

WHITEPAPER

Integrating Professional Quest with a Contact Profiler Web Survey Job

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Introduction

This White Paper looks at how to integrate your surveys with our SurveyVillage panel. Integration allows you to easily request and use panel samples with your surveys.

Note

Professional Quest has been able to be used with panels for many years. Using other panels is still possible. SurveyVillage integration differs because we have full control over how the panel will integrate with your projects. We can therefore create much closer integration, and provide features and functionality that goes beyond other panel offerings.

Key Features of SurveyVillage Panel Integration

Professional Quest has very tight integration with the SurveyVillage panel. Key features of this integration are as follows:

- The ability to define the “**landing pages**” for each possible survey result for a respondent (i.e. Complete, Screenout, Quota Out). Defining these pages is all that is needed to ensure a respondent will get the appropriate reward for their participation in a survey.



- **Optimised distribution** generation that automatically sets up the distribution for SurveyVillage integration – no need to manually set up triggers, login settings or self-registration settings at all.

2 Distribute Survey with Integrated Panel Links
A survey distribution needs to be created that has the required settings to integrate with the panel. Enter the location of the survey and the survey name, then click: Build Distribution.

Survey URL location:

Survey page name: .asp

- **Integrated testing functionality** that allows testing of the flow-through of rewards codes without any permanent data being stored. This makes the performing of multiple tests simple and painless.

3 Test Survey and Panel Integration (Tests Done: 3)
A test survey can be started to allow you to ensure that completes, screenouts and quota outs are all working, and producing the correct reward codes.

- **Self-managed soft-launch** capability. This allows you to send out a small initial number of invitations as a final test of the survey process, and to confirm assumptions (such as incidence rate) prior to sending out invitations to the full sample.

4 Send Invitations
You may choose to Email any number of people involved in the job. Start by sending a small number of invites to 'soft launch' the job, then send more once the job is running smoothly.

Number of People to Email Invitations:

- **Self-managed survey invitations.** Gone are the days of setting a send time and date that is hard to change, or at the very least requires a call during business hours to make a change. You can send invitations directly through Professional Quest whenever you like.

4 Send invitations (1 emails sent, 0 remaining)
You may choose to Email any number of people involved in the job. Start by sending a small number of invites to 'soft launch' the job, then send more once the job is running smoothly.

Email template to use:

Number of People to Email: Send all remaining Emails

Integrated Sample Management through Quest

The best way to understand how a Professional Quest survey can be integrated with a Contact Profiler Panel is to look at an example from start to finish. In this example, we will prepare a simple survey that uses a panel for the respondents.

Survey Design Considerations

The design considerations when creating a survey are very simple. Essentially, you only need to follow 1 rule:

Design Rule #1

When setting up a questionnaire design, the key thing you must consider for panel integration is how you are going to set up **landing pages**. There will generally be different landing pages for each of the possible Survey reward possibilities:

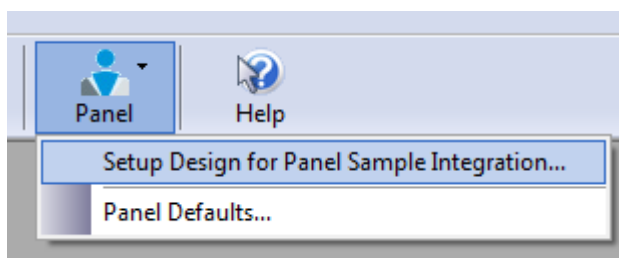
- Survey is completed
- Respondent fails to meet necessary conditions and is screened out
- Respondent is in a group that has already met the necessary quota (i.e. quota out)

