



Project Manager User Manual

Version 2.2

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1 Introduction

1.1 About Metatude

The Metatude software suite allows you to collect feedback on the performance and activities of your company from stakeholders such as customers, business partners, co-managers and employees. This information is vital to your company because it allows you to fine-tune your business activities and company policies to the perception of your performance. And it is this information that will allow you to gauge and influence what others may say and think about your company, something that can make or break you. Essential information that constitutes the basis for your business decisions.

Metatude's web-based interaction allows you to collect feedback on issues such as:

- customer satisfaction and loyalty
- employee commitment
- corporate reputation
- business ethics
- service level management.

Metatude is designed for large organizations with complex IT infrastructures and many stakeholders. Once the software is installed you can easily define target groups, create questionnaires, conduct research and manage output for analysis and reporting tools.

For more information on Metatude software, technology and business examples please consult our website at: <http://www.metatude.com/>

1.2 About this manual

This manual will show you how to manage stakeholder feedback with the Metatude Project Manager. After you have read this manual you will be able to manage projects designed to collect stakeholder feedback.

We distinguish two types of users of the Metatude software: the administrator and the end-user. Installation and maintenance of the Metatude software is the responsibility of the Administrator. The managers who use Metatude to collect feedback are the Users. The license agreement for your organization indicates the number of administrators and users.

All information for administrators on installation and maintenance of the software can be found in the next chapter. More extensive information about the use of Metatude software for both administrators and users can be found in following chapters.

This manual is dated August 16th, 2004; Metatude will update this documentation if needed. Please check <http://www.metatude.com/support/> for recent versions.

1.3 The Metatude Suite

The Metatude software suite consists of four interacting software components:

1. Metatude Dialogue Server
2. Metatude Channel Integration Components
3. Metatude Dialogue Designer
4. Metatude Project Manager.

The basis of the Metatude architecture is a central server (Metatude Dialogue Server) that needs to be installed in your organization. This server maintains the connections with databases, stores and serves the dialogues to stakeholders and collects and stores the collected data in a database.

Once the Dialogue Server is installed, you can manage any stakeholder feedback with two desktop applications that are relevant for the regular user: the Metatude Dialogue Designer and the Metatude Project Manager. Consultants, managers and researchers can use these two applications to prepare questionnaires and manage projects involving stakeholder feedback.

1. Metatude Dialogue Server

The Metatude Dialogue Server (MDS) is the central component within the Metatude architecture. This server connects to databases and directories with stored stakeholder information, communicates with electronic channels, stores and serves dialogues and writes results to a database. All the project information and intelligence to manage projects automatically resides on this server.

2. Metatude Channel Integration Components

The Metatude Channel Integration Components (MCIC) need to be installed on an electronic channel. This allows the channel to communicate with the central server.

3. Metatude Dialogue Designer

The Metatude Dialogue Designer (MDD) is a Windows application that is used to create questionnaires. With a simple and intuitive interface any user can learn how to create questionnaires in a matter of minutes. Many question types are supported, e.g. open questions, multiple choice, multiple response, scale and matrix questions.

4. Metatude Project Manager

With the Metatude Project Manager (MPM) you can manage stakeholder feedback projects. The MPM can connect via a network to the Metatude Dialogue Server. Once logged on you can connect databases and directories, create target groups, assign dialogues to (multiple) target groups and retrieve results in the desired format.

2 Installation and modification (for administrators)

2.1 Operating system

In this section you can find information on the system requirements and how to install the Metatude Project Manager.

Operating system and system requirements

The Metatude Project Manager is a Windows application. It will run on Windows 98, Windows NT, Windows 2000 and Windows XP. In order to work with Metatude Project Manager, you will need hardware that meets the following minimum specifications:

- 400 MHz Intel or AMD Processor
- 32 MB RAM
- 30 MB of available space on the hard disk
- CD-ROM station.

The CD-ROM station is needed for installation of the software. The project manager can download results as Microsoft Excel files. For this you need to have installed Microsoft Excel 97 or higher.

2.2 Installation

Installing from CD-ROM:

- Place the Desktop software CD-ROM in the CD-ROM drive.
- Browse to the *Project Manager* directory on the CD-ROM and double click the file *setup.exe*.
- Press **OK** to start the installation procedure.
- Follow the instructions on the screen.
- A message will appear when the installation is completed.

2.3 Users and administrators

This section describes how to create, edit, and delete users. These functions are only accessible for persons with administrator rights. If you only have user rights, you can not access the user management area. Administrators can arrange who has user rights by creating, editing, and deleting users. Each user is assigned a username and a password.

To gain access to the Metatude Dialogue Server (MDS) a license is needed for each user and administrator. The license key for the MDS is issued for a certain number of users. The number of users and administrators cannot exceed this limit. When the maximum number of users is reached the server will not accept the creation of new users. A possibility is to upgrade the MDS license with more users. You can find more information about upgrading at <http://www.metatude.com>. Another alternative is to temporarily inactivate some existing users.

Within Metatude there are rights on two levels:

- administrator level
- user level

Usually an organization will have only one or two administrators and multiple users. The functions they may perform are listed in the table below:

Activity	Administrator level	User level
Logging on to the server	x	x
Managing users on the server	x	
Managing server connections to directories	x	
Managing destination databases	x	
Managing Database Feedback Templates (DFT's)	x	
Managing target groups on the server	x	x
Managing projects on the server	x	x

First time access after installing the Metatude Dialogue Server:

During the installation of the Dialogue Server one is asked to enter an administrator password.

The administrator can use this password in combination with the username 'Administrator' to log in to the Dialogue Server

Overview of users

After you log in as an Administrator with the Project Manager, you will see six tabs. One of these tabs says **Users**. If you click this tab, the system presents an overview of all the users in the system. You can see the name of the user, the status (active or inactive) and whether the user has administrator rights. The overview can be sorted by clicking **Name**, **Status** or **Rights**.

Each user can be either active or inactive. Active users are allowed to login to the Dialogue Server, whereas inactive users are not. This feature makes it possible to temporarily deny access to the Dialogue Server.

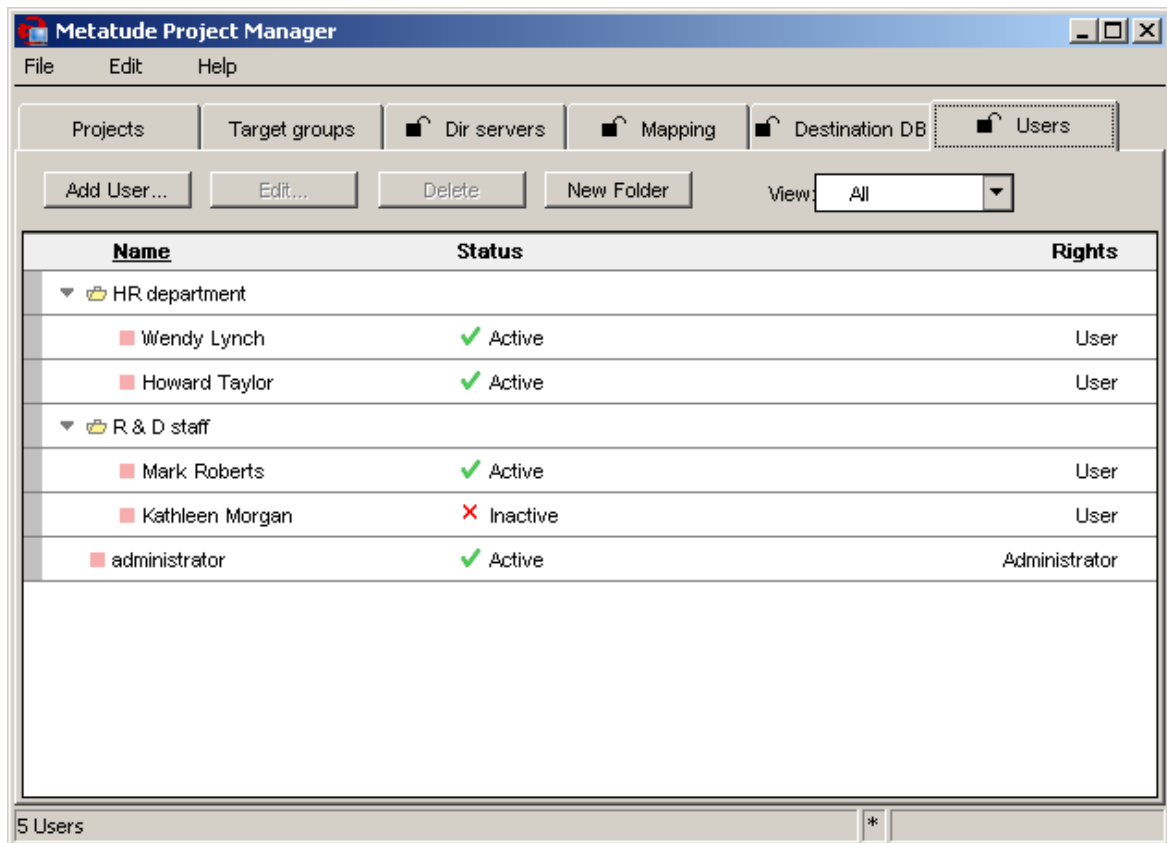


Figure 1: Overview of users

Users can be organized in folders. In the operations bar you can click the **New folder** button to create a new folder. A folder can be deleted by selecting the folder and clicking the **Delete** button. The name of a folder can be edited by selecting the folder and clicking the **Edit** button.

Folders can be opened and closed. When a folder is open, all users within that folder are presented in a list. To open and close a particular folder, double-click the triangle in front of the folder name. The triangle is pointed to the right when a folder is closed and pointed to the bottom when it is opened. If a folder is empty, it cannot be opened.

Adding new users

An administrator can create a new user by clicking the **Add User** button in the operation bar. A window is displayed in which you can enter username and password. You can enter which rights the user should have and whether the user is active or not. Only if you make the user 'active' does he have access to the system. After clicking the **OK** button, the new user is created. Clicking the **Cancel** button cancels the operation: no new user is created. You can organize new users by dragging them to other folders. You can drag a user by clicking the gray area left of the username and pressing the mouse while moving it.

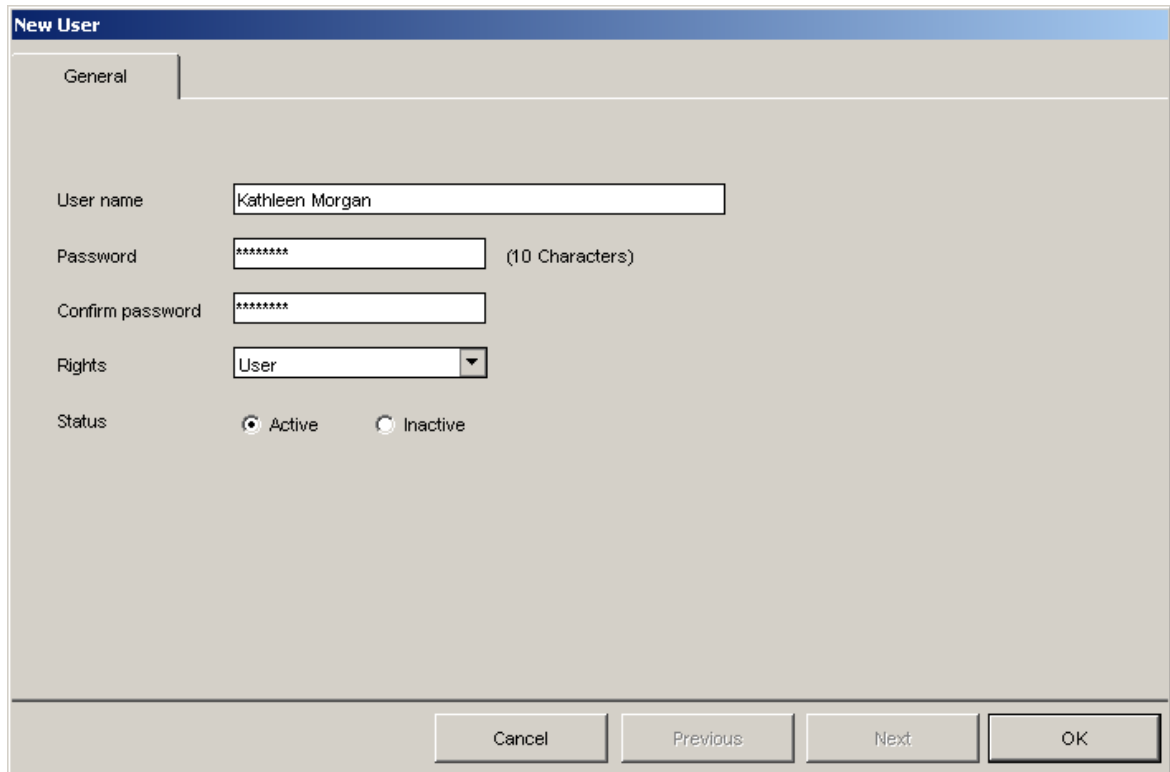
A screenshot of the 'New User' dialog box. It has a title bar 'New User' and a 'General' tab. The form contains the following fields: 'User name' with the text 'Kathleen Morgan'; 'Password' with masked characters '*****' and a note '(10 Characters)'; 'Confirm password' with masked characters '*****'; 'Rights' with a dropdown menu showing 'User'; and 'Status' with two radio buttons, 'Active' (selected) and 'Inactive'. At the bottom, there are four buttons: 'Cancel', 'Previous', 'Next', and 'OK'.

