Confirmit SmartHub User Guide

Confirmit v18

This is document revision 2 of the Confirmit SmartHub User Guide. The information herein describes Confirmit SmartHub and its features as of Build nr. 4015 published in August 2014. New features may be introduced into the product after this date. Go to www.confirmit.com or check “News” on the Customer Extranet for the latest updates.

Table of Contents

What's New in this Revision?

The following changes have been made in revision 2 of the Confirmit SmartHub User Guide:

- The text in the Introduction section is edited (see What is SmartHub - Introduction on page 1 for more information).
- The Encryption and Storage Cost sections are added to the How it Works section (see How it Works on page 1 for more information).
- The How to Remove and Restore Sources sections are added to the Sources Tab section (see The Sources Tab on page 9 for more information).
- The How to Restore a Hub section is added (see How to Restore a Hub on page 17 for more information).
- The How to Unlink a Survey... section (old section 5.6.2.) is removed as it is no longer relevant.
- The Historical Data section (old section 5.7.) is removed as it is no longer relevant.

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

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

1. What is SmartHub - Introduction

Confirmit SmartHub™ is a centralized area for data management and optimization. It allows multiple data sources of different types to be brought together, relationships defined, and readied for use in dashboards, analysis, reports, action management, and other areas. SmartHub reduces the need for data processing tasks to merge data across data sources and map data sources together for use in reporting and analytics.

SmartHub is built on MS SQL Server 2014. The SmartHub Columnstore provides very fast query support, especially for ad-hoc queries on large data sets. It requires MS SQL Server Enterprise Edition, so On-Premise clients who wish to use SmartHub must have Enterprise Edition installed.

The SmartHub Column Store Offers very good support for analytics and reporting on VoC, VoE and MR programs:

- Personalized interactive dashboards.
- Hierarchies, drill-down.
- Ad-hoc reporting: Top-line and banner reports.
- Data discovery.
- Advanced analytics.
- Joining data across many data sources. One-to-many relations.

Confirmit SmartHub supports:

- Surveys (Professional/Express/Polls). Note also that the surveys must be launched before they can be used.

SmartHub does not currently support:

- Standard Panels/Professional Panels.
- Basic Panels.
- Test databases.

Note: Hubs cannot be created or edited via Reportal, or by a report viewer. The hub creation/editing facility is only available via Horizons Authoring, by users with the appropriate permission.

To use a hub in Reportal, the user must have at least View permission (see Hub Permissions on page 14 for more information).

1.1. How it Works

Data is moved continuously from surveys and other data sources over to a separate database (the SmartHub Column Store) for reporting and analytics. SmartHub supports continuous updates of data as an alternative to updating according to a set recurrence pattern (for example daily). For continuous updates, the “Hub Data Controller” will check the data sources for changes once every five minutes, and will initiate a load task if any changes are registered. If no changes are registered, then no task is initiated. Both data and meta data (survey schema) will be synchronized.

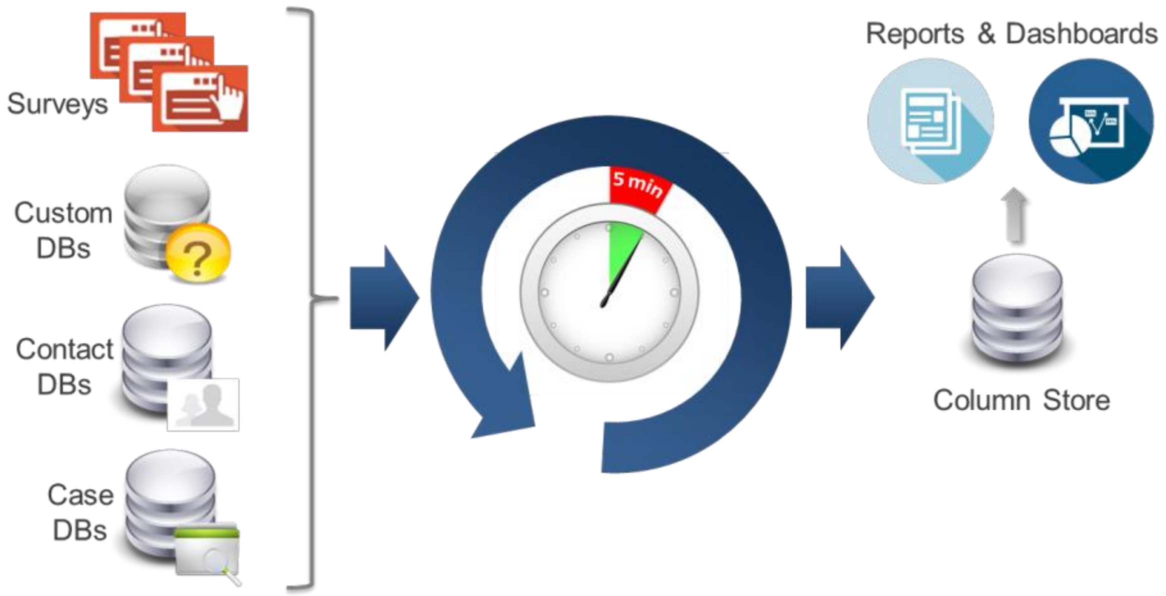

Figure 1 SmartHub block diagram

1.1.1. System Requirements

Confirmit SmartHub		
Element	Minimum	Recommended
Operating system	Windows Vista SP2. OS X	Windows 7 or Windows 8 Desktop.
Web browser	Internet Explorer 9 (Windows only), Firefox 28, Chrome 32.	Internet Explorer 11, Firefox (latest), Chrome (latest).

1.1.2. Encryption

For companies that have the “Database Encryption” add-on, the entire hub database will be encrypted if the company has enforced DB encryption across all their projects. If not, the hub database will not be encrypted.

1.1.3. Storage Cost

For Confirmit SaaS clients, SmartHub is offered with at no additional cost for up to 10 GB of data. For larger data volumes, additional costs apply. Reports on storage consumption will be included in the monthly reports.

For Confirmit On Premise clients, SmartHub is offered at no additional cost, regardless of storage consumption.

2. Opening the SmartHub Page for the First Time

When you are logged into Confirmit and you go to the **Home > SmartHub** menu item or you click on **SmartHub** in the Quick Access pane, the SmartHub page opens. If this is the first time you are entering this page and you therefore have not yet created a hub, you are invited to create one.

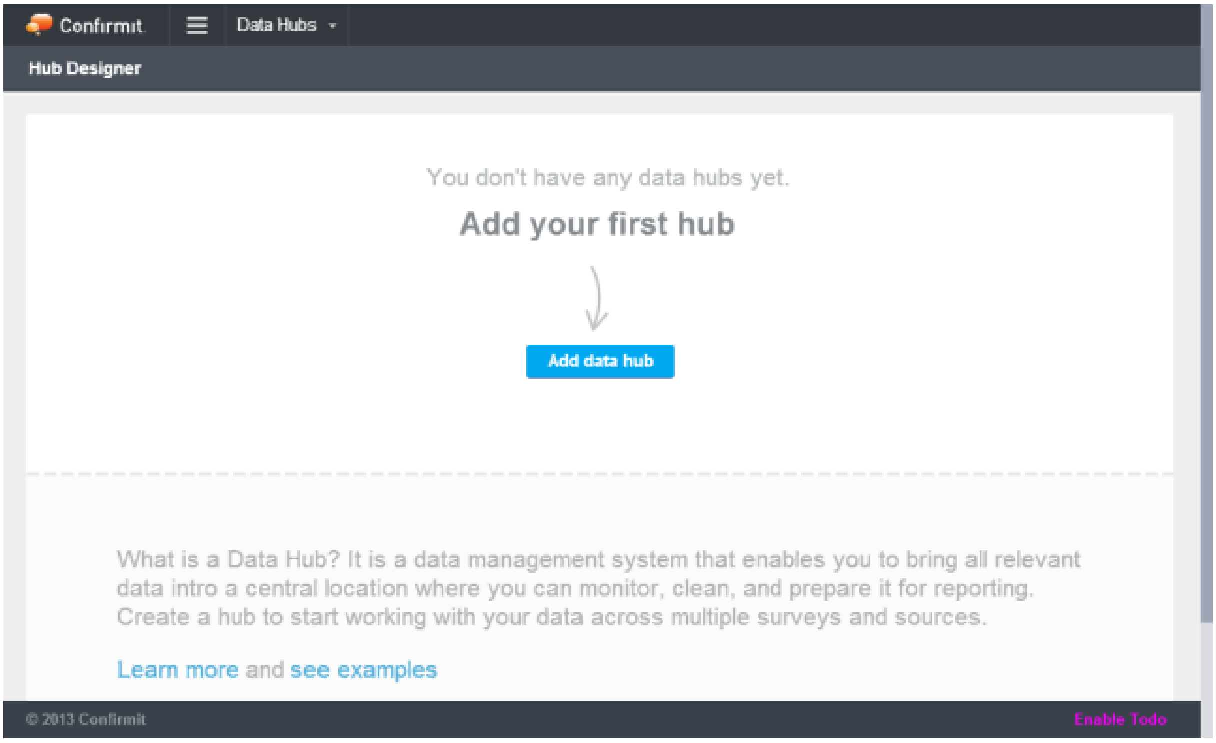

Figure 2 The opening page when there are no pre-existing hubs available to you

2.1. Creating Your First Hub

1. In the SmartHub page, click **Add hub**.

   The New data hub overlay opens.

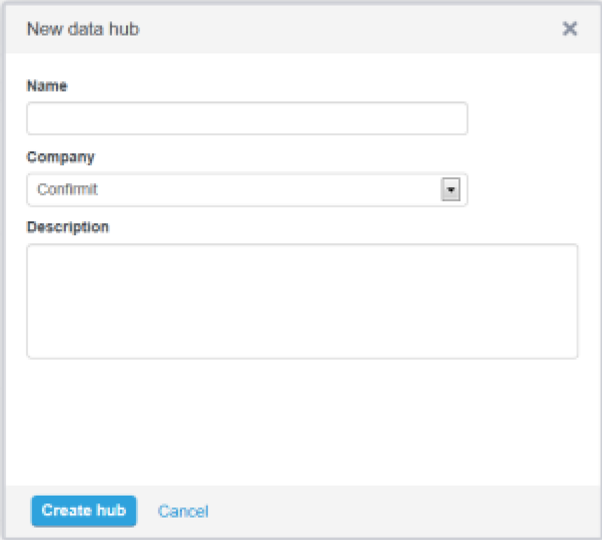

Figure 3 The New data hub overlay

2. Give the new hub a name.
3. Most users will only have access to one company - their own - so the Company field will not be visible. If you have access to more than one company then the Company field will be visible; select the company to which the hub is to be linked.
4. Type a brief description of the hub into the Description field for future reference if required.
5. Click **Create Hub**.

   The hub is created and the Hub Designer page for the hub opens.

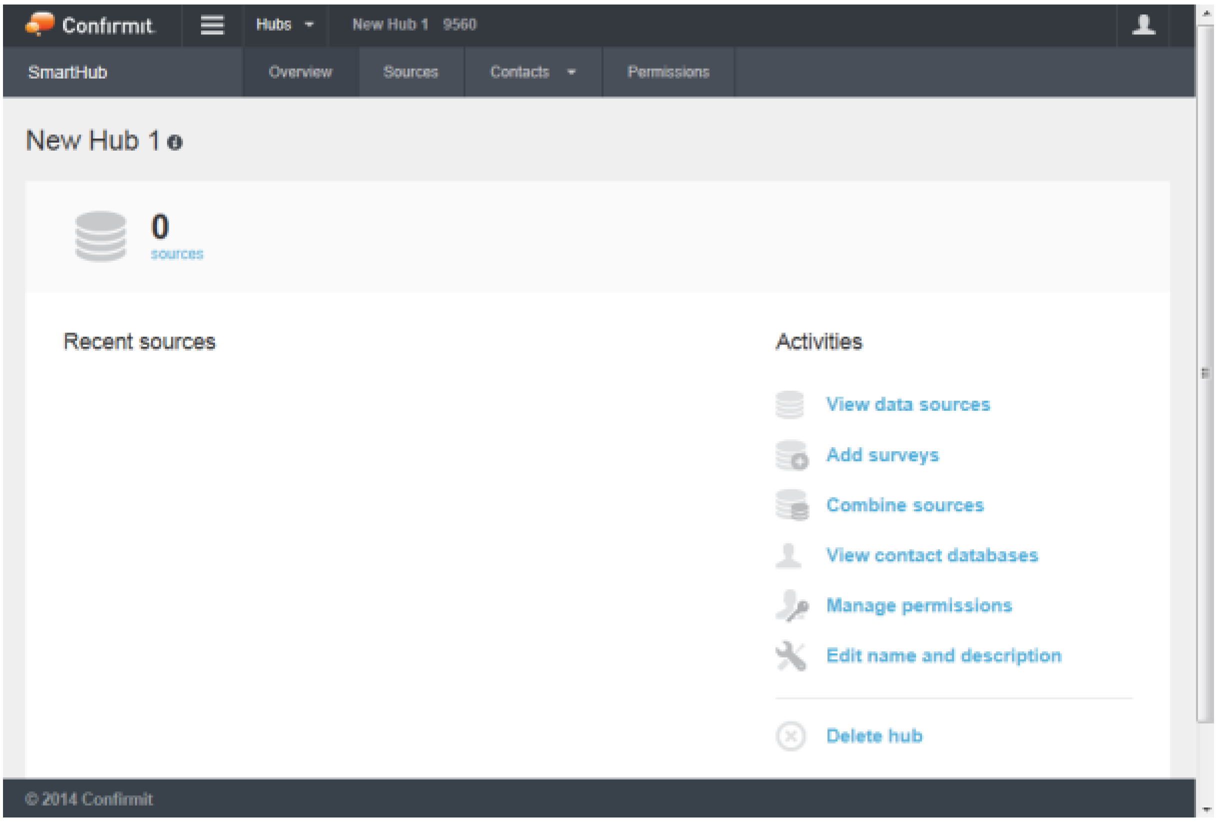

Figure 4 The Hub Designer > Overview page

You can now add data sources (see How to Add a Data Source to the Hub on page 16 for more information), set access permissions (see Hub Permissions on page 14 for more information), and generally set up the hub ready for use (see The Hub Designer Page on page 7 for more information).

2.2. The SmartHub Page with Preexisting Hubs

If you have already created a hub, the Hub Designer page will open with that hub displayed. If you have more than one hub, then the page opens with a list of the hubs available to you. Click on the blue hub name link to open the Hub Designer page for that hub (see The Hub Designer Page on page 7 for more information).

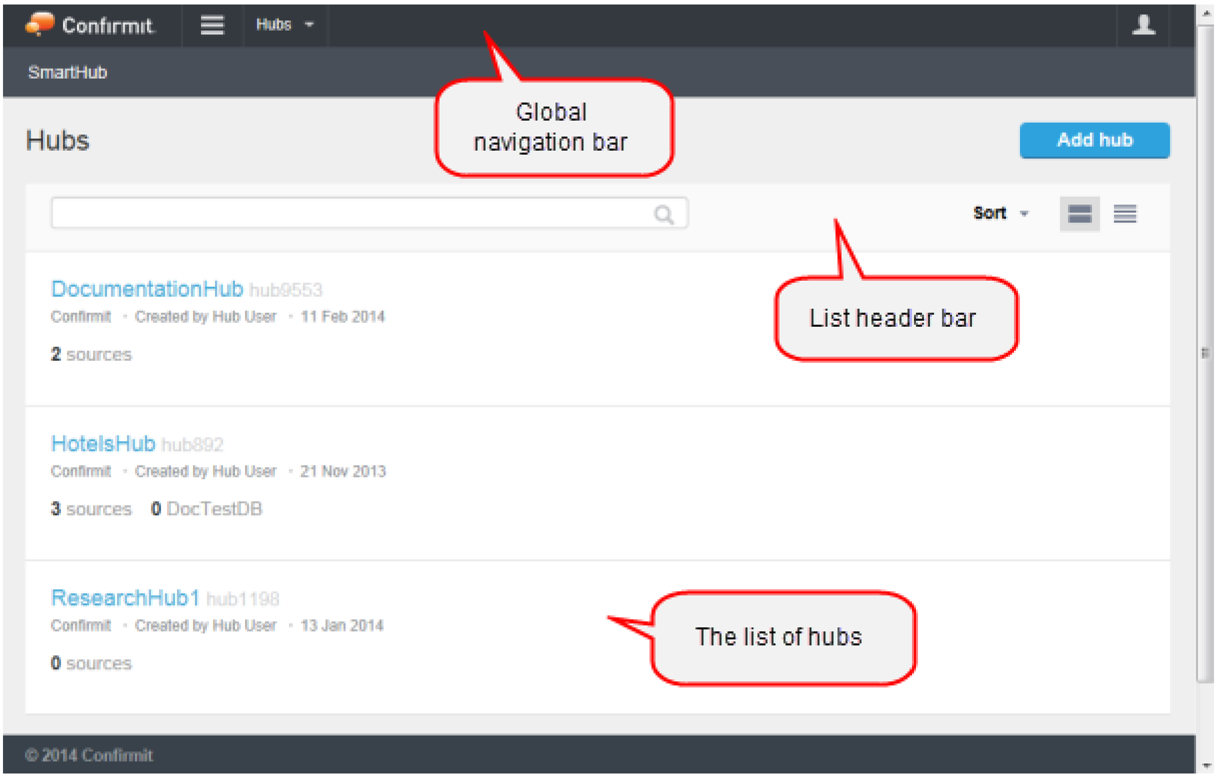

Figure 5 Example of the SmartHubs page

The Global navigation bar holds the following tools:

- The **Navigate** button  - allows you to go directly to other relevant Confirmit functionality.
- The **Hubs** button - opens a list of the hubs you have access to, hubs you have accessed recently, and allows you to create a new hub.