Example Survey Design

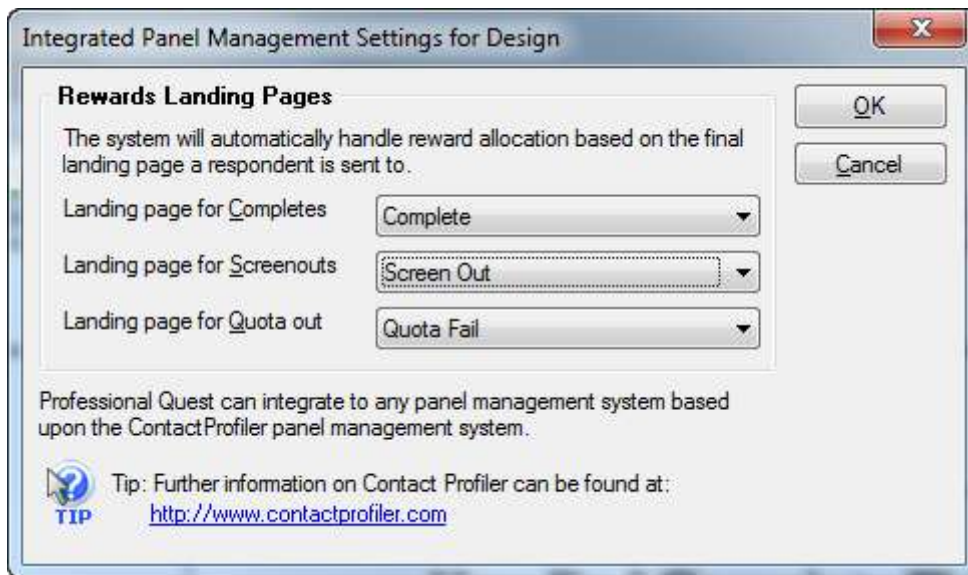
In our survey design example below, we have a landing page for each of the three reward possibilities. They appear at the end of the survey:



These pages are then set up for integration with the panel by selecting **Setup Design for Panel Sample Integration...** from the **Panel toolbar button** in the Professional Quest designer.



Simply choose the landing page in the design that matches each of the pages that a respondent would “hit” depending upon whether they complete the survey, or get screened out etc.



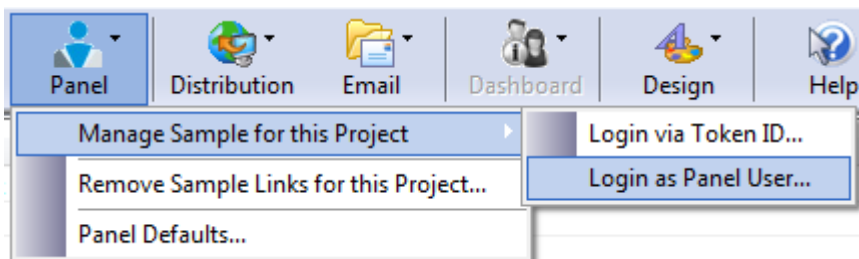
All that you need to do is ensure that your survey logic will take respondents to the correct landing page – the internal integration features of the software will deal with the internal management of reward codes.

Attaching a Web Survey Job to Survey Project

A survey project that integrates with a Contact Profiler Job is very straightforward to create, since all major aspects of the project – respondent loading, distribution, rewards management etc. – are handled through a single “Integration Checklist” window.

Note	It is assumed that you have created the Web Survey Job in Contact Profiler. Note that all that is needed is for the job to exist – no other details need to be set up if you do not have any further information at the time you want to integrate with Quest.
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Management of a sample for a Professional Quest project is performed through the **Manage Sample for this Project...** menu under the **Panel toolbar button**.



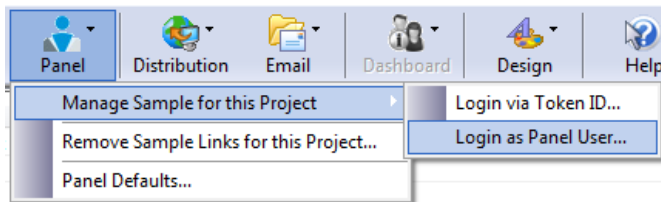
There are two ways to connect to a Contact Profiler Web Survey Job:

1. If you are an Administrator of the panel you are going to connect to, you can log in using your administrator account.
2. If you are using someone else's panel, they will provide you with a **Job Token ID** which will be used to link directly to the job that has been set up for you.

