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# Confirmit Horizons CAPI/Kiosk User & Administrator Guide

This is document revision 1 of the Confirmit Horizons v22 CAPI/Kiosk User & Administrator Guide published in March 2017. The information herein describes Confirmit Horizons CAPI/Kiosk and its features as of Build nr. 22.0.63. New features may be introduced into the product after this date. Go to [www.confirmit.com](http://www.confirmit.com) or check "News" on the Customer Extranet for the latest updates.

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

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## What's New in this Issue?

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

The following changes have been made in revision 1 of the Confirmit Horizons v22 CAPI/Kiosk User & Administrator Guide:

- The Confirmit version and document revision numbers are updated to Confirmit v22. No other changes are made.

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

### **Important**

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

## Glossary of Terms

CAPI	Computer Assisted Personal Interviewing - Data collection method enabling an interviewer to perform face to face interviews, and register responses off-line directly into a program. Data transferred upon connection to network.
CAWI	Computer Assisted Web Interviewing.
Default	A parameter value or system setting that is applied automatically by Confirmit unless the user changes it to a different value or setting.
Info	A field in a question page that provides information to the user.
Kiosk	A “self-service” version of CAPI, where the respondent operates the console and answers the questionnaire without an interviewer in attendance.
Grid question	A survey question type that comprises a set of related single questions, where the possible answers are laid out in a grid. The respondent can choose one answer per row in the grid.
Multi question	A survey question type in which the respondent can choose a number of answers from a set.
Open question	The respondent can type in free text, for example his/her name.
Panel	A large group of people who have agreed to be respondents in surveys. Samples from this group are chosen according to defined criteria to participate in a particular survey.
Panelist	A member of a panel.
Respondent	A person who replies to a questionnaire. A panelist who has been selected for a particular survey.
Sample	A set of panelists who are valid according to the applied criteria to be used in a survey.
Single question	A survey question type in which the respondent can choose one answer from a set.
UserID	User Identification. Part of the user’s identification details. The UserID must be typed into the logon dialog along with the user’s password to start Confirmit.

# 1. Confirmit Horizons CAPI/Kiosk

**Note: Confirmit Horizons CAPI/Kiosk is a chargeable add-on. If your company has not licensed the CAPI/Kiosk add-on then the CAPI menus and associated options will not be available or visible in your Confirmit system.**

Confirmit Horizons CAPI (Computer Assisted Personal Interviewing) and Confirmit Horizons Kiosk (for self-completion, set up for example in shopping malls, airports, etc.) are built on the Confirmit web-based platform. This enables the same advanced and sophisticated capabilities typical to online surveys to be used for offline face-to-face field work or for self-completion of the surveys. Multimedia elements such as advertising commercials, complex survey logic, advanced quota control and multilingual interviewing can be included in the surveys.

The Confirmit platform is a 100% integrated application. Confirmit users benefit from one common authoring environment that allows them to design surveys and manage projects and interview quotas, regardless of the data collection mode employed. Both CAPI/Kiosk and CAWI take advantage of Confirmit Reportal.

As either an On-Demand hosted solution or a server installation, the Confirmit platform provides centralized control of face-to-face field work. It allows the centralized distribution via the Internet of new and updated surveys to the CAPI/Kiosk-enabled devices, and centralized sample management and communication with the interviewer workforce.

Interviewers connect to the Internet before commencing their field work, to synchronize new or updated surveys and receive instructions from their supervisor. They can reconnect during the field work or on completion to synchronize the response data with the central Confirmit platform. The interview stations used for the Confirmit Kiosk version are synchronized to the central platform in the same way as CAPI Interview stations.

Confirmit enables businesses to conduct projects on both CAWI and CAPI/Kiosk using different samples running in parallel and thus increase their audience. Confirmit surveys and reports are designed and managed on the same integrated platform, enabling organizations to choose the preferred method of mixed mode data collection that best supports their particular business and/or methodology objectives.

## 1.1. Features

Confirmit Horizons CAPI/Kiosk provides the following CAPI/Kiosk-specific components in addition to the proven Confirmit platform for survey design, survey translation, online data collection, and report creation and distribution. For more information, refer to the Confirmit Authoring and Confirmit Reportal User Manuals.

- **Supervisor Module** - this is fully integrated with Confirmit and provides interviewer management, sample management, a messaging system (see the note below) for communication with the interviewers, and synchronization status reports on the project progress.
- **Interviewer Console** - this is usually installed on standard offline Tablet PCs or other Windows-based devices. It provides access to Confirmit surveys that are deployed by a CAPI supervisor and assigned to an interviewer. It allows control of these surveys (start, stop, cancel, postpone and restart interviews), and access to a messaging system (see the note below) to enable the interviewer to communicate with the supervisors.
- **Confirmit Kiosk** - the application for self-completion of surveys offline. Agencies and companies can use this application to conduct on-site self-interviewing activities such as customer experience measurement, mall interviewing and on-site product testing. Confirmit Kiosk integrates fully with the web-based Confirmit platform. Companies can use Confirmit Kiosk as an interviewing station when Internet access is not available, downloading the data to the server on completion. Companies can also employ Confirmit Kiosk stations as an alternative to paper surveys, thereby reducing costs, time, and the errors inherent in traditional paper methods.
- **Synchronization** - can only be performed when the Interviewer Console is connected to the Internet. During the synchronization process, new or updated surveys, personal quotas and samples are downloaded to the interviewer console, communication between the supervisor and the interviewer is updated, response data is uploaded to the central server, and new Interviewer console applications are automatically downloaded and installed on the interviewer's console. In addition, the interviewer is checked to establish whether he/she is in the same company as the survey, and if not, the **capiccommon** and **pxxx** folders (if any) in the company file library are downloaded to the console.

**Note: Messaging is not supported on the CAPI app.**

The following chapters explain the features in greater detail, and describe how to install and set up CAPI/Kiosk consoles ready to conduct surveys.

## 1.2. System Requirements

The software listed below must be installed on the Interviewer Console:

Confirmit Horizons CAPI requirements (interviewer console)		
Element	Minimum	Recommended
Operating System	Windows Vista SP2.*	Windows 7* or Windows 8*
Memory	1 Gb	(same as minimum)
CPU	2 GHz or greater.	(same as minimum)
Web browser	Internet Explorer 8.	Internet Explorer 11
Operating System Extras	Microsoft .NET framework 2.0 - <a href="http://www.microsoft.com/downloads/details.aspx?FamilyID=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5&amp;displaylang=en">http://www.microsoft.com/downloads/details.aspx?FamilyID=0856EACB-4362-4B0D-8EDD-AAB15C5E04F5&amp;displaylang=en</a>  Microsoft .NET framework 4.5 <a href="http://www.microsoft.com/en-US/download/details.aspx?id=30653">http://www.microsoft.com/en-US/download/details.aspx?id=30653</a>	(same as minimum)
Operating System Extras	Microsoft Web Services Enhancements (WSE) 3.0 runtime - <a href="http://www.microsoft.com/downloads/details.aspx?familyid=9E59C3FB-E7BC-4D91-908E-411A8D329F3D&amp;displaylang=en">http://www.microsoft.com/downloads/details.aspx?familyid=9E59C3FB-E7BC-4D91-908E-411A8D329F3D&amp;displaylang=en</a>	(same as minimum)

\*Dial-up connections have not been tested under 64bit operating systems and are therefore not supported.

**Note: Windows 8 RT edition is not supported.**

**Note: CAPI requirements (except OS and Web browser) will be installed automatically by the Confirmit Horizons CAPI setup application if not already installed. Confirmit Horizons CAPI automatically installs .NET 2.0, .NET 4.5 and WSE 3.0 if not already installed.**

**Note: Internet Explorer must be set as the default browser during CAPI Console installation. After the installation is completed, you can change the default browser to a different system if required.**

**Note: Ensure that for any media content delivered through CAPI surveys, an appropriate player is installed and operational on the CAPI device. The player, for example Flash, must be operational before any attempt is made to perform an interview in the survey using the media.**

For Confirmit Authoring requirements, refer to the Confirmit Authoring User Guide.

## 1.3. Password Policy

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

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. 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.

### On-Demand users:

The passwords for all areas of Confirmit must satisfy the same minimum requirements for complexity. Wherever passwords can be changed or set within the application, they will be validated against these rules before the change is accepted.

- **Password history** - the new password must be different from the last 12 passwords.
- **Minimum age** - the user will have to wait 24 hours after changing the password before being allowed to change it again.
- **Maximum number of login attempts** - after 5 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.
- **Uppercase characters** - the password must contain at least 1 uppercase letter.
- **Non-alpha characters** - the password must contain at least 1 character that is not a letter (a..z, A..Z).
- **Password length** - the password must contain at least 8 characters.
- **Password expiry days** - the password will expire after 60 days. (This will not apply for login to the CAPI console.)

For Authoring users, it is possible to enforce even stricter requirements through certain company settings. Contact Confirmit support if you wish to implement a stricter policy.

### On-Premise users:

The following configurable settings are enforced for all On-Premise users. 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. The server documentation that will be provided with the release will contain more detail.

## 1.4. Console System Languages

The CAPI/Kiosk console's menu system, buttons and system messages can be presented in a number of languages. These now include Arabic, Chinese (Mandarin), German, Indonesian, Japanese, Korean, Russian, Thai, Turkish, and Vietnamese.

You change the system language as follows:

1. When logging on to the console, go to the **Tools > Settings** menu (see Console Settings on page 65 for more information).
2. In the Default Language field, select the language you wish to use.
3. **Save**, and close the dialog.

## 2. Installing and Activating CAPI/Kiosk on Interviewer Stations

**Note:** You can install the CAPI Console onto as many laptops as you wish. However the number of CAPI Consoles that can be active at one time is restricted to the number of stations licensed. For example, if your company has licensed 10 CAPI Consoles, and installs the CAPI Console onto 12 laptops, all 12 consoles can be used but only 10 consoles can be activated by the interviewers at one time. When the 11<sup>th</sup> interviewer attempts to log on to his/her Console, the interviewer will receive an error message stating that the allowed number of licensed CAPI Consoles has been exceeded.

**Note:** If more than one interviewer login is to be activated in a console (the interviewer station), then the interviewers should ensure they synchronize the console before they log off after use to ensure any data they have collected is transferred to the server.

Companies with CAPI/Kiosk access are allocated one additional user with the role **CAPI Activation User**. This user has **system\_company\_administrate** permission, which gives access to all projects that are set up within the company. The **CAPI Activation User** must have administrator access because this UserID is included in the activation files that are uploaded onto Interviewer Stations, and it is used as authentication during the synchronization process.

**Note:** The user who performs the installation and activation must have Administrator rights on the interview station/laptop.

A list of the end users (the interviewers who will be using the consoles) must be registered in Confirmit before the activation files (see Requirements Prior to Commencing Installation/Setup on page 4 for more information) can be sent. So that multiple users can conduct surveys using the consoles, this list can comprise User IDs and need not be "actual" personal names. Contact Confirmit Support for further details.

**Note:** Internet Explorer must be set as the default browser during CAPI Console installation. After the installation is completed, you can change the default browser to a different system if required.

### 2.1. Requirements Prior to Commencing Installation/Setup

Before your company's CAPI Activation User can start installing and setting up the CAPI consoles, your company must complete the following:

- A CAPI End User list must be created using the Confirmit End User Administration interface (see Interviewer Lists on page 5 for more information). Confirmit assigns each End User list a unique List ID number, and the list ID number for your company's list must be sent to Confirmit Company's License Administrator so it can be registered to your company.
- The details of the CAPI Interviewers – the people who will be conducting the offline interviews – must be set up in the CAPI End User list using the Confirmit End User Administration interface. These details can be added to the list or edited at any time; the list can be changed after it is registered. Refer to the Authoring User Guide for further details.
- Your company must register a specified number of CAPI Console licenses.

Confirmit's License Administrator must then complete the following:

- The CAPI End User list ID that your company has provided to Confirmit Company must be registered to your company.
- The number of CAPI consoles that your company has licensed must be registered in Confirmit.
- In most cases a "CAPI Activation User" is designated for your company. This user is able to create the CAPI Activation Files (see The Activation Files for Windows on page 6 for more information) that are required to activate each CAPI console.

Once these tasks have been performed you will receive notification from Confirmit's license Administrator. You may then commence installation.

**On-Demand only:** Contact Confirmit Professional Services at [support@confirmit.com](mailto:support@confirmit.com) when you need the End User List information to be added to your company settings.

**On-Premise:** contact your Confirmit Software Administrator for assistance.

## 2.2. ClickOnce and Proxy Authentication

ClickOnce is the mechanism that is used for the CAPI/Kiosk console installation. ClickOnce provides support for Windows Integrated proxy authentication. ClickOnce does not provide support for other authentication protocols such as Basic or Digest. Users who run the installation behind a proxy server where that proxy server uses Basic authentication will be presented with an error message stating that the URL cannot be reached as proxy authentication is required. Console installation and console running will therefore not work through a Basic authentication proxy server.

For Basic authentication, the only solution is that the user allows for proxy by-passing, otherwise every time the URL is accessed the user will need to authenticate. Methods such as attempting to load another browser and authenticating there first, then loading the console, will not work.

For further information regarding ClickOnce deployment, go to the msdn website at <http://msdn.microsoft.com/en-us/library/ms228998.aspx>.

## 2.3. Interviewer Lists

A CAPI End User list must be created using the Confirmit End User Administration interface. To view any existing lists:

1. Go to the **End Users > Lists** menu command.

The End User Lists page opens. This page contains all the End User lists currently available to you (if any).

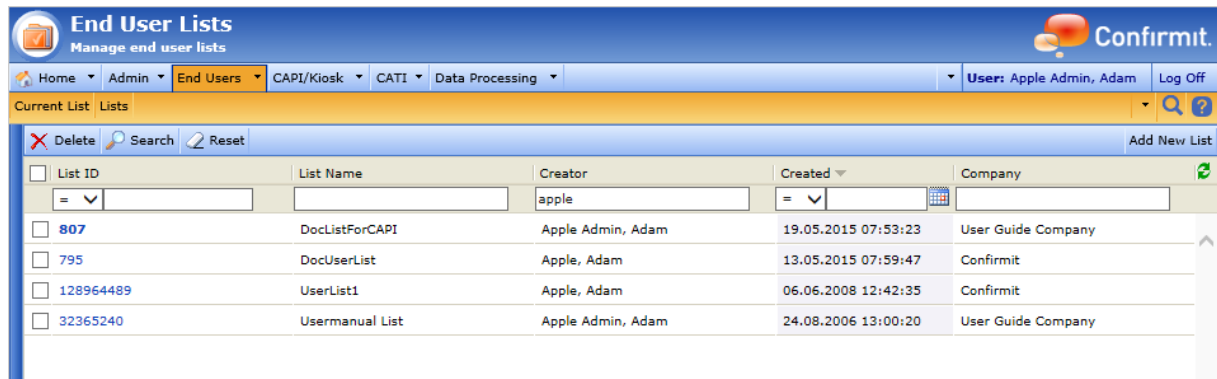


Figure 1 Example of an End User List for CAPI

2. Click on a blue **List ID** link to open the list.

In the list's Users tab, all the registered interviewers are specified with UserID and email address.

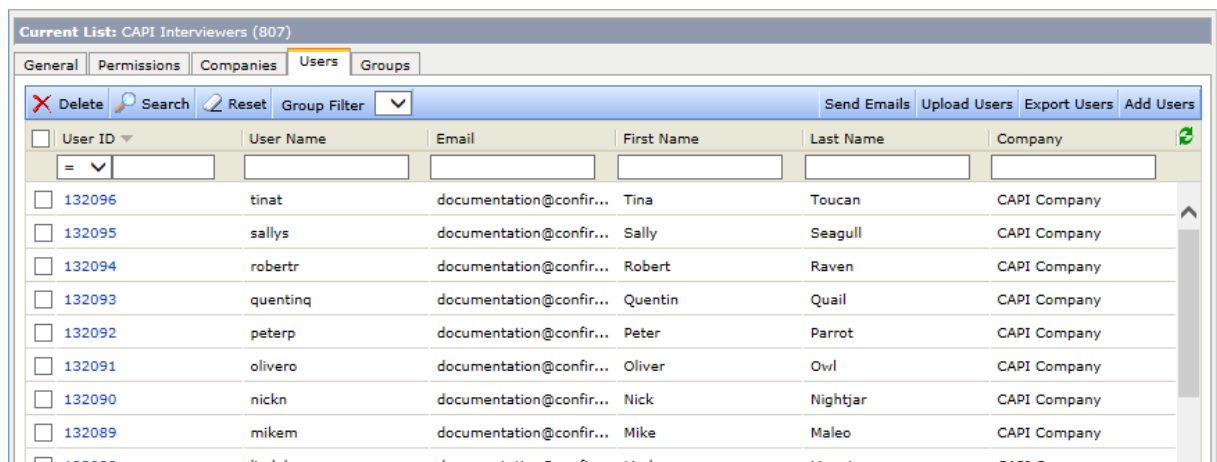


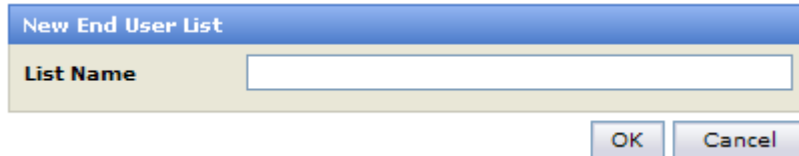
Figure 2 Example of users in an End User list

**Note: You can create “non-personal” users in the user list, for example Interviewer\_1, Interviewer\_2 etc. so that any interviewer can log in as long as they use the correct password.**

To create a new list:

1. From the End User Lists page click **Add New List**.

The New End User List dialog opens.



2. Give the new list a logical name and click **OK**.

The list is created, and opens on your display ready for you to add end users. The list will be included in the End User List page, and can be opened later for editing from there.

For more information about End User Administration, refer to the Confirmit Authoring User Manual.

## 2.4. Generating the Activation Files or Code

The basic procedures for generating the activation files for CAPI for Windows consoles or the activation code for the app used on Android devices are very similar, with minor differences.

**Note: You (as the CAPI Activation User) must create the End User list and register the list ID with Confirmit before you can create the activation files. The list can be edited after registration (see Requirements Prior to Commencing Installation/Setup on page 4 for more information).**

**Important**  
**The professional user account used to generate the CAPI activation files or code is automatically allocated company admin rights, and that account is then permanently linked to the activated consoles or Android devices. The Admin role cannot be revoked, nor can the account be deleted, otherwise the CAPI consoles will not be able to sync. If the server-side account is deleted for any reason, new activation files will have to be issued.**

### 2.4.1. The Activation Files for Windows

To create the Activation Files:

1. On your PC, log on to Confirmit as the CAPI Activation User using the user ID and password sent by Confirmit.
2. Go to the **CAPI/Kiosk > Admin > Console Activation** menu command.

The CAPI/Kiosk Activation overlay opens.

Figure 3 The CAPI/Kiosk Activation overlay

3. Define the duration of the CAPI activation files (the time frame within which the CAPI Console(s) must be activated).

**Note: The Start and End dates only control the validity of the activation files. After a console has been activated it will not expire. After the specified End Date it will not be possible to activate a console using these activation files. New files must then be generated by the CAPI Activation User.**

4. The Enforce Encryption option only applies to Android apps - ignore this here.
5. Specify the email address to which the files are to be sent.

One set of valid activation files can be used to activate any number of consoles – you do not need to generate separate activation files for each CAPI/Kiosk Console/Interviewer. Generate the files once and distribute them to all the administrators who will be performing the installations. Note that you can only send the files by email to one address at a time from Confirmit. However, the files can be attached to emails produced by other applications (such as Outlook) and distributed as required.

6. Click **Send Activation Details**.

An email containing the Activation Files is sent to the address specified in the Send To field, and a message is displayed informing you that the files have been sent.

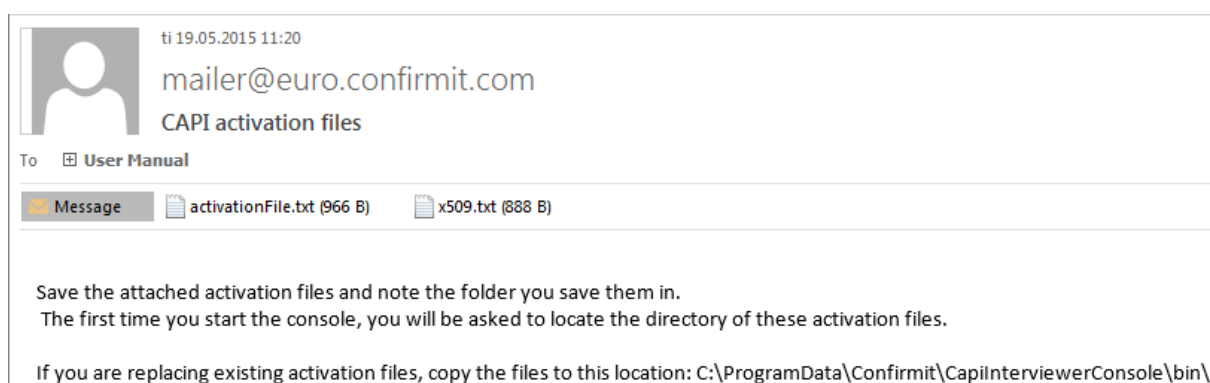


Figure 4 Example of the activation email

The recipient will receive two text files; **activationFile.txt** and **x509.txt**. These must be saved in all the PCs that are to be used as interviewer stations. During CAPI installation, the files will be copied into the folder **C:\Program Files\Confirmit\CapiInterviewConsole\bin** after the CAPI Console has been downloaded to that interviewer station (see Downloading the CAPI Console Installation Files on page 9 for more information).

In the event the User ID list is not registered, the error message shown below is displayed.

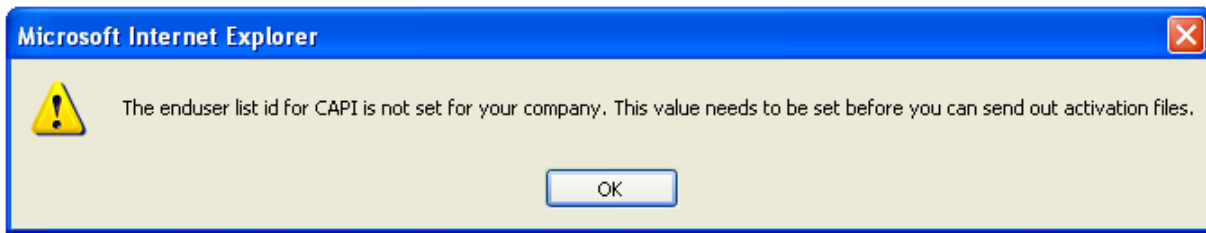


Figure 5 The End User List ID warning message

### 2.4.2. The App Activation Code

If your interviewers are using Android devices then they will need to download the CAPI app to their device (refer to the CAPI App User Guide for further details) and activate it using a code generated here.

To create the code:

1. On your PC, log on to Confirmit as the CAPI Activation User using the user ID and password sent by Confirmit.
2. Go to the **CAPI/Kiosk > Admin > Console Activation** menu command.

The CAPI/Kiosk Activation overlay opens.

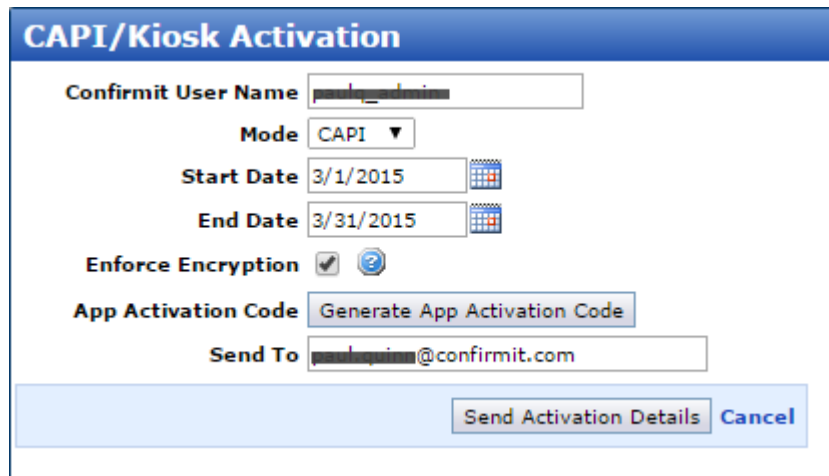


Figure 6 The CAPI/Kiosk Activation overlay

3. Define the duration of the App activation code (the time frame during which the Android devices must be activated).

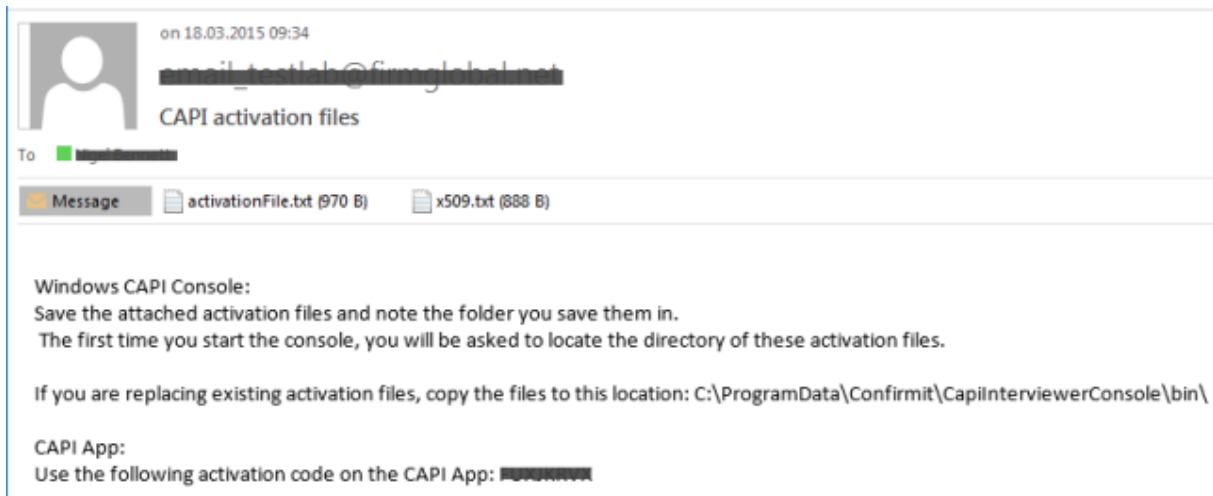
**Note: The Start and End dates only control the validity of the code; after a device has been activated it will not expire. After the specified End Date it will not be possible to activate a device using the code. A new code must then be generated by the CAPI Activation User.**

4. Decide whether you wish to enforce encryption, and check/uncheck the box as required.  
When Enforce Encryption is selected, the CAPI app can only be installed on devices that have device encryption enabled. If encryption is not enabled it will not allow the app to be installed. The app will not encrypt the device automatically. This option does not apply to CAPI on Windows.
5. Click the **Generate...** button to create the code; the code is then presented in place of the button.
6. Specify the email address to which the code is to be sent.

One valid activation code can be used to activate any number of Android devices – you do not need to generate separate activation codes for each device. Generate the code once and distribute it to all the administrators who will be performing the installations. Note that you can only send the code by email to one address at a time from Confirmit. However, the code can be copied into emails produced by other applications (such as Outlook) and distributed en-mass as required.

7. You can now click the **Send Activation Details** button.

The code is sent to the address specified in the Send To field, and a message is displayed informing you that the email has been sent.



*Figure 7 Example of the activation email*

The recipient can then type or copy the code into their device activation screen and activate their Android device.

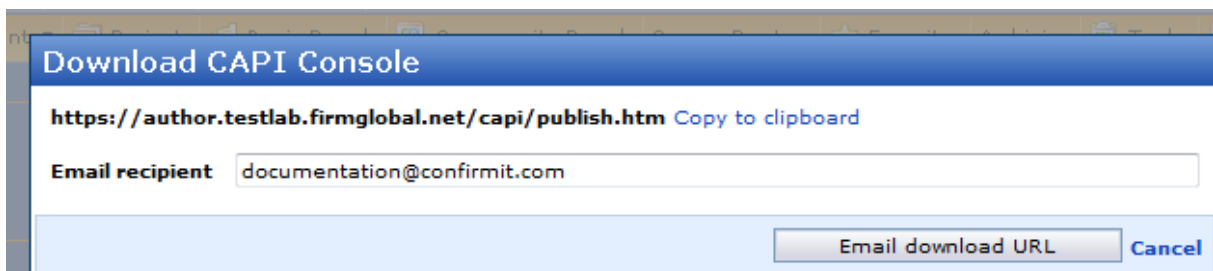
## 2.5. Downloading the CAPI Console Installation Files

**Note: The procedures given here are for CAPI using Windows on a laptop. For information about the CAPI app, refer to the separate CAPI App User Guide.**

The URL from which you download the CAPI installation files will differ depending on which server you run Confirmit Authoring from. Therefore, for each individual interviewer station/laptop PC onto which the CAPI Console is to be installed, you are recommended to log on to Confirmit Authoring and fetch the relevant URL as stated below.

