



Enterprise Feedback Suite

EFS Survey Status

Project Managers Manual

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1 EFS Survey Status

If you wish to allow your staff and customers to view survey results without giving them direct access to internal project settings, the use of *EFS Survey Status* is recommendable. This separate area provides a quick overview of all key information and results, as early as during the field phase. EFS Survey Status is separate from the internal EFS Survey installation project area, does not permit any alterations and thus prevents unintentional influencing of data. Users neither require introduction to the EFS Survey software, nor are they given direct access to internal settings.

This manual explains how to integrate EFS Survey Status into your project process:

- Chapter 2, p. 6 teaches you how to create user teams and accounts.
- Chapter 3, p. 8 and 4, p. 11 introduces EFS Survey Status from the user's perspective.
- Chapter 4, p. 11 presents the central reporting and statistics functions of EFS Survey Status, as e.g. field report and online statistics. These features will be familiar for you from working in the admin area. As a project manager, you will usually work in the admin area, which offers more extensive functionalities.
- Chapter 5, p. 23 to 7, p. 29 explains how you can make additional information available to your staff and customers, as e.g. respondent data and result reports.



You can provide your staff and customers with a manual specifically tailored to their scope of rights and tasks. This manual, entitled „EFS Survey Status - Users Manual“, is available for download in the customer center.



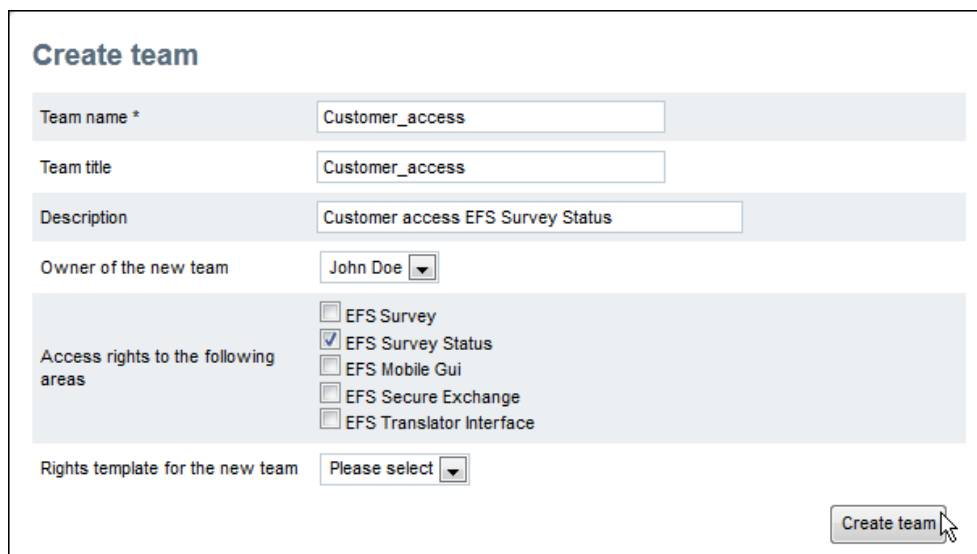
This edition of the *EFS Survey Status* manual is based on EFS 9.1. Depending on which version of EFS you use there can be minor feature differences.

2 Setting Up EFS Survey Status Access

If you wish to grant your staff or customers access to EFS Survey Status, you need a team with appropriate access rights and staff accounts for the desired candidates.

2.1 Creating a Team

Create a new team according to the instructions provided in the EFS Survey manual, Chapter 16.2.3. In the field “Access rights to the following areas”, activate the area “EFS Survey Status”: This corresponds to read rights to the “area_www” ACL right. Make sure that no other area is activated.



The screenshot shows a web form titled "Create team". It contains the following fields and options:

- Team name ***: Text input field containing "Customer_access".
- Team title**: Text input field containing "Customer_access".
- Description**: Text input field containing "Customer access EFS Survey Status".
- Owner of the new team**: Dropdown menu showing "John Doe".
- Access rights to the following areas**: A list of checkboxes:
 - EFS Survey
 - EFS Survey Status
 - EFS Mobile Gui
 - EFS Secure Exchange
 - EFS Translator Interface
- Rights template for the new team**: Dropdown menu showing "Please select".
- Create team**: A button with a mouse cursor pointing to it.

Figure 2.1 Creating a team

2.2 Granting Access to a Project

In order for the team to be able to view the data of a project, it must first be granted read rights to the desired project. To do so, locate the project in the project list and assign read rights according to the instructions provided in the EFS Survey manual, Chapter 3.5.8.

TEAM	RIGHT "READ"	RIGHT "WRITE"
Administrator	<input type="checkbox"/>	<input type="checkbox"/>
Customer_access	<input checked="" type="checkbox"/>	<input type="checkbox"/>
decontrol_privacy	<input type="checkbox"/>	<input type="checkbox"/>

Figure 2.2 Distribution of rights

Now the team members are able to view the project in the project list in EFS Survey Status and to open the drop-out statistics.

2.3 Assigning Access Rights to the Desired Data

Next you have to decide which data the members of the new team should have access to. Then, assign the respective ACL rights as described in the EFS Survey manual, Chapter 16.2.5.

You can combine the following rights:

- “read” right to “report_view_fieldrep”: Field report
- “read” right to “report_onlinestat”: Online statistics
- “read” right to “report_onlinerep”: Open-ended answers
- “read” right to “ct42partadm”: Respondent export
- “read” right to “reportlist” in combination with read right to the respective report or the respective export macro: reports created with EFS Reporting + and raw data exports. Refer also to “EFS Reporting +”, Chapter 12.5.

Also check whether the team has access rights to the **Detail view** menu: See EFS Survey manual, Chapter 12.6.1 for further information. Normally the **Detail view** in EFS Survey Status should be *completely disabled*, as it permits direct access to the data records of the participants.

2.4 Creating Customer or Staff Accounts

Create accounts for your staff or customers according to the instructions provided in the EFS Survey manual, Chapter 16.3.2. In the field “To which teams should the new staff member be added?”, select the newly created team. This team must also be the primary team for the new staff member.



Staff members who already have an access account for the EFS Survey admin area can automatically access EFS Survey Status and therefore do not need an additional account.

3 Navigating in EFS Survey Status

This Chapter introduces EFS Survey Status from the user's perspective. The basic functions, as e.g. login and change of language, have been designed parallel to EFS Survey, therefore they will already be familiar for you: In this case, skip the first Chapters and go directly to Chapter 3.3, p. 9.