Figure 2: Creating a new user.

Editing and deleting an existing user

You can edit a user if you select it and click the **Edit** button in the operations bar. A window is presented (much like the window for creating a user) where you can make the necessary changes. After clicking the **OK** button, the changes are saved. At any time you can click the **Cancel** button to cancel the operation. In which case, the changes are not saved.

You can delete a user if you select it and click the **Delete** button in the operations bar. If you delete a user, the system double-checks if you really want to delete the user. If the status of the user is active, you can choose to inactivate the user rather than deleting it.

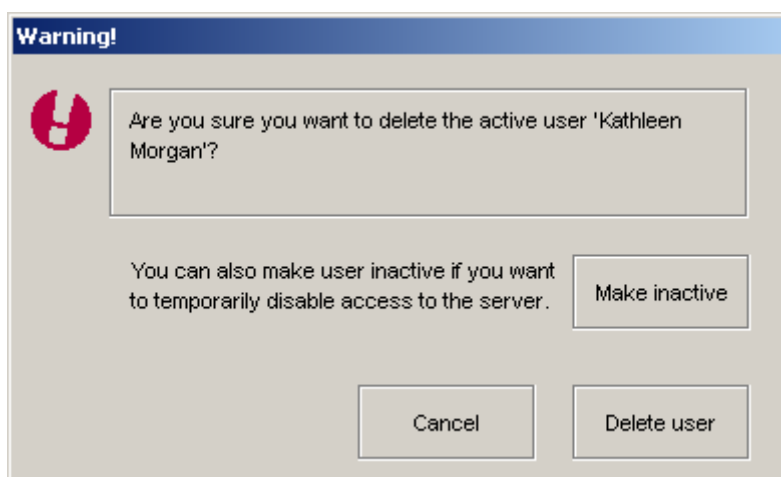
A screenshot of a 'Warning!' dialog box. It features a red warning icon on the left. The main text asks: 'Are you sure you want to delete the active user 'Kathleen Morgan'?'. Below this, a smaller text block says: 'You can also make user inactive if you want to temporarily disable access to the server.' To the right of this text is a 'Make inactive' button. At the bottom, there are two buttons: 'Cancel' and 'Delete user'.

Figure 3: Deleting a user

The system always checks if there is at least one active administrator. Without an active administrator there is no one that can manage users and user rights. The system will not allow you to delete the last active administrator.

2.4 Connecting datasources

This section describes how to make connections with databases and directories. These functions are only accessible for administrators.

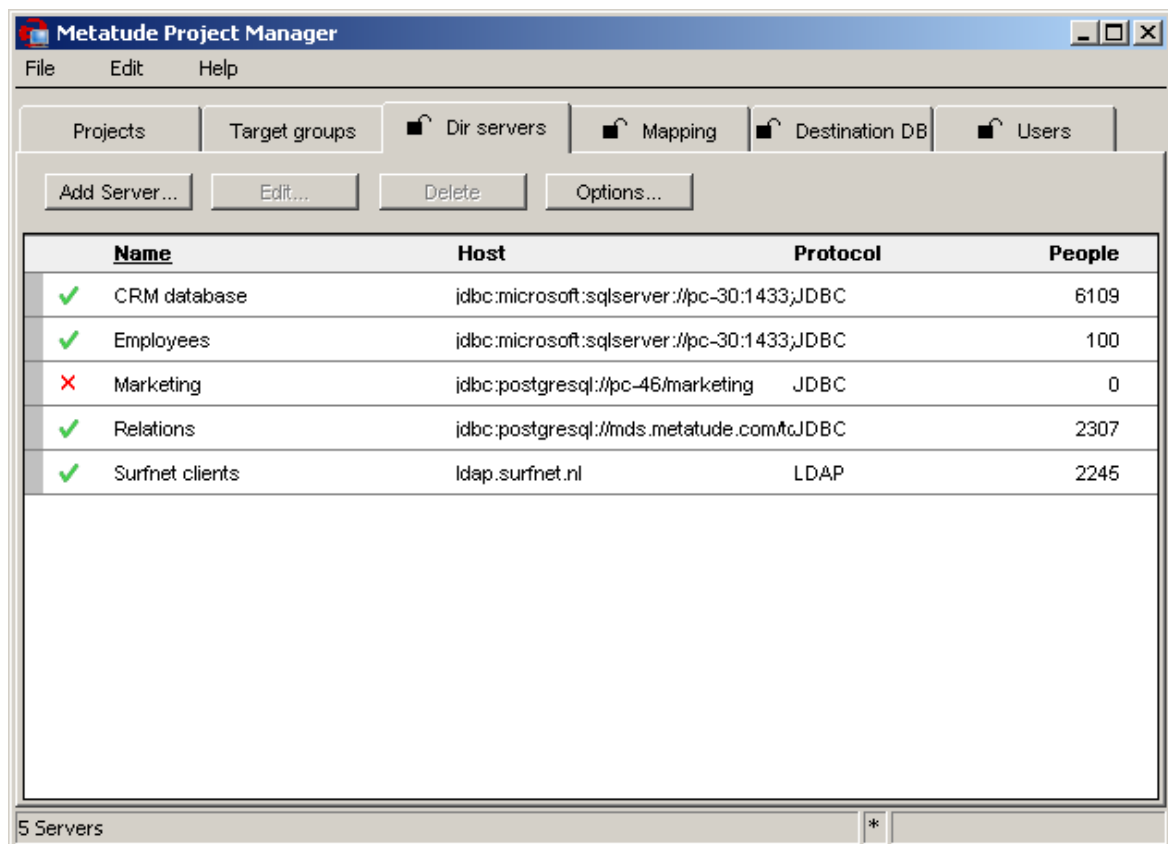
With the Project Manager you can connect to LDAP- directories or databases with stakeholder information in your organization, for example customer relation databases or HRM databases. Once you have done this, all the people in the directories or databases can be approached for online feedback.

LDAP

LDAP is short for Lightweight Directory Access Protocol. LDAP is a software protocol to enable anyone to locate organizations, individuals and other resources in a network, whether on the internet or on a corporate intranet. A server that supports the LDAP protocol can be addressed in a standard way by other applications to locate resources. In the case of Metatude it is used to retrieve information on employees and customers to be able to approach them. Many products and platforms support the LDAP protocol e.g.: Windows Active Directory, Novell NDS and Lotus Notes. This means that when users are stored in these applications other applications can use this information as well.

Overview of databases and directories

- Click the tab **Dir servers**. The system presents an overview of all connected databases and directories.
- You can see the **Name** of the directory, the location or name of the server (**Host**) and how many **People** are located in each of the directories. If the information on a server is incorrect, the Project Manager displays the message: **server unavailable** instead of the number of people in the directory. The overview can be sorted by clicking **Name**, **Host** or **People**.



The screenshot shows the 'Metatude Project Manager' window with the 'Dir servers' tab selected. The window has a menu bar (File, Edit, Help) and a toolbar with buttons for 'Add Server...', 'Edit...', 'Delete', and 'Options...'. Below the toolbar is a table with four columns: 'Name', 'Host', 'Protocol', and 'People'. The table lists five entries: 'CRM database', 'Employees', 'Marketing', 'Relations', and 'Surfnet clients'. The 'Marketing' entry is marked with a red 'X' and has 0 people, while the others are marked with green checkmarks. The status bar at the bottom indicates '5 Servers'.

Name	Host	Protocol	People
✓ CRM database	jdbc:microsoft:sqlserver://pc-30:1433;	JDBC	6109
✓ Employees	jdbc:microsoft:sqlserver://pc-30:1433;	JDBC	100
✗ Marketing	jdbc:postgresql://pc-46/marketing	JDBC	0
✓ Relations	jdbc:postgresql://mds.metatude.com/	JDBC	2307
✓ Surfnet clients	ldap.surfnet.nl	LDAP	2245

Figure 4: Overview of available directories

To create a new directory connection, click the **Add Server** button in the operation bar. A two-step wizard appears where you can fill out the details of the new directory (step 1) and can indicate what attributes are present.

Choose database (JDBC) or directory server (LDAP)

The first step in adding a new directory is providing the details to connect to a database or directory. If you want to connect to a database, you choose the protocol '**JDBC**'. If you want to connect to an LDAP-directory, you choose the protocol '**LDAP**'. The other information that needs to be entered is different for both protocols. First we'll explain how to add an LDAP-directory after which we will explain how to add a database. The second step is the same for both protocols.

2.5 Custom attributes

Attribute types

Each entry in an LDAP server has various attributes. The different columns in a database record can also be seen as attributes. Each of these attributes has a data type associated with it. For an attribute of a record in a database, the Project Manager recognizes the types **string**, **number**, **date** or **boolean**. Two additional types are defined. These are the **name** and **e-mail**. The Project manager uses these additional types to personalize the invitations and to send them to the stakeholders.

Custom attribute types

You can define new attribute types and assign these to attributes in databases and directories where Metatude connects to. These new attribute types are called 'custom attributes'. Custom attributes assigned to different databases and directories can be identified as containing the same information. If in one Metatude project multiple target groups from different databases are involved, the custom attribute information will identify similar attributes across these different databases. The Metatude software will store similar attributes of the stakeholders (attributes that have the same custom type associated with them) in one column and therefore make analysis on the data much easier.

Personalize invitations

Custom attributes can also be used to personalize the invitations that are sent by e-mail to the stakeholders. An example is if you have different databases with stakeholder information, but in all databases there is an attribute that indicates the gender of the stakeholders. If you want this information to be stored in the same place (column) in the result files or if you want to use this attribute in an invitation e-mail, you can define the custom attribute 'gender' and assign this custom attribute to the gender attribute in the different databases.

To define a new custom attribute, click on the button **Options** in the **directory server overview**. This launches a window where all defined attributes are listed.

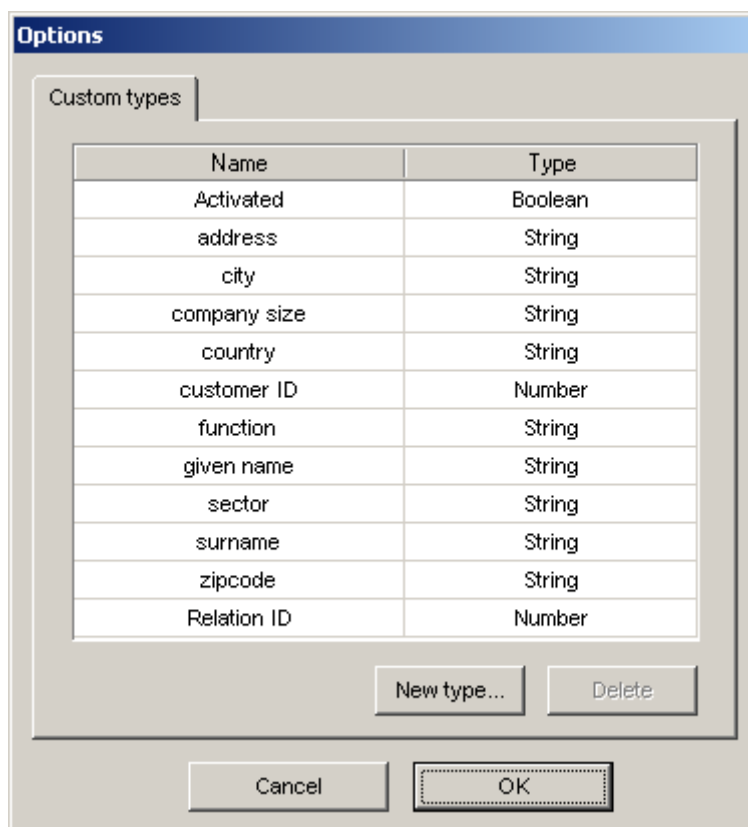


Figure 5: Overview of custom attributes

To add a new custom attribute, click on the button **New type**. A new line will be added in the overview. You can type the name of the new custom attribute.