1. In Confirmit Authoring, go to the **CAPI/Kiosk > Download CAPI Console** menu command.

The Download CAPI Console overlay opens. Here you can either send the URL to a specified email address or copy it directly into your clipboard.



*Figure 8 The Download CAPI Console overlay*

The default email address, to which the download URL will be sent, is that specified for the currently-logged-on user - you.

2. Edit the email address if necessary and click **OK**, or copy the URL into your clipboard and paste it into your Internet Explorer.
   
If using email, an email with the URL is sent to the specified address.
3. Click the URL to open IE at the download page.

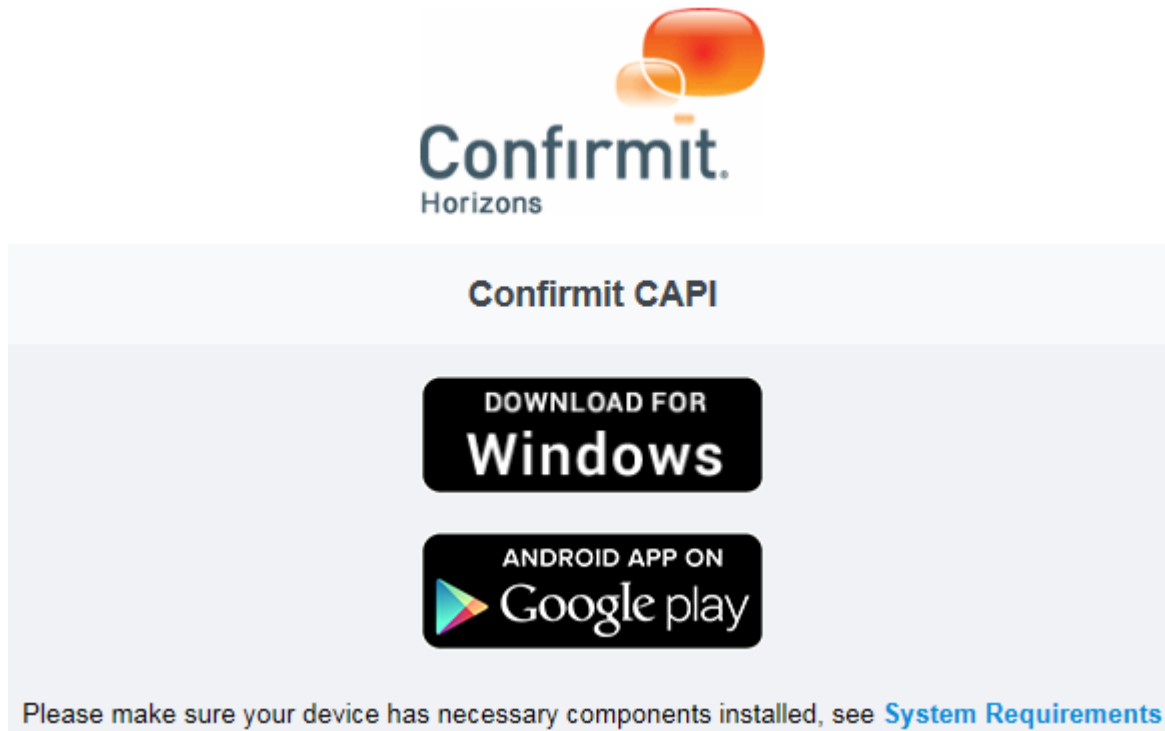


Figure 9 Example of the download page

4. Click the **Download for Windows** button and follow the instructions to download the file.  
For all supported browsers, the CAPI/Kiosk console will install to the `c:\programdata\` folder.

**When you install the application, the system will also run a check to verify that the required applications (see System Requirements on page 2 for more information) are installed on the interviewer station/laptop. If any of the applications are missing, they will be installed automatically before the CAPI Console installation starts.**

5. Continue as appropriate:

### 2.5.1. How to Upgrade a Console

Your console will be upgraded automatically the first time you log on after the application has been upgraded on the server. The files are copied into your PC and the console is enabled for normal CAPI operations.

### 2.5.2. How to Install a New Console

1. Log on to the console PC as the PC Administrator and run the installation file (see Downloading the CAPI Console Installation Files on page 9 for more information).
2. Read and accept the Confirmit License.
3. In the page that now opens, click **Install**.  
A dialog box appears.
4. Click **Run** and confirm the installation as necessary.

The Install command runs an installation of both the new third party software components required from Microsoft and the CAPI Console. The Launch command installs only the CAPI Console, so in this case the prerequisites must already be installed.

The console will start automatically after the installation.

**Note: Confirmit recommends that you always install automatic updates when prompted to do so by the CAPI application. Confirmit Company reserves the right to force the installation of critical updates.**

The Browse For Folder dialog opens and you are asked to indicate where the activation files are located (see Interviewer Lists on page 5 for more information)

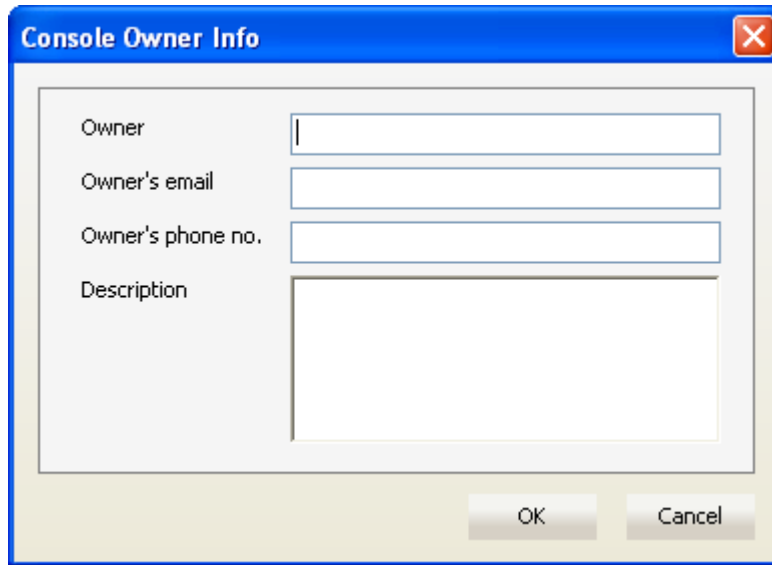
5. Browse to the folder in which the Activation files were stored, select the folder and click **OK**.

The Activation files are copied into the **C:\...\Confirmit\CapiInterviewConsole\bin** folder. The CAPI/Kiosk license agreement opens.

**Note: In the event the selected folder does not contain the expected activation files, you will be asked to select a different folder. If the activation file is empty, an error message will be displayed and the activation process will be aborted.**

6. Read and accept the license agreement.

The Console Owner Info dialog opens. This dialog enables you to input the owner information while you are setting up the console, thereby reducing the amount of work required later. Note that this information is not obligatory.



*Figure 10 The Console Owner Info dialog*

7. Fill in the Owner information as desired and click **OK**.

The CAPI Console is launched and the CAPI Login screen opens.

**Note: If the activation files are missing, the same window will appear again.**

8. Close the console application and log off the PC.
9. Log on to the PC as the user who is to use the PC for conducting the interviews.
10. Go to the **Start menu > Programs > Confirmit > Confirmit Console** and run the Console application.
11. Log in as the interviewer who is to use the console.

This enables the console for normal CAPI operations.

**Important**  
 To install the new third party software components required, the user initiating the install function must have administrator rights in Windows. If this installation is performed using the Install command as described above, be aware that the CAPI Console that is automatically installed during that operation will be locked to that administrator user. The CAPI Console end user, who will normally use another Windows user account for logging into the PC, will therefore not be able to access this CAPI Console. In this scenario, the CAPI Console end user must run step 7 in the procedure above. The user installing the CAPI Console must also ensure that the end user has access rights to the "confirmit" folder. This can be located in C:\Program Files\confirmit, or in C:\programdata\confirmit for windows Vista and 7.

**Note: Site Administrators can download an ISO image containing the CAPI client setup for off-line distribution and setup. Read the Readme file located on the root path on the CD image for setup instructions.**

**Note:** The clock on the CAPI console computer must be correctly set in order for CAPI to synchronize successfully.

### 2.5.3. Automatic Updates

**Important**

If you intend to conduct any online activity during your console work session (for example if you intend to synchronize the console) then Confirmit strongly recommends that you have an Internet connection working BEFORE you start the console. The CAPI/Kiosk console application automatically looks for update notifications on start-up. If the CAPI application has been updated and an Internet connection is not available when the console is started, then the console will not automatically know that the update is available and problems may occur if you later attempt to synchronize the old console application with the newer CAPI application. If you are in any doubt, go to **Help > Check for Updates**.

When an update is available for the CAPI/Kiosk application, you will be notified and prompted to download and install it.

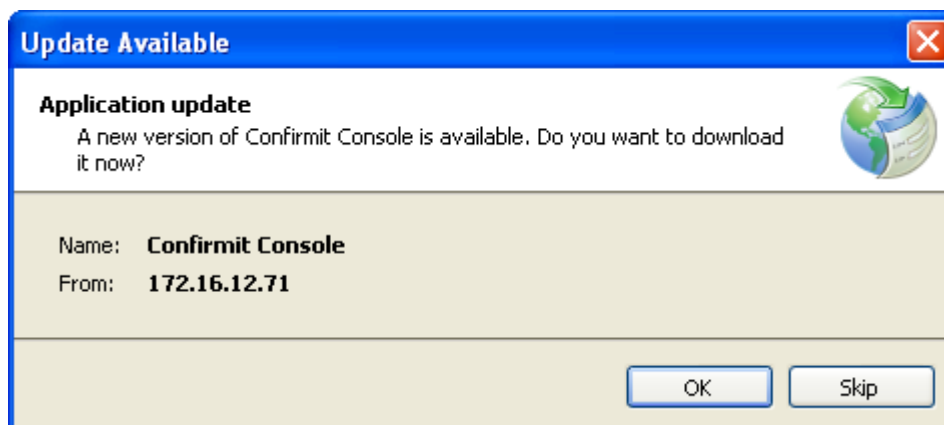


Figure 11 The update notification dialog

The normal procedure will be to approve the download, wait for the few moments it takes to download and install the update, then continue using your system. If you do not wish to download and install the update when prompted, cancel the prompt dialog.

Note however that if you refuse the update when first notified, you will not be prompted again. To update your system later, you must visit the Console download web site and click on the **Setup.exe** link (see Downloading the CAPI Console Installation Files on page 9 for more information), or run the check "manually" - see below.

In the event you must launch the CAPI console before an Internet connection is available, you can later tell the console to check for updates. To do this:

Go to the **Help > Check for Updates** menu item.

The console will force a connection to the Confirmit environment and verify that the console is running the latest version of the CAPI console. If it is the latest version, a message will be displayed stating that the version is the latest and stating the actual version. If there is a new version available then this will be installed.

**Note:** Confirmit recommends that you always install automatic updates when prompted to do so by the CAPI application. Confirmit reserves the right to force the installation of critical updates.

### 2.5.4. Deleting CAPI Console from a PC

In the event you need to completely remove the CAPI Console application from a PC, perhaps prior to performing a fresh installation, proceed as follows:

1. Go to the PC's **Start menu > Settings > Control Panel** and open the **Add or Remove Programs** application.
2. Using this, un-install the **Confirmit Console** application.
3. Go to the appropriate folder as specified below, and delete the **Confirmit** folder.

For Windows 7 and Vista - **C:\programdata\**

For Windows XP - **C:\Documents and Settings\All Users\Application Data\**

The Confirmit Console is now removed from the PC, and you are in a position to perform a new installation if necessary.

### 3. Setting Up

#### 3.1. How to Set Up a Survey for CAPI/Kiosk

When you have created and programmed your survey in Confirmit Professional Designer (refer to the Confirmit Authoring User Manual for more information), and you want the survey to be either only a CAPI survey or both a CAPI and a CAWI survey, proceed as follows:

1. Before you launch the survey, go to the **Designer > Survey Settings** menu command, **Survey Channels** tab, and select the **CAPI/Kiosk survey** checkbox.

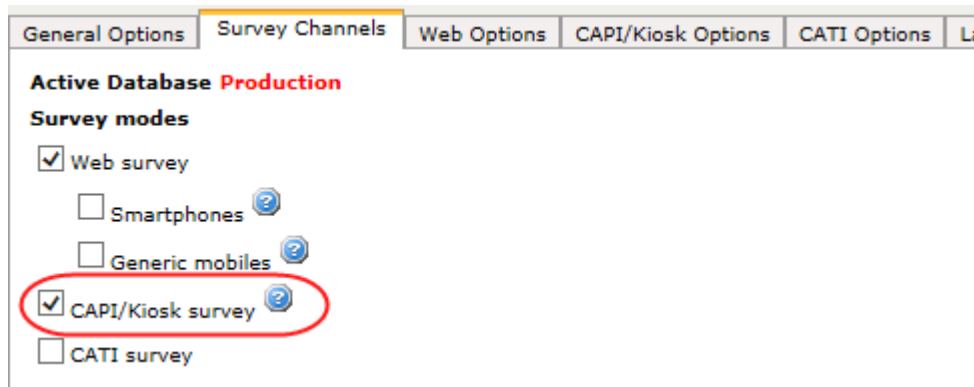


Figure 12 Selecting the CAPI/Kiosk Survey setting in the Survey Channels page

2. Go to the **CAPI/Kiosk Options** tab .

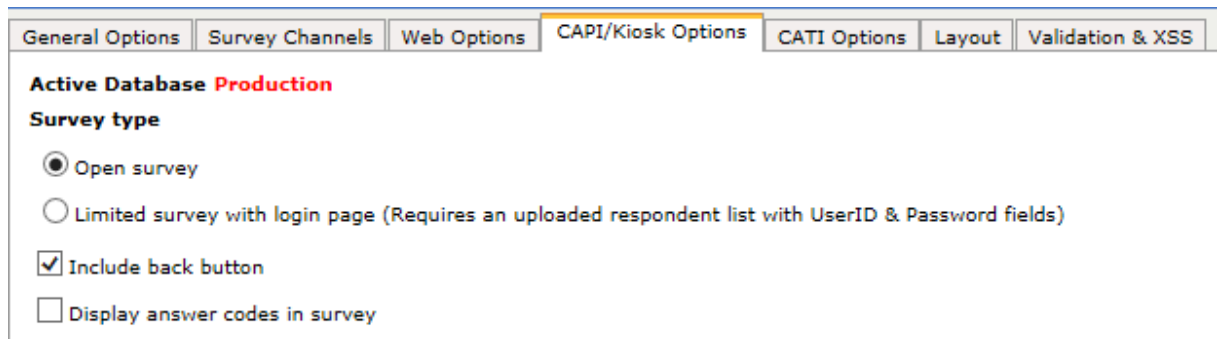


Figure 13 Setting the CAPI/Kiosk Options

This tab contains a number of options. As with web surveys, you can define a CAPI survey to be either Open or Limited.

- o When a CAPI survey is defined as Open, the interviewers generate the interviews/responses themselves on the console. If the console is set up as a Kiosk, anyone who wishes to respond to a survey can do so.
- o When a CAPI survey is defined as limited, the interviewers will either have specific respondents assigned to them or, if the console is set up as a Kiosk, respondents must log in to the survey using the userids/passwords that have been uploaded into the survey.

Also, you can specify that the answer codes are displayed beside the category text for single and multi questions. For example, a Gender question with the answers Male (code 1), Female (code 2) and Refused (code Ref), would be presented as:

- 1: Male
- 2: Female

Ref: Refused

The layout will always take the format “code label: category text”.

For information on other Survey Settings (Web options, Layout, Validation), see the Confirmit Authoring User Guide.

3. Go to the **Launch Survey** menu command and click **Launch Survey** to launch the survey.

Confirmit generates compressed CAPI files in addition to web files. The CAPI files contain all settings, scripts, multimedia files, etc. with which the project has been programmed. These files are then transferred to the interviewer console during synchronization.

Confirmit creates a **CAPI Specific** folder in the Questionnaire Tree.

Once you have selected the required survey settings and launched the survey, you can move on to the CAPI/Kiosk Supervisor module (the options in the CAPI/Kiosk menu) (see The CAPI/Kiosk Menu on page 18 for more information).

**Note: Confirmit users who are to be CAPI Supervisors for a project must be given “Supervise CAPI Project” permission for the specific project in the Survey Management > Permissions page.**

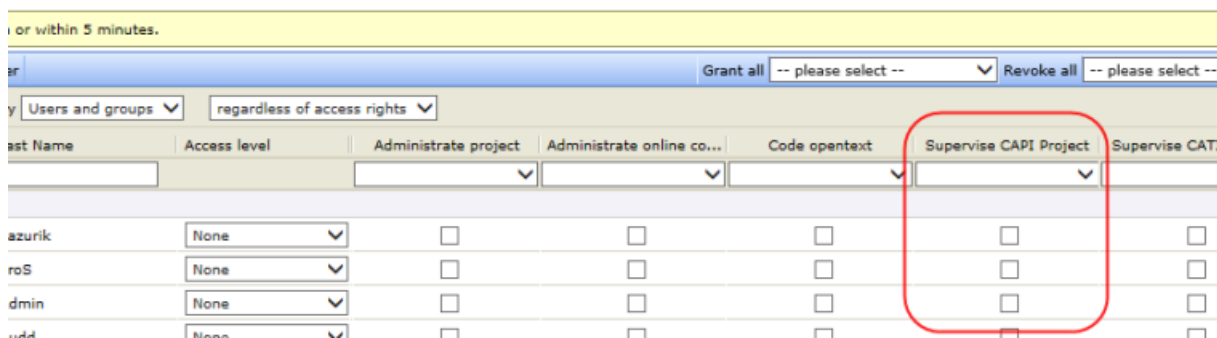


Figure 14 Setting the Supervise CAPI Project permissions

### 3.2. The Survey Channel Function

When a survey is to be conducted as both CAWI and CAPI, you may wish to display specific questions in one mode that are not required in the other. To achieve this, use the **GetSurveyChannel()** function.

If for example a survey has one group of questions that are to be shown only in the CAPI survey and another group of questions that are to be shown only in the CAWI survey, include two Conditional expressions in the survey to define this logic, as shown below.

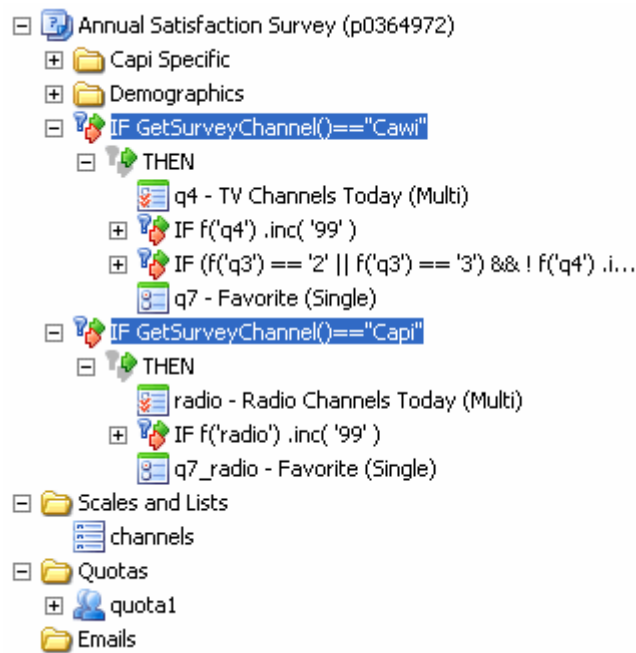


Figure 15 Using the GetSurveyChannel Function

In the example above, respondents answering the web survey will only see the questions concerning TV Channels, while the CAPI Interviewer will only be able to see and ask the questions concerning radio.

You can also set the channel mode into a hidden question using a script if for example you want to report on the channel mode.

Insert a script node into the survey and write the following script:

```
f("mode").set(GetSurveyChannel())
```

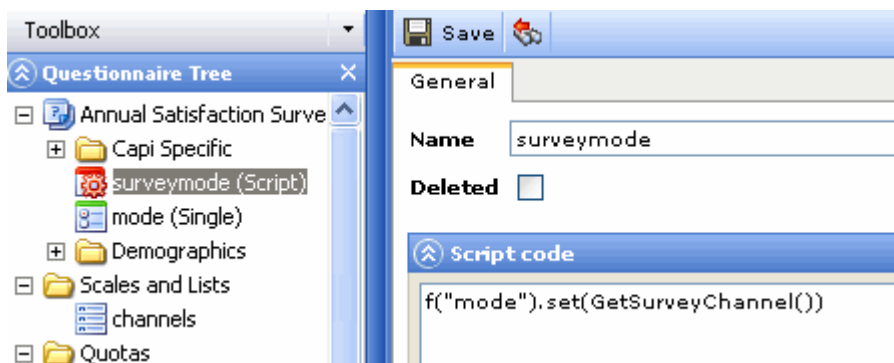


Figure 16 Adding GetSurveyChannel in script

The script must refer to the question where the survey mode is to be set. The question must be a Single question (here with ID "mode") with two Answers. Make the codes for these answers **Capi** and **Cawi**.

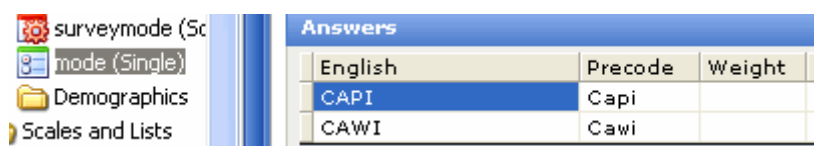


Figure 17 The Single question survey channel

### 3.3. Files in CAPI Surveys

**Note: See the Confirmit Authoring User Manual for more information about the File Library functionality in Confirmit.**

If you must refer to images or other files in a CAPI survey, then to ensure that the files are included in the survey during the synchronization process they must be stored in specifically named folders in the Confirmit File Library. The folder name must be either the project number if they are used only in this project, or “CAPICommon” if they are shared across several CAPI surveys.

**Note: The following characters are not allowed and must not be used in folder names in the File Library: + % / \ ? # \$ & \* | : " < > .**

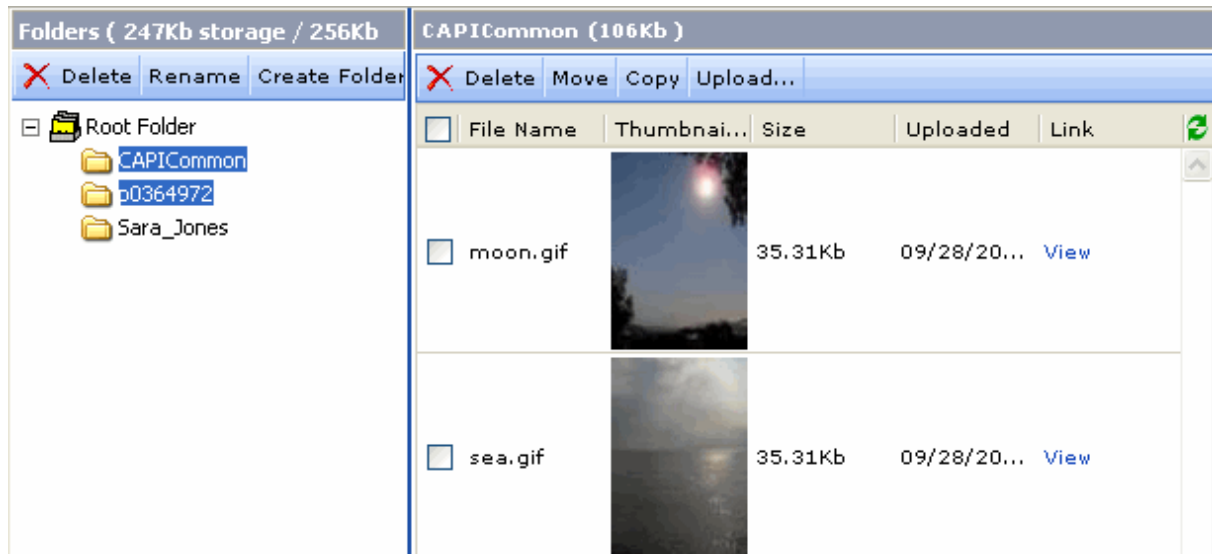


Figure 18 Files used in CAPI survey

## 4. The CAPI/Kiosk Menu

The CAPI Supervisor Module is fully integrated with Confirmit and includes the following functionality:

- **Interviewer Management** – enabling complete control of the interviewer workforce (see Interviewer Management on page 19 for more information).
- **Sample Management** – enabling proper sampling on “offline” populations (see Sample Management on page 22 for more information).
- **Synchronization Status** – ensuring the supervisor is informed of project progress (see Synchronization Status on page 30 for more information).
- **Messaging system** – to communicate with the interviewer workforce (see The Messaging System on page 33 for more information).
- **Productivity Stats** – you can create reports of the interviewer productivity statistics (see Productivity Stats on page 36 for more information).
- **Upload Interviewer Assignments** – in the event you have a large field force, where a large number of assignments need to be made on a regular basis, this function enables you to upload the assignments from a tab-delimited text file (see Uploading Interviewer Assignments on page 39 for more information).
- **Download CAPI Console** - enables you to send a URL to the CAPI download site to a specified email address (see Downloading the CAPI Console on page 40 for more information).
- **Admin** – provides access to the Administrator functions.

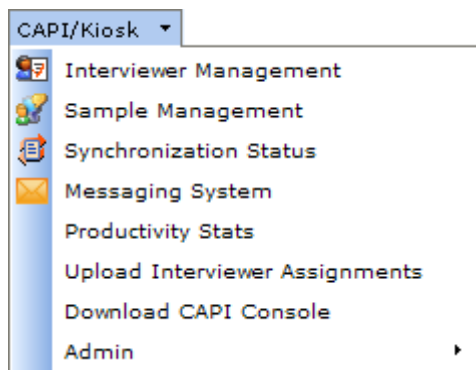


Figure 19 The CAPI/Kiosk menu

The Admin sub-menu is for CAPI administrators only and has the following functions:

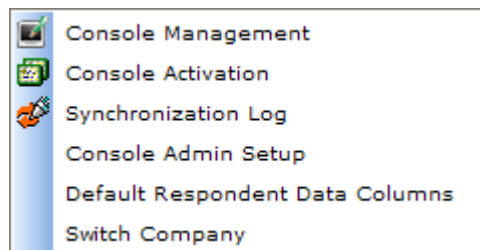


Figure 20 The Admin sub-menu

- **Console Management** – to set up and manage the console (see Console Management on page 40 for more information).Admin
- **Console Activation** – to activate the console (see The Activation Files for Windows on page 6 for more information).
- **Synchronization Log** – a list of console synchronization operations (see Synchronization Log on page 43 for more information).

- **Console Admin Setup** – the administration setup functionality (see Console Admin Setup on page 45 for more information).
- **Default Respondent Data Columns** - allows supervisors to specify the default columns of respondent information that are to be displayed in the CAPI console (see Default Respondent Data Columns on page 47 for more information).

**Note: Re-synchronization of productivity data, which was previously possible through this sub-menu, is now achieved via the Confirmit Authoring Admin menu. Refer to the Administrator manual for further details.**

These functions are explained in the following sections.

## 4.1. Interviewer Management

When your survey has been launched as a CAPI survey (see How to Set Up a Survey for CAPI/Kiosk on page 14 for more information) and the interviewers are set up in a list in End Users, the CAPI Supervisor can start to administer the survey and interviewers.

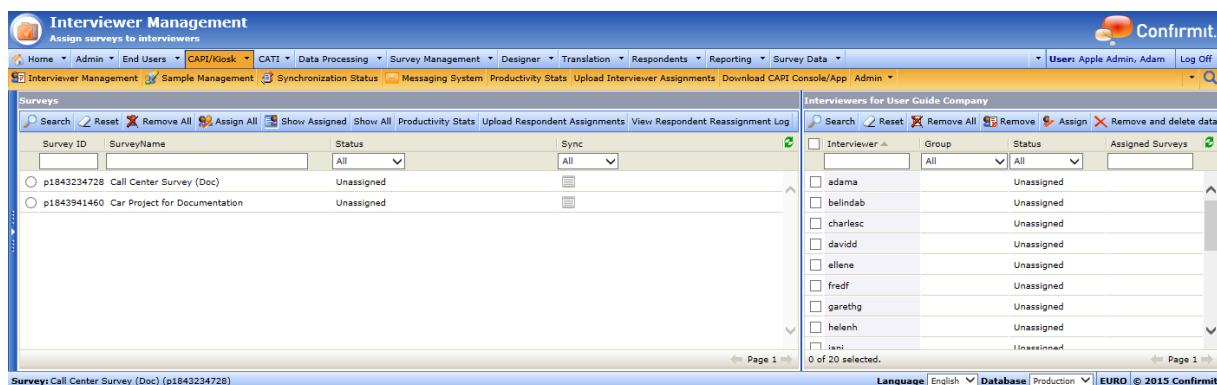
This section is for the CAPI Supervisor.

### 4.1.1. How to Add Interviewers To and Remove Them From a Survey

**Note: You must have CAPI Project Supervisor permission for the survey before you can add and remove interviewers (see How to Set Up a Survey for CAPI/Kiosk on page 14 for more information).**

1. Go to the **CAPI/Kiosk > Interviewer Management** menu command.

The page shown below opens.