How to select a Web Survey Job if you are a Panel Administrator

Panel administrators have full access to the Panel, and therefore can choose from any available job in the panel. The steps for logging in as an administrator and choosing a Web Survey Job to link to are as follows:

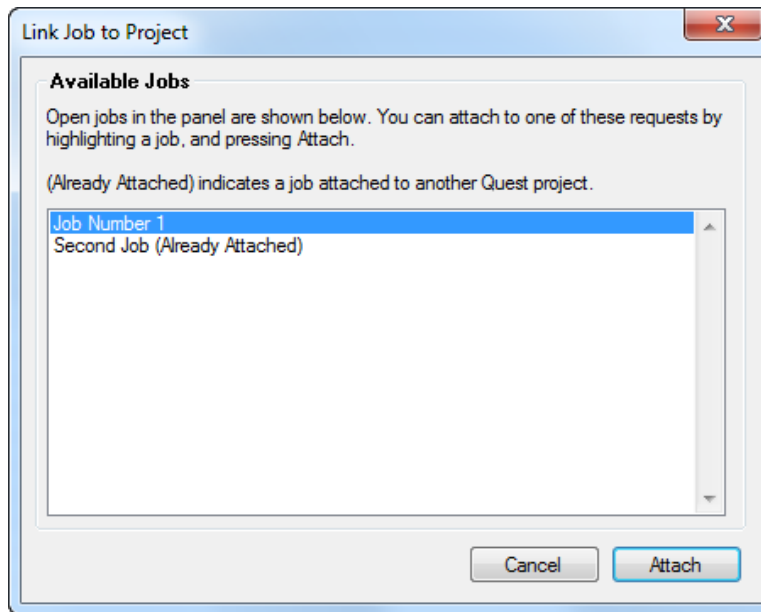
1. Click **Login as Panel User...** from the **Manage Sample for this Project** menu.



2. Enter the login and password for an Administrator account in your panel. Optionally check the **Save login details checkbox** if you want your login details to be remembered.



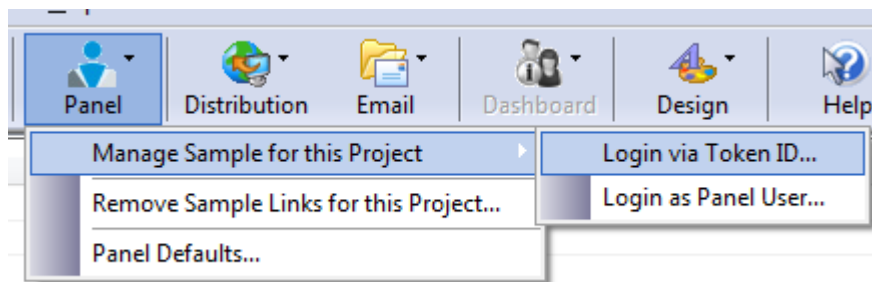
3. A list of all open Web Survey Jobs will be displayed. You can choose one of the Jobs that is not already attached. It will be attached to your Professional Quest project.



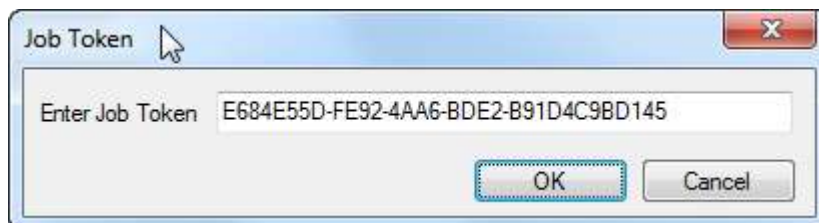
How to select a Web Survey Job using a Token ID

If you are not an administrator of the panel that you are integrating to, the Panel Administrator will set up the panel job and you can integrate it using the specific Token ID that they will send you. Linking to a job through a token ID is done as follows:

1. Click **Login via Token ID...** from the **Manage Sample for this Project** menu.



2. Enter the token for the Web Survey Job.



Note

If you want to attach to a job that has incorrectly been attached to another Quest project, go into the other project and detach the job. It will then be able to be attached to your new project.