3.1 Logging in

The login to EFS Survey Status is performed via the URL of the respective EFS Survey installation, with the addition of /report/

Figure 3.1 Login

3.2 Orienting Yourself

After successful authentication you enter EFS Survey Status.

Figure 3.2 Inside EFS Survey Status

Navigation bar

The navigation bar offers access to various menus and features:

- **Logout:** Click this link to log out.
- **Change password:** Click on this link to change your password.
- **English/German/French:** By clicking this link, you can change the language of the user interface. If you update the current page or open another page, the language will change.

On the right side of the navigation bar the date and the name of the logged-in user are displayed.

Content area

In the content area you can find

- a clickable breadcrumb path.
- the current menu. The figure above shows the list of projects, which will be introduced in detail in Chapter 3.3, p. 9.

Task bar

The bottom task bar provides two more functions:

- **Documentation (PDF):** Provides a PDF version of the EFS Survey Status documentation.
- **Print:** Opens the print dialog of your PC and allows you to print the currently displayed page.

3.3 The Project List

In the project list, you can find all survey projects of the EFS Survey installation for which you have reading authorization, except archived projects.

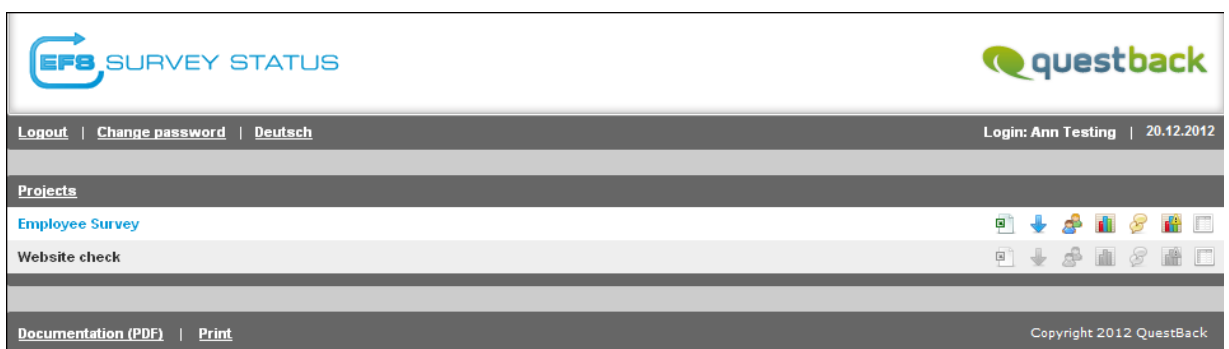


Figure 3.3 List of the projects for which staff member Ann Testing has read rights

From EFS 8, a search function is available above the list.

If a project appears in black and the links and icons cannot be clicked on (e.g. the “Website check” project shown above), the respective project will not yet contain any data.



If a project to which you are supposed to have access is missing from the list, the corresponding read rights for this project must be set up. Please contact the responsible project manager or the QuestBack support.

3.4 Accessing the Reporting Functions of a Project

Starting from the project list, there are two possible ways to enter the reporting functions of a specific project:

- Via the icons in the right-hand column, you can directly access the reporting functions (Figure 3.3).
- By clicking on the title of the appropriate project, you can open the overview menu shown in Figure 3.4. It offers access to the various reporting functions.

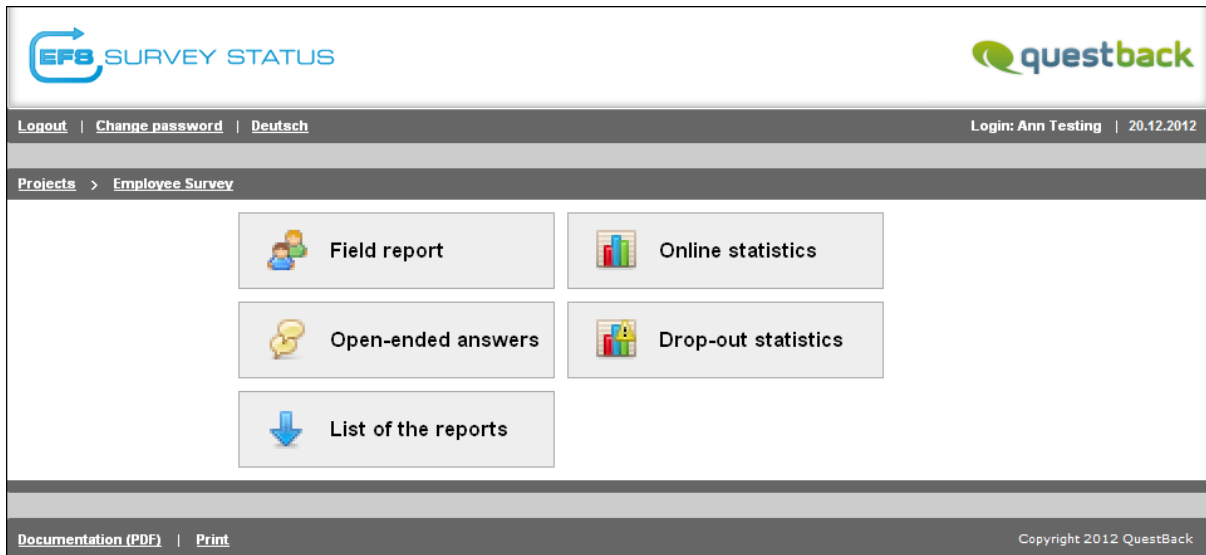


Figure 3.4 Overview of the various reporting functions of a project

4 The Reporting and Statistics Features

For each project, the following reporting features are offered:

- the **Field report** with additional features, see Chapter 4.1, p. 11.
- the **Drop-out statistics** show how often and on which questionnaire pages participants dropped out. See Chapter 4.2, p. 20.
- As early as during the field phase, the **Online statistics** show you the survey data which have been collected so far. See Chapter 4.3, p. 21.
- In the **Open-ended answers** menu you can find the answers to open-ended questions given by the survey participants in a table. See Chapter 4.4, p. 22.

Optionally, you can use the following additional functions, which will be introduced in detail in the following Chapters:

- The **Respondent export** menu contains the so called *respondents*, i.e. all those participants who actually participated in a survey. See Chapter 5, p. 23.
- In the **List of the reports** menu you can download automatically-generated export data records. See Chapter 6, p. 25.
- Furthermore, you can make result reports available in the **List of the reports** menu. See Chapter 7, p. 29.