**Figure 21 Example of the Interviewer Management screen**

The page shows two lists. The Surveys list on the left displays all the surveys that have been launched as CAPI surveys and to which the current supervisor has access. The Interviewers list on the right displays all the interviewers who have been set up in the End User List to which a reference is made at the company level in the Confirmit User Administration interface.

2. To assign interviewers to a project or remove them from it, select the project and the interviewers and click the appropriate button, then confirm the action.

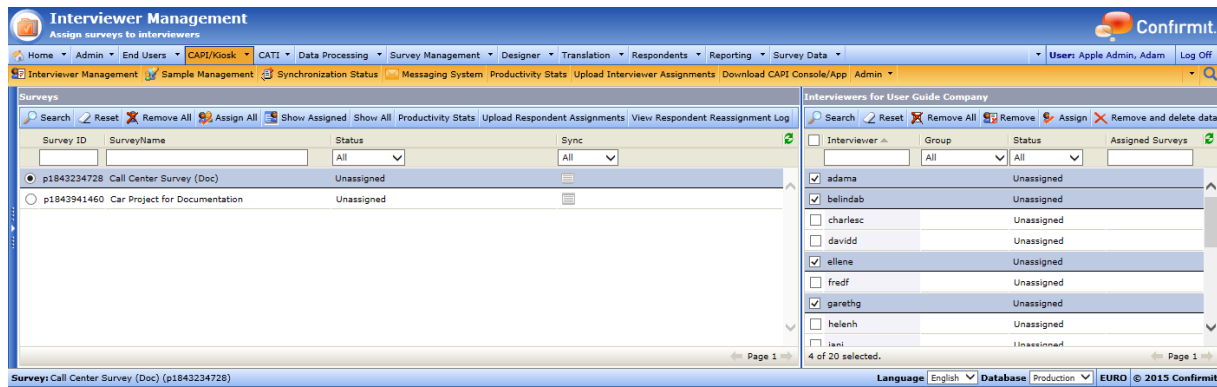


Figure 22 Selecting the project and interviewers

In all cases, the screen will update and display the number of interviewers that are assigned to each survey in the Survey Status column, and the number of surveys each interviewer is assigned to in the Interviewers Status column.

**Note: If an interviewer has collected and synchronized response data for a survey and is then re-assigned and replaced by a different interviewer, then the synchronized data for that survey will be transferred to the new interviewer. If the data has not yet been synchronized when the original interviewer is removed from the survey, then the system cannot know that this data exists. The response data collected by the original interviewer will then be stored in the interviewer console. To retrieve this data, you must re-assign the original interviewer to the survey and synchronize the console so that the data is transferred to the server. You can also delete the data when removing the interviewer (see Deleting Interview Data on page 21 for more information).**

The project IDs of the surveys to which an interviewer has been assigned are displayed in the Assigned Surveys column in the Interviewers frame.

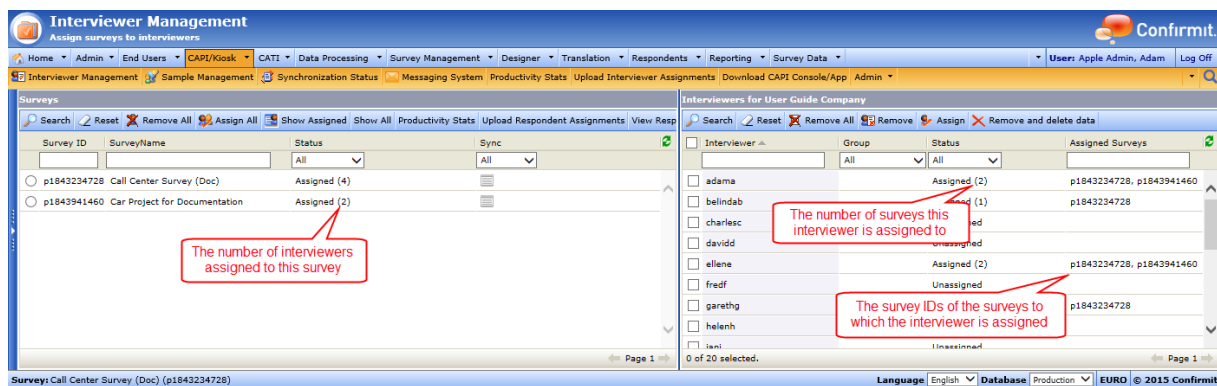


Figure 23 Assigning interviewers to a survey

The buttons in the Surveys frame are as follows:

- **Search** – in the event the list is extensive, you can add search criteria to the appropriate fields and click this button to reduce the list to a manageable size.
- **Remove All** – all interviewers that are assigned to the selected project will be removed.
- **Assign All** – all interviewers listed in the Interviewers frame will be assigned to the selected survey.
- **Show Assigned** – the Interviewer frame will be updated and only those interviewers who are actually assigned to a project will be displayed in the list.
- **Show All** – after you have clicked Show Assigned, click this button to re-display the entire list.
- **Productivity Stats** – click to open the Productivity Stats page (see Additional Functionality on page 36 for more information).

- **Upload Respondent Assignments** – you can upload respondent assignments to simplify the management of larger field forces, for example where a large number of respondent assignments may need to be made at regular intervals (see Sample Management on page 22 for more information).
- **View Respondent Reassignment Log** – the Respondent Reassignment log displays details of respondent records that have been re-assigned from one interviewer to another, where data exists on the original interviewer’s device. The supervisor can then make a decision on whether or not to re-assign them back to the original interviewer (see How to Re-assign Respondents to Different Interviewers on page 27 for more information).

The buttons in the Interviewers frame are as follows:

- **Search** – in the event the list is extensive, you can add search criteria to the appropriate fields and click this button to reduce the list to a manageable size.
- **Remove All** – select a project in the Surveys frame, select one or more interviewers in the Interviewers frame and click **Remove All** to remove **all** allocated projects/surveys from **the selected interviewers**. They will then no longer have access to any surveys. The status columns in both frames will be updated to reflect the changes.
- **Remove** – select a project in the Surveys frame, select one or more interviewers in the Interviewers frame and click **Remove** to remove the selected project/survey from the selected interviewers. They will then no longer have access to this survey.
- **Assign** – select a project in the Surveys frame, select one or more interviewers in the Interviewers frame and click **Assign** to assign the selected interviewers to that project.
- **Remove and delete data** – when removing an interviewer from a project, if you also wish to delete the data that interviewer has collected for that project, click this button (see Deleting Interview Data on page 21 for more information).

**Note: This action will only delete data from the console; it will NOT delete the data that has been collected in the survey database.**

### 4.1.2. Deleting Interview Data

When an interviewer is removed from a project, you can also delete from the console any data collected by that interviewer for that project. This action allows you to reduce the amount of respondent data that is stored on CAPI console.

1. In the Interviewer Management window, select the project and the interviewer you wish to remove from that project, and click **Remove and Delete Data**.

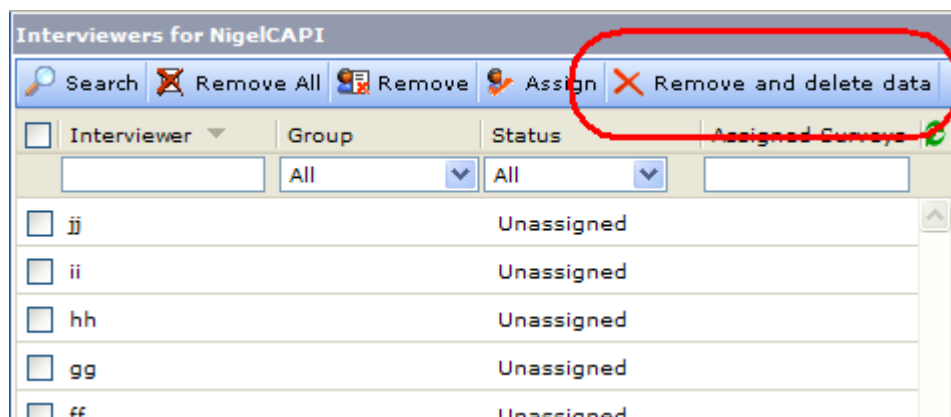


Figure 24 The Remove and delete data button

When the console is next synchronized and the assignment is removed, the data will also be deleted.

**Note: As this operation will result in data being deleted from the CAPI Console (not the database), you are prompted to select both the project and the interviewer(s) at the same time.**

### 4.1.3. The Project Right-Click Menu

Select a project and right-click on it to open a drop-down menu.

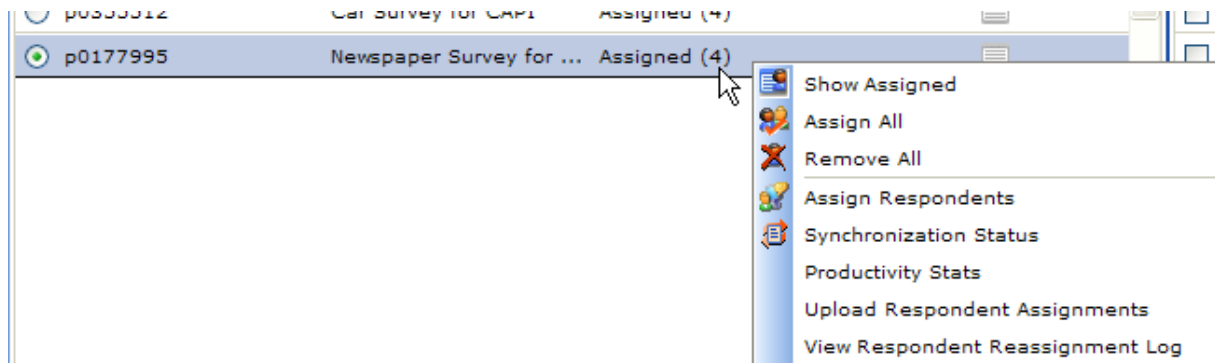


Figure 25 The Project right-click menu

Here you have menu access to three functions from the Interviewer Management frame, **Show Assigned**, **Assign All** and **Remove All**, and in addition you also have direct access to functions from the Sample Management window (see Sample Management on page 22 for more information) and Synchronization Status functionality (see Synchronization Status on page 30 for more information) for the current project.

## 4.2. Sample Management

If you have a survey for which a known sample (set of respondents) has been uploaded, and these respondents are to be interviewed offline by a specified number of CAPI interviewers, you can divide the sample among the interviewers such that each respondent is assigned to a specific interviewer.

In the following example, the respondents will be assigned to interviewers based on a variable that has been uploaded along with the respondent file. The variable used in this case is "region", or the respondents' place of residence.

1. Go to the **CAPI/Kiosk > Sample Management** menu command.

The page shown below opens.

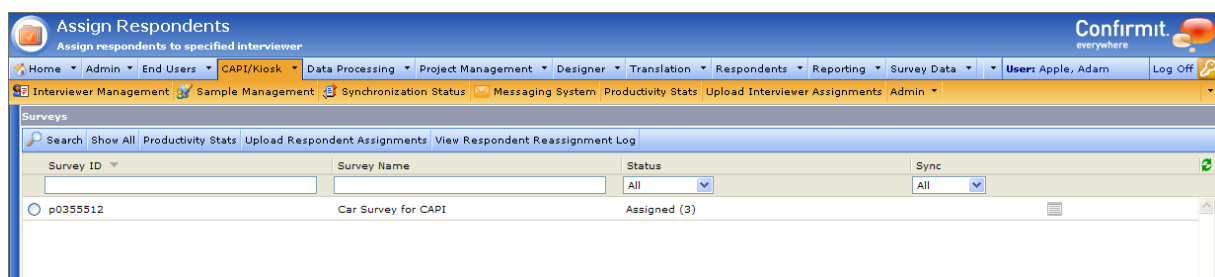


Figure 26 Example of the Sample Management page

The page lists all the surveys that have been launched as CAPI surveys and to which the CAPI Supervisor has access. The list behaves in the same way as all lists in Confirmit: it is searchable, and you can sort it in descending or ascending order by clicking on the column titles (Survey ID, Survey Name).

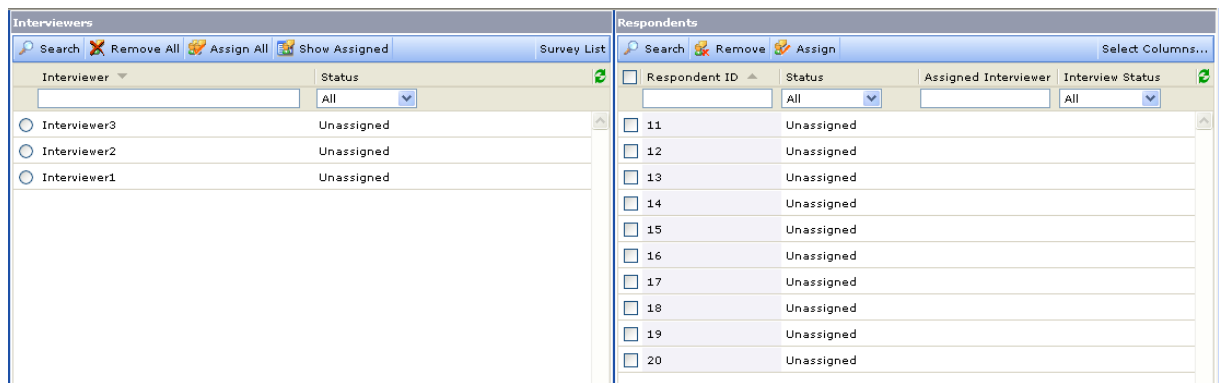
2. Select a survey and right-click on it to open a drop-down menu with the following commands:
  - o **Assign Respondents** – opens the interface in which you assign to interviewers the respondents who are uploaded into the project.
  - o **Set Columns for Project** – opens the Set Default CAPI Columns interface. This allows the project supervisor to specify the respondent information columns that are to be displayed in the CAPI console. This overrides for the project, the company default setting specified by the administrator (see Default Respondent Data Columns on page 47 for more information).

- o **Interviewer Management** –opens the CAPI/Kiosk > Interviewer Management window (see Interviewer Management on page 19 for more information).
- o **Synchronization Status** – shows the status for the current project.
- o **Productivity Stats** – click to open the Productivity Stats page (see Productivity Stats on page 36 for more information).
- o **Upload Respondent Assignments** – you can upload respondent assignments. This simplifies the management of larger field forces, where a large number of respondent assignments may need to be made at regular intervals (see How to Upload Respondent Assignments on page 26 for more information).
- o **View Respondent Reassignment Log** – the Respondent Reassignment log displays details of respondent records that have been re-assigned from one interviewer to another, where data exists on the original interviewer’s device. The supervisor can then make a decision on whether or not to re-assign them back to the original interviewer (see The Respondent Reassignment Log on page 28 for more information).

3. Select **Assign Respondents**.

The Assign Respondents window opens. This window comprises two areas; the area to the left lists the interviewers who have been assigned to the current survey, and the area to the right lists the respondents who have been uploaded into the current survey.

**Note: If the project is also run as an open project where interviewers can choose the respondents, these respondents will also be listed here.**



**Figure 27 Example of the Assign Respondents window**

A field selection pop-up window is available in the Respondents frame that enables you to select the fields from the respondent list, or system fields, that you want to be displayed in this frame.

- 4. Click the **Select Columns** button (furthest right in the button bar) to open this window.

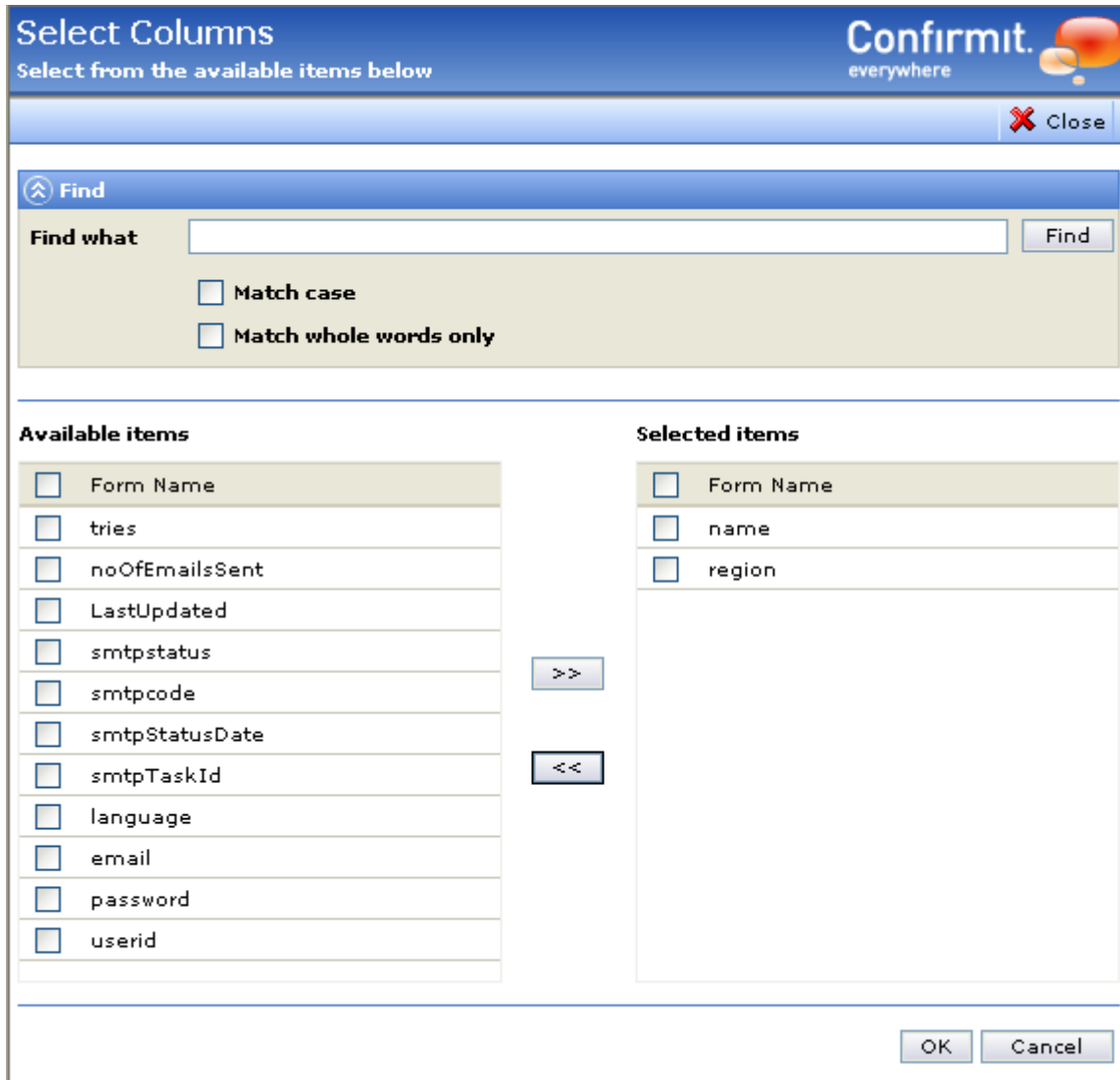


Figure 28 The Select Columns window in Respondents

Assume for this example that we need to see the respondents' names and the regions of residence so that we can assign them to interviewers based on that information.

5. In the **Available Items** column, check the boxes beside the **region** and **name** options, and click the **>>** button to move them to the **Selected Items** column. The **region** and **name** columns are then added to the list .

Respondent ID	Status	Assigned Inter...	Interview Status	name	region
11	Unassigned			Alan Brown	London E
12	Unassigned			Christine Downer	London S
13	Unassigned			Eric Folker	London N
14	Unassigned			Gareth Holland	London N
15	Unassigned			Ian Jones	London W
16	Unassigned			Karen Lennon	London S
17	Unassigned			Mandy Nolan	London S
18	Unassigned			Oliver Paulson	London W
19	Unassigned			Quentin Roland	London E
20	Unassigned			Sally Tate	London W

Figure 29 The Respondents list with the required columns displayed

6. Assign the respondents to the interviewers using the appropriate function:
  - o Select an interviewer and some respondents and click **Assign** to assign the respondents to the interviewer.
  - o Select an interviewer and click **Assign All** to assign all the respondents to the interviewer.
  - o Select an interviewer and click **Remove All** to remove all respondents from that interviewer.
  - o Select an interviewer and click **Show Assigned** to update the Respondent frame and show the respondents who are assigned to the current interviewer.
  - o Click **Survey List** to go to the first screen in Sample Management, where all surveys are listed, so that you can choose another survey and assign respondents to interviewers in that survey.
  - o Select some respondents who are already assigned to interviewers and click **Remove** to remove the respondents from the interviewer.

**Note: Right-click on an interviewer to open a drop-down menu from which you can execute three of the actions that are described above: Assign All, Remove All, and Show Assigned.**

Interviewer	Status
Interviewer1	Assigned (4)
Interviewer2	Assigned (3)
Interviewer3	Unassigned

Respondent ID	Status	Assigned Inter...	Interview Status	name	region
11	Assigned	Interviewer1		Alan Brown	London E
12	Assigned	Interviewer2		Christine Downer	London S
13	Assigned	Interviewer1		Eric Folker	London N
14	Assigned	Interviewer1		Gareth Holland	London N
15	Unassigned			Ian Jones	London W
16	Assigned	Interviewer2		Karen Lennon	London S
17	Assigned	Interviewer2		Mandy Nolan	London S
18	Unassigned			Oliver Paulson	London W
19	Assigned	Interviewer1		Quentin Roland	London E
20	Unassigned			Sally Tate	London W

Figure 30 Assigning respondents to interviewers

The CAPI supervisor in the example above is about to assign the respondents residing in London West to the interviewer “Interviewer3”. In the example, “Interviewer1” will visit respondents in London East and North, “Interviewer2” will visit respondents in London South and “Interviewer3” will visit respondents in London West.

Select a respondent and right-click on it to open a drop-down menu offering the same options as the buttons.

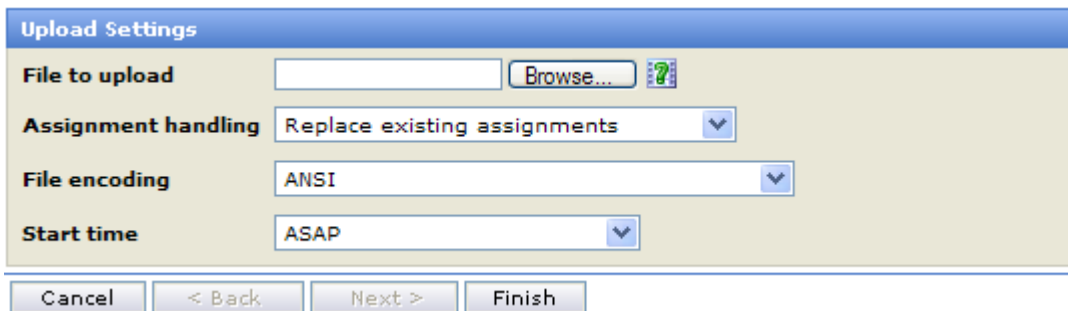
### 4.2.1. How to Upload Respondent Assignments

The ability to upload respondent assignments simplifies the management of larger field forces, where a large number of respondent assignments may need to be made at regular intervals. In addition, it simplifies the ability to integrate with larger companies existing sample management systems.

You can upload assignments from a tab-delimited text file, with column headings in the first row. The data file must contain the following headings: **interviewer** and **respondentid**. 'interviewer' refers to the 'User name' field from the CAPI interviewer end user list, 'respondentid' refers to the ID of the sample record project. All texts are case-sensitive.

**Note: You can also remove respondent assignments. If the 'interviewer' field is empty, the task will remove the assignment for that respondent ID.**

1. Go to the **CAPI/Kiosk > Sample Management** menu command.  
The Assign Respondents page opens.
2. In the Surveys list, select the project you wish to upload the assignments to.
3. Click **Upload Respondent Assignments**.  
The Upload Settings dialog opens.



*Figure 31 The Upload Settings dialog*

4. Browse to and select the file you wish to upload.
5. Select how you wish the assignments to be handled.  
The upload can operate in one of two modes: The default behavior replaces any existing assignments, or you can select to leave existing assignments intact (to avoid accidentally re-assigning respondents to different interviewers).
6. Select the type of encoding used for the file.
7. Select the start time and any required recurrence.
8. Click **Finish**.

The task will be performed as selected and at the time selected.

### 4.2.2. Automatic Assignment of Respondents to Interviewers during Respondent Upload

When loading respondent data into the system for a CAPI survey, you can assign the respondents to CAPI interviewers automatically. To do this the uploaded respondent tab delimited file must have a specific column included called **capiinterviewerid**. It is optional to include this column, but if it is included, a value is mandatory - ie. The column cannot be empty. The value entered must correspond to the numeric internal 'User ID' allocated to the CAPI interviewer in the end user list.

For example, in the figure below, User5 would need a value of **34287** to be automatically assigned to this respondent during respondent upload.

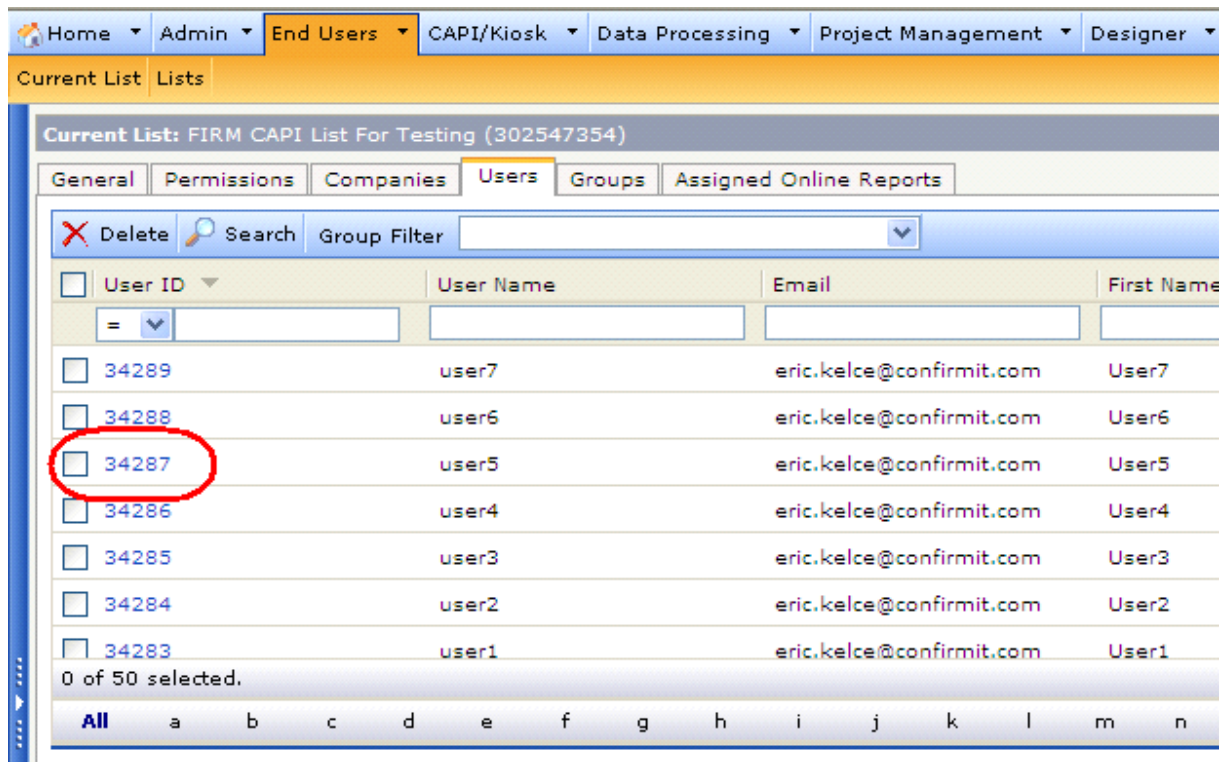


Figure 32 Example of a User ID to be used when automatically assigning respondents to interviewers

### 4.2.3. How to Re-assign Respondents to Different Interviewers

If for any reason you must change the interviewer who is assigned to a particular respondent, proceed as follows:

**Note:** Any respondent data that has been collected by the first interviewer and that has been synchronized with the server, will be transferred to the replacement interviewer when that interviewer next synchronizes, thereby enabling him/her to continue postponed surveys. Data that has not been synchronized when the first interviewer is reassigned will not be available to the new interviewer. During later synchronizations, only data for respondents currently assigned to that interviewer will be transferred. If a respondent is reassigned before collected data is synchronized, then that data will be marked as deleted (soft-deleted) in the console. To retrieve this data, reassign the respondent to the interviewer.