Data type

Next to the name, you specify the data type of the custom attribute. The custom attribute can only be assigned to attributes of stakeholders that have the same data type as the one you specify. You can choose the data types **string**, **number**, **date** and **boolean**. Attributes in a directory server are considered to be of the data type **string**.

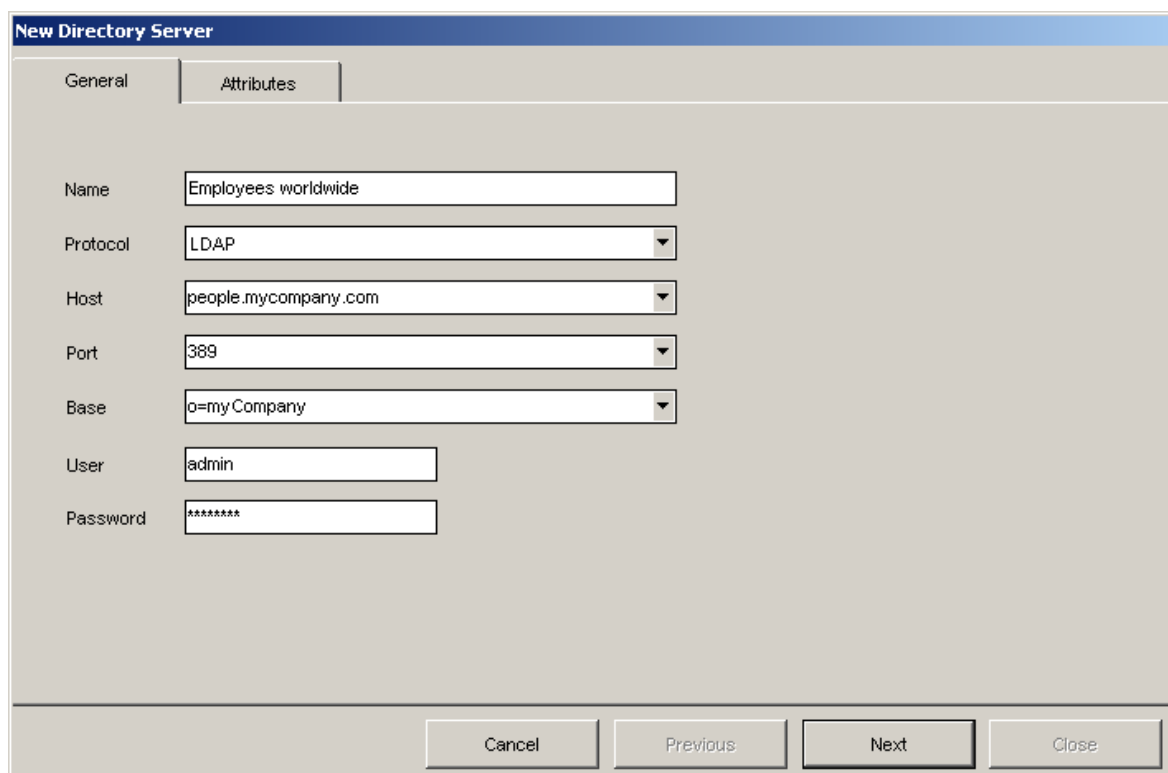
Click the button **OK** and the new custom attribute has been added to the list. You can remove a custom attribute from the overview by selecting it and by clicking the button **Delete**. A custom attribute can not be removed when it is still in use by directory servers.

When connecting to new directory servers you can assign each custom type to any attribute.

2.6 Adding an LDAP-directory

After giving the directory server a name and choosing the protocol 'LDAP', the following information is required:

- **Name:** the name under which Metatude will store the connection.
- **Protocol:** choose LDAP for connecting a directory server
- **Host:** the location of the server. This can be a name or an IP-address.
- **Port:** the port the Directory runs on. Only fill this out if this is a different port then the default value (389).
- **Base:** where to start looking for people in the LDAP directory tree.
- **User:** the username to access the directory. Check the manual of the directory server for the exact format. Usually the username has to be provided as a dn. (distinguished name)
- **Password:** the password to access the directory.



The screenshot shows a 'New Directory Server' dialog box with a 'General' tab selected. The fields are filled with the following values: Name: 'Employees worldwide', Protocol: 'LDAP', Host: 'people.mycompany.com', Port: '389', Base: 'o=myCompany', User: 'admin', and Password: '*****'. The 'Attributes' tab is also visible but not selected. At the bottom, there are four buttons: 'Cancel', 'Previous', 'Next', and 'Close'.

Figure 6: Adding a new directory step 1: Details of the LDAP directory

License restrictions

The license for the Metatude Dialogue Server (MDS) has a set number of stakeholders that may be connected. When connecting a new directory, the total entries will be counted, starting from the 'base'. Be sure to enter the correct base. If you are trying to connect a new directory to the project manager and the total number of stakeholders (of all connected directories) exceeds the licensed amount, the system will refuse and give an error message. For information on extending your license go to: <http://www.metatude.com>

Dialogue Server configuration

On the MDS, the maximum number of stakeholders from LDAP directory servers can be adjusted. The default number is 5500 stakeholders. If you have more stakeholders in your LDAP directories, you need to adjust this value on the MDS. Please see the manual of the MDS for more information.

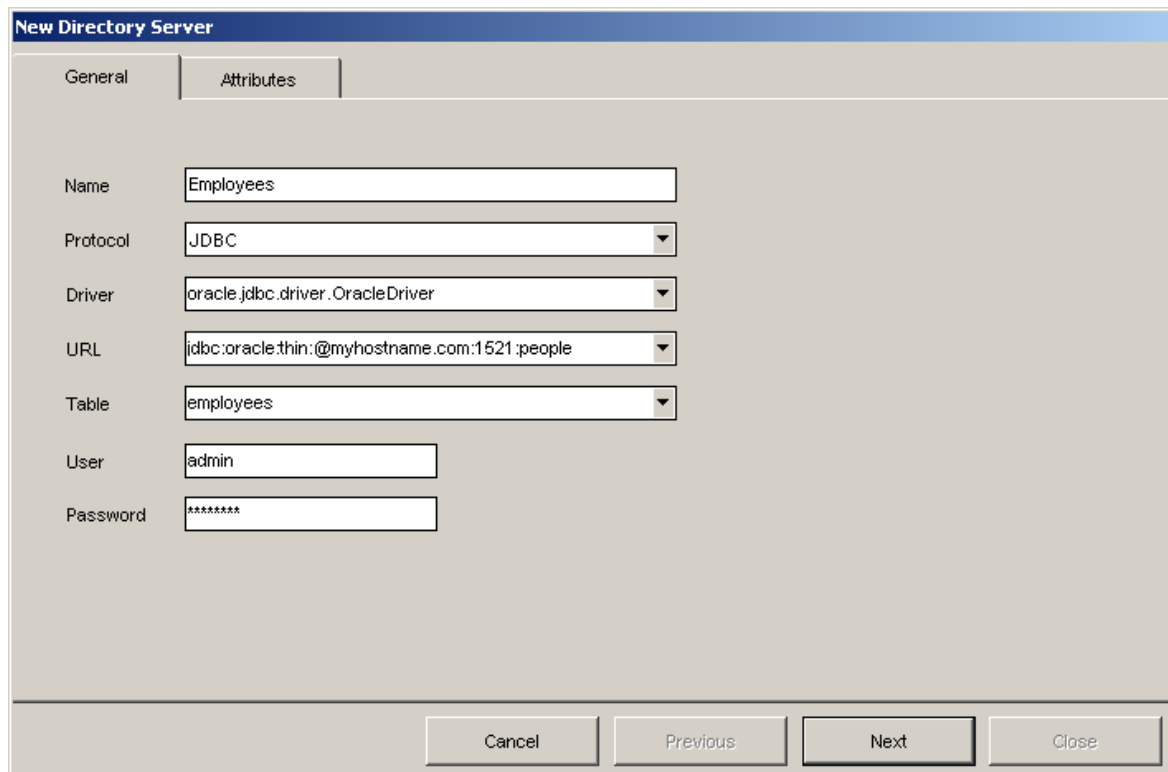
After you have provided this data and click the button **next**, the application tries to connect to the LDAP server. When this succeeds, the second step of the wizard will show a list of the attributes stored in the directory.

2.7 Adding a database

Various databases ship with JDBC drivers. You can use these drivers to connect a database to the Metatude suite. At this moment, Metatude software ships with JDBC drivers for **Oracle**, **IBM DB2**, **Microsoft SQL Server** and **PostgreSQL** databases. Below you find a description of how to connect these two databases. You can connect to other databases through ODBC. If you use an ODBC connection to a database, you will have to make use of the JDBC-ODBC driver that is shipped with the Metatude software. At the end of this chapter, an overview of how to install and use third party JDBC drivers for connecting other databases to the Metatude suite is presented. Please note that third party drivers have not been tested extensively, and therefore are not supported.

The Metatude software supports three different charactersets. These are ISO-8859-1 for western European languages and UTF-8 and UCS-2 for all languages. Your stakeholder database should be encoded using one of these charactersets or an alias or subset. If you use ODBC for connecting to a database, then the system automatically switches to the ISO-8859-1 characterset. You cannot use an Unicode database (UTF-8 or UCS-2) when using ODBC.

Connect a database using shipped JDBC drivers



The screenshot shows a 'New Directory Server' dialog box with a 'General' tab. The fields and their values are as follows:

Field	Value
Name	Employees
Protocol	JDBC
Driver	oracle.jdbc.driver.OracleDriver
URL	jdbc:oracle:thin:@myhostname.com:1521:people
Table	employees
User	admin
Password	*****

At the bottom of the dialog are four buttons: Cancel, Previous, Next, and Close.

Figure 7: Adding a new directory step 1: Details of the database

Important:

The values you fill out in the **Driver:** fields are **Case-Sensitive**, and have to be filled out in the correct case.

All **URLs** that you fill out are relative to the location of the **Metatude Dialogue Server (MDS)**. This means that if you connect to a database that resides on the MDS you can use 'localhost' as the hostname. Also the MDS needs to be able to connect to the stakeholder databases using TCP/IP in case of a JDBC connection or ODBC in case of an ODBC connection.

General information:

- **Name:** The name that you wish to give this connection
- **Protocol:** Choose JDBC
- **Table:** the name of the table in the database with the relevant information
- **User:** the username to access the database.
- **Password:** the password to access the database.

Oracle Database:

- **Driver:** Fill out `oracle.jdbc.driver.OracleDriver` here (case sensitive).
- **URL:** The URL is as follows: `jdbc:oracle:thin:@<hostname>:<port>:<database name>`
- **Table:** The table name needs to be entered in all UPPERCASE characters

The hostname can also be an IP address. If you called the database StakeholderDB and it is running on port 1521 (the default Oracle port) on a machine with IP address 192.168.84.16, the url is: `jdbc:oracle:thin:@192.168.84.16:1521:StakeholderDB`.

Microsoft SQL Server database:

- **Driver:** Fill out `com.microsoft.jdbc.sqlserver.SQLServerDriver` here (case sensitive).
- **URL:** The URL is as follows:
`jdbc:microsoft:sqlserver://<hostname>:<Port>;databaseName=<database name>;selectMethod=cursor`

The hostname can also be an IP address. The default port number for Microsoft SQL Server is 1433. So if you called the database StakeholderDB and it is running on a machine with IP address 192.168.84.16, the url is

`jdbc:microsoft:sqlserver://192.168.84.16:1433;databaseName=StakeholderDB;selectMethod=cursor`

Please note that you cannot use Windows authentication to connect to an SQL Server database. You need to access any SQL Server database using SQL Server authentication. If your SQL Server is not installed to use SQL Server authentication, then you can try to use ODBC to connect to this database (see below).