4.1 Field Report

The Field report provides information on the essential characteristic data of a study. It contains

- statistical information, broken down by gross and net sample.
- access statistics listing, for example, the time of days with the most accesses and the average number of participants per day and week.
- drop-out statistics which show you on which questionnaire page most participants dropped out. If the drop-out rate is too high, you can react by changing the questionnaire dramaturgy. Errors, for example in filter setting, can also be detected by analyzing the drop-out statistics.
- quota statistics.

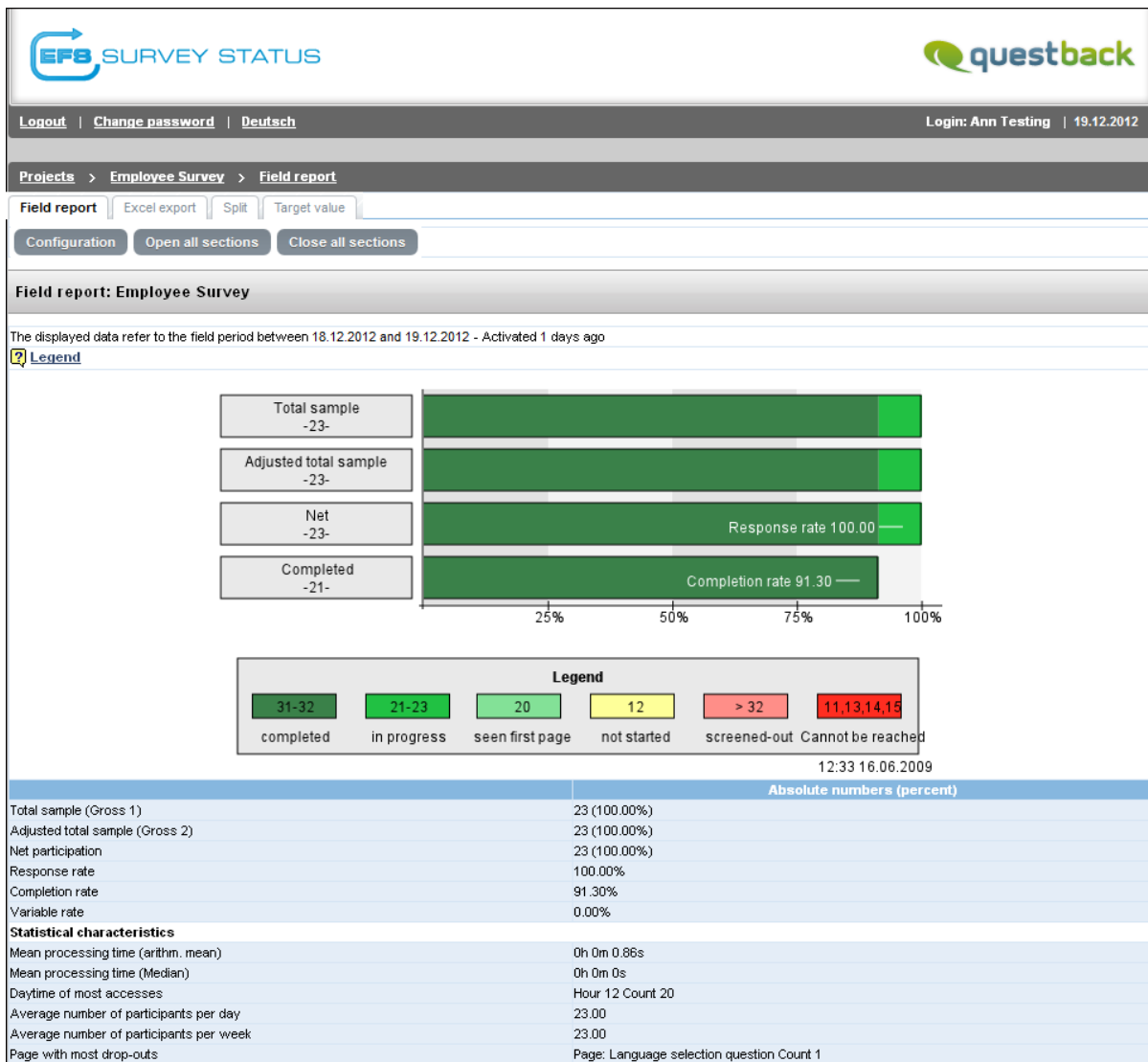


Figure 4.1 An extract of the field report in EFS Survey Status

Below you can find:

- information on the diagram, see Chapter 4.1.1, p. 13.
- an explanation of the key statistics, see Chapter 4.1.2, p. 13.
- an overview of the EFS disposition codes, see Chapter 4.1.3, p. 16.

Several additional features help you to analyse and process the data:

- Button **Configuration**: If necessary, you can restrict the field report to disposition codes or to a specific characteristics of a selected variable. See Chapter 4.1.5, p. 18.
- Tab **Excel export**: You can export the field report as an MS Excel file to pass the field report data on to customers or to create diagrams from the data, e.g. using MS Excel. See Chapter 4.1.7, p. 19.
- Tab **Split**: You can split the field report, see Chapter 4.1.6, p. 19.
- Tab **Target value**: On this tab, you can define a target value for the project, which will be shown in the diagram and thus allows you to visually monitor your success.

4.1.1 Diagram

The diagram belonging to the field report gives you a quick overview of the progress made in the field phase.

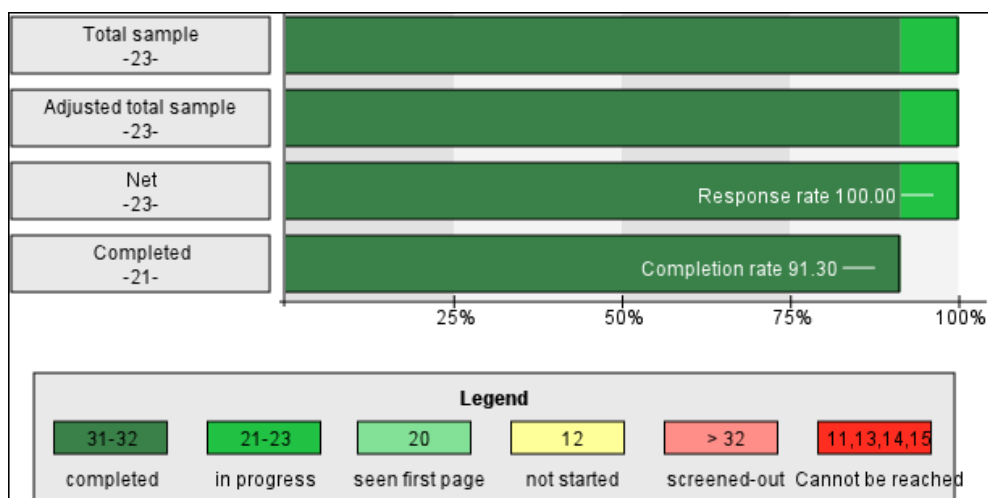


Figure 4.2 Diagram representing the key data

The highlight colors indicate the survey participants' disposition codes (see Chapter 4.1.3, p. 16).

