Permissions for a more detailed description of all permissions.
  - o **Express** - the user only has access to the Confirmit Express functionality. Refer to the Confirmit Express User Guide for further details.

- **User type** - specifies the type of user.
  - **Normal** - indicates that the user account is a standard licensed Confirmit user. This is for information only, for use by the administrator.
  - **Test** - indicates that the user account is set up for testing purposes. This is for information only, for use by the administrator.
  - **Training** - indicates that the user account is set up for training purposes. This is for information only, for use by the administrator.
  - **Solo** - applies only to Express users. A solo user does not require approval, and is limited to maximum 25 questions.
- **Company** - the company to which the user is registered.
- **Created** - the date and time when this user account was created.
- **Created by** - the username of the administrator who created this user account.
- **Modified** - if any changes have been made to the user's details after they were first registered, the date and time of the most recent changes is displayed here.
- **Modified by** - if any changes have been made to the user's details after they were first registered, the user name of the administrator who made the most recent changes is displayed here.
- **Converted** - if the user account type is changed, the date and time of the change is displayed here.
- **Key** - the User Key, unique to each user and generated automatically when the user account is first created. This key is required when adding users to your company's Permissions tab. Refer also to the Authoring User Guide for further details.
- **Password** - in the event the user's password must be changed, click the Reset Password link. (see section 6.1.6.1. How to Reset a User’s Password for more information).
- **Expires** - if this user's password is to expire on a certain date, type the year, month and day of the month into these fields. If the field is left empty, then the password will never expire.
- **External username** - used for the Single Sign-on (SSO) system (see section 13.6. The Single Sign-on Functionality for more information). This field should contain a combination of <company>_<username>, where company is a constant configured in SSO and username is the username the user has in the company server system and which is also provided through SSO. When a user logs on to his/her company's server using their username and password, as long as both the company and the username match the data in this field then the user will be able to access Confirmit without further login.
- **Public encryption key** - when the user's company has the PGP Encryption (encrypted data delivery) add-on functionality, this field becomes available (see section 6.1.6.3. Public Encryption Key for more information).
- **Skip news on login** - check this box if the user does not need (or wish) to have news items displayed when they log in to Confirmit.
- **Subscribe to emailed news items -** check this box if the user is to receive news items via email.

6.1.3.2. Groups, Roles and Permissions

A Group is a collection of users, while a Role is a collection of permissions. To simplify the setup, you can define user roles (see section 6.2. Admin > Accounts > Roles for more information) that you later assign to users instead of assigning new users permission by permission. Permissions control different focused sub-sets of Confirmit functionality.

In the fields for “Groups”, “Roles” and “Permissions” there is one field for available settings and one for the selected settings. To set permissions and roles for a user or to add a user to a group, the groups or permissions must be moved to the “Selected” field.

In the Available field, highlight the groups, roles, and/or permissions that you wish to allocate to the user and click the **>>** button. The selected items are moved across to the Selected fields and are allocated to the user.

To de-select groups, roles and/or permissions, highlight them in the Selected field and click the **<<** button. The selected items are moved across to the Available fields. See below for more information about the permissions.

The detailed permission structure gives the possibility to define various levels of users with differing permissions. It also allows restricting users from having access to all Confirmit functionality. For example, users can be set up to only have access to the Standard Designer and not to the Professional Designer or to not have access to Clear data or Data Editing functionalities, etc.

Most of the permissions also determine which Confirmit menus the user will see and have access to. The menus and areas to which the user does not have access, will in most cases not be visible to the user. In fewer cases the user will have read only access to functionality.

6.1.3.2.1. System Administration Permissions

- **system_account_administrate –** allows access to create, change and delete new companies, groups, roles and users.
- **system_account_read –** allows read access to account details.
- **system_activity_logs_read** – allows access to activity logs.
- **system_administrate** – is the main administrator permission in Confirmit. This gives access permission to all users and administrative functionality, and is the permission required when setting up Confirmit.
- **system_batch_administrate** – administrate batch server configuration and task type configuration.
- **system_CAPI_administrate** – allows access to generate the CAPI Activation files (see CAPI user guide for more information).
- **system_CATI_administrate** – allows access to view all surveys for the user's company in the CATI supervisor, independent of the presence/absence of the 'Supervise CATI project' survey level setting (see the CATI Supervisor guide for more information).
- **system_clear_production_data** - allows users with this permission to use the "Clear Data" option against the production database. Note that users without this permission will get a "Permission denied" message if they attempt to use the functionality, and that System Administrators do not need this permission. Note also that access to clear the test database does not need this permission.
- **system_db_administrate** – allows access to database administration, i.e. controlling which db server a project database should be stored in.
- **system_db_designer_administrate** – allows access to all forms and Database Designer.
- **system_development_administrate** – allows access to a Development menu item that contains settings for debugging old .asp pages. This is typically used by Confirmit developers or Confirmit On-Premise administrators, for example to extract more detailed feedback on any errors that might arise. This permission can only be set by the System Administrator.
- **system_enduser_administrate** – allows access to all end user lists.
- **system_global_template_administrate** – read/write/delete access to Global templates. Can set templates to be Global.
- **system_languages_administrate** – allows access to system Languages and Messages (default error messages).
- **system_project_administrate** – read/write access to all projects/panels/Reportal data sources/reports/templates.
- **system_project_data_export_admin** - allows a user in the Confirmit company (company id 1) who already has the system_project_administrate permission, to export data from a project owned by another company.
- **system_quotatarget_editor_access** - can be given to users who do not have full professional access to Authoring. This permission allows for example a supervisor to view and modify quota targets and achieved figures, but not create new quotas for the survey. The **Project Management > Quota Targets** menu item becomes active.
- **system_security_administrate** – allows access to grant task_administrate and template_administrate permissions.
- **system_task_administrate** – allows access to all tasks.
- **system_template_administrate** – Read access to all templates with company = 'all'. Read/Write/Delete access to all templates with company != 'all'. It is not possible to change company.

6.1.3.2.2. User Access to Functionality

- **system_api_access** – if you are programming towards the Confirmit APIs with XML Web Services, authentication is conducted through the userid and password of a Confirmit authoring account. You will only have access to that user's projects. Only userids with the API_ACCESS permission enabled can be used for this. When this access is enabled, a check box appears on the properties page for the Email object. Check this box to log in a table information on each email sent in batch emailing. That table has no visible user interface, but can be accessed through the use of API.
- **system_analysis_services_access** - grants the user access to Analysis Services functionality; Community Panel - Cube Management (available once the Community Panel and Community Snapshot Panel add-ons have been granted to a company).
- **system_basic_panel_access** – allows access to the Basic Panel functionality (when the Basic Panel add-on has been granted to a company).
- **system_CAPI_supervisor** – gives access to the CAPI Supervisor functionality in Confirmit (when the CAPI add-on has been granted to a company).
- **system_CATI_supervisor** – gives access to the CATI Supervisor functionality in Confirmit (when the CATI add-on has been granted to a company)
- **system_classic_reporting_access** – allows access to Online Reporting in Confirmit (when the Legacy Reporting add-on has been granted to a company).
- **system_company_administrate** – allows access to all tasks, projects and reports within a company.
- **system_communitypanel_access** – allows access to the Community Panel functionality (when the Community Panel add-on has been granted to a company).
- **system_confirmit_access** – allows access to Confirmit.
- **system_data_cleaning_access** – allows access to Survey Data Editor.
- **system_data_delete** – allows access to Clear Data functionality.
- **system_data_export** – allows access to Data exports.
- **system_data_import** – allows access to Data imports.
- **system_data_processing_access** - allows access to the Data Processing functionality (when the Data Processing add-on has been granted to a company).
- **system_db_designer_access** – allows to create/edit/delete schemas in database designer (when the Database Design add-on has been granted to a company).
- **system_debug_station_access** – allows access to the Debug Station functionality.
- **system_designer_professional_access** – allows access to Professional designer.
- **system_emailing_professional_access** – allows access to email transmission from Respondents > Emailing.
- **system_enduser_access** – allows access to create/edit/delete end users lists.
- **system_express_access** – allows access to the Confirmit Express functionality.
- **system_express_approver** – defines the user as a Confirmit Express Approver.
- **system_file_library_access** – gives access to the File Library functionality (when the File Library add-on has been granted to a company).
- **system_individual_reporting_access** – allows access to Individual Reporting in Confirmit (when the Legacy Reporting add-on has been granted to a company).
- **system_online_coding_access** – allows access to Online Coding (when the Online Coding add-on has been granted to a company).
- **system_project_create** – allows the user to create new project.
- **system_project_import_export** – allows the user to import and export project definitions.
- **system_project_production_launch** – allows access to Production mode and launch survey.
- **system_project_test_launch** – allows access to Test mode.
- **system_quality_control_access** – allows access to Quality control functionality.

- **system_rapid_results_access** – allows access to Rapid Results.
- **system_reportal_access** – allows access to Reportal (when the Reportal add-on has been granted to a company).
- **system_reporting_services_access** - grants the user access to Reporting Services functionality; Community Panel - Reporting (available once the Community Panel and Community Snapshot Panel add-ons have been granted to a company).
- **system_respondent_access** – allows access to respondent uploading and editing.
- **system_rulebased_sendout_access** – allows access to Rule-based transmissions.
- **system_sample_access** – limits access to start sampling on a panel. The user can enter jobs, but the available options are significantly reduced (available once the Community Panel add-on has been granted to a company).
- **system_sample_approve** – gives access to approve samples if you have an arrangement whereby jobs created by employees must be approved by a manager or colleague before execution (available once the Community Panel add-on has been granted to a company).
- **system_task_access** – allows access to the Task system.
- **system_template_access** – allows access to create/edit/delete WI templates.
- **system_translation_XML_access** – allows access to the Translation XML Import and Export functions (available once the Translator add-on has been granted to a company).
- **system_translator_access** – allows access to translator administrate part in projects (available once the Translator add-on has been granted to a company).
- **system_translator_user_access –** allows translator-users access to Translator (available once the Translator add-on has been granted to a company).
- **system_triple_s_editor_access** - allows the user access to the Triple-S Template editor (available when the Data Processing add-on has been granted to a company).
- **system_variable_recoding_access** – allows access to create and calculate recoded variables.

6.1.4. How to Delete a User

1. Go to the **Admin > Accounts > Users** menu command to open the list of registered users.
2. Click the **User ID** link for the required user.

   The Details page opens for the user.
3. Click **Delete**.
4. Click **Save**.
5. Click **Close** to close the User Details page.

Note: When a user is deleted, the account administrator who deleted the user will inherit all projects, templates, reports, Reportal reports, data sources, templates, etc. that belonged to the deleted user. This will ensure that no ownerless projects, templates, reports or data sources exist on the server.

6.1.5. How to Modify Users

To modify a user's or several users' roles, permissions etc:

1. Go to the **Admin > Accounts > Users** menu command to open the list of registered users.
2. At the left end of each row in the list is a check-box. Click in the box for each user for whom you wish to modify the settings, then click **Modify Users** in the upper-left corner (see the figure below).

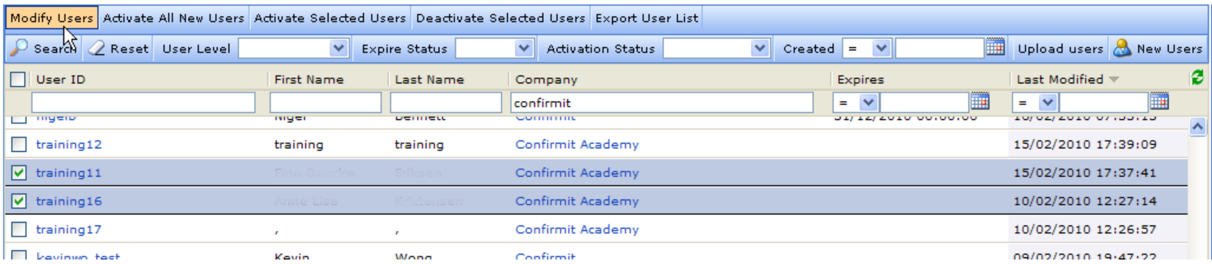


Figure 40 Selecting several users for modification

The User Modification page opens for the user(s) (see the figure below). In this page you can change the users' Roles, Permissions, Groups, and Expiry date.

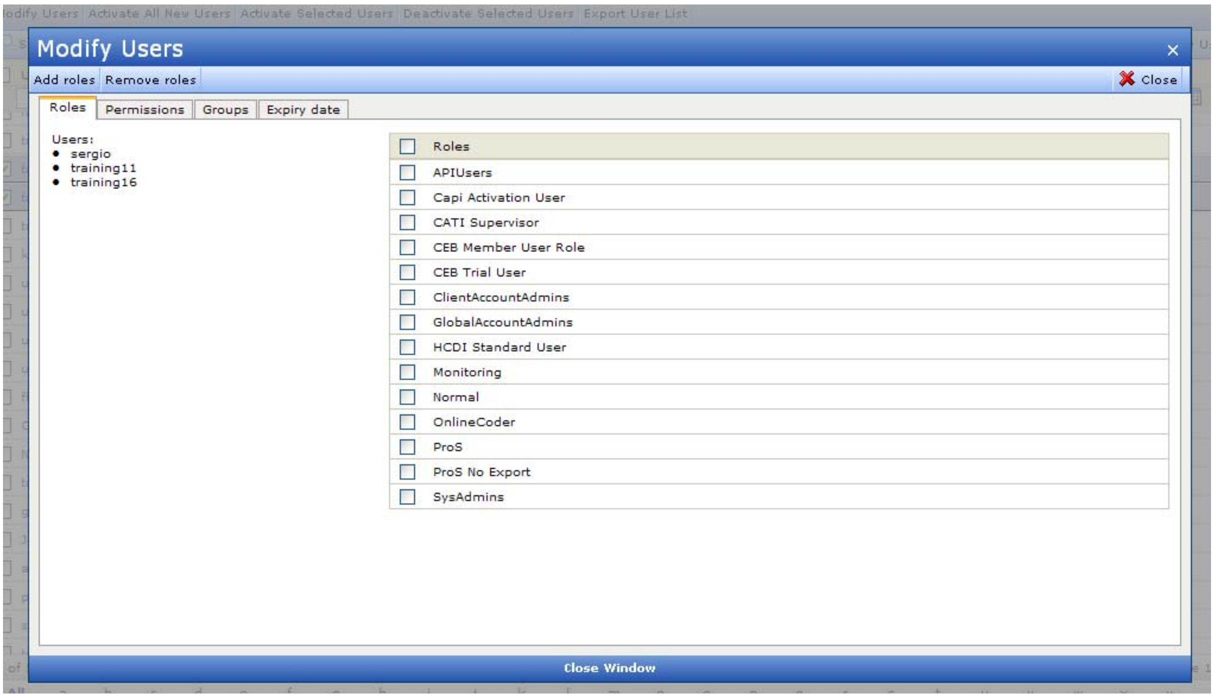


Figure 41 The User Modification page

- **Roles** – to add a Role to the user(s), choose the role and click **Add roles**. If you want to remove a Role from the user(s), choose the role and click **Remove roles**.
- **Permissions** – to give the user(s) new permissions, choose the permission(s) and click **Add permissions**. If you want to remove permissions from the user(s), choose the permission(s) and click **Remove permissions**.
- **Groups** – to add the user(s) to a group, choose the group(s) and click **Add to groups**. If you want to remove the user(s) from a group, choose the group(s) and click **Remove from groups**.
- **Expiry date** – to change the expiry date of the licenses, choose a new date and click **Update users**.

3. Make the necessary changes.
4. Click **Close** to close the User Modification page.

Note: The changes are saved automatically when you close the page.

6.1.6. Passwords and License Expiry

For a user to be valid, a password and a valid expiry date must be entered in the appropriate fields. The license expires at 11.59 pm on the date entered. If no expiry date is set, the user's license will never expire. For further information on Confirmit's password policy, go to (see section 13.7. Password Policy for more information).

6.1.6.1. How to Reset a User's Password

The users' passwords are not displayed in the Confirmit User Administration module, and are hashed (one-way encrypted) in the database, so administrators have no direct access to the passwords. Administrators can however reset a user's password, requiring the user to type in a new one. To do this:

1. Go to the **Admin > Accounts > Users** menu command.

   The User list page opens.

2. Click on a user name to open the Details page for that user.

   Towards the right side of the Details page is the Reset password link.

3. Click on the **Reset password** link.

   The Reset Password dialog opens (see the figure below).

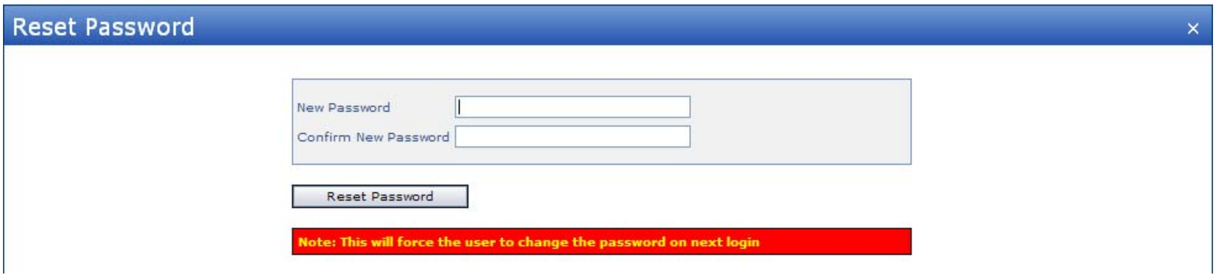


Figure 42 The administrator's Reset Password dialog

4. Type a new password for the user into the field, and repeat it to confirm.

Note: By default, Confirmit requires passwords to be a minimum of six characters. See also the Password Policy section. You can customize the password settings on the site and company levels; see the Server manual, and (see section 6.4. Admin > Accounts > Companies for more information).

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

   The user's password is now changed temporarily to that which you have just saved. You must now inform the user of their new temporary password. The next time the user logs in to Confirmit (using the temporary password), he/she will have to change their password to a new "private" password. Again, this new password will have to follow the requirements for number of characters etc.

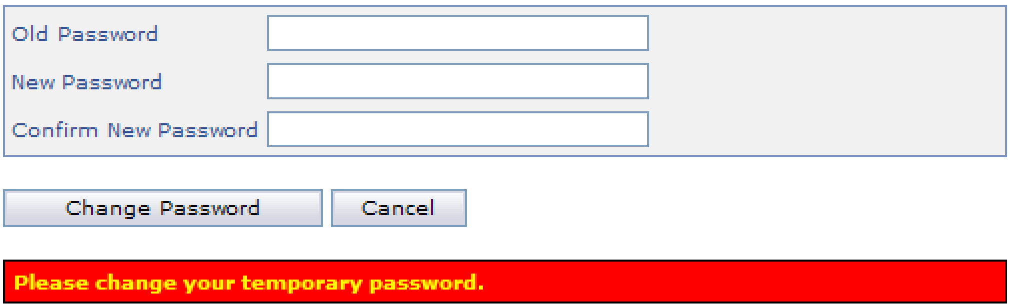


Figure 43 The user's Change Password notification

6.1.6.2. License Expiry

When an account has 30 days or less remaining until it expires, the user will be notified about this each time they log in. The expiry date is set for the company (see section 6.4. Admin > Accounts > Companies for more information).

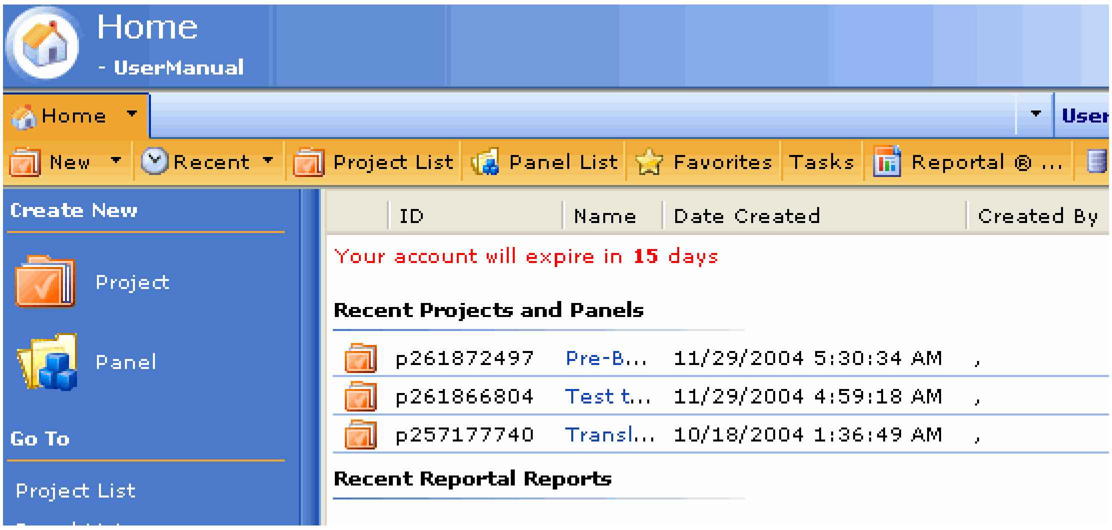


Figure 44 Account will expire in x days message

When an account has expired, the next time a user attempts to log on a warning message is shown below the login dialog. The actual warning message that is displayed can be customized for your Company (see section 6.4. Admin > Accounts > Companies for more information).

6.1.6.3. Public Encryption Key

When the company to which the user is registered has the PGP Encryption (encrypted data delivery) add-on functionality, the Public encryption key field link becomes available on the user's Details page (see section 6.1.3.1. User Details for more information). This link opens a window in which you can enter the PGP encryption key for the user (see section 6.4. Admin > Accounts > Companies for more information). See also the Confirmit Server Manual for more information regarding the set up of PGP encryption.

Note: PGP encryption is a payable add-on.

1. Go to the user's Details page (see section 6.1.3. How to Edit a User’s Details for more information).
2. Click the **Set Key** link (see section 6.1.3.1. User Details for more information).