1. Go to the **CAPI/Kiosk > Sample Management** menu command.  
The survey list opens.
2. Select the survey you wish to work with, right-click on it and select **Assign Respondents** from the menu.  
The Interviewer and Respondent lists open.
3. In the Respondents list, select the respondents you wish to re-assign to a different interviewer.
4. In the Interviewers list, select the interviewer to which you wish to assign those respondents.
5. In the Respondents list, click **Assign**.  
A confirmation message appears.
6. Click **OK** to continue or **Cancel** to cancel the operation.  
If you click **OK**, a warning message appears –
  - o If any of the selected respondents have the status Completed, Screened or Quota Full, then these respondents will not be re-assigned.
  - o Any data that has been collected for the selected respondents, that has not yet been synchronized, will not be transferred to the new interviewer. You are therefore advised to synchronize before reassigning respondents.

7. Click **OK** to continue or **Cancel** to cancel the operation.

If you click **OK**, the selected respondents are transferred to the new interviewer.

#### 4.2.4. The Respondent Reassignment Log

This log displays details of respondent records that have been re-assigned from one interviewer to another, where data exists on the original interviewer’s device. The supervisor can then make a decision on whether or not to re-assign them back to the original interviewer. The log simplifies the process of recovering data from interviewers who were previously assigned to an interview record but who have been removed.

Scenario’s where this log may be useful include:

- The interviewer has records assigned but then is off sick and therefore records are centrally re-assigned to another interviewer.
- The interviewer has records assigned but then has technical difficulties meaning that he/she cannot synchronize and therefore records are centrally re-assigned to another interviewer.
- An interviewer has not synchronized for a long time and records have been re-assigned to another interviewer.
- Any other scenario where an interviewer is unable to synchronize to the server.

The log includes filtering and sorting capabilities, and summarizes the previous and existing assigned Interviewer. Supervisors can select records, either individually or in groups, and revert ownership back (by clicking on the " button in the menu).

1. Go to the **CAPI/Kiosk > Sample Management** menu command.
2. Select the survey you wish to see the log for.
3. On the Assign Respondents page, click **View Respondent Reassignment Log**.
4. Select the record(s) of interest and click **Revert Ownership**.

The reversion will take effect the next time the console is synchronized by the interviewer.

**Important**  
**This log does NOT allow for any merging data capabilities; there can still only be one record stored on the server.**

#### 4.2.5. Quota Management in CAPI Surveys

In CAPI surveys with quotas, you can divide the number of respondents required for each quota, among the interviewers who are assigned to this survey. This chapter only describes the CAPI-specific functions of quota management. Refer to the Confirmit Authoring User Manual for more details.

When a survey is launched as a CAPI survey (see the Confirmit Authoring User Manual), a folder called **Capi Specific** is added to the questionnaire in Professional Designer. The folder contains one single question “capiInterviewerId” and a script node “record capiInterviewerId”.

**Note: The single question “capiInterviewerId” must not be modified.**

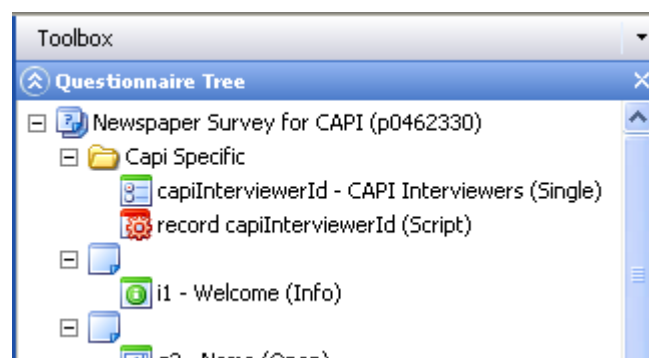


Figure 33 Example of CAPI-specific objects in the questionnaire

These CAPI-specific objects set the CAPI Interviewer ID in the survey, and they can be used in for example quota management to insert the interviewer identification into the quotas.

When you set up a quota, for example on Gender in our example (refer to the Confirmit Authoring User Manual for information on how to set up quotas), you can also drag the “caplnterviewerId” question into the quota and distribute the quota among the interviewers.



Figure 34 caplnterviewerID in a quota

Double-click on the quota or right-click and choose **Edit** to display the cells in grid format for each variable in the question by each interviewer.

Quota Grid					
Settings					
CAPI Interviewers					
Gender	johnd	saraj	alexc	jamesb	Total
Male	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Female	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Total	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Figure 35 Example of a quota distribution grid

The variables “Male” and “Female” are displayed as rows and the assigned interviewers as columns in the quota grid, with cells for both “Male” and “Female” available.

Quota Grid					
Settings					
CAPI Interviewers					
Gender	johnd	saraj	alexc	jamesb	Total
Male	<input type="text" value="38"/>	<input type="text" value="38"/>	<input type="text" value="37"/>	<input type="text" value="37"/>	<input type="text" value="150"/>
Female	<input type="text" value="38"/>	<input type="text" value="38"/>	<input type="text" value="37"/>	<input type="text" value="37"/>	<input type="text" value="150"/>
Total	<input type="text" value="76"/>	<input type="text" value="76"/>	<input type="text" value="74"/>	<input type="text" value="74"/>	<input type="text" value="300"/>

Figure 36 Example of distributed quotas (1)

You can fill in the quota limits in the Total column for each variable, then right-click and choose **Distribute**. The number in the Total column will then be distributed evenly amongst the interviewers. If some interviewers are to interview respondents for only one variable, for example only "Male", you can change the quota limits manually. The Total cells are updated automatically.

CAPI Interviewers					
Gender	johnd	saraj	alexc	jamesb	Total
Male	38	38	37	37	150
Female	0	0	75	75	150
Total	38	38	112	112	300

Figure 37 Example of distributed quotas (2)

When an interviewer has filled up the quota, an email is sent to the address entered in the quota **Settings**. Information about the quota and the CapilInterviewerId will be included in the email.

Respondents who are registered with status **Quota full** will be displayed in the Survey homepage/information page.

Refer to the Confirmit Authoring User Manual for more details on Quotas and Quota Management.

### 4.3. Synchronization Status

CAPI supports the following synchronization tasks when the interviewer console is connected to the Internet:

- New or updated surveys are downloaded to the interviewer console, including any graphics and multimedia elements that are included in the survey in Confirmit.
- Personal quotas and Samples are downloaded to the interviewer consoles.
- Response data is uploaded from the console to the central servers.
- The supervisor and the interviewer workforce can communicate through the unique messaging system.
- New Interviewer Console versions and applications are automatically downloaded to and installed in the interviewer PCs.
- Files are transferred to/from the file library.

**Note: All data flowing between interviewer consoles and the centralized server is encrypted.**

When you have assigned surveys to interviewers, and the surveys are live, every time you make a change in a survey and re-launch it the interviewers will need to download the new version of the surveys during synchronization. The same applies to response data; as the interviewers collect data and send it to Confirmit, the CAPI supervisor may need to track how many complete or incomplete responses each interviewer has gathered and transferred.

1. Go to **CAPI/Kiosk > Synchronization Status**. The Synchronization Status page opens.

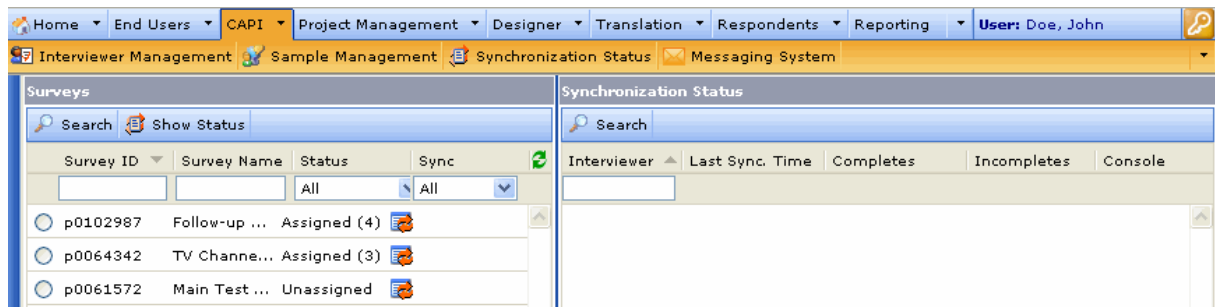


Figure 38 Example of the Synchronization Status page

The frame on the left displays all surveys that have been launched as CAPI surveys and to which the CAPI Supervisor has access. The list behaves in the same way as all lists in Confirmit: it is searchable, and you can sort it in descending or ascending order by clicking on the column titles (Survey ID, Survey Name). The Sync column will show for each survey whether or not synchronization is enabled.

### 4.3.1. How to Enable and Disable Synchronization

By default, all CAPI surveys have Synchronization **disabled**. This means that the user or administrator must enable synchronization before the interviewer console can be synchronized with Confirmit.

There are two routes to enable and disable synchronization:

Either -

1. Go to the **CAPI/Kiosk > Interviewer Management** menu command. The Interviewer Management page opens.

Or -

2. Go to the **CAPI/Kiosk Synchronization Status** menu command. The Synchronization Status page opens.

In either page, click on the icon in the Sync column to toggle the status, then confirm the action.

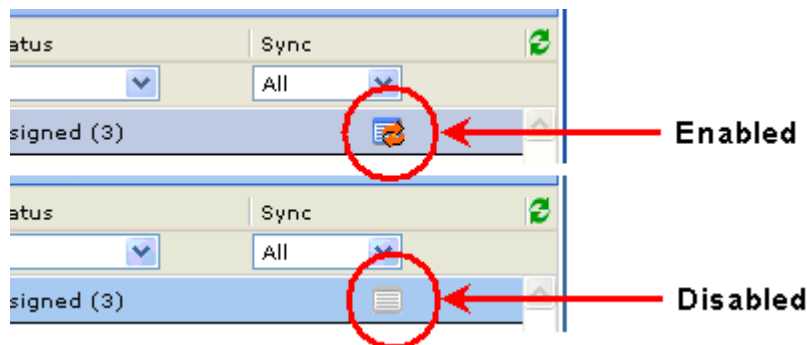


Figure 39 Enabling and disabling synchronization

When an interviewer synchronizes a console, any new surveys to which they have been assigned will be downloaded from the server and existing surveys will be updated, and any surveys from which they have been removed will be removed from the console.

### 4.3.2. The Synchronization Frame

The Synchronization Status frame is by default empty. To show the synchronization details of a survey:

1. In the Synchronization Status page, click on the radio button for the survey you wish to see the status for.
2. Click **Show Status**.

All interviewers who are assigned to this survey will be displayed in the Synchronization Status frame. The list shows the following information for each interviewer:

- The last time the interviewer synchronized his/her console with the centralized server (Last Sync. Time).
- The number of Completes and Incompletes that the interviewer has transferred to the centralized server.
- The Console column shows information about the console that the interviewer is using, for example to which Company on the centralized Confirmit server the user is attached, and if the user is online or offline.
- The Version column shows which survey version the interviewer has on the console.
- The Status column shows the survey version status. There are four statuses:
  - o **Green bulb – Latest version.** Indicates that the survey currently in the console is the latest version.
  - o **Yellow bulb – Old version.** Indicates that the survey currently in the console is an old version.
  - o **Red bulb –No survey.** Indicates that the interviewer has not yet downloaded the survey.
  - o **Unknown version –** Indicates that the survey currently in the console is an unknown version.

The illustration below shows that as yet no responses have been transferred to this survey.

Synchronization Status						
Interviewer	Last Sync. Time	Completes	Incompletes	Console	Version	Status
alex	-	-	-	872dc4ef-0238-48fe-b813-b44e8bb5f80e	2	Yellow bulb
jamesb	-	-	-	-	-	Red bulb
johnd	-	-	-	UserGuide Comapny Ltd. 1	12	Green bulb
saraj	-	-	-	UserGuide Comapny Ltd. 1	12	Green bulb

Figure 40 Example of the Synchronization Status page for a survey

Surveys		Synchronization Status								
Survey ID	Survey N...	Status	Sync	Interviewer	Last Sync. Time	Completes	Incompletes	Console	Version	Stat
p01029...	Follow...	Assigne...	All	johnd	8/24/2005 10:15:16 AM	1	0	UserGuide Comapny Ltd. 1	10	Green bulb
p00643...	TV Cha...	Assigne...	All	richg	-	-	-	872dc4ef-0238-48fe-b813-b44e8bb5f80e	6	Yellow bulb
p00615...	Main T...	Unassi...	All	saraj	9/27/2005 5:34:24 PM	18	2	UserGuide Comapny Ltd. 1	10	Green bulb

Figure 41 Synchronization Status with responses

The example above shows that “saraj” has gathered and transferred 18 Completes and 2 Incompletes, while “johnd” has gathered and transferred only 1 Complete. “richg” has an old version of the survey.

### 4.3.3. Partially Collected Data

In environments where CAPI consoles may be shared by users throughout the project lifetime, where the same respondent may be downloaded to several devices throughout the respondent’s lifetime, or where multimodal data capture is performed, there may arise instances of "partial data synchronization" ("partial data" being interviews that are not yet completed - typically interviews with the status "incomplete"). CAPI/Kiosk Console behavior regarding partially collected data is as follows:

1. Postponed or partially completed data will be sent from the Confirmit environment to the CAPI/Kiosk console upon synchronization, unless the data is unchanged since it was last delivered to the console.
2. If a CAPI respondent re-assignment is performed, partial data on the server will be (re-)sent to the console irrespective of whether the data has been previously been sent.
3. If a console has data pending synchronization and the CAPI/Kiosk interviewer is assigned to this respondent, the data will be synchronized to the Confirmit environment and will overwrite any data currently stored for this respondent.

4. If partial data exists on the console for a respondent and data is delivered from the Confirmit environment, the delivered data will overwrite the console data for this respondent.
5. If a respondent exists on the console but there is no data collected on the console, data delivered from the Confirmit environment will overwrite the console data for this respondent.
6. The description field for an interview is always based on the local (console) data and is not updated when the data is overridden.

#### 4.3.4. Effects of Deleting Data

If CAPI response data has been synchronized to the server and that data is later deleted from the server, when the console is re-synchronized the following rules apply:

Action on Server	Result on Console after re-synchronization
Response data is deleted	<ul style="list-style-type: none"> <li>- Respondents whose responses have been deleted are changed to NotStarted status and their response files in the console are deleted.</li> <li>- This applies to respondents with the Source=Server or Source=Console.</li> <li>- All quotas for the affected project are recalculated.</li> </ul>
Respondents are deleted	<ul style="list-style-type: none"> <li>- If the respondents have the status NotStarted, they are hard-deleted (they are removed from the cache and the files are deleted). If they have another status they are soft-deleted.</li> <li>- Quotas for the affected project are not recalculated.</li> </ul>
Both data and respondents are deleted	<ul style="list-style-type: none"> <li>- If the respondents have the status NotStarted, they are hard-deleted (they are removed from the cache and the files are deleted). If they have another status they are soft-deleted.</li> <li>- The response files are deleted.</li> <li>- You must manually Recalculate All to recalculate the Quotas for the affected project.</li> </ul>

#### 4.4. The Messaging System

CAPI has a fully integrated messaging system that allows CAPI Supervisors to communicate with the interviewer workforce. In general, the messaging system functions in the same way as most email systems.

**Note: Messaging is not supported on the CAPI app.**

1. Go to the **CAPI/Kiosk > Messaging System** command to open the Messaging System page.

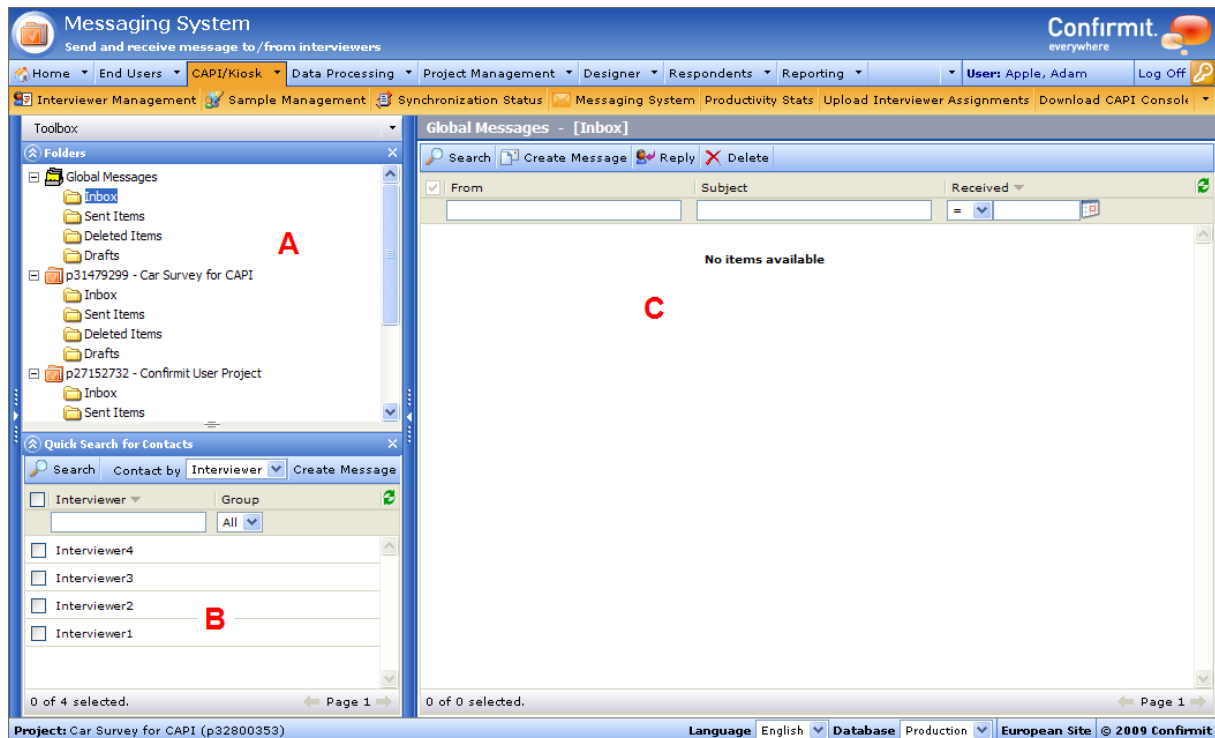


Figure 42 Example of the Messaging System page

The column to the left is the Toolbox. This contains the Folders hierarchy and the Quick Search for Contacts toolbox. You can show or hide both of these items by right-clicking in the Toolbox header and selecting or deselecting the items as appropriate. To expand and collapse the items whilst keeping the headers visible in the toolbox, click on the headers.

Area **A** is the Folders hierarchy.

This contains main folders for Global Messages and each of the CAPI surveys to which the supervisor has access. Global Messages are any messages that are not specific to one particular survey. Each main folder contains an Inbox, Sent Items, Deleted Items and Drafts sub-folders. Click the +/- icons to the left of the folder names to expand or collapse the folders as required.

To open a folder, double-click on the icon in the hierarchy. When you open a folder, the area to the right displays a list of any messages contained in that folder.

In the example above, the supervisor has opened an Inbox folder for one of the surveys.

Area **B** is the Quick Search for Contacts toolbox.

This lists the interviewers (or groups) who are assigned to the survey that is selected in the Folders hierarchy. If the Global Messages folder is selected, all interviewers are listed.

Area **C** is the message list.

Double-click on a main or sub folder in the Folders hierarchy to show any messages contained in that folder. You can search and sort this list as desired to find any required messages.

#### 4.4.1. How to Create a New Message/email

1. In the Quick Search for Contacts toolbox, click in the checkbox for the interviewer or interviewers to whom you wish to send a message.

To select all the interviewers in the list, click the checkbox at the top of the column under the **Search** button. You can also select the recipients later (see Selecting and Changing Email Recipients on page 35 for more information)

2. Click **Create Message**.

The Create Message frame opens towards the right of the window.

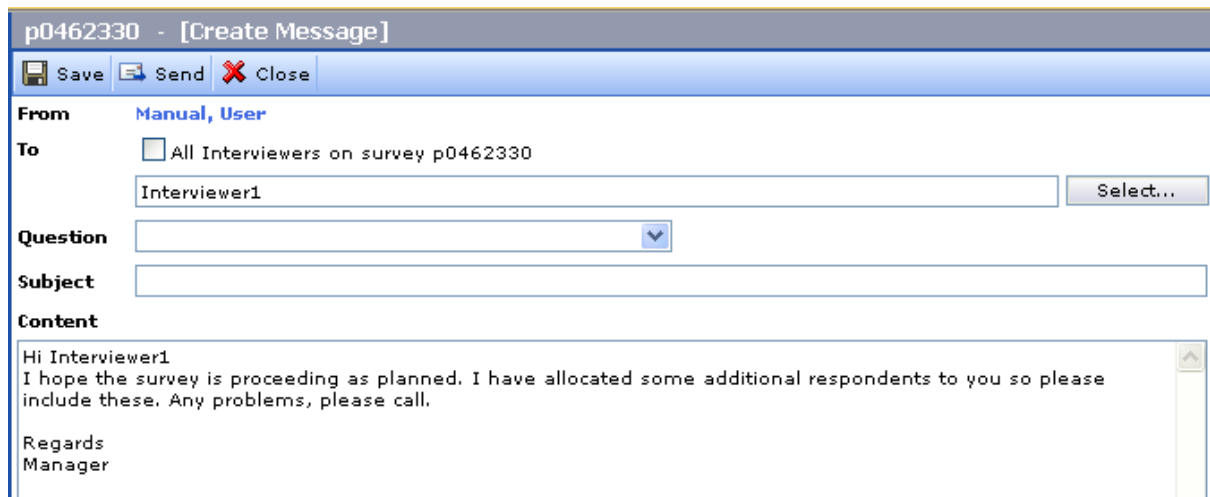


Figure 43 Example of the Create New Message page

If no specific interviewers are selected, the text “All Interviewers” (if Global Messages is selected in the Folders hierarchy) or “All Interviewers on survey pXXXXXXXX” (if a specific survey is selected) will be displayed next to the **To** check-box.

3. Check the **To** checkbox to confirm the suggested recipients or make other selections (see Selecting and Changing Email Recipients on page 35 for more information).
4. Compose the email that is to be sent to the selected interviewers.
5. On completion, click **Send** to send the email.

If you create the message in a survey-specific folder, a **Question** field is displayed on the message form. If the message to the interviewers concerns a specific question in the survey, you can select the question from a drop-down menu in this field such that it is highlighted on the message form.

When you enter the **Content** field, the WYSIWYG HTML mode toolbar is activated and you can format your text using the toolbar buttons and drop-down menus. You can switch between WYSIWYG HTML mode and Plain Text mode when composing the email message.

#### 4.4.2. How to Reply to a Message

1. To reply to a received message, select the message and click **Reply**.
2. Compose the message, then click **Send**.

#### 4.4.3. How to Delete a Message

Find the message you wish to delete and select it.

1. Click **Delete**.

The message is moved to the **Deleted Items** folder for the appropriate project. To delete the message permanently:

2. Go to the **Deleted Items** folder and delete it from there.

**Note:** Any items that you delete will be moved to the Deleted Items sub-folder, either in the Global Messages folder or a survey folder depending on where the message was located before deletion. These items can be undeleted and returned to the sub-folder from which they were deleted. If you delete a message in the Deleted Items sub-folder, it is deleted permanently and cannot be recovered.

#### 4.4.4. Selecting and Changing Email Recipients

If you do not select the option offered in the **To** field, the **Select** button will be active.

1. Click **Select**.

The Select Contacts pop-up window opens. This window displays all interviewers for the active survey, or all interviewers if the Global Messages folder is active.

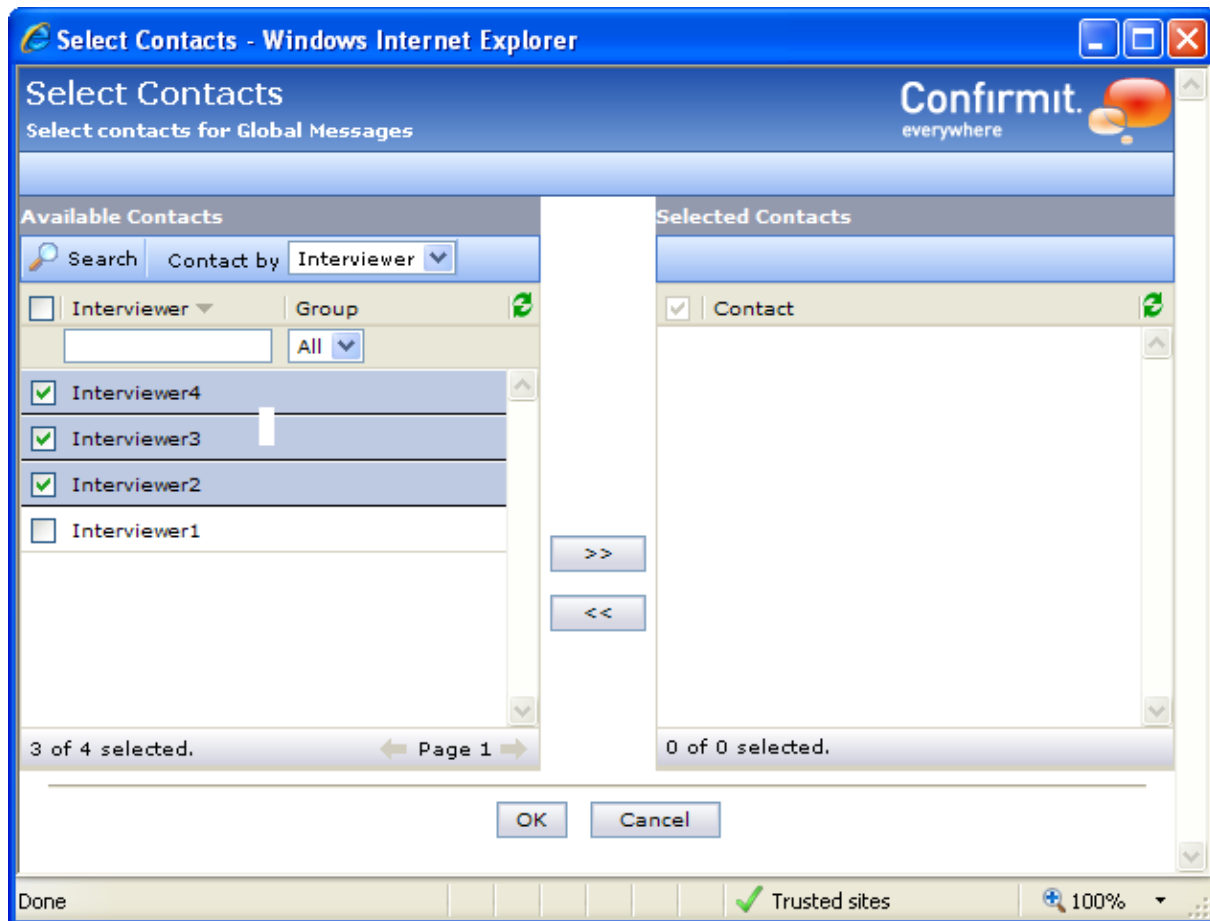


Figure 44 Example of the Contacts pop-up

2. In the **Available contacts** list, select the interviewers.
3. Click the >> button to move them to the **Selected contacts** list.  
If the Available contacts list is extensive, you can search and sort the list as necessary to find the required contacts.
4. On completion, click **OK** to add the selected interviewers to the list.

#### 4.4.5. Additional Functionality

In the Quick Search for Contacts frame, you can search for interviewers in the Interviewer column, and this column can be sorted alphabetically. You can put interviewers into groups based on, for example, the area where they will be performing the interviews. You can then search for interviewers by groups in the Group drop-down. All groups that have been created in the interviewers' End User List will be displayed here (see Requirements Prior to Commencing Installation/Setup on page 4 for more information)

### 4.5. Productivity Stats

The CAPI/Kiosk interface includes interviewer productivity reporting. The report provides built-in productivity reporting statistics for surveys launched after the C12.5 launch date.

**Note: No interview productivity data will be available for surveys launched before this date, nor will interview data be included in the report until the survey is launched after the C12.5 upgrade.**

The data presented within this report is available without the need to make any changes to the questionnaire itself, and it does not rely on any specific questions within the questionnaire.

The productivity reporting is available from the **CAPI/Kiosk** menu and can be launched in one of two modes:

- Company-wide (across multiple surveys)

- Survey-specific

The report in both cases is essentially the same, however loading the report company-wide allows you to select the desired survey in addition to the other selection criteria.

### 4.5.1. The Company-wide Report

To load the company-wide report:

1. Go to the **CAPI/Kiosk > Productivity Stats** menu command.  
The Productivity Stats selection page opens as shown below.

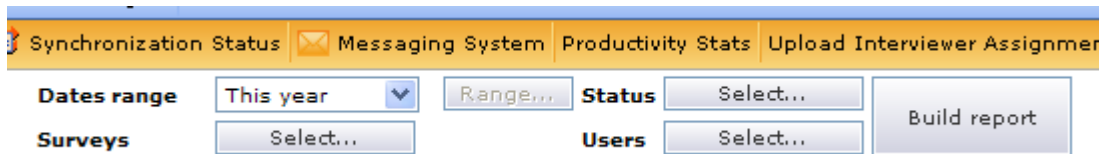


Figure 45 The Productivity Report selection page

2. Click on the various fields to open drop-down lists of the options available, then click in the appropriate check-boxes to make the required selections of dates, surveys, status and users. For each selection box, click **OK**.