4.1.2 The Field Report in Detail

The following table illustrates the data used in the field report. See the following chapter for a breakdown of the disposition codes.

Section	Line	Description	Disposition codes	
			Anonymous projects	Personalised projects
Total sample: gross 1	Total	Population (e.g. all cases in the list of participants or the number of pop-ups) Please note the instructions regarding observance of disposition code 20 in Chapter 4.1.4, p. 18.	(20),21,22,31,36,37	11, 14, 15, 12, 21, 22, 23, 31, 32, 35, 36, 37, 41
	Not yet invited	Not yet invited participants. These include the sample-neutral drop-outs counted in the total sample.		11
	E-mail could not be delivered	Participants to whom e-mail could not be delivered. These include the sample-neutral drop-outs also counted in the total sample.		14
	Cannot be reached	Participants marked manually as not available. These include the sample-neutral drop-outs also counted in the total sample.		15
	Rejected at login (quota closed)	Participants rejected at login. These include the sample-neutral drop-outs also counted in the total sample.		35

Table 4.1 Meaning of the terms used in the field report

(Cont.)Section	Line	Description	Disposition codes	
	Rejected (quota closed)	Rejected participants. These include the sample-neutral drop-outs also counted in the total sample.	36	36
	Screened out	Screened out participants. These include the sample-neutral drop-outs also counted in the total sample.	37	37
	Quota closed	Participants filtered out prior to survey commencement These include the sample-neutral drop-outs also counted in the total sample.		41
	Drop-outs neutral to the sample	Errors in the address list, addresses that do not exist (anymore), screened-out participants (incl. those screened out by quotas) The value for sample-neutral drop-outs is the sum of participants listed in the rows in this regard. These participants are counted in the overall sample but are not included in the adjusted overall sample.	36, 37	11, 14, 15, 35, 36, 37, 41
Adjusted overall sample: gross 2	Total	Gross 2 equals gross 1 minus the sample-neutral drop-outs explained above. Please note the instructions regarding observance of disposition code 20 in Chapter 4.1.4, p. 18.	(20), 21,22,31	12,21,22,23,31, 32
	Active	Participants with disposition code 12. These are counted in the adjusted overall sample.		12
	Not yet started	Participants with disposition code 20 if the project is configured accordingly. These are counted in the adjusted overall sample. Please note the instructions regarding observance of disposition code 20 in Chapter 4.1.4, p. 18.	used-defined 20	
	Drop-outs relevant to the sample	This includes participants who are still unknown or have not begun the survey. This value is the sum of the participants listed in the two rows above with disposition codes 12 and 20 (if set accordingly). These participants are counted in the overall sample but are not included in net participation.	20	12
Net participation	Total	The net sample includes the completed interviews as well as participants who are currently active or have interrupted the survey. Please note the instructions regarding observance of disposition code 20 in Chapter 4.1.4, p. 18.	(20), 21, 22, 31	21, 22, 23, 31, 32
	Completed	Participants with disposition code 31 and 32. These are counted in net participation.	31	31, 32

Table 4.1 Meaning of the terms used in the field report

(Cont.)Section	Line	Description	Disposition codes	
	Currently responding	Participants with disposition code 21 and 23. These are counted in net participation.	21	21, 23
	Suspended	Participants with disposition code 22. These are counted in net participation.	22	22
	Not yet started	Participants with disposition code 20 if the project is configured accordingly. Please note the instructions regarding observance of disposition code 20 in Chapter 4.1.4, p. 18.	used-defined 20	
Key statistics	Response rate	<ul style="list-style-type: none"> Anonymous projects: With pop-up surveys, the number of pop-up call-ups is defined in a manner comparable with the number of invitations in the case of personalized questionnaires. With banner surveys and entry via a link, it is not recommended, from a methodological point of view, to calculate a response rate. Personalized projects: Percentage share of persons actually participating in the survey among those who were asked to participate. 	Net / gross 2	Net / gross 2
Key statistics	Completion rate	<p>The completion rate equals the share of completed interviews in the adjusted sample.</p> <ul style="list-style-type: none"> Anonymous projects: Ratio of the number of completely finished interviews to the number of persons who have received a pop-up window to the survey or clicked on a banner or the link to the survey (gross 2). Personalized projects: Ratio of the number of completely finished interviews to the number of participants who have been invited and could be reached (gross 2). 	$31 / \text{gross } 2 * 100$	$31+32 / \text{gross } 2 * 100$
Key statistics	Variable rate	The variable rate is calculated from the number of those interviews which have been completed up to the questionnaire page X that is marked with a variable page marker. See EFS Survey manual, Chapter 12.3.8 for detailed information.	Number of participants up to page X / gross 2	Number of participants up to page X / gross 2
Key statistics	Participants per hour	<p>The number of participants per hour is indicated</p> <ul style="list-style-type: none"> for all participants irrespective of their disposition code. additionally for all participants who have fully completed the survey. 	All and 31, 32	All and 31, 32

Table 4.1 Meaning of the terms used in the field report

(Cont.)Section	Line	Description	Disposition codes	
Key statistics	Participants per day	The number of participants per day is indicated <ul style="list-style-type: none"> • for all participants irrespective of their disposition code. • additionally for all participants who have fully completed the survey. 	All and 31, 32	All and 31, 32
Key statistics	Participants per week	The number of participants per week is indicated <ul style="list-style-type: none"> • for all participants irrespective of their disposition code. • additionally for all participants who have fully completed the survey. 	All and 31, 32	All and 31, 32
Key statistics	Mean processing time	The mean processing time is the mean value of the processing time for all those respondents who have completed the questionnaire without interruption; i. e. it is the sum of the processing times (<i>variable duration</i> , see EFS Survey manual, Table 13.2) for all respondents with disposition code 31, divided by the number of those respondents. Participants who interrupted the survey and resumed it at a later stage (disposition code 32) will not be included.	31	31,32

Table 4.1 Meaning of the terms used in the field report

4.1.3 Disposition Codes

Every participant in a field has a so-called disposition code which describes their status in the field. This records, for example, whether participants have already been invited and whether they have already begun the survey or completed it. The field statistics, which builds on these statuses, gives you extensive information on the status of your field, i.e. your survey, at any time.