IBM DB2 database:

- **Driver:** Fill out `com.ibm.db2.jcc.DB2Driver` here (case sensitive).
- **URL:** The URL is as follows: `jdbc:db2://<hostname>:<port>/<database name>`

The hostname can also be an IP address. The default port number for IBM DB2 is 50000. So if you called the database StakeholderDB and it is running on a machine with IP address 192.168.84.16, the url is `jdbc:db2://192.168.84.16:50000/StakeholderDB`

PostgreSQL database:

- **Driver:** Fill out `org.postgresql.Driver` here (case sensitive).
- **URL:** The URL is as follows: `jdbc:postgresql://<hostname>:<port>/<database name>`

The hostname can also be an IP address. The port number only has to be given when it is another value than the default value, which is 5432. So if you called the database StakeholderDB and it is running on a machine with IP address 192.168.84.16, the url is

`jdbc:postgresql://192.168.84.16:5432/StakeholderDB`

Other ODBC databases:

First, create an ODBC connection to your database, then fill out the following information:

- **Driver:** Fill out **sun.jdbc.odbc.JdbcOdbcDriver** here (case sensitive).
- **URL:** The URL is as follows: **jdbc:odbc:Name**

Here Name is the name you have given to your ODBC connection.

Summary:**Database type: Oracle**

Driver: oracle.jdbc.driver.OracleDriver

URL: jdbc:oracle:thin:@<hostname>:<port>:<database name>

Database type: Microsoft SQL Server

Driver: com.microsoft.jdbc.sqlserver.SQLServerDriver

URL: jdbc:microsoft:sqlserver://<hostname>:<Port>;
databaseName=<database name>;selectMethod=cursor

Database type: IBM DB2

Driver: com.ibm.db2.jcc.DB2Driver

URL: jdbc:db2://<hostname>:<port>/<database name>

Database type: PostgreSQL

Driver: org.postgresql.Driver

URL: jdbc:postgresql://<hostname>:<port>/<database name>

Database Type: ODBC

Driver: sun.jdbc.odbc.JdbcOdbcDriver

URL: jdbc:odbc:<connection name>

After you have provided this data and click the button Next, the application tries to connect to the database. When this succeeds, the second step of the wizard will show a list of the attributes stored in the database.

Installing JDBC drivers on a Windows OS:

If you installed the Metatude Dialogue Server (MDS) with default options in the installer, then the MDS resides on your harddrive in the directory *C:\Program Files\Metatude\Metatude Dialogue Server*. A Java Runtime Environment (JRE) is also installed when installing the MDS. This is installed to *C:\Program Files\Metatude\Metatude Dialogue Server\jre* per default. To install a JDBC driver, you have to create a directory called *ext* in the directory *C:\Program Files\Metatude\Metatude Dialogue Server\jre\lib*. You then have to copy the JDBC drivers to this newly created directory (*C:\Program Files\Metatude\Metatude Dialogue Server\jre\lib\ext*). The JDBC drivers for a database are usually one or a few files that can be recognized by the extension *.jar*. You now have to restart the MDS. The installed drivers will now automatically be found and can be used directly.

Installing JDBC drivers on Unix OS'es uses the same method as described for a Windows OS. The default installation of the MDS resides in */opt/mds*.

2.8 List with attributes

The attributes are presented in a table with five columns. The second column ('attribute') shows the attributes from the directory. In the other four columns additional information on the attributes can be entered. This information enables users to define target groups. The software will store the information, so it only needs to be entered once.

<input type="checkbox"/> Use	Attribute	Readable name	Type	Value translation
<input checked="" type="checkbox"/>	givenname	given name	given name	<input type="checkbox"/>
<input checked="" type="checkbox"/>	surname	surname	Name	<input type="checkbox"/>
<input checked="" type="checkbox"/>	location_code	location_code	String	<input type="checkbox"/>
<input checked="" type="checkbox"/>	company_id	company_id	Number	<input checked="" type="checkbox"/> Edit...
<input checked="" type="checkbox"/>	telephone	telephone	String	<input type="checkbox"/>
<input checked="" type="checkbox"/>	fax	fax	String	<input type="checkbox"/>
<input checked="" type="checkbox"/>	mobile	mobile	String	<input type="checkbox"/>
<input checked="" type="checkbox"/>	mail	mail	Email	<input type="checkbox"/>
<input checked="" type="checkbox"/>	function_name	function	function	<input type="checkbox"/>

Unique Id:

Buttons: Cancel, Previous, Next, OK

Figure 8: Explanation on the four rows and how to use them

1. Use

For every attribute in the directory the administrator can indicate whether or not users are permitted to use this information when defining target groups. Users will use these attributes to define target groups for their projects. If some attributes are not suited for defining target groups, simply leave the check box unchecked. Users will then not be able to define target groups based on these attributes. For every attribute that is suited for defining target groups, simply check the check box.

2. Readable name

In the column **Readable name** you can assign an attribute a name that can easily be understood by users. This readable name is a short, clear description of what the specific attribute mean. LDAP has many abbreviations (for instance 'c' for country and 'ou' for organizational unit) that are often unfamiliar to users. When making rules to define target groups, Metatude will display the readable names.

3. Type

In the column Type you can indicate what kind of data the attribute holds. The Metatude software recognizes the following datatypes:

- String
- Email
- Name
- Number
- Date
- Boolean
- Custom attribute

When you check the 'use' box for an attribute, the MPM automatically shows what of datatype it is. You can make different selections for numbers and for textual information. With numbers, for example, you can define the rule 'more than', which is not possible with textual information. When custom attributes have been defined, they show in the drop down menu. These custom attributes can be assigned to any datatype. In order to invite people to give their feedback, the Metatude software needs to have their name and e-mail address. Please make sure that any name and e-mail information is in the directory and mark the appropriate attribute with the name and E-mail types, that are in the drop-down menu also. You can only assign the type e-mail and the type name to a database field of the type string.

4. Value translation

In the last column you can indicate if the attribute has a value that doesn't clearly express the contents. For example, in a directory the gender of people is stored often using values. In this case you can indicate that the numerical values used actually stand for 'man' and 'woman'. Simply indicate that you would like to translate values by clicking the checkbox in this column. Automatically an Edit button appears to the right of the checkbox. If you click this Edit button, the system presents a list in which you can indicate the original values (the ones stored in the directory) and the values that best describe the data. You can enter the values manually, or you can provide the name of a lookup table in the stakeholder database.

Unique ID

The last step in adding a database server is choosing a unique ID. The Metatude software uses this unique ID to deduplicate invitations. If multiple target groups are invited to join a particular questionnaire, these values must be unique. The software filters out duplicates. Take for example a situation where there are multiple employee databases and some people will be listed in multiple databases. We can avoid people being invited twice if we would have a unique ID that is the same for all databases, for instance a phone number or e-mail address.

Only when adding a database the administrator has to choose a unique ID. Be carefull when choosing the unique ID. Not selecting the righth unique ID, causes people to be excluded unintentially. If not sure, use the email-adress, since this is unique to a person.

After all the four columns have been filled out for every attribute, you can store the information by clicking OK. The system returns to the overview of connected directories, this time including the directory you just added.

2.9 Value Translation

When you choose value translation for an attribute in a directory server, and click the edit button, you will be provided with an interface to set up value translation.

Edit value translation for company_id

☒ Use lookup table

Table name:

Value column: ▼

Translation column: ▼

Value	Translation
9	Ponnet
2	AMEV
4	Arcadis NV
42	AEGON Nederland N.V.
5	CNB
6	DAF Trucks N.V.
7	Grontmij
8	HCN

25 out of 783 record(s)

Figure 9: Value translation

Entering values manually

You can provide the values and their translations manually. To do this, uncheck the *use lookup table* checkbox. Click on the button **add** to add a new value / translation pair. The value is the value that is present in the stakeholders directory and the translation is the name that you wish to give this value. When you are done adding value / translation pairs, click the **OK** button. Each value that is found in the stakeholder directory will be translated if a matching value is found in the list that you create.

Using a lookup table

Check the *use lookup table* checkbox. You can then enter the name of the table that contains the values and translations for the value translation. This table has to reside in the same database as the table that contains the stakeholders. The connection url, username and password that you have provided in the *general* tab of the directory server will be used to connect to the table. Click the **connect** button to connect to the table. You will then be provided with a list of the columns in the table. You can choose which column holds the values and which column holds the translations. Click on the **preview** button to see a preview of the value translation list. Each value for the attribute in the stakeholder table will be translated using the value and translation columns of the value translation table that you have provided.

2.10 Editing and deleting directories

You can edit information of a connected database or directory by selecting it and clicking the **Edit** button in the operations bar. A window will be presented (much like the window for adding a new directory) in which you can make the necessary changes. After clicking the **OK** button, the changes are saved. At any time you can click the **Cancel** button to cancel the operation. In this case, the changes are not saved. You can remove a database or directory from the list of connected directories if you select it and click the **Delete** button in the operations bar. A directory can not be deleted when there are target groups defined from this directory. If there are still target groups, these must be deleted first.

3 Starting

3.1 The basics

Functionality

There are two types of users: regular users and administrators.

With the Metatude Project Manager four functions on the central server can be managed:

1. Adding, editing and deleting users.
2. Connecting new databases and directories.
3. Creating, editing and deleting target groups.
4. Creating and managing projects.

The first two functions are only for administrators, the last two can be performed by any user.

Users and Administrators

Metatude recognizes two types of 'users' within your organization: 'administrators' and regular 'users'. An administrator has access to all four functions and will usually be someone from the IS department. A user has access to the last two functions mentioned above. Users will generally be HRM managers, marketing managers and consultants that have an interest in collecting stakeholder feedback. The last two functions can be used to execute a project from start to end without any help from others.

Steps to complete a project

To successfully complete your first project, these steps have to be followed:

Using the **Metatude Dialogue Designer**:

1. Design a dialogue (see the manual for the Metatude Dialogue Designer for more information)

Using the **Metatude Project manager**:

2. Connect to a directory server or a database containing stakeholder information. These connections can only be made by administrators.
3. Define one or more target groups from the information contained in the directory server or database
4. Create a new project. Choose the dialogue that you have designed and write an invitation message for your stakeholders.
5. After the stakeholders have filled out the dialogue, you can download the results.

The steps 3, 4 and 5 will be described in the following chapters. To complete these steps, the administrator in your organization will give out usernames and passwords.

3.2 Connecting to the Metatude Dialogue Server

Click the desktop icon to start the Metatude Project Manager, a screen will appear requesting the name of the **Server** (or IP address) as well as your **Username** and **Password** to connect you to the Metatude Dialogue Server (this information can be supplied by your administrator).

The MPM is a client of the server. Multiple clients can be connected to the server concurrently (multi-user functionality) which means several users can work with the MPM at the same time. The connection from the Project Manager to the Dialogue Server is made via the network over tcp/ip.

After entering the information you can connect to the dialogue server by pressing the **OK** button. If you entered the correct information and have established a connection to the server, the Project Manager will accept your attempt to login and display the first window of the application.

The Project Manager will remember the last server you logged into and enter by default this data in the connection window the next time a user tries to make a connection. The Project Manager also remembers the user name that you used to login the last time, and will also enter it in the connection window. This means that if you login to the same server as the last server that you used, you only have to enter the password.