   The Public Encryption Key dialog opens.

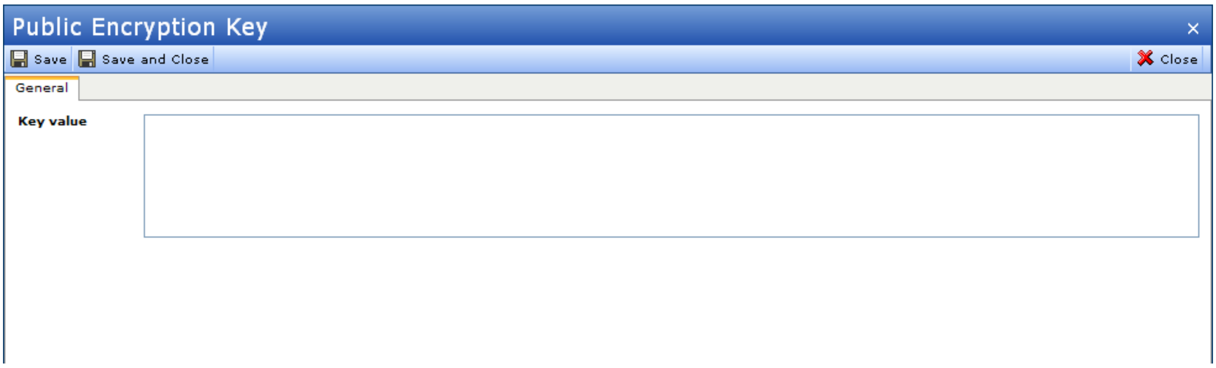


Figure 45 The Encryption Key dialog

3. Paste the user’s public PGP key into the text field.
4. Click **Save** to save the changes.

6.1.7. How to Reactivate an Account after Invalid Login

To increase system security, if a user attempts to log in to Confirmit using the wrong password too many times in succession then the account will be locked. The default number of attempts to login is set to three. This is set using a registry setting and can be changed by the server administrator if desired.

When a user account has been closed due to too many invalid logins, the Confirmit Software Administrator can reactivate the account in the User administration window.

1. Go to the **Admin > Accounts > User** menu command.
2. On the user list, click the **User ID** for the user who is locked out.

   The User's Details page opens.
3. Check the **Activate** checkbox located in the upper-right quadrant of the page.

Note: This check box only appears when the user's account has been locked due to too many invalid logins. See the figure below.

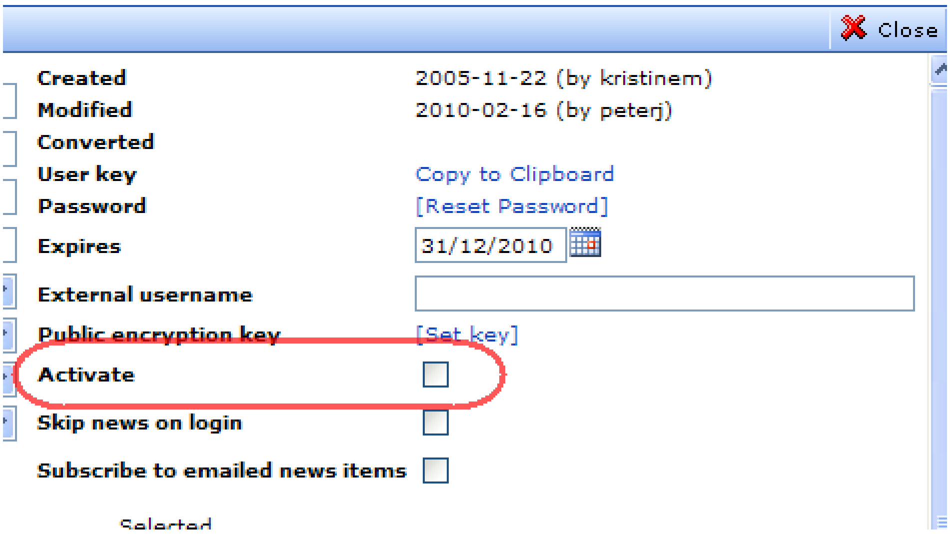


Figure 46 Resetting the user password

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

If the only administrator on a system has locked his/her account, the invalid logon count must be reset directly on the SQL server to allow the administrator to log in to the system for the account.

Note: It is not possible to change Confirmit users' passwords outside the Confirmit GUI.

6.2. Admin > Accounts > Roles

Roles are sets of permissions. The Role management function allows you to define any number of roles to which you can then assign the Confirmit users. This makes it possible to differentiate between users with respect to the functionality to which they should have access.

For example, on Confirmit's On-Demand servers, a number of roles have been pre-defined, for example:

- **Translator User** – has access to the Translator module only.
- **SysAdmins** - a system administrator.
- **ProS** – a more advanced user with administration permissions, for Professional Services and R&D Departments.
- **Normal** – a normal Confirmit license with most of the functionality.
- **Express User** – has access to Confirmit Express only.
- **CATI Supervisor** – can supervise CATI projects.

- **CAPI Activation User** – can generate the CAPI/Kiosk activation files.

Click on a blue **Name** link to open the Details page for that role. Here you can add and remove permissions as required such that users with the selected role will be able to perform the appropriate tasks.

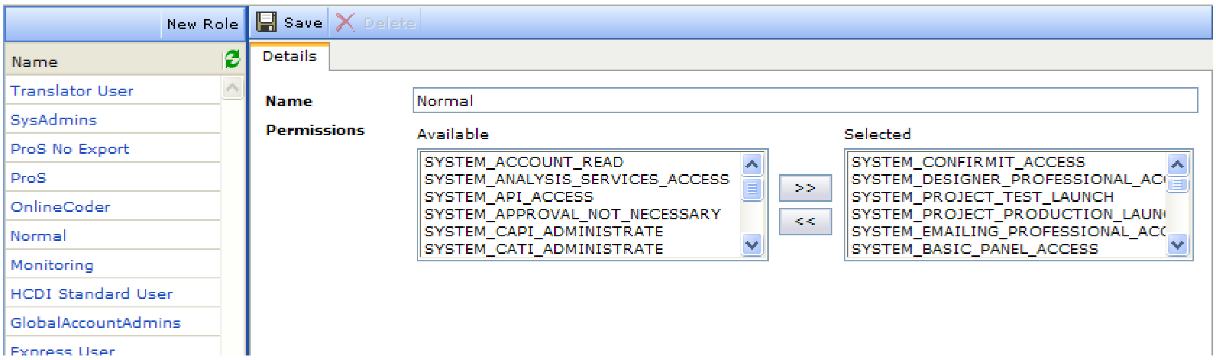


Figure 47 Roles

Server customers can define their own roles on their server.

6.3. Admin > Accounts > Groups

You can group Confirmit users into different groups, and then give permissions on a group level. For example, you can gather into one group the users who often work together on the same projects and then give that group read, write, delete and administrate permissions to projects instead of granting the permissions on an individual user basis. Group management allows you to add, delete or edit user groups.

6.3.1. How to Create a New Group

1. Go to the **Admin > Accounts > Groups** menu command.

   The group list opens.

2. Click the **New Group**button at the top of the group list.

   The Name dialog opens.

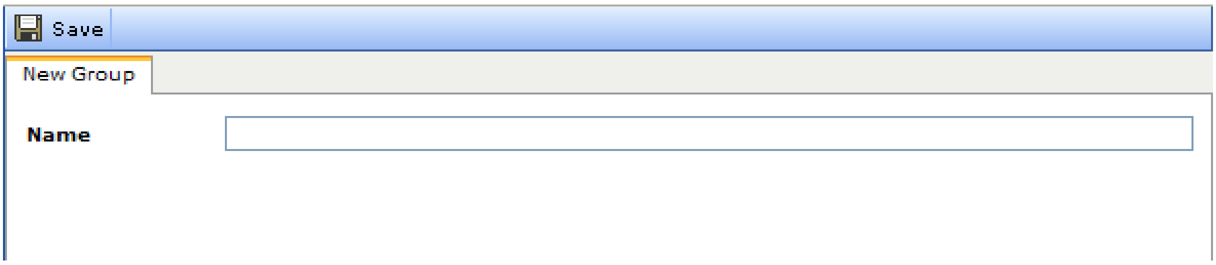


Figure 48 The New Group Details dialog

3. Type the name of the new group into the Name field.
4. Click **Save** to save the changes.

   The group is added to the list. Click on the group's Name link to open the Details page. Here you can other groups, roles, permissions and members to the group.

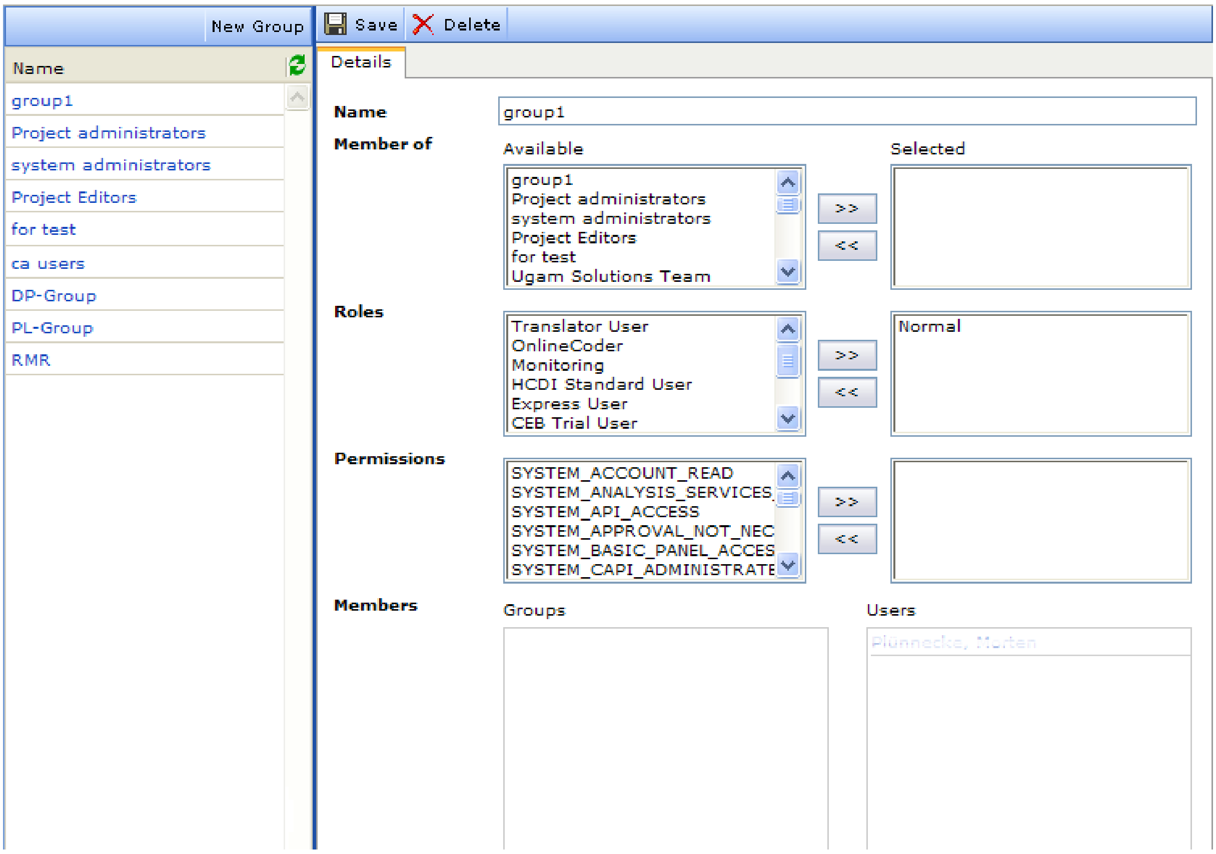


Figure 49 Example of the Group Details window

6.3.2. How to Include a Group in Another Group

You can enter a group as a member of other groups.

1. Go to the **Admin > Accounts > Groups** menu command.

   The group list opens.

2. In the Group List, click on the group you wish to edit.

   The Group Details window opens (see section 6.3.3. How to Remove a Group from Another Group for more information).

3. In the **Available** column, **Member of** field, select the group to which you wish to add the group you are currently working with.
4. Click the **>>** button to move the group into the **Selected** field.
5. Click **Save** to save the changes.

To give the group permissions, repeat the procedure for the “Permissions” field.

6.3.3. How to Remove a Group from Another Group

To remove permissions or to remove the group from another group:

1. Select the permissions or groups in the “Selected” field.
2. Click the **<<** button.

Note: The >> and << buttons operate on both the “Member of” and the “Permissions” fields.

6.4. Admin > Accounts > Companies

Every Confirmit user must be connected to a company, and all the users that are connected to a company are listed on the Users tab in that company's Details window. Go to **Admin > Accounts > Companies** to open the Company List window. This window provides an overview of all the companies registered on the server. By default, the companies are listed alphabetically by the Company Name. The Company management function enables you to add new companies and edit existing ones.

Note: Only a server administrator is allowed to delete companies.

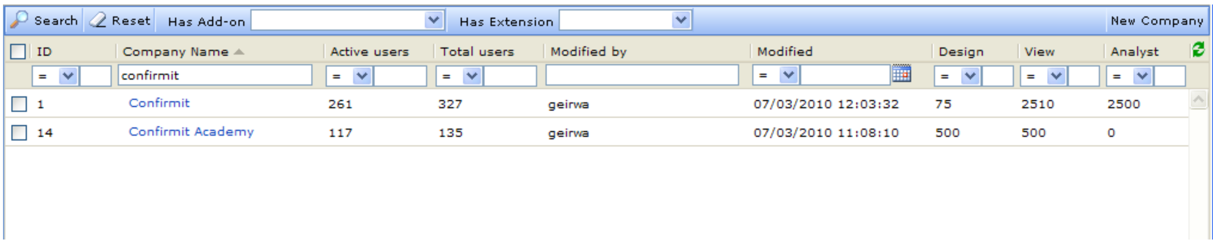


Figure 50 Example of the Company List

In the Company List you can search for and sort companies by Company Name, number of Active licenses, Total number of licenses, Modified by, when the company details were last modified, and the number of Reportal Design, Viewer and Analyst licenses.

If your search returns more items than can fit on one page, use the Page arrows in the lower right corner to switch between pages and browse through the list. The default number of items displayed is 50.

For Active, Total, Modified, Design, View and Analyst, you can select operators: Less than, less than or equal to, equal to, greater than, and greater than or equal to, and specify a number in the text field.

To sort the list by one of the columns, click on the column header. An arrow indicates in which direction the list is sorted; ascending or descending.

Click on the alphabet buttons across the lower edge of the window to return companies whose name starts with the letter that you clicked.

If you need to search for companies with specific add-ons, click the down-arrow beside the Has Add-on field to open a drop-down list. Select the add-on module that is to be used as one of the search criteria, then click **Search**.

If you want to view a company's details, click on the **Company** link. The Details window for that company opens.

A drop-down list from the Company name gives direct links to the Company details, all users in the company, and the interface for creating new users. Place the curser over the company name in the list to activate the drop-down list for that company.

Figure 51 The Company drop-down

6.4.1. How to Register a New Company

1. Go to the **Admin > Accounts > Companies** menu command.

   The Companies List window opens.

2. Click the **New Company** button in the upper right corner of the list.

The New Company registration dialog opens as shown below.

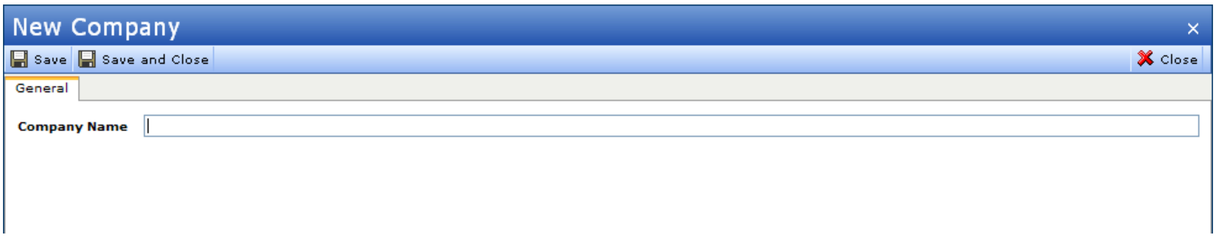


Figure 52 The New Company Details dialog

3. Enter the name of the new company.
4. Click **Save** to save the changes.

   The company is registered into the system and appears in the Company List. Go to the company in the list and click on its blue Company Name link to open the Company Details page, then set up the options and properties as required.

6.4.2. The Company Details Page

When the Company List page is open, click on a blue **Company** link to open the Company Details page for that company. The page comprises 10 tags, each holding options related to the name of the tag. The first time you open the page during a Confirmit session, the page opens at the General tag.

6.4.2.1. Company Details Page General Tab

The Company Details page opens at the General tab.

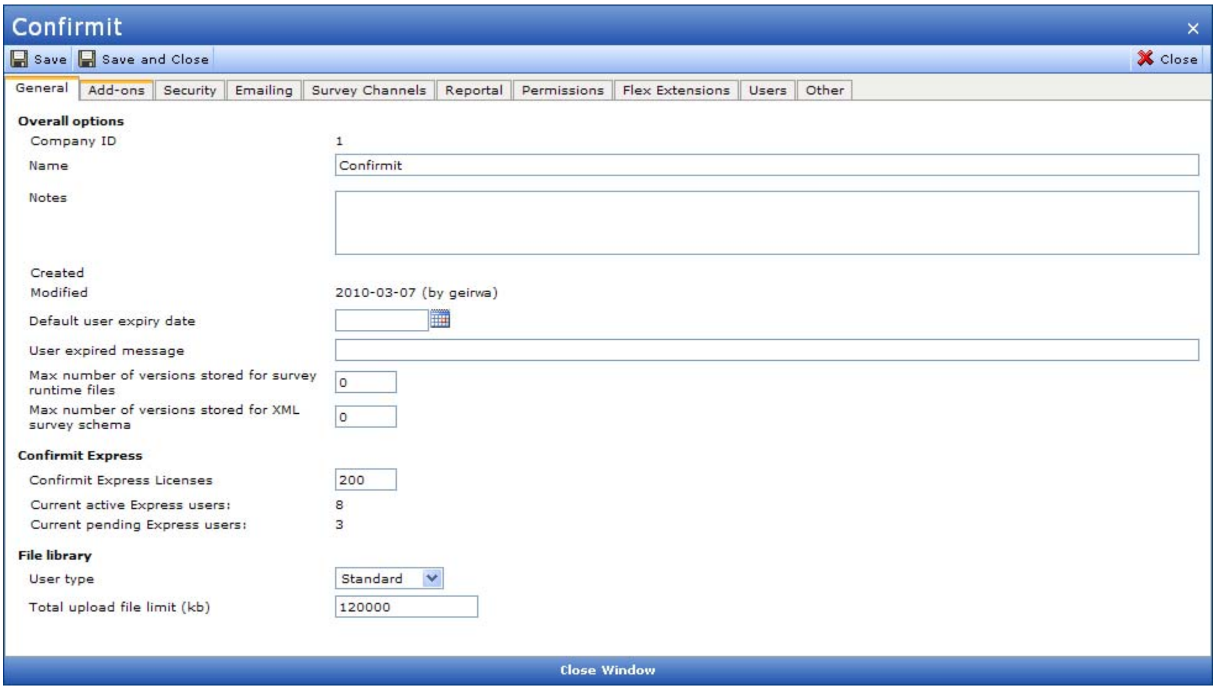


Figure 53 The Company Details page General tab

- **Company ID** - the identification number allocated automatically by Confirmit when the company is created in the system.
- **Name** - the company name as specified by the user creating the company in the system.
- **Notes** - any descriptive text, comments etc.

- **Created** - the date on which the company was created in Confirmit.
- **Modified** - the date the company details were last modified.
- **Default user expiry date** - specify an expiry date that will be applied as default to all new users within the company. The administrator can change the expiry date for specific users if necessary.
- **User expired message** - the message that will be presented to a user when that user's account has expired. Enter the warning message that you wish to use for your company.
- **Max number of versions stored for survey runtime files** - each time a survey is launched, a new version of the files is made. This property specifies how many old versions of the survey package (binary) file are stored in the database before the oldest is overwritten. If the survey is updated while respondents are in the process of responding, keeping several versions of the runtime files will enable those respondent to finish the survey in the same version as they started it.
- **Max number of versions stored for XML...** - each time a survey is launched, a new version of the files is made. This property specifies how many old versions of the survey schema XML files are stored in the database before the oldest is overwritten. These XML files are used for "Compare Survey Versions" in Authoring.
- **Confirmit Express Licenses** - enter into this field the number of licenses granted to the company for the Express option. If the field is left blank, then Confirmit will interpret this to mean “zero licenses”.
- **Current active Express users** - the number of users currently running Express.
- **Current pending Express users** - the number of Express users who have been set up and got their activation link, but who have not yet activated their accounts.
- **User type** - the type of File Library access that is to be available to users in your company. Note that the various access levels are chargeable at different rates.
- **Total upload file limit** - the current maximum size (in kb) for files to be uploaded to the File Library.

6.4.2.2. Company Details Page Add-ons Tab

This page allows you to specify which add-ons are to be available to the company.