The Sample Management Checklist

In order to make sample management as straightforward as possible, a checklist is provided for you to work through. You will see this checklist once the following conditions are met:

1. You have logged in as an administrator, and selected a Web Survey Job to be linked to, or
2. You have entered a valid token ID for a Web Survey Job

At this point, you are ready to use the sample. The checklist takes you step-by-step through the final stages of preparing your survey. The **Sample Management Checklist window** shows completed stages as **green numbers** and incomplete stages as **red numbers**:

Sample Management Checklist for this Project

1 **Ensure your design has landing pages**
In order to allocate correct reward codes to a respondent, landing pages must be set up in the design for each of the possible reward types (ie. Completes, Screenouts, Quota Outs).
[Set Landing Pages...](#)

2 **Distribute Survey with Integrated Panel Links**
A survey distribution needs to be created that has the required settings to integrate with the panel. Enter the location of the survey and the survey name, then click Build Distribution.
Survey URL location:
Survey page name: .asp [Build Distribution...](#)

3 **Test Survey and Panel Integration**
A test survey can be started to allow you to ensure that completes, screenouts and quota outs are all working, and producing the correct reward codes.
[Start Test Survey...](#)

4 **Send Invitations**
You may choose to Email any number of people involved in the job. Start by sending a small number of invites to 'soft launch' the job, then send more once the job is running smoothly.
Number of People to Email Invitations: [Email Now...](#)

[Close](#)

In the example above we see step 1 is already green. This is because we set up the landing pages in the Professional Quest Designer. You would only need to complete this stage if you hadn't set up landing pages in the designer.

Distributing your Survey

Survey distribution is the second step in the checklist. This replaces the normal method of distribution usually undertaken for a survey project (through the Distribution toolbar item).

Note

Distributions must be created through the Checklist Window, rather than through the standard distribution system. This is because all the appropriate defaults are automatically set in the distribution, and key functionality such as the use of reward codes is included in the distribution files.

To distribute your survey, you must enter the location of the survey on your Web site, and the name of the survey page:

2

Distribute Survey with Integrated Panel Links

A survey distribution needs to be created that has the required settings to integrate with the panel. Enter the location of the survey and the survey name, then click: **Build Distribution**.

Survey URL location:

Survey page name: .asp Build Distribution...

The distribution can be created by pressing the **Build Distribution button**. The key settings that are required for panel integration are shown, but not editable.

These settings include:

Page name

Welcome

Welcome to the Web survey builder! You can use this builder create the Web-based version of your survey. Enter the page name (what the survey link will be) and browser caption below (the caption is the text to show in the title bar of the Web browser).

Web Page Name Browser Caption ...

Login Access

Logins

ASP surveys can be set up to allow you to control whom may submit responses. When logins are being used for a survey, respondents may optionally be allowed to edit a response (set in their user details). If editing is allowed a respondent will be shown their previously entered response when they click on their survey link for a second time.

Control Access to Survey Features though User Logins Style

Use same login for user name and password (Hide Password field)

Post-submission Redirection

Post Submission Actions

Once a visitor has entered their response and submitted the survey, you can choose what to do after processing is complete. Options include showing a message, redirecting to a URL, or "triggering" one or more events (including sending of E-mails).

Post-submit Action:

Redirect to URL:

Once the distribution is created, the second step will become green.

2 Distribute Survey with Integrated Panel Links

A survey distribution needs to be created that has the required settings to integrate with the panel. Enter the location of the survey and the survey name, then click Build Distribution.