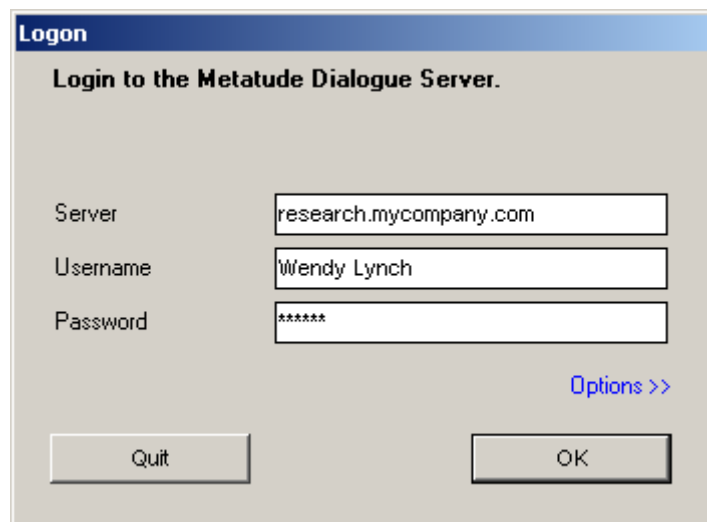


Figure 10: Login screen

If the Project Manager cannot connect to the central Metatude Dialogue Server, there are several possible reasons for this. When an attempt to login fails or there is no sign of activity, the Project Manager will display one of the following error reports:

1. "The server with name / IP-address [name/IP-address] was not found."

This error will occur when the server is not found on the network, or when the machine with that address was found but is not running the MDS on the port number where it is expected to be.

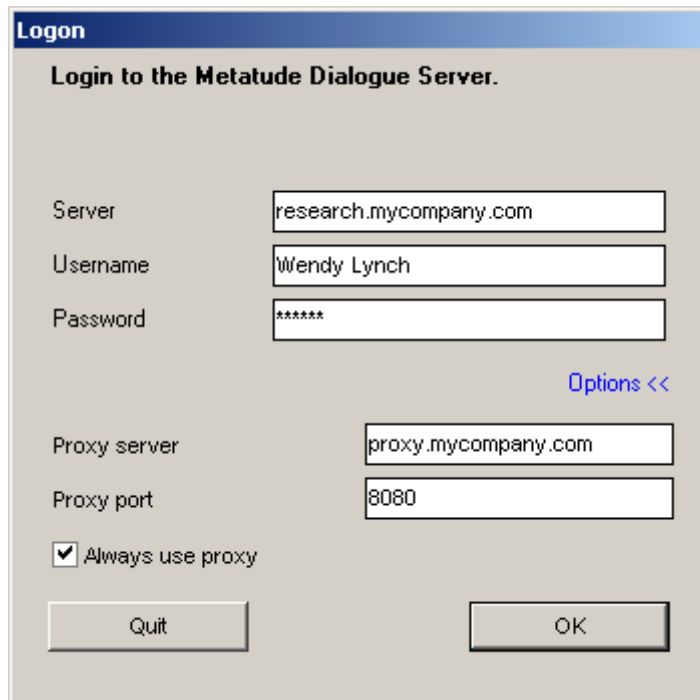
2. "Incorrect login: your username and/or password are incorrect."

This error report will be given when the server was found, and a network connection was established, but the server did not accept the login. The user will not be told whether the problem is in the username or password.

Proxy server

Metatude Project Manager can connect to a Metatude Dialogue Server even when the MPM is located behind a proxy/firewall. In this case, click options in the login window. This will expand the window and show other connection parameters. If a proxy server address and port is specified, then MPM will try to connect to MDS using the specified address/port as the proxy server's address/port.

If MPM is closed then the proxy server address and port are not stored. However, if the user checks the "Always use proxy" check box, then this value is stored in the preference file when MPM is shut down and in the subsequent login attempts; MPM uses the previously specified proxy address and port to connect to MDS.



The screenshot shows a 'Logon' dialog box titled 'Login to the Metatude Dialogue Server.' It contains the following fields and controls:

- Server:** A text box containing 'research.mycompany.com'.
- Username:** A text box containing 'Wendy Lynch'.
- Password:** A text box containing '*****'.
- Options <<**: A blue text link.
- Proxy server:** A text box containing 'proxy.mycompany.com'.
- Proxy port:** A text box containing '8080'.
- Always use proxy:** A checked checkbox.
- Buttons:** 'Quit' and 'OK' buttons at the bottom.

Figure 11: Login screen when using a proxy server

3.3 Login after connection was broken

After a successful attempt to login, the connection can break down. One of the reasons for this can be that the Dialogue Server deliberately disconnects if the connection was not used for more than 15 minutes,

Either the Project Manager or the Dialogue Server can interrupt the connection. When the Project Manager breaks off the connection, an error report is generated explaining why the connection was broken. In the same window, the application presents an opportunity that allows you to reconnect to the server.

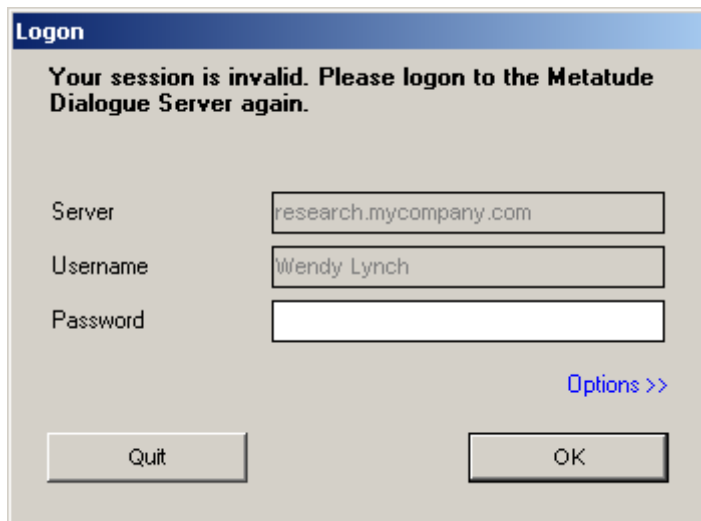


Figure 12: Login screen after the Metatude Project Manager broke the connection

If the server breaks the connection, the Project Manager cannot tell you what happened. The Project Manager will remember the state it was in before the connection was broken, and you will be able to continue your work after you have logged in again.

3.4 Main window

After you have logged into the Metatude Project Manager you'll see the main window which consist of five parts:

1. The menu bar
2. The tab bar
3. The 'operation bar'
4. The content view area
5. The help bar.

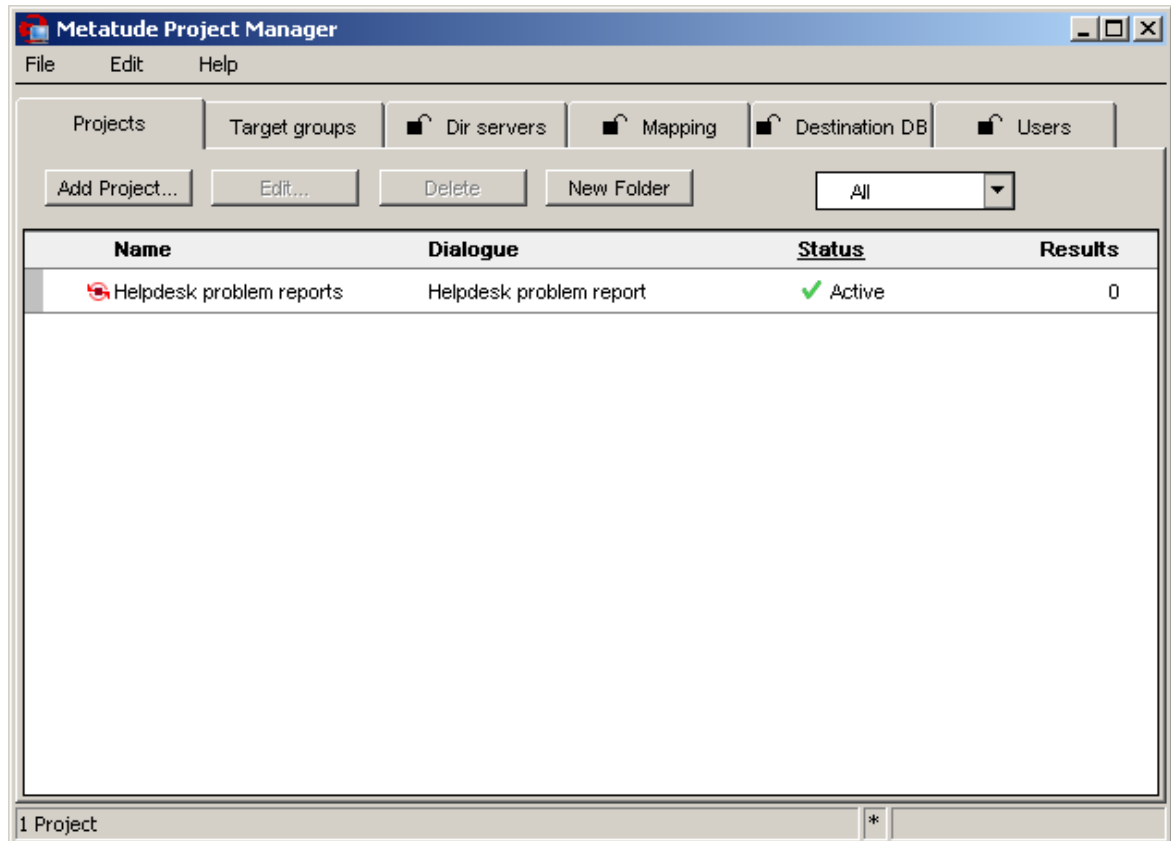


Figure 13: The main window

1. The **menu bar** contains general menus for opening, editing and saving files as well as a help menu in which you can find more information on Metatude and the Project Manager.
2. With the **tab bar** you can switch between the four main functions of the Metatude project manager.
3. The **operation bar** consists of buttons to execute the most common operations. The buttons vary for each tab.
4. The **content view area** is the largest part of the window and shows all the content depending on the tab chosen.
5. The **help bar** provides context sensitive information when performing operations.

4 Target groups

4.1 Creating and editing a target group

Rule based target groups

When collecting stakeholder feedback you need to define those groups of people you want to participate in your survey. With the Project Manager you can create target groups out of the connected databases and directories by defining their characteristics. This is done by selection rules. One rule is, for example, "all employees older than 40". All the attributes in the directories are available for making these rules. Once a target group has been defined, the Metatude software stores this definition. In this way target groups only need to be defined once and can be used for multiple projects.

Dynamic

The target groups are dynamic (the members change over time) because they are rule-based. If, for example, someone turns 40 they will be added to the target group based on the rule "all employees older than 40". Changes in the directories are reflected in the target group population. This means that if the underlying directories are kept up-to-date, the target groups are up-to-date as well. The advantage of these dynamic target groups is that the characteristics (in terms of attributes) of the surveyed population are always the same, which makes the outcomes of research comparable.

4.2 Overview of target groups

On the tab bar there is a section **Target groups**. If you click this tab, the system presents an overview of all the defined target groups. The target groups can be organized in folders. In the operations bar you can click the **New Folder** button to create a new folder. A folder can be deleted by selecting the folder and then clicking the **Delete** button. The name of a folder can be edited by selecting the folder and then clicking the **Edit** button. To open and close a particular folder, double-click the triangle in front of the folder name. The triangle is pointed to the right when a folder is closed and pointed to the bottom when it is opened. When a folder is empty, it cannot be opened.