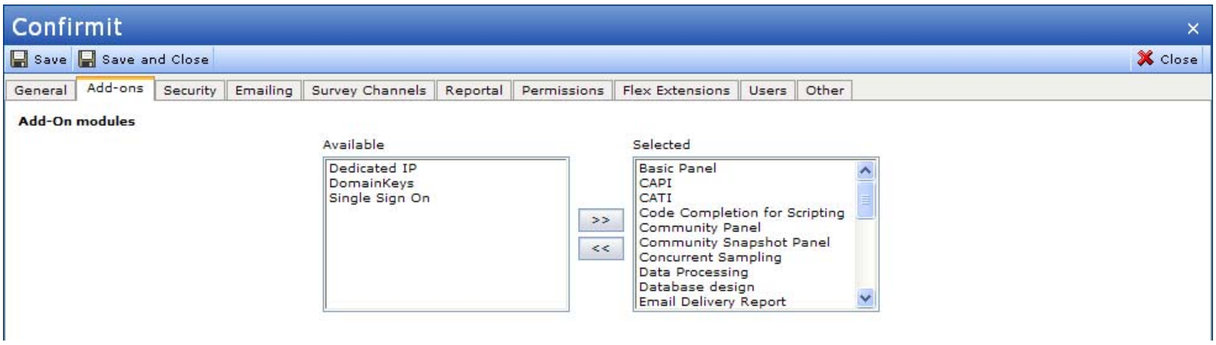


Figure 54 The Company Details page Add-ons tab

To add an add-on to the company, select it in the Available list and click the **>>** button. To remove an add-on, select it in the Selected list and click **<<** (see section 6.4.3. Add-on Modules for more information).

6.4.2.3. Company Details Page Security Tab

This tab holds the options and selections that enable you to set up the desired level of security for the company.

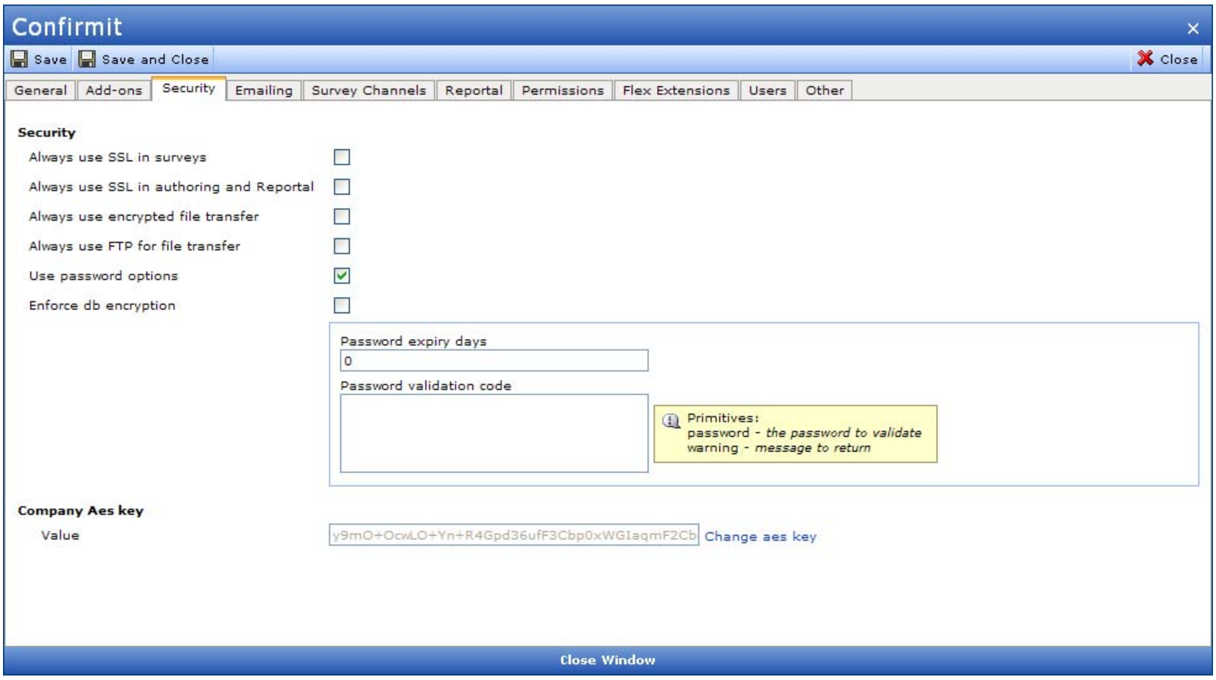


Figure 55 The Company Details page Security tab

- **Always use SSL in surveys** – check this box if you want the company to generate all links to limited surveys as secure links, for example https://survey.yourserver.com/wix/pXXXXXX.aspx. The **Respondents > Emailing > Secure** option will then be chosen by default and locked to prevent changes.
- **Always use SSL in authoring and Reportal** – forces all users in this company to use the https:// link for authoring and Reportal. The http:// link will not work.

Note: To use HTTPS/SSL you will need to obtain a server certificate from a certification authority (for example VeriSign or Thawte) and bind it to your Web server(s).

- **Always use encrypted file transfer** – check this box to encrypt all data exports, report exports and respondent exports. The setting forces all exports and imports that support encryption to be encrypted. The system cannot prevent the user uploading plain text data files to the client as the encryption is not checked until the import task is actually run, so unencrypted files can lie on the server. However any import tasks will fail if the data file is not encrypted. Note that when the box is checked, to be able to upload respondents for the users in this company, the respondent list must also be encrypted.

  Survey Definition imports and exports do not have to be encrypted. Read more about the setup of PGP encryption later in this chapter and in the Confirmit Server Manual.

- **Always use FTP for file transfer** – makes FTP the only option available in the “File transfer” field on the set up page for data exports, report exports and respondent export. The Email option is not available. Data imports and survey import and export are not affected by this setting and do not have to be to/from a FTP server.
- **Use password options** – check this box to display the Password expiry days and Password validation code fields.
- **Enforce db encryption -** if the Database Encryption add-on is licensed for your company (see section 6.4.3. Add-on Modules for more information), this check-box becomes available. Check the box to enforce encryption for all new databases for projects administered by the company. Note that this is not retro-active and will only apply to new databases. If you want the databases to be encrypted for existing company projects, the projects must be re-launched and new databases must be created. Encryption only applies to the production survey database, system databases and multimode databases are not encrypted (see section 6.4.3.1. The Database Encryption Add-on for more information).
- **Password expiry days** – specify how many days the password is to be valid after first use. The system will then prompt the users to change their password. The users will get the message:

  “Your password has expired. Please change your password.

- **Password validation code** - specify the required number of characters in the password. You must insert a Jscript code in the Validation code field, using the specified primitives, for example:

  ----

  if(password.length<8)

  {

  warning="Password must be at least 8 characters";

  }

- **Company AES key –** if Single Sign-on or External Respondent Limited Surveys are to be used, an AES key is required. This key can be entered here, although key validation is not performed on saving. When this value is defined it allows the survey setting to be selected by users; when not defined it is grayed out. The key can be entered manually, but the 'Generate AES key' link should be used as this will create a valid key.

Note: Editing this key can be dangerous (if it is changed, old links will not be valid) therefore once the key is defined, the value is read-only until 'Change aes key' is clicked. A warning message is then displayed, and the field becomes editable.

6.4.2.4. Company Details Page Emailing Tab

Here you can configure the emailing options for the company.

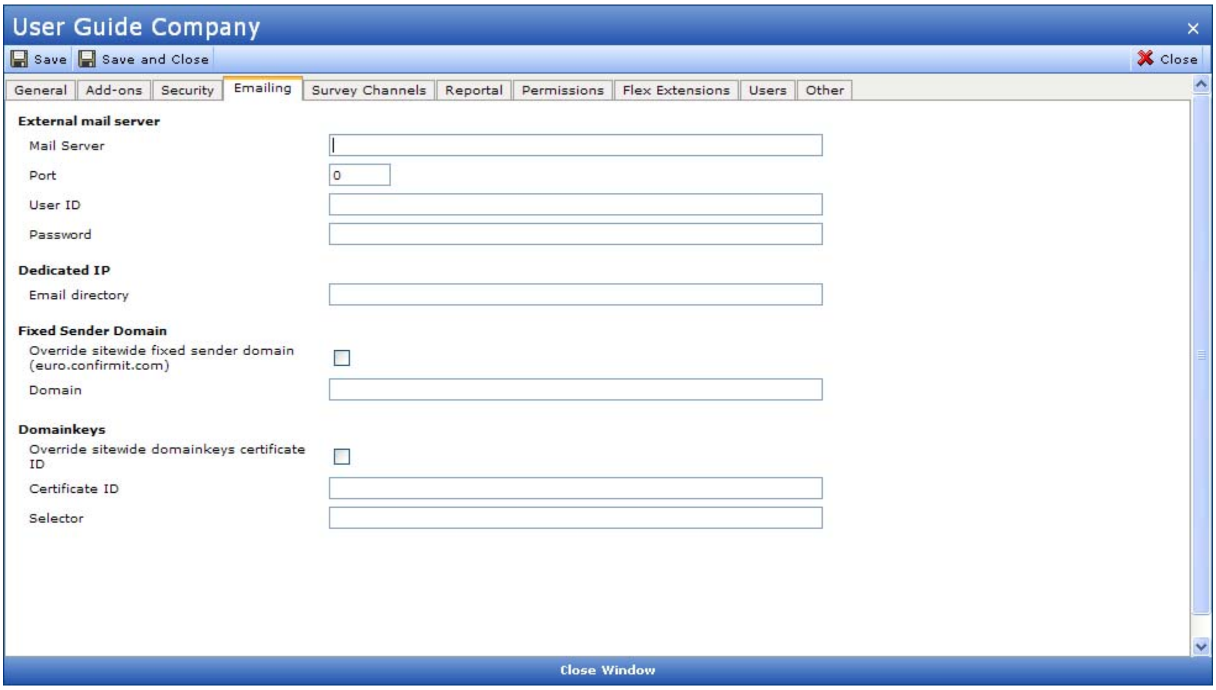


Figure 56 The Company Details page Emailing tab

- **Mail Server** - the DNS name / IP address of the remote email server. This is only required if a specific company needs to use a different mail server than others. Note that this field supports CRAM-MDS SASL only.
- **Port** - the TCP/IP port at which the remote server is configured to listen for incoming connections. Set if Mail Server (above) is set.
- **User ID** - if the remote mail server requires authentication, the username should be entered here.
- **Password** - if the remote mail server requires authentication, the password should be entered here.

- **Email Directory** - This functionality requires the Dedicated IP add-on. To reduce the chances of a company being affected by other companies being registered as SPAM producers (or themselves affecting other companies), a company can create its own dedicated email server. Type the address to the dedicated email directory into the field.
- **Override sitewide fixed sender domain** - This functionality requires the FixedSenderDomain add-on.

  Under normal circumstances Confirmit authors are forced to use a specific domain (bounceback domain) in the From field when they send emails via Respondents > Emailing. This domain would be a site-wide setting on the current Confirmit server, for example "@us.confirmit.com" on Confirmit's US ASP server. It can however be overridden for each company with a domain that the client/company would like to be set up towards the IP addresses of your Confirmit mail servers. The MX-record of the bounceback domain (a pointer that shows to which IP address the emails from this domain should be delivered) will point to the server that sends the email, i.e. the Confirmit mail server. Non Delivery Reports will always be sent to the From addresses. In this case, as the domain points to the IP addresses of your Confirmit mail servers, the delivery reports will be picked up by your Confirmit mail servers. This then makes it possible to log an Email Delivery Report for the respondents.

  One of the advantages with this bounce back system is that when an email is sent out, an additional header is put on the SMTP message. This header includes the address of the sending server. If this header does not include the same address as specified in the "from" field, many mail relays will classify this as SPAM. If the bounce back functionality is enabled, it forces the header to be the same as the one specified in the "from" field, and the possibility of e-mails being classified as SPAM is thereby reduced (see section 13.2. Batch Emailing Tasks for more information).
- **Domain** - type in the domain you wish to use.
- **Override sitewide domain keys certificate ID** - appears when the DomainKeys add-on is selected. DomainKeys is a technology that gives e-mail providers a mechanism for verifying both the domain of each e-mail sender and the integrity of the messages sent (i.e. that they were not altered during transit). If the function is used, it will reduce the chance that your emails are interpreted as spam. Check this box to use the function. For more information, refer to the web address below:

  http://antispam.yahoo.com/domainkeys
- **Certificate ID** - specifies the certificate ID to be used for this company for overriding the system default DomainKeys certificate when digitally signing outgoing emails. The certificate ID can be found using the WSE x509 Certificate Tool.
- **Selector** - specifies the domain name selector to use for the DomainKeys public key. Used by remote mail servers to determine the validity of the email digital signature.

6.4.2.5. Company Details Page Survey Channels Tab

This tab holds the options for setting up CAPI/Kiosk and CATI user licenses.

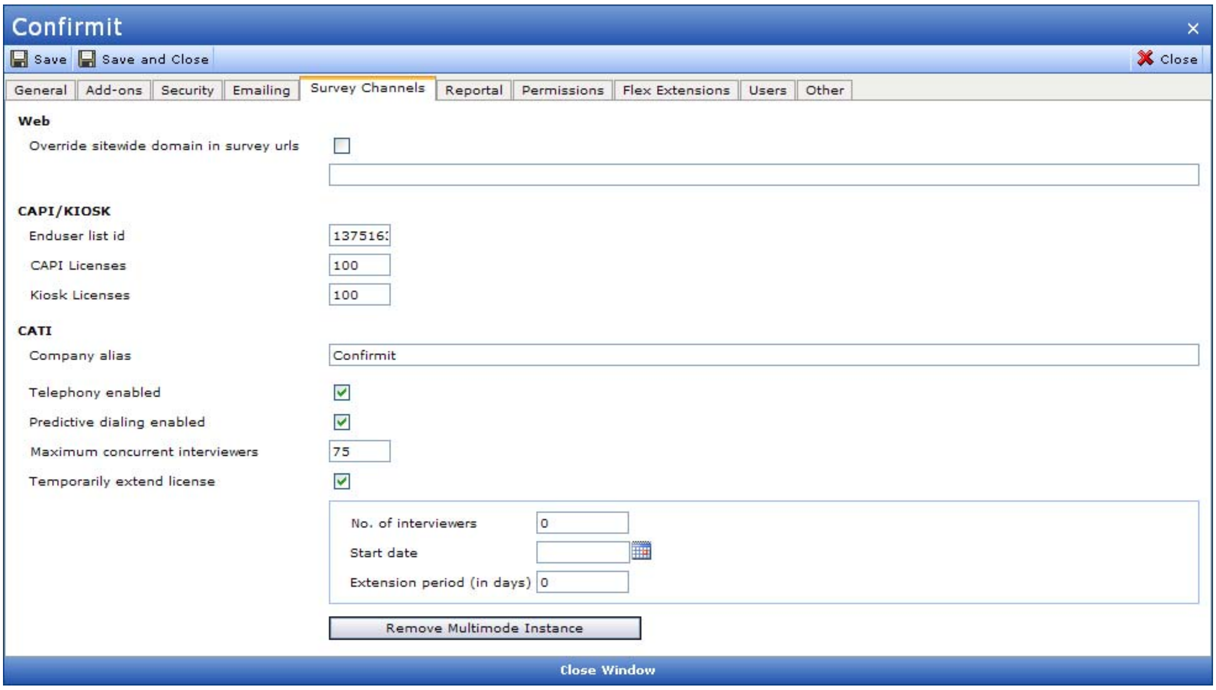


Figure 57 The Company Details page Survey Channels tab

- **Override sitewide domain in survey urls** - if you are running surveys for customers, the customers may not wish the links to their surveys to include another domain name, for example ....Confirmit.com. Your company may therefore set up a permanent domain override as a company-wide default setting. If you wish to use a domain other than the default in the survey links, select the **Override sitewide domain in survey urls** checkbox and specify the new domain in the field below.

Important:
When typing the domain link into the field, ensure you do not include a trailing space (a space character at the end of the domain). A trailing space in this link will give an error during launch for all surveys, preventing any surveys from being launched by the company.

o **CAPI/Kiosk Settings** – these fields become available if the company has the CAPI/Kiosk add-on. Use these fields as follows:**Enduser list id** – the CAPI/Kiosk Interviewers must be created in an End User List (see the Authoring User Manual and CAPI/Kiosk User Manual for more information). The ID of this End User List must be registered in the Enduser list id field. Only one CAPI/Kiosk Interviewer End User list can be registered per company.

  - **CAPI Licenses** – when a company has access to the CAPI/Kiosk functionality, specify the number of licensed CAPI consoles in the CAPI Licenses field.
  - **Kiosk Licenses** – when a company has access to the CAPI/Kiosk functionality, specify the number of licensed kiosk consoles in the Kiosk Licenses field.

- **CATI Settings** - these fields become available if the company has the CATI add-on. Use these fields as follows
  - **Company alias** - the CATI interviewer must log in using his/her username and password and also a company name as part of the identification. This will be the alias specified for this company, and the field cannot be empty.
  - **Telephony enabled** - if the company is using the on demand dialing capabilities (from MagneticNorth) this box should be checked. This will then allow for the non-manual dialing modes to be active. When enabled, it is also possible to enable predictive dialing.
  - **Predictive dialing enabled** - if Telephony enabled is checked, this sub option appears. The dialer supports two modes that are charged for at different rates per CATI interviewing seat. The options are:
    CATI (no dialer, not predictive)
    CATI with dialer (not predictive)
    CATI with dialer and predictive capabilities.

- **Maximum concurrent interviewers** - this is the maximum number of concurrent interviewers that can log into the system. Once this number is reached, additional interviewers cannot log into the system. Note that the interviewing restriction is based on the interviewer being logged in - they do not necessarily have to be inside an actual interview.
- **Temporarily extended license** - in the event your company has a large but short-term job, it is possible to increase for a limited period the maximum number of concurrent interviewers logged in. If activated, the start date, duration and excess login number must be supplied. While this period is active, the maximum number of interviewers will be the initial value + this value. Once the period expires, the maximum number allowed automatically reverts to the original value.
- **Initialize/Remove Multimode Instance** - if the CATI or CAPI add on are applied to a company, the Initialize Multimode Instance button becomes available at the bottom of the page. The multimode functionality MUST be initialized once for companies with these add-ons. This initialization process creates the necessary databases/services on the multimode system. Note that the initialization needs to be performed only once. I.e. If the project is created for a CAPI company and they then also get CATI, you do not need to create another instance.

Warning:
Once the databases and services have been created, it is possible to remove them (the button changes to Remove Multimode Instance). Removing them will display a warning, and completing the removal will delete the CATI/CAPI data from the system. This data may not then be recoverable.

6.4.2.6. Company Details Page Reportal Tab

This tab holds the administrator options for the Reportal functionality.

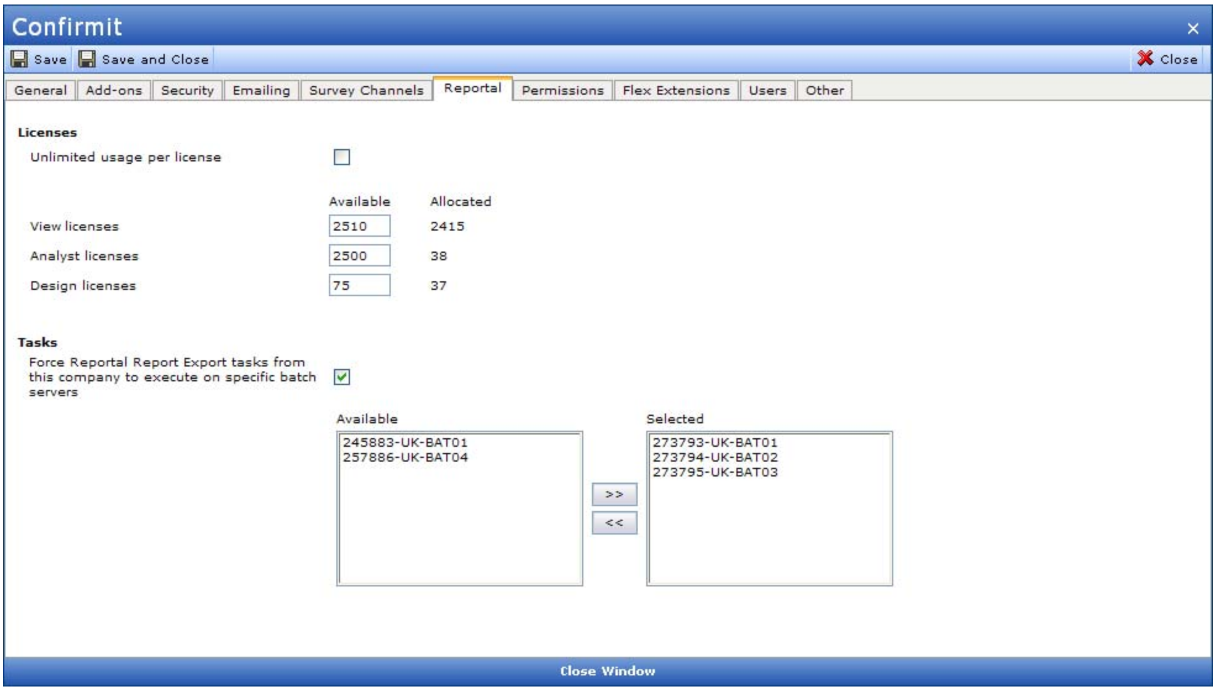


Figure 58 The Company Details page Reportal tab

- **Unlimited usage per license** - this setting concerns the different types of end user licensing model. Contact your account manager for further details.
- **View licenses** - the number of View licenses available to the company (enter the number of licenses granted to the company for the license type into the field), and the number currently allocated to specified users.
- **Analyst licenses** - the number of Analyst licenses available to the company (enter the number of licenses granted to the company for the license type into the field), and the number currently allocated to specified users.

- **Design licenses** - the number of Design licenses available to the company (enter the number of licenses granted to the company for the license type into the field), and the number currently allocated to specified users.
- **Force Reportal Report Export tasks...** - if checked, forces report export tasks to be run from the specified server(s). Select a server in the Available column and click the **>>** button to move it to the Selected column.

Note: If a company has granted a number of viewer licenses to end users, and a Software Administrator tries to decrease the number of viewer licenses in the company properties, a warning will be displayed and you will not be able to perform the change.

6.4.2.7. Company Details Page Permissions Tab

This tab lists the users currently registered to the company, and enables you to set up the user permissions for those users.