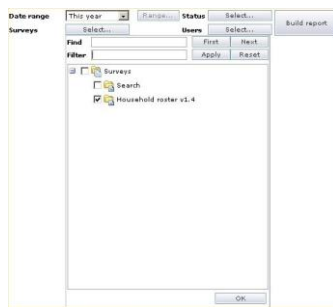


Figure 46 Example of selecting the survey

3. On completion, click **Build Report**.  
The resulting report is displayed as shown in the example below.

User number	Username	Interview count	Total count	Interviewing time	Average time	Status
355	pl_cap01	7	7	00:08	00:10	
		3		00:08	00:13	Complete
		4		00:30	00:08	Screened
366	pl_cap02	3	3	02:04	00:22	
		3		02:04	00:21	Screened
Average for survey:		5.00		02:08		
Sum for survey:		10		02:12		

Figure 47 Example of a productivity report

### 4.5.2. The Survey-specific Report

To load the survey-specific report:

1. Go to the **CAPI/Kiosk > Interviewer management** or **Sample management** menu command.
2. Select the required project.

3. Click the **Productivity stats** button.

The Productivity Stats page opens as shown below.

The screenshot shows the 'Productivity stats' interface. At the top, there are filters for 'Dates range' (set to 'This year'), 'Status' (set to 'Select...'), and 'Users' (set to 'Select...'). A 'Build report' button is also present. Below the filters, the report details are displayed: Start date: 01/01/2008, End date: 31/12/2008, Status: All, Users: All, Surveys: p0575011. A table below shows the data for the selected survey, with columns for User number, Username, Interview count, Total count, Interviewing time, Average time, and Status. The table shows a total of 0 interviews and 00:00 time spent.

User number	Username	Interview count	Total count	Interviewing time	Average time	Status
-	-	0	0	00:00	00:00	
		0		00:00	00:00	-
Average for survey:		0.00		00:00		
Sum for survey:		0		00:00		

Figure 48 Example of the Productivity Stats page

4. Click on the various fields to open drop-down lists of the options available, then click in the appropriate check-boxes to make the required selections of dates, status and users.
5. On completion, click **Build Report**.

The report is presented as for the company-wide report.

### 4.5.3. The Report Information

The report presents the following information:

- Header information:
  - o Date and time the report was run (localized to supervisor PC where browser is running).
  - o Start date: The selected date that the report is applicable from.
  - o End date: The selected date that the report is applicable to.
  - o Status: All selected statuses (Complete, screened, Quota fail, Error, Incomplete).
  - o Users: A comma-separated list of users selected or 'All' as appropriate.
  - o Surveys: A comma-separated list of surveys selected or 'All' as appropriate.
- Report data:
  - o Survey: The name of the survey.
  - o Username: The interviewer login name.
  - o Interview count: Total count of interviews completed by this interviewer in the selected statuses.
  - o Total count: Total number of interviews completed by this interviewer in all statuses.
  - o Interviewing time: mm:ss spent interviewing for that row.
  - o Average time: Interviewing time / Interview count for this row.
  - o Status: The status this row's data refers to, there will be one row per status, per interviewer that has a non zero count.
- Below the list of all users that have worked on the selected survey(s) is:
  - o Average for survey: Total count / Number of interviewers in the list.

- o Sum for survey: Total count of interviews worked on for this survey.

At the top of the report is a toolbar. This allows the viewer to select a specific page in the report, go to the start/end page or jump to a specific page.

The report can be exported to any of the following formats:

- Crystal reports
- Adobe Acrobat
- MS Word
- MS Excel
- Rich Text Format

In addition, you can generate a printer-friendly version of the report such that it can be printed out.

**Note: This report relies on the synchronization of productivity data. If any issues arise whilst the date is being synchronized, then a message will be displayed to the CAPI Supervisor during assignment and launching operations. If this should occur, a user with SYSTEM\_CAPI\_ADMINISTRATE permission is able to synchronize the unsynchronized data.**

**For On-Premise customers this requires additional hardware and SQL configuration. Contact Support for further details.**

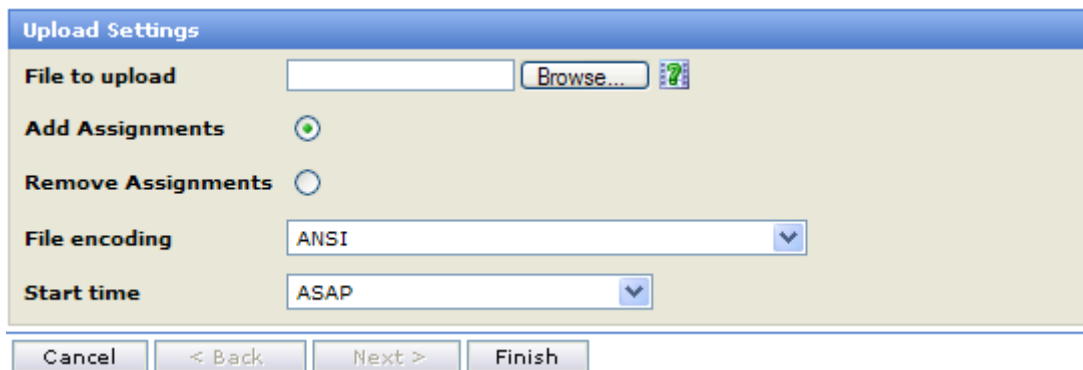
## 4.6. Uploading Interviewer Assignments

In the event you have a large field force, where a large number of assignments need to be made on a regular basis, this function enables you to upload the assignments from a tab-delimited text file.

The data file must contain the headings **interviewer** and **projectid**. 'interviewer' refers to the 'username' field from the CAPI end user list, while the 'projectid' refers to the Confirmit project number. All texts are case-sensitive.

**Note: The columns in the file to be uploaded MUST be in the order: interviewer, projectid.**

1. Go to the **CAPI/Kiosk > Upload Interviewer Assignments** menu command.  
The Upload Settings dialog appears.



*Figure 49 The Upload Settings dialog*

2. Browse to and select the file you wish to upload.
3. Select whether you wish to add or remove assignments.
4. Select the type of encoding used for the file.
5. Select the start time and any required recurrence.
6. Click **Finish**.

The task will be performed as selected and at the time selected.

## 4.7. Downloading the CAPI Console

The **CAPI/Kiosk > Download CAPI Console** menu command enables you to send via email a URL from where the CAPI Console application can be downloaded (see Downloading the CAPI Console Installation Files on page 9 for more information). Select the menu command to open the dialog below.

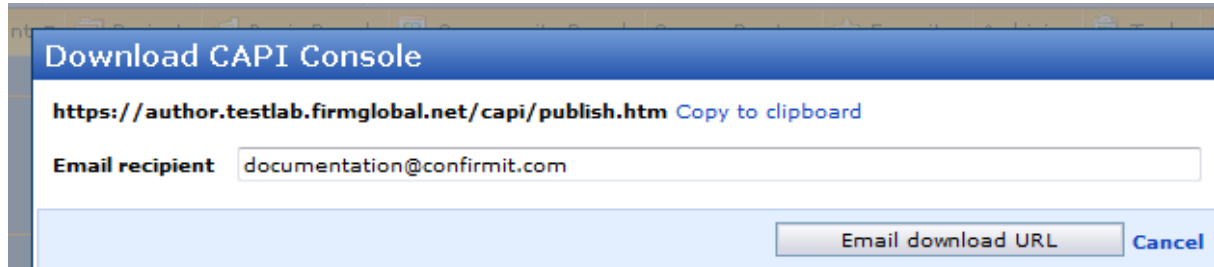


Figure 50 The Download CAPI Console dialog

To send the URL to the designated email address, click **OK**. You can also copy the URL to your clipboard and thereafter paste it into another document as required.

## 4.8. Admin

This menu contains the functionality that is only accessible to the CAPI Administrator. These functions are described in the following sections.

### 4.8.1. Console Management

If a Confirmit user has the **system\_capi\_administrate** permission, the user will also have access to the Console Management functionality. This will normally be the same user who can generate the CAPI Activation files / codes.

This module for CAPI/Kiosk administrators provides an overview of all company consoles, their status (activated or deactivated), the ability to deactivate consoles not being used, and with the option of recording and listing relevant information on the consoles (CAPI version, operating system, owner information, contact information).

1. Go to the **CAPI/Kiosk > Admin > Console Management** menu command to open the Console Management page.
2. The latest console and Android versions are given at the top of the page.
3. Use the **View Mode** drop-down to select **Console Information** or **Synchronization Schedule**.

**Note: The ability to schedule synchronization is not supported by the CAPI app.**

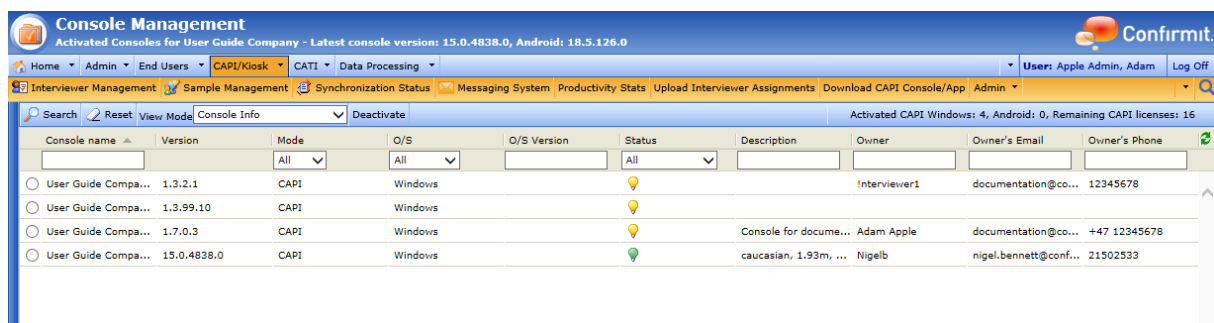


Figure 51 Example of the Activated Consoles page

This page lists all CAPI/Kiosk consoles that are activated for the company. All columns are searchable and sortable.

- **Console name** – the name of the console.

- **Version** – information about which CAPI/Kiosk version is installed on the console.
- **Mode** – whether the console is in CAPI or Kiosk mode.
- **O/S** - indicates the operating system in use for that console or device.
- **Status** – whether the console has the most recent version of CAPI installed or an older version.
- **Description, Owner, Owner’s Email, Owner’s Phone** – fields for additional information.

The number of activated licenses listed by operating system, and the number of available licenses remaining, are displayed at the right end of the page toolbar.

#### 4.8.1.1. How to Edit the Console Details

You can enter the details of each console, for example its name or registration number, the name of the owner/current user, the CAPI version installed etc. into the system.

1. In the Activated Consoles list, select a console, right-click on it, then choose the **Console Details** option from the menu.

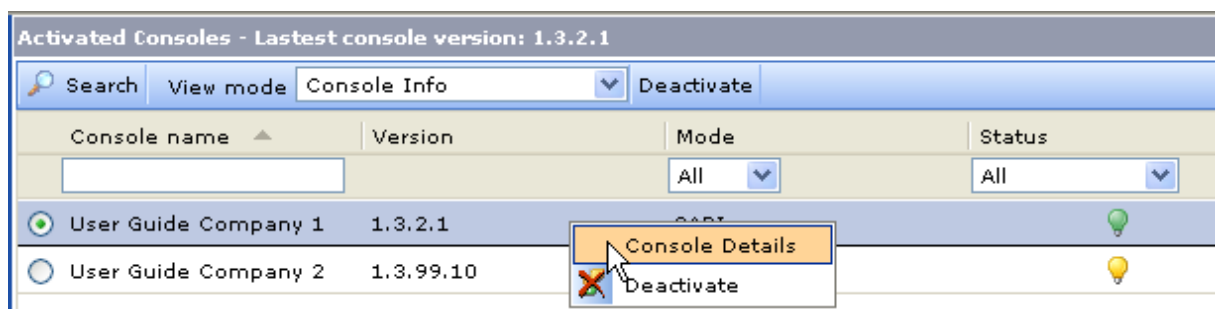


Figure 52 Opening the Console Details frame

A new frame opens towards the right side of the window.

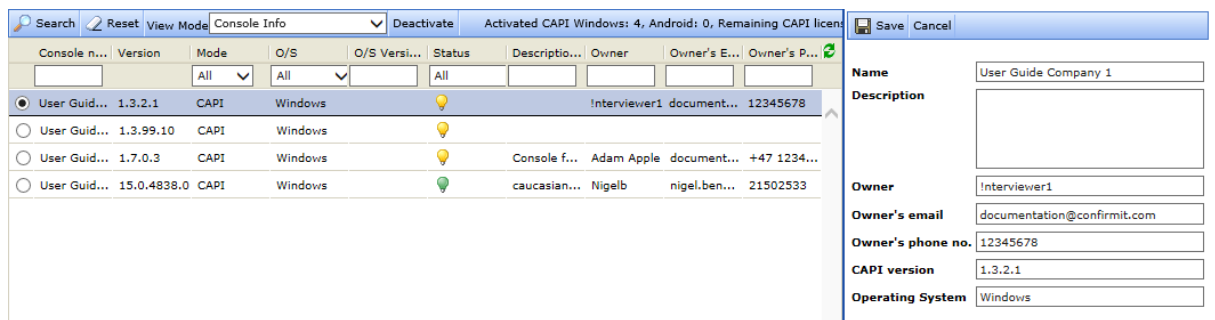


Figure 53 Example of the Console Details frame

2. Enter the console details and other information as required.
3. On completion, click **Save** to save the information.

When you click **Save**, the information is displayed in the various fields as appropriate in the Activated Consoles frame.

#### 4.8.1.2. How to Deactivate a Console

In the Activated Consoles list, select the console you wish to deactivate, right-click on it and select **Deactivate** from the menu.

The selected interviewer console is deactivated and the interviewer will not be able to log on to the console. A license is freed, allowing a different console to be activated if required (see Installing and Activating CAPI/Kiosk on Interviewer Stations on page 4 for more information).

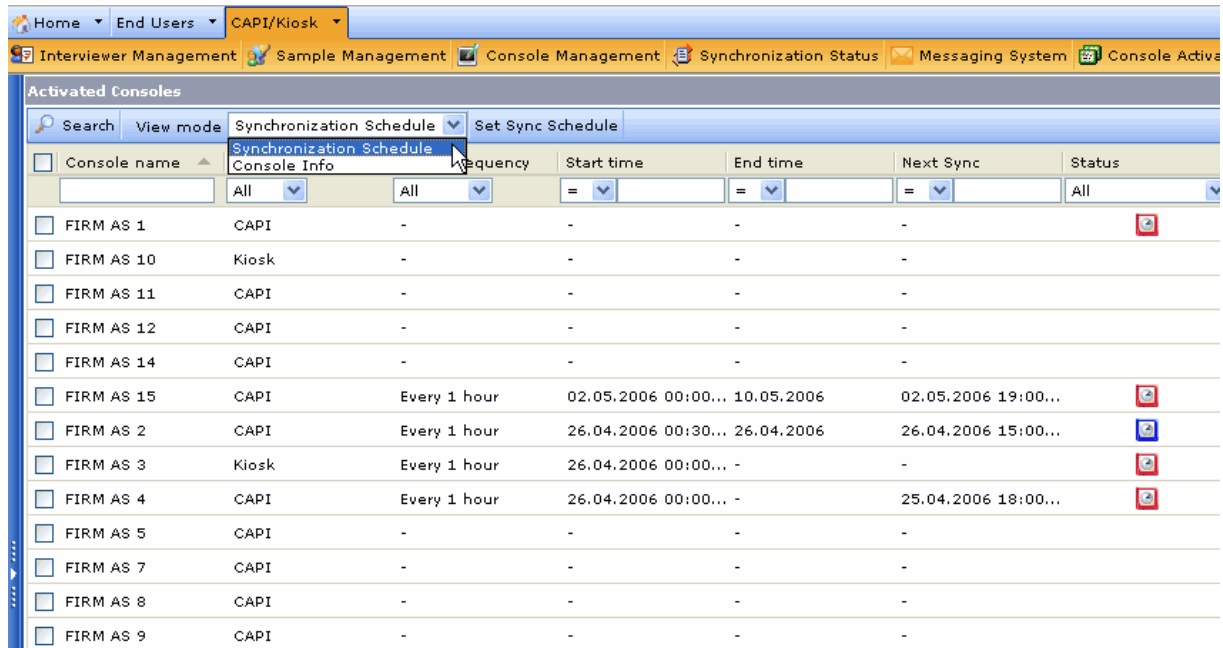
### 4.8.1.3. View Mode > Synchronization Schedule

Use Synchronization Schedule to preset the times the consoles are to synchronize with the central server. The synchronization schedule for a console can be defined from the server or locally on the console.

**Note: The ability to schedule synchronization is not supported by the CAPI app.**

1. Go to the **View mode** drop-down and select the **Synchronization Schedule** option.

The **Synchronization Schedule** page opens.



**Figure 54 Example of the Synchronization Schedule page**

2. Click on the appropriate boxes in the left column to select the console or consoles for which the synchronization schedule is to be defined.
3. Click the **Set Sync Schedule** button.

The Synchronization Schedule dialog box opens.

**Figure 55 Synchronization Schedule settings**

Use this dialog box to define when synchronization is to be performed.

- **Schedule Type** – select Hourly, Daily, Weekly, or Monthly. The other options available depend on the Schedule Type selected.
- **Start by and End by** – define when the synchronization operation is to start and end. Depending on the Schedule Type selected, you can also define how often synchronization is to run, for example every 4 hours, every 3 days etc.
- **Spread** – use to define when the next console in line is to start synchronizing. The setting shown above indicates the next synchronization operation is to start 15 minutes after the previous one.
- **Apply this change to all consoles on the list** – on saving, the new schedule will be applied to all consoles listed in the Activated Consoles list, including those that were not selected.

The Synchronization Schedule can also be modified on the individual CAPI/Kiosk Consoles (see Console Settings on page 65 for more information).

### 4.8.2. Console Activation

This menu command opens the CAPI/Kiosk Activation page for sending activation files to the console administrators (see The Activation Files for Windows on page 6 for more information).

### 4.8.3. Synchronization Log

On this page, you can view a log of the console synchronization operations that have been performed for the various consoles in your company. The log shows details such as console name, interviewer name, the synchronization start time, the duration of the synchronization task, the number of responses transferred, status of the synchronization etc.

**Note: You must have System\_Administrate or System\_Capi\_Administrate permission to access this menu command.**

**Note: The Synchronization Log page will only show synchronizations that are performed in Confirmit v.11 or later.**

1. Login to Confirmit.

- Go to the **CAPI/Kiosk > Admin > Synchronization Log** menu command.

The CAPI Console Synchronization Log page opens. This page shows all the synchronization operations performed for your company.

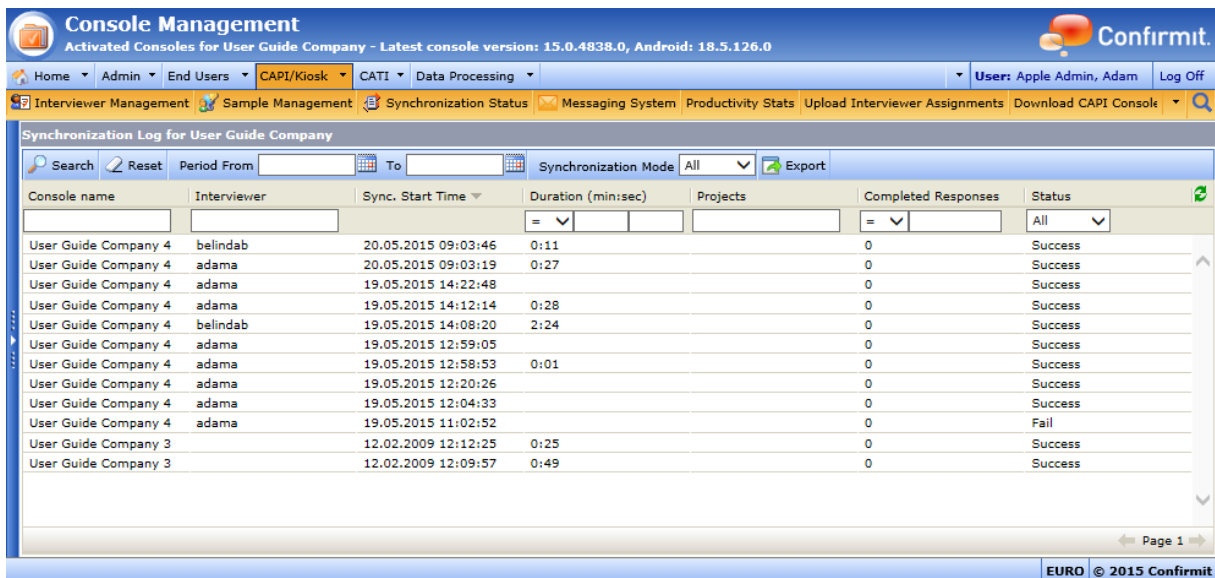


Figure 56 Example of a Console Synchronization Log page

- “Project ID - pxxxxxx” will be displayed in the Projects column when responses have been synchronized over to the server.
- If the list is extensive or you are looking for particular details, you can filter the list by entering dates into one or both of the date filter fields. You can also specify whether you wish to view all synchronization tasks, only those tasks that were initiated automatically, or only those that were initiated manually.
- You can export the list via email (see How to Export the Synchronization Log on page 44 for more information).

#### 4.8.3.1. How to Export the Synchronization Log

To export the list via email:

- On the CAPI Console Synchronization Log page, click **Export**.

The Export CAPI Console Synchronization Log overlay opens.

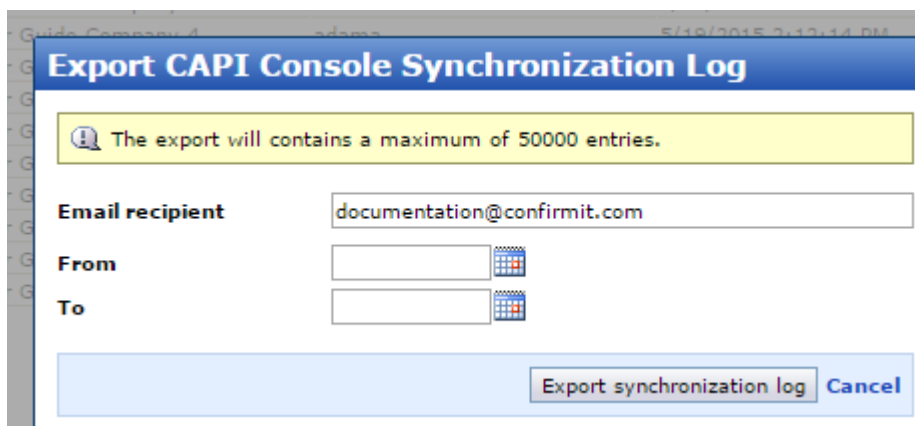


Figure 57 The Export CAPI Console Synchronization Log overlay

2. As required, edit the email address to which the log is to be sent. The default address is that of the currently logged on user - you.
3. If you wish to export only a subset of the logged items, set the date filters as required.
4. Click **Export synchronization log**.  
The log is downloaded as a zipped, tab-delimited .txt file, and the file is attached to an email and sent to the specified address.

#### 4.8.4. Console Admin Setup

Only the CAPI Administrator has access to this feature and is allowed to set up the console administration.

The CAPI Administrator must allocate the Console Administrator permission to a specific user for the company (see How to Create a Console Administrator Account on page 45 for more information).

The Console Administrator can then log on to any console attached to the user's company. A user logged on to a console as the Console Administrator has permission to manage interviewers, can view the detail per survey, and the interviewer's synchronization status. The administrator can pre-synchronize or synchronize surveys for one or more selected interviewers, and view other details, such as: # Complete, # Postpone, # Complete Synchronized and quota information, of survey synchronizations for individual interviewers.

##### 4.8.4.1. How to Create a Console Administrator Account

1. Login to Confirmit with the SYSTEM\_CAPI\_ADMINISTRATE account.  
This is the Administrator permission held by the person who installed and set up the console (see Downloading the CAPI Console Installation Files on page 9 for more information).
2. Go to the **CAPI/Kiosk > Admin > Console Admin Setup** menu command.  
The Console Admin Setup dialog appears.

Figure 58 The Console Admin Setup dialog

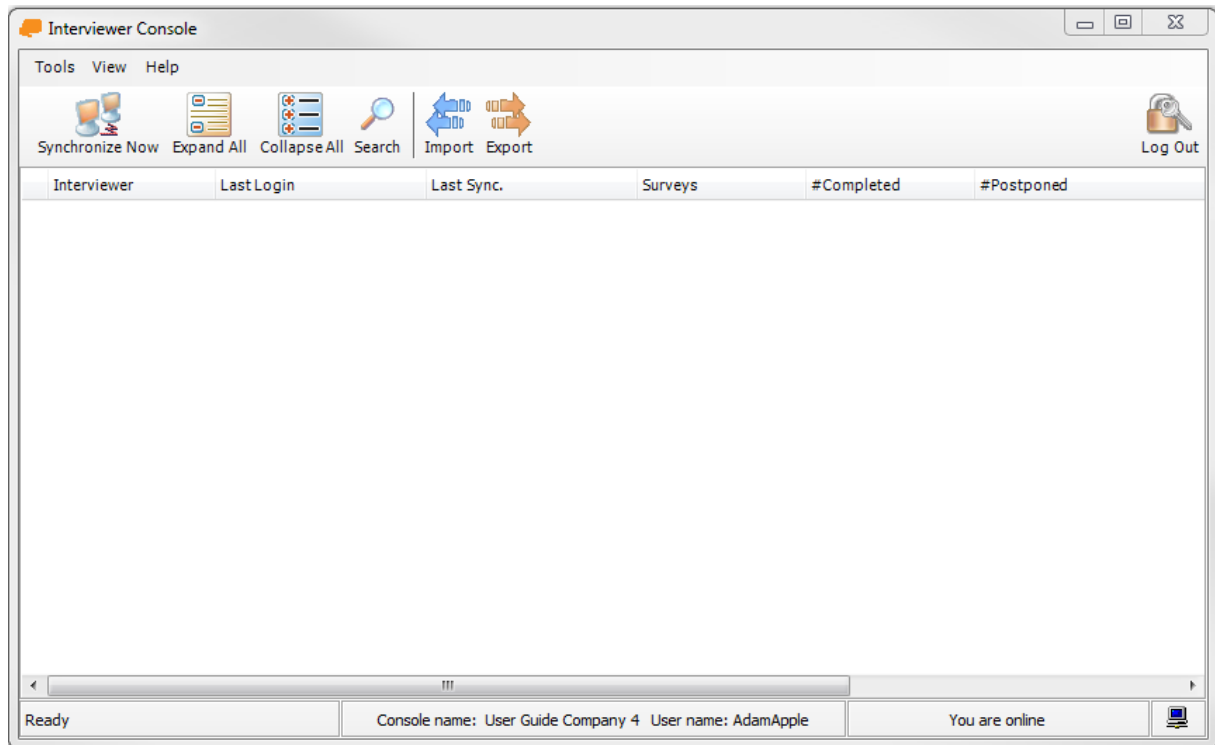
3. Type in a User Name and Password, and confirm the password, for the new console administrator.
4. Click **Save**.

A message appears confirming creation of the administrator account. A user logging on to a console, which has been synchronized after the console administrator was set up, with this user-name and password, will now have Console Administrator permission.

**Note: This administrator account is valid for all consoles activated for the same company.**

##### 4.8.4.2. Logging on as an Administrator

If you log onto the console as the Administrator, then the window looks as shown below.



**Figure 59 Example of the console window for an Administrator**

Each interviewer registered in the console is listed. Functions available in the window are as follows:

- **Interviewer survey details** – click on an interviewer to see the survey details for that interviewer. The details include the interviewer’s name, the last time the interviewer logged in, when they last synchronized, the surveys they are assigned to, the number of completed and postponed interviews. To expand/collapse the information for all interviewers, click the **Expand All/Collapse All** buttons on the toolbar.
- **Quota information** – click on a survey’s **Quota Information View** link to open a pop up with the survey’s quota information.
- **Search for interviewers** – to find a particular interviewer, click the **Search** button. The Search menu appears. Enter search criteria into the desired fields and click **Search** to search for the information.
- **Select interviewers** – using standard Windows techniques, click the > icons in the left column to select the required interviewers in the list, then click **Synchronize Now** to synchronize the selected interviewers. The synchronization log and progress pane appears.
- **Import and export** – enable an administrator to transfer all the interviewer and respondent data from one console to another in the event of for example a hardware malfunction. See the next section for details.

**4.8.4.3. Export / Import**

These functions enable an administrator to transfer all the interviewer and respondent data from one console to another. This is intended for use in the event of for example a hardware malfunction. Export gathers together all the data in the console into one file, and places that file in a specified location. Import then imports that file into another console. All the data in the console is exported/imported – you cannot select the data from just specified interviewers or respondents.

**Note: The Import function will overwrite all the data currently on the receiving console, with the data from the imported file.**

1. In the “old” console, click **Export**.  
The Export Data dialog opens.
2. Specify the folder and file name for the export file.
3. Click **Save**.

All the interviewer and respondent data in the console is gathered into one file and exported as specified.