The List Header bar includes:

- A **Search** field. Type a text string into the Search field and press the **Enter** key on your keyboard to display only those hubs with names that start with the entered text. Note that the search text is case-sensitive. To re-display the full list, clear any characters from the field and press **Enter**.
- If you wish to sort the list, click **Sort** and select the sorting method required.
- **Expand -** if the list has been collapsed (the information area is hidden), click **Expand** to show the information area.
- **Collapse -** click to hide the information areas for the hubs listed. This will allow more hubs to be visible on your display without scrolling.

2.3. The SmartHub List Details

When you open the SmartHub page, each hub that you have access to is displayed as one row in the list.

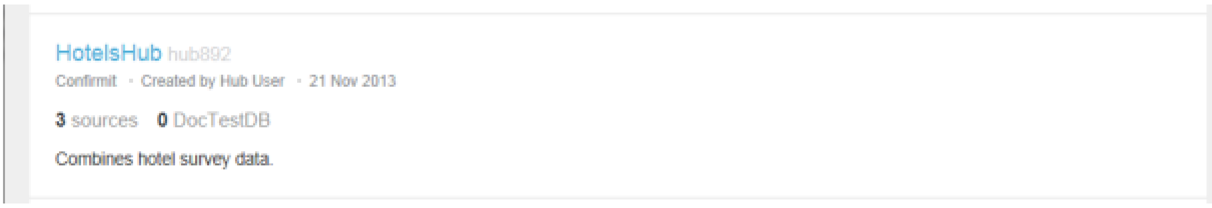

Figure 6 Example of Hub link and information

Click on the blue hub name link to open the Hub Designer page for that hub (see The Hub Designer Page on page 7 for more information). The details displayed for each hub include:

- **Hub name -** this is the access link to the hub. Click on the link to open the Hub Designer page for that hub.
- **Hub number -** when the hub is created it is automatically given the next available number. If a hub is deleted, its number is not re-used.
- **Confirmit -** the name of the company against which the hub is registered.
- **Created by... -** the username of the person who created the hub, and the date the hub was created.
- **Sources -** indicates the number of sources currently linked to the hub. Other details may be listed here, such as any contact databases, notifications etc.
- **Description -** any text below the information area is taken from the Description field in the Hub Designer page.

3. The Hub Designer Page

The Hub Designer page allows you to create a hub, select which data sources are to be made available in the hub, and define relationships between the data sources. In addition you can use the Hub Designer to monitor data feeds into the hub, resolve issues etc.

You can create as many hubs as you need. For many clients it will make most sense to have one hub for their entire survey program, however for companies that are running several survey programs for other companies it would probably make most sense to create one hub for each company they are working with.

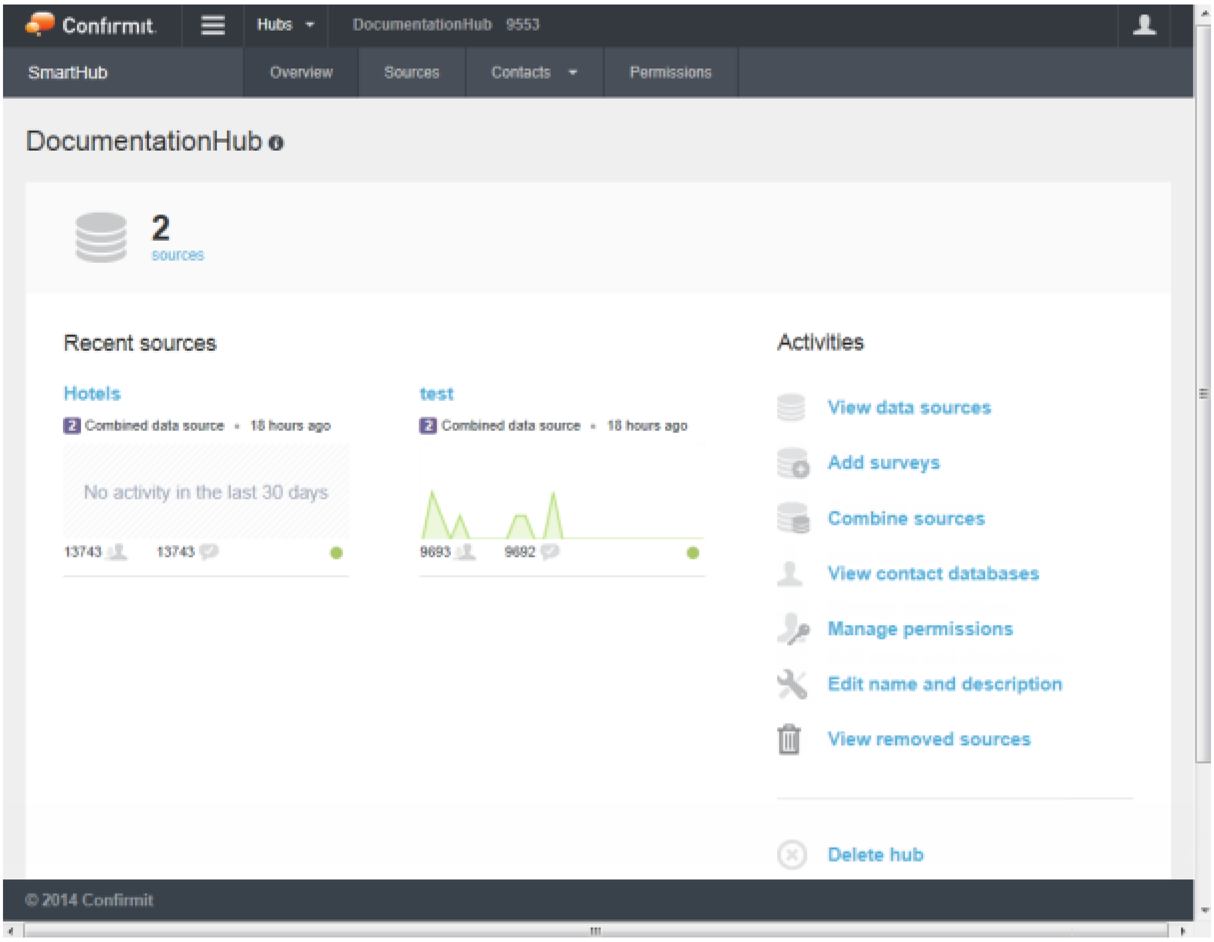

Figure 7 The Hub Designer page

The Hub Designer page toolbar includes the following tools:

- **Overview -** opens the Data Hubs page in which all the hubs you have access to are listed (see The SmartHub Page with Preexisting Hubs on page 5 for more information). If you only have access to one hub, then the Hub Designer page will open with this hub.
- **Sources -** opens the Sources page, in which the data sources linked to the hub are listed (see The Sources Tab on page 9 for more information). See also the View data sources link in the **Activities** menu.
- **Contacts -** opens the Contact databases page, in which any contact databases you may have created are listed(see Contact Databases on page 26 for more information). Here you can also create new contact databases. See also the View contact databases link in the **Activities** menu.
- **Permissions -** opens the Permissions page, allowing you to add and edit the users who can make use of this hub (see Hub Permissions on page 14 for more information). See also the Manage permissions link in the **Activities** menu.

The Sources area shows the data sources that are linked into this hub, giving an overview of what these sources are and the recent activity within them (see Sources on page 8 for more information).

The Activities menu lists and provides links to the activities you can undertake related to the hub (see The Activities Menu on page 12 for more information).

3.1. Sources

Data sources, as the name implies, provide the data to the hub such that it can be used in dashboards, reports etc. These sources are the Professional, Express and Poll surveys previously created using Confirmit Authoring. Each source linked to a hub is presented in the Hub Designer page for that hub, and in the Sources tab (see The Sources Tab on page 9 for more information).

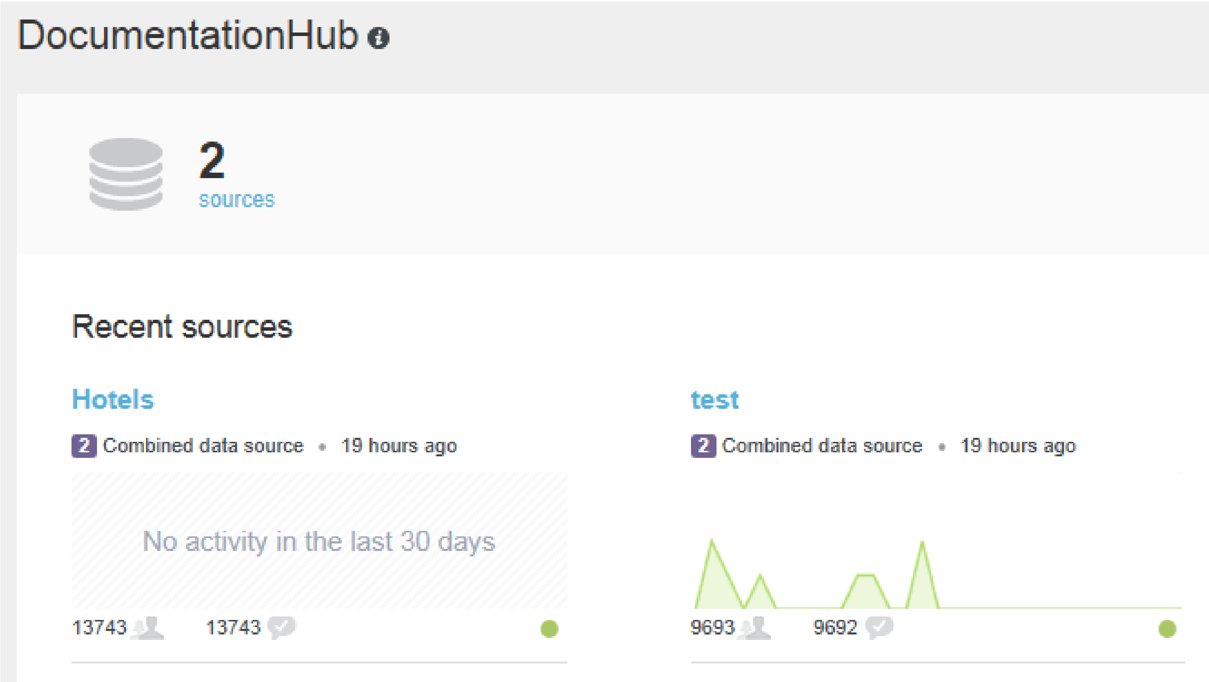

Figure 8 Example of data sources listed for a hub

For each data source is presented:

- The type of data source, and if it is a combined data source, the number of sources that it contains.
- The number of invitations and the number of completes are given below the activity chart.
- A chart of the respondent activity over the last 30 days.
- Hover the mouse cursor over the Activity chart to view details of the recent respondent activity.

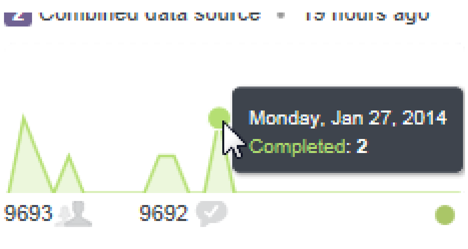

Figure 9 The activity chart details

- Click on the blue source name link to go to the Manage Source page for that source (see The Manage Source Page on page 11 for more information).

3.2. The Sources Tab

In the hub's navigation bar, click **Sources** to open the Sources tab for the current hub. This tab provides details about the sources linked to the hub, and allows you to add additional surveys, create combined sources (see How to Create a Combined Data Source on page 20 for more information), and remove the source if necessary.

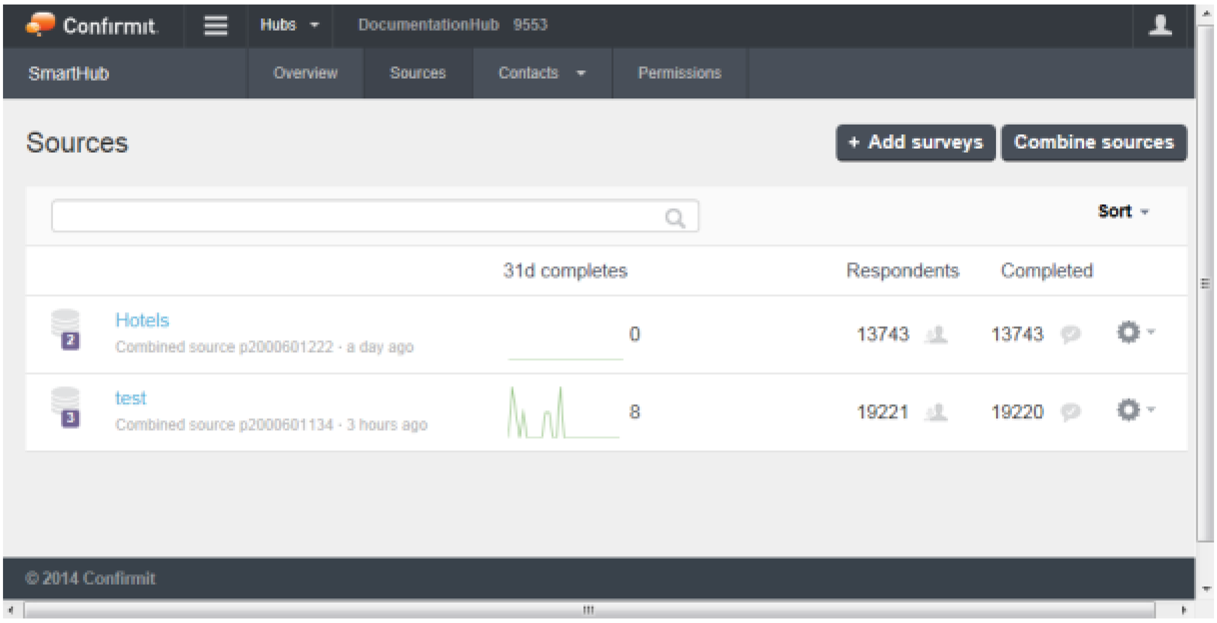

Figure 10 Example of the sources tab

Click anywhere in a source row to go to the Manage Source page for that source (see The Manage Source Page on page 11 for more information).

For each data source is presented:

- The type of data source, and if it is a combined data source, the number of sources that it contains.
- The source name and number, and when it was last edited.
- A chart of the respondent activity and the number of completes registered during the last 31 days.
- The number of invitations sent and the total number of completed interviews.

If you wish to sort the list, click **Sort** and select the sorting method required.

Click **Add surveys** to add more surveys to the hub (see How to Add a Data Source to the Hub on page 16 for more information).

Click the **Combine sources** button to create a combined data source for the hub (see How to Create a Combined Data Source on page 20 for more information).

Click the edit icon for a drop-down menu that enables you to manage the data source (see The Manage Source Page on page 11 for more information) and remove it from the hub if required (see How to Remove a Source on page 9 for more information). Note that removed sources can be restored during a period of 30 days (see How to Restore a Source on page 10 for more information).

3.2.1. How to Remove a Source

You can remove unwanted sources from a hub. Note that if you remove a source from a hub, any reports or dashboards using that source will cease to function.

To remove a source:

1. Go to the Sources tab (see The Sources Tab on page 9 for more information).
2. Click the edit icon for the source you wish to remove.

   A drop-down menu opens.

3. Select **Remove source**.

   A warning dialog is displayed showing the details of the source you are about to remove.

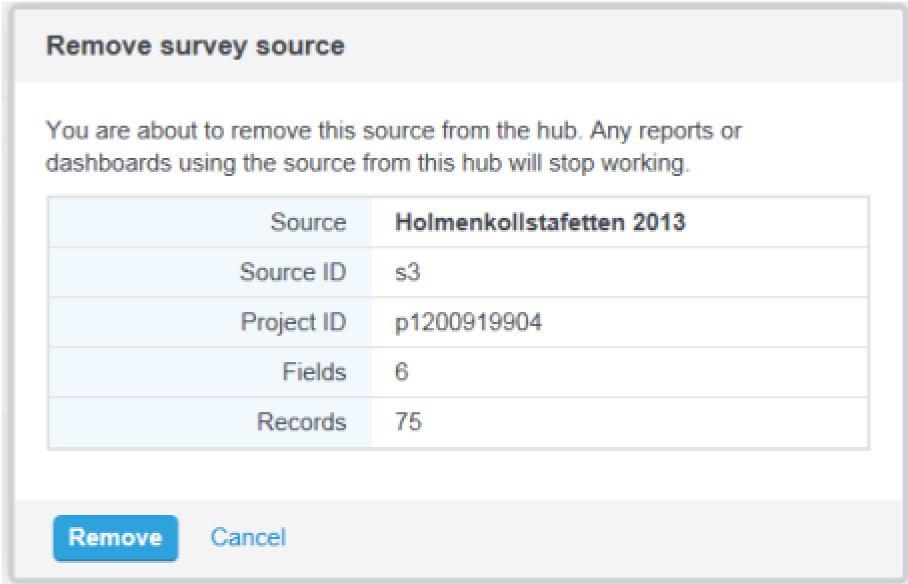

Figure 11 The remove source warning dialog

4. Click **Remove** to remove the source or **Cancel** to stop the operation.

Note that deleted sources will remain in the system for 30 days and can be restored during this period (see How to Restore a Source on page 10 for more information).

