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Project Management Functional Overview

Chapter Objectives

Upon completion of this chapter, you will be able to perform the following:

- ✓ Understand the project management sections or task groups
- ✓ Understand The Invoke Platform Terminology

Overview

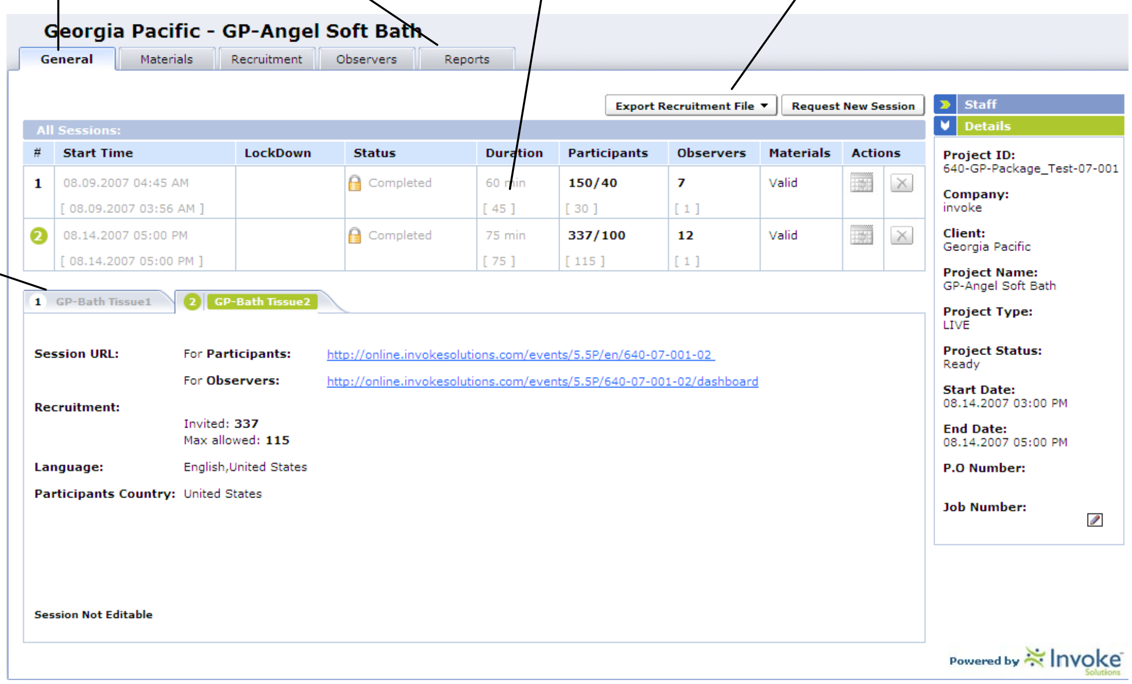
The Project Management sections described in this chapter are broken into five distinct groups. Each functional section has tasks that have been grouped to that specific section although they are not necessarily completed in the order of presentation or by the same person.

In order to work effectively with the Invoke Platform you will also need to understand Invoke Platform and industry specific terminology.

Understanding Project Management Workflow

Project Management tasks can be broken into five separate and distinct sections:

- General
- Materials
- Recruitment
- Observers
- Reports

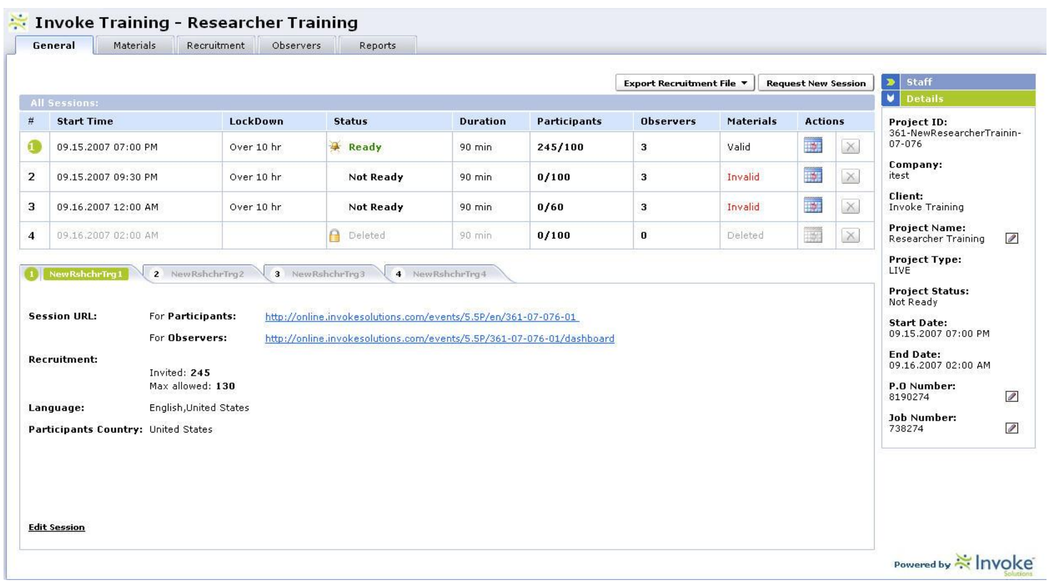


Tasks in functional groups

Each tab or functional group contains a specific set of tasks. Some tasks are performed at the project level while others are session specific. Each section to follow will include a map or screen capture of each tab or group and a table describing the content and functionality. Chapter 3 will describe specific steps to complete each task.

The General tab

The General tab contains summary project information as well as basic administrative tasks. These include staff assignments, requests for additional sessions and the project level Invoke Session File (ISF) export function.

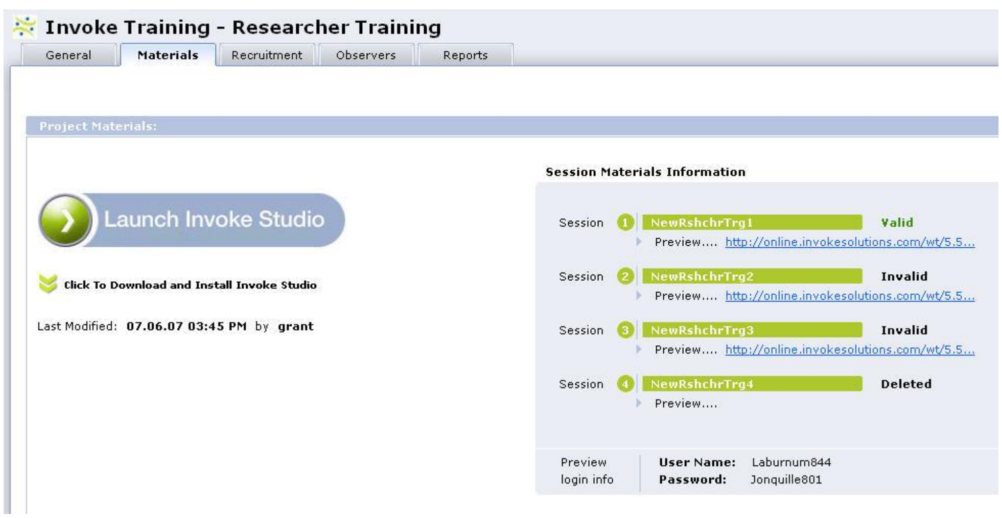


Function / Area	Description
All Sessions	The All Sessions section contains logistical data for all sessions in a project: Start time; Lock Down; Session Status; Session Duration, Participants invited and Participants required; number of Observers and status of Materials. Once a session has ended the actual information will be presented along side with the original planned information.
Export Recruitment File	The Export Recruitment File button creates the Invoke Session File, or ISF at a project level. This four panel Excel Workbook contains the participant load template and session information. When participant data is loaded to the ISF, the ISF becomes the Participant Session File, or PSF at a *session* level that will be loaded to each session.

Request New Session	The Request New Session button launches the Project Request form, with existing session data so that any project member can request an additional session to the project.
Staff	Staff members must be assigned to a project to view or edit content.
Details Section	The Details section contains summary level information: Project ID; Channel; Project Name; Project Type; Project Status; Start Date; End Date, P.O. number, and the Job Number.
Session Section	Each Session Section contains the Participant URL that is used to generate participant invitations as well as the Observer link. This section also contains a summary of recruitment, session language, participant location (country) and the edit function which allows to edit session attributes. Session status is displayed as well throughout the different session stages.