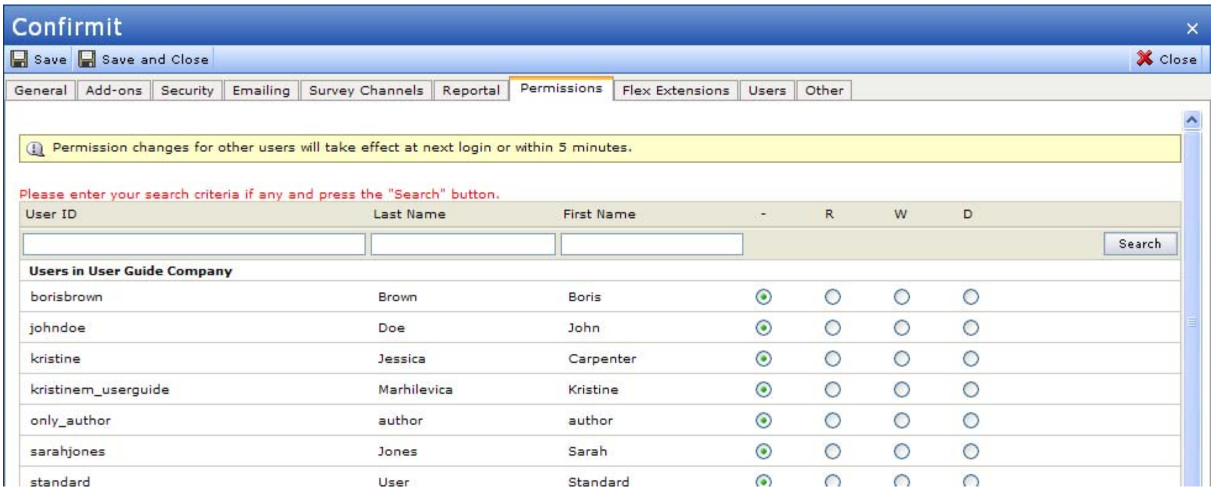


Figure 59 The Company Details page Permissions tab

The Permissions tab lists the Users in your own company, Groups and Other Users who are registered as administrators of your company. These may for example be your colleagues in your company, or system administrators of client companies for which you are creating end user lists. Use this tab to give other users access to the company in the Company drop-down list on the Project Overview page.

The Permissions tab list has a search function to enable you to more easily find the required administrator(s) in the event that the list is extensive.

The administrative options you can give are as follows:

- **- –** the default setting. The user does not have access to the company in the Company drop-down list on the Project Overview page.
- **R –**select this option to give the user access to the company in the Company drop-down list on the Project Overview page.
- **W / D –**These options are not used on this page.

6.4.2.7.1. How to Add Other Users

Initially, only users and groups within your organization are listed on the Permissions tab. However, more users may be added. To add users, you must supply Confirmit with the correct user keys of these users. Typically, an external user will send you his or her user key by email.

1. Copy this key and click the **Add other users** button at the bottom of the Permissions tab.

   The User Key Entry window opens.

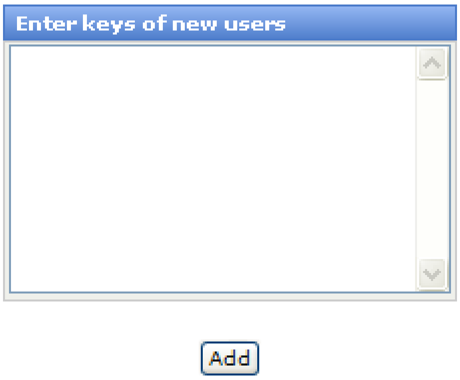


Figure 60 The user key entry window

2. Paste the key into the User Key Entry window.

Note: Make sure you do not have any space after the last character in the user key.

3. Click **Add**.

   The Entry window closes and you are returned to the Permissions tab. The newly added user will be listed in the **Other users** field. You can now give the new user the appropriate permissions.

   To remove a user from the Other Users field, click on the **Remove other users** link and then choose the users you wish to remove.

6.4.2.8. Company Details Page Users Tab

This tab lists the users that are registered for your company. The information presented on this tab is identical to that on the **Admin > Accounts > Users** page (see section 6.1. Admin > Accounts > Users for more information), and you have the same search and sort facilities. Click on a blue User ID link to open the User Details page for that user (see section 6.1.3.1. User Details for more information). Note however that you cannot create new users from this tab.

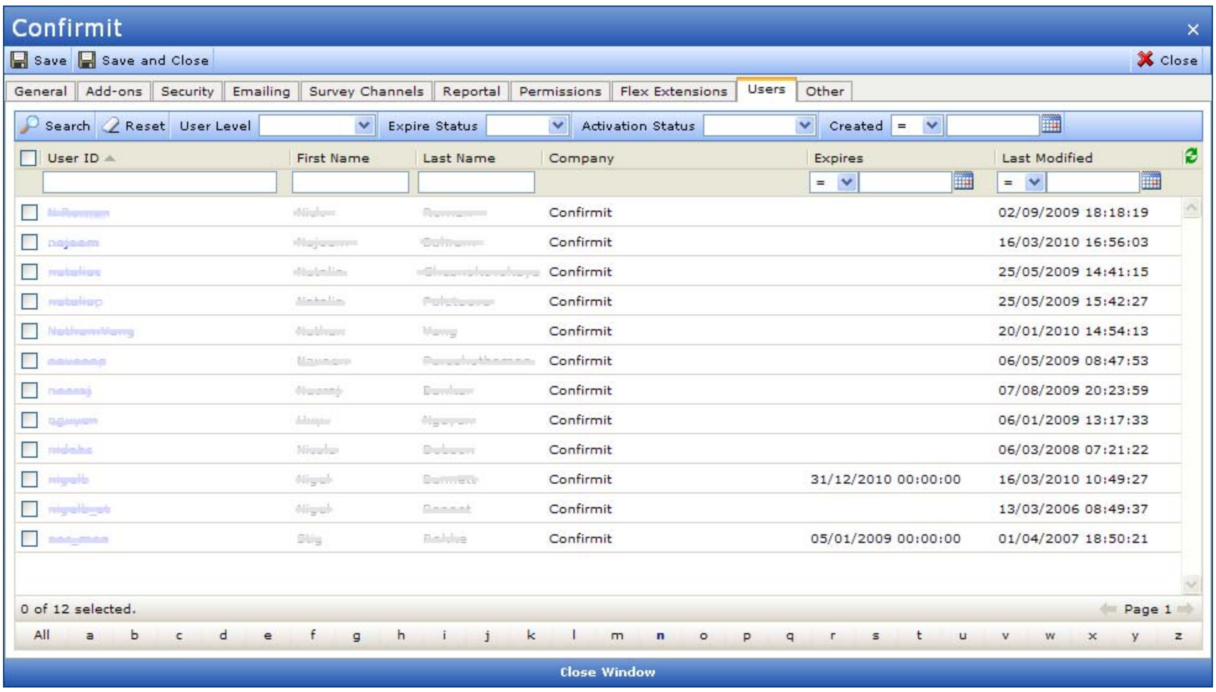


Figure 61 The Company Details page Users tab

6.4.2.9. Company Details Page Other Tab

This tab lists options that do not fall naturally under one of the other "specialist" tabs.

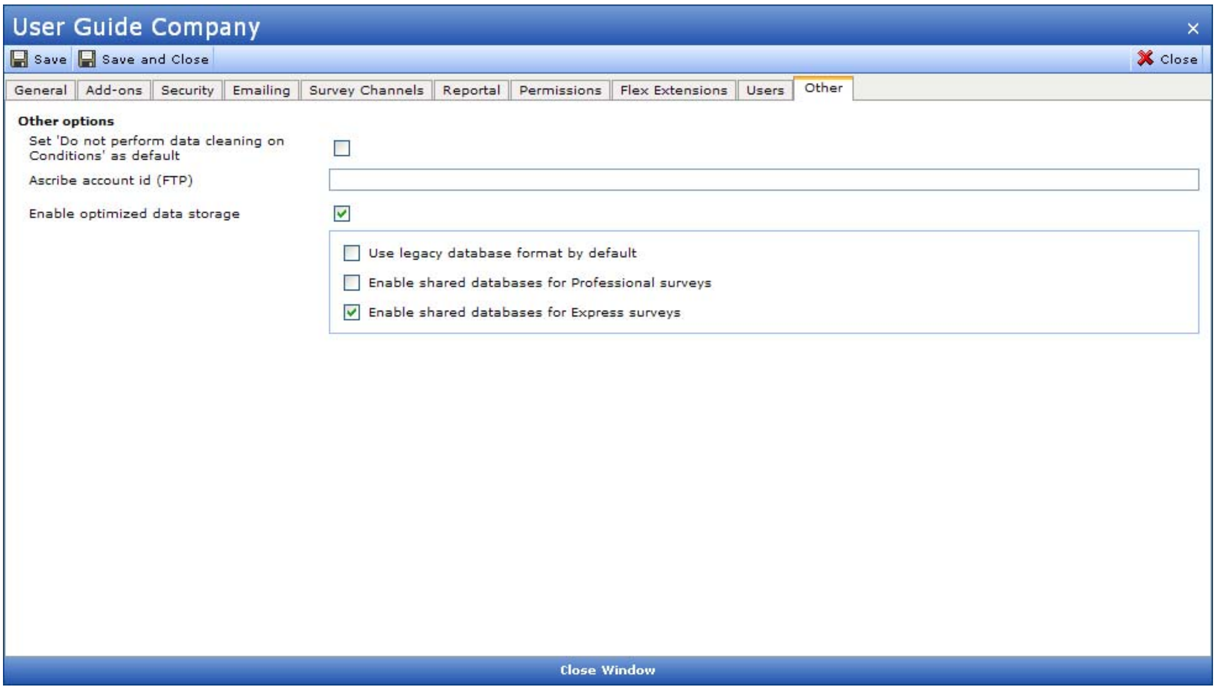


Figure 62 The Company Details page Other tab

- **Set "Do not perform data cleaning…"** – in Confirmit Designer, if a condition evaluates to FALSE, the answers to all questions inside the THEN folder are deleted. (If it evaluates to TRUE and has an ELSE folder all the answers to the questions inside the ELSE folder are deleted.) This is to ensure consistency in the data if the respondent moves back and forth in the questionnaire and changes his/her answers (if you have allowed the respondents to modify their answers). However sometimes you do not want to delete the previously entered data. This could for example be in a questionnaire where the respondent is allowed to re-enter, but should only get access to some of the questions or a different set of questions than the first time. In a Condition's Details page, the author can check the "Do not perform data cleaning" property to prevent deletion of the answers inside a THEN or ELSE folder with a check that this is the first or second time the user accesses the survey. However, as the administrator you can check this box to set the property as default for the entire company.
- **Ascribe account id (FTP)** – use this field to specify the user company's Ascribe ID for transferring Ascribe exports.

  Ascribe™ is an application for coding open text (verbatim) responses, provided by Language Logic (http://www.languagelogic.info) and is not part of the Confirmit offering or part of any product of service provided by Confirmit Company. The Ascribe export will give an XML file with questionnaire and codebook definitions, as well as response data. It gives you a simple way to transfer the data from Confirmit to Ascribe.

  Either send the XML file by email, or transfer it directly to an Ascribe FTP server.

  To use the FTP option, your company's Confirmit account must be set up with the correct FTP settings for the Ascribe FTP site. You must establish an Ascribe account by contacting Language Logics directly, and you will receive the relevant FTP account name from them.
- **Enable optimized data storage** - check this box if you wish the users in your company to have the option of using the Optimized Database format. This also activates several more options - see below. Refer to the Authoring User Guide for further information.
- **Use legacy database format by default** - check this box if you wish your company's users to use the legacy database format by default, whilst having the optimized format available if they wish to use it.

- **Enable shared databases for Professional surveys** - available if Optimized data storage is selected (see above). Check the box if you wish the users in your company to have the option of using one database to store multiple surveys. Note that Polls and projects created for data import in Reportal will be stored in shared databases per company; one database for each project type. Contact Confirmit before activating this property.
- **Enable shared databases for Express surveys** - available if Optimized data storage is selected (see above). Check the box if you wish the users in your company to have the option of storing multiple Express surveys in one database. New Express surveys will be created inn Optimized format by default if this option is selected. Contact Confirmit before activating this property.

Note: The following points should be clearly understood when using shared databases:
• Even though surveys will share a database, the surveys will have separate schemas and tables within the shared database.
• The configuration is intended more for "many small" surveys, rather than "few large" surveys. The shared setup reduces the administrative overhead for many small surveys, but separate management (for example backup, restore, etc.) of individual surveys becomes very difficult.

6.4.3. Add-on Modules

Add-on modules are additional parts of the Confirmit software. These modules must be activated by the Confirmit server administrator before they will be available for the Software Administrator to assign to individual users/companies. Confirmit includes a system for administrating access to Add-ons.

Note: Some of the Add-on modules are chargeable items, and some are only available to On-Demand customers. Contact Confirmit for details.

Note: Some of the Add-on modules are visible to Confirmit users even if they are not activated. However if a user tries to enter one of those modules, a message will appear saying that the user does not have access. Some Add-on modules are not displayed if the users do not have access to them.

The Add-on modules that are currently available are:

- **Basic Panel** – functionality to run and maintain panels and panelists in Confirmit.
- **CAPI** – gives access to the CAPI (Computer Assisted Personal Interview) functionality. See the CAPI/Kiosk User Guide for a detailed description of the functionality.
- **CATI** - gives access to the CATI (Computer Assisted Telephone Interview) functionality. See the CATI User Guide for a detailed description of the functionality.
- **Code Completion** - enables the code-completion functionality for scripting in Authoring and Reportal. Refer to the Authoring and Reportal User Guides for further details.
- **Community Panel** – gives access to the Community Panel functionality. See the Community Panel User Manual for a detailed description of the functionality.
- **Community Snapshot Panel** - for Community Panels, enables the user to take regular snapshots of the panel data. The add-on allows a new Community Snapshot panel, and a rule that transfers the data from the panel to the snapshot panel, to be created,
- **Concurrent Sampling** - for Community Panels, enables the user to multiple sampling jobs and execute them simultaneously. Scarce resources will then be allocated fairly across all the selected jobs. Refer to the Community Panels User Guide for further details.
- **Database design** – allows the setting-up of tables and table structures that can be used as answer lists in single questions in Confirmit surveys. Advantages are the possibility to maintain answer lists outside Confirmit (for use in several projects) and the possibility to define parent-child structures with any number of sub levels.
- **Database Encryption -** delivers support for project-level encryption for the production survey database (data-at-rest encryption) (see section 6.4.3.1. The Database Encryption Add-on for more information).
- **Data Processing** - allows the user access to the Data Processing functionality. This includes the Data Processing menu (refer to the Authoring User Guide for further details).
- **Dedicated IP** – gives access to the Dedicated IP functionality (see section 6.4.2. The Company Details Page for more information).
- **Domain keys** – allows e-mail providers to verify both the domain of each e-mail sender and the integrity of the messages sent (i.e. that they were not altered during transit). If the function is used, it will reduce the chance that your emails are interpreted as spam.

- **Email delivery report** – is implemented on company-wide level, and forces all users in that company to use the predefined domain in the “From” field when sending out e-mails from Confirmit. For example, on the Confirmit ASPs this domain is set to "us.confirmit.com" (US ASP) or "euro.confirmit.com" (UK ASP). In addition to improving deliverability, this also allows access to the Email Delivery Report giving full visibility into the status of the e-mail send-outs from Confirmit.
- **File Library –** gives access to functionality where Confirmit users are allocated their own domain to store files. See the Authoring User Manual for a detailed description of the functionality.
- **Fixed sender domain –** gives access to the corresponding functionality (see section 6.4.2. The Company Details Page for more information).
- **FTP for file transfer** – data transfer through File Transfer Protocol.
- **Kiosk** – gives access to the Kiosk functionality. See the CAPI/Kiosk User Manual for a detailed description of the functionality.
- **Legacy Reporting** - to reduce support, training, documentation, QA, and maintenance, the "legacy" Reporting functionality is now supplied as an add-on. For new customers, the functionality is included in other areas of the application.
- **Multi precode data export** – allows the export of precode data for multi questions.
- **NonPredictive Telephony** - CATI add-on. See the CATI User Guide for a detailed description of the functionality.
- **Online coding** – functionality for coding answers to open text questions and “Other, specify” answers into the answer list of a multi question. This gives more possibilities within reporting of these data.
- **PDF Respondent Report –** functionality to allow the generation and emailing of a PDF file with HTML. This can, for example, be used to send an email of the respondent’s answers to a manager.
- **PGP Encryption** – encrypted data delivery. To make use of this the server must be set up with PGP Encryption. See the Confirmit Server Manual for information regarding PGP Encryption set up. Note that an encryption key must be entered for all users that should be able to use and receive encrypted data (see section 6. Admin > Accounts for more information).
- **Predictive Telephoney** - CATI add-on. See the CATI User Guide for a detailed description of the functionality.
- **Questionnaire Reviewer** – gives access to the Questionnaire Reviewer functionality. This enables Confirmit authors to allow third-parties access to a limited part of Confirmit so the third-parties can review and make minor changes to Confirmit questionnaires. See the Confirmit Authoring User Guide for further information.
- **Random Data Generator** – allows users to create more than 50 responses in the Random Data Generator functionality. See the Authoring User Manual for a detailed description of the functionality.
- **Reportal** – provides access to the Reportal functionality. See also the two add-ons below.
- **Reportal Public Access** – allows Reportal reports to be defined as public, and an open link can be sent to Viewers/End users.
- **Reportal Report Export** – allows the export of entire Excel and PPT reports from Reportal. The users will also be able to give report Viewers and Designers rights to export a certain number of reports.
- **Sample Only** - allows the user to upload links to an external survey. On each job, a new option is available; "External survey links" which allows you to upload a repository of unique links to an external survey. The links will be added to the Sample file and can be uploaded to a Confirmit project that handles the statusing and redirecting for the Sample Only job.
- **Single Sign On** – provides access to the Single-sign-on functionality which allows user’s to re-use their local logon credentials when logging on to Confirmit.
- **Spell checker –** functionality for spell-checking text in questions, answer lists, information nodes etc.
- **Translator –** functionality for administrating the translation of multilingual projects with several translators working outside authoring.

6.4.3.1. The Database Encryption Add-on

The Database Encryption add-on delivers support for project-level encryption for the production survey database (data-at-rest encryption).

The add-on applies encryption to the project's production database only; the test database, system databases and the multimode databases are not encrypted. The company shared database used for Express projects, and the company shared database used for shared projects, will assume the setting is in use when the databases are created for the first time.

The encryption is delivered through SQL Server TDE (Transparent Data Encryption) using a secure certificate deployed on the encryption-enabled SQL Server database instance(s). Encryption can only be applied at the database creation stage, and it cannot be changed when a survey is re-launched unless a new DB is being created.

When the add-on is activated for your company, the **Security** tab in the **Admin > Accounts > Companies** page includes the **Enforce db encryption** checkbox (see section 6.4.2.3. Company Details Page Security Tab for more information). Check this box to enforce encryption for all new databases for projects administered by your company. Note that this action is not retro-active and will only apply to new databases; pre-existing databases will not be encrypted. If you want the databases to be encrypted for existing company projects, the projects must be re-launched and new databases must be created.

When the add-on is activated for the company and the Enforce db encryption check-box is not checked, then an optional setting for selecting encryption for a project's database is visible to the project author on the Project Overview page and the Survey Launch page. Again, this can only be applied to new databases; if the author wants to encrypt the database for an existing project, the project must be re-launched and a new database must be created.

Encryption is essentially transparent to survey authors apart from the setting itself; data viewing, editing, importing, exporting etc. remains unchanged. It is also transparent to respondents.

Testing has shown the encryption overhead to be negligible, but it does introduce more load onto the SQL Server instance than for unencrypted project databases. Note that during back-up, un-encrypted databases are compressed to save space before the back-up is taken. However encrypted databases cannot be compressed, so the space required for backups of encrypted databases can be significantly greater than for the unencrypted version.

Database Encryption is available as a licensable add-on for On-Premise customers (not in Confirmit versions prior to v15), however SQL Server TDE is only available in Enterprise edition SQL Server.

6.4.3.2. Changes to Add-ons

The following sections describe changes that have been made to some of the add-ons.

6.4.3.2.1. Fixed Sender Domain Add-on

In versions of Confirmit prior to version 11, users could activate the Fixed Sender Domain functionality without the add-on. From Confirmit version 11, users must have the add-on (see section 6.4.2. The Company Details Page for more information) to use this functionality. Any relevant settings that a company may have made in previous versions of Confirmit will no longer be accessible/available unless the add-on is licensed. If the Fixed Sender Domain add-on is licensed for version 11, then all previous settings will be reactivated.

6.4.3.2.2. Domain Keys Add-on

In versions of Confirmit prior to version 11, users could activate the Domain Keys functionality without the add-on. From Confirmit version 11, users must have the add-on (see section 6.4.2. The Company Details Page for more information) to use this functionality. Any relevant settings that a company may have made in previous versions of Confirmit will no longer be accessible/available unless the add-on is licensed. If the Domain Keys add-on is licensed for version 11, then all previous settings will be reactivated.

6.4.3.2.3. The Results of the Changes

On-Premise clients without Premium Emailing - These clients will not be able to use the Fixed Sender Domain, Email Delivery Report, and Dedicated IP functionality after the Confirmit 11 upgrade. In addition, these users will not be able to use the Domain Keys functionality after the upgrade unless this is included in the license.

On-Premise clients with Premium Emailing - These clients must order a new license that includes the Fixed Sender Domain add-on. Confirmit will then activate the functionality.

On Demand clients - These clients will have access to the Fixed Sender Domain and Email Delivery Report functionality as part of their existing license.