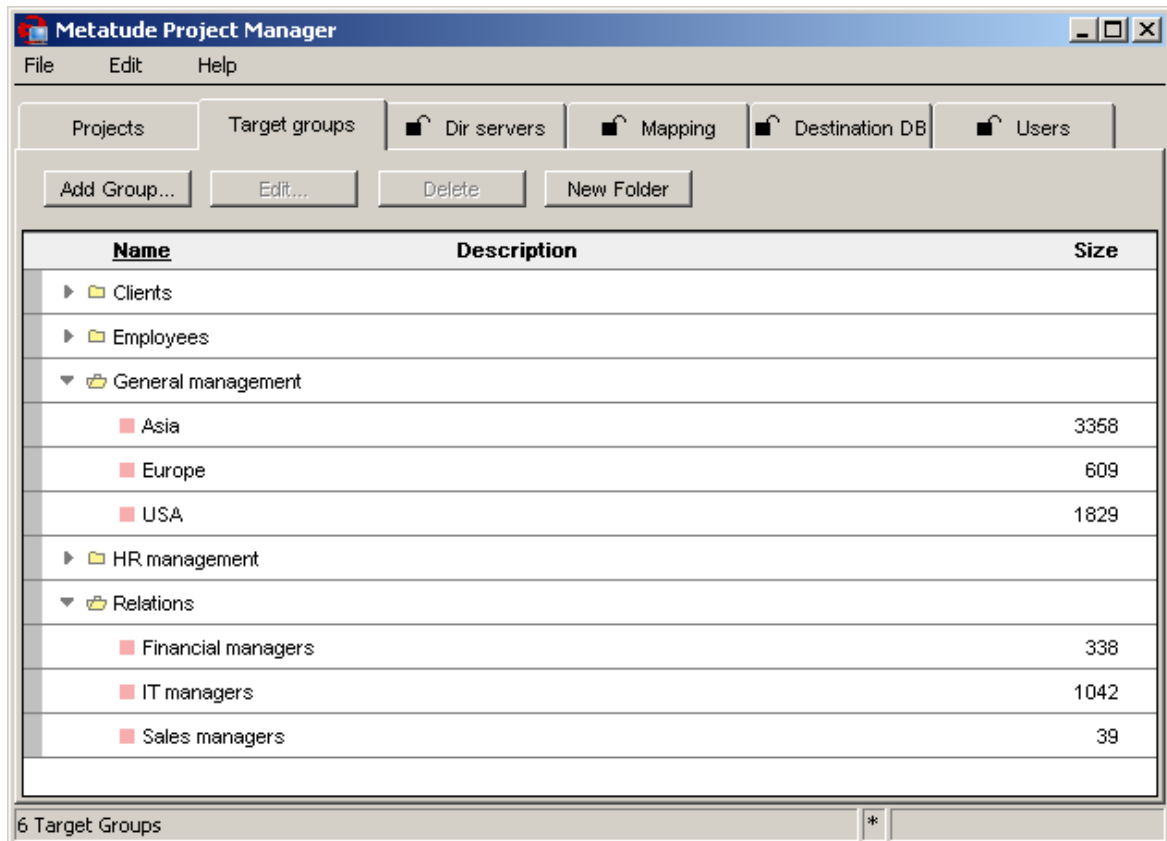
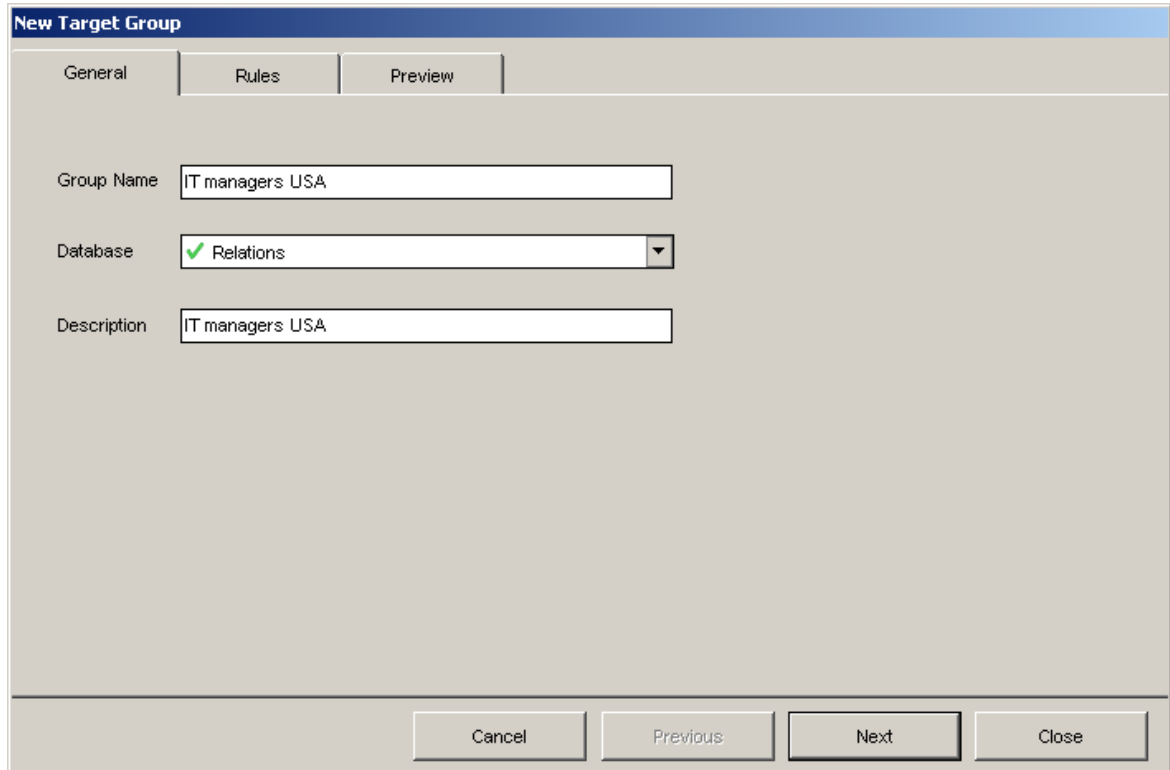


Figure 14: Overview of the defined target groups

In the overview you can see the **Name** that is given to the target group, a **Description** and the number of people the target group currently holds (**Size**). The overview can be sorted by clicking **Name**, **Description** or **Size**.

4.3 Creating a new target group

A new target group can be created by clicking the **Add Group** button in the operation bar. A three-step wizard is displayed which will guide you through the process of defining a target group.



The screenshot shows a dialog box titled "New Target Group". It has three tabs: "General", "Rules", and "Preview". The "General" tab is selected. Inside the "General" tab, there are three input fields: "Group Name" with the text "IT managers USA", "Database" with a dropdown menu showing "Relations" and a green checkmark, and "Description" with the text "IT managers USA". At the bottom of the dialog are four buttons: "Cancel", "Previous", "Next", and "Close".

Figure 15: Defining a new target group step 1: Select **Database** and choose a **Name** and **Description**

In the first step you must indicate the database or directory you want to use for creating a target group. You can do this by selecting one from the dropdown menu. All connected databases and directories are listed in this menu. In the first step you can give the target group you are about to create a **Name** and a **Description**. The **Name** should be relatively short. The **Description** offers somewhat more space to indicate what the characteristics of the target group will be.

New Target Group

General Rules Preview

Insert rule Insert set Delete

function	AND	=	IT Manager
location_code	contains		USA

Update Total matches -

Cancel Previous Next Close

Figure 16: Defining a new target group step 2: Defining rules

The actual work of defining a target group is done in step two. In this step you define the rules that apply to the target group. The system presents a window in which you can make multiple rules. For example "all employees older than 40 and male". This is an example of a rule set. Each row in this window consists of four fields:

1. **Attribute:** the attribute that is the subject of the rule.
2. **Inverse operand:** this field only has two possible values: empty and 'not'. With this operator it is simple to select an opposite selection.
3. **Operand:** field that states the operation you can perform. The different operations you can perform are listed in a dropdown menu. These choices depend on the data type of the attribute.
4. **Value:** here you select or enter a value for the rule

Rule based on dates

If the attribute is a date type, you can make rules based on dates. This can be done in an relative or absolute manner. The absolute manner is to define a target rule that defines that the date be prior to or after a fixed date. The user interface will show a calendar to select this fixed date.

The relative manner is to define that the date must be younger or older than a certain amount of days, weeks or years. The software will take the actual date to calculate the target group. This makes it relative easy to select recent records from a database. If, for example, I have a database where help desk calls are logged, I could easily define a project where I would continuously (every month) ask 100 persons who have had a problem over the last 14 days if these problems are solved. Every month, the system selects a new group of people in the database that fit this description.

4.4 Rules, multiple rules and rule sets

You can use multiple rules to define a target group. You can choose to focus your selection by defining an additional rule that must also be met, or you can choose to broaden your selection by defining another rule that also qualifies people for the target group. Between separate rules there is a line with an operand value that can be either 'and'/'or'.

Multiple rules can be a part of a 'rule set'. Like "older than 40 **and** male". Also a rule set can consist of multiple rule sets. Rule sets give you the opportunity to treat multiple rules as a single rule when defining target groups. Think of it as placing parentheses in an equation.

Number of people in a target group

After you have defined rules, you can calculate how many matches the rules generate by clicking the **Update** button. The total number of people in the target group is indicated to the right of the **Update** button.

Defining rules

You can add rules and rule sets by clicking the **Insert rule** and **Insert set** buttons. To insert a rule in a rule set:

- Select the rule set by clicking the light green bar and then clicking **Insert rule**.
- In the first dropdown menu you can select the attribute that you would like to define a rule on. For instance: 'department'
- In the second menu you can choose **Not** if you want to select a group, for instance 'women' by making a rule which says: gender **Not** = Men.
- In the third dropdown menu you can choose several signs to indicate larger than (>), equal to (=) etc.
- In the fourth 'space' you can type a value such as a number, or if it is a dropdown menu, select the category you want. For example "department = marketing".
- If you want to make a rule set such as "Department = marketing AND country = United States" choose **Insert set**.
- If you want to define a new rule such as "OR country = United States" you choose **Insert rule**.
- Deleting rules and rule sets can be done by selecting them and then clicking the **Delete** button.

Preview

The third window gives a preview of the target group. It shows a small selection of the group. The left side of the window shows the names of the selected people. On the right side you can see two attributes for each person. Via a dropdown menu every attribute can be selected. With this preview you can see the characteristics of the target group. Using the tabs you can change back and forth between **Rules** and **Preview** to change the rules until the target group has the desired characteristics. When you are finished, simply click the **OK** button and the rules are saved. The newly defined target group is now listed in the overview of target groups.

The screenshot shows the 'New Target Group' dialog box with the 'Preview' tab selected. The dialog has three tabs: 'General', 'Rules', and 'Preview'. Below the tabs, there are two dropdown menus for 'name' and 'email'. A table displays a preview of the target group with 15 rows. The table has three columns: 'Relation ID', 'Name', and 'Email'. The 'Email' column shows email addresses for each person. At the bottom right, it says 'Displayed: 25 of 1829'. At the bottom, there are four buttons: 'Cancel', 'Previous', 'Next', and 'OK'.

Relation ID	Name	Email
2	Aalberts	Wim.Aalberts@company.mail
10	Albers	Theun.Albers@company.mail
14	Anker	Paul.Anker@company.mail
15	Apperloo	Ruud.Apperloo@company.mail
18	Armour	Rob.Armour@company.mail
19	Arnoldussen	Emiel.Arnoldussen@company.mail
22	Arts	Hans.Arts@company.mail
30	Bakker	Willem.Bakker@company.mail
34	Bakker	Marten.Bakker@company.mail
35	Balakirsky	Dirk.Balakirsky@company.mail
38	Bassa	Jan.Bassa@company.mail
39	Bastiaens	Jan Peter.Bastiaens@company.mail
42	Baxs	Henk.Baxs@company.mail
50	Bening	Harold.Bening@company.mail

Figure 17: Defining a new target group step 3: Preview

4.5 Editing and deleting target groups

You can edit target groups by selecting them and clicking the **Edit** button in the operations bar. The same wizard is displayed as when creating a target group. You can make the necessary changes. After clicking the **OK** button, the changes are saved. At any time you can click the **Cancel** button to cancel the operation. In this case, the changes are not saved. You can remove a target group from the overview by selecting one and clicking the **Delete** button in the operations bar. A target group can not be deleted when there are inactive or active projects or projects that still have to start that make use of these target groups.

5 Projects

5.1 Overview of projects

After you click the MPM icon on your desktop and have logged on, you'll see the main window with four tabs. The first tab is called **Projects**. If you click this tab, the system presents an overview of all the projects. The projects can be organized in folders. In the operations bar you can click the **New folder** button to create a new folder. A folder can be deleted by selecting the folder and then clicking the **Delete** button. The name of a folder can be edited by selecting the folder and then clicking the **Edit** button. To open and close a particular folder, double-click the triangle in front of the folder name. The triangle is pointed to the right when a folder is closed and pointed to the bottom when it is opened. When a folder is empty, it cannot be opened.

Overview of all projects

In the overview you can see the Name that is given to a project, the name of the Dialogue used in the project, the Status of the project and the number of Results. The overview can be sorted by clicking **Name**, **Dialogue**, **Status** or **Results**. In the operations bar you see a drop down menu called View. Here you can choose to view all projects or only projects of one status (active, inactive, completed etc.).