The Materials tab

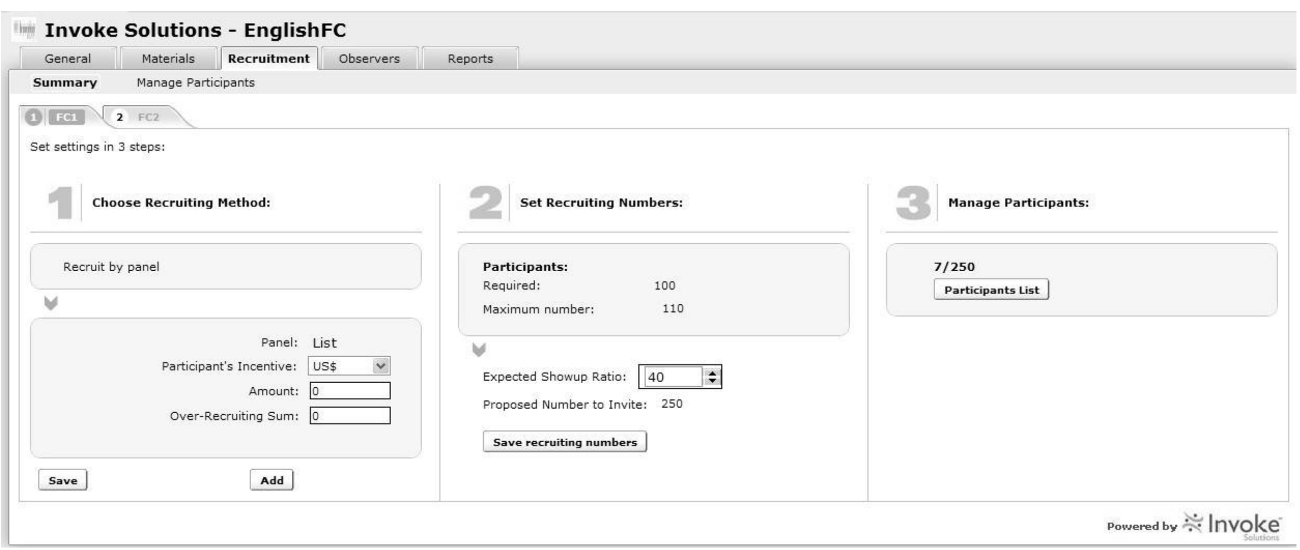
The Materials tab contains the download and launch to iStudio, where session materials are created and edited, as well as the walkthrough links for each session.



Function / Area	Description
Download and Install Invoke Studio	When an upgrade is available for the Invoke Studio you will be prompted to upgrade as you launch your current version.
Session Materials Information	Walkthrough links are available for each session. In this illustration the material is valid and accessible. When materials are locked for editing and processing the walkthrough link will not be valid. User ID and Password for viewing the walkthrough are generated by the system at the project level and available on the General panel within the details list.
Preview login info	Hold the user name and password for the walkthrough (Those credentials should be sent to clients attached to the walkthrough link)
Launch Invoke Studio	Invoke Studio is launched from the materials panel. Invoke Studio is an integrated application used to load, develop and edit discussion guides and media.