The disposition codes have two digits. The areas are defined as follows:

- 10s: before the survey
- 20s: during the survey
- 30s: after the survey

The disposition codes are mutually exclusive: Any person can have only one disposition code at any given time. Therefore, the status variable can only assume one of the above characteristics at a time. The majority of disposition codes is assigned automatically and changed depending on the progress of the survey.

The following table lists the EFS disposition codes.

Disposition code	Status	Comment
11	Not yet invited	
12	Active	The link has not yet been used.

Table 4.2 Disposition codes

(Cont.)Disposition code	Status	Comment
13	Inactive	Only on EFS Panel installations: If you change the panel status of panelists to “inactive”, their disposition code will be changed to 13 in all samples in which they had disposition code 11 or 12 so far (i.e. they haven’t participated yet). Thus, the panelists can not start any new surveys, even if they have already been invited.
14	E-mail could not be delivered	Assigned automatically if EFS is not able to connect to the mail server. Four attempts are made to connect and deliver the mail.
15	Cannot be reached	<p>This code is used in order to mark participants that cannot be reached. Usually the project manager is notified that mails could not be delivered by a means outside of the EFS Survey system:</p> <ul style="list-style-type: none"> • through messages that take place offline (for example by post or telephone). • through out-of-office mails, messages regarding a full mailbox, messages from the postmaster that an e-mail address no longer exists or that a further delivery attempt will follow, etc. Because these e-mails are directed at the sender of an invitation or follow a return path, they can not be documented by the EFS Survey software. <p>In all of these cases the assignment of the code must be done manually according to the instructions in the EFS Survey manual, Chapter 10.2.5. You can use the trim participants function, described in the EFS Survey manual in Chapter 11.2.13, to assist you.</p>
20	Not yet started	The first page of an anonymous project has been called or delivered (pop-up window) and cancelled. To find out what evaluation options this special disposition code involves, please see Chapter 4.1.4, p. 18.
21	Currently responding	<p>The participant is answering the survey at the moment.</p> <ul style="list-style-type: none"> • In anonymous projects, this disposition code is assigned if at least the first page has been viewed and confirmed by clicking on the Submit button. • In all other project types, this disposition code is assigned as soon as the first page has been opened.
22	Suspended	At least 30 minutes of inactivity have been observed.
23	Resumed	The survey has been resumed after an interruption.
31	Completed	The survey has been successfully completed.
32	Completed after break	The survey was interrupted during its course, but has been resumed and successfully completed.
35	Rejected at login (quota closed)	Is set for respondents in personalized projects who want to use the link from the invitation mail to log into the survey after a quota has been closed.
36	Rejected (quota closed)	Status 36 and 37 are set in a project with quotas when an intermediate final page has been reached. The survey administrator can use these codes to mark respondents as rejected (i.e. screened out by quota; there are already enough participants with the respective features) or screened out (= unsuitable). The status to be set is manually specified by the administrator at the intermediate final page.

Table 4.2 Disposition codes

(Cont.)Disposition code	Status	Comment
37	Screened out	Status 36 and 37 are set in a project with quotas when an intermediate final page has been reached. The survey administrator can use these codes to mark respondents as rejected (i.e. screened out by quota; there are already enough participants with the respective features) or screened out (= unsuitable). The status to be set is manually specified by the administrator at the intermediate final page.
41	Filtered out before the beginning of the survey, because quota is already closed.	If a quota is full, this status will be assigned to all participants, who match the quota condition, but nevertheless have not started with the survey yet. If one of these participants tries to log in, then he will be rejected and the disposition code will be set to 35.

Table 4.2 Disposition codes

4.1.4 Allocating Code 20 to either Gross or Net

For anonymous surveys, disposition code 20 will be set when the first page is invoked. Depending on the type of survey, it may make sense in an evaluation to allocate participants with this disposition code either into gross or net:

- In the case of pop-up surveys using n-viz procedures, it makes sense to classify participants with this disposition code into gross, because the survey is shown to them automatically.
- In the case of banner surveys, participants with disposition code 20 would be allocated into net because the respondents actively invoke the survey.

You can decide for yourself how participants with disposition code 20 will be allocated in a field report. To do so, switch to the **Project properties->Survey options->Features for internal organization** menu in the admin area, and select the desired option from the field labeled “This setting allows you to control how disposition code 20 is to be allocated in the field report”.

4.1.5 Restricting the Field Report

The field report can be limited to specific disposition codes or variable characteristics. The following options are available:

- all disposition codes.
- project variables and URL parameters. Exception: Variables of text question types (141, 142, 143, 144, 363), user-defined question variables(question type 911) and user-defined variables cannot be used for restriction purposes.

Proceed as follows:

1. Click the **Configuration** button.
2. In the upper section disable, if necessary, the disposition codes not to be used to restrict the basis.
3. If you wish to make restrictions using a project variable, select the latter and confirm with **Continue**.
4. In the next step select the desired variable characteristic.
5. **Confirm** again. The restricted field report is issued.

In order to undo the field report restriction, switch back to the **Configuration** dialog, select “Delete current restriction” and confirm with **Continue**.



Read permission for `config_fieldreport` is required for accessing the configuration options.

4.1.6 Splitting the Field Report

You can split the field report by means of a specific variable.

- The following variables are available for all project types: project variables (`v_000n`), URL parameters (`c_000n`), user-defined variables (`p_000n`), quota IDs (quota), language ID (language) and outmode (outmode).
- Open-ended answers can be used as split variables. But if you do so, please mind that due to the high number of differing entries, it may not be possible to display the split data properly.
- Personalized surveys: “Select box” and “radio button” participant variables may be used, provided that answer categories have been defined.
- Employee surveys: To protect the privacy of participants, participant variables cannot be used for splitting. The Org Processor variables in Employee surveys (`org_allocation_x`, `org_code_x`, `org_function_x`) are not available for splitting either: The Org Processor provides a comfortable overview on the return data of individual units.
- Multi-source feedbacks: To protect the privacy of participants, participant variables cannot be used for splitting. Various MSF-specific variables are available, including role and feedback phase).

Proceed as follows: Switch to the **Split** tab, and select the desired split variable from the drop-down list. After that, confirm by clicking on **Save**. The data in the field report will now be split based on the variable you chose. You can export the data as an MS Excel file and process them externally (e.g. create diagrams using MS Excel).



Read permission for `stat_split` is required for accessing the split options.

4.1.7 Exporting the Field Report

You can download the field report in MS Excel file format, e. g. in order to pass the data on to your customers or to plot charts or graphs. This is particularly useful if you need the data of a field report that is restricted by configuration or has been split using the split function (see previous chapters): The field report will be exported in its current configuration.