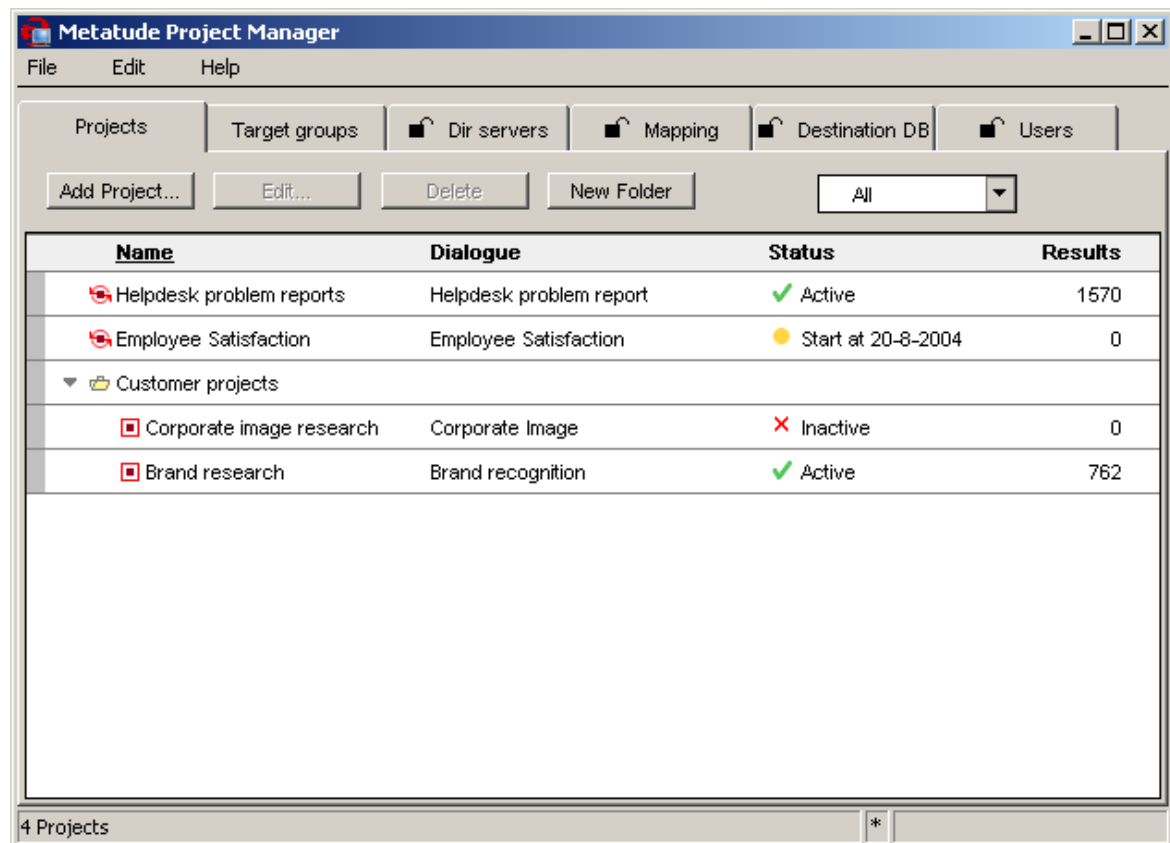


Figure 18: Overview of projects

5.2 Creating and managing projects

When you want to conduct a survey, you need to create a project. Here you can define which dialogue has to be sent to which target groups and when this must happen. After all the information about a project has been defined, the Metatude system executes the survey automatically. It sends out invitations to members of the target group and collects data. It keeps track of response rates and sends out more invitations if needed. At all times during and after the project you can download the results in an appropriate format.

Ad-hoc and continuous projects

Metatude supports 2 kinds of projects:

- 1) Ad-hoc projects
- 2) Continuous projects

An ad-hoc is a one time project, people are invited only once. A continuous project is a project that runs for a longer time and people are invited in different periods. A continuous project is a research project that spans two or more (or even an indefinite number of) periods. Defining a continuous project allows an organisation to track developments over time. For example: If you want to measure employee satisfaction, you can do this once a year for everybody in your organization, but you can also invite every month just a part of the employees.

Flexibility of continuous projects

With Metatude you only have to define a continuous project once, and the software takes care of the rest. Each period it collects responses from pre-defined target groups in the quantities set by you. Not only is a continuous project easy to define, it is also flexible enough to meet changing conditions and requirements:

- You don't have to define an end date
- You can add and delete target groups from an active continuous project
- You can change the quantities of response you want from each target group
- You can change the email invitation text anytime
- All changes take effect immediately

5.2.1 General information

A new project can be created by clicking the **Add Project** button in the operation bar. A six-step wizard is presented which will guide you through the process of creating a project.

In the first step you first have to decide if the project is an **Ad-hoc Research** project or a **Continuous Research** project. You can select one of these two choices at the very beginning of the process (on top of the first screen). The general information needed differ among these two type of projects. Underneath the first step of the wizard explained for both project types.

Ad-hoc Research project

The first step in creating a new project is giving it a **Project name**, a **Start** date and a **Status**. The default status is **Starts at**. On the day of the start date you have selected, the status will automatically change to **Active**. The status **Inactive** can be used when some changes need be made before the survey may be conducted, or to put an active project temporarily on hold. However the status should always be changed to **Starts at** before the start date. Otherwise the survey will not be resumed.

You can choose for which **Site** the survey should be conducted. Each site has its own look and feel. The layout of the webpage that contains the survey is tailored to a specific site. Also, a site can have an e-mail template. When such a template is available, the invitation and reminder e-mails that are sent out will be in the layout of the site. An administrator configures the different sites. You can choose any of the sites that has been configured for you.

The screenshot shows a 'New Project' dialog box with a blue header. Below the header are six tabs: 'General', 'Dialogue', 'Target groups', 'Invitation', 'Reminders', and 'Results'. The 'General' tab is selected. The form contains the following fields:

- Project Type:** Two radio buttons. The first is selected and labeled 'Ad - Hoc Research'. The second is labeled 'Continuous Research'.
- Project name:** A text box containing 'Employee Satisfaction Survey'.
- Status:** A dropdown menu with 'Start at' selected.
- Start at:** A date picker showing '20-08-2004'.
- Site:** A dropdown menu with 'Metatude' selected. To the right of the dropdown is the text '(Template available)'.

At the bottom of the dialog are four buttons: 'Cancel', 'Previous', 'Next', and 'Close'.

Figure 19: Creating a new project step 1: General information for an **ad-hoc research project**

Continuous Research project

Also for a continuous project the first step in creating a new project is giving it a **Project name**, a **Start** date and a **Status**. The default status is **Starts at**. On the day of the start date you have selected, the status will automatically change to **Active**. However for a continuous project, you should also specify the **end date**, the **interval** and the **invite respondents again after ... intervals** value.

The **end date** specifies to which date the project will run. After this date no new intervals of research are created and no more invitations to participate are sent out. If you are not sure what the end date will be, you don't have to fill out an end date. You can define an end date later when the project is active, or you just can stop the project immediately by changing the status to **completed**.

The **interval** specifies the frequency with which new intervals are created and new invitations are sent. For instance, if you set the value to 'Every month', the system will invite new respondents every month. The following values can be set:

- Every day
- Every week
- Every two weeks
- Every month
- Every two months
- Every quarter
- Every half year
- Every year

The **invite respondents again after ... intervals** value specifies how long respondents may not be approached for another interval of the continuous research project. Suppose you specify the interval 'Every month' and set this value to 6, then respondents are not invited for at least half a year. Only when there are not enough respondents left to obtain the specified quantities of responses (see 'Target groups'), this value is automatically decreased by the software.

New Project

General | Dialogue | Target groups | Invitation | Reminders | Results

Project Type ☐ Ad - Hoc Research ☒ **Continuous Research**

Project name

Status

Start at

☒ End date

Interval

Invite respondents again after intervals

Site (Template available)

Cancel Previous Next Close

Figure 20: Creating a new project step 1: General information for a **continuous research project**

5.2.2 Setting a dialogue

Step two in creating a project is assigning a dialogue (the dialogue can be designed using the Metatude Dialogue Designer, see 'About this manual'). The dialogue can be assigned by clicking the **Open** button. This button opens a window that allows you to select the appropriate dialogue on your hard drive or network. Once you click **OK**, the dialogue is copied to the central Dialogue Server. When this is completed, you see some dialogue information (name, author, number of questions and language) presented in the window.

You can also copy a dialogue from the server to your hard drive or network (only from an already created project). To do so, click the **Save** button. This opens a window where you can select the drive to copy the dialogue to.

The screenshot shows a 'New Project' window with a 'Dialogue' tab selected. Under 'Active Dialogue', there are five text input fields: 'Name' with 'Employee Satisfaction', 'Author' with 'Wendy Lynch', 'Questions' with '11', 'Encoding' with 'UTF-8', and 'Version' with '2.2'. Below these fields are two buttons: 'Open...' and 'Save as...'. At the bottom of the window are four buttons: 'Cancel', 'Previous', 'Next', and 'Close'.

Figure 21: Creating a new project step 2: Assigning a dialogue

5.2.3 Target groups

The third step in creating a project is selecting target groups. On the left side of the third window you see an overview of all target groups, organized in folders. You can open and close folders the regular way, by double-clicking the triangle in front of them. You can select target groups for the project by selecting them in the left list and click the **Add** button. You can remove target groups from your selection by selecting them from the right list (active target groups) and click the **Remove** button.

Invite all

Next to the **Active Target groups** are three columns. The first one states the **Size** of the target group. The second column contains a drop-down menu per target group, where you can indicate if you want to invite the whole target group, a percentage of the target group or a sample of the target group. If you choose **All**, the whole group will be invited. Only when **All** or **percentage** is chosen, you can use the **reminder functionality**.

Invite percentage

When you choose **Percentage** from the drop-down menu, you can enter the percentage of respondents in the target group that should get an invitation to the survey.

Invite sample

Alternatively, you can not invite the whole target group and set a **Target** size. If you enter a sample size, the Metatude system invites just enough people to collect this volume of response. For instance if you only need 25 responses from the group 'Asia', you define this as the sample size. During the project the software monitors the response rate and sends out extra invitations when needed. To set a sample size, just click the number to edit it.

Target groups	Active Target groups	Size	Options	Target
HR management	IT managers	1042	All	1042
General management	Financial manage	338	Target	50
Relations	Sales managers	39	Percentage (%)	100
IT managers				
Financial managers				
Sales managers				
Clients				
Employees				
Staff				
Management				
IT department				
Executives				
Finance department				
HR department				

Figure 22: Creating a new project step 3: Selecting target groups

5.2.4 Invitation

The fourth step in creating a project is the **Invitation**. In this step you enter the text of an e-mail that will be sent out to the target group when the project starts. On the left side of the wizard is a checkbox **Invite respondents at activation**. By default, this is checked; and invitations will only be sent (by e-mail) when this box is checked.

From e-mail address and name

You can specify the name and the e-mail address that will appear in the e-mail application of the respondents. This information is entered in the From and name textboxes. You can specify only an e-mail address or a combination of an e-mail address and a name. When you also specify a name, this name will show up in the respondent's e-mail application instead of the e-mail address.

Subject

Enter the subject line for the invitation e-mail here. You can use **custom attributes** in the subject line.

Attachments

You can send attachments along with the invitation. The maximum size for an invitation can be set by the administrator. The default size is 250 kB. Click on the **Attach** button to select the attachments. Next to this button, you see the name of files attached separated by a semicolon. Deleting a name from this list will also remove the file from the attachment.

Special tags

In the message text you can use three special instructions: **<USER>**, **<URL>** and **<EMAIL>**. The first one will be replaced with the name of the recipient. The second one will be replaced with a unique URL for each recipient. When recipients click this link they will automatically go to the web address where the dialogue is presented to them. The value **<EMAIL>** will be replaced by the e-mail address of the respondent. You can manually type the **<USER>**, **<URL>** and **<EMAIL>** tags, or you can insert them by right clicking your mouse and select these tags.

Using custom attributes

If custom attributes have been defined, these can be inserted in the email (and even in the subject line). These tags are replaced with the particular value in the database for the respondent. If the respondent comes from a database where this custom attribute has not been defined, this value is left blank. You can insert custom attributes by right clicking your mouse. An overview of all the custom attributes appears from which you can select. The custom attribute tags will appear in blue on your screen.