Survey URL location:

Survey page name: .asp

Testing Your Survey

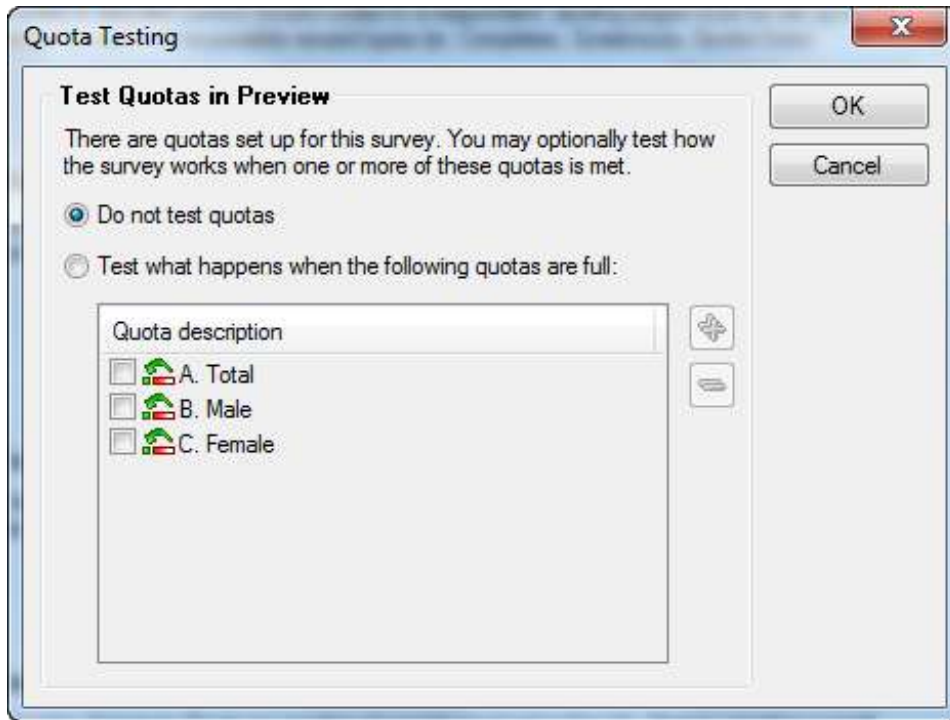
Once the distribution is created, you will be able to test the survey (step 3 in the checklist). If you have not done any testing, this step will be red:

3 Test Survey and Panel Integration

A test survey can be started to allow you to ensure that completes, screenouts and quota outs are all working, and producing the correct reward codes.

Each of the different reward types needs to be tested. **Completes** and **screenouts** can be tested by entering data into the survey that would normally result in one of these reward codes.

If you need to test quota outs, you can "force" a quota out at the start of the survey test:



The survey will be tested with an automatically generated test user, as can be seen in the test URL:

```
http://www.dipolarhosting.net/dipolar/mysurvey.asp?new=True&usr=_TEST_&pwd=_TEST_&auto=true
```

You will be able to confirm that an appropriate reward will be allocated by reviewing the message that appears at the end of the test survey.



Note You can perform as many tests on the survey as you like. No data is permanently saved into the survey response database, and no credits are stored on SurveyVillage.

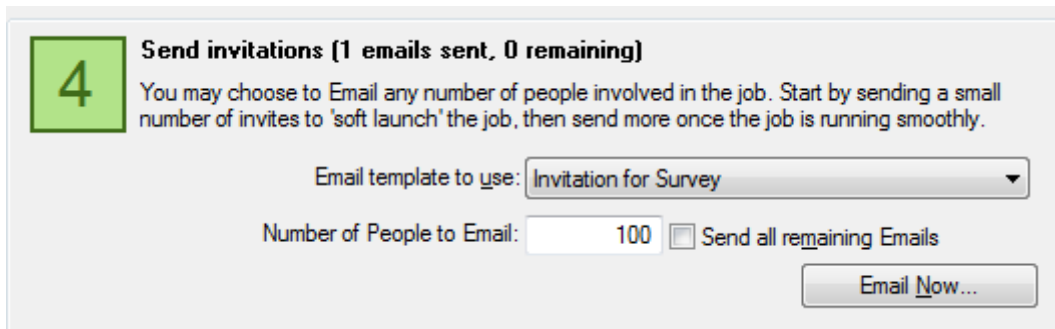
Running a “Soft Launch”