6.5. Admin > Accounts > Overview

This option provides you with an aggregated overview of all licenses on the server:

Licence Overview	
Companies (Active/Total)	444/467
Users (Active/Total)	1457/2832
Professional licenses (Active/Licensed)	1321/100000
Translator licenses (Active)	80
Express licenses (Active/Licensed)	49/0
Reportal View Licenses (Active/Licensed)	17564/1000000
Reportal Analyst Licenses (Active/Licensed)	2598/0
Reportal Design Licenses (Active/Licensed)	709/1000000
CAPI Console Licenses (Active/Licensed)	327/(N/A)
Kiosk Licenses (Active/Licensed)	26/(N/A)
CATI Licenses (Active/Licensed)	516/(N/A)

Confirmit Express Users for User Guide Company	
New	0 (0 expired)
Pending	0 (0 expired)
Deactivated	0 (0 expired)
Active	0 (0 expired)
Total Confirmit Expresss licenses for company	0
Total available Confirmit Express licenses	**0**

Figure 63 The License Overview dialog

7. Archiving

Use this function for “house-keeping” on the server. Here you can define a set of rules such that after a preset number of days with no activity on a project, a warning will be sent to the owner (creator) informing them that the project will be archived on a certain date. The owner then has the chance to delete the project, define a new archiving date or place a “do not archive” flag on the project.

When a project is archived, a backup copy is first made and sent on an email to the project owner.

Go to **Home > Archiving** to see a list of your projects that are scheduled for archiving (if you are the system administrator then you will see a list of all the jobs on the server that are scheduled for archiving) (see section 7.2. Archiving List for more information).

7.1. Archiving Option Setup

1. Go to the **Admin > Archiving Options** menu command.

   The page shown below opens:

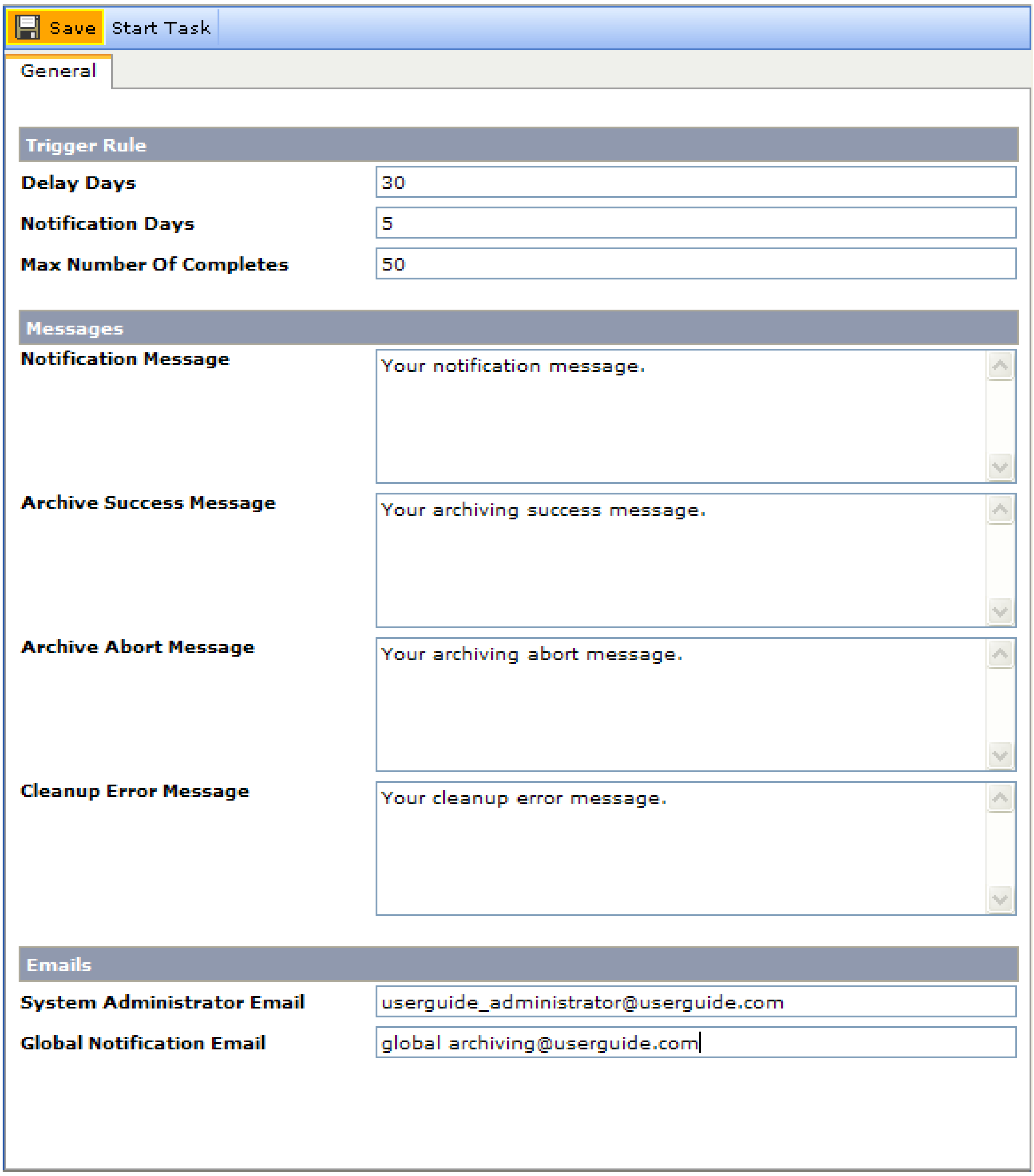


Figure 64 The Archiving options page

This page displays the parameters used by the Archiving task.

- **Delay days** – an integer that will be added to the last active date for a project when calculating the project's expiry-date. Once a project has had no activity for this number of days, the archiving routine will start.
- **Notification days** – an integer that specifies how many days prior to a project's expiry date a notification mail is to be sent.
- **Max number of completes** – if an integer is added to the field, projects with more completes than the number specified will not be considered for archiving. That is, an expiry date will not be computed for the project.
- **Notification message** – type the message that is to be added to the notification e-mail that will be sent to the project's owner.

- **Archive success message** – editing field for the Archive success message. This message is added to the email that is sent to the project owner when a project has been successfully archived.
- **Archive abort message** – editing-field for the "Archive abort" message. The message is added to the email that is sent to the project owner, and to the System Administrator e-mail address, if an error occurs while archiving a project.
- **Cleanup Error message** – editing-field for the "Cleanup Error" message. The message is added to the email that is sent to the project owner if the deletion of project-data fails after a project is archived.
- **System Administrator Email** – the email address to a System Administrator/project creator who is to receive an email if a project archiving process should fail.
- **Global Notification Email** – an email address to which notifications and alerts about all archiving processes are to be sent.

2. Click **Save** to update the data-fields in the database.

Note that the Confirmit server installation ID will be included in the emails that are sent from the archiving functionality. If archiving is running on more than one Confirmit site, the installation ID will function as an indicator on which server the archived project is to be found.

7.2. Archiving List

Go to **Home > Archiving** to display the archiving list. The list opens as shown in the example below

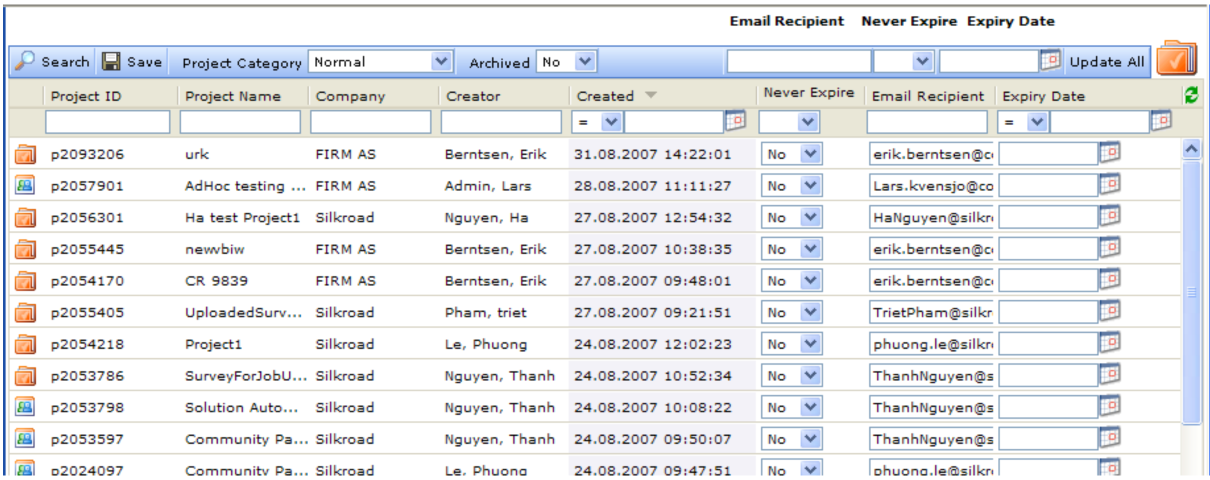


Figure 65 Example of the Archiving list

When you initially open the page, it lists the projects that are due to expire in the next 'n' days ('n' being the number of "Notification days").

To search for projects, enter search criteria into the fields in the Search row, and click the **Search** button. The page will then be refreshed with projects that match the criteria. The criteria will remain in the Search row until you delete them.

To search for projects that have been archived, change the value in the Archived selection box to **Yes** and click **Search**. The same search-criteria apply for archived projects.

A user who is defined as a System Administrator is able to view all projects, while other users may only view projects they have "Read" permission for.

Click on one of the projects in the list to display the Project Archiving Details area. Here you can fill in information for that project.

Figure 66 Project archiving details

For system administrators the area has the "Delay..." box as shown in the figure below. System administrators can:

- Update the Email Recipient field, which defaults to the email-address for the creator of the project.
- Update the Expiry date field that is either calculated by the system or shows the expiry date that is chosen by the user. If the user sets the expiry-date, it will not be overridden by the archiving task. A project that is created between two executions of the archiving task, will display no value in the Expiry date field.
- Set the **Do not expire** checkbox. This, followed by **Save**, causes the expiry date for that project to be cleared and no new expiry date will be calculated by the archiving task as long as the checkbox is set.
- Click **Save** to update the project information and refresh the page. The changes will be reflected in the survey list and the Project archiving details area will be cleared.

Project administrators (for the clicked project) can:

- Update the Email recipient field. This defaults to the email address for the creator of the project.
- Update the Expiry date by seven days (by setting the “Delay by 7 days” checkbox), if the expiry-date has already been calculated by the system (see section 7.3. Archiving Task for more information).

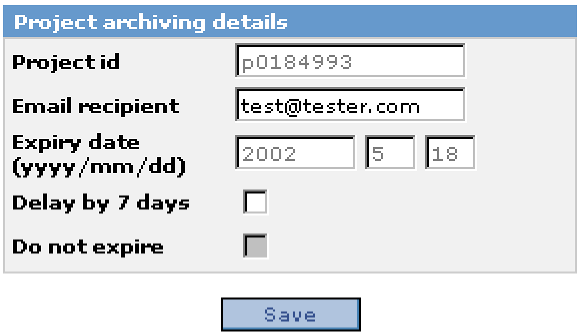


Figure 67 Project archiving details with Delay field

Project Administrators cannot change the Do not expire flag.

Project Administrators cannot extend the expiry date (i.e. the Delay expiry date checkbox will not be displayed) if they already have extended the date (the checkbox will be visible again after seven days), a system administrator has set the expiry date for the project, or if the expiry date is blank.

Users with only “Read” permission for a project will not be able to change any data. The project-information will be presented, but the **Save** button will be disabled.

7.3. Archiving Task

The archiving task is executed by Confirmit’s task system. To view instances of the task and set the recurrence pattern for the task:

1. Go to the Tasks page in Confirmit and click the **Search** tab.

2. On the Search page, choose **Archiving** as the task type.
3. Click **Search**.

   A list of instances is displayed.

4. To start a new instance, go to the task-definition for one of the existing instances and start a new instance or set a recurrence-pattern.

   The batch server must be configured to run Archiving tasks:

☑ Active	Description
☑	Activity Log Export
☑	Archiving
☑	Batch Emailing

Figure 68 Archiving task

Only the System Administrator will be able to view instances of and administrate the archiving-task. The task will run through all projects that do not have the “Do not expire” flag set and for each project, one or more of the following processes will be run:

- If the option “Max number of completes” is set and the project has more completes than the value, no expiry-date will be calculated.
- If a system administrator has not set the project’s expiry-date, a new expiry-date will be calculated.
- If the expiry-date is within the number of notification-days, a notification email is sent.
- If the project expires “today”, it will be archived and an email will be sent to the email recipient for the project.
- If a project has its expiry-date calculated for the first time and the date is “today” or less than “today”, then the project will not be archived immediately. The expiry-date will be set to the current date extended by the number of notification days, and a notification email will be sent. If a user does nothing to the expiry-date, the project will be archived on the expiry-date set.

8. Admin > News Update

Go to the **Admin > News Update** menu command to open the Confirmit News window. Use this window to enter, edit and delete the news items announced on the Main page and the announcements on the Login page.

You can search for news texts by the various columns. Click on the down-arrows beside the column headers and select from the options available, then click the **Search** button.

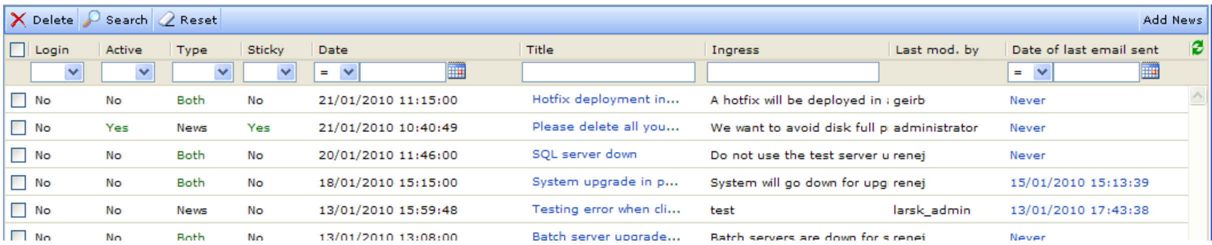


Figure 69 Example of the News Update window

To view a news item, right-click on the blue Title link to open the drop-down menu, then select View News Item. A viewing window opens.

To edit a news item, right-click on the blue Title link to open the drop-down menu, then select Edit News Item, or just click on the link. An editing window opens (see section 8.1. How to Add a News Item for more information).

The "Date of last email sent" column contains either 'Never' if the news item has never been sent via email, or the date/time it was last sent.

To send a news item via email, click on the 'Never' link (or the date/time) for the new item. This displays an overlay previewing what will be sent to the subscribed users. Note that the news item cannot be edited from this preview. Clicking **Send news via email** will cause a new task to be created that will send the email to all subscribed users. There is a confirmation dialog before the task is initiated.

It is possible to send emails to active and non-active news items. It is possible to send the same news item multiple times, and every time it will be sent to ALL subscribed users.

8.1. How to Add a News Item

1. Click the **Add News** button located towards the right end of the window toolbar.

   The Add News Item window opens as shown in the figure below.

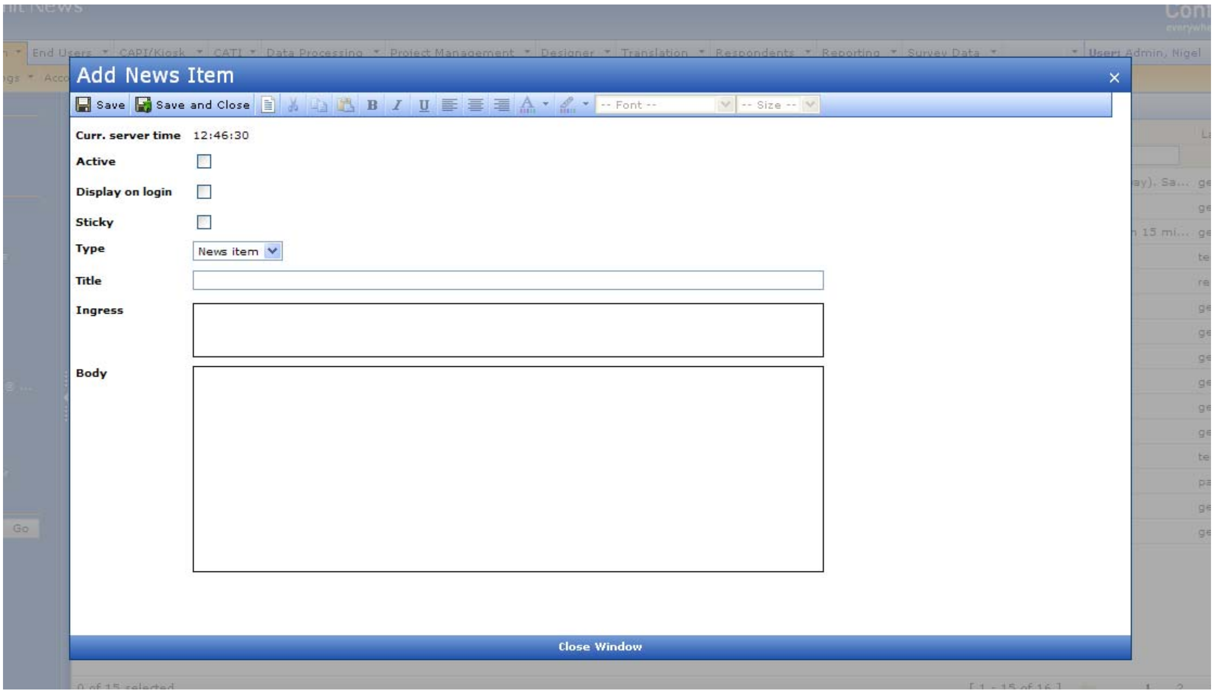


Figure 70 The Add News Item window

2. Fill in the details as required.

- **Active** – check to make the news item visible to ordinary Confirmit users.
- **Display on Login** – check to place the message on the Confirmit Login page.
- **Sticky** – check if you wish to preserved the news item on the front page even when more recent news items are added.
- **Type** - select the type of item you wish to display.
    - o **IM** - Instant Message - when this type of news is created, an overlay is displayed automatically at the given date/time (additional fields appear when IM is selected) to all users who are logged into the system. This type of message could be useful if for example you need to tell users "the system will be reset in 5 minutes".
    - o **News Item** - a "standard" news item. News items can be set as IM and regular news simultaneously, so they will be displayed as IM and will also show up on the front page in the News section afterwards.
    - o **Title** – the title of the news item.
    - o **Ingress** – a summary of the news item.
    - o **Body** – the main text for the news item.

3. Click **Save** or **Save and Close** the save the changes and publish the news message.
4. Click **Close Window** to close the window and return to the Confirmit News page.

To delete a news text, check the box to the left of the news title and click **Delete** at the top of the list.

Note: There is a limit of 5000 characters per news text item.

9. Admin > System Configuration

Refer to the Confirmit Server Manual for information about configuring the system.

10. Admin > Projects

Under the **Admin > Projects** menu there are three parameters:

- Custom fields.
- Project Info Report.
- Project Log.

10.1. Admin > Projects > Custom Fields

You can add Custom fields for better project classification. The fields can be Required or Optional. Required custom fields must be chosen specifically for each project.

- Go to **Admin > Projects > Custom Fields**.

  The Custom Fields list opens. This list may be empty, or if some custom fields have been defined previously, they will be listed here.

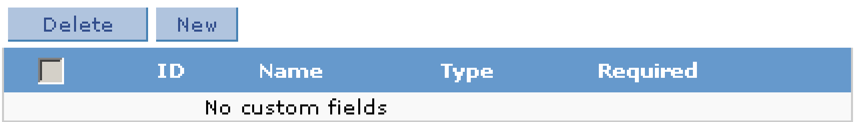


Figure 71 Custom fields list, empty

10.1.1. How to Create a New Custom Field

1. In the Custom Fields list, click **New**.

   The Manage Custom Fields page opens.

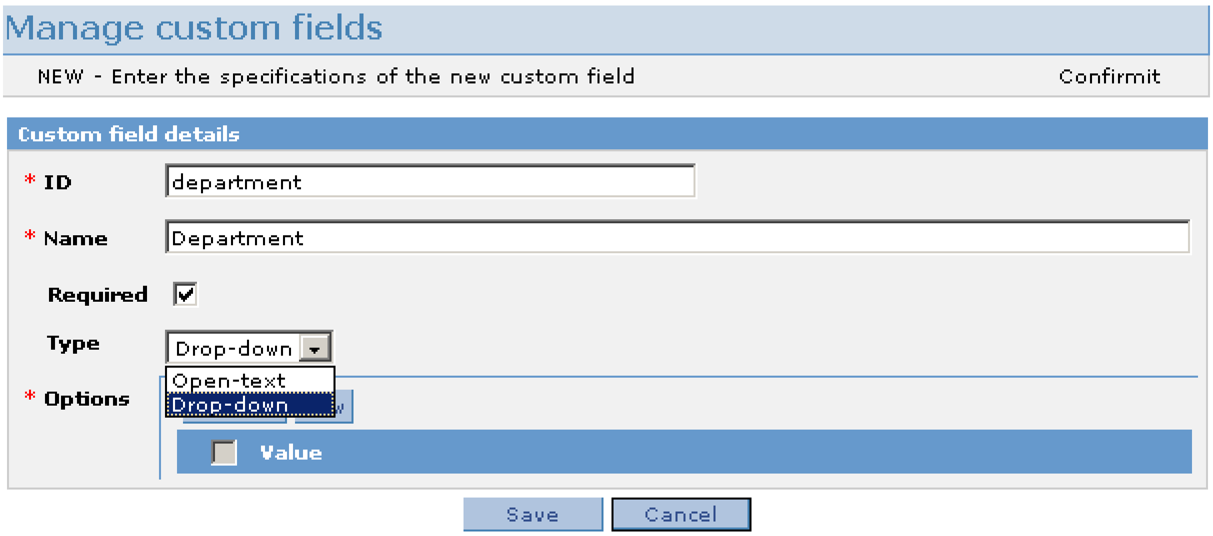


Figure 72 Custom fields management

2. Define the specifications of the new custom field.

   The fields marked with the red asterisk are required fields. The fields are as follows:

   - **ID** – enter the ID name or number of the custom field.