3.2.2. How to Restore a Source

If a source is deleted from your hub, it will remain in the system for a period of 30 days. During this period it will be listed under **View removed sources** in the hub's **Activities** menu. To restore a removed source:

1. While in the hub, go to the **Activities > View removed sources** menu item.

   The Removed sources page opens.

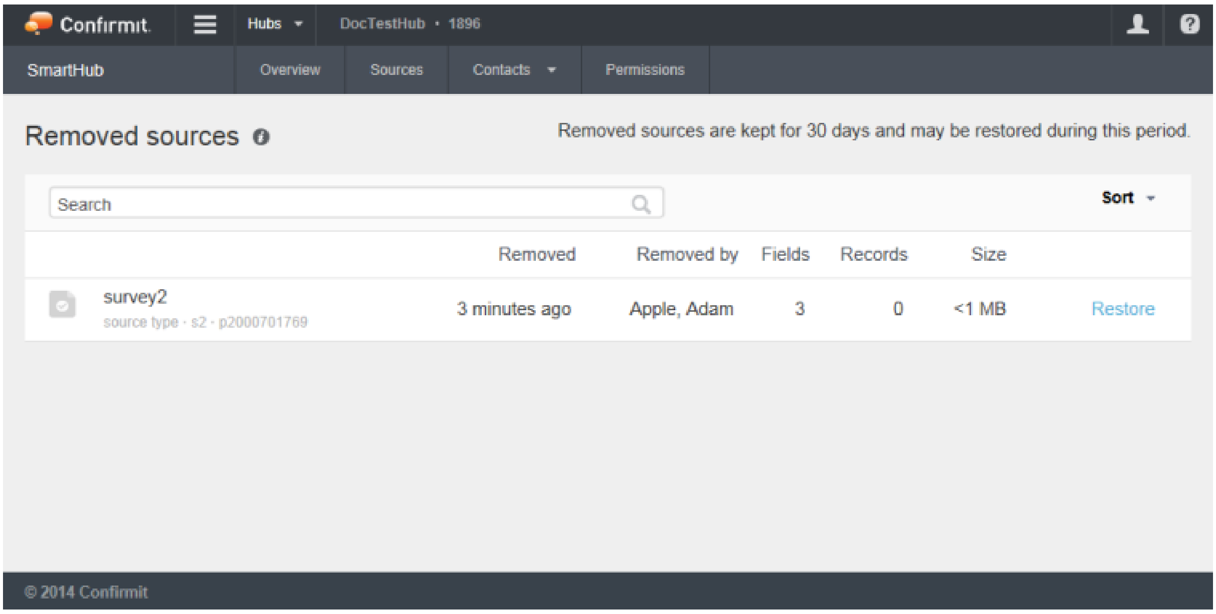

Figure 12 Example of the Removed Sources page

2. Click the **Restore** button for the source you wish to restore.

   A confirmation dialog box is displayed.

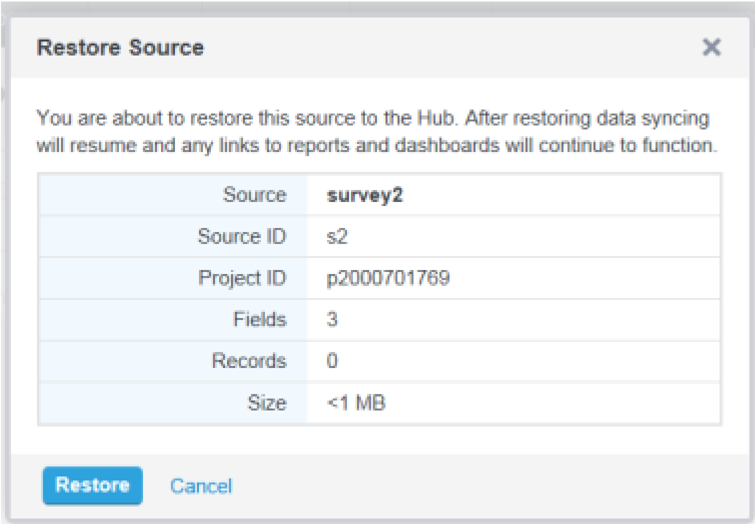

Figure 13 The Restore Source confirmation dialog

3. Click **Restore** to restore the source to the hub, or **Cancel** to stop the process.

After the source is restored you can then go to the source to manage it if required.

Note: If you remove a source and then manually add the same survey to the hub again (instead of using Restore) it will be given the same source id, so any reports or dashboards referencing the source will work again once the source is replaced. A manual replacement therefore functions essentially the same as Restore (though Restore is simpler to use).

3.3. The Manage Source Page

This page provides greater details about the selected source. The layout and tools provided depend on the type of source.

If the source is a combined data source, then you can map additional surveys into the source (see How to Map a Survey into an Existing Combined Data Source on page 23 for more information), view and edit the mappings (see Viewing and/or Editing the Mapping on page 23 for more information), synchronize the data in the source, and remove the combined data source.

If the source is an individual survey, then you can remove it from the hub.

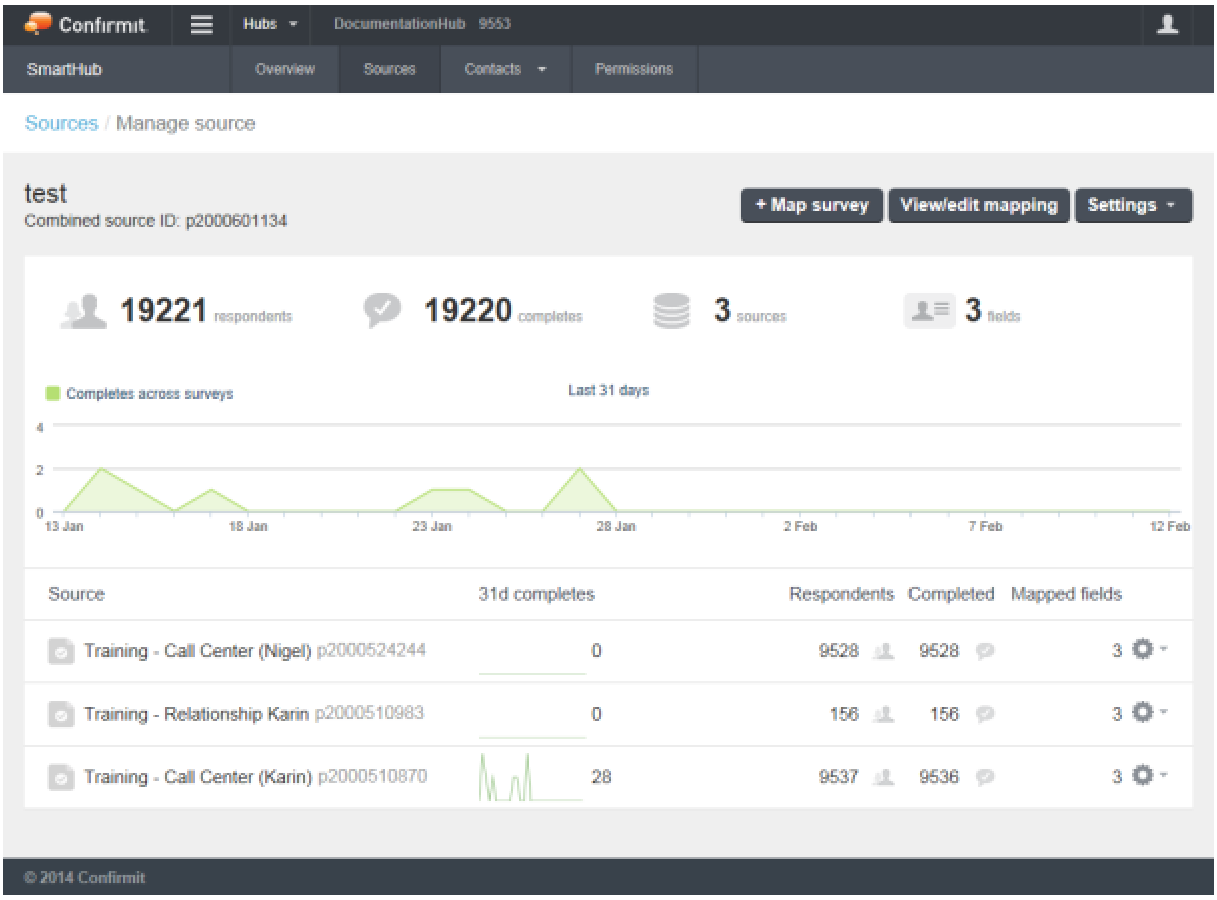

Figure 14 Example of the Manage Source page for a combined data source

- An information row above the chart provides the following details:
  - o The number of respondents that are linked to the source.
  - o The total number of completes that are registered for the source.
  - o If the source is a combined data source then the number of surveys that are linked to it.
  - o The number of variables (fields) in the source.
- The activity chart tells you how many completes have been registered for the source on a daily basis during the last 31 days. Hover the mouse cursor over the Activity chart to view details of the activity.
- If the source is a combined data source, then the surveys linked into the source are listed below the chart. Click the **Hub menu** icon for a source to open a drop-down menu that enables you to unlink the source from the data source.

3.4. The Activities Menu

The Hub Designer page contains a menu of the activities you can perform on the hub.

- **View data sources -** displays a list of the data sources that are currently linked into the hub, giving details on each.
- **Add surveys -** opens a list of the surveys available to you, allowing you to add more surveys to the hub (see How to Add a Data Source to the Hub on page 16 for more information).
- **Combine sources -** starts the procedure for combining data sources (see How to Create a Combined Data Source on page 20 for more information).
- **View contact databases -** opens a list of contact databases that are available to you, and allows you to create new databases (see Contact Databases on page 26 for more information).

- **Manage permissions -** opens the hub permissions page, allowing you to add and edit the users who can make use of this hub (see Hub Permissions on page 14 for more information).
- **Edit name and description -** opens the Edit hub overlay where you can change the name and/or description of the hub.
- **View removed sources -** opens a list of any sources that have been removed from the hub during the last 30 days. Sources can be restored during this period (see How to Restore a Source on page 10 for more information).
- **Delete hub -** click to start the hub deletion process (see How to Delete a Hub on page 17 for more information).

3.5. How to Create a New Hub

1. In the Hubs page, click **Add hub**.

   The New data hub overlay opens.

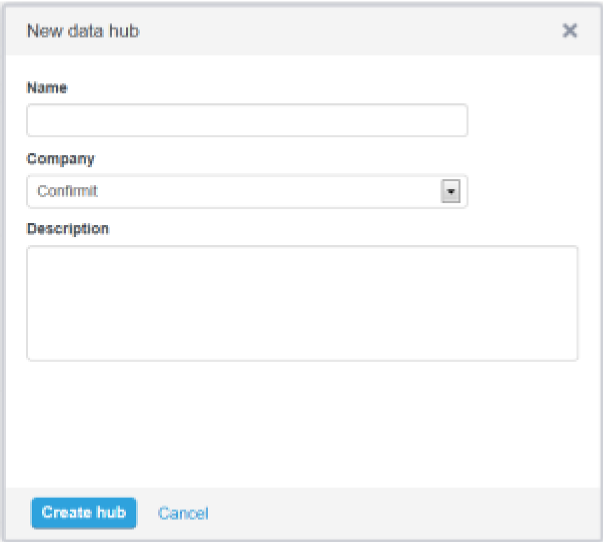

Figure 15 The New data hub overlay

2. Give the new hub a name.
3. Most users will only have access to one company - their own - so the Company field will not be visible. If you have access to more than one company then the Company field will be visible; select the company to which the hub is to be linked.
4. Type a brief description of the hub into the Description field for future reference if required.
5. Click **Create Hub**.

   The hub is created and the Hub Designer page for the hub opens.

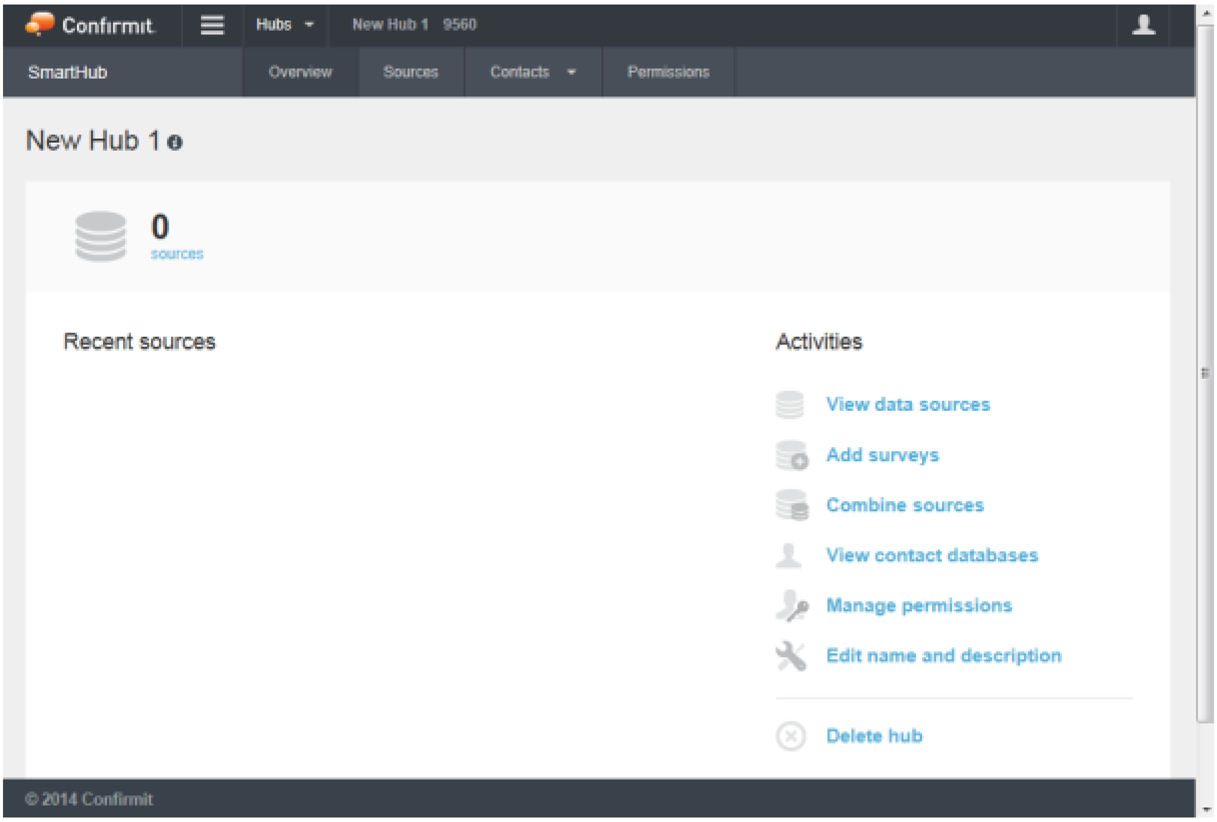

Figure 16 The Hub Designer > Overview page

You can now add data sources (see How to Add a Data Source to the Hub on page 16 for more information), set access permissions (see Hub Permissions on page 14 for more information), and generally set up the hub ready for use.

3.6. Hub Permissions

The Hub Permissions page allows you to specify who can manage the hub and who can only view it. Here you can add users to the list from your company or other companies, remove users from the list, and allocate permissions to individual users or groups of users.

Note: Report end users will not have access to the Hub Designer, though they will have access to reports created using data from the hub.

To open the Hub permissions page, click **Permissions** in the Hub Designer navigation bar.

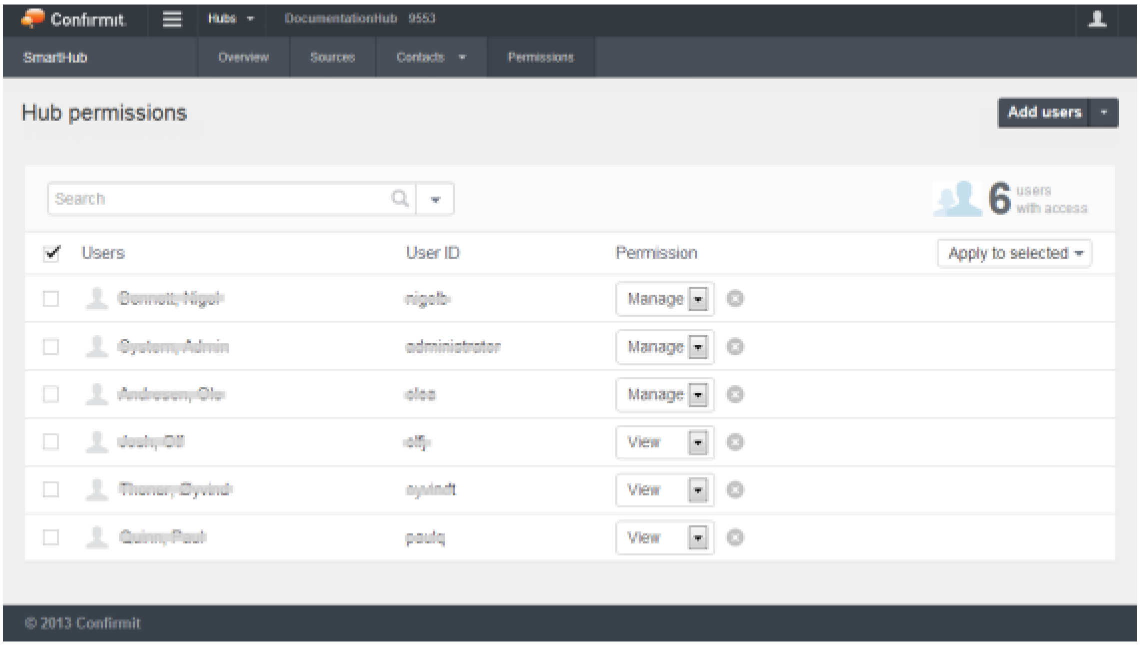

Figure 17 Example of the Hub Permissions page

The hub will by default enable you to add users registered in your own company (see How to Add Users to the Permissions List on page 15 for more information). If you wish to add users from a different company, click the down-arrow beside the **Add users** button and select **From another company** (see How to Add Users from Another Company on page 16 for more information).

- To change the access permission for a user, click the down-arrow in the Permission column for that user and select the desired permission.
  - o **View -** the user can see all the information in the hub, how it is defined etc. but cannot change any settings, add sources, set permissions etc. The user can access the hub in Reportal (refer to the Reportal User Guide for further details).
  - o **Manage -** the user can see all the information in the hub (as View) and in addition can change the setup, permissions etc.
- To change the access permission for a number of users, check the boxes beside the users you wish to change, click **Apply to selected** then click on the appropriate action.
- To remove a user from the Permissions list, click the **X** button in the Permission column for that user and then confirm the removal.
- To remove a number of users simultaneously, check the boxes beside the users you wish to remove, click **Apply to selected** then click **Revoke access** and confirm the action.

3.6.1. How to Add Users to the Permissions List

To add users from your own company to the Permissions list:

1. Click **Add users**.
2. In the Add users overlay which appears, check the boxes beside those users you wish to add to the permissions list for this hub.

   In the event the list is extensive you can type search criteria into the Search field and press **Enter** to search for users whose names begin with the input criteria.

   To acquire a better overview of the users you have selected, click **Show selected**; this removes any names that you have not selected. Click **Show all** to redisplay the full list.
3. When you have selected the users you wish to add to the Permissions list, click **Add users**.

The selected users are added to the Permissions list.

3.6.2. How to Add Users from Another Company

To add a user from another company to the Permissions list, you will need to have the user's User Key available. Typically, an external user will send you their user key by email; the user's key is displayed towards the top of that user's Confirmit User Settings page.

1. Once you have the user key available, click the down-arrow beside the **Add users** button and select **From another company**.
2. Enter the user key(s) into the field.
3. Select the permission you wish to give that user; View (default) or Manage.
4. Click **Add users**.

The selected users are added to the Permissions list.

3.7. How to Add a Data Source to the Hub

1. In the Hub Designer page, click **Sources** in the main navigation bar.

   The Sources page opens. This page lists all the data sources that are currently linked to the hub.

2. Click **+ Add surveys**.

   The Add surveys overlay opens.

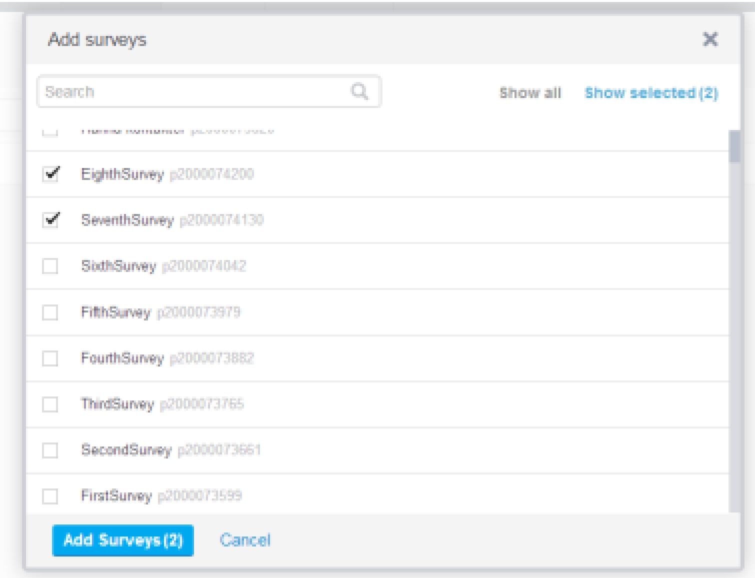

Figure 18 The Add Surveys overlay

   This overlay lists all the surveys to which you have access permission. In the event the list is extensive you can type search criteria into the Search field and press **Enter** to search for surveys with names beginning with the input criteria. To acquire a better overview of the surveys you have selected, click **Show selected**; this removes any surveys that you have not selected. Click **Show all** to redisplay the full list.

Note: Only surveys that belong to the company to which the hub is registered, will be listed. Only surveys launched in the production database can be added to the hub.

3. Check the boxes beside the surveys you wish to add to the hub.
4. Click **Add Surveys**.

   The selected surveys are added to the hub. When a source is added, the first synchronization of data will automatically run in the background. Depending on the size of the survey database, this may take some time. The correct numbers for the source will not be displayed until the first synchronization has completed.

3.8. How to Delete a Hub

1. In the Hubs page > **Global Navigation** toolbar, find and select the hub you wish to delete.
2. In the Activities menu, click **Delete hub**.
3. In the confirmation overlay, check that you are deleting the correct hub, then type **DELETE** into the field (note that this is not case-sensitive) and click **Delete hub**.

   The hub is deleted. Recently deleted hubs are listed in the Hubs menu in the global navigation toolbar for a period of 30 days. During this period you can restore a deleted hub via this menu (see How to Restore a Hub on page 17 for more information).

3.9. How to Restore a Hub

If a hub is deleted from your hub list, it will remain in the system for a period of 30 days. During this period, it will be listed under **Recently deleted hubs** in the global navigation toolbar.

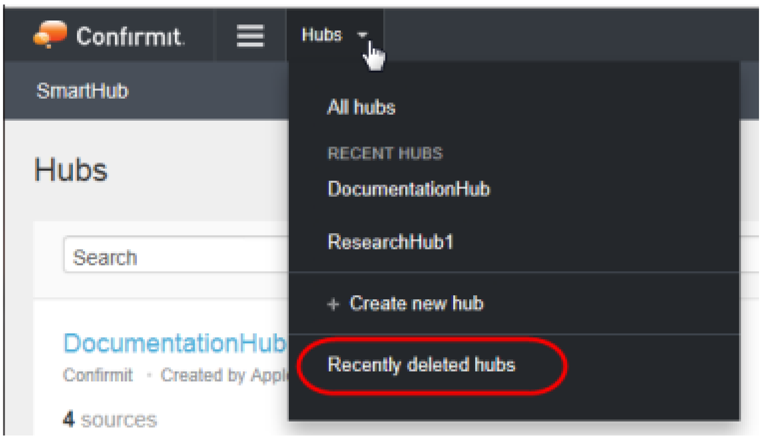

Figure 19 The Recently Deleted Hubs menu item

And during this time, if you change your mind about deleting it you can restore it to your hub list.

1. Click on the **Recently deleted hubs** menu item to open a list of the hubs that have been deleted in the last 30 days.

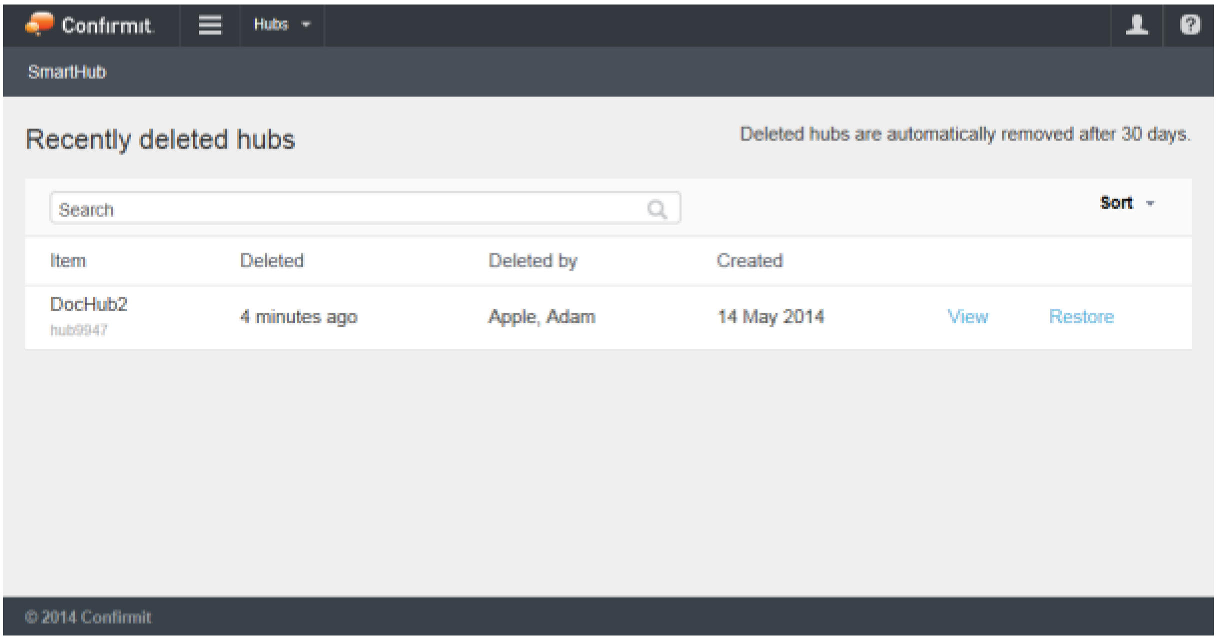

Figure 20 The Recently Deleted Hubs list

2. Click **View** to view the details of the hub.

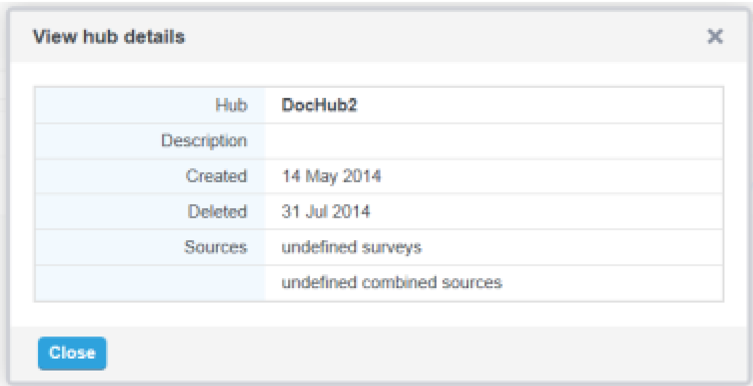

Figure 21 Viewing the details of a deleted hub

3. Click **Restore** and then **Restore hub** to restore the deleted hub to the hub list.

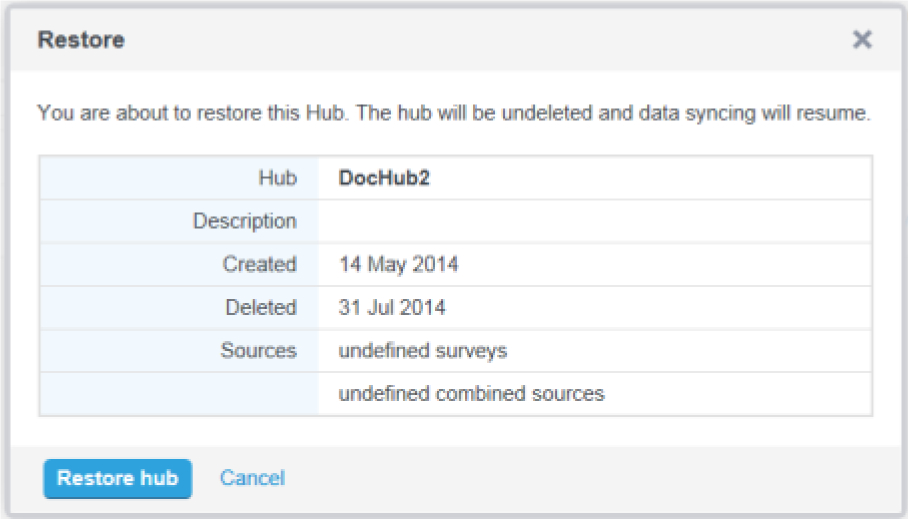

Figure 22 Restoring a deleted hub

4. Combined Data Sources

Combining of data sources (see How to Create a Combined Data Source on page 20 for more information) can be useful if:

- You may have a continually running survey (sometimes called a Tracker survey), for example the same survey that is sent out every month for a year. This survey may include small changes each time it is sent out to tailor it to changing circumstances etc. You can then combine the data from the 12 surveys to see developments over the year.
- You may be running a VoC program for a large international company. Perhaps there are small differences in the surveys sent out in the various countries to account for local customs and conditions. Again, the data from all the surveys can be gathered together for overall reporting.
- You would like to look at several different surveys (both transactional and relationship) and compare some key metrics such as for example overall satisfaction (OSAT) or Net Promoter Score™[1] (NPS™) in the same table or chart.
- You would for example like to compare how employees and customers answer if you have two surveys that have asked the same questions to the two groups.

When the various data sources are combined, the questions are mapped to ensure the same questions from each source are merged (see The Mapping Rules on page 25 for more information).

For reporting, the combined data source will function as one data source irrespective of how many data sources have been combined. However, the report will know which data source the specific data has come from, so the report end user can see this information.

4.1. How to Create a Combined Data Source

1. In the Hub Designer page, go to the Sources tab.
2. Click the **Combine sources** button.

   The Select surveys to combine page opens. This page lists all the surveys that you have permission to use.

Note: Only surveys that belong to the company to which the hub is registered, will be listed, and only surveys that are launched with the production database can be added to the hub.

[1]NPS and NET PROMOTER are registered trademarks of Satmetrix Systems, Inc., F. Reicheld, and Bain & Company

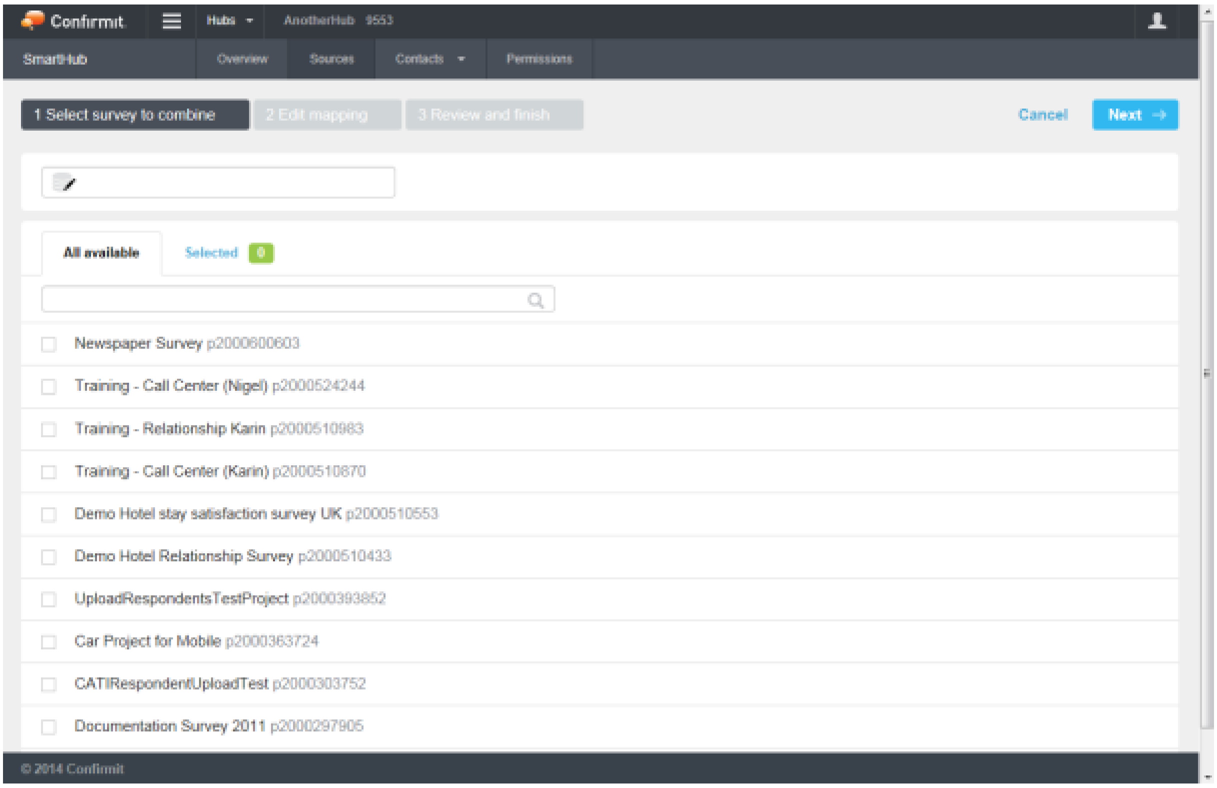

Figure 23 The Select surveys to combine page

3. In the top field, give the Combined data source a name.
4. Check the boxes beside the surveys you wish to add to the hub.