In order to initiate the export, click on the **Excel export** tab and save the excel file to your computer. The excel file has an appealing layout, i.e. if necessary, you can directly pass on or present your data, if necessary.

	Absolute Zahlen	Prozent
Gesamtsample (Brutto 1)	2	100,00%
Bereinigtes Gesamtsample (Brutto 2)	2	100,00%
Nettobeteiligung	2	100,00%
Ausschöpfungsquote		100,00%
Beendigungsquote		100,00%
Variable Quote		0,00%
Statistische Kennzahlen		
Mittlere Bearbeitungszeit (arithm. Mittel)	0h 0m 30s	
Mittlere Bearbeitungszeit (Median)	0h 0m 30s	

Figure 4.3 Excel export of the field report



If an Excel file is opened on a computer running with Windows 7 and Excel 2007, depending on the circumstances, a message may be displayed which notifies you that the file is corrupted. This problem is caused by an extension provided by a third-party supplier. Until further notice, please proceed as follows: Save the file locally. Then, open the saved file, allowing Excel to repair it. Finally, save the file again.

4.2 Drop-out Statistics

The drop-out statistics shows how often and on which questionnaire pages participants dropped out.

Page:	Drop-outs	proceeded to page
Language selection question	1 (4.35%)	23 (100.00%)
Welcome	(0.00%)	22 (95.65%)
Work situation	(0.00%)	22 (95.65%)
Team	(0.00%)	22 (95.65%)
Department	(0.00%)	22 (95.65%)
Area of responsibility	1 (4.35%)	22 (95.65%)
Final page	(0.00%)	21 (91.30%)
Total	Break off	2 (8.70%)
Total	Completed	21 (91.30%)
Total	Completed after break	(0.00%)

Figure 4.4 The drop-out statistics

Knowing how many participants dropped out and on which page helps to identify problems. E.g. if the questionnaire is too long, more participants than normal will drop

out. Many drop-outs on a specific page may be an effect of too restrictive filter conditions.

4.3 Online Statistics

As early as during the field phase, the online statistics give you an overview of the survey data gathered up to that point.

In a first step, you must specify which project data the statistics are supposed to cover:

- By ticking the checkboxes for a specific question or ticking the “Tick all checkboxes” checkbox, you can specify whether you want to view all survey results, only a selection or the results for a specific question.
- If you tick the “Show variable names and types” checkbox, the online statistics will additionally display the names of variables, question types and labels.

The screenshot displays the 'Online statistics' configuration page in QuestBack. At the top, there are logos for 'EF8 SURVEY STATUS' and 'questback'. Below the logos, there are navigation links: 'Logout', 'Change password', and 'Deutsch'. The user is logged in as 'Ann Testing' on '19.12.2012'. The breadcrumb trail shows 'Projects > Employee Survey > Online statistics'. The main heading is 'Online statistics'. A warning message states: 'Please select the variables to be included in the statistics first.' There are two checkboxes: 'Tick all checkboxes' and 'Show variable names and types'. A language dropdown is set to 'English (en_US) (Standard)'. Below this, there is a list of survey questions with checkboxes for selection:

Page/Question	Selected
3 Page: Language selection question Question: Sprachauswahlfrage (111)	<input type="checkbox"/>
4 Page: Welcome Question: Arbeitssituation (311)	<input type="checkbox"/>
6 Page: Team Question: Team (311)	<input type="checkbox"/>
7 Page: Department Question: Department (111)	<input checked="" type="checkbox"/>
8 Page: Area of responsibility	<input type="checkbox"/>
9 Page: Final page	<input type="checkbox"/>
All	<input type="checkbox"/>

At the bottom, there are links for 'Documentation (PDF)' and 'Print', and a copyright notice for 'Copyright 2012 QuestBack'.

Figure 4.5 Selection of the representation method

The online statistics will display the following information for the selected questions:

- the number of persons who have chosen a characteristic.
- the percentage of respondents is represented in numbers and as a bar diagram.
- the total number of persons who have given a valid answer to a question.

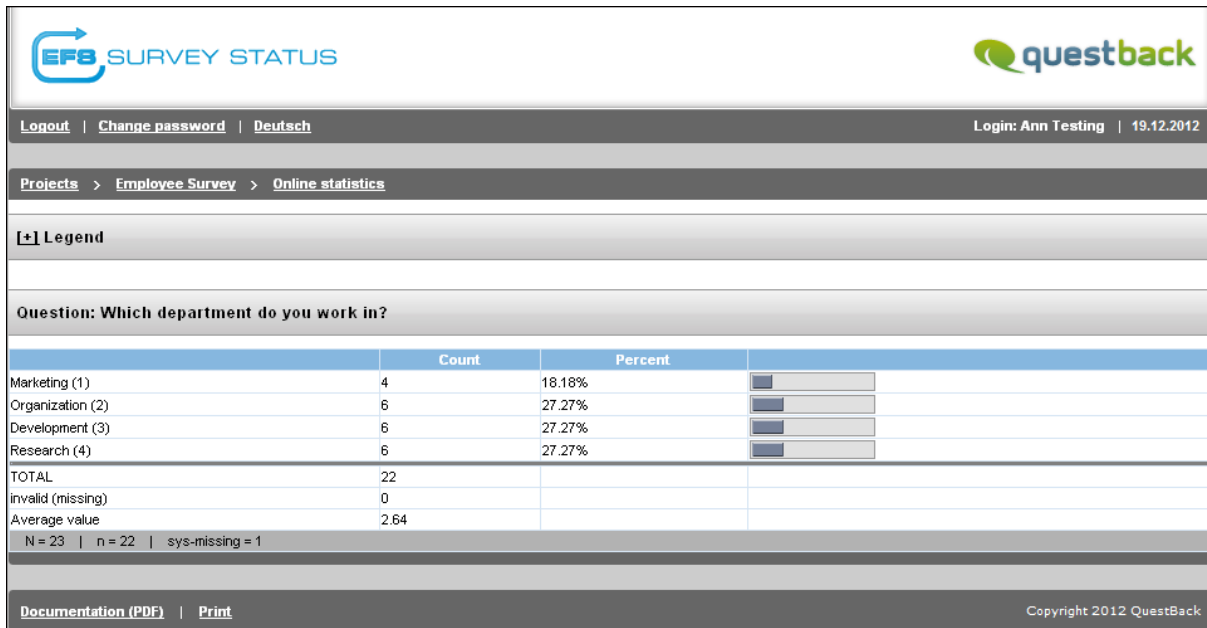


Figure 4.6 Online statistics for a single response question

4.3.1 Restricting the Online Statistics

The online statistics can be limited to specific disposition codes or variable characteristics. This feature works analogous to restricting the field report (see Chapter 4.1.5, p. 18).