- **Name** – enter the name or a short description of the custom field.
- **Required** – select this box if the new custom field is to be a required field in each project.
- **Type** – select between Open-Text and Drop-down. If you specify the custom field type to be Drop-down, you must then define the options that are to be shown in the drop-down list (see the figure below for an example).
- **Options** – is displayed when Type is set to Drop-down. Use this field to define the options that are to be included in the drop-down list.
- **Length** – This field is displayed and made required if you have specified Type to be Open-Text. Specify the maximum number of characters that can be written into this field in the **Project Management > Overview** page.

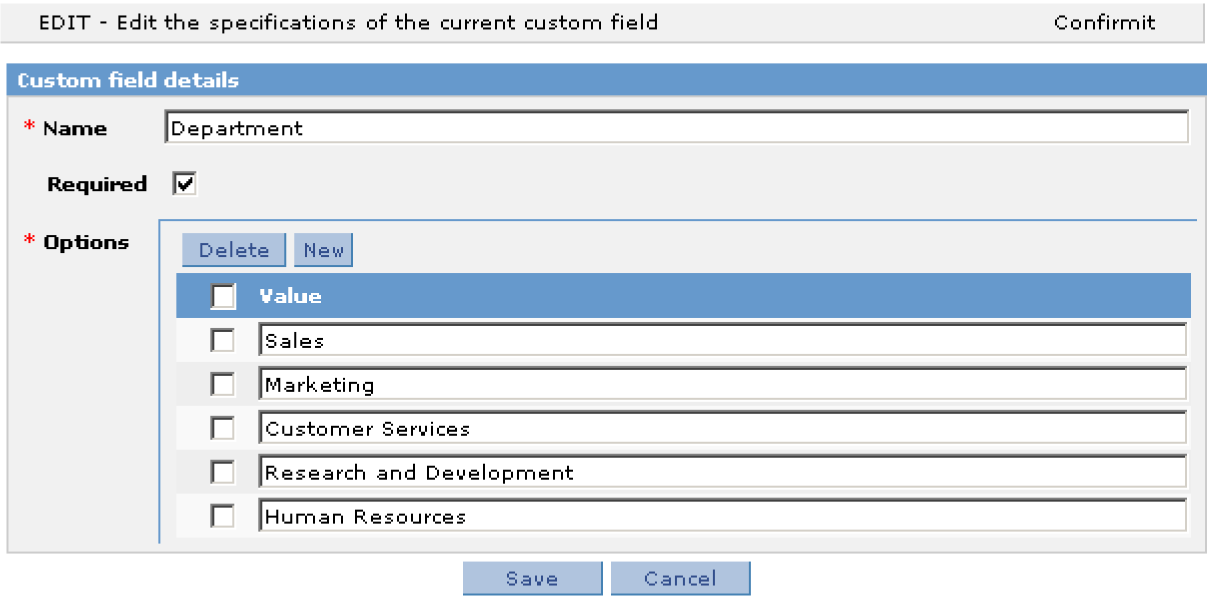


Figure 73 Example of a custom field type drop-down list

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

When a new custom field has been created, it will be displayed in the custom field list.

10.1.2. How to Add a New Option to the List

1. Click the **New** button or press the down-arrow key on your keyboard.

   A new row is added to the list.

2. Type in the appropriate text for the option.
3. Click **Save** to save the changes.

10.1.3. How to Delete an Option from the List

1. Click in the check box beside the option you wish to delete.
2. Click the **Delete** button.

   The custom fields are displayed in the Project Overview page. Only a user with Administration permissions to the project will be able to see the custom fields.

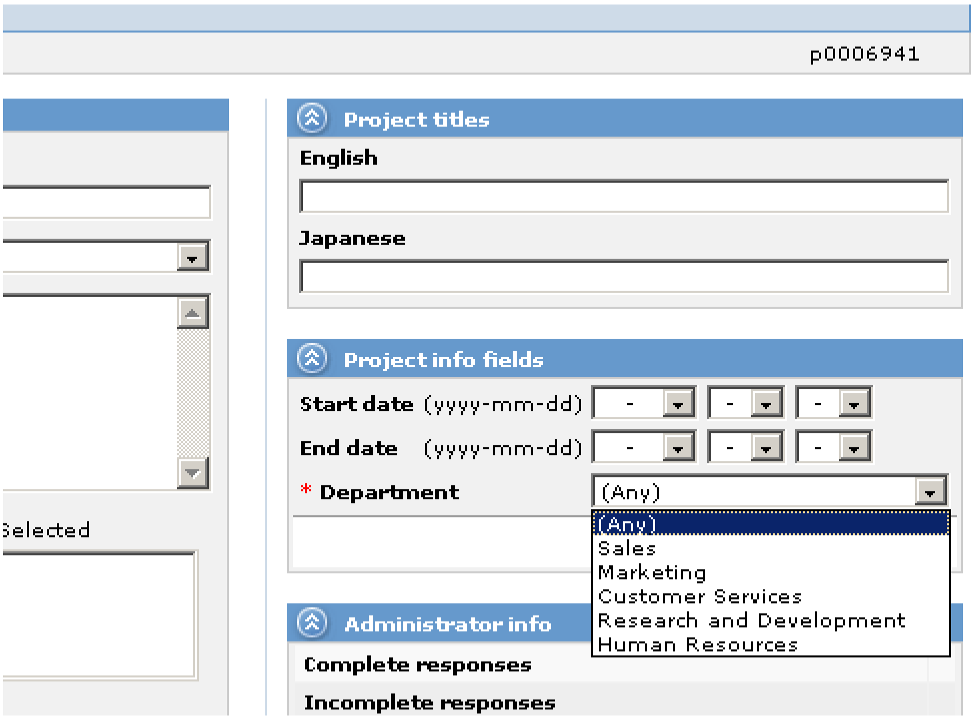


Figure 74 Custom fields in the Project Overview window

10.1.4. Administrator Project Overview

The Software Administrator and users with Administrator permissions to a project will have the following frames and fields on the Project overview page in addition to the Project Details frame (see section 2.1.1. Precode Validation for more information):

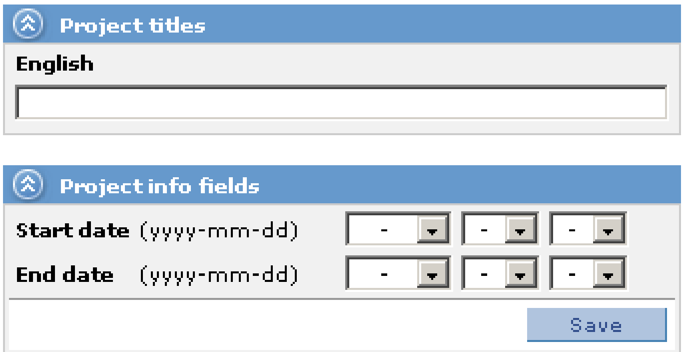


Figure 75 Project info fields

Figure 76 Administrator information

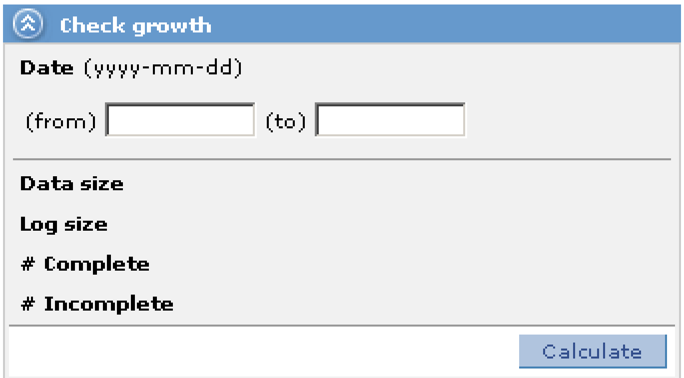


Figure 77 Growth information

The fields are as follows:

- **Start date** - Info field describing the start date of a survey.
- **End date** - Info field describing the end date of a survey (Note: Will not close the survey automatically.)
- **Complete responses -** Number of complete responses in the survey.
- **Incomplete responses** - Number of incomplete responses in the survey.
- **DB server name** - Name of the DB server where the project DB is located if multi server installation.
- **Size of database data** - Current size of database data.
- **Size of database log** - Current size of database log.
- **Questionnaire last modified** - Last time the questionnaire was modified.
- **WI last generated -** Last time the web interview was generated.
- **DB last generated -** Last time the database was generated.

- **Last response** - Last time a respondent accessed an element in the survey.
- **Reporting last accessed** - Last time someone accessed the online reporting module.
- **Project info last updated** - The last time all the project admin info fields were updated.
- **Data growth last day** - Growth in database data size during the last day.
- **Log growth last day -** Growth in database log size during the last day.
- **Data growth last week** - Growth in database data size during the last week (7 days).
- **Log growth last week** - Growth in database log size during the last week (7 days).
- **Data growth last month** - Growth in database data size during the last month (same day last month).
- **Log growth last month** - Growth in database log size during the last month (same day last month).
- **Custom fields (if defined)** - All defined custom fields.
- **Refresh** - Click to update all the administrator information above.
- **From date** - Use to specify the from date when checking the growth within a specified range.
- **To date** - Use to specify the to date when checking the growth within a specified range.
- **Data size** - The calculated database data growth from the range specified above.
- **Log size** - The calculated database log growth from the range specified above.
- **# Complete** - The calculated growth in complete responses from the range specified above.
- **# Incomplete** - The calculated growth in incomplete responses from the range specified above.
- **Calculate** - Perform the calculation and display the results on the page.
- **Recurring tasks** - A link to the recurring tasks for this project, if there are any.

10.2. Admin > Projects > Project Info Report

You can search for specific projects under **Projects > Project Info Report**.

1. Click the **Project Info Report** link to open the Search Criteria page.

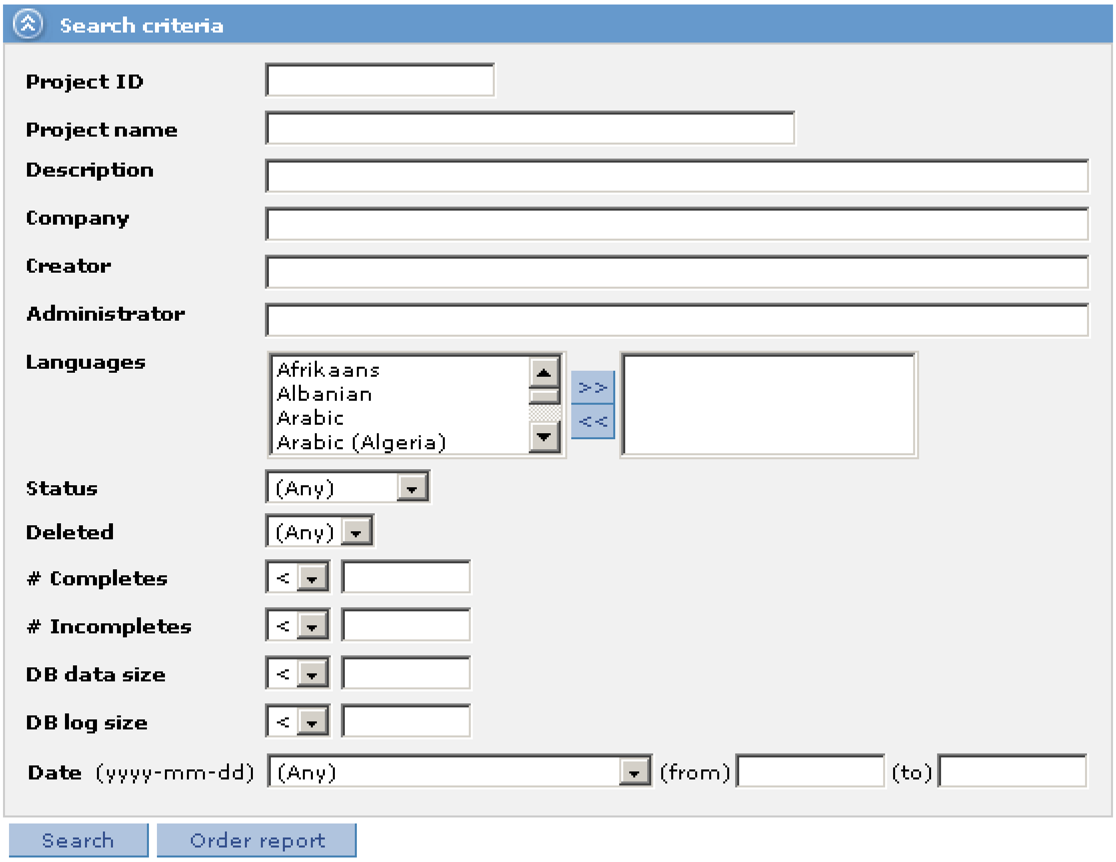


Figure 78 Project search page

On this page you can perform a search by entering search criteria in one or more fields. The fields are as follows:

- **Project ID** - Search by specific project ID number.
- **Project name** - Search by specific project name.
- **Description** - Search by text in project description.
- **Company** - Search by company name.
- **Creator** - Search by project creator name.
- **Administrator** - Search by project administrator names.
- **Languages** - Search by project languages.
- **Status** - Search for either Closed projects or projects in Production.
- **Deleted** - Search for projects that either have been deleted or have not been deleted.
- **# Completes** - Numeric field: search by a specific number of complete responses.
- **# Incompletes** - Numeric field: search by a specific number of incomplete responses.
- **DB data size** - Search by database data size.
- **DB log size** - Search by database log size.
- **Date** - Search by dates for specific actions, for example Created, project Start date, End date, last WI generation, etc.
- **Custom fields (here: Department)** - Search by specific custom fields.

2. Enter the appropriate search criteria and click **Search**.

   Any projects matching the criteria will be listed below the Search Criteria page.

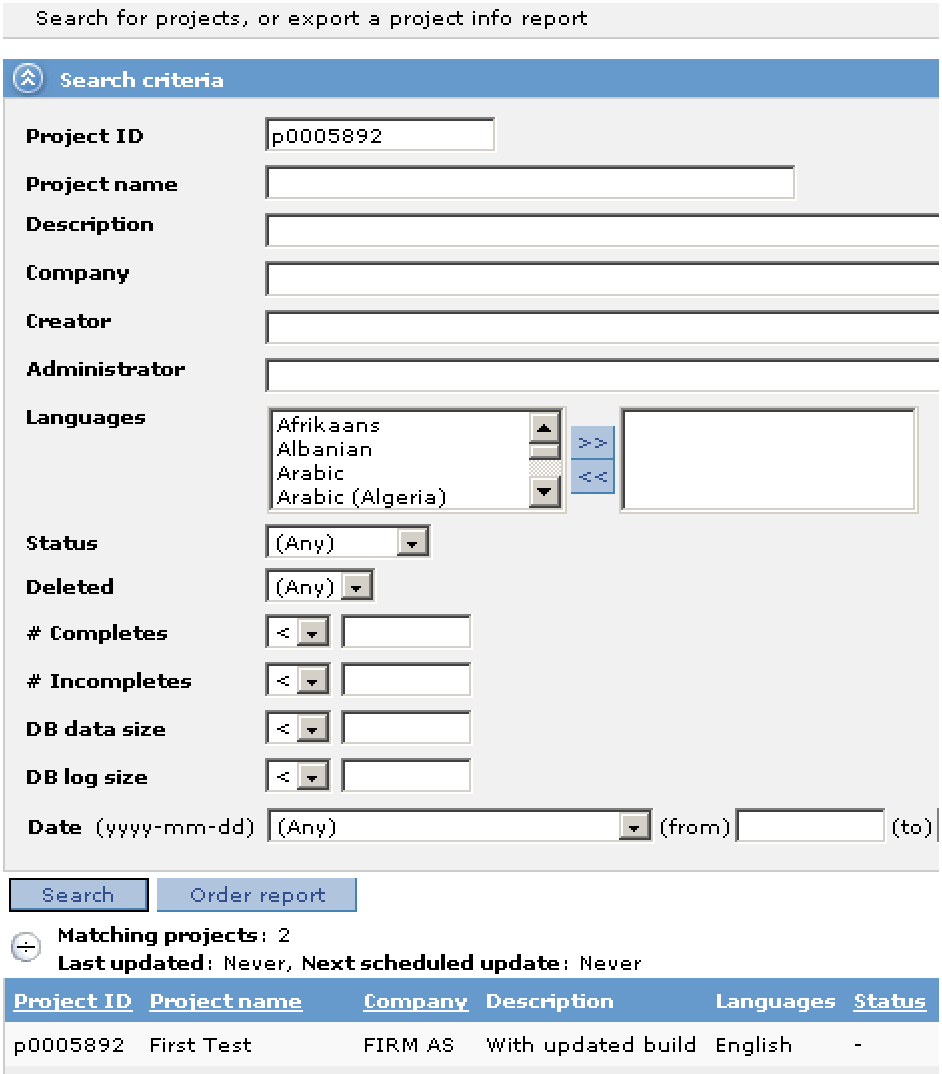


Figure 79 Search result listed below search window

You can hide or display the Search fields. Click the arrow button in the top-left corner of the Search Criteria page to toggle the fields.

Figure 80 Search fields are hidden

10.2.1. How to Order a Report

1. Click the **Order Report** button.

The Export Properties dialog opens.

2. Check that the email address to which the report is to be sent is correct.
3. Add any comments to the Comments field.
4. Select the desired Start Time. If you will have the report sent later, set the appropriate date and time.
5. Click **OK**.

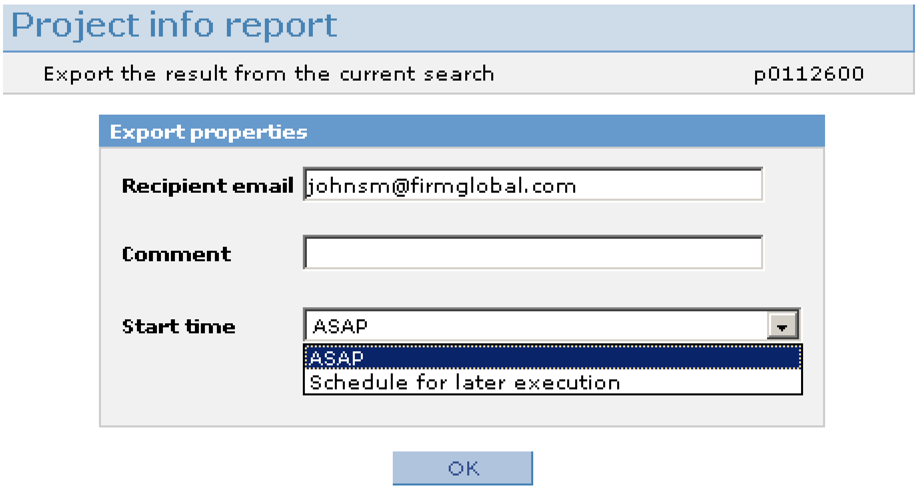


Figure 81 Search result to be sent by email

You can order the task “as soon as possible” or set it up as a Recurring task.

10.2.2. Project Info Collector

To ensure the data you receive when ordering a Project Info Export is always up-to-date, start the Project Info Collector task. This is a batch task that is set up to run at least once every 24 hours. Project Info Collector gathers data for all projects on the server. This information can then be ordered via the Project Info Export. If you want to view project information for a particular project only, go to the Project Overview page and click the **Refresh** button under the Administrator Info field.

After the task has been initiated by your server administrator, it will be located under Tasks. You can then change the recurrence pattern at any time.

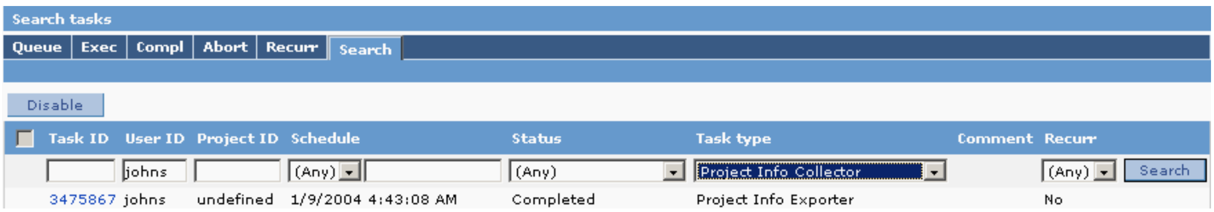


Figure 82 Project info collector / exporter tasks

The batch server should also be configured to run Project Info Collector tasks.

Figure 83 Server configured for project info collector/exporter

10.3. Admin > Projects > Project Log

All projects created on the server are listed with Userid, Project id, and the Date when they were created.

11. Admin > Languages and Messages

Note: Any changes you make to the parameters available here are global – that is, everyone who logs onto the server can see and use them!

11.1. Admin > Languages and Messages > Primary Languages

This window lists the primary languages registered in Confirmit, in alphabetical order. An identity code and a character set are specified for each primary language.

Note: The character set used for the languages may influence how the survey is displayed to the respondents in their browsers. The browsers also use a character set; in Internet Explorer this is selected under View > Encoding. If respondents have problems reading the survey, the reason may be that different character sets are used in the survey (Confirmit) and in their browser.