4. In the “new” console, click **Import**.  
The Import Data dialog opens.
5. Click **Browse** to open a standard Windows file selection dialog.
6. Find and select the file you wish to import, then click **Open** to input the file path and name into the File to Import field.
7. Click **Import** to import the file.

**Note: All data currently in the receiving console will be deleted and replaced by the data in the imported file.**

### 4.8.5. Default Respondent Data Columns

This functionality enables supervisors to specify a default list of respondent information columns that are to be displayed in the CAPI consoles under View Respondents (see Changing the Information Columns on page 58 for more information). This is a company-wide default list that will apply for all projects; however the company default setting can be overridden for individual projects and consoles as required.

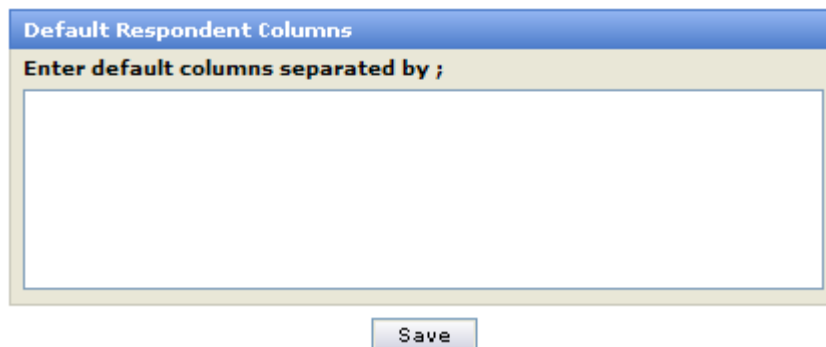
**Note: If the company-wide default settings are overridden for an individual project, then any later changes to the default settings will not be applied to that project.**

In the event no information columns are specified in either the company’s Default Respondent Columns page or the projects Set Default CAPI Columns page, then after synchronization the Confirmit console will display the “system default” columns. These are; ID, Interview Start Time, Interview End Time, Status, Description Respondent Source and Deletion Status. The console will therefore never display a respondent list with no information columns.

#### 4.8.5.1. How to Set Up the Company Default

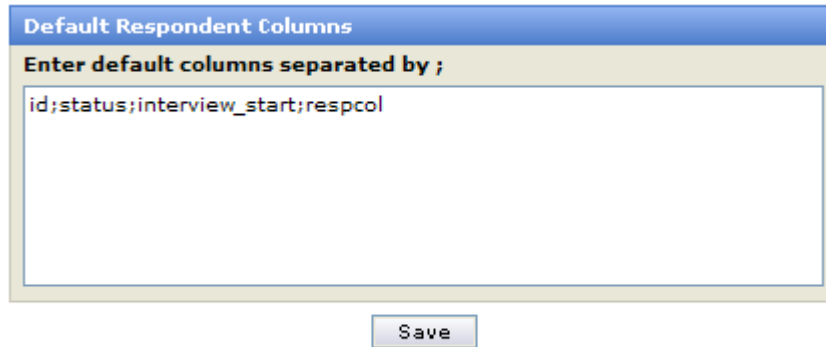
1. Go to the **CAPI/Kiosk > Default Respondent Columns** menu command.

The Default Respondent Columns page opens. Here you can enter a list of columns that you wish to be displayed as default in the company’s CAPI consoles.



*Figure 60 The Default Respondent Columns page*

2. Type into the field the columns you wish to be displayed as default, separated by the ; character (see the figure below for an example), and click **Save**.
3. While typing in the column names, the following points must be noted:
  - o The column names are not case-sensitive.
  - o To specify the “Interview start time”, type in **interview\_start**.
  - o To specify the “Interview end time”, type in **interview\_end**.



The specified columns have been successfully saved

Figure 61 Example of a list of default columns

The company default setting is now defined, and this will be exported to the individual CAPI consoles the next time the consoles are synchronized. You can go into individual projects and override the company default setting if required.

**4.8.5.2. How to Change the Default for a Specific Project**

1. Go to the **CAPI/Kiosk > Sample Management** menu command.
2. In the Assign Respondents window, click on the radio button for the required survey to select it, then right-click on the survey and select **Set Default Columns** from the menu.

The Set Default CAPI Columns for Project page opens.

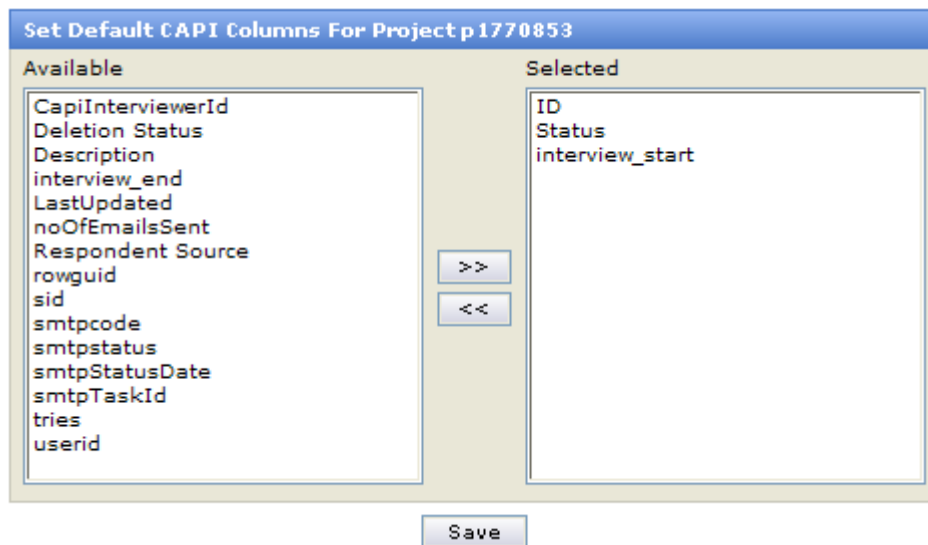


Figure 62 Example of the Set Default CAPI Columns for Project page

This page lists the available columns and those you have specified to appear as default (earlier in the procedure). Note that if you have specified columns that do not exist in the survey, then those columns will not appear in the Selected list.

If required, at any time you can override the default selection you have made, by adding or removing columns from the default set. To do so:

3. In the Available list, using standard Windows techniques, select the column or columns you wish to include as default.
4. Click the >> button to move them to the Selected list.
5. If you wish to remove columns from the Selected list, select them in this list and click the << button.
6. Click **Save** to save the changes.

**Note: If you change the default column setup for an individual project by going to the Set Default CAPI Columns... page as described here, then that project will no longer be influenced by the setup in the Default Respondent Column page. I.e. Any later changes to the Default Respondent Column page will not be applied to this project.**

The default column setup for the project is complete. The CAPI interviewer console(s) must now be synchronized to reflect the changes (see How to Synchronize on page 52 for more information). Note that the console user (the interviewer) can also change the setup on their console if required (see Changing the Information Columns on page 58 for more information)

## 4.9. The File Library

The File Library is an area in Confirmit that is allocated to the users/interviewers, in which files can be stored. This area can be used to transfer files to and from the interviewer consoles (see Files in CAPI Surveys on page 17 for more information).

If files stored in the File Library are to be transferred to the consoles during synchronization, then the files must be stored as described later in this section. If a file is deleted from the File Library, then that file will also be deleted from the consoles during the next synchronization.

**Note: Each company is allocated its own File Library area, and a company's File Library can be accessed by all users within the company. This means that if there are several Confirmit authors in a company, then all of them will have access to all files stored in the File Library by any of the other users. Confirmit Company therefore strongly recommends that to simplify navigation and file location, each user creates his/her own folder in the library, in which to store their files.**

The supervisor can synchronize/transfer File Library files for a specific interviewer.

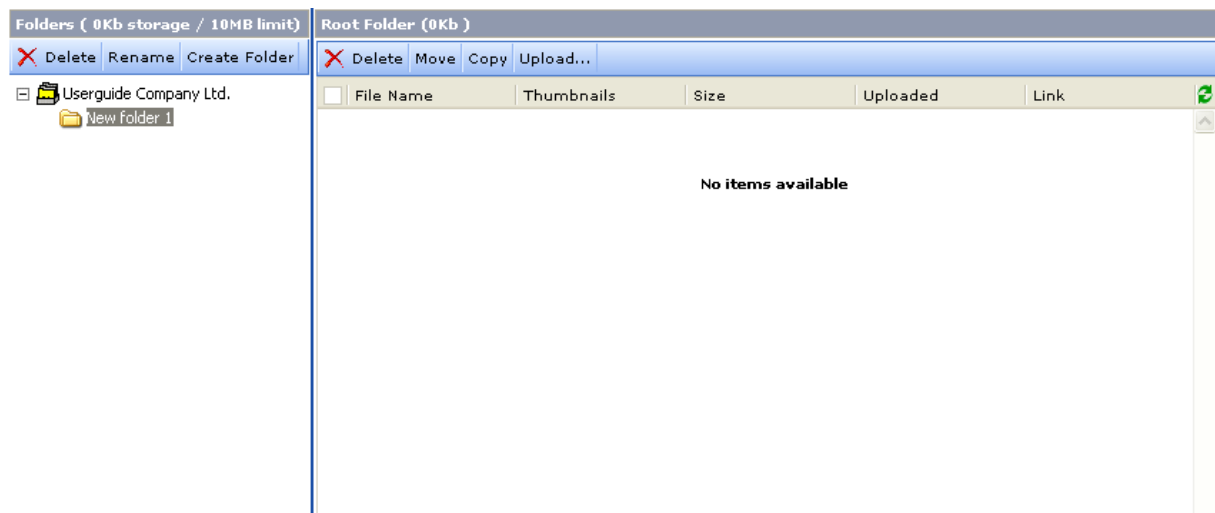
**Note: During synchronization, the interviewer is checked to establish whether he/she is in the same company as the survey, and if not, the capicommon and pxxx folders (if any) in the company file library are downloaded to the console.**

### 4.9.1. How to Transfer Files to a Specific Interviewer Console

**Note: You must have System\_File\_library\_Access permission to transfer files.**

1. Log on to Confirmit as the supervisor.
2. Go to the **Home > File Library** menu command.

The File Library window opens.



*Figure 63 The File Library window*

3. If necessary, create a new folder in the File Library for the interviewer, into which the files are to be uploaded.

4. In the Folders column, click **Create Folder**. A new folder is created under the company folder.
5. Name this folder CAPI + the interviewer ID, for example "CAPI\_adamapple".
6. Click on the new folder to select it, and in the Root Folder column, click **Upload**.  
The Upload Files pane opens in the lower part of the screen.
7. Browse to and select the files you wish to upload (note that you can upload up to five files at one time), then click **Upload Files**.  
The Files are copied into the selected folder.
8. Log on to the CAPI Console using the appropriate user name, and synchronize (see How to Synchronize on page 52 for more information).  
The files are transferred to the console on which the interviewer ID is installed.

After synchronizing the console, go to the appropriate folder in the console pc as follows:

Under Windows XP - **C:\Documents and Settings\All Users\Application Data\Confirmit\web\isa**

Under Windows Vista / Windows 7 - **C:\ProgramData\Confirmit\web\isa**

This folder will now contain a folder with the CAPI interviewer name. This folder will contain all the files that were in the File Library at the time of synchronization, and these files are now accessible to the interviewer.

## 5. The Interviewer Console

The Interviewer Console is a Winform application in which the interviewer conducts the surveys, usually offline. The application is usually installed on standard offline Tablet PCs or other Windows-based devices. It gives access to Confirmit surveys that are deployed by a CAPI supervisor and assigned to an interviewer. It provides full control of these surveys (start, stop, cancel and restart interviews), and access to the messaging system for communication with the supervisors. The interviewer console offers a secure login-based interface and secure and encrypted storage of response data. The current version of the CAPI Console application that is installed in the console is shown in the **Help > About** menu.

**Note:** You can install the CAPI Console onto as many laptops as you wish. However the number of CAPI Consoles that can be active at one time is restricted by the number of stations licensed. For example, if your company has licensed 10 CAPI Consoles, and installs the CAPI Console onto 12 laptops, all 12 consoles can be used but only 10 consoles can be activated by the interviewers at one time. When the 11<sup>th</sup> interviewer attempts to log on to their Console, the interviewer will receive an error message stating that the allowed number of licensed CAPI Consoles has been exceeded.

### 5.1. How to Enter the Console

1. Launch the console either from the **Start** menu or the desktop depending on where the link to the application is stored.

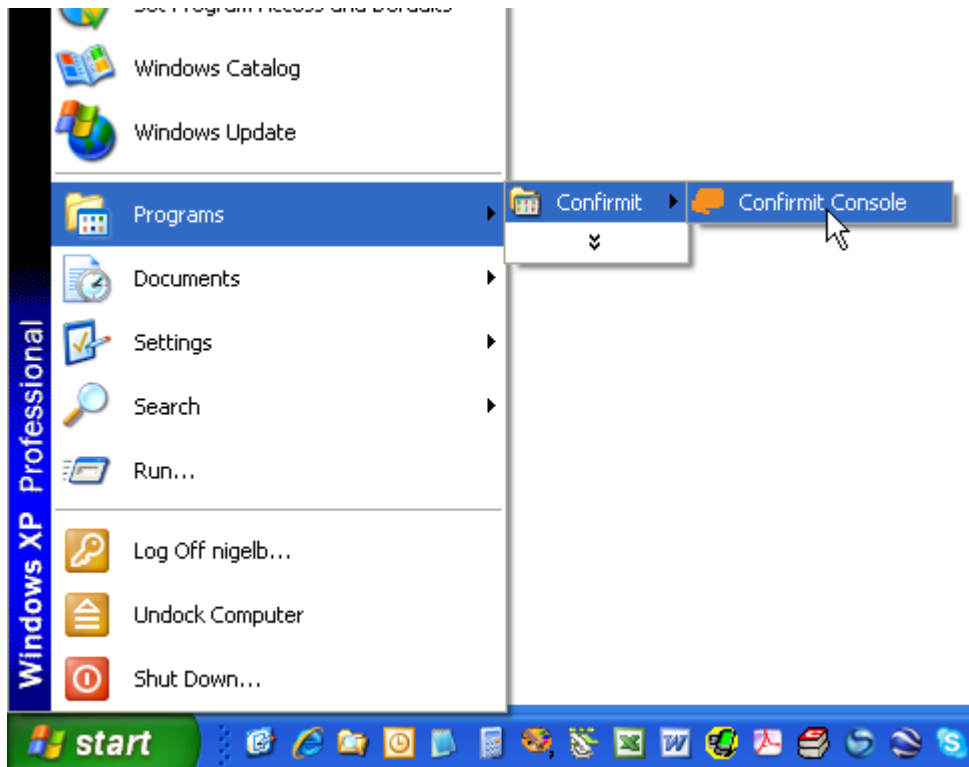


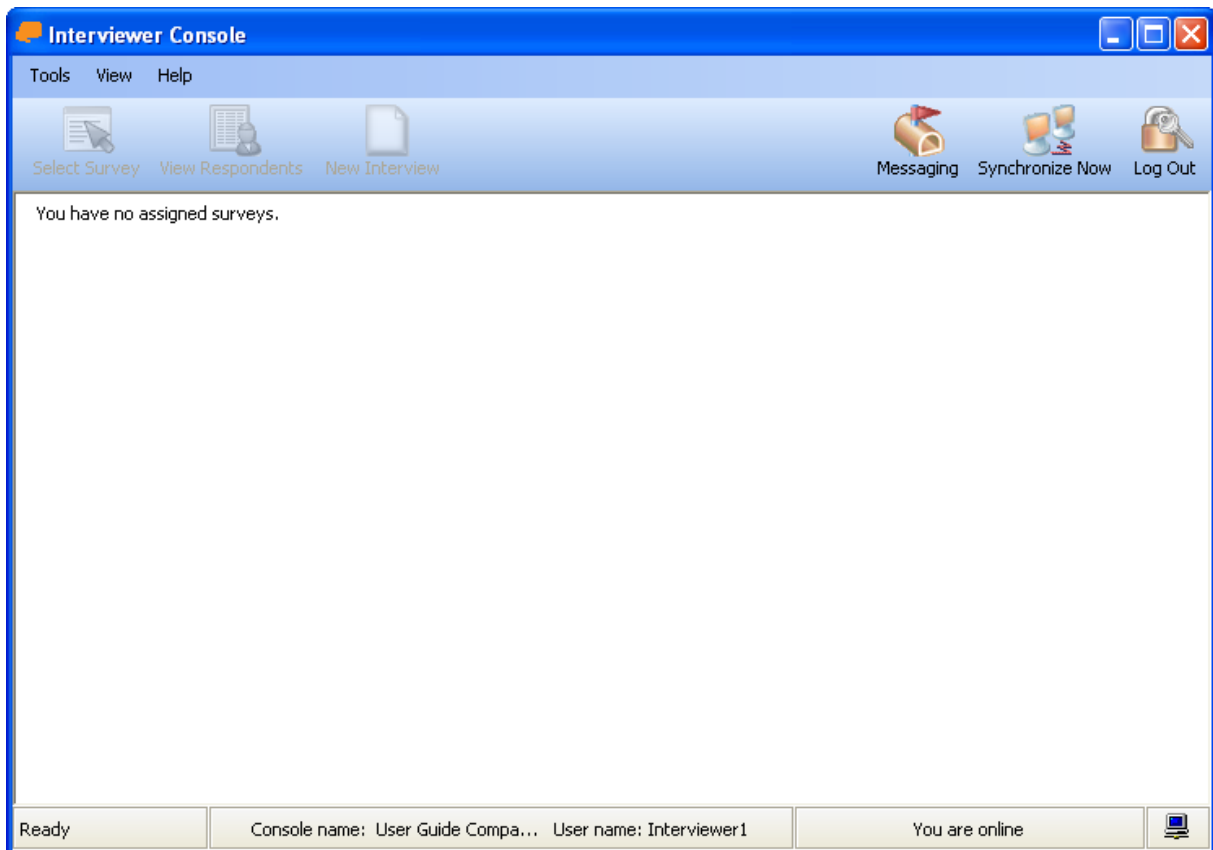
Figure 64 Entering the Console

The console Login page opens.

**Note:** If you are online and if a new version of the console application is available on the centralized server, the download process for the new version will start automatically. The system will ask you if you would like to download the new version. When the application has been launched, you must log in.

2. Type your UserID and Password into the appropriate fields and click **Login**.

The Interviewer Console window opens. If this is the first time you are logging in to the console, the screen will display a message informing you that you do not have any assigned surveys.



**Figure 65 Example of the console window for an interviewer**

The information bar across the bottom of the window displays the console name and to which company the interviewer is attached, which user is currently logged on to the console(see Interviewer Lists on page 5 for more information), and whether or not you are online. If you are not online, the last time you were is displayed.

## 5.2. How to Synchronize

1. Check that you are Online.
2. Click the **Synchronize Now** button in the upper right corner of the window.

The console starts the synchronization process towards the central server. The Synchronization Log window opens, and any surveys that have been assigned to you and any messages that the CAPI supervisors may have sent will be downloaded to your console.

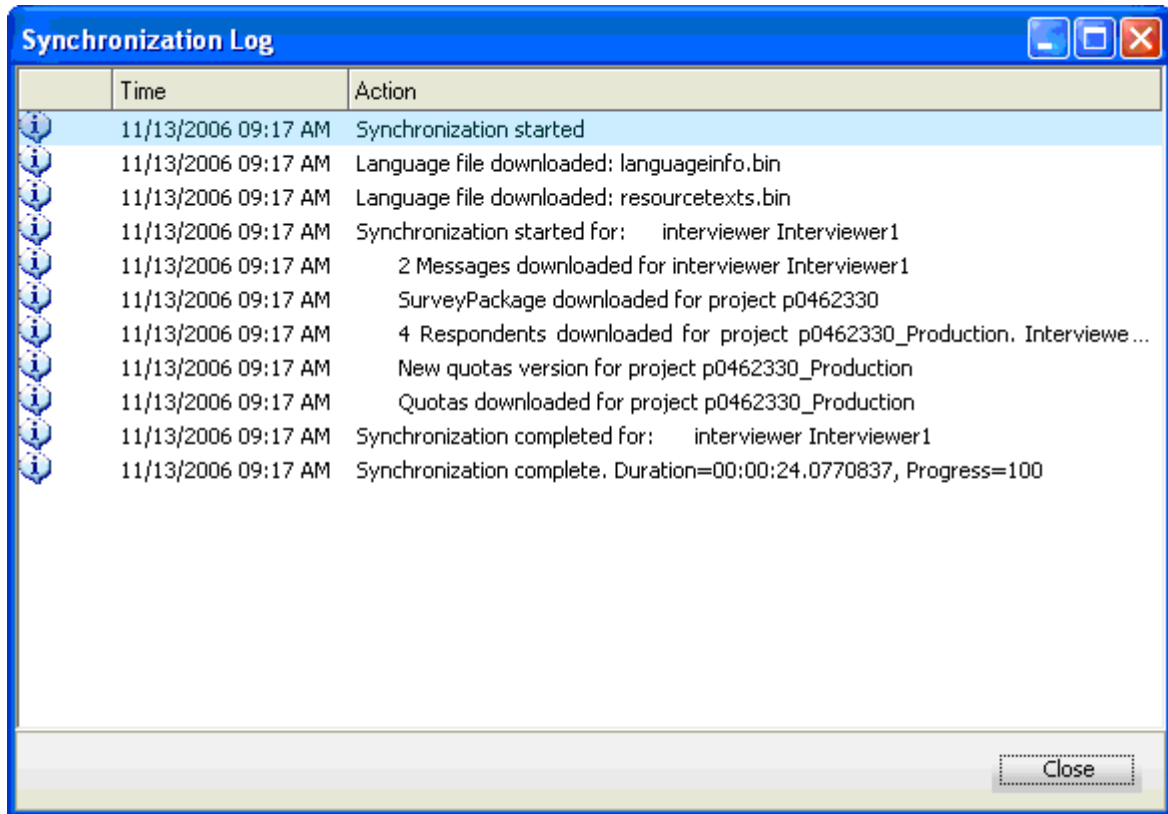


Figure 66 Example of the Synchronization Log window

A progress bar is displayed in the left end of the Information bar. After synchronization, if you have any new messages/emails, an icon indicating this is displayed towards the right end of the bar.

When synchronization is finished, any surveys that are assigned to you will be displayed in the console.

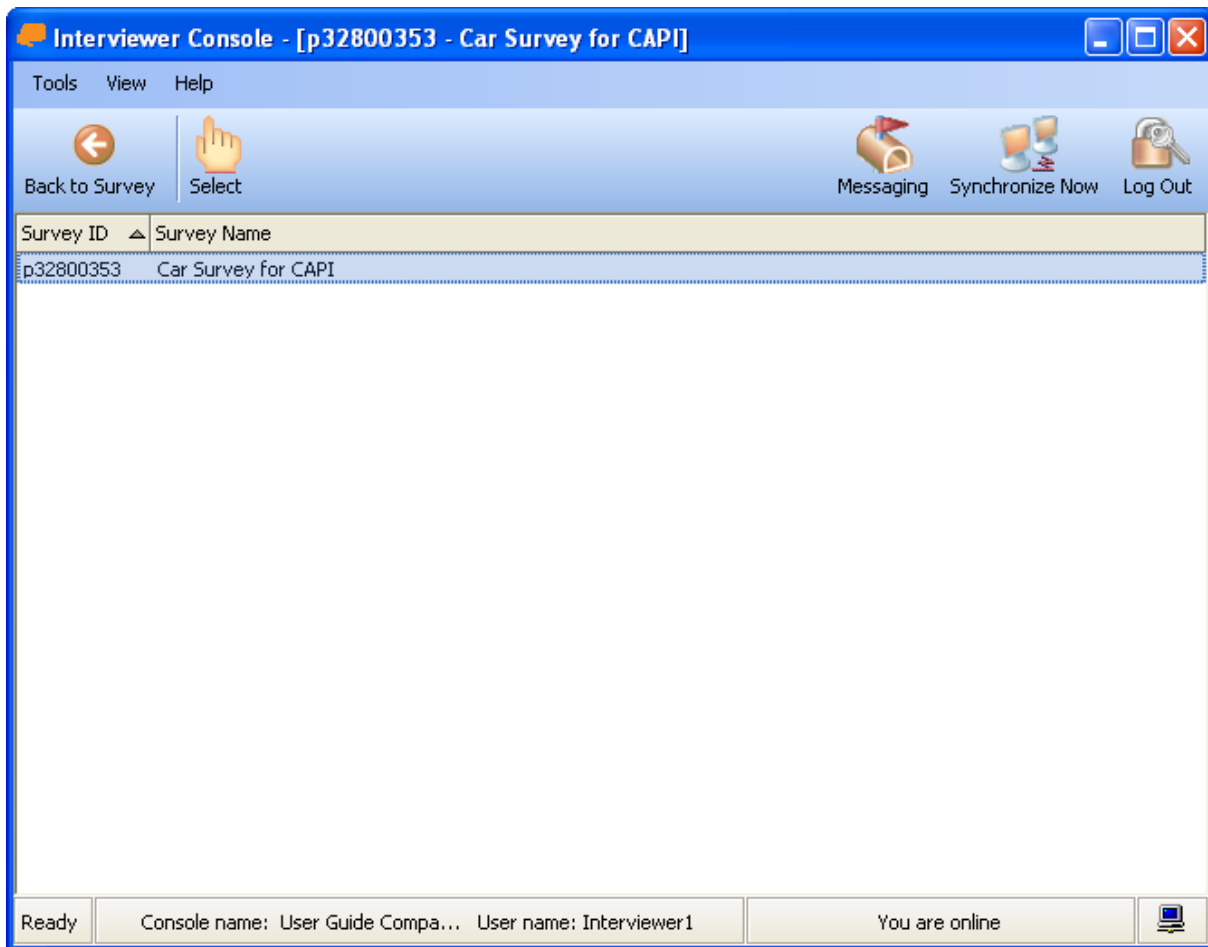


Figure 67 After Synchronization

### 5.3. How to Select a Survey

When you have performed the synchronization, are offline and ready to conduct the interviews, you can select and activate the appropriate survey.

To activate a survey, highlight the survey in the list and click **Select** (or press **Ctrl+Shift+S** on your keyboard), or double-click on the Survey ID.

The Survey opens on the console and you are ready to go.

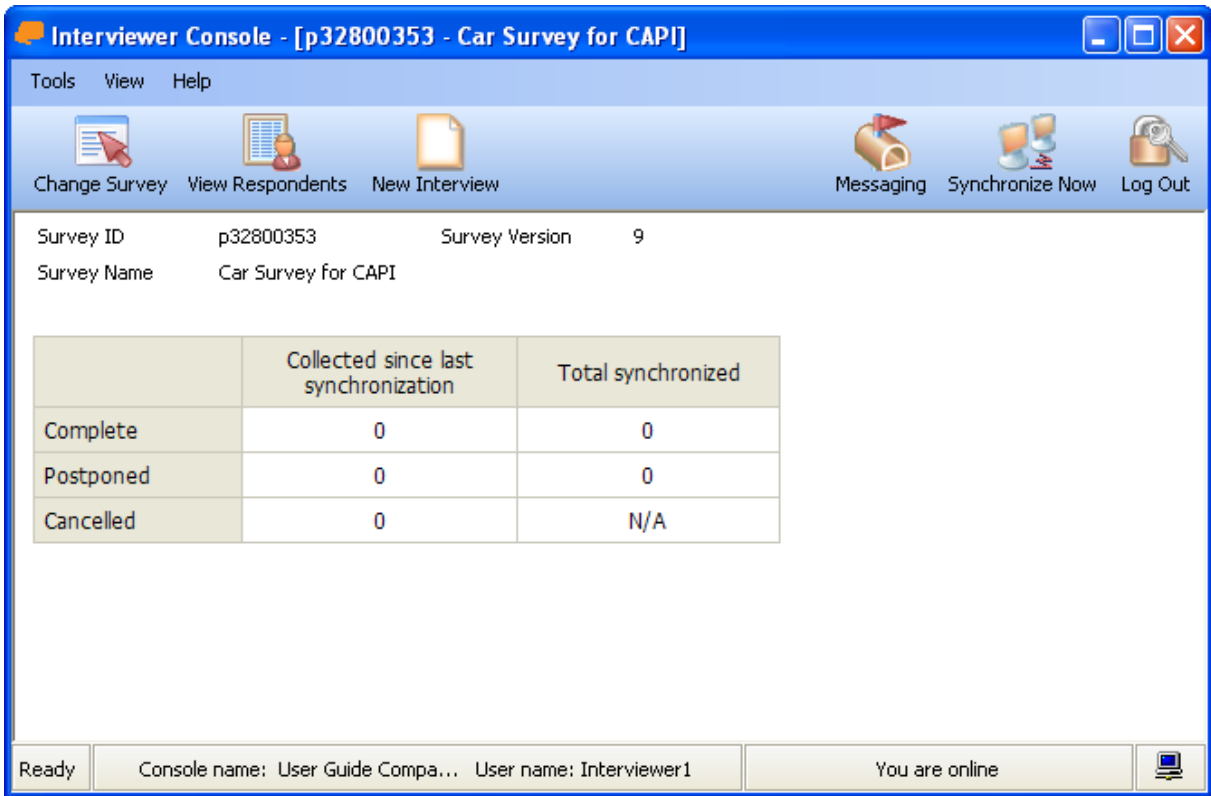


Figure 68 The Survey ready for use

## 5.4. Messaging

**Note: Messaging is not supported on the CAPI app.**

Before you start to interview respondents, you may wish to check for new messages in case there are instructions relating to the current interview.