Once internal testing is complete, there is one more test that needs to be done – a “soft launch”. This is a launch of the survey to a **small subset** of the real respondents. It is important to do a “soft launch” because:

- It ensures that the survey runs as expected in a live environment
- Any issues can be isolated to a small group, should they occur
- Assumptions, such as the incidence rate, can be confirmed before sending the survey to a larger audience.

Ensure that you have a sufficient number of people in the launch to conduct the testing of the live system. Somewhere between 20 and 100 people should normally be included in a “soft launch”.

You can do as many “soft launches” as you like, since you can keep adding to the invitations to be sent out. Simply set the number of people you want to launch to, and press the **Email Now...** button to immediately begin sending invitations to these people.

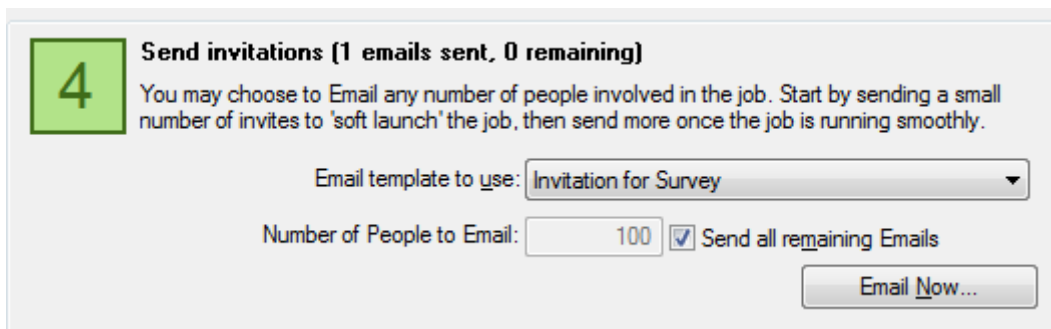


4 Send invitations (1 emails sent, 0 remaining)
You may choose to Email any number of people involved in the job. Start by sending a small number of invites to 'soft launch' the job, then send more once the job is running smoothly.

Email template to use:

Number of People to Email: Send all remaining Emails

If you want to send any remaining invitation once testing is over, click the **Send all remaining Emails checkbox**, and press the **Email Now...** button.



4 Send invitations (1 emails sent, 0 remaining)
You may choose to Email any number of people involved in the job. Start by sending a small number of invites to 'soft launch' the job, then send more once the job is running smoothly.