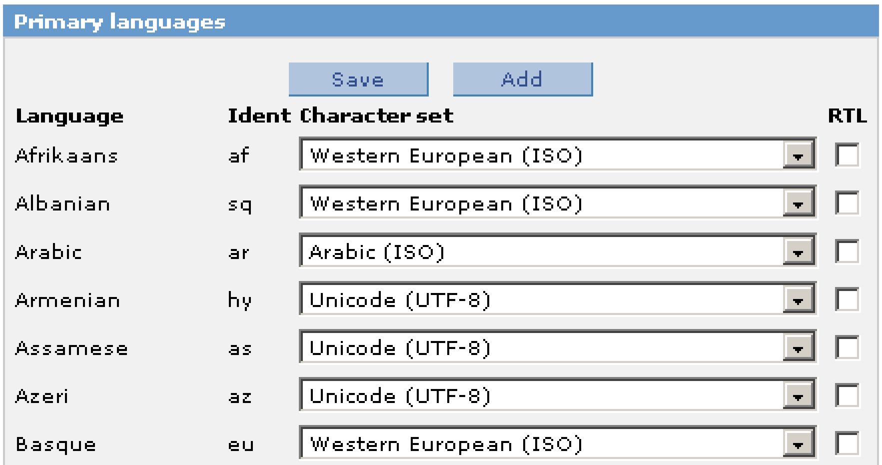


Figure 84 The Primary Language window

You can add new languages if necessary.

Note: Any changes you make to the parameters available here are global – that is, everyone who logs onto the server can see and use them!

11.1.1. How to Add a New Primary Language

1. Go to the **Admin > Languages and Messages > Primary Languages** menu command.

   The Primary Languages window opens.

2. Click **Add**.

   A new row is added to the list at position NN.

3. Scroll down to the new row and type in the name of the language and the identity code.
4. Open the drop-down list for the language and select a character set to be used.
5. Check the RTL box if you want the user to be able to read the page from right to left (for example if the survey language is Arabic).
6. Click **Save** to save the changes.

Note: Once you have saved the changes you will need to go to the Deploy Language info and Messages menu command to deploy the changes onto the server (see section 11.4. Admin > Languages and Messages > Deploy Language Info and Messages for more information).

11.2. Admin > Languages and Messages > Sublanguages

This window lists all sub-languages (if any) for the primary languages. When you add a new sub-language, you must choose the primary language first. This means that the primary language must exist in the Primary Language list.

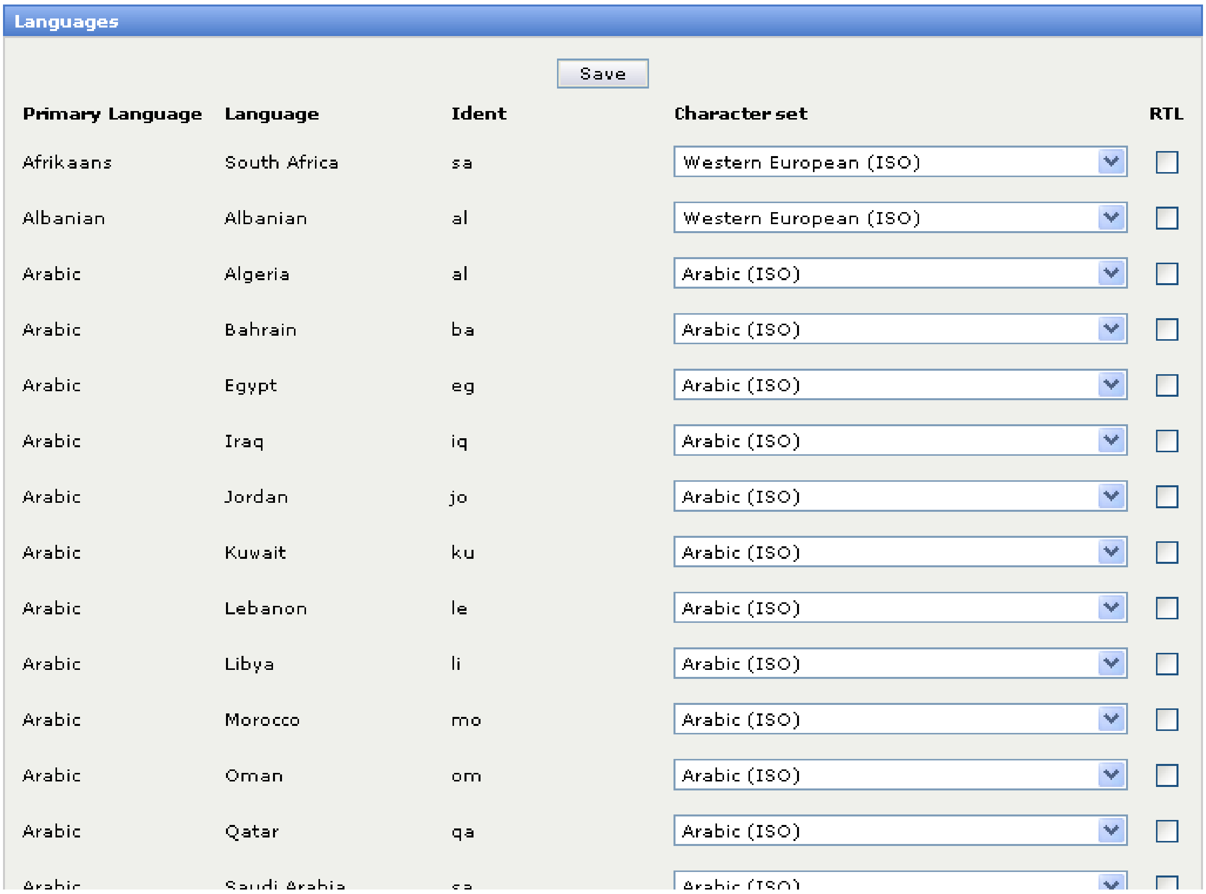


Figure 85 The Languages window

11.2.1. How to Add a New Sub-Language

Note: Any changes you make to the parameters available here are global – that is, everyone who logs onto the server can see and use them!

1. Go to the **Admin > Languages and Messages > Sub Languages** menu command.

   The Languages window opens.

2. Scroll down to the bottom of the sub-language list.
3. In the drop-down, select the Primary Language to which you wish to add the sub-language, then click **Add**.
4. In the open fields, enter the language name and Identity code.
5. Click **Save**.

Note: Once you have saved the changes you will need to go to the Deploy Language info and Messages menu command to deploy the changes onto the server (see section 11.4. Admin > Languages and Messages > Deploy Language Info and Messages for more information).

11.3. Admin > Languages and Messages > Survey Messages

Confirmit contains a large number of texts and messages of different types; for example the message that appears when a respondent forgets to answer a required question, the message that is displayed to a respondent when a survey is closed, the text displayed on the **Cancel** button etc. These texts and messages are already translated into a number of "standard" languages, and the user can specify that any of these languages are to be used by a project. For other languages, error messages will default to the main language. For example: if Venezuelan Spanish is the selected language, then the messages will be translated into Spanish. If a language is not available, the error messages will be displayed in English, this being the default language overall

However you may wish to have the messages displayed in a language that Confirmit does not provide as standard. Or perhaps you wish to change some of the texts and messages to suit your company, a particular survey or dialect.

Confirmit provides three levels of "message editing" functionality:

- **Site-wide -** available to the Site Administrator via the **Admin > Languages and Messages > Survey Messages** menu command. This level is described in this Administrator Manual.
- **Company level -** available to the Company administrator via the **Home** menu command. This level is described in this Administrator Manual.
- **Project level -** available to the project supervisor via the **Project Management > Survey Messages** menu command. This level is described in the Authoring User Guide.

Note: Messages edited at the Project level override any edited at the Company or Site level.

Note: If a project containing edited message texts is duplicated, the edited message texts will be included in the new project.

Under this menu item you can edit and translate all messages in Confirmit. You may change the translations provided by Confirmit by entering your desired translation in the Edit Local Text field. If you enter any text into this field and save it, then the text you have entered will replace that in the Current Text field and will be the text the respondent will see when that language is selected.

The primary languages and sub-languages are arranged in a hierarchy. For example, where French is the primary language, a sub-language is Canadian French. If no translated text has been entered for a message for Canadian French, then the French text is automatically displayed. If the messages have not been translated into the primary language (in this case French), then the English text is displayed to the respondents.

Note: Once you have saved the changes you will need to go to the Deploy Language info and Messages menu command to deploy the changes onto the server (see section 11.4. Admin > Languages and Messages > Deploy Language Info and Messages for more information).

11.3.1. How to Edit the Text of a Message

To edit a message:

1. Site-wide: Go to the **Admin > Languages and Messages > Survey Messages** menu command.

   Or

   Company-wide: Go to the **Home > Company > Survey Messages** menu command.

   The Site/Company Specific Survey Messages form opens.

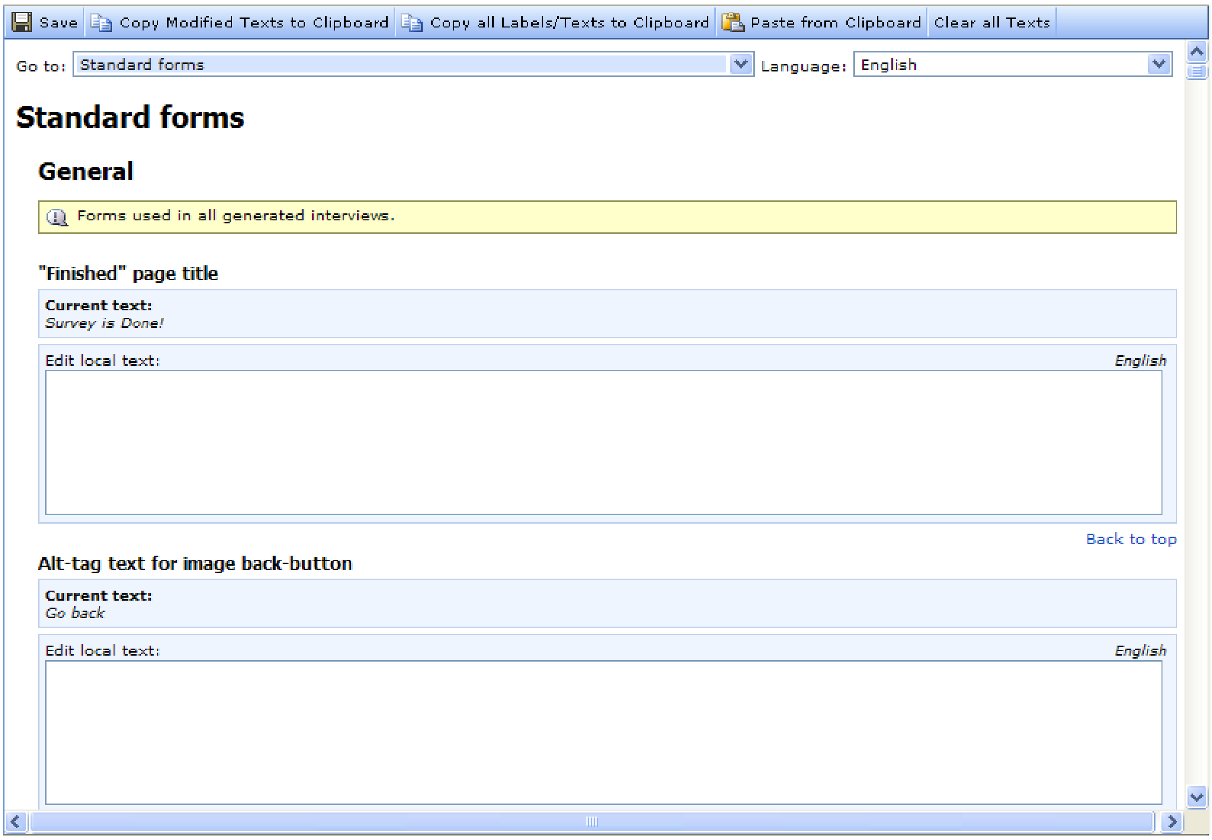


Figure 86 The Survey Messages form

2. To find a particular message, click the down-arrow beside the **Go to** field and browse to the required message.

   The messages are listed in logical groups; for example Standard - General, Standard - Login, Error - Numeric, etc.

3. If the project is available in several languages, select the message language you wish to edit.

   For example, if the project is available in English and French, you can edit just the messages that will appear for English-language projects, just the messages that will appear for French-language projects, or both.

4. Edit the message text as appropriate.

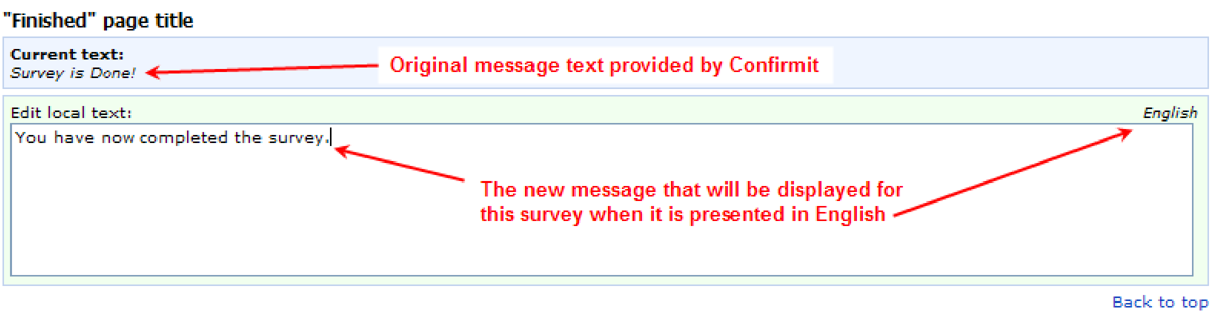


Figure 87 Editing a message text

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

The text you have typed into the Edit Local Text field will be moved up to the Current Text field. You must now deploy the changes (see section 11.4. Admin > Languages and Messages > Deploy Language Info and Messages for more information). The text will then be entered into the system, and will be displayed to the respondent instead of the original text supplied by Confirmit if/when the appropriate situation arises.

Note: If the project is duplicated, any edited message texts will be included in the new project.

11.4. Admin > Languages and Messages > Deploy Language Info and Messages

Any changes to the language parameters, for example the addition of a new sub-language, must be compiled and published on the servers before they can be used.

Note: Once changes have been compiled and published they are available for all!

To compile and deploy the changes:

1. Go to the **Admin > Languages and Messages > Deploy Language Info and Messages** menu command.

   A message box appears with a **Deploy** button.

2. Click the **Deploy** button.

   The deployment task starts and a progress pane opens. On completion an information message is displayed.

12. Admin > Multimode

The multimode component is used both for CATI capabilities and CAPI productivity. This means that there are two systems that need to communicate with each other. All communication between the two systems is channeled through a queue (specific for the company), and if a problem arises with the communication (perhaps there is an error in one task or a loss of communication), processing of the queue stops for that company. However the system then keeps track of all subsequent messages in the Sync Log. So while there are no problems, the Sync Log for the company will be empty.

If a problem arises with a task then subsequent tasks for that company will be queued and the log list will start to build up. In most cases the item at the top of the list will have an error associated with it. You can react to this message and repair the fault, or you can delete the problem task from the queue. If you repair the fault or delete the task it will clear the problem, and you can then restart the synchronization process and any tasks in the list will eventually be cleared. Assuming you are successful, the communication should then proceed as normal.

An example of the type of error message that will appear in the event a problem arises is shown in the figure below.

(1:47:48 PM) Updating quota-table...
(1:47:48 PM) Generating WI.Net...
⚠ (1:47:48 PM) A multimode synchronization issue has occurred, please contact support.
(1:47:48 PM) Reading survey schema...

Figure 88 Example of the type of error message that will be displayed in the event of a synchronization problem

If this error appears, then the administration personnel must investigate the problem.

The menu contains the following sub-menu:

- **Synchronize** - displays a list of the tasks that are queued, and allows you to synchronize any queued items for selected or all companies.

12.5. Synchronization Log

If there is a problem with the queue, then the queue processing will stop and users will be shown a warning when they attempt to perform tasks that require this queue, for example launching a CATI-enabled survey (the CATI part will not be loaded) or loading CATI respondent data. The Synchronization Log page then lists any items that are waiting to be synchronized. The log contains a description of the items, and you can sort and search in the list. Note that while there are no problems, the list will be empty.

If you have the SYSTEM_ADMINISTRATE or ProS access permission you will see a company selection field in the upper-right corner of the page. The drop-down list will include any companies to which you have access, that have tasks in the log queue (see section 12.1. Restarting the Synchronization Process for more information).

In most cases the oldest item in the log page list will contain the cause of the problem, and this item will usually have an associated error message indicating the cause. You then have two options:

1. Analyze the error message, repair the fault and re-start the synchronization process.
2. Delete the item containing the error and re-start the synchronization process.

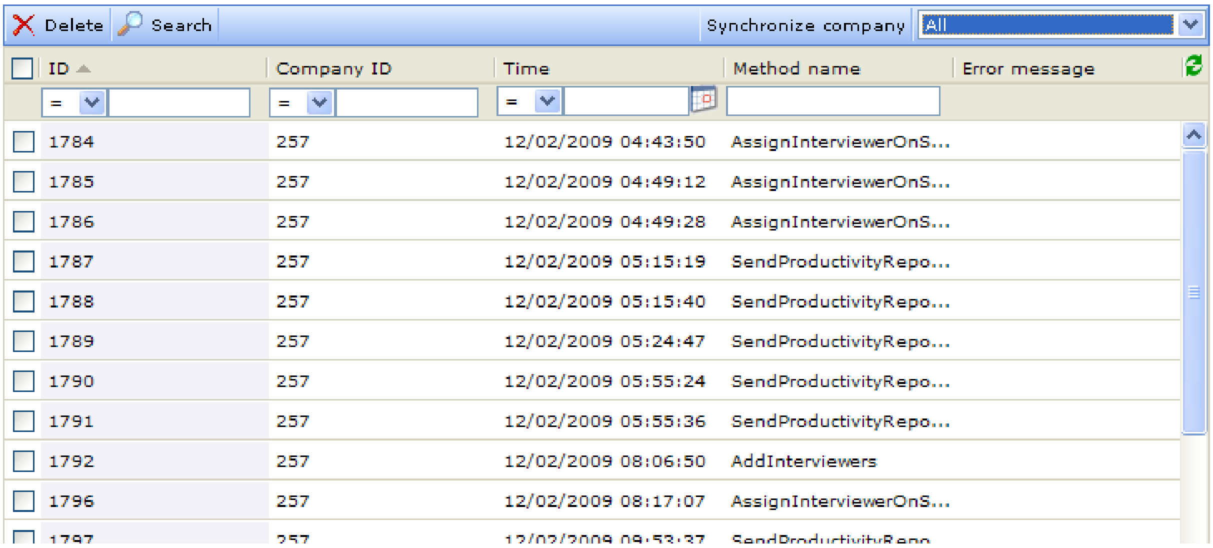


Figure 89 Example of the Synchronization Log page

12.1. Restarting the Synchronization Process

To restart the synchronization process:

1. Go to the **Admin > Multimode > Synchronize** menu command.

   The Synchronization Log page opens (see section 12.5. Synchronization Log for more information).

2. As required, click the down-arrow beside the Synchronize Company field located towards the upper-right corner of the page to open a drop-down list of the companies whose tasks have been logged, and select the company you wish to restart the synchronization process for.

   Note that you can leave **All** selected to restart the process for all companies in the list.

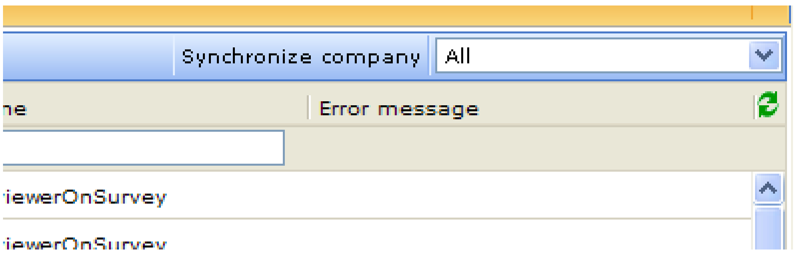


Figure 90 The Synchronize Company button and field

3. Click **Synchronize Company**.

Assuming you have cleared the fault that originally caused the process to stop, the process should now re-start and the items in the log should clear for the selected company.

13. Other Properties and Functionality

This chapter describes additional properties and functionality that do not fall naturally under any of the previous chapters.

13.1. Confirmit Express

This section describes the Confirmit Express admin functionality.

13.1.1. Express Library

When a user is working in Confirmit Express and has a survey that he/she would like to use as the basis of future surveys, perhaps because it has a “standard” layout, you as Administrator can save this survey as a template.

1. Open the survey in Express and go to the **Survey Details** tab.
2. Check the **Set survey as Express Library** box.
3. Click **Save Survey Details**.

The survey is now saved as a template, and will appear in the New Survey Options list. Refer to the Confirmit Express User Guide for further information.

Note: Surveys saved as Express Libraries will not be accessible in Reportal.

13.1.2. Approval and Approvers

When an Express user is created/registered, all surveys he/she creates must by default be approved by a supervisor before they can go live (be made available to the respondents). The administrator can give users permission such that they do not need to have their projects approved, and can also give “approver” permission to supervisors.

1. Go to the **Admin > Accounts > Users** menu command.
2. In the User List, select the user you wish to edit, or create a new user.
3. In the Permissions field, select the SYSTEM_EXPRESS_USER or SYSTEM_EXPRESS_APPROVER permission as appropriate.

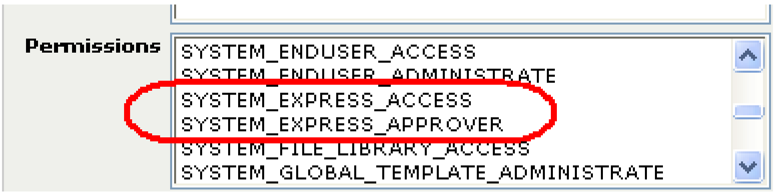


Figure 91 The SYSTEM_EXPRESS_.... permissions

4. Save the changes.

Note: When an Approver is allocated a survey to approve, he/she will automatically be given full editing rights to that survey.

13.1.3. System_Company_Express_Account_Administrate Permission

Users with this permission are allowed to manage Express users within their own company. The administrator can create, activate and deactivate users. Express users can have one of four statuses:

- **New** – when an Express user is added to Confirmit, the user will have the status "New". Users with this status will not be subject to licensing, but cannot use Express.
- **Pending** – the Express account administrator can activate one or more users depending on the licenses available. An email containing a link is sent to the activated user, and the user’s status will be upgraded to "Pending".