Read permission for `config_fieldreport` is required for accessing the configuration options.

4.3.2 Splitting the Online Statistics

The representation of the frequency counts in online statistics can be split using a variable, i.e. you can create cross tables. This feature works analogous to splitting the field report (see Chapter 4.1.6, p. 19).



Read permission for `stat_split` is required for accessing the split options.

4.4 Open-ended Answers

In this menu, you can view the answers to open-ended questions.

4.4.1 Restricting the Open-Ended Answers

The open answers can be limited to specific disposition codes or variable characteristics. This feature works analogous to restricting the field report (see Chapter 4.1.5, p. 18).



Read permission for `config_fieldreport` is required for accessing the configuration options.

5 Providing Respondent Data

You can make the respondent export available to your staff and customers in EFS Survey Status. This export contains the so called *respondents*, i.e. all those participants,

- who have called up the survey,
- who have at least answered the first page, or
- who have completed the survey.

Such a data record is useful, for example, if you want to inform an address provider which of his respondents actually participated: You can give your address provider an account for EFS Survey Status to log in and export lists of the respondents.

The functional scope in brief:

- The respondent export is available in personalized projects and employee surveys.
- The exported XLS file contains the address data and various survey-specific data of those participants who actually participated. The access code and disposition code of the participants can optionally be included.
- Which teams are to be granted access to the data record and exactly which data are to be included in this record can be controlled via ACL rights.

5.1 Setting up Access to the Respondent Data in EFS Survey Status

Which teams are to be granted access to the data record and exactly which data are to be included in this record can be controlled via ACL rights.

- Access to the respondent export in EFS Survey Status is granted to teams possessing “read” to “ct42partadm”.
- For teams that have the “export_code” right, the access code is included in the export, otherwise this is not the case.
- You can control whether the export file should contain the disposition code by assigning read rights to “show_dispcode”.

5.2 Downloading Respondent Data via Project List

You can find the icon for downloading the respondent export in the project list.

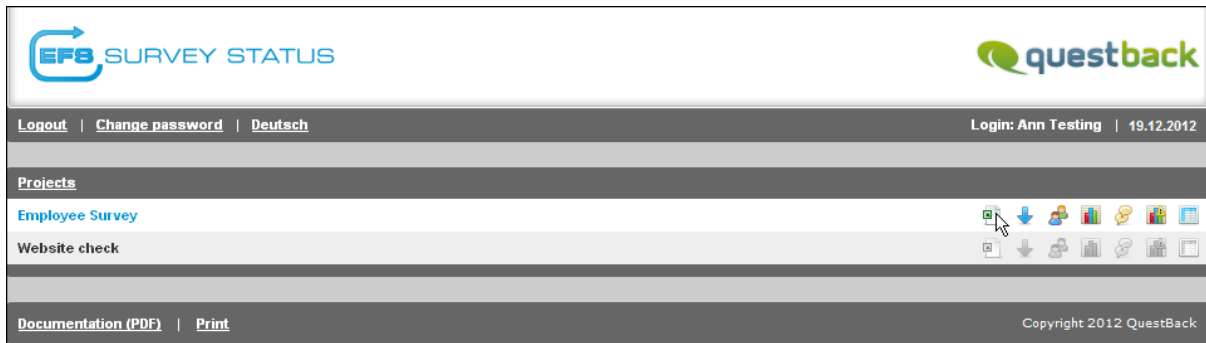


Figure 5.1 Downloading respondent export

5.3 Content of the Export File

The respondent export contains the following variables:

Variable	Meaning
u_000x	All participant variables
m_date	Date of change
c_date	Date of creation: Date and time of creation of the respective participant record
Only with "export_code" right: code	The participant's access code
dt_begin	The date on which the survey was called up
fb_act	Indicates the pg_id for the last page submitted by the participant.
remote_host	Indicates the domain of the computer via which the participant is connected to the Internet, if it has a domain. Please also refer to the notes on the availability of "remote_host" in the EFS Survey manual, Chapter 3.8.8.
remote_ address	Indicates the IP address of the computer via which the participant is connected to the Internet.
user_agent	Indicates technical data for the participant such as browser and operating system.
http_referer	Indicates the website from where the survey was called up.
Only with "show_dispcode" right: status	The participant's disposition code

Table 5.1 Variables in the respondent export

6 Providing Automatically-Generated Export Data Records

Export data records (the so-called raw data exports) can be created and automatically made available in EFS Survey Status at predefined intervals with the help of export macros. This can be useful, for example, when data have to be exported at regular intervals in a long-term study: You only need to configure the macro once, the exports are performed automatically.

The functional scope in brief:

- The macros can be executed on a daily or weekly basis. Alternatively, you can also trigger the export manually.
- The export format is MS Excel.
- Only data collected after the most recent execution will be exported. If there are no data, the macro will not be executed.
- In personalized projects and employee surveys you can formulate a condition based on the participants data, that has to be fulfilled in order for the macro to be executed.
- If you have sufficient access rights, then all the data in the static export template “Participants and result data” are available for export in project types with participant administration. You can limit the extent to particular disposition codes or variables.
- The export files are made available in EFS Survey Status. They cannot be accessed in EFS Survey.
- The export data will be deleted automatically after 30 days. This is to prevent the accumulation, in the EFS installation, of old data which is no longer required.

6.1 Managing Export Macros

In the **Projects->{Selected project}->Export->Export macros** menu, you can view and edit the existing macros.

Employee Survey: Export macros						
Export macros						
<p>💡 The automatically created export data will be archived in the area EFS Survey Status and can be seen there.</p> <p>» Create export macro</p> <p>» View</p>						
>> ID <<	Title	Start date	End date	Frequency	Condition	Actions
3	Data records for test company	2009-04-14	2009-05-14	daily	if(u_group = '2')	

Figure 6.1 Overview of the export macros

All export macros that you may access are listed in the overview table along with their respective ID, title, start and end date, frequency, and (if appropriate) condition.

The following actions are available:

- **Export file to EFS Survey Status:** Option for triggering the export manually.
- **Edit macro:** Opens the edit dialog shown in Figure 6.2.
- **Change rights for macro:** Opens the dialog for assigning access rights for the export macro.
- **Delete macro:** After a warning message is displayed, the export macro as well as the data records generated with this macro are deleted.