   The first survey you select will be designated as the Master Survey. Once you have selected more than one survey then you can change the Master Survey designation by clicking the appropriate button.

Note: When the combined data source is created, the hub makes a copy of the survey designated as the master and merges the additional surveys into the copy. This means that the original survey is not changed, but it also means that any changes made to the original survey after the data source is created will not automatically be incorporated into the combined data source.

5. Click **Next**.

   The Edit Mapping page opens. Here, all the variables for the surveys in the combined data source are listed.

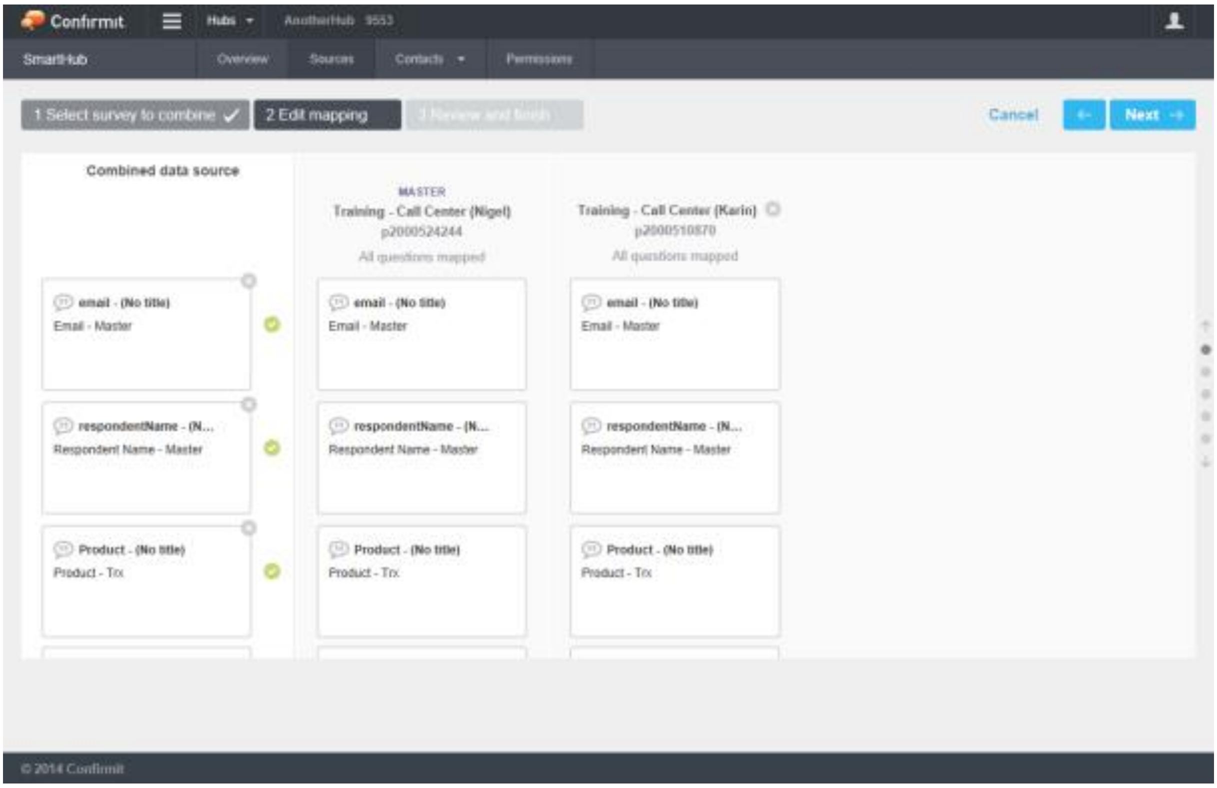

Figure 24 Example of the Edit Mapping page when combining two sources

Here, those variables that have the same questionID, are of the same question type and that have the same answer list or scale depending on type in all the selected sources, are automatically mapped (see The Mapping Rules on page 25 for more information) and given a green tick indicator. Any variables that do not appear comparable in all the selected sources will be highlighted. You can then choose to remove these from the combined source - click the **Delete** icon in the upper-right corner of the variable in the Combined data source column.

6. When you are satisfied with the mapping, click **Next**.

   The Review and finish page opens.

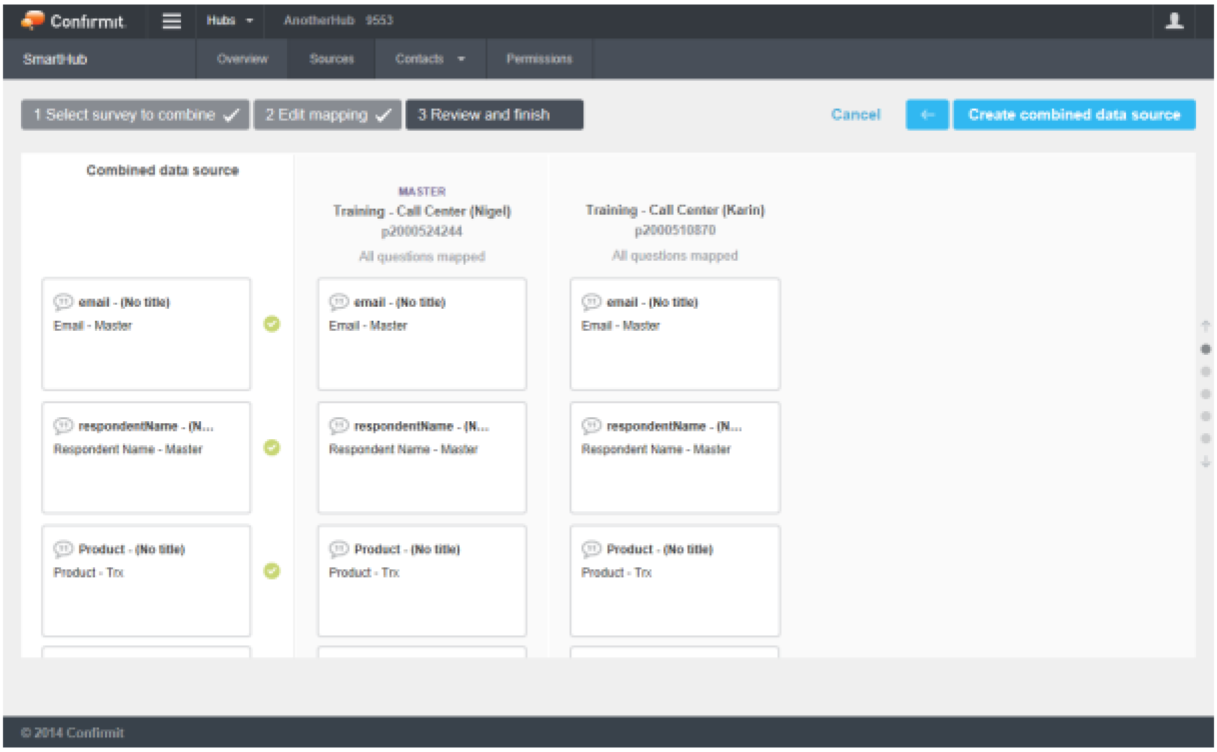

Figure 25 Example of the Review and Finish page

This is essentially the same as the Edit mapping page but without the editing possibility. In the event you wish to make further changes to the mapping, click the **Back** button to return to the Edit mapping page to make the changes.

7. When you are satisfied with the questions, click **Create combined data source**.

   The combined data source is saved and you are returned to the Sources page. From here you can edit the combined source adding or removing surveys, edit the mapping and synchronize the data.

4.2. How to Map a Survey into an Existing Combined Data Source

Once you have a combined data source, you can add further surveys to that source at any time.

1. In the combined data source, click the **+ Map survey** button.

   The Select survey to combine page opens.

2. Check the box(es) for the survey(s) you wish to add to the combined data source, then click **Next**.

   The Edit mapping page opens. Here, all the variables for the surveys in the combined data source are listed. The variables that have the same questionID, are of the same type and that have the same answer list or scale depending on type, are mapped automatically; other variables are listed with "No match". You can remove any questions from the selected surveys that you do not wish to include, and/or remove questions from the combined data source.

3. Click **Next**.

   The Review and finish page opens. Here you can check the variables and the mappings to ensure they are correct before saving.

4. If all is as required, click **Save changes**.

   You are returned to the Manage Source page for the combined data source.

4.3. Viewing and/or Editing the Mapping

1. In the Manage Source page, click the **View/edit mapping** button.

The View mapping page opens.

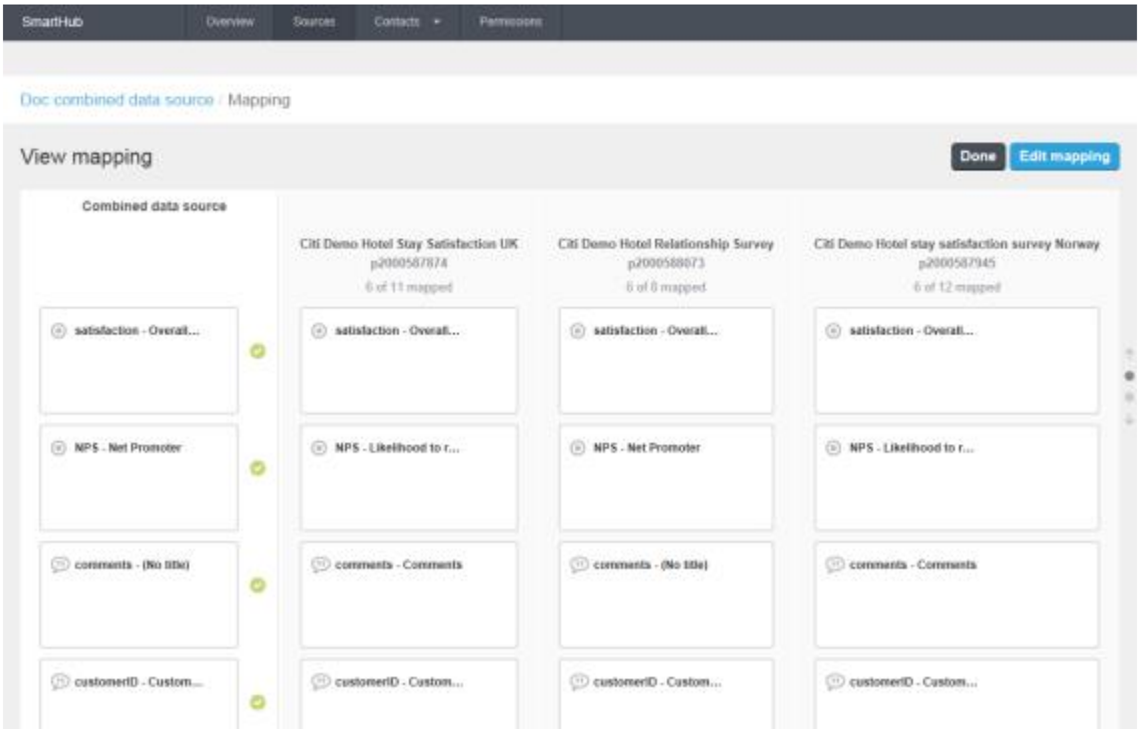

Figure 26 Example of the View mapping page for a combined data source

Here, all the variables for the surveys in the combined data source are listed.

2. If you wish to make any changes to the mappings, click **Edit mapping**.
3. The Edit mapping page opens.

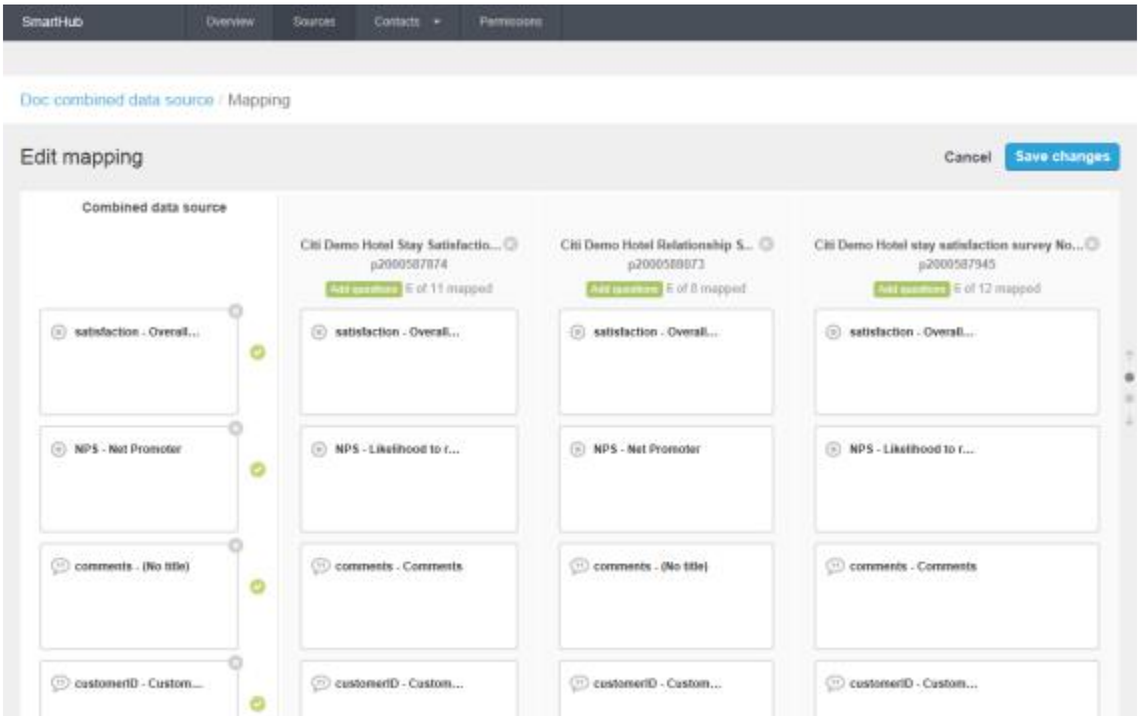

Figure 27 Example of the Edit mapping page for a combined data source

The editing functionality is activated and you can make the required changes.

4. On completion, click **Save changes**.

   You are returned to the Manage Source page for the combined data source.

4.3.1. The Mapping Rules

To ensure that the correct questions are merged when data sources are combined, automatic mapping functionality is provided in SmartHub. The hub will suggest mappings for questions depending on the following criteria:

- For Single, Open, Numeric, Multi and Date questions, the questions must be of the same type, they must have the same questionID, and Single and Multi questions must have the same answer list.
- For Grid, Open text list, Numeric list and Ranking questions, mapping will be performed at the field level (that is, for each answer). The questions must be of the same type, they must have the same questionID and Grid questions must have the same scale. They can have different answer lists, but if so, only matching answers will be mapped. For example, for a grid q1 with items 1, 2, 3 in survey A and a grid q1 with items 1 and 3 in survey B, fields q1_1 and q1_3 will be mapped between the two surveys.
- "Other - specify" questions will be mapped if the questions they belong to are mapped according to the rules above and they belong to the same answer list item.

Note: The system does not compare the question and answer texts within the questions as these may be different in different countries. You are therefore recommended to check all mappings before confirming them.

5. Contact Databases

A contact database allows you to gain greater understanding of your customers, employees or other contacts by creating a central store of their key information and a history of their transactions. This enables you to track their feedback and responses over time. The hub uses a single repository for all the data, such as name, email, address, gender, age etc. known as a “Contact database” (see How to Create a Contact Database on page 27 for more information).

Using a key such as “customerid” or “email”, you can link to all the different data sources with contact data (transactional/relationship/ad-hoc surveys, CRM data, support emails etc.), in a one-to-many relation (one contact, several responses in one or more surveys). Several types of contact databases can be included in a Hub, for example databases for customers, employees, agents, partners etc.

Surveys that are added to a hub can be linked to a Contact Database using a key (for example customerid or email). This linkage can be performed at any stage: before sample is uploaded and data collection has started, and also during data collection or even after the survey has been closed.

This provides the following benefits:

- Users can use data from the contact database in reporting and analytics on any survey that is linked, without first having to bring all the customer data into the survey as background variables.
- There is only one repository to maintain if data must be corrected, new customer data must be added etc.

Note: When creating a contact database from a survey, at least one of the variables in the survey must be a background variable. This is to ensure there is a key field available.

5.1. New User

When you open the Contact Databases page, if you already have a contact database this will be presented. If you have no databases yet, the database creation page opens .

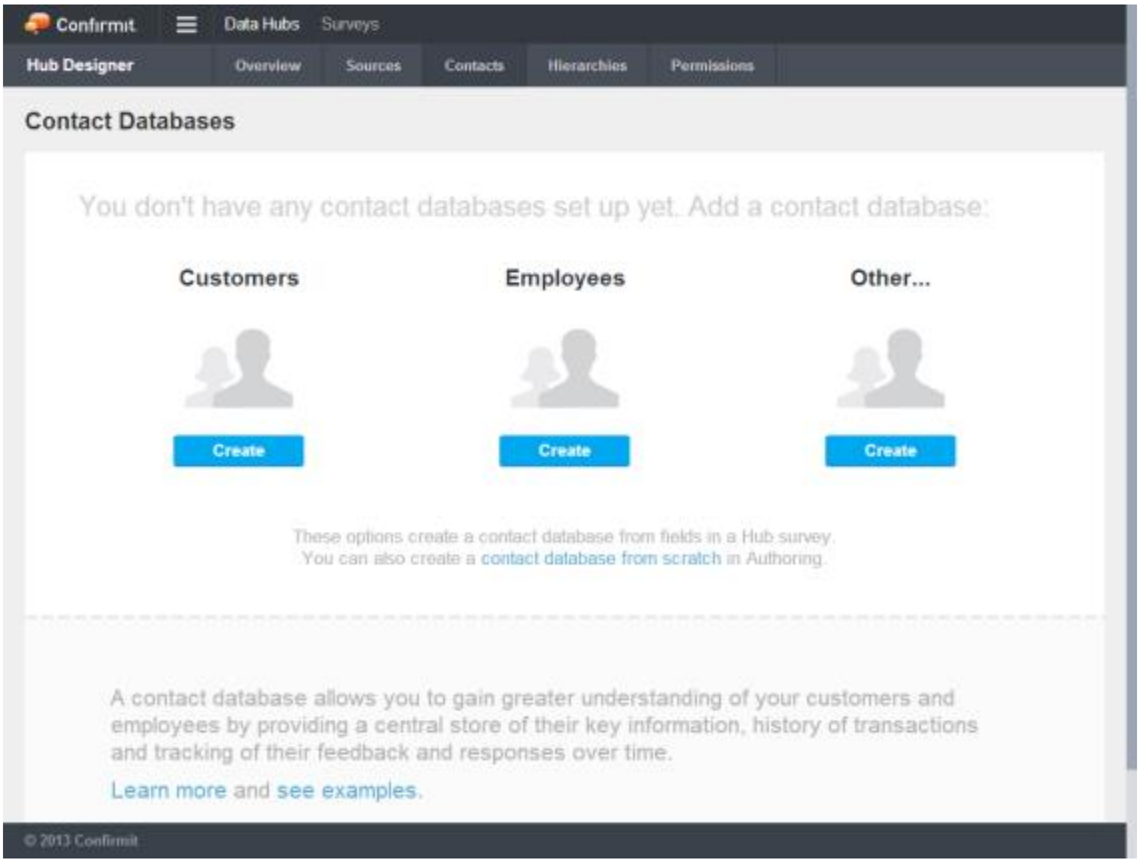

Figure 28 The Contact Databases creation page

Here you can create databases for customers, employees and "others", based on information extracted from fields in a hub survey (see How to Create a Contact Database on page 27 for more information). Note that you can also go to Confirmit Authoring and create a database from the bottom up.

5.2. Synchronizing Background Data from a Survey to a Contact Database

A Contact Database can be created and populated from background variables in a survey. Once the survey is linked and you have selected background variables to bring into the contact database, the contact database will be created and data will be continuously synchronized, automatically, from the survey to the contact database. The background variables that should be brought over to the contact database should be variables that hold data on the contact level, not those that are specific to each transaction.

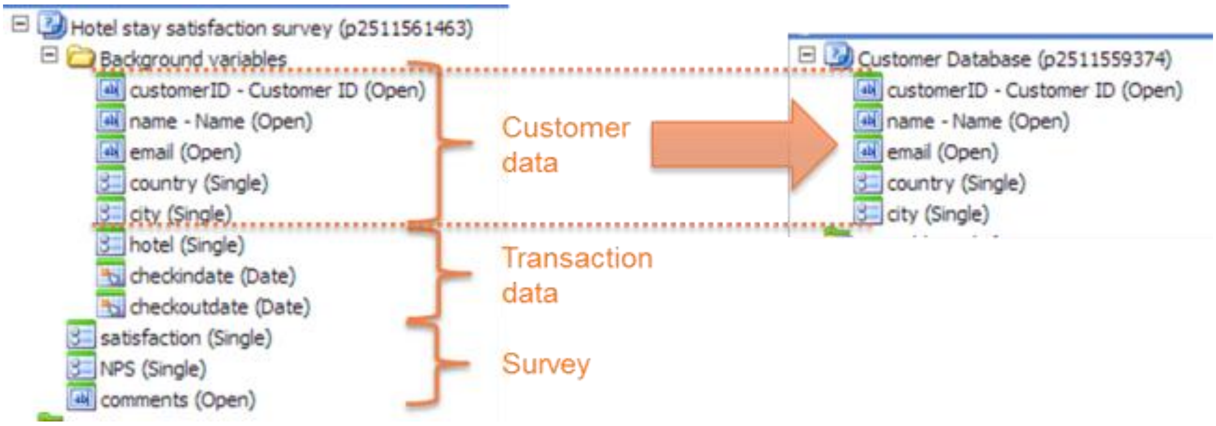

Figure 29 Synchronizing data

The synchronization will add the customer record if it doesn't already exist in the contact database. If it already exists, it will compare existing values with new values. If there are no changes, no updates will be performed on the contact database. If there are changes however, these will be recorded.

The synchronization will also add a record for this survey in an activity log.

You can have multiple surveys linked to the same contact database provided they all have the key field in the background data.

5.3. How to Create a Contact Database

1. In the Hub Designer page Main navigation bar, click **View Contact Databases**.

   If you have no databases yet, the Contact Database start page opens (see New User on page 26 for more information). In this case, click the button for the type of database you wish to create.

   If you already have one or more contact databases in your hub, then the Create New Contact Database page opens.

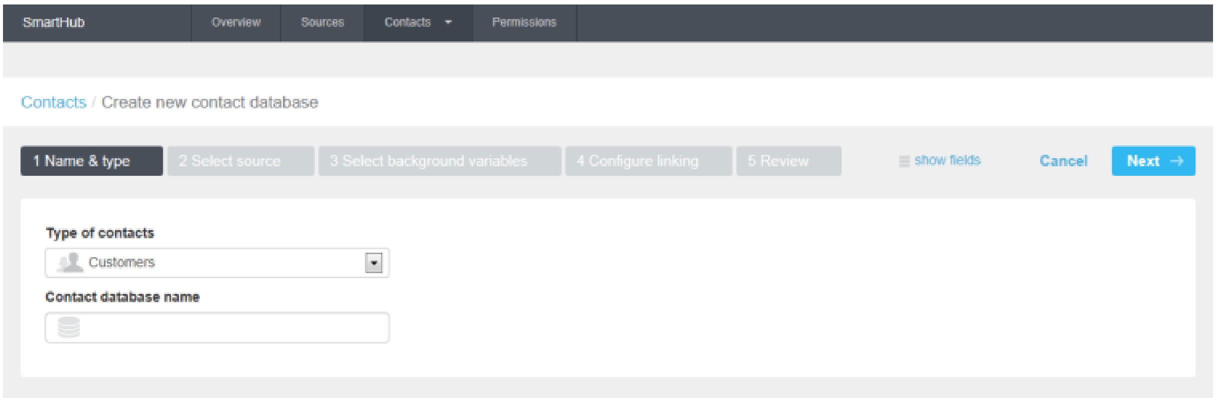

Figure 30 The Create Contact Database page

Note that you can change the type of contacts at any time by selecting a different option from the Type of Contacts drop-down.

2. Give your new database a name then click **Next**.

   The Select Source page opens. This page lists all the surveys that are currently linked into your hub.

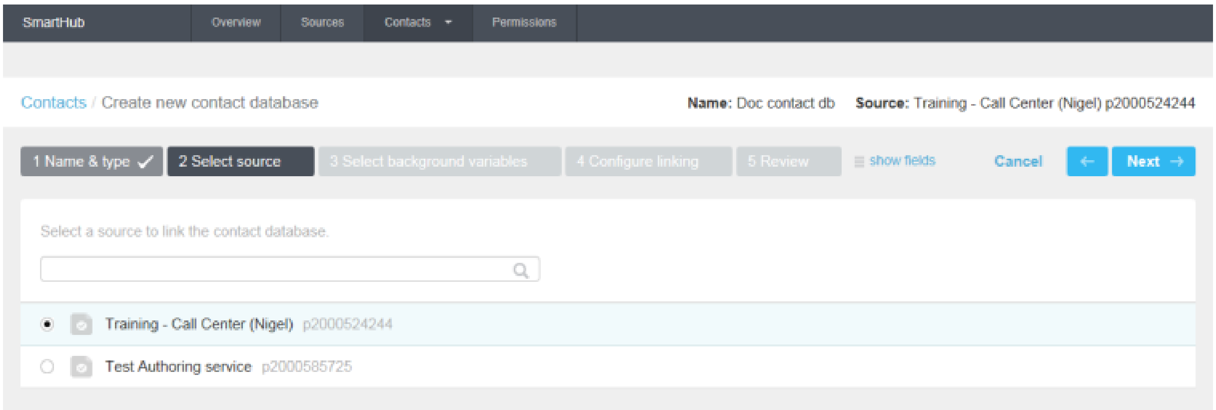

Figure 31 Selecting the source

3. Select a survey from the list then click **Next**.

   The Select Background Variables page opens. This page lists all the background variables that are included in the selected survey.

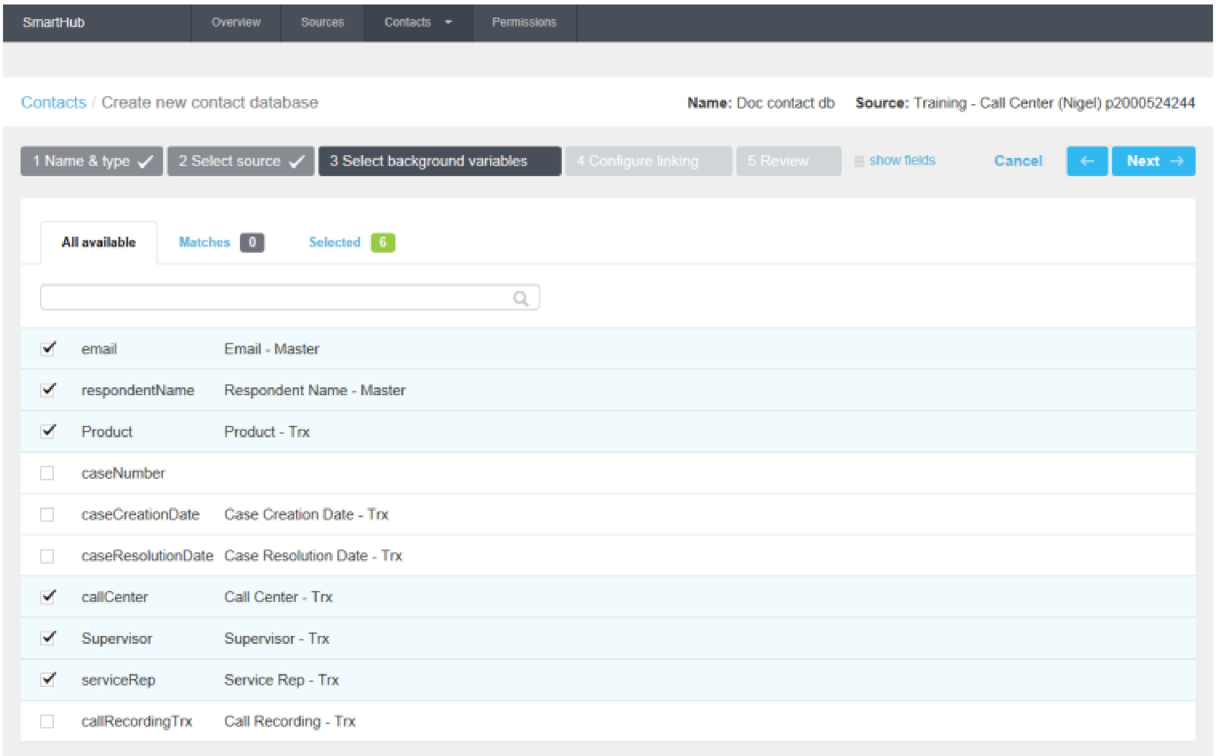

Figure 32 Selecting the background variables

4. Check the box beside each variable that you wish to include in your contact database, then click **Next**.

   The Configure linking page opens.

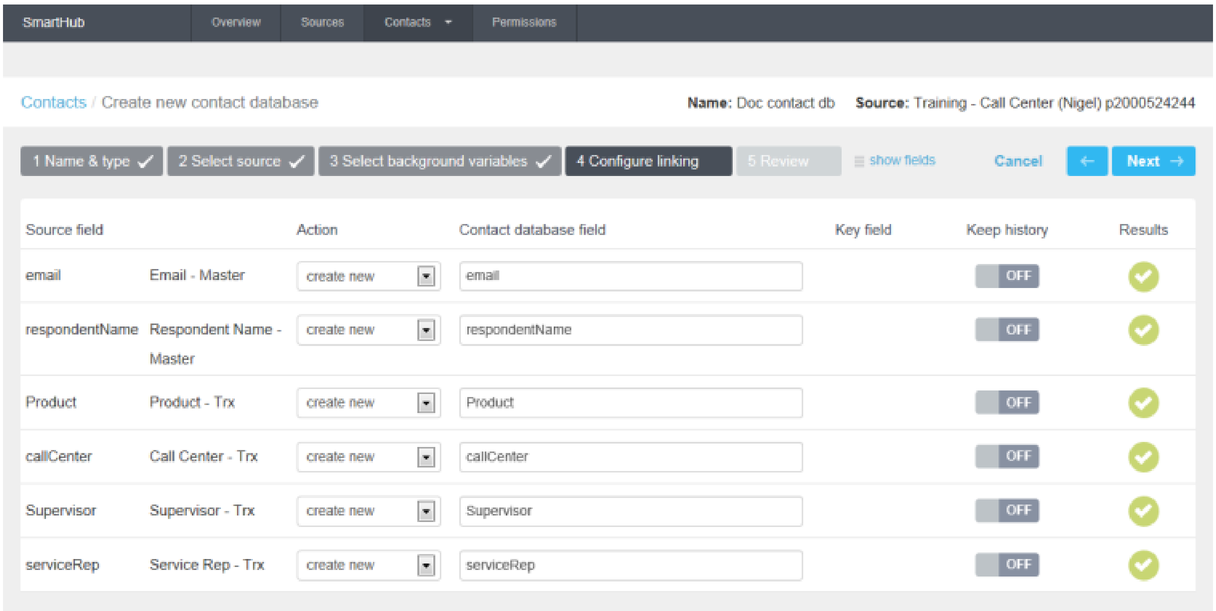

Figure 33 Configuring the linking options

5. Click in the Action field for each variable and select whether you wish to create a new field or link the variable to an existing field.
6. If you select to link a variable to an existing field, go to the Field name field for that variable and select the field you wish to link it to.

The key field for your contacts, such as a customer id or email, must be linked to the system field "contactid".

7. If you wish to keep the history for a background variable, so that when you report on variables in the contact database the reports will be based on what the value was at the time of the survey, click on the **Keep history** button for the appropriate variable to toggle it to **On**.

   Variables for which it could make sense to keep the history could for example be location, whereas for variables such as name and dateofbirth (which don't change) it will not make sense to keep the history.

8. Click **Next**.

   The Review and finish page opens.

9. Check your settings and if everything is correct, click **Save**.

The contact database is created and you are returned to the Manage ... database page.

5.4. The Contact Database Page Header Tools

The Contact Database page header bar contains two tools:

- **+ Link survey-** enables you to link an additional data source to the contact database (see How to Link an Additional Survey to a Contact Database on page 30 for more information).
- **Settings -** opens a drop-down menu enabling you to perform actions on the contact database.

  o **Edit name and type of contacts -** opens the Edit contact database overlay.

  o **Contact frequency rules** - set up rules to prevent respondents being sent excessive numbers of emails (see Contact Frequency Rules on page 33 for more information).

  o **Remove contact database -** deletes the entire contact database.

5.5. How to Link an Additional Survey to a Contact Database

1. In the Contacts tab, open the contact database that you wish to work with.

   The Manage ... database page opens.

2. Click the **+ Link survey** button.

   The Link survey page opens. This page lists all the surveys that have been added as sources in your hub.

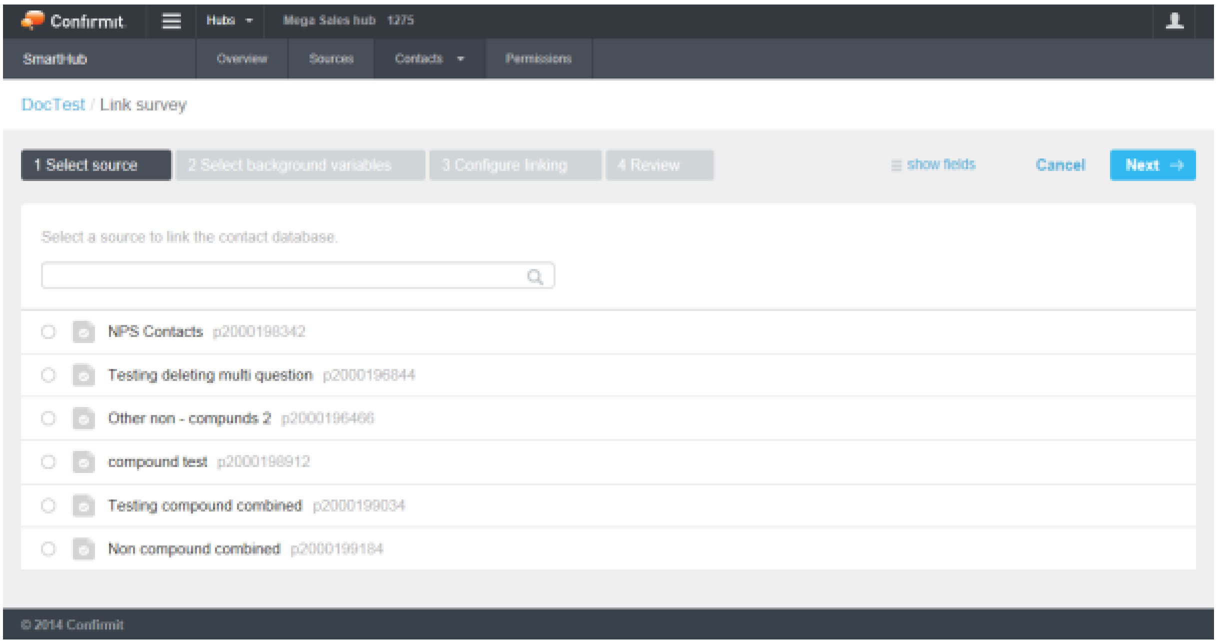

Figure 34 Example of the Link survey page for a contact database

3. Select the survey you wish to link to your contact database then click **Next**.

You can unlink a survey from a contact database at any time .

5.6. The Contact Database Action Menu

Each Contact database source has an **Action** menu that contains commands applicable to the specific source in the database. To open this menu, click the **Action** icon for the relevant source.

- **View and edit fields** - enables you to manage the fields used by the contact database (see Viewing and Editing Fields on page 31 for more information).
- **Unlink survey -** removes the source from the contact database .

5.6.1. Viewing and Editing Fields

Once you have a contact database in your hub you can view the settings and edit them at any time.

1. From the Manage ... database page, click the Action icon for a source and select **View and edit fields**.

   The Select background variables page opens.

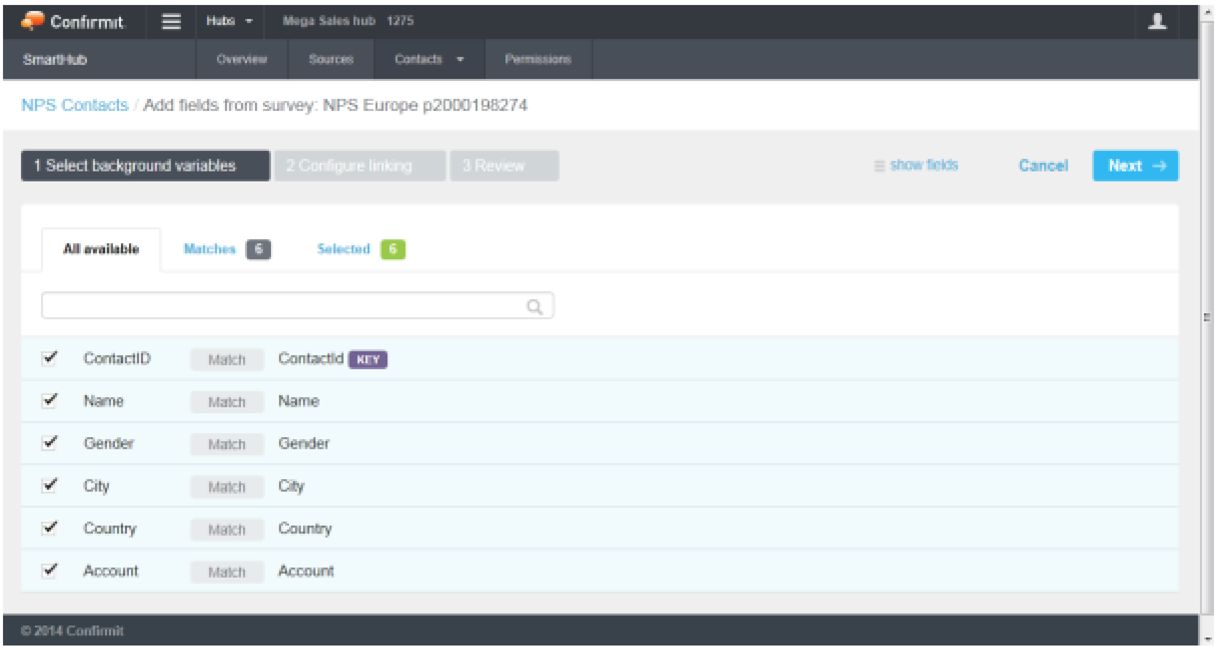

Figure 35 Example of the Select background variables page

   This page lists the background variables available in the source. Here you can select and deselect variables as required. In the event the list is extensive, use the Search field - as you type characters into the field the list is reduced to show only those variables with names starting with the characters you type.

2. Select and deselect background variables as required.
3. Click **Next**.

The Configure linking page opens.

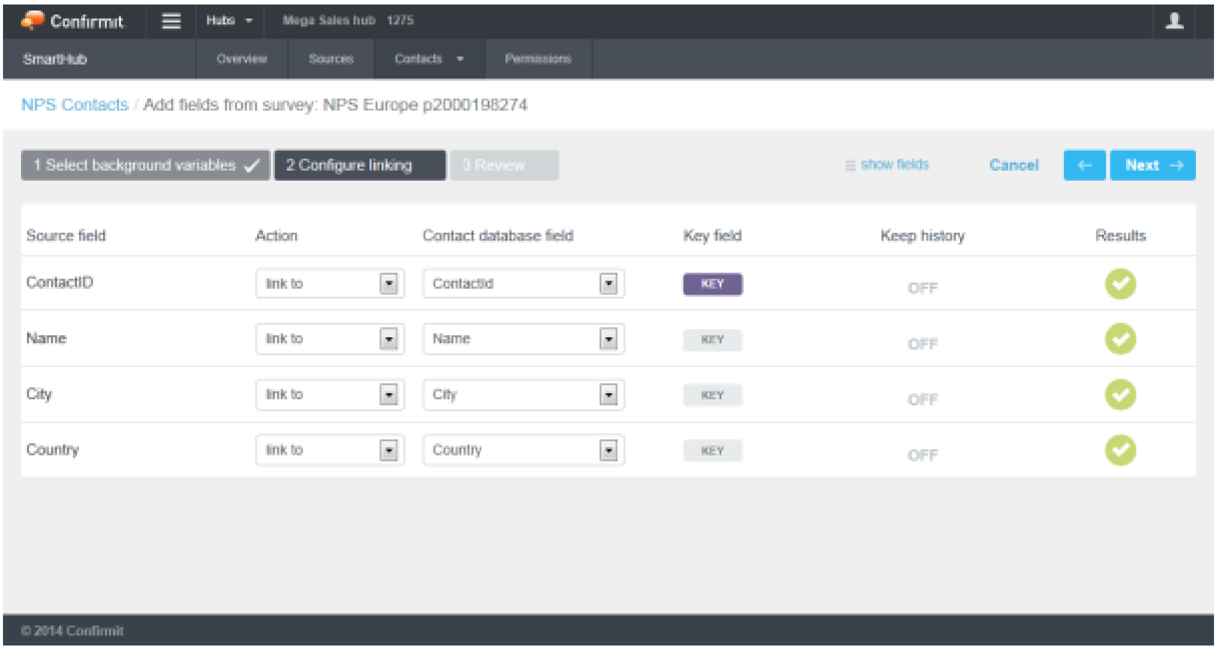

Figure 36 Example of the Configure linking page

4. For each Source field you can edit the Action and the linked Contact database field as necessary.
5. If you select to link a variable to an existing field, go to the Contact database field for that variable and select the field you wish to link it to.

Note: The key field for your contacts, such as customer id or email, must be linked to the system field "contactid".

6. If you wish to keep the history for a background variable so that the contact database will keep track of previous values for variables that change over time, click on the **Keep history** button for the appropriate variable to toggle it to **On**.

   Variables for which it could make sense to keep the history could for example be location, whereas for variables such as name and dateofbirth (which don't change) it would not make sense to keep the history.

7. Click **Next**.

   The Review and finish page opens.

8. Check your settings and if everything is correct, click **Save**.

The changes to the contact database are saved and you are returned to the Manage ... database page.

6. Contact Frequency Rules

If your respondents feel that they are being inundated with an endless shower of survey invitation emails, they will rapidly lose interest and possibly block your emails. Contact frequency rules allow you to control how often your contacts receive survey invitations. You can set up rules for individual surveys or groups of surveys to prevent email invitations being sent to respondents if they have previously received an email within a specified number of days.

Contact Frequency Rules only apply to surveys that have been added to the hub and linked to the contact database. The Rules do not apply to reminder emails if the original invitation was not stopped by the contact frequency rules.

You can set up three types of rule:

- Global rules that apply across all surveys (see How to Apply a Global Rule on page 33 for more information).
- Survey-specific rules that apply only to specific surveys (see How to Add a Survey-Specific Rule on page 34 for more information).
- You can also create groups of surveys with specific delays (see How to Create a Group on page 36 for more information).

6.1. How to Apply a Global Rule

Global rules apply to all contacts in all surveys linked to this contact database, with the exception of the contacts in surveys that have survey-specific rules set, either individually or as part of a group of surveys. To apply a global rule to a contact database:

1. In the hub, go to the contact database for which you wish to set up a contact frequency rule.
2. Select **View and manage** to open the Manage .... database page.
3. In the **Settings** menu, select **Contact Frequency Rules**.

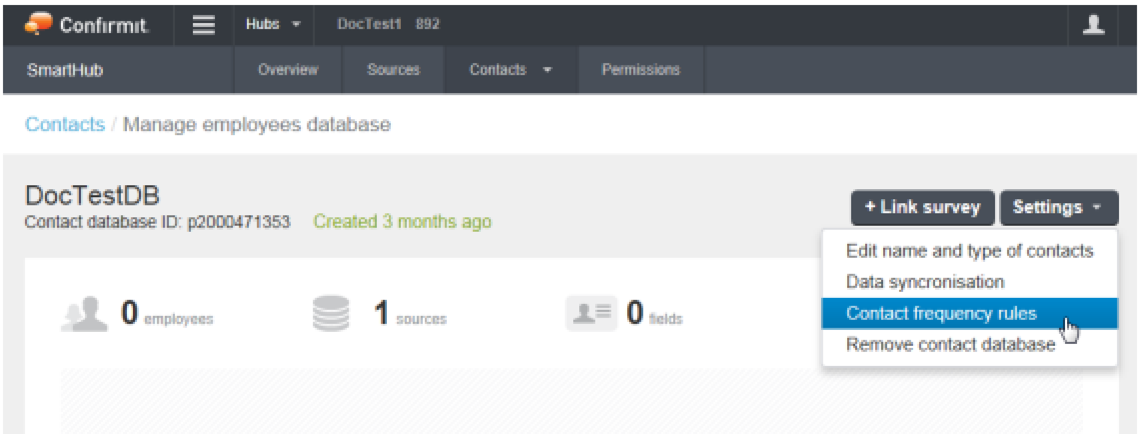

Figure 37 Opening the Contact Frequency Rules functionality

The Contact Frequency Rules page opens.

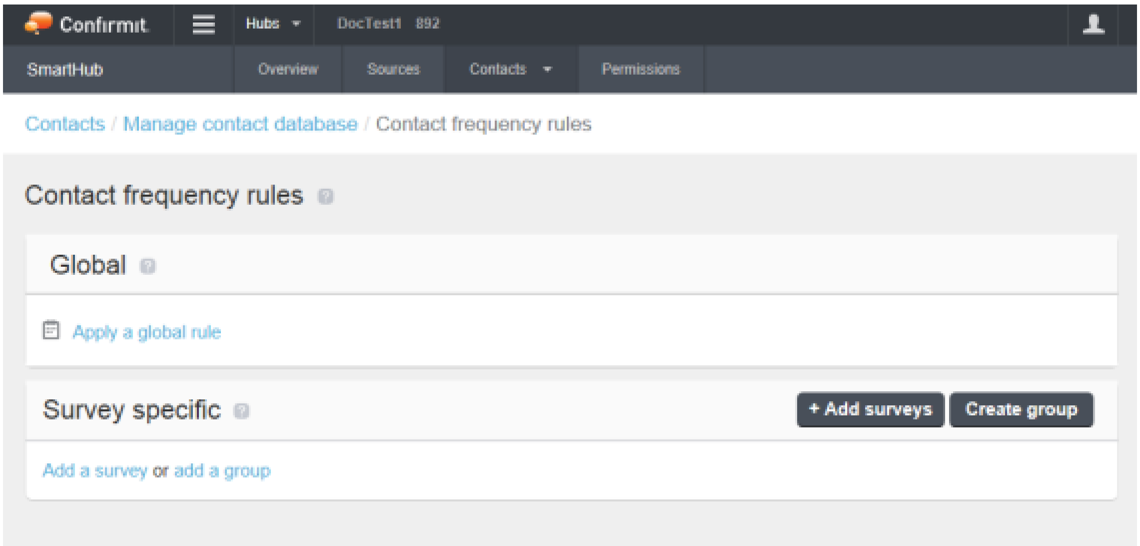

Figure 38 The Contact Frequency Rules page

4. Click **Apply a global rule**.

   The input field opens.

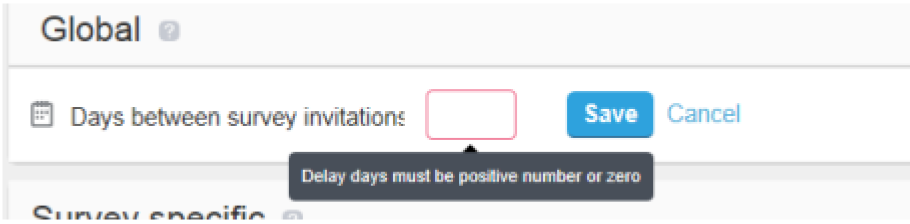

Figure 39 The delay input field and controls

5. Type the required number of "delay days" into the field.

   This must be a positive number or zero, and specifies the minimum number of days that must elapse between emails. For example, if you send emails to your contacts on a Monday and the Delay-days specified in the rule is 3, then the earliest you can send the next email to those contacts will be the Friday of that week.

6. Click **Save**.

   The rule is saved against that contact database. You can edit the delay (click the **Edit** icon) or delete the rule (click the Delete icon and confirm) at any time.

6.2. How to Add a Survey-Specific Rule

Survey-specific rules override the global rule (if one is applied), and apply only to the contacts in the surveys added. You can set rules on individual surveys (see below), or you can create a group of surveys and set a rule for the group as a whole (see How to Create a Group on page 36 for more information). To set rules on individual surveys:

1. In the hub, go to the contact database to which you wish to add a survey with a specific contact frequency rule.
2. In the **Settings** menu, select **Contact Frequency Rules**.

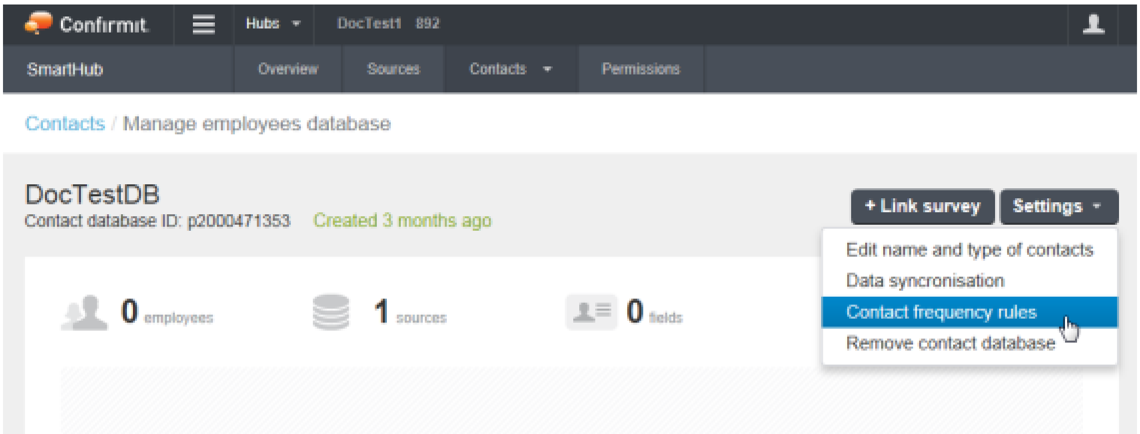

Figure 40 Opening the Contact Frequency Rules functionality

The Contact Frequency Rules page opens.

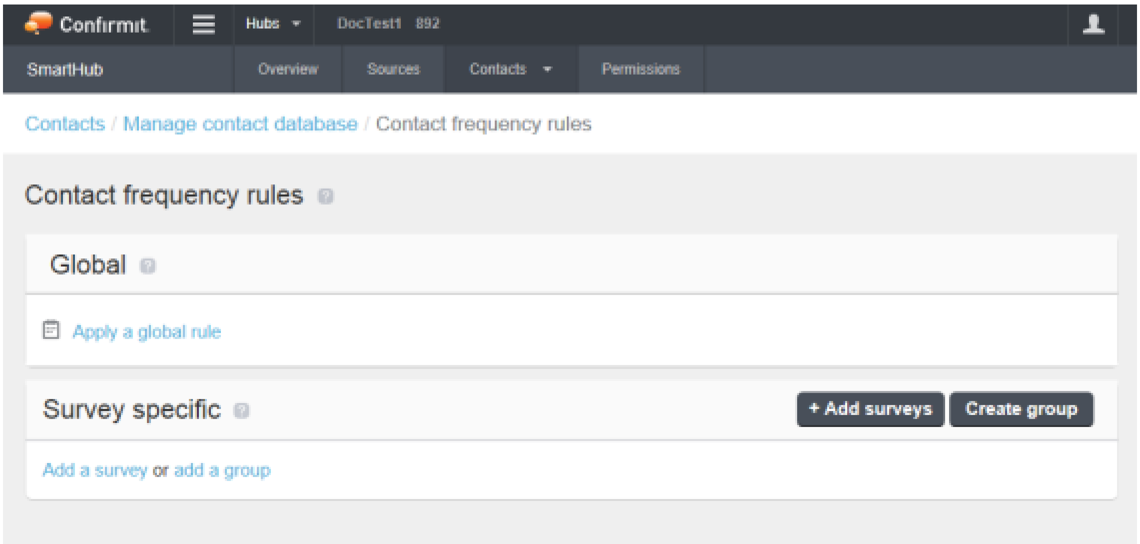

Figure 41 The Contact Frequency Rules page

3. Click **+ Add surveys**.

   The Add surveys with specific frequency rules overlay opens.

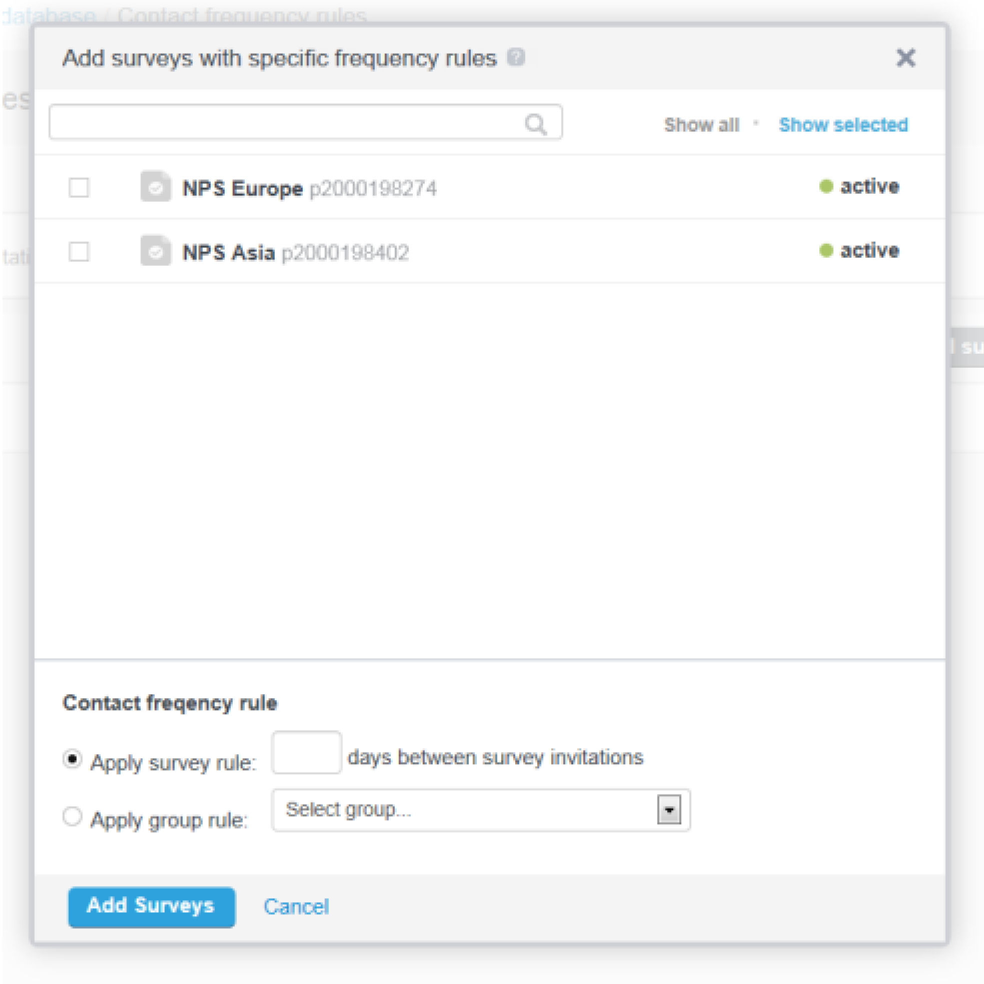

Figure 42 The Add surveys... overlay

This page lists the surveys that are included in the contact database.

4. Select the survey or surveys that you wish to apply a specific rule to.
5. Type the required number of "delay days" into the field.

   This must be a positive number or zero, and specifies the minimum number of days that must elapse between emails. For example, if you send emails to your contacts on a Monday and the Delay-days specified in the rule is 3, then the earliest you can send the next email to those contacts will be the Friday of that week.

6. Click **Add Surveys**.

   The rule is saved against that contact database in the Survey Specific part of the list, and details which survey from the contact database it applies to. You can edit the delay (click the **Edit** icon) or delete the rule (click the Delete icon and confirm) at any time.

6.3. How to Create a Group

You can create a group of surveys and set a rule for the group as a whole.

1. In the hub, go to the contact database to which you wish to create a group.
2. In the **Settings** menu, select **Contact Frequency Rules**.

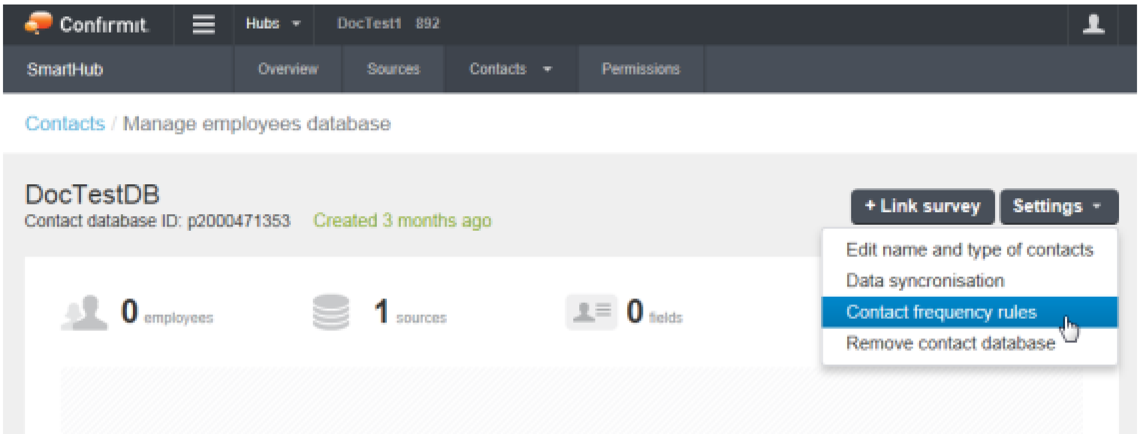

Figure 43 Opening the Contact Frequency Rules functionality

The Contact Frequency Rules page opens.

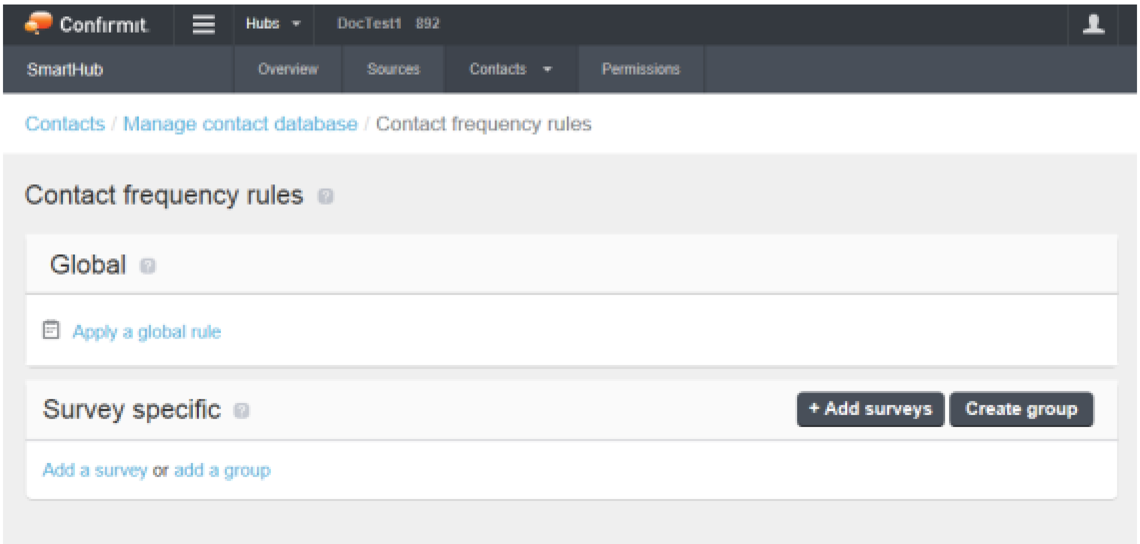

Figure 44 The Contact Frequency Rules page

3. Click **Create group**.

   The Create group overlay opens.

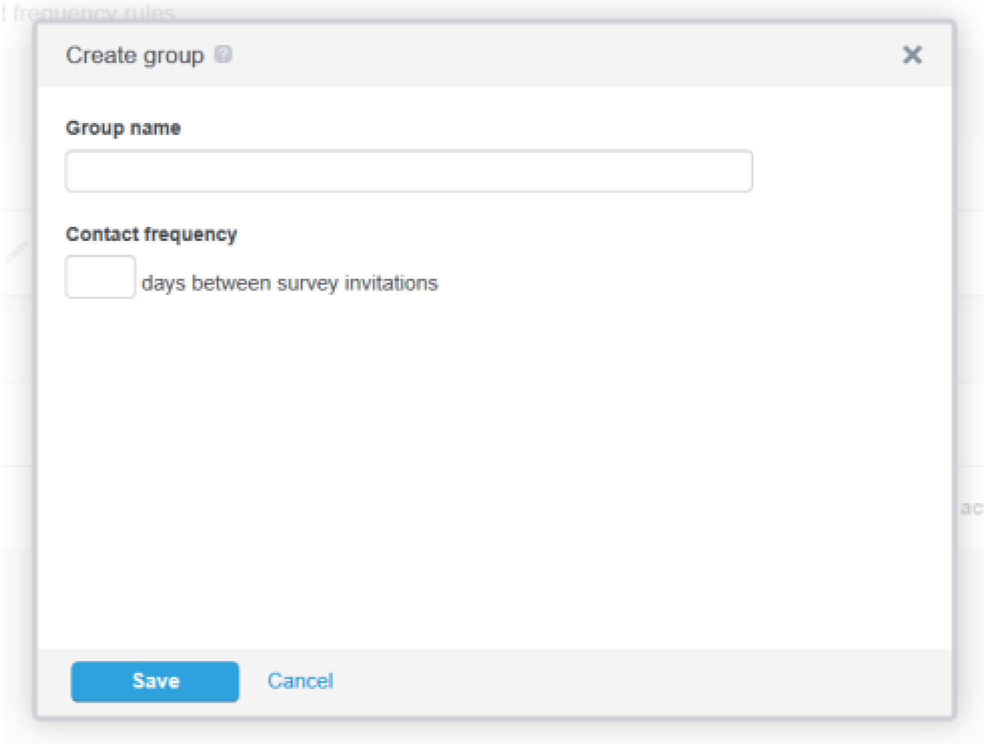

Figure 45 The Create group overlay

4. Type in a name for the new group.
5. Type the required number of "delay days" into the field.

   This must be a positive number or zero, and specifies the minimum number of days that must elapse between emails. For example, if you send emails to your contacts on a Monday and the Delay-days specified in the rule is 3, then the earliest you can send the next email to those contacts will be the Friday of that week.

6. Click **Save**.

   The group is saved against that contact database in the Survey Specific part of the list. You now need to add surveys to the group.

7. Click the **Add Surveys** icon .

   The Add surveys with specific frequency rules overlay opens.

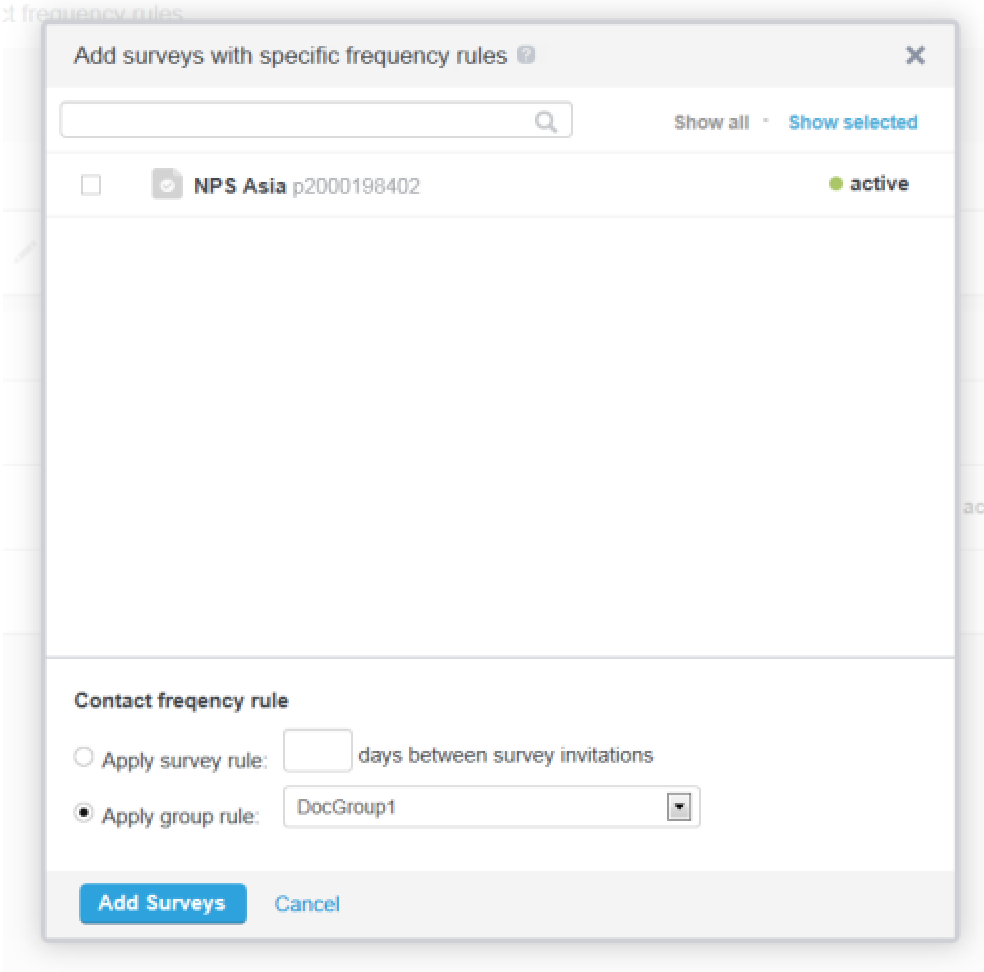

Figure 46 The Add surveys... overlay

This page lists the surveys that are included in the contact database that do not already have specific rules applied.

8. Select the surveys that you wish to add to the group.
9. Type the required number of "delay days" into the field.

   This must be a positive number or zero, and specifies the minimum number of days that must elapse between emails. For example, if you send emails to your contacts on a Monday and the Delay-days specified in the rule is 3, then the earliest you can send the next email to those contacts will be the Friday of that week.

10. If you have several groups available, select the group you wish to add the surveys to.
11. Click **Add Surveys**.

   The group is saved against that contact database in the Survey Specific part of the list, and details which surveys from the contact database it applies to. You can edit the delay (click the **Edit** icon), add further surveys to the group (click the **Add Surveys** icon) or delete the rule (click the Delete icon and confirm) at any time.

Index

V

W