- **Active** – once a user's status is set to "Pending" by the administrator (see the point above), the user can enter the link in the email and create their own password. The user's status is then set to "Active", the license will be counted, and the user can run Express.
- **Deactivated** – the Express account administrator can at any time deactivate active users. This could for example be necessary prior to activating other users if there are not enough free licenses available. Note that only Account Administrators can set users as expired and set expiry dates; Express administrators do not have access to this.

Note: If a company has 50 Express licenses, the company could have for example 100 Express users in the database. However only 50 of these users can be active at a given time. Note also that if an active user's account expires, then that user's license becomes available to another user.

For further information on Confirmit Express, refer to the Express User Guide.

13.2. Batch Emailing Tasks

To enable server administrators to set up emails using fixed a domain and emails where the domain has been overridden from different IPs (to prevent the fixed domain from being blacklisted due to spoofing), emails will be sent as different task types depending on which sender address is used. Server administrators may distribute these tasks to different servers (different IP addresses). When the fixed domain email address is overridden, the ordinary batch email task type will be used.

The "Fixed Sender Domain" add-on provides a third level for respondent emailing. Each level has a designated task type. These task types are used to direct the different types of emailing to different servers, so that emails where the fixed sender domain is replaced (spoofing) are sent from different IPs than "fixed sender domain" emails.

The three task types are as follows:

- **Batch Emailing** is the task type used for such tasks. It is used if the "Fixed Sender Domain" or "Dedicated IP" add-ons are not set and activated, or if those are activated but the sender domain is overridden (spoofing).
- **Batch emailing - Fixed Domain** is the task type used for clients with the "Fixed Sender Domain" add-on set and activated, as long as the fixed domain is not overridden.
- **Dedicated IP address** is the task type for emails sent from customers that have the "Dedicated IP address" add-on set and activated, unless the fixed domain is overridden.

The Business rules for the task types are as follows:

- If the "fixed sender domain" add-on is not set, the Initiating task will be Batch Emailing.
- If the "fixed sender domain" add-on is set and activated, and the email domain is overridden (to something else), then the Initiating task will be Batch Emailing.
- If the "fixed sender domain" add-on is set and activated, and you use the sender domain (site-wide or company specific), then the Initiating task will be Batch Emailing - Fixed Domain.
- If the "dedicated IP" add-on is set and activated for the company, and you use the sender domain, the Initiating task will be Batch Emailing - Dedicated IP address.
- If the "dedicated IP" add-on is set and activated for the company, and you override the sender domain, the Initiating task will be Batch Emailing.

13.3. Switching Company

Users with system_administrate and/or system_project_administrate can switch to another company and work in Confirmit as if you are registered in that company. This functionality may be useful if you need to edit projects created in a company other than your own.

A **Switch Current Company** option is also available in the root node in the File Library page hierarchy. This allows administrators to see and upload files to other company's folders.

Note: Switch Company does not function for CAPI/Kiosk when sending the Activation files and certificates. Activation files and certificates can only be sent by "you" from the company in which you are registered.

Note: The "current" company will be reset whenever you log in to Confirmit. The default company is that in which you are registered.

Note that when accessing the **CATI > Switch Company** or the **CAPI/Kiosk > Admin > Switch Company** menu commands, Confirmit will display a list of all companies to which you have access that have a multimode instance enabled, not just those with the CATI or CAPI add-on respectively.

13.4. Debug Station

Confirmit Debug Station is a downloadable application provided as part of the Confirmit license, to be used for debugging script code in Confirmit surveys.

Important:
Confirmit Debug Station is a specialist feature that is intended to be used only by programmers who write advanced scripts as part of their surveys and who need to debug the script code. You must accept the terms of use as stated on the download page in Confirmit before you can download the application.

Note: The Debug Station is not supported on users' pcs. All support required for this feature is chargeable.

Confirmit Debug Station must be installed on the user's PC along with a third-party .NET debugging application such as Visual Studio 2005. Confirmit Debug Station can then be used to run Confirmit surveys locally on the user's PC, attached to the .NET debugger, to debug script code in the survey (script nodes, precode masks, question masks, conditions, validation code and piping).

Launch the survey for debugging, synchronize it to the debug station, and then attach the .NET debugger to the debug station. Set breakpoints in the usercode, then when the survey starts, the debugger will pause the survey when it comes to a break-point in the code.

13.4.1. How to Install the Debug Station

1. Open a project and go to the **Designer > Quality Control > Debug Survey** menu command.

   A page of information including several links opens.

2. Click the link in the text to download the Debug Station, then follow the instructions displayed.

Note: If you already have CAPI installed from author.testlab.firmglobal.net server, then you do not need to install Debug Station. Merely replace the activation files.

13.4.2. How to Run the Debug Station

1. Log on to Confirmit and select a project from the project list.
2. Go to the **Professional Designer > Quality Control > Debug Survey** menu command.

   A page of information including several links opens.

3. Click the **Debug Survey** button to launch the survey for debugging.

   The Task pane opens and the launch task is run. This launch will not require or update the survey database.

4. Start Confirmit Debug Station.
5. Start the debugging software and attach it to the Confirmit Debug Station process.
6. In the debugging software, open the **GeneratorCode.js** file (containing the script code) for the survey you wish to debug.

   The file is located in **C:\Program Files\confirmit\data\surveys\wi\pxxxxxxx**. You can now set break points in this file.

7. Select the project in Confirmit Debug Station and start the interview. The debugger will pause the survey when it comes to a breakpoint in the code.

Note: Any interview data collected while the console is in Debug mode will not be synchronized back to the server.

13.5. Confirmit LDAP Logon

The LDAP Logon add-on allows user's in companies with the On-Premise license to re-use their local logon credentials when logging on to Confirmit. This will reduce the company's total maintenance of user credentials for their applications. Access to the component is controlled in the Confirmit license file.

The add-on functions as follows:

1. An employee clicks the link to the company's internal installation of Confirmit.
2. Confirmit displays a login page asking for the user's UserName and Password.
3. The employee enters his/her internal "company" UserName and Password.
4. Based on the information provided, Confirmit uses LDAP to perform a directory lookup in the company's Directory. A successful lookup will log the user into Confirmit.
5. On the first login attempt a Confirmit user will automatically be created.

13.5.1. Configuration

After the functionality has been installed and enabled, it must be configured using the System Configuration interface available for system administrators, as displayed in the figure below.

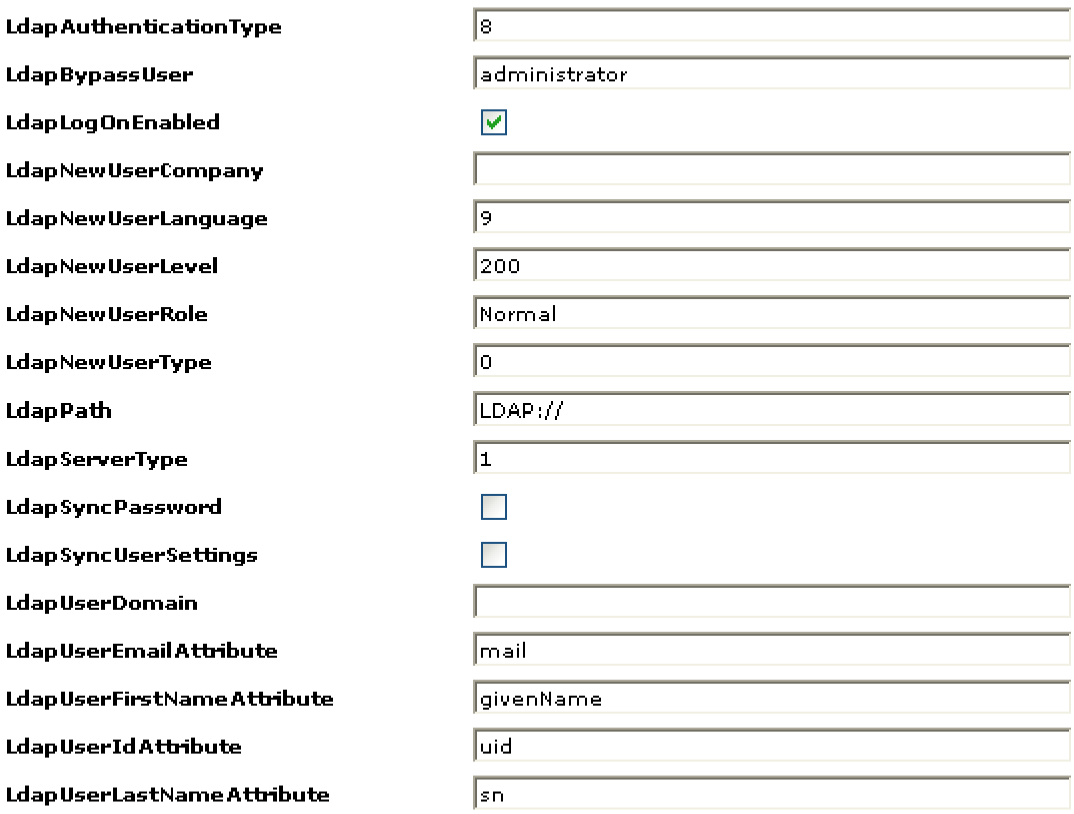


Figure 92 The System Configuration interface

The table below describes the site-wide settings and their use:

Configname	Type	Description
LdapLogOnEnabled	Bool	If enabled, LDAP directory authentication will be used when logging on to Confirmit. If disabled, normal Confirmit authentication will be used.
LdapSyncPassword	Bool	If enabled, the Confirmit user will be given the same password as the LDAP directory user, and this will be kept in sync by performing a synchronization when the user logs on to Confirmit. If disabled, the Confirmit user will be given a random, strong password when created.
LdapSyncUserSettings	Bool	If enabled, the user settings (first name, last name, email) will be kept in

		sync with the values found in the LDAP directory by performing a synchronization every time the user logs on to Confirmit. If disabled, the user settings will not be synchronized, but remain the same as when the user was created.
LdapPath	Text	Path to LDAP directory.
LdapAuthenticationType	Int	Authentication type. 1 = Anonymous 2 = Delegation 3 = Encryption 4 = FastBind 5 = None 6 = ReadonlyServer 7 = Sealing 8 = Secure 9 = SecureSocketsLayer 10 = ServerBind 11 = Signing
LdapServerType	Int	Directory server type. 1 = MS Active Directory 2 = OpenLDAP
LdapUserDomain	Text	Specifies the domain of the directory user. Not always required depending on server type.
LdapBypassUser	Text	Specifies Confirmit user that can be used to bypass LDAP logon.
LdapUserIdAttribute	Text	Specifies the directory attribute that is used when searching for user in directory.
LdapUserFirstNameAttribute	Text	Specifies directory attribute that is used to provide the first name of the Confirmit user that is created during LDAP logon.
LdapUserLastNameAttribute	Text	Specifies directory attribute that is used to provide the last name of the Confirmit user that is created during LDAP logon.
LdapUserEmailAttribute	Text	Specifies directory attribute that is used to provide the email address of the Confirmit user that is created during LDAP logon.
LdapNewUserCompany	Text	Specifies company name of the Confirmit user that is created during LDAP logon. Must be a company that has already been defined in Confirmit.
LdapNewUserLanguage	Int	Specifies language code of the Confirmit user that is created during LDAP logon. Must be a valid language code.
LdapNewUserLevel	Int	Specifies “level” of the Confirmit user that is created during LDAP logon. Must be a valid level code. 0 = None 100 = NoAccess

		105 = Express 110 = Translator 200 = Professional
LdapNewUserRole	Text	Specifies “role” of the Confirmit user that is created during LDAP logon. Must be a role that has already been defined in Confirmit, if specified.
LdapNewUserType	Int	Specifies “type” of Confirmit user that is created during LDAP logon. Must be a valid type code. 0 = Normal 1 = Test 2 = Training 3 = Trial 4 = ExpressConnect

13.5.2. New Confirmit User

If the module has been activated, enabled and configured correctly, authentication will be performed using the LDAP directory for every user (except for the username specified in the LdapBypassUser config setting). If the user has never logged on before, a new Confirmit user will be created if the directory authentication is successful. The user will be configured according to the values entered in the config settings (company, language, level etc.).

13.5.3. Fallback

If LdapSyncPassword is enabled, this new user will be given the same password as the directory user. This will enable to user to log on successfully in the future in the event of an LDAP failure (service unavailable etc.), or if the module is disabled. If LdapSyncPassword is disabled, the new user will be given a random (but strong) password, so it will be impossible to log on with the user if LDAP Logon isn’t operational.

13.5.4. User Settings

When a new Confirmit user is created, the user will be given the same first name, last name and email address as found in the directory attributes specified in the config settings for the directory user. If LdapSyncUserSettings is enabled, these values will be kept in sync (synchronized when user logs on) and it will not be possible for the user to change these values in Confirmit.

13.5.5. Troubleshooting

Errors related to LDAP Logon will be written to the Activity Log. It is possible to search through this log using the System Activities interface that is available for system administrators, as shown in the figure below.

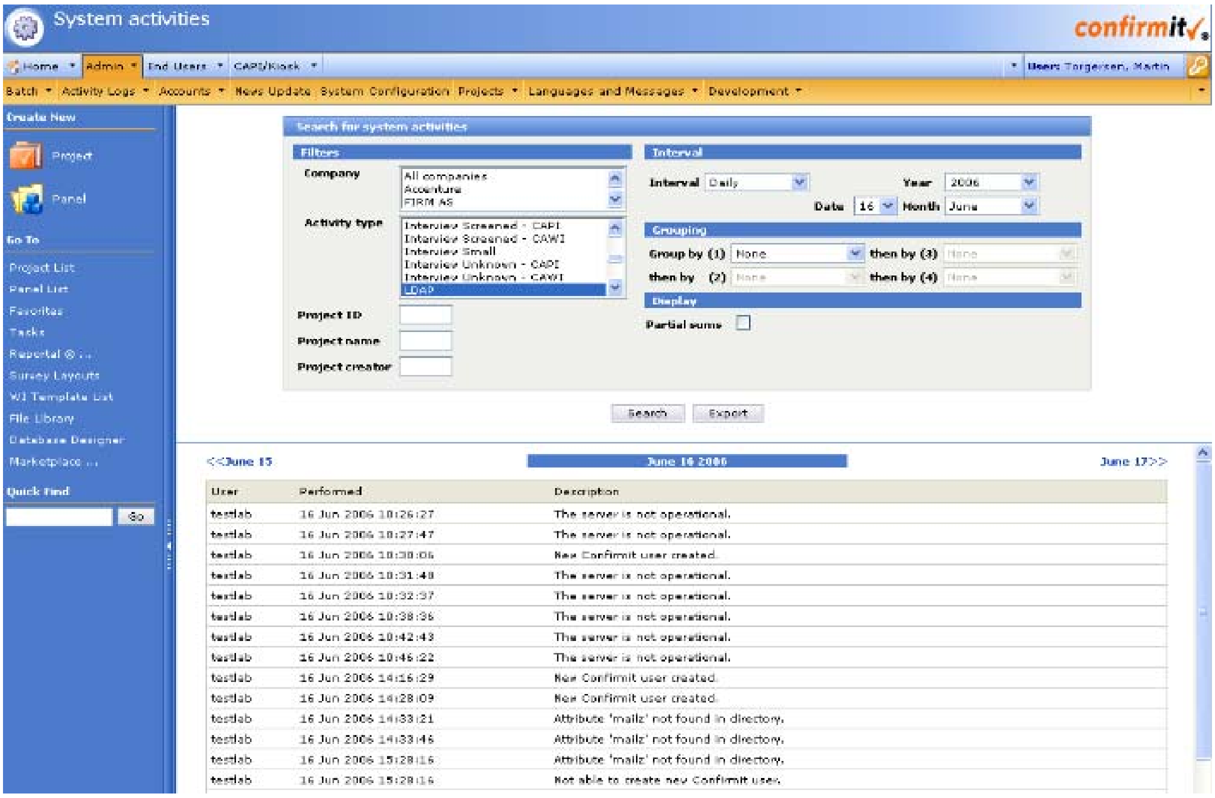


Figure 93 Example of the System Activities page

The search results will display events that occurred during the specified interval, and can be exported to a tab delimited text file for further investigation.

13.6. The Single Sign-on Functionality

Note: SSO is a company add-on and is subject to payment. If the client company does not have the add-on, then the SSO option will not be available in the Web Options page for a survey (refer to the Authoring User Guide), and the External Username field will not be available on the User Details page (see section 6.1.3.1. User Details for more information).

The Single Sign-on (SSO) functionality enables clients to use their own company authentication infrastructure when logging on to the Authoring environment, Reportal (designers and report viewers) and limited surveys. If a respondent has already logged on to the company system, they will be able to access the survey without the requirement for additional in-logging.

For a client to be able to use SSO, the client must provide Confirmit with a 256-bit AES key for establishment of the trust, and this should be done over a secure file transfer channel. This key is supplied in the Company Details page (see section 6.4.2. The Company Details Page for more information). This key will be used when decrypting the tokens that are presented by the users during login. The SSO company add-on must also be enabled for the client.

The External Username field in the User Details page (see section 6.1.3.1. User Details for more information) should contain a combination of <company>_<username>, where company is a constant configured in SSO and username is the username the user has in the external system and which is also provided through SSO.

Authentication:

1. SSO authentication is performed by sending a clear-text company identifier (“co”) and an encrypted token (“key”) via HTTP(S) POST or GET to a Single Sign-on enabled login page in Confirmit.

- The “co” parameter should contain the client company id.
- The “key” query parameter should have a value equal to the base 64 encoding of the encrypted value of the string composed of semi-colon delimited key value pairs for id, timestamp, and in some cases destination URL:
  - id – Confirmit user id

- o ts - UTC timestamp of the form “2007-01-10 23:39:39”
- o url - Destination URL

Sample decrypted “key” value: id=abc123;ts=2007-01-10 23:39:39

2. The value for the “key” parameter must be encrypted by the client using the same 256-bit AES key that was sent to Confirmit previously when enabling SSO. ECB blocking and PKCS5 padding must be utilized.
3. Confirmit will attempt to decrypt the “key” parameter using the key associated with the client identified by the “co” parameter. If this fails, the authentication request will be rejected. Otherwise authentication will be successful as long as the timestamp parameter is not older than a predefined (but configurable) number of seconds. This leeway is used to address lack of systematic clock synchronization across client and Confirmit systems. Every effort should be made to reference a common time source and narrow the timestamp timeout period. After a successful authentication, authorization is performed using the decrypted “id” value.

Surveys:

Generic SSO can be used to access open surveys. If it is, when returning to an already started interview via the use of “__sid__” or “r” and “s”, if “co” and “key” are also supplied, the “username” field is updated with the value of “id” from the “key” parameter. This behavior is introduced in Confirmit Horizons v14 patch 15.

To use Generic SSO when logging on to a limited survey, the survey must be deployed as “Single Sign On survey". This option is selected under **Survey Settings > Web Options > Survey type**, which is available if the user's company has the SSO add-on. Note that SSO requires respondents to be uploaded with a "username" column.

The survey can then be accessed using two different endpoints:

1. Normal survey link: **<deployment server url>/wix/<project id>.aspx**.
2. SSO survey link: **<deployment server url>/wix/sso.aspx**. In this case the Destination URL parameter should be used, and given a value that equals the normal survey link. The user will be redirected to this URL after successful authentication.

The “co” and “key” parameters must of course be included to enable the authentication.

If SSO is used to access an interview, after the respondent is located by “__sid__”, the “username” value is matched against the “id” value in the “key” parameter. If the values do not match, the interview will not start.

13.7. Password Policy

As part of the continuous effort to ensure that Confirmit complies with the highest standards of security, the following password policy applies from the introduction of Confirmit 14, for end users (CAPI interviewers, report viewers, Analysts and Designers) and Authoring users (Express, Professional and Translator).

General:

System messages are provided (with translations to the usual common languages) for these settings. The appropriate error messages will be displayed when users choose passwords that do not comply with the site settings.

From Confirmit Version 14, the Authoring (Express and Professional), Reportal and Community Portal modules all have ‘Forgotten Password’ functionality. This allows end users to trigger an email so they receive an activation link that opens a page where they can reset their password.

All passwords are hashed and not transmitted in plain text. From Confirmit 14, passwords of panelists in Community Panel and Basic Panel will be also be hashed. Consequently, passwords will not be available in plain text for any system users. Instead, users will be sent an activation link to open a page where they can choose their own password.

Panelists:

The changes to the password policy for Panelists are optional, and users must actively enable the restrictions for Basic and Community Panels. Users may then define custom settings for a panel. Panelist passwords will be hashed, meaning that passwords will not be available in plain text. When panelists use the “Forgot password” feature, they will be sent an activation link which will open a page where they can reset their password. Refer to the Community Panels User Guide for further details.

On-Premise users:

The following configurable settings will be enforced for all On-Premise users with the release of Confirmit 14. If the Company Administrator selects to use the settings, users will have to comply with these settings when changing their password:

- **Password history** - the new password must be different from the last X passwords.
- **Minimum age** - the user will have to wait X hours after changing the password before being allowed to change it again.
- **Maximum number of login attempts** - after X invalid login attempts the account will be locked. The user will not be allowed to login again until the account is reactivated by the system administrator.
- **Non-alpha-numeric characters** - a required minimum number of characters that are not numbers (0..9) or letters (a..z, A..Z).
- **Uppercase characters** - a required minimum number of uppercase letters.
- **Non-alpha characters** - a required minimum number of characters that are not letters (a..z, A..Z).
- **Password length** - a required minimum number of characters in the password.
- **Password expiry days** - the password will expire after a number of days. (This will not apply for login to the CAPI console.)
- **Password strength** - in addition to a combination of the above settings, a regular expression may be used to enforce an even stricter policy.

For Authoring users, it is possible to enforce even stricter requirements through certain company settings.

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