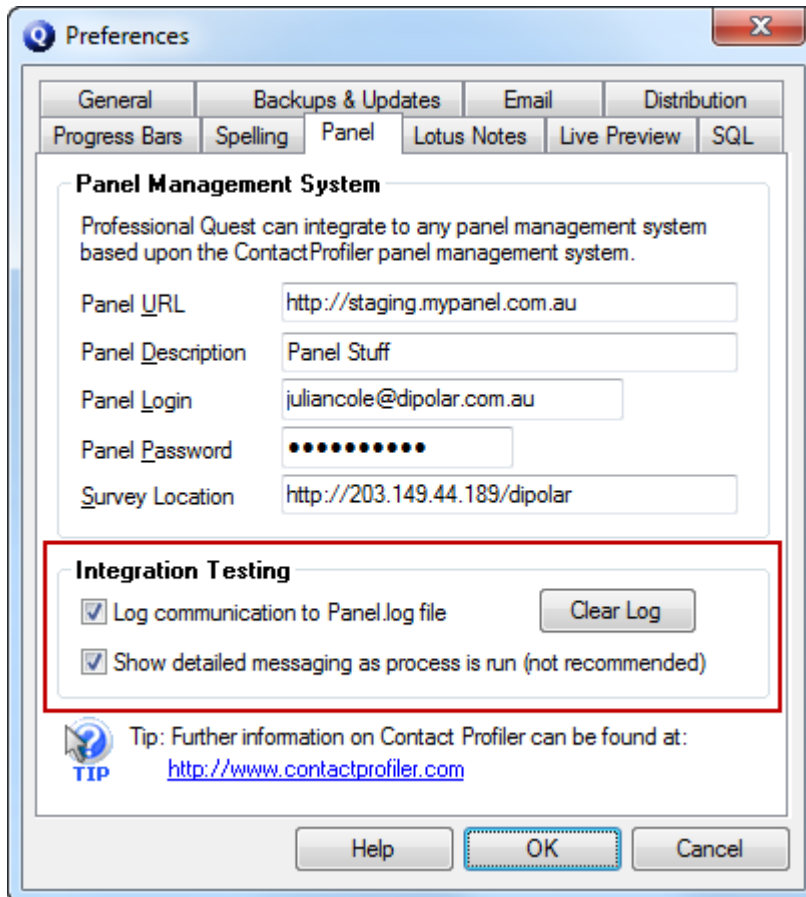
Email template to use:

Number of People to Email: Send all remaining Emails

Troubleshooting

The panel integration is performed through an exchange of “messages” between Professional Quest and Contact Profiler. If an error occurs, the content of these messages would need to be looked at.

There are two settings in the Panel defaults that enable tracking of the messages being passed between the two systems.



Log communication to Panel.log file

If the **Log communication to Panel.log file checkbox** is checked, all communication is stored in a file called “Panel.log”, which is located in your Professional Quest data directory.

If you want to do a specific test run, you can press the **Clear Log button** to remove the previous log. This will ensure that anything that appears in the log will be for the new test.

An example of a Panel.log file is as follows:

```
*****
* Panel Integration Log File
*****
* This file contains communication between Quest
* and Contact Profiler for panel integration.
*****

13/07/2010 11:27:12 AM: New Panel Integration Process Started
*****

13/07/2010 11:31:34 AM
Sent to Server: staging.selectopinionleaders.com.au
Server Script: PquestLink.ashx
Data: usr=juliancole%40dipolar.com.au&pwd=password%21&requesttype=CheckLogin

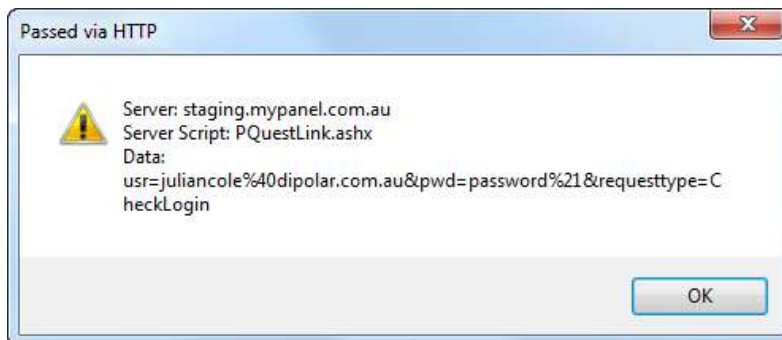
13/07/2010 11:31:35 AM
Received from Server: <?xml version="1.0" encoding="UTF-8"?><xml><SUCCESS>False</SUCCESS><ERRORTXT>Incorrect Username or Pas:
```

Show detailed messaging as process is run

If the log is not sufficient to work out the issue, each individual message that is sent to and from the server can be tracked by pressing the **Show detailed messaging as process is run checkbox**.

If checked, every message is brought up on the screen. An example of these messages is shown below.

Below is a request from Professional Quest to log in:



The response from the server is shown next:

