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# Overview

# NIPO Fieldwork System 1.11

# New Features and Known Issues

Rev.: 20091103

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# 1 Features and Known Issues in NIPO Fieldwork System 1.11

The NIPO Fieldwork System 1.11 is the latest edition of the NIPO Fieldwork System and contains new features implemented since versions 1.10 and 1.10 update. This document provides an overview of the new features.

All fixes provided with the NIPO Fieldwork System 1.10 and 1.10 update are also implemented in NIPO Fieldwork System 1.11.

## 1.1 Most important (new) features of the NIPO Fieldwork System 1.11

***Quick overview:***

- NIPO CATI / Web Master: Multiple location support
- NIPO FMS: Send E-mail invitations in waves
- NIPO FMS: Warning when scheduling E-mail in the past
- NIPO FMS: Confirmation message after *Send again*
- NIPO FMS: Invitation E-mails and reminders no longer sent for inactive surveys
- NIPO FMS: Send reminders based on interval after sent date, not scheduled date
- NIPO FMS: Token-delimited export for sample tables
- NIPO FMS: Allow filling or deleting sample table fields for currently selected field
- NIPO FMS: GUI colors can now be changed
- NIPO FMS: (Re)initialization of sample records: appointment time and call interval can now separately be cleared
- NIPO FMS: Make or change appointments for more than one sample record at the time
- NIPO FMS: Call interval fields can now be modified when editing a sample record
- NIPO FMS: Survey files overview allows renaming files in the *Exit* room
- NIPO FMS: Read-only fields in the Details screen can be copied to the clipboard
- NIPO FMS: Improved sample table import of fields containing mixed data
- NIPO FMS: Deletion of interviewer, survey and interviewer evaluation data no longer results in an occasional error
- NIPO ODIN Engine: Improved interview progress estimation for NIPO CAWI and NIPO CAPI
- NIPO ODIN Developer: Grid composer
- NIPO ODIN Developer: Separate TemplateRelatedFiles folders for CAPI and CAWI
- NIPO ODIN Developer: Nfield Code import and export
- NIPO ODIN Developer: Export X-files to Nfield Code

## 1.2 A Note on manual updates

If you proceed with manual updates of the software by unzipping the release files into their respective program directories, be advised that you need to install the Microsoft Visual C++ 2008 SP1 Redistributable Package (x86) for the NIPO ODIN Developer and the NIPO CATI / Web Master. Other software packages do not require this installation.

http://www.microsoft.com/downloads/details.aspx?familyid=A5C84275-3B97-4AB7-A40D-3802B2AF5FC2&displaylang=en

Administrator privileges are required to run this package.

### 1.2.1 Most important (new) features of the NIPO CATI / Web Master 3.09

*The following items have been changed as compared to the NIPO CATI / Web Master 3.05, as described in the **NIPO Fieldwork System 1.10 Technical Reference** Rev 20080509.*

#### 1) Multi Location Support in the NIPO CATI / Web Manager

*Implemented in NIPO CATI / Web Master (`Odmas32.EXE`) 3.09 and higher.*

The NIPO CATI / Web Master now supports multiple locations. Supervisors and interviewers are able to access only the surveys assigned to their location; supervisors cannot access surveys belonging to other locations. This allows you to limit access to surveys as well as limit supervisor to view only to interviewers on their location.

In the NIPO CATI / Web Manager, when a location is selected as currently active, only the surveys and interviewers for the active location are shown. When a survey is selected, only those interviewers working on the survey in the selected location are shown. However, more interviewers may be working on the same survey in a different location. When an interviewer workstation attempts to start a survey which does not belong to the same location, an error message is displayed and the survey cannot be started.

To turn on the multi location function, the following registry entry (a string value) must be added on the NIPO CATI / Web Master:

```
[HKEY_LOCAL_MACHINE\Software\NIPO\CATI Master]
UseIdentity=1
```

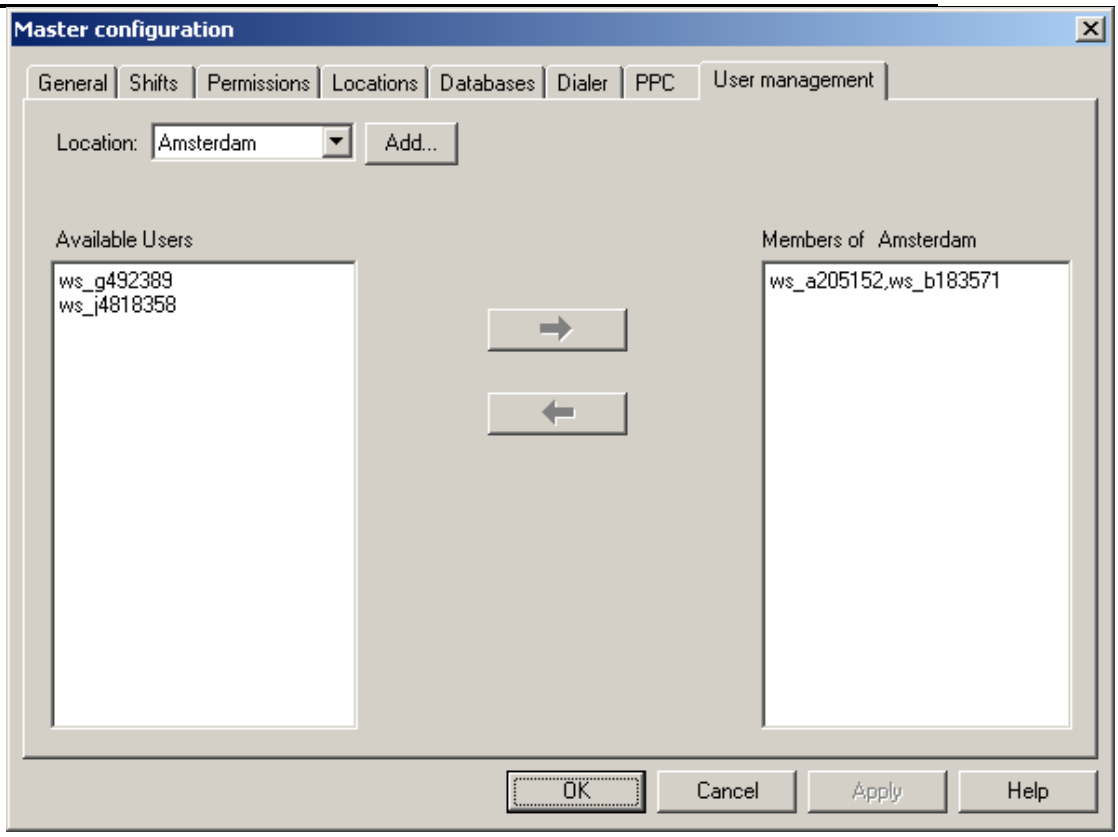
Adding this setting requires a restart of the NIPO CATI / Web Master service.

There are four 'member' types to be grouped under locations.

#### A) Users or Workstations running the NIPO CATI / Web Manager

Users (based on MS Windows logon name) or workstations (based on computer name) running the NIPO CATI / Web Manager can be added as members of selected location. In the *File > Configure >Master, User management* window, the network logon name or the workstation names, depending on the registry setting `PermissionsBasedOnUsers`, can be added or removed from a location by double clicking them or use the left/right arrow buttons. New locations can be created by pressing the *Add…* button.

Figure 1-1 | Grouping Users or Workstations on a selected location



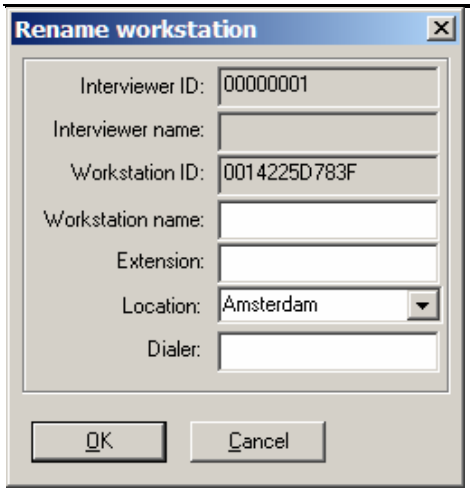

**Note:**

- Alpha, numeric and underscore are allowed in location names. Other characters are not allowed (a speaker sound is produced at any attempt to type such characters).
- The system is only aware of users or workstations that have at least once previously connected to the NIPO CATI / Web Master.
- Locations cannot be deleted.
- Members of the default location *Unlimited* can see all surveys and interviewers on all locations.
- One user or workstation running the NIPO CATI / Web Manager can belong to multiple locations, and has access to a survey at any location if the survey was configured to at least one of his locations. However, interviewers are only visible for the currently selected location.

### B) Interviewer workstations

Interviewer workstations can be members of a selected location. In *Action > Rename Workstations* windows of selected workstation, you can change the location of an interviewer workstation.

Figure 1-2 | Grouping a workstation to the selected location



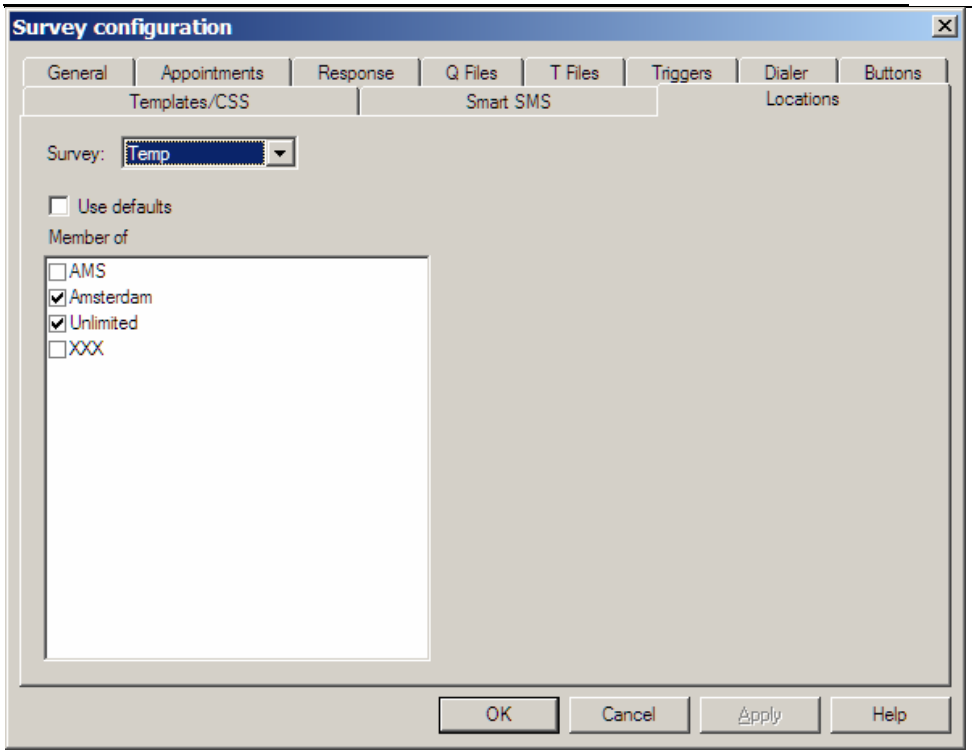

**Note:**

- A workstation can only be assigned to one location.
- Workstations have no relation to interviewers – interviewers themselves may log on in any location.

### C) Surveys

Surveys can be added to be members of selected locations. In *File > Configure > Survey… > Locations*, a survey can be selected and its corresponding location can be selected. When *Use defaults* is selected, its multi-location setting is the same as the `<<default>>` survey.

Figure 1-3 | Grouping survey to selected locations




**Note:**
A single survey may be run on multiple locations.

**D) Web connections**

Web connections are in fact not part of a location, but they are still considered a kind of interviewer connection. Therefore, web connections *must* be assigned to a location. This location can be an existing call centre, or it can be a virtual (fake) location.

Since all web connections are handled through the Web Demon, you can assign all web connections to a location by giving the Web Demon a location. This allows you to e.g. make web connections completely invisible to users, or to make web connections visible by assigning them to a special location and giving all call centre managers access to the location. By default, all call centre managers can always see the amount of web connections on surveys for which they have access. The web connections themselves however are invisible unless the user has unlimited access.

To configure the location of the Web Demon, first start a web survey and assign it to the location in which you want web connections to appear. In the NIPO CATI Manager, make sure you have access to the location. Right-click on the Web Demon in the interviewer screen and select *Rename workstation…* Select the appropriate location from the drop-down list.

**Important note:**

When using locations, you *must* ensure that the web survey is assigned to the location where the Web Demon is assigned. Otherwise, web respondents will not be able to access the survey! One way to make sure this happens is by assigning the *Default* survey to the location of the Web Demon.

### 1.2.2 Most important (new) features of NIPO FMS 1.11

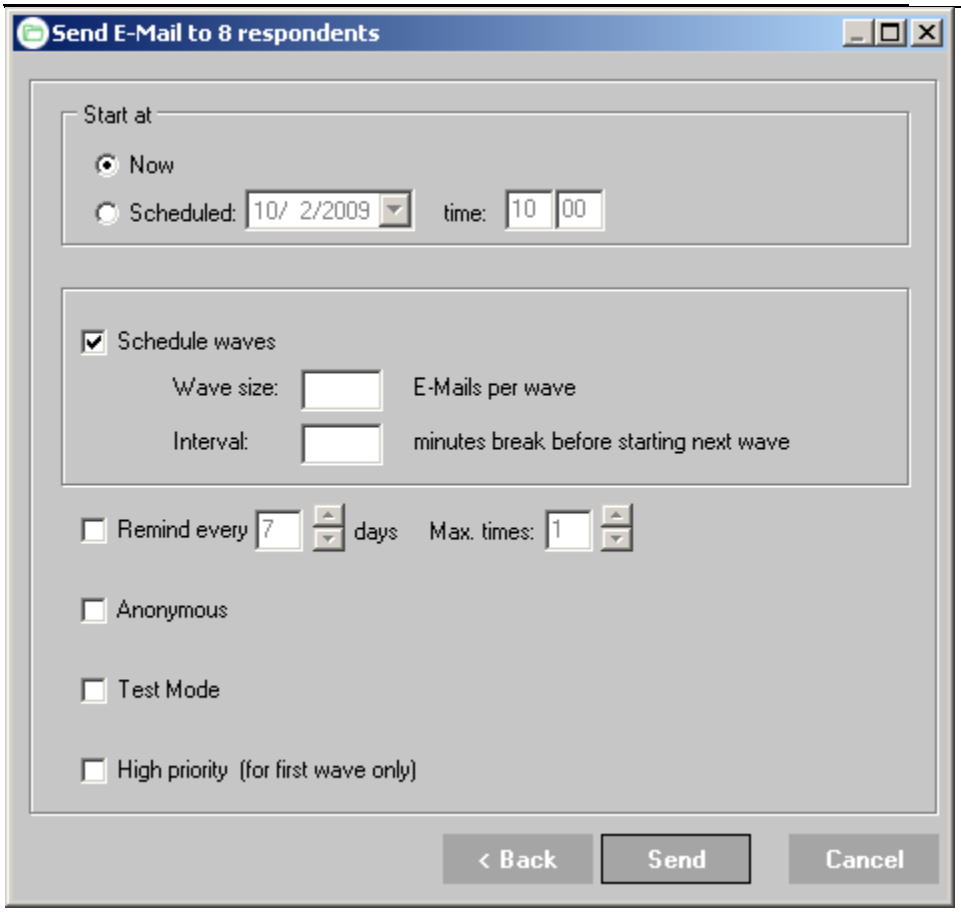
*The following items have been changed as compared to the NIPO FMS 1.10, as described in the **NIPO FMS 1.10 User's Guide** and the subsequent NFS 1.10 update document.*

#### 1) Send E-mail invitations in waves

When selecting a list of sample records to send an invitation, it is now possible to specify that the message is sent in waves rather than in one go. You determine the size of each wave in the number of E-mails.

To set up a wave, make a selection of sample records to send the invitation to. Then right-click on the grid and select *Email > Send invitation…*

Figure 1-4 | Send invitation E-mail in waves




Check the box marked *Schedule waves* to specify that the current selection needs to be split into waves. At *Wave size*, specify the amount of E-mails that need to be sent per wave. At *Interval*, specify the interval between the waves in minutes.

Click *Send* to finally send the E-mails. Note that the first wave is sent immediately or at the scheduled start date, as specified at the *Start at* time.

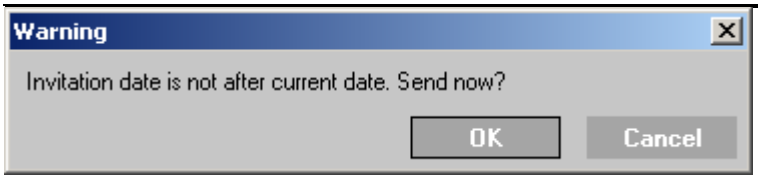
When the option *High priority* is selected, this is only set for the first wave.

Note that even if E-mails are sent in waves, they are still considered part of the single batch in which you sent them. The scheduled date is in fact the scheduled date of the entire batch, but the actual scheduled date may fall later depending on the selected interval and the wave in which the E-mail is planned!

**2) Warning when scheduling E-mail in the past**

When attempting to schedule E-mails on a date that has already passed, the NIPO FMS now issues a warning. You will be given the option to send the E-mails immediately.

Figure 1-5 | Scheduling mails in the past




**3) Confirmation message after *Send again***

After choosing a selection of E-mails to be sent again, the NIPO FMS now displays a confirmation that the E-mails have been sent.

**4) Invitation E-mails and reminders no longer sent for inactive surveys**

NIPO FMS 1.10 erroneously sent invitation E-mails and reminders for inactive surveys. In NIPO FMS 1.11, these E-mails are no longer sent for inactive surveys. It is also not possible to schedule invitations for inactive surveys.

**5) Send reminders on interval based on sent date, not scheduled date**

NIPO FMS 1.11 now correctly sends reminders counting from the date the first mail was sent rather than the date it was scheduled. This is a small but sometimes relevant difference: due to other batches currently running, the NIPO FMS is not always capable of sending E-mails at the scheduled date. In such cases, E-mails are normally sent at the first available opportunity, but reminders are then often coming in a little early.

**6) Token-delimited export for sample tables**

You can now export sample tables as both fixed and delimited (CSV) text files. From the menu, select *Actions > Export Sample table > Save as delimited ASCII file (CSV file)…* and choose a filename. CSV files can be opened in for example Microsoft Excel.

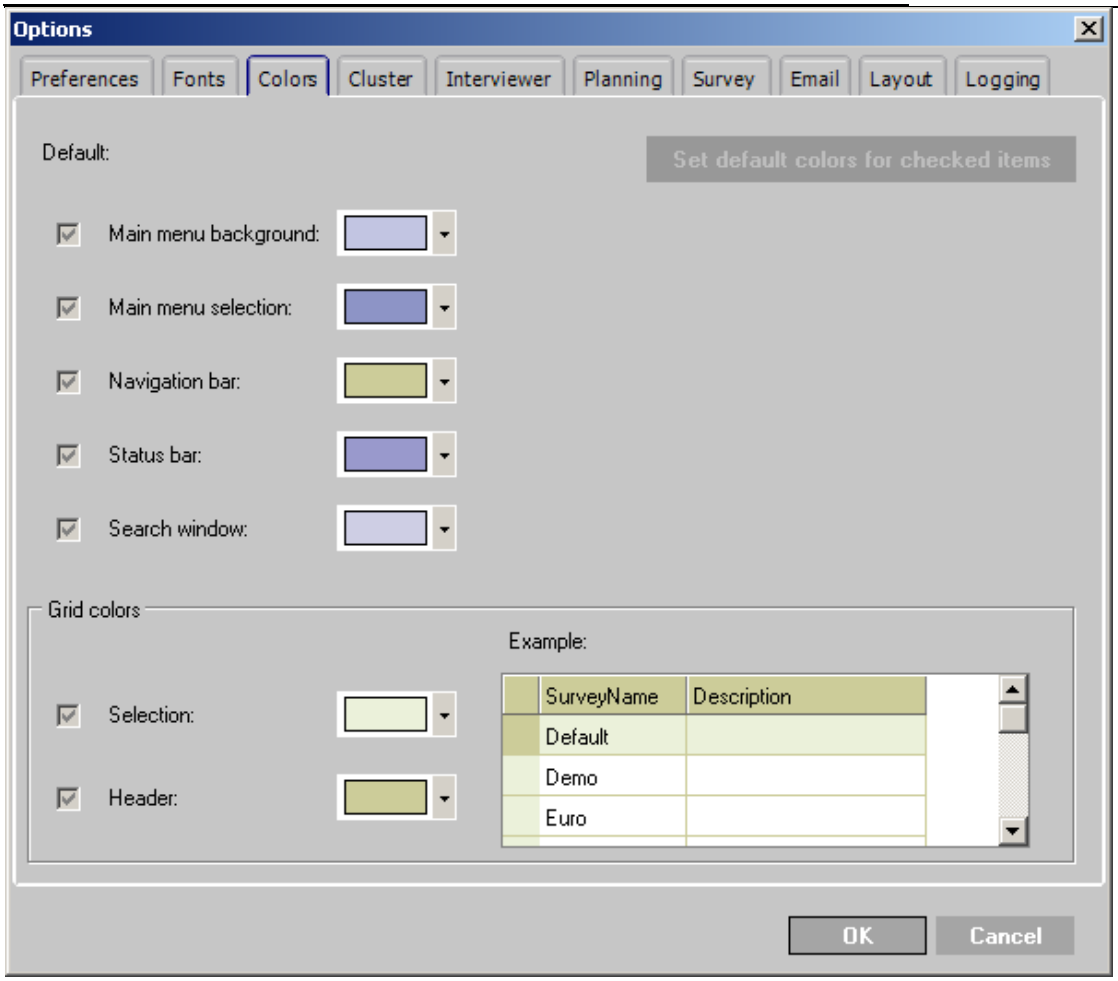
**7) Allow filling or deleting sample table fields for currently selected field**

When selecting to fill or delete a field, the currently selected field is now taken as the default field to take action upon.

### 8) GUI colors can now be changed

It is now possible to change the GUI colors of the NIPO FMS. Select *Configure* > *Options* > *Colors* to open the color configuration tab.

Figure 1-6 | Configuring GUI colors




For the colors of grid items, an example grid is shown at the bottom right.

To change the color of any of the items, click on the color drop-drown box. This will open a color selection box.

Figure 1-7 | Selecting a color

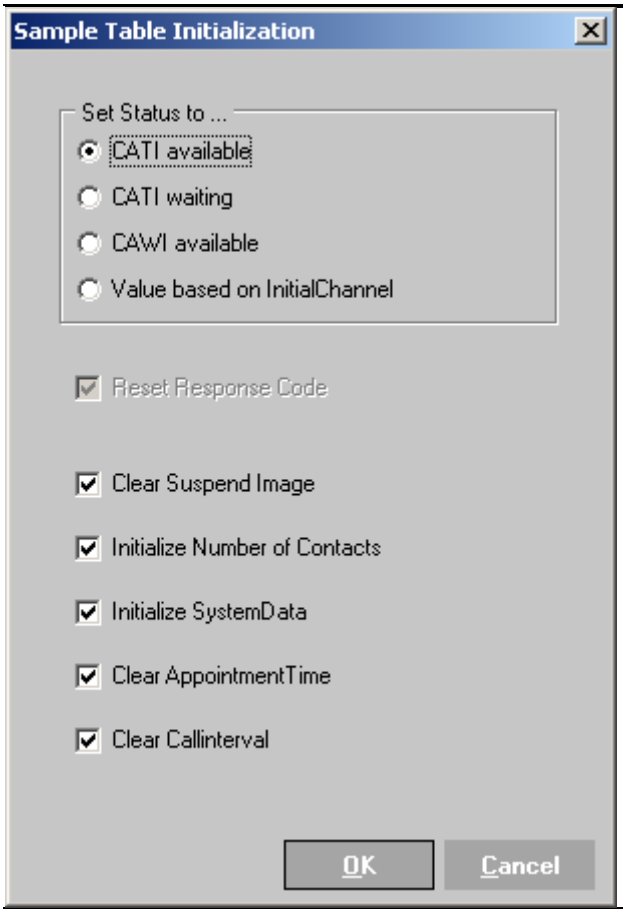
Select your color of choice using the color picker. Notice that the current color is displayed in the bottom left, and the current selection is displayed in the bottom right.

In the color selection dialog, you can revert to the defaults for one or more colors. Click the checkbox for the item(s) which you wish to reset to the default, then click *Set default colors for checked items* to reset the default for your selection. Note that for colors that are already set to the default, the relevant check box is disabled.

### 9) Clear appointment time and call interval independently on initialization

When (re)initializing a number of sample records, you can now choose for both the appointment time and the call interval whether or not they need to be cleared.

Figure 1-8 | Clearing appointment time / call interval at (re)initialization




### 10) Make or change appointments for more than one sample record at the time

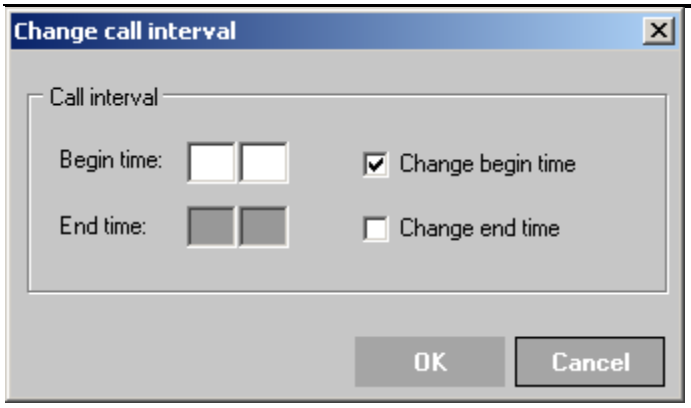
You can now make or change appointments for more than one sample record at a time. In the sample table, make your selection, right-click the grid and select *Make / Change appointment…* from the dropdown list. The usual dialog for appointment changes appears. Any changes are applied to all records in your selection.

### 11) Call interval fields can now be modified when editing a sample record

When right-clicking to edit a sample record, you can now also change the CallIntervalBegin and CallIntervalEnd values. These fields were previously disabled for editing in NIPO FMS 1.10.

Press the … button next to any of the appropriate fields.  A dialog is shown:

Figure 1-9 |  Changing the call interval begin and end values



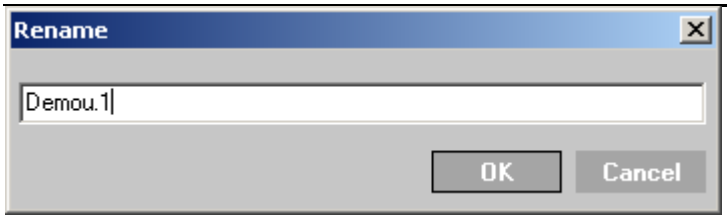

To change any of the two times, select the appropriate checkbox.

### 12) Survey files overview allows renaming files in the Exit room

You can now rename files located in the Exit room. This may be useful if you need to export files to the Exit room that have not yet been removed, but should not be overwritten by files coming from the Working room.

To rename files in the Working room, right-click on the file and select *Rename…* from the dropdown list.

Figure 1-10 |  Renaming a file in the Exit room




### 13) Read-only fields in the Details screen can be copied to the clipboard

In the *Interviewer* or *Survey* details screen, you can now copy read-only fields such as the AuthenticationKey field, to the clipboard. To copy the field, right-click in the appropriate field and select *Copy* from the context menu.

### 14) Improved sample table import of fields containing mixed data

In NIPO FMS 1.10, if you imported sample data into a field that contained both records with numerical values and records with text values, the import would fail as the MS SQL import expected numerical values based on the first content imported. A feature has been added to circumvent the error. To enable this feature, two registry values need to be added to the server running the NIPO FMS server. Note that these changes apply to the Microsoft Jet engine and can potentially slow down import.

```
[HKEY_LOCAL_MACHINE\Software\Microsoft\Jet\4.0\Engines\Excel]
ImportMixedTypes=Text (string)
TypeGuessRows=0 (dword)
```

### 15) No more occasional error on deletion of Interviewer and Survey data

When deleting Interviewer, Survey or Interviewer Evaluation data, an error would occasionally occur in NIPO FMS 1.10 and earlier. This happened because such data is copied to a backup table which did not always contain the fields of the originating table. The NIPO FMS now creates fields in the backup table to facilitate the procedure.

### 1.2.3 Known issues in NIPO FMS 1.11

#### 1) Documentation on search string

The Search facility in the NIPO FMS was not properly documented. There was no apparent difference between a regular search and an *Exact* search: for example, a normal search for a string “Amsterdam” would not yield “Location Amsterdam” if such a record existed in the sample. This happens because the search facility only searches for entries *starting* with the specified string. For example, when searching for “Amsterdam”, the search could yield a record with “Amsterdam and around” if such a record existed.

If you need your search to yield all records containing a particular word based on a partial match, you can use the wildcard %. For example, the search string “%Amsterdam” yields both “Location Amsterdam” and “Amsterdam and surroundings”.

#### 2) Search string should not be empty for exact searches on string fields

When performing an *Exact* search on a field of type *string* or *nvarchar*, an empty search string produces an error. This error is non-fatal – simply change the search query or click *All* to display a new search result.

### 1.2.4 Most important (new) features of the NIPO ODIN Engine 5.15

#### 1) Improved interview progress estimation for NIPO CAWI and NIPO CAPI

In the HTML templates of NIPO CAWI and NIPO CAPI it is possible to include a progress bar that gave a percentage of progression through the questionnaire. A number of issues have been resolved that improve the indicator's progress estimation:

1. A bug has been removed in which a question too many was calculated for the total, causing the progress bar to end prematurely.
2. All `*DUMMY` questions are now ignored for progress estimations. Note that null-evaluating filter questions and questions without text are still counted – these can therefore be used to invisibly influence the progress bar.
3. Progress is now correctly counted across `*REPEAT` and `*GOSUB` blocks. The progress bar no longer halts at such sections.

**Note:**
The progress bar can always jump forward disproportionally as it is subject to questionnaire routing and filtering. Also note that by design, the progress bar never actually reaches 100% (although rounding may cause it to occasionally hit 100% on very large questionnaires). The relocation page is considered to be the '100% page'. You may want to include a completed progress bar on this page.

### 1.2.5 Most important (new) features of NIPO ODIN Developer 5.11

*The following items have been changed as compared to the NIPO ODIN Developer 5.08, as described in the **NIPO Fieldwork System 1.10 Technical Reference** Rev 20080509.*

#### 1) Grid Composer

*Implemented in NIPO ODIN Developer 5.11 and higher.*

A user-friendly Grid Composer is now available to generate the scripting of grids and scales efficiently with adequate spacing. After entering the parameters in the *Insert Grid Question* screen, the script for the grid / scales will be inserted into the script in the Q-file. You can quickly create the script of grid / scales of `*MULTI`, `*SCALE`, `*GRID`, `*NON`, `*CONTROL`, `VCONTROL` commands to be further modified upon your needs.

The following screen can be shown by right-clicking the coding area of NIPO ODIN developer and selecting *Insert > Grid Question*.

Figure 1-11 | Configure the Grid Composer

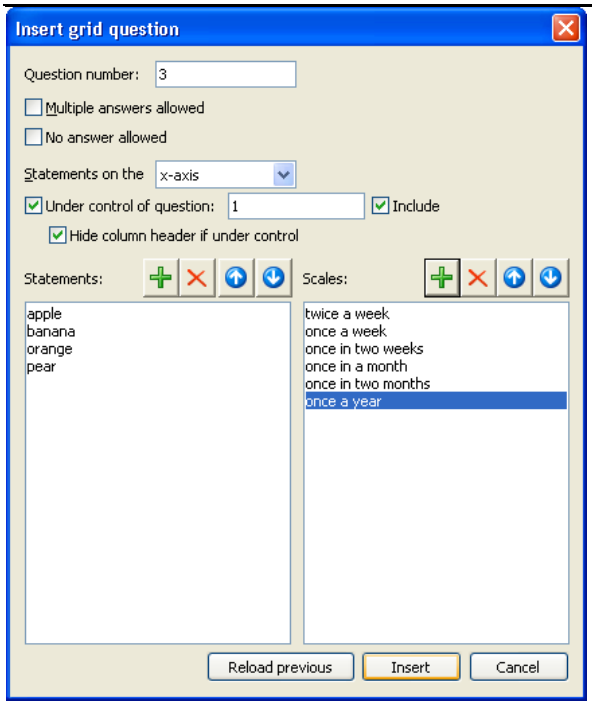
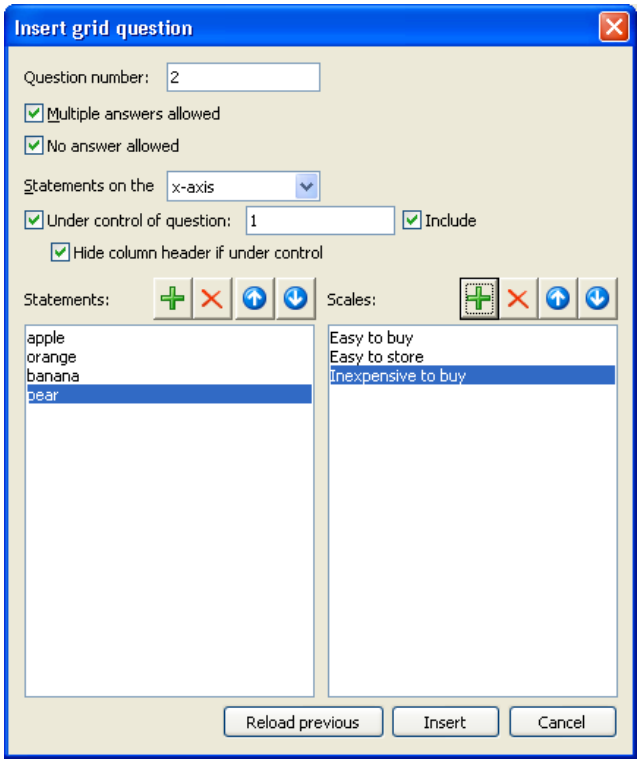


Table 1-1 | Explanation of Insert Grid Question screen

| ***Description*** | ***Meaning*** |
|---|---|
| Question Number | The question number for this grid / scales |
| Multiple answers allowed | Check this to append `*MULTI` to all `*SCALE` commands or the `*GRID` command |
| No answer allowed | Check this to append `*NON` to the `*QUESTION` command |
| Statements on the x-axis / y-axis | The location of the statements will determine whether the composer will generate a `*GRID` or one or more `*SCALE` commands.<br>- If the statements are on the x-axis a, grid will be generated and all `*CONTROL/*VCONTROL` options are available.<br>- If the statements are on the y-axis one or more `*SCALE` commands are generated (the option to hide the column header will be greyed out as this combination is not possible). |
| Under control of question | Selecting and entering the question number to be dependent on will result in a `*CONTROL` statement being added after the `*QUESTION` statement. |
| Include | Selecting will result in a 'W' after the `*CONTROL/*VCONTROL`, else an 'N' will be generated. |
| Hide column header if under control | Only available when statements are on the x-axis to hide column headers if under control. Selecting it will result in `*VCONTROL` replacing `*CONTROL`. |
|  | Add a new statement or scale item. |
|  | Delete the currently selected item. |
|  | Move the currently selected item up in the list. |
|  | Move the currently selected item down in the list. |
| Reload previous | Reload the data of the last insert grid. |
| Insert | Insert the script to the Q-file. |
| Cancel | Cancel insertion of a grid. |

Example 1-1 | Using Grid Composer

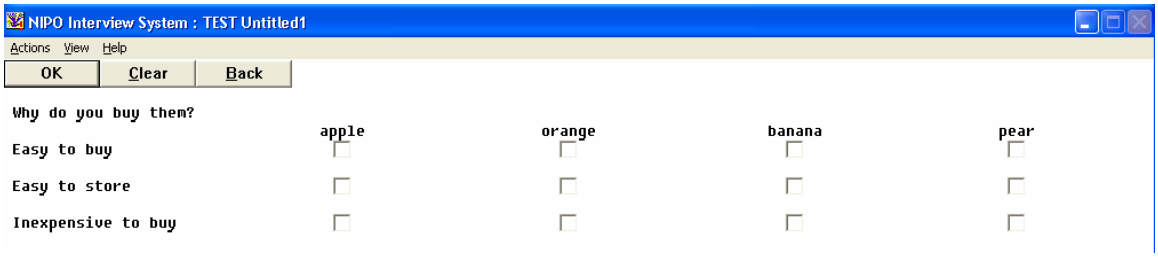
**Parameters:**




**Script generated with modification on question description:**

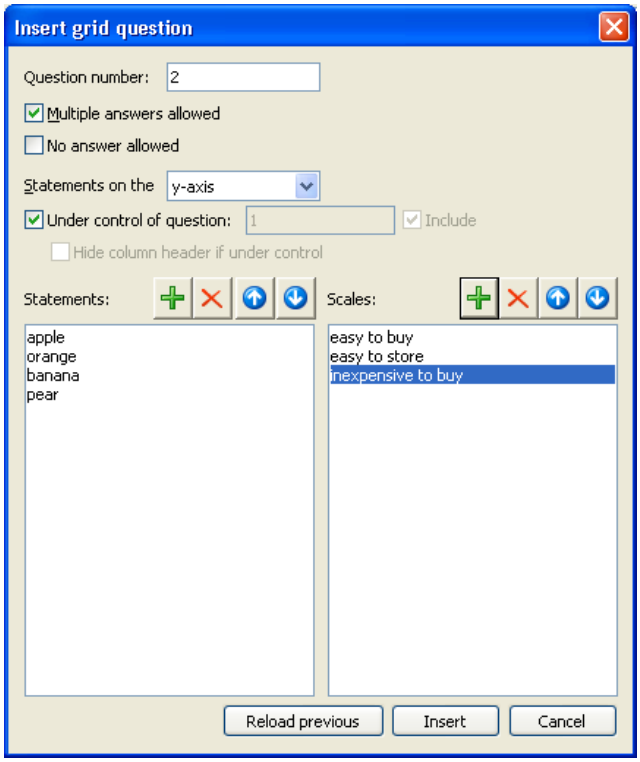
```
*TAB 20, 40, 60, 80, 100
*QUESTION 2 *FORM *NON *VCONTROL Q1 W
Why do you buy them?
      apple orange      banana      pear
1:Easy to buy    *GRID L12 3.2 4.4 *MULTI

Easy to store

Inexpensive to buy
```

**Result:**



Example 1-2 | Using Grid Composer

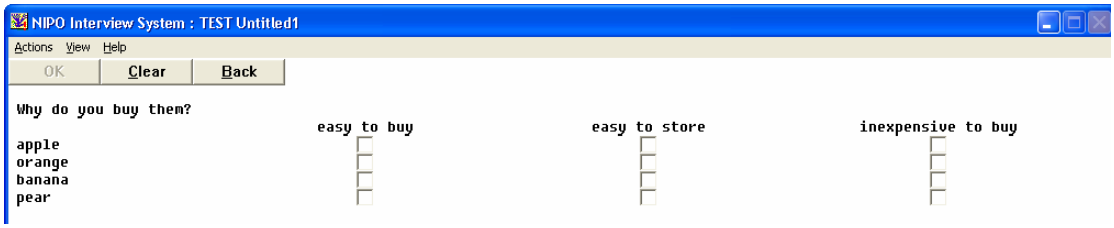
**Parameters:**




**Script generated with modification on question description:**

```
*TAB 20, 46, 72, 100
*QUESTION 2 *FORM *CONTROL Q1 W
Why do you buy them?
      easy to buy      easy to store    inexpensive to buy
1:apple     *SCALE L3 3 1 *MULTI
2:orange    *SCALE L3 3 1 *MULTI
3:banana    *SCALE L3 3 1 *MULTI
4:pear      *SCALE L3 3 1 *MULTI
```

**Result:**



**Note:**

- The grid composer works as a wizard: once inserted, the grid composer can no longer be used to modify the grid. Modifications need to be done directly on the script.
- Validity of the question number and control question number in the grid composer are not checked against the questionnaire. Run a syntax check to check for errors.
- The size of the field associated with `*SCALE` is computed based on standard scales that start from 1. If `*SCALERANGE` command with negative values is used, the computed field length may has to be manually adjusted.

### 2) Separate TemplateRelatedFiles folders for CAPI and CAWI previews

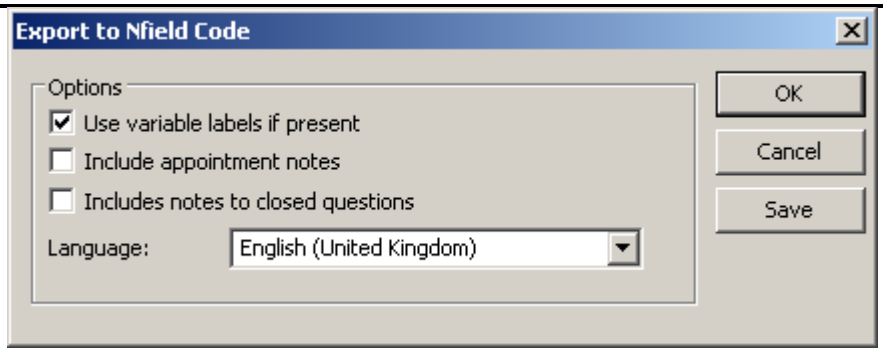
You can now set separate TemplateRelatedFiles folders for the CAPI and CAWI previews, rather than having to use the same folder for both. This is useful if scripting is required for both channels because there are small differences between CAPI and CAWI HTML rendering, and because you may wish to apply different templates and styling for the channels.

### 3) Nfield Code import and export

Nfield Code is the successor to the NIPO ODIN Coding Module. To support this application, Nfield Code imports and exports have been implemented in the NIPO ODIN Developer.

To export a questionnaire and its open-ended answers to Nfield Code, select *ODIN* > *Export* > *Nfield Code…* from the menu.

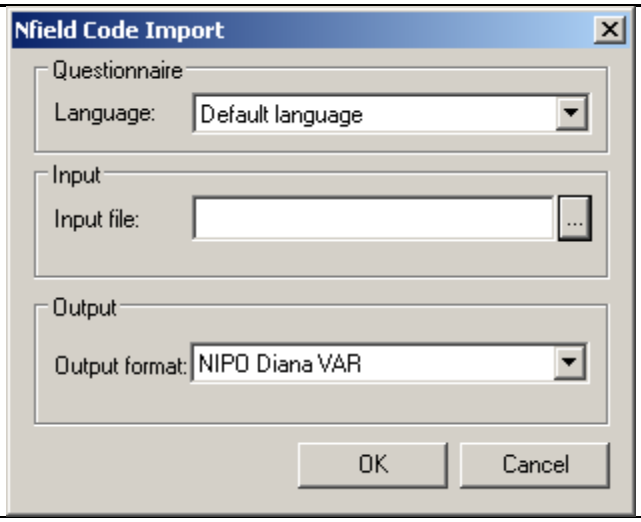
Example 1-3 | Exporting to Nfield Code




Select Use variable labels if present if you wish to use the labels defined by the `*VAR` and `*LABEL` commands. Select *Include appointment notes* to include appointment notes as a separate open-ended question. Select *Includes notes to closed questions* to include questions on which an open-ended answer was not available but forced. At *Language*, select the name of the original language in which the questionnaire was scripted. Note that the export always uses the code frame defined by the default language (the original script) – other languages cannot be exported. Click *Save* to save your currently selected settings. Click OK to finally create the Nfield Code import file. The file will be saved with the name of the survey followed with the extension `NFC`.

Once the coding has finished and an NFC file has been exported from Nfield Code, this file can then be imported back into the questionnaire data by selecting *ODIN* > *Import* > *Nfield Code…*

Example 1-4 | Importing from Nfield Code

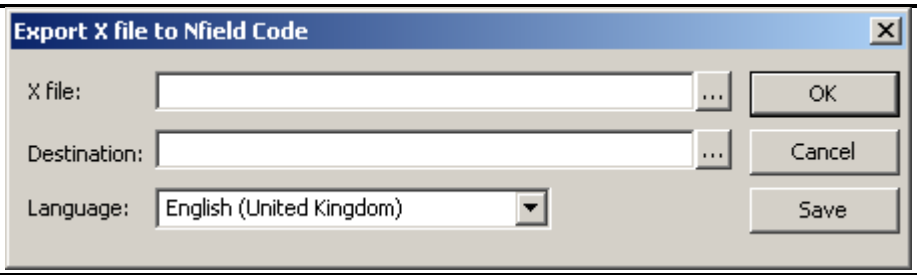



At *Language*, select which question and code frame translation, as set up in the Nfield Code project, you wish to use for the code frames in the resulting export. At *Input file*, select the NFC file you wish to read data from. At *Output format*, select the type of export you wish to make. Clicking *OK* brings you to the relevant export options for the selected output format.

### 4) Export X-files to Nfield Code

NIPO ODIN 4.08 coding files can be exported to Nfield Code. The NIPO ODIN Developer 5.11 contains an export feature that allows you to create a Code Frame in Nfield Code format. To export an X-file as Code Frame file, click *ODIN* > *Export* > *Export X file…* from the menu.

Example 1-5 | Exporting an X-file to Nfield Code




At *X file*, select the X-file to export to Nfield Code. At *Destination*, select a folder in which the Code Frames should be exported. Note that Nfield Code exports all Code Frames in the questionnaire. At *Language*, select the language for which the Code Frames should be imported in Nfield Code.

Files are saved in the format

```
[Surveyname]X_[SubquestionnaireNumber]_[Position]_[Length]{C[Code]}.nfcf
```

The `Position` and `Length` parameters correspond to the question position and length as specified in the questionnaire. If the Code Frame is part of a semi-open ended question, `Code` specifies the code number on which the `*OPEN` command was used.