6.2 Creating an Export Macro

1. In the **Projects->{Selected project}->Export->Export macros** menu, click on the **Create export macro** button.

Employee Survey: Export macros

[Back to export macros](#)

Options

Hint: All fields marked with a (*) are mandatory.

Title (*)

Description

Automatically provided export data records of a project in EFS Survey Status.

Frequency (*)

Start date (*)

End date (*)

Restrict export to disposition codes (You can select more than one disposition code)

[\(select all / clear selection\)](#)

<input type="checkbox"/> Not yet started (20) <input checked="" type="checkbox"/> Currently responding (21) <input checked="" type="checkbox"/> Suspended (22) <input checked="" type="checkbox"/> Resumed (23) <input checked="" type="checkbox"/> Completed (31)	<input checked="" type="checkbox"/> Completed after break (32) <input checked="" type="checkbox"/> Rejected at login (quota closed) (35) <input checked="" type="checkbox"/> Rejected (quota closed) (36) <input checked="" type="checkbox"/> Screened out (37) <input checked="" type="checkbox"/> Quota full (41)
---	--

Conditions

Conjunction	Negation	Bracket	Variables	Condition	Code	Bracket	Delete
	<input type="checkbox"/> !	<input type="checkbox"/> (<input type="text" value="u_group (Group)"/> <input type="button" value="AA"/>	= <input type="text" value="2"/>	<input type="text" value="2"/> <input type="button" value="AA"/>) <input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="AND"/> <input type="button" value="v"/>	<input type="checkbox"/> !	<input type="checkbox"/> (<input type="text" value="--- Please select ---"/> <input type="button" value="AA"/>	= <input type="text" value=""/>	<input type="text" value=""/> <input type="button" value="AA"/>) <input type="checkbox"/>	

Condition: if(u_group = '2')

Export variables

Variable	Description	Type	
u_title		Text	<input checked="" type="checkbox"/>
u_gender		Integer	<input checked="" type="checkbox"/>
u_firstname		Text	<input checked="" type="checkbox"/>

Figure 6.2 Configuring export

2. Configure the settings for the new macro (please refer to Table 6.1 for details):

- Title and description
 - Frequency: You can choose between daily or weekly execution.
 - Start and end date: The period in which the exports are executed automatically.
 - Disposition codes: Disposition codes for which the data are to be included in the export.
3. Optionally, the EFS condition editor allows you to formulate a condition for the execution of the macro.
 4. Select the variables whose values are to be exported.
 5. Confirm by clicking on **Save**.

6.3 Settings in Detail

Field	Description
Title	Title of the export macro
Description	Description
Frequency	The exports can be executed on a daily or weekly basis. The data records will contain those data that have been collected within in the specified period. Default setting: daily
Start and end date	Use these fields to specify the period in which the exports are generated automatically. Please note that you cannot generate exports retroactively for an already expired period.
Restrict export to disposition codes	You can specify for which disposition codes you want to include data in the export. You can choose from the disposition codes greater than/equal 20, i.e. those codes for which result data are available. Default setting: Codes 21 through 41 Please note: You can only view and use the field for selecting the disposition codes if you have the “show_dispcode” read right. Otherwise, the data of all participants with disposition codes greater than/equal 20 will be exported and the disposition code will not be included in the export file.
Conditions	Only in personalized projects and employee surveys: Optionally, the EFS condition editor allows you to formulate a condition for the execution of the macro. For this, you will have access to the participants variables.
Export variables	You can specify which variables are to be included in the export. You can choose from all the variables in the static export template “Participants and result data”.

Table 6.1 Export macro settings

6.4 Access Restrictions Related to Export Macro Configuration

For access to the **Export macros** menu you need

- Read rights for “show_export”
- Read rights for “export_with_lfdn”. I.e. the right to combined access to participants and result data.

In order to create an export limited to particular disposition codes and/or containing disposition codes you need additional read rights for “show_dispcode”.

The results of protected questions are excluded from raw data exports in principle. Only by deactivating the question protection and explicitly re-activating the respective variables in the export macro afterwards, can you include these data in the export.

6.5 Setting up Access to the Raw Data Exports in EFS Survey Status

All data records of your project generated via the export macros will be listed in the **{Selected project}->List of reports** menu in EFS Survey Status.

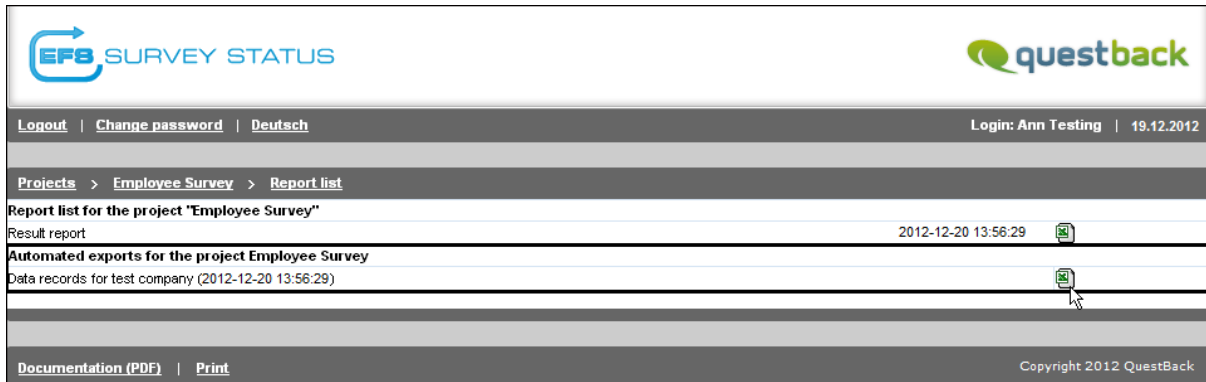


Figure 6.3 Downloading raw data record

In order to access this list your customers need, in addition to the rights that are generally required for EFS Survey Status, the following rights:

- Read rights for the export macro
- Read rights for “reportlist”

7 Providing Reports

EFS Reporting + allows you to create complete result reports with evaluation tables and charts. Optionally, you can make these reports available for the users of EFS Survey Status. Just follow the instructions in “EFS Reporting +”, Chapter 12.5.



The manual “EFS Reporting +” is available for download in the customer center.

From EFS 9.1, the date of the report generation or of the last report update is displayed. This is handy if reports are updated automatically.

Report list for the project "Employee Survey"	
Result report	2012-12-20 13:56:29
Automated exports for the project Employee Survey	
Data records for test company (2012-12-20 13:56:29)	

Figure 7.1 Downloading report

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