New Project

General Dialogue Target groups **Invitation** Reminders Results

Email Invitation

☒ Invite respondents at activation

Name: Wendy Lynch

From: wendy.lynch@mycompany.com

Subject: Employee Satisfaction survey

Attach...

! Attention

Use <URL> in your E-mail message, which will be replaced with the correct URL for the invited respondent. You can use <USER> to address the recipient personally or use <EMAIL> to insert the recipient's E-mail address.

Rule B I U Arial Unicode MS 8

Dear <User>,

We would like to invite you to give your opinion about the working conditions in our organization. Your employment as <function> warrants this research. Your ideas provide us with valuable input.

Please take a few minutes of your time to fill out the following survey:

<Url>

Thank you,
Wendy Lynch
HR department

Cancel Previous **Next** Close

Figure 23: Creating a new project step 4: Making an invitation text

Special markup

If a template for the invitation e-mail was created, you can use special markup in your e-mail. You can choose your fonts, font styles and font sizes. A toolbar with the markup tools will be shown if an e-mail template is available.

Customizing the invitation with rules

Click on the **Rules** button to define rules in your invitation. These rules are used to vary certain pieces of text, based on the value of custom attributes.

Insert/Modify Email Rules

Insert Condition Delete Condition

IF

gender = male

B **I** **U** Arial Unicode MS 8

THEN

Dear Sir,

ELSE ☒ Use

Dear Madam,

Cancel Ok

Figure 24: E-mail rules

Creating rules for an invitation works similar to creating a target group rule. A rule consists of a condition and one or two pieces of text. You can choose to put one piece of text in the e-mail if the condition is satisfied and another piece of text if it is not. For instance, you can choose to write 'Dear Sir,' in the invitation if the condition 'gender=male' is met and 'Dear Madam,' if it is not.

You can create the condition below the word **IF**. First, you choose a custom attribute. Then you define the comparison (for instance: equals, larger than or smaller than). After the comparison, you can input what the custom attribute has to be compared to.

After the word **THEN**, you write the text that has to be displayed if the comparison succeeds. Optionally, you can write the text that has to be displayed if the comparison fails after the word **ELSE**.

5.2.5 Reminder messages

In this step you can define and schedule reminder messages to your target groups. These messages will be sent only to persons who have been invited to participate in a survey but didn't yet participate. When sending out the reminders, the system checks who has participated.

All respondents in a target group must be invited

The reminder messages will only be sent to target groups where everybody has been invited. Reminders will not be sent when a sample size has been set. This is because the system itself will send out messages to reach the desired sample size. You can only access this tab when one of the selected target groups has been invited completely. Inviting everybody in a target group is done by checking the **All** checkbox, when you specify target groups for a project.

New Project

General | Dialogue | Target groups | Invitation | **Reminders** | Results

Buttons: Add ... | Edit ... | Delete

Reminders	Status	Remind After	Reminder Nature	Mail Sent
First reminder	Scheduled	1 Week(s)	Repetitive	0

! Attention

Use <URL> in your E-mail message, which will be replaced with the correct URL for the invited respondent. You can use <USER> to address the recipient personally or use <EMAIL> to insert the recipient's E-mail address.

From : wendy.lynch@mycompany.com
Subject : Reminder Employee satisfaction survey

Dear <User>,

We would like to ask you to fill out the customer satisfaction survey for which you were invited last week. Filling of the survey will only take a few minutes of your time.

<Url>

Thank you,
Wendy Lynch,
HR department

Buttons: Cancel | Previous | Next | OK

Figure 25: The overview of scheduled reminders.

A reminder message can be defined when defining a project, or added later when the project is already active. Multiple reminder messages can be defined.

To define a new reminder, click the button **Add**. A window appears where you can define your message. Just like the original email invitation you must enter an email address, a subject and a message with at least the <URL> tag.

Reminder nature

Besides this you need to schedule when the message will be sent. You can define the number of days, weeks or months after which the reminder should be sent (relative to the date when the original invitation was sent out). The remind nature is default set to **Once**. If the project is a continuous project, the reminder nature can be set to **Repetitive**. This means that the reminders will be sent with an interval that is specified by the value that is filled out in the 'Remind After' field.

Add Reminder

Reminder Name: First reminder

Status: Scheduled

Remind After: 1 Week(s) (Relative to the interval start date)

Reminder Nature: Repetitive

Name: Wendy Lynch

From: wendy.lynch@mycompany.com

Subject: Reminder Employee satisfaction survey

Attach...

Rule B I U Arial Unicode MS 8

Dear <User>,
We would like to ask you to fill out the customer satisfaction survey for which you were invited last week. Filling out the survey will only take a few minutes of your time.
<Url>
Thank you,

Cancel OK

Figure 26: Reminder message.

Reminder status

When a reminder message is still waiting to be sent, the status is **Scheduled**. You can delete or inactivate scheduled messages. You delete a message by selecting it in the reminder message overview and clicking the button **Delete**. You can inactivate a reminder message by selecting it in the overview and clicking the button **Edit**. The message will appear in a separate window. Now you can inactivate the message by changing the status to **Inactive** and clicking OK. An inactivated message will not be sent. At any time the inactive status can be changed to scheduled. Also inactive messages can be deleted.

When the system is sending out reminder email messages, the status will be **In progress**. After the messages have been sent, the status changes to **Completed**. If it is a repetitive reminder message, the completed status will be changed to **Scheduled** at the beginning of a new interval.

Remind now

If you want to send out a new reminder immediately, then choose the status **Remind Now** when creating a reminder. Each reminder that has the status **Scheduled** can also be sent out immediately. To send a reminder immediately, select it, and click the **edit** button. Set the status of the reminder to **Remind Now**. If the original invitations are over, the reminder will be sent immediately. The status of the reminder will automatically be set to **In progress**, once the sending has started.

5.2.6 Results

After you have completed step 5, the project is complete. If you have selected the status 'starts at', defined a start date and set the invitations, the project will automatically be executed.

Get results any time

Any time during and after the project you can retrieve the results in the fifth step of the project wizard. Simply select a project, click the **Edit** button and go the fifth step **Results**. Here you can see the number of responses. When you click the **Get** button the system will download the results (this may take a while, especially when there are many respondents) and ask you in which file format you want the results and where you want to save them. After clicking **OK**, the system transfers a copy of the results to your system in the chosen file format. For a continuous project you can select the intervals for which you want to download the results (see figure below).

Get	Interval	Start Date	End Date	Mail Sent	Count
<input type="checkbox"/>	Week 34 2004	19-8-2004	26-8-2004	0	0
<input type="checkbox"/>	Week 35 2004	26-8-2004	2-9-2004	0	0
<input checked="" type="checkbox"/>	Week 33 2004	12-8-2004	19-8-2004	24	0

Check All Uncheck All Total: 0

Get...

Cancel Previous Next OK

Figure 27: Selecting and downloading results for a continuous research project

The three available data formats for the results are:

- Microsoft Excel
- SAV /SPSS file; specific file format for statistical software.
- CSV (Comma separated value)

The SAV data file format was developed by SPSS. This file format contains data as well as meta information that describes the meaning of the data. If you have analysis software from SPSS or another package that reads the SAV format you can download this file format and analyze the data immediately.

The CSV file needs to be imported for use in Excel. You cannot use this file in Excel directly. In Excel, on the 'Data' menu, choose 'Get External Data' and then choose 'Import Text File ...' to import the CSV file.

The data files (SPSS and CSV file) generated by the Metatude system not only contain the survey data, but also the attributes of the person who completed the survey, as well as the name of the target group. These characteristics are useful in analyzing the data.

The Excel file not only holds the results in numbers, but also contains charts of most of the questions. For multiple choice questions these are pie charts. For multiple response, scale, matrix and priority questions these are horizontal bar charts. You can easily change the chart type by selecting a chart, click with the right mouse button and select 'Chart type'. You can select from a large variety of charts in Excel.

The generated Excel file has different worksheets:

- 1) Charts
- 2) Frequencies
- 3) Data
- 4) Intervals (only for continuous projects)

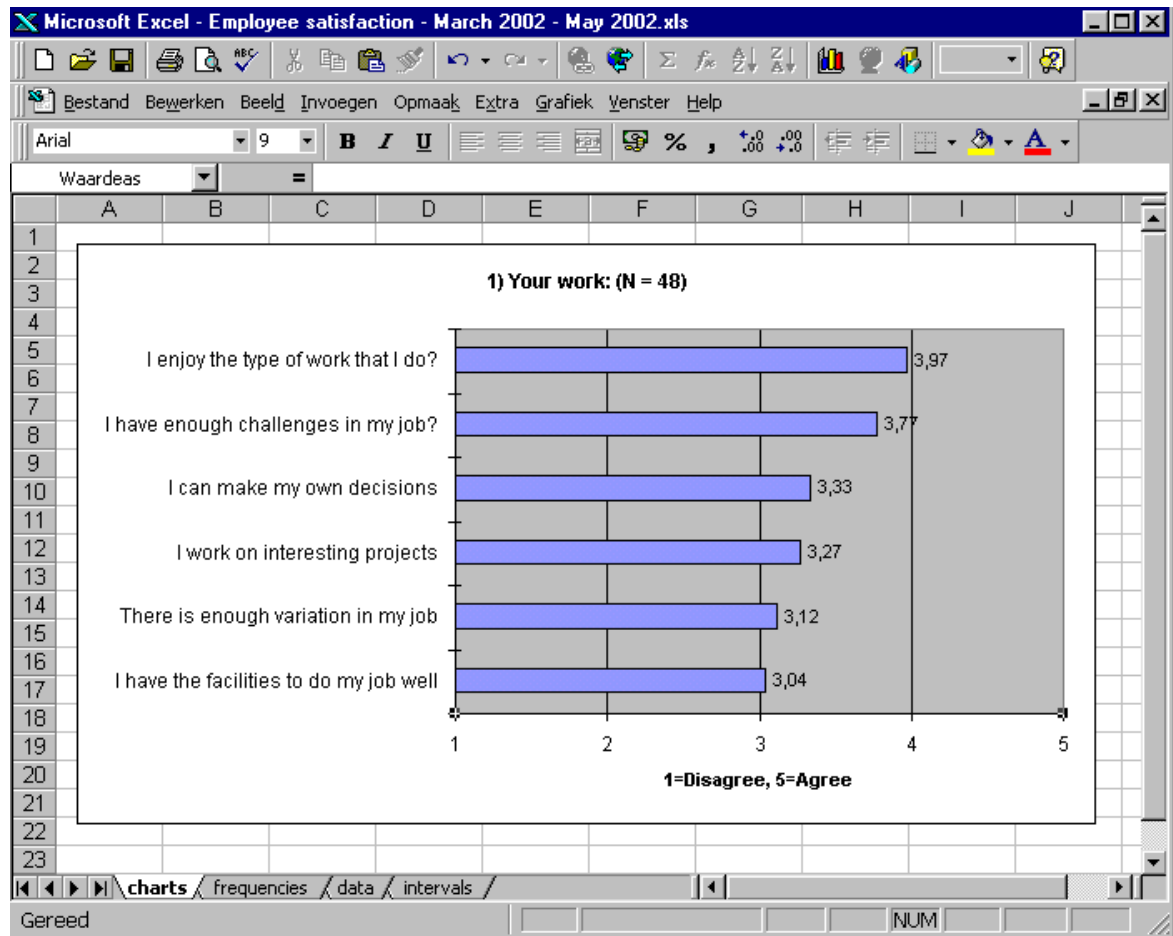


Figure 28: Example of automatically generated Microsoft Excel file including charts

5.3 Editing an existing project

You can edit project information by selecting the project and clicking the **Edit** button in the operations bar. The same wizard is presented as when you defined the project. Now it allows you to make the necessary changes. After clicking the **OK** button, the changes are saved. At any time you can click the **Cancel** button to cancel the operation. In this case, the changes are not saved. Not all projects can be edited, only those that still have to start or those that are inactive.

You can remove a project from the overview by selecting one and clicking the **Delete** button in the operations bar. You can only remove projects that still have to start or projects that have been completed. The table below presents an overview of the possible operations for each status of a project.

Possible Operations:

Status Project	Creating	Editing	Deleting
Active	X		
Inactive	X	X	X
Starts at	X	X	X
Completed			X

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