1. Click the **Messaging** button.  
The console’s messaging system opens.

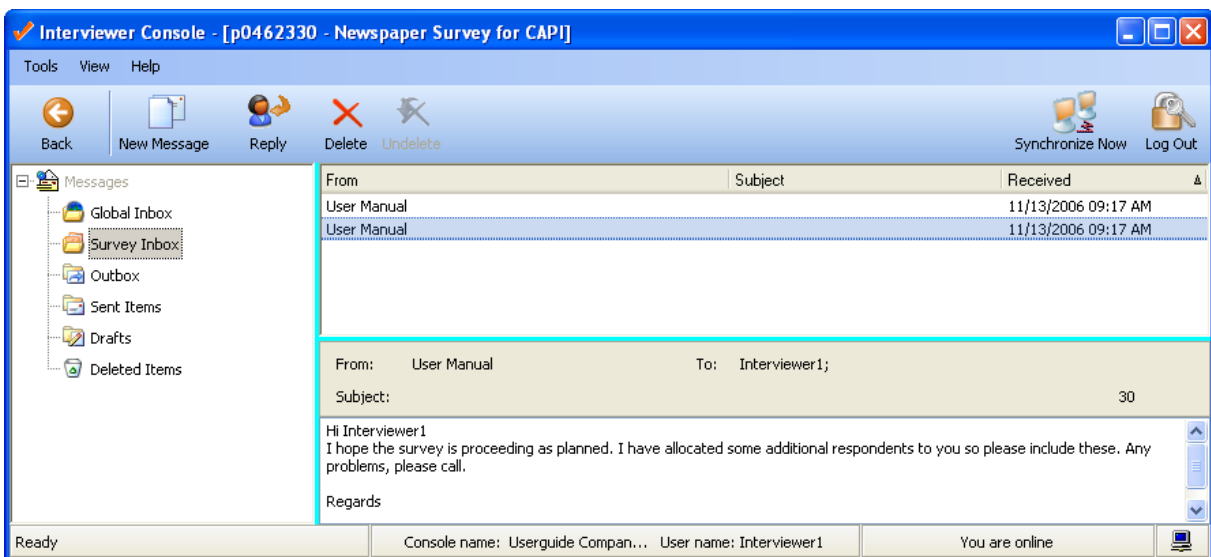


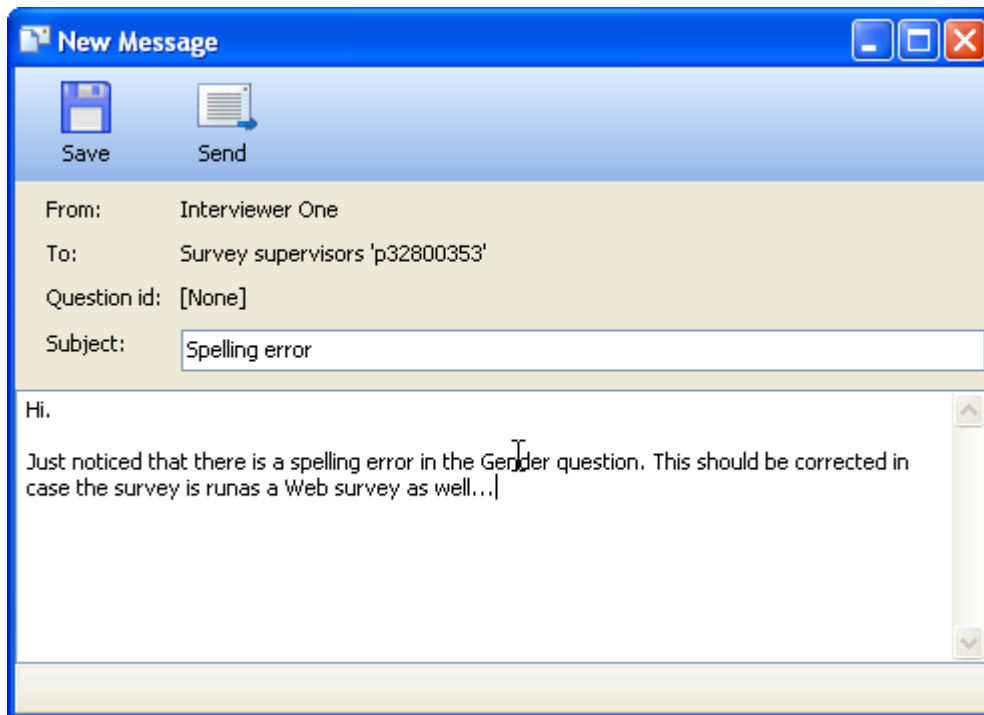
Figure 69 Messages

The messaging system in the console functions as most other basic email systems, with a folder hierarchy in the left frame and messages listed to the right.

- o The Global Messages folder contains any messages that are sent to all interviewers from the CAPI Supervisors Global Messages folder.
- o Any survey-specific messages will be gathered in the Survey Inbox.

When you open a message, as in the example above, the top bar of the message frame displays the name of the supervisor who sent the message, the subject of the message, to whom it was sent, which survey the message concerns, and the question ID of the question the message concerns (if appropriate).

**Note: You can only send messages to the CAPI supervisors. The message will be sent to all supervisors of a survey.**



*Figure 70 Example of the New Message window*

2. While you are writing a message, click **Save** periodically to save the message in the Drafts folder.
3. When the message is complete, click **Send** to send the message to the Outbox folder. The next time you are online and you run the synchronization process, the message will be sent to the supervisors.

To close the Messaging system and return to the Survey screen, click **Back**.

## 5.5. Conducting Interviews

When you select a survey, the survey information page opens.

- **Survey ID** – displays the Confirmit project ID.
- **Survey name** – displays the title or name of the survey.
- **Survey Version** – the version of the selected survey.

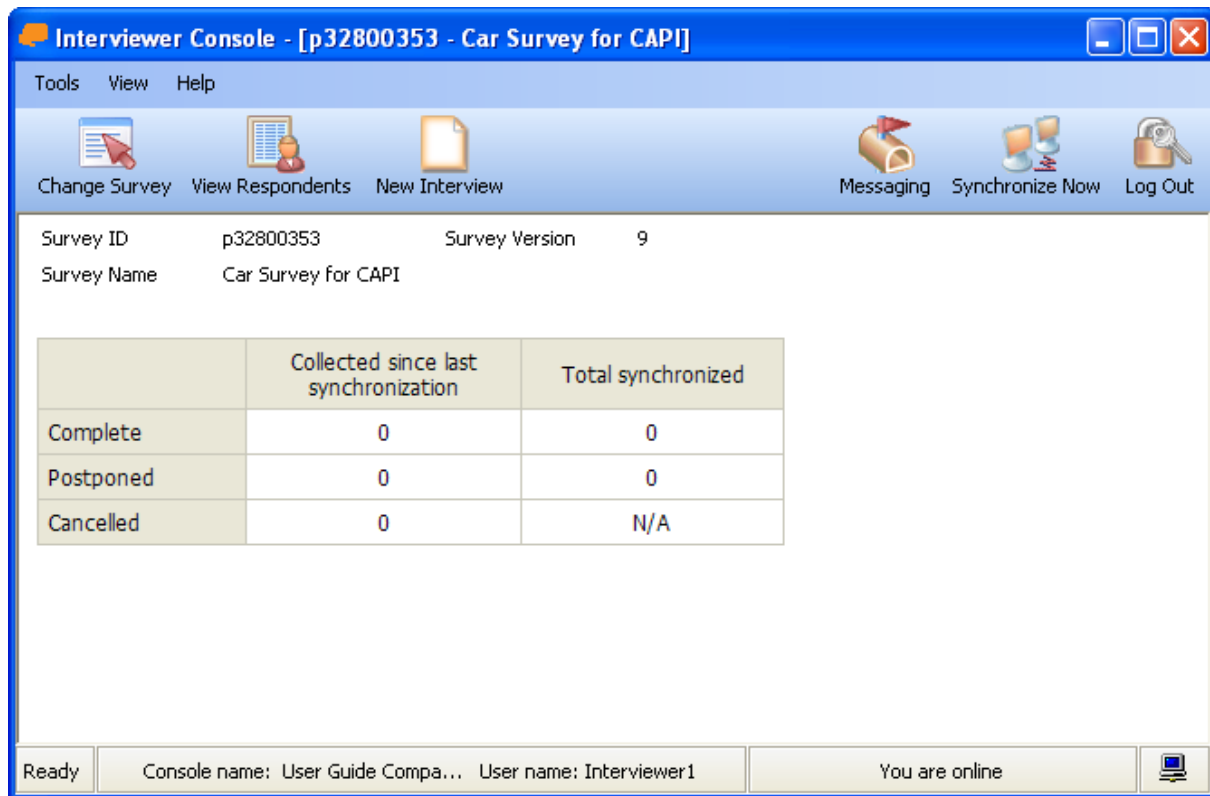


Figure 71 Example of the Survey Information page

If you wish to change the survey at this point, click the **Change Survey** button to reopen the survey list page.

### 5.5.1. How to View Respondents

The survey you are about to conduct may be targeted towards specific respondents. To check whether you must contact named respondents, click **View Respondents**. A list of any respondents who have been uploaded to the survey and assigned to you, opens.

In the example below, four respondents are assigned to the interviewer.

The respondents' details are displayed as columns of information (the figure below shows the respondent ID (respid in Confirmit), Description, Interview Duration, Respondent Source and Status columns). The columns that are displayed here by default are specified by the supervisor for each survey (see Default Respondent Data Columns on page 47 for more information), and are transferred to the console during synchronization. However these can be changed by the interviewer (see Changing the Information Columns on page 58 for more information). The Interview Duration column records the time the particular respondent used to reply to the interview. The Status column displays the interview status: Complete, Incomplete or Not started.

The Respondent Source column indicates how the respondents were added to the console:

- **Server** – indicates that the respondents were assigned to the interviewer from Confirmit.
- **Console** – indicates that the respondent was added via the console by starting a new survey.

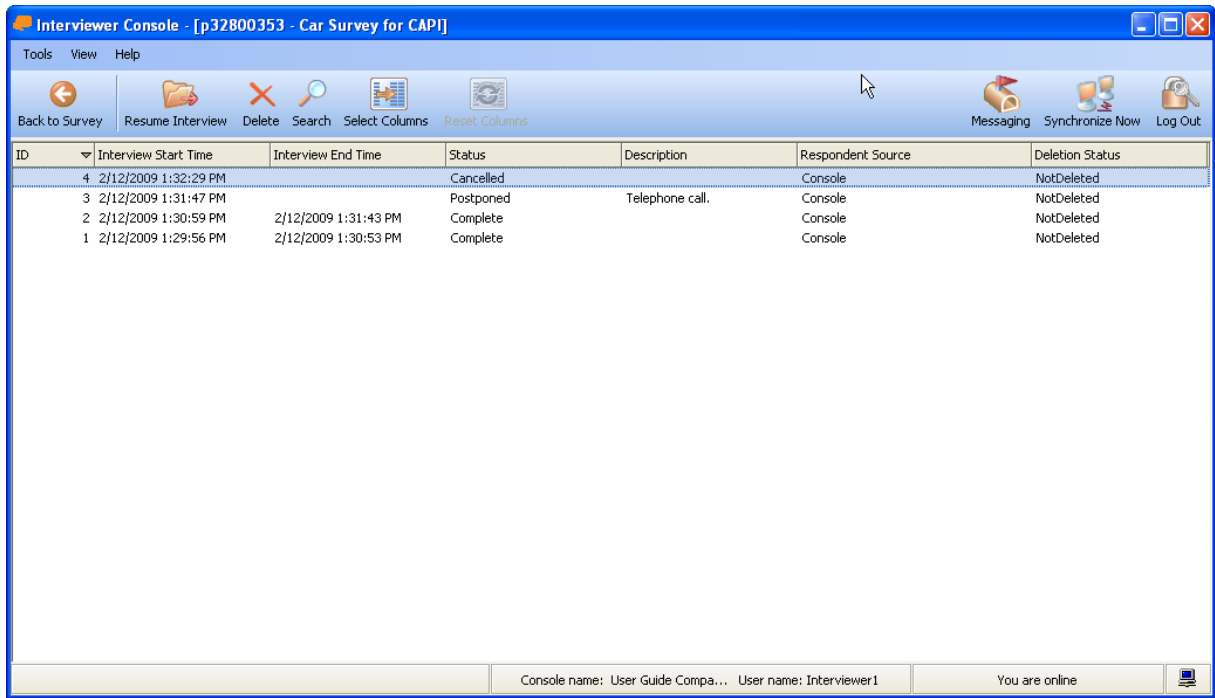


Figure 72 Example of the View Respondents window

### 5.5.2. Changing the Information Columns

The default respondent information columns displayed when you click the **View Respondents** button are specified by the project supervisor(see Default Respondent Data Columns on page 47 for more information). However you can change the columns that are displayed as follows:

1. Click the **Select Columns** button.  
A pop-up window with an Available items and Selected items list appears.

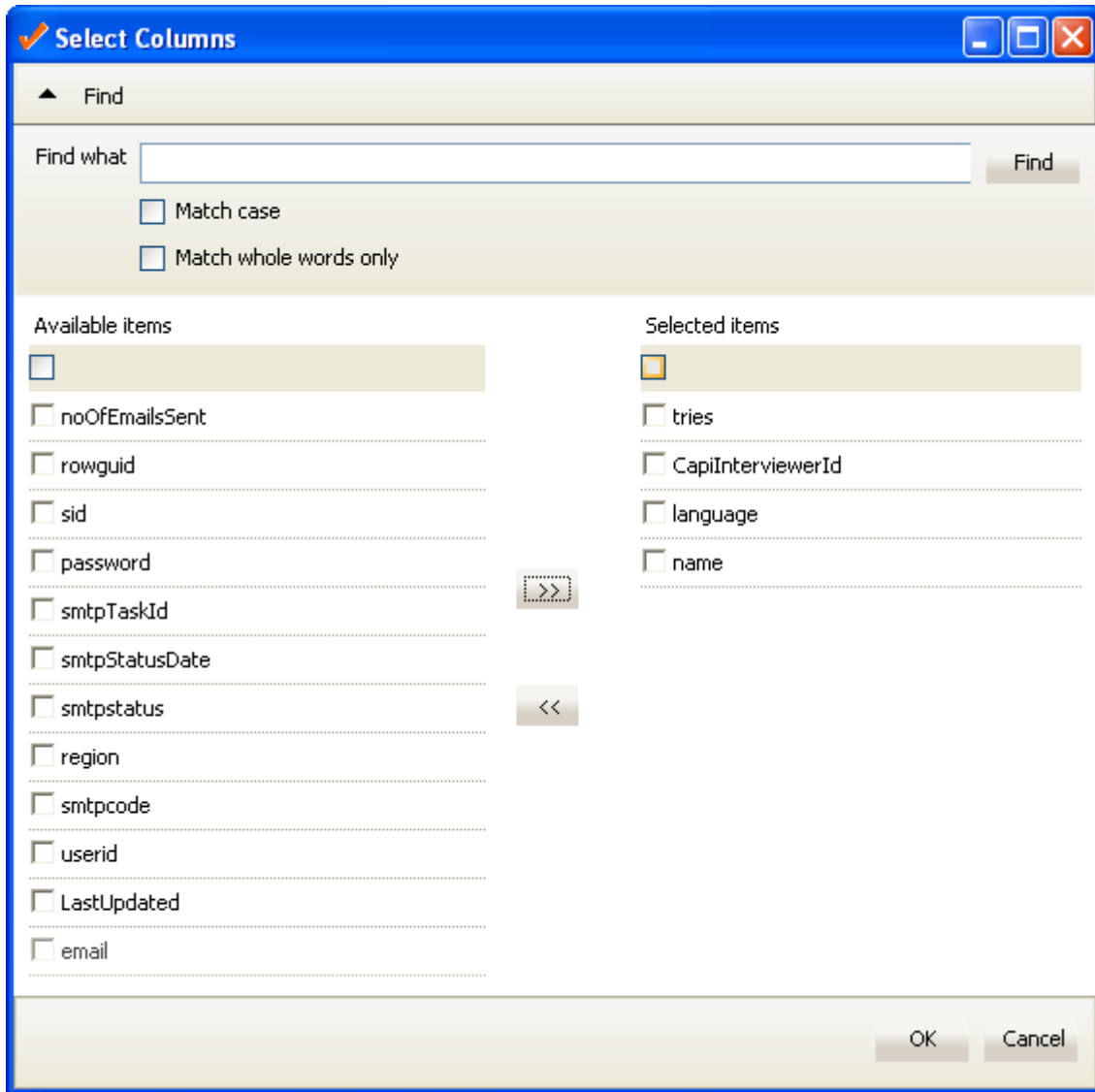


Figure 73 The Select Columns window

2. In the Available Items list, select the fields you wish to display in the View Respondents screen.
3. Click the >> button to move them across to the Selected Items list.
4. On completion, click **OK**.

To remove unwanted fields, select them in the Selected Items list and click << to return them to the Available Items list. Click **OK** to update the display.

**Note:** If you change the column setup for a project away from the default setting specified by the supervisor, then any future changes to the default setup made by the supervisor will not affect this project on this console.

### 5.5.3. Resetting the Information Columns

Once you have changed the column setup away from the default specified for the survey by the supervisor, the **Reset Columns** button becomes active. To reset the columns that are displayed to the “default”, click the button then click **OK** to confirm the reset.

### 5.5.4. How to Search for Particular Respondents

If you wish to search for a particular respondent, or for the reason why an interview was postponed:

1. Click **Search**.

Search criteria fields for the displayed columns appear.

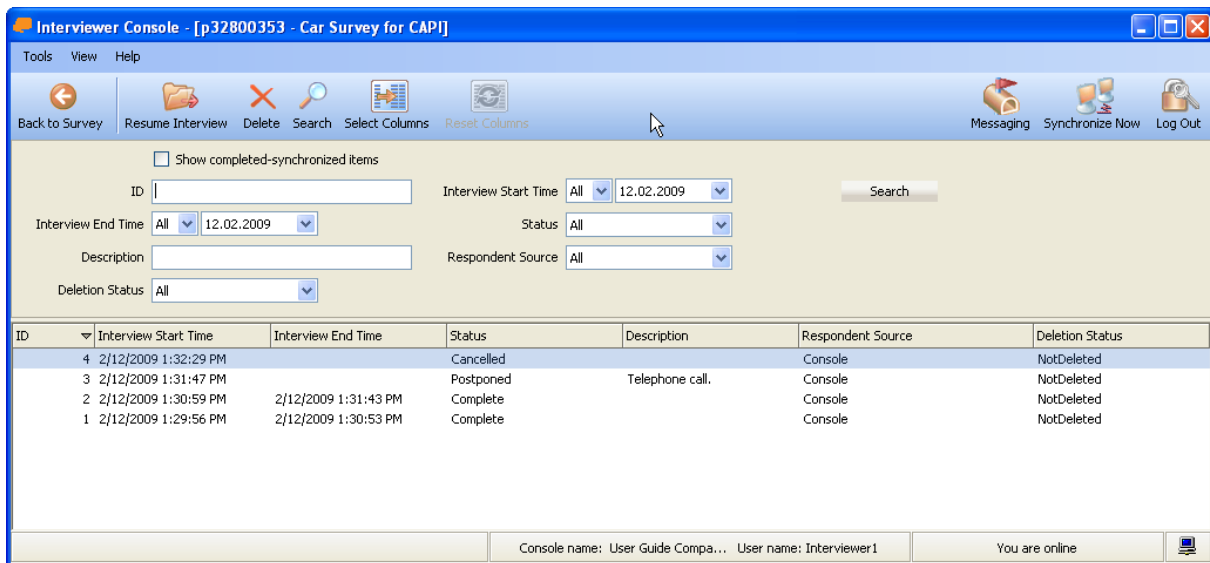


Figure 74 The Search fields

2. Make the appropriate selections and/or type search criteria into the various fields.
3. When you are ready, click **Search** to update the list.

### 5.5.5. How to Interview a Named Respondent

To start an interview for a named respondent, highlight the respondent in the list and click **Start Interview**. The survey opens, and you can start to interview the particular respondent.

Note that "Default" and "Refused" answer categories can be set for multi and single questions in CAPI. These are set up by the project designer in Confirmit Authoring (refer to the Confirmit Authoring User Guide for further information). "Default" allows the designer to select for example the answer that is expected to be the most common answer, and apply this answer to a specific button or short-cut. This can simplify and speed up the task of the interviewer. In the same way, if the respondent does not wish to answer a question, a "Refused" answer category applied to a specific button or short-cut can assist the interviewer. Normally, the **Control-R** shortcut for is used for refused answers and **Control-D** for default.

### 5.5.6. How to Conduct Open Interviews

In an open survey, where no named respondents are assigned to you, click **New Interview** to start recording a new response.

When you have finished interviewing the respondent and all the answers are collected, if the survey does not close automatically then click **OK** in the upper left corner of the display to return to the survey's Start/Home page. The page will now show that one Complete response has been collected.

Click **New Interview** again to start a new interview.

### 5.5.7. How to Stop or Postpone a Survey

Click **Cancel** at any time to cancel the interview. In open surveys, the interview will not be recorded and will not appear in the View Respondents list. In limited surveys with assigned respondents, the interview/respondent will be displayed with status **Not started**.

You can also postpone an interview. To do this, click the **Postpone** button. A pop-up window opens in which you specify the reason for postponement. This will simplify finding the respondent in the system later when the interview can be resumed.

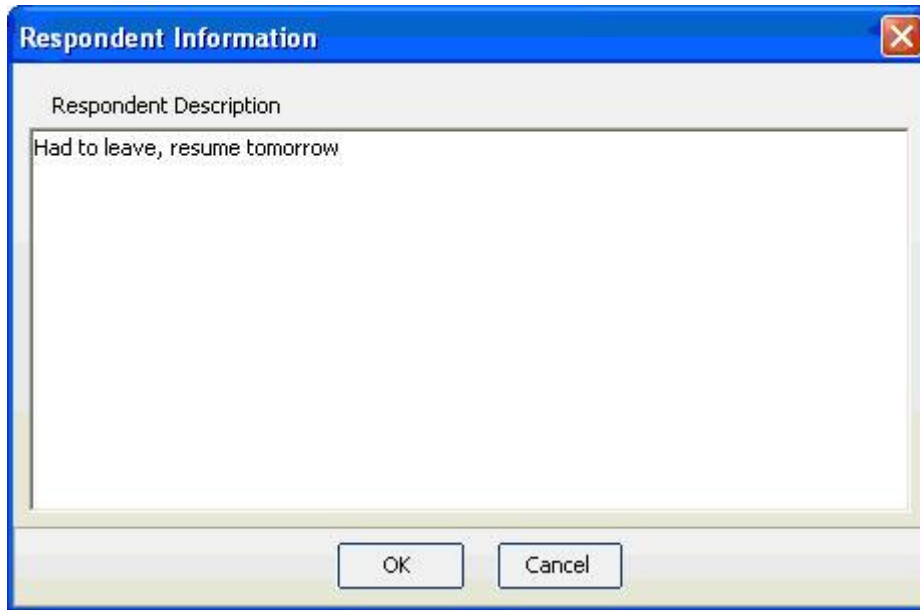


Figure 75 Example of a Postpone Interview pop-up

The interview will then go directly to the end block and the interview appear in the View Respondents list with the status Postponed.

When a survey is postponed, a **Back** button will be displayed in the end block. Click **Back** to return to the question you were at when you clicked **Postpone**.

### 5.5.8. How to Resume a Postponed Interview

To resume a postponed interview, go to the View Respondents list, find and highlight the respondent and click **Resume Interview**. Depending on how the survey has been launched, the interview will open at the first unanswered question. See the Confirmit Authoring User Guide for more details on survey settings.

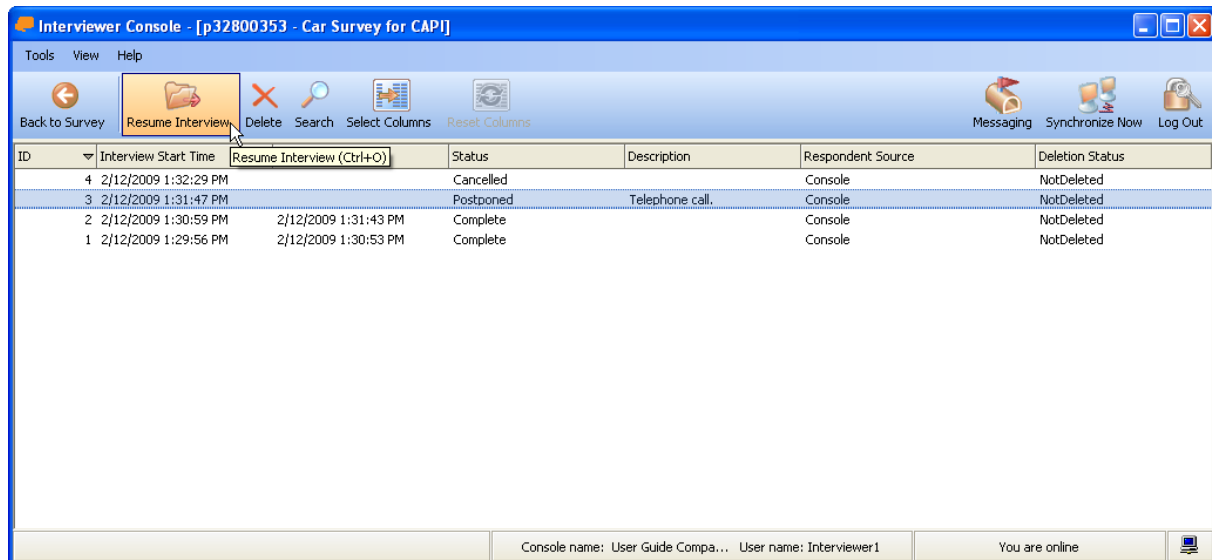


Figure 76 Resuming a postponed interview

The Interview Duration column displays the Interview start and end times. For postponed interviews, the Interview start time will be the start time of the first interview attempt.

### 5.5.9. How to Open a Completed Interview

If you highlight a respondent who has the status Complete, the **Open Interview** button appears. If the survey has been launched with the appropriate survey setting, you can now reopen the interview and change the answers. See the Confirmit Authoring User Guide for more details on survey settings.

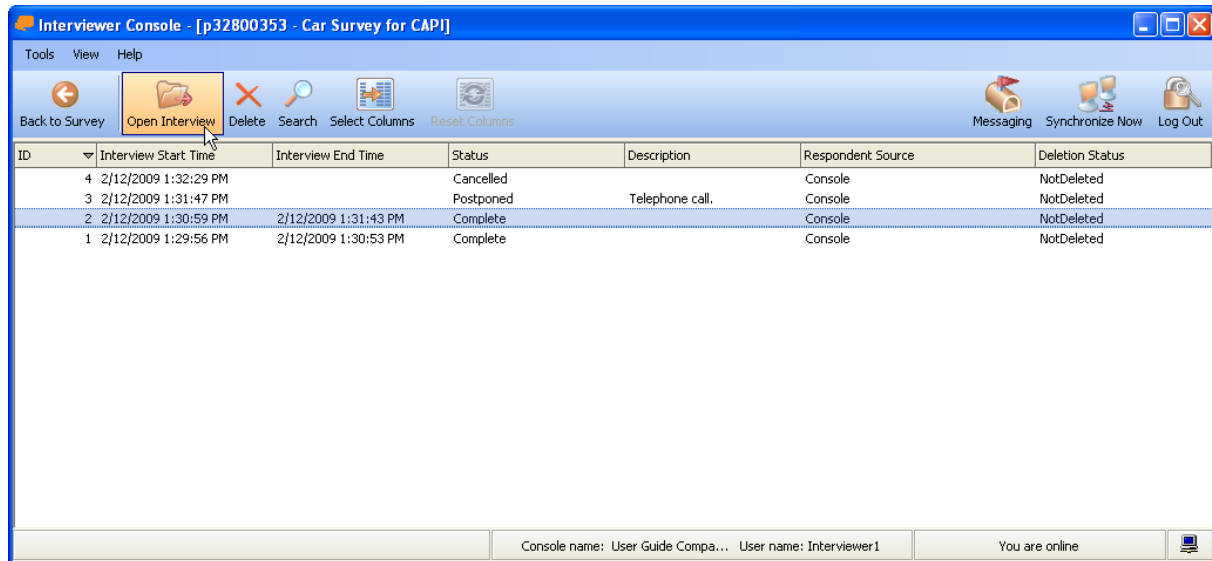


Figure 77 Reopening a completed survey

### 5.5.10. Surveys with Quotas

If some quotas are defined for specific groups of respondents, the quota settings that have been assigned to the current interviewer will be displayed on the main page for each survey. Refer to the Confirmit Authoring Manual for more details on quotas.

The interviewer in the example is to collect complete interviews for the “Follow-up TV Case” survey from 30 female respondents and 30 male respondents.

When the completed surveys are registered, the Quota Information table will be updated. The number of collected interviews is displayed in red beside the required number.

Quota Information	
Gender	
Male	0/30
Female	5/30
Total	60

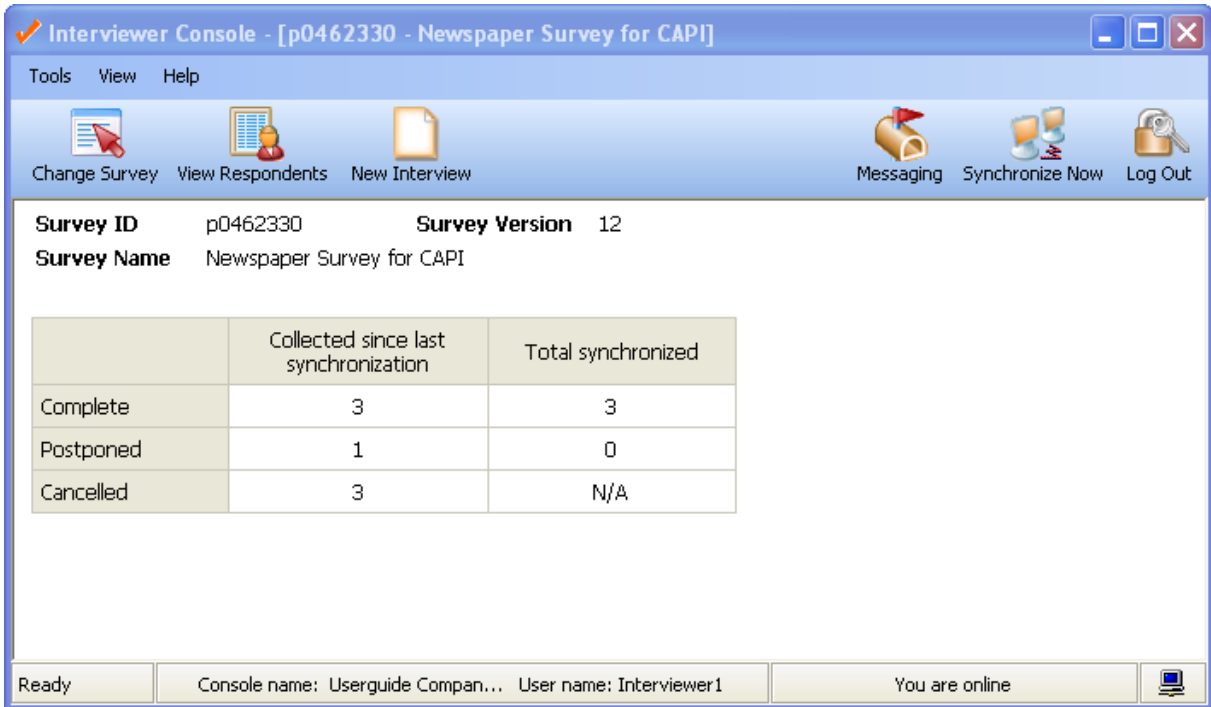
Figure 78 The Quota Information table is updated

## 5.6. Synchronization

When you have finished the interviewing job, you must transfer the data to the server. To do this you must first connect the console to the Internet. The interviewer in the example has collected four complete responses (specified in the Collected since last synchronization field).

**Note: If you do not synchronize before logging off, then any data you have collected will remain in the console. To retrieve this data, you must log on to the survey and synchronize the console so that the data is transferred to the server.**

**Note: The time setting in the console must be synchronized with the time setting in the server. If the times are not synchronized correctly, an error message will be displayed.**



**Figure 79 Completed interviews not yet transferred**

1. Connect the console to the Internet.
2. Click the **Synchronize Now** button.

The responses are zipped (to reduce the size of the transmitted file) and sent to Confirmit's central server. Here the data is un-zipped and processed.

When the synchronization process is complete, the Complete interviews will be registered in the Total Synchronized field along with any that were registered previously. This field shows the total number of responses sent.

**Note: In the event the respondent/response data file cannot be read for any reason, an error is written into the synchronization log, a bug report is sent, and the synchronization task is continued.**

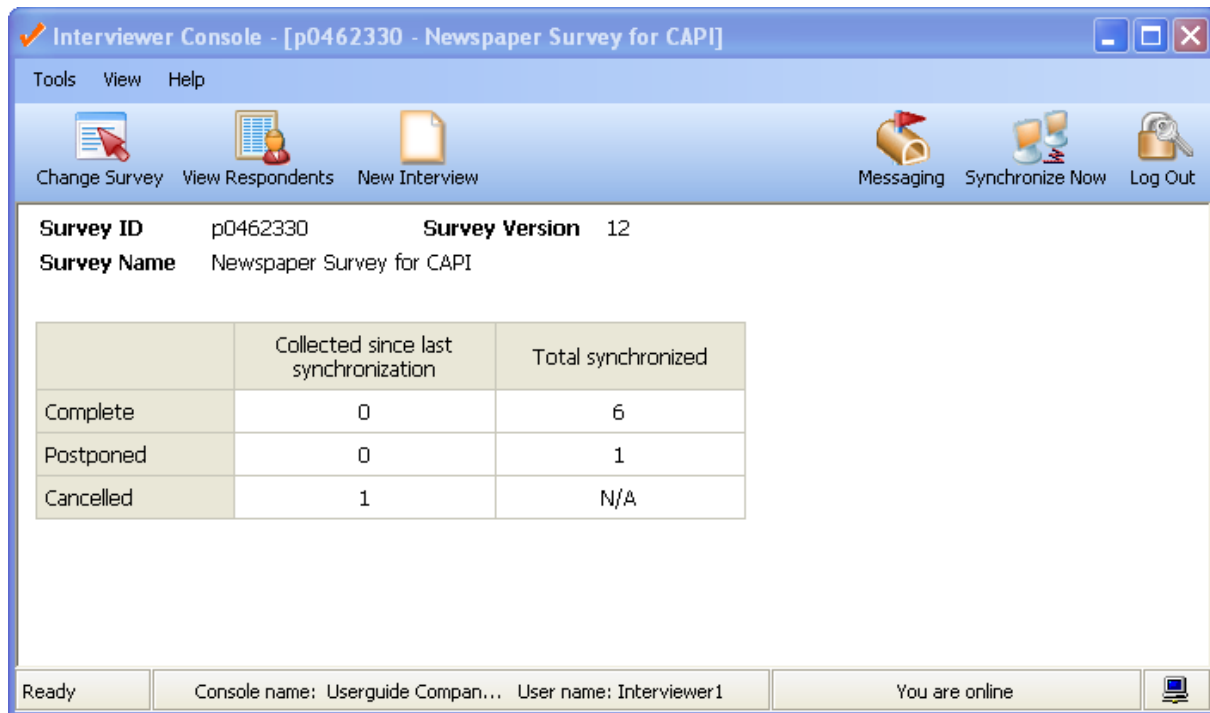


Figure 80 The complete interviews are now transferred

In this example, if the **View Respondents** button was clicked now the list would be empty.

When you next log on to the console, it will open the survey information page for the last interview that was active on the console.

### 5.6.1. How to Set the Synchronization Schedule

You can set up Synchronization to run automatically at predefined times, by adjusting the Synchronization Schedule Settings on the console. This can be useful if the pc is normally connected to a docking station when not in use.

**Note: The ability to schedule synchronization is not supported by the CAPI app.**

1. Go to the **Tools > Synchronization Schedule Setting** menu command.
2. Check the **Enable Schedule** box.
3. Make the required settings.

The Synchronization Schedule Settings page opens. Here you can define when synchronization is to be performed.

- o **Schedule Type** – select Hourly, Daily, Weekly, or Monthly. The other options available depend on the Schedule Type selected.
- o **Start by and End by** – define when the synchronization operation is to start and end. Depending on the Schedule Type selected, you can also define how often synchronization is to run, for example every 4 hours, every 3 days etc.
- o **Spread** – use to define when the next console in line is to start synchronizing.
- o **Apply this change to all consoles on the list** – on saving, the new schedule will be applied to all consoles listed in the Activated Consoles list, including those that were not selected.

4. Click **OK** to save the settings and close the window.

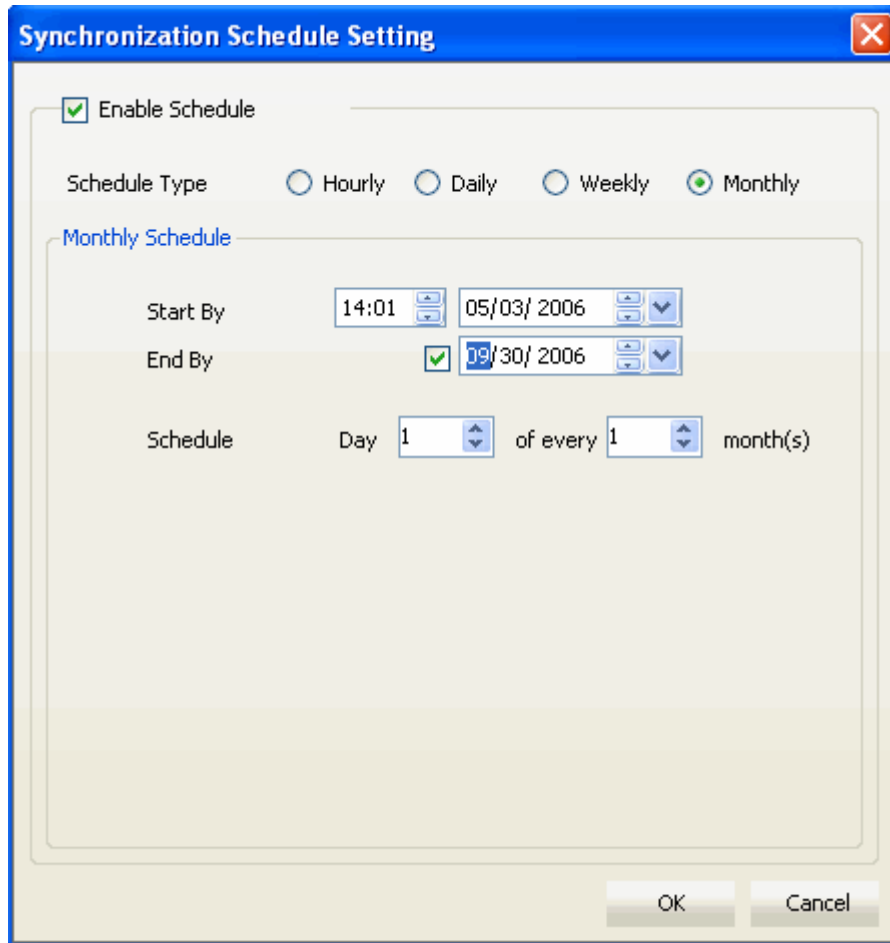


Figure 81 Synchronization Schedule Settings In Console

**Note: The console must be online for synchronization to be performed.**

### 5.6.2. How to Test the Survey

You can test the survey before you start to gather “real” data, without adding the answers from your test to the database.

1. Go to the **Tools > Test Survey** menu command.  
A warning message appears informing you that no data will be saved.
2. Click **OK** to continue.  
The Questionnaire opens.
3. Work your way through the survey, answering the questions as you would for a genuine respondent.  
The survey will function exactly as it will when you input the answers given by the respondents, with all survey logic being taken into account. On completion, you will be returned to the survey home page.

**Note: Your answers will not be added to the database.**

### 5.7. Console Settings

You can adjust some of the console settings.

1. Go to the **Tools > Settings** menu command.  
The Settings dialog opens.

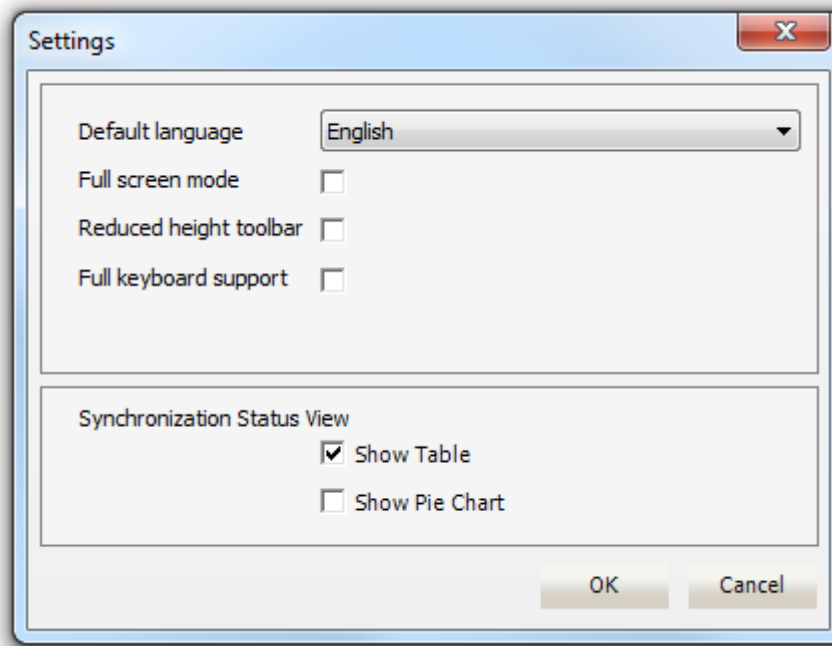


Figure 82 Adjusting the console settings

The properties are as follows:

- **Default Language** - choose the default language in which the survey is to be displayed (for multilingual surveys), click the down-arrow beside the field and select the desired language.
  - **Full screen mode**- check the box if you wish to remove the browser window and frame to leave more space for the survey screen.
  - **Reduced height toolbar** – check this box to reduce the height of the toolbar and the size of the tool icons, thereby leaving more space for the survey screen. Note that this is a console setting not a survey setting, so the toolbar will be reduced for all users.
  - **Full keyboard support** – check this box if you wish to allow input of survey answers via the keyboard. Note that this is a console setting not a survey setting, so the keyboard will be activated for all users (see Using the Console Keyboard on page 66 for more information).
  - In the **Synchronization Status** View area, choose whether the interview statistics are to be displayed as a table, as a chart, or both. In the figure above, both display options are shown.
2. Once you have made the required adjustments, click **OK** to save the changes and close the dialog.

### 5.7.1. Using the Console Keyboard

The CAPI console allows the interviewers to input answers via the keyboard. This functionality is controlled by selecting the **Full Keyboard Support** property in the Settings dialog (see Console Settings on page 65 for more information). Note that this is a “Console” function – the setting applies for all projects run from the console. The keyboard entry comprises two components:

- An input area towards the lower-left area of the console for text input.
- Inline markup/highlighting of the interview page to show the active question (a red line to the left of the question).

By default, the first question on the page is always highlighted. The keyboard sequences available are:

- **Up, Shift Tab** - highlights the previous question on the page.
- **Down, Tab** - highlights the next question on the page.
- **Left, PgUp** - goes to previous page (the same occurs if you click the **Previous** button).
- **Right, PgDown** - goes to next page (the same occurs if you click the **Next** button).

- **Home** - highlights the first sub question (if one exists) of the current question.
- **End** - highlights the last sub question (if one exists) of the current question.
- **Ctrl + Home** - highlights the first sub question (if one exists) of the first question on the page.
- **Ctrl + End** - highlights the last sub question (if one exists) of the last question on the page.
- **Esc** when TextArea or Input textbox of current question is focus - focus changes to InputAnswerQuestion textbox.
- **F2** when current question is open question - focus moves to TextArea or Input textbox of current question.

The **Enter** key is the submission key. Press **Enter** to submit the current text. Press **Enter** again to submit the question.

Question type-specific functionality:

- **Multi questions** - the keyboard entry text box will accept codes entered in a comma-separated list. For example, to select codes "a", "b", and "d" for a multi question, type: **a,b,c** and then press **Enter**. Once you have pressed **Enter**, the selection will be made in the form.
- **Multi Open and Multi Numeric questions** – you can type any text into the keyboard entry box. When you press **Enter**, the text will be copied into the form for the highlighted multi category selected, and the next category will become active.
- **Single questions** - only one code will be allowed. Press the **Enter** key to make the selection in the form.
- **Open questions** - you can type any text into the keyboard entry box. When you press enter, the text will be copied into the form.
- **Grid and 3D-Grid questions** - these question types should be handled as separate questions. This means that the highlighting of questions should highlight each "question" inside this grid/3D grid. The keyboard entry box will behave differently dependent on the underlying question. For example, a grid can be seen as multiple single questions. A 3D-Grid is a collection of single/multi/grid questions sharing the same answer list.

Press **F2** to move to the next question, as described above. Alternatively, you can also move to the next question by pressing **Enter** when the text box is empty. If the last question on the page is highlighted, the entry text box is empty and the user presses **Enter**, the form will be submitted and the next page will be displayed (if the validation is passed).

When the page is submitted, if errors are discovered on the page then the first question containing an error will be selected.

If the interviewer attempts to answer a question with the mouse by clicking on the question, the question will be highlighted.

## 5.7.2. Limitations when using the Keyboard

When using the keyboard, the following limitations apply:

- Sliders will not visibly move, although the selected value will have been accepted. To view the change, the interviewer must move forward in the survey then back to the question.
- When images are used as answers, if different images have been defined for the different states (default, hover and selected) these images will not change although the selected answer will have been accepted. To view the change, the interviewer must move forward in the survey then back to the question.
- Subsequent questions that appear on dynamic pages will not be displayed until the page is submitted. Therefore the interviewer must submit the page and remain on or return to it to answer subsequent questions.
- The interviewer cannot use the keyboard to supply answers for card sort questions.
- The interviewer cannot use the keyboard to supply answers for drag and drop (ratings) questions.
- The interviewer cannot use the keyboard inside the calendar control for date-picker questions.

## 6. Kiosk Mode

Agencies and companies wishing to conduct onsite self-interviewing activities such as customer experience measurement, mall interviewing and onsite product testing, can use the Confirmit Kiosk functionality to collect survey responses without the intervention of an interviewer. Companies can also employ Confirmit Kiosk stations as an alternative to paper-based surveys, thereby reducing the cost, time, and errors inherent in traditional paper methods.

The installation, set-up and synchronization procedures for a Kiosk console are similar to those used with CAPI, though different license/activation files are required(see The Activation Files for Windows on page 6 for more information).

When a user logs on to a console in Kiosk mode, the only significant visible difference from the CAPI mode is the **Enter Kiosk Mode** button. Other functionality is the same as described in the Interviewer Console chapter.

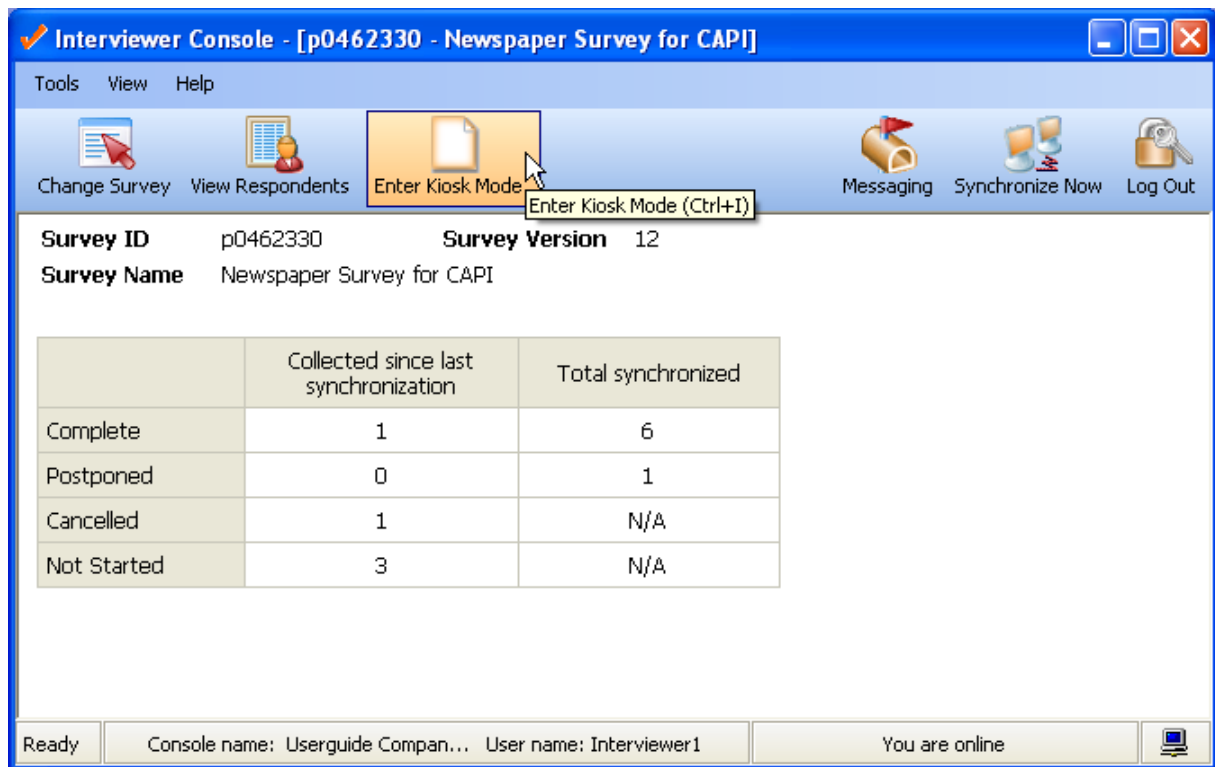


Figure 83 The console in Kiosk mode

### 6.1. How to Start the Console in Kiosk Mode

1. Synchronize the console and download the required survey.
2. When you are ready to activate the Kiosk station for the respondents, click the **Enter Kiosk Mode** button. The Kiosk Mode Password dialog opens.

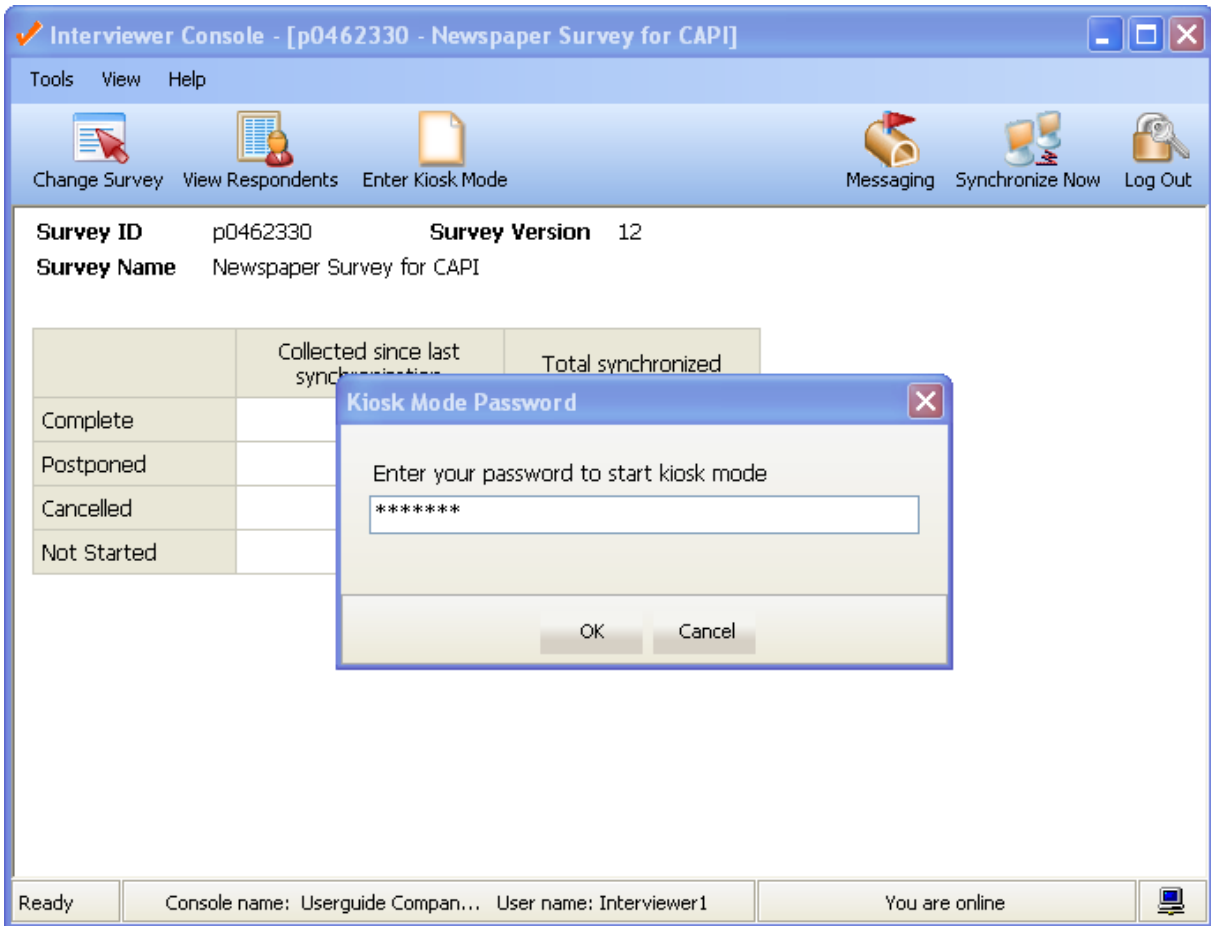


Figure 84 The Kiosk Mode Password dialog

3. To activate the Kiosk station, enter your console password and click **OK**.  
The console opens the survey on the first page.

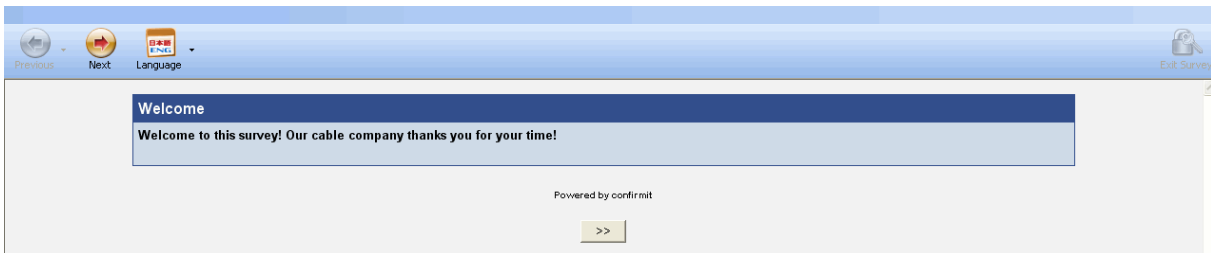


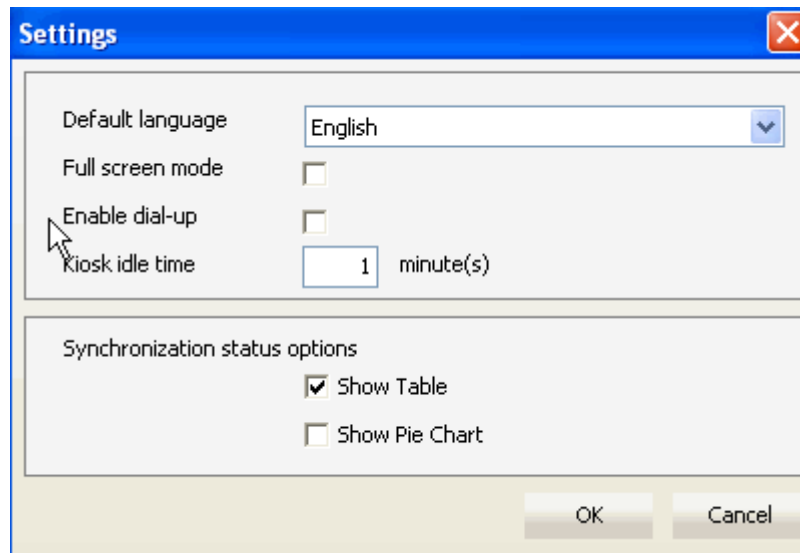
Figure 85 Example of a survey in Kiosk mode

## 6.2. How to Set the Idle Time

When the console is set up in Kiosk mode, windows keyboard shortcuts such as **CTRL-Esc**, **Alt-TAB** etc. are disabled. When a respondent has completed a questionnaire, or after a configurable period of inactivity, the console reopens the survey on the first page ready for a new respondent. The inactivity function is required to reset the console in the event a respondent leaves the survey incomplete without clicking the **Exit Survey** button.

1. To set the idle time, go to the **Tools > Settings** menu command.

The Settings window opens.



*Figure 86 Setting the Kiosk idle time*

2. In the **Kiosk idle time** field, specify the time in minutes that the console may be idle before it resets itself to the first page of the survey ready for a new respondent.
3. Click **OK**.

### 6.3. How to Close the Console

When you wish to exit the Kiosk mode:

1. Press the key combination **Ctrl+Shift+X** on the console keyboard.  
The Password dialog opens.
2. Enter the console password and click **OK**.  
The Console Administration window opens.

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