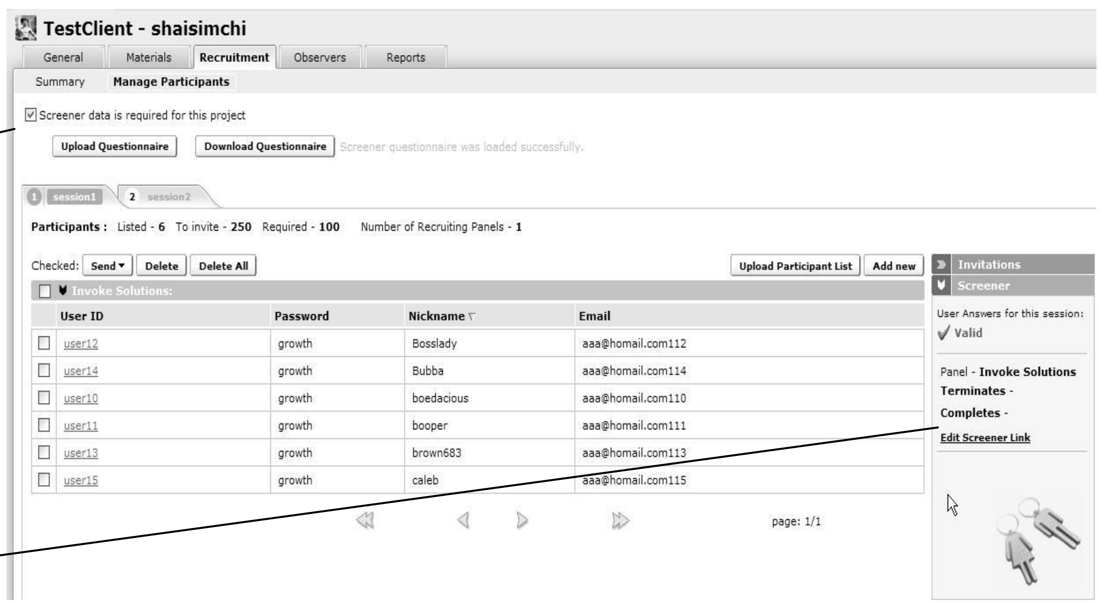
The Recruitment tab

The Recruitment tab is the most complex tab in the project management group. You will notice that it contains a second and third level of sub-menus. The Summary portion of the recruitment tab contains the basic recruiting information required by the system prior to exporting the Invoke Session File (ISF).



Function / Area	Description
Choose Recruiting Method	From the Summary tab, each vendor that will provide panel is added along with incentive and over-recruiting information.
Set Recruiting Numbers	From the Summary tab, the maximum number of participants and expected show rates are established.
Manage Participants	From the Summary tab, the Manage Participants button will take you directly to the Participants list sub-menu. Alternatively you can select the Participants list directly.

The second sub-menu, Manage participants, is where the Participant Session Files (PSF) are uploaded by session and where Participant invitations are managed. On the project level it allows to upload the screener questionnaire to enable this feature for the project.



Manage screener data from this tab

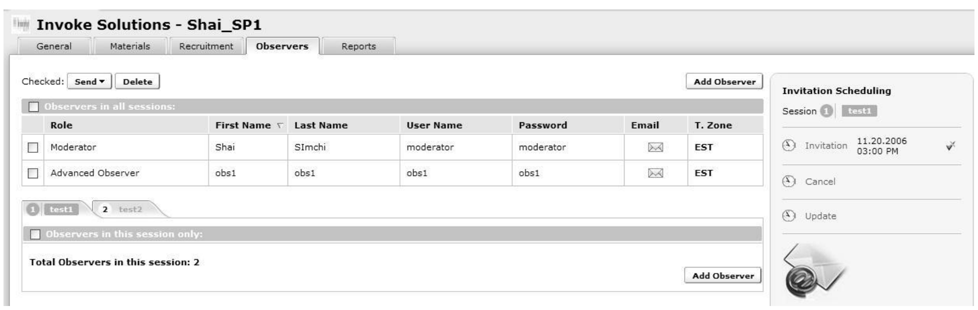
Manage user answers and screener links

Function / Area	Description
Upload questionairre	From the Manage Participants tab, the Upload Questionnaire button prompts the user to browse for, select and upload the questionnaire for the project.
Download questionairre	From the Manage Participants tab, the Download Questionnaire button allows the download in an Excel format of the questionnaire that was uploaded.
Upload Participant List	From the Manage Participants tab, the Upload Participants List button prompts the user to browse for, select and upload the Participant Session File, or PSF, by session.

Add New	From the Manage Participants tab, the Add New button will allow you to add participants manually, one at a time.
Participant List	From the Manage Participants tab, the Participant list can be sorted and viewed ten participants at a time sorted by ID or by Nickname.
Email	At the Manage Participants tab, invitations and reminders are scheduled automatically by the system. You can edit the time and date those invitations and reminders are sent. If your panel company is sending invitations, simply leave the email information out of your upload and the system will not send invitations or reminders.
Screener	At the Manage Participants tab, User answers status for the session can be obtained along with the screener “Terminates” and “Completes” links.

The Observers tab

The Observer tab contains all Observer information stored in the system. Observers can be manually entered one at a time. They can also be loaded through an import file at the project level or at individual session levels. Observer invitations are managed by the system as a panel company will almost never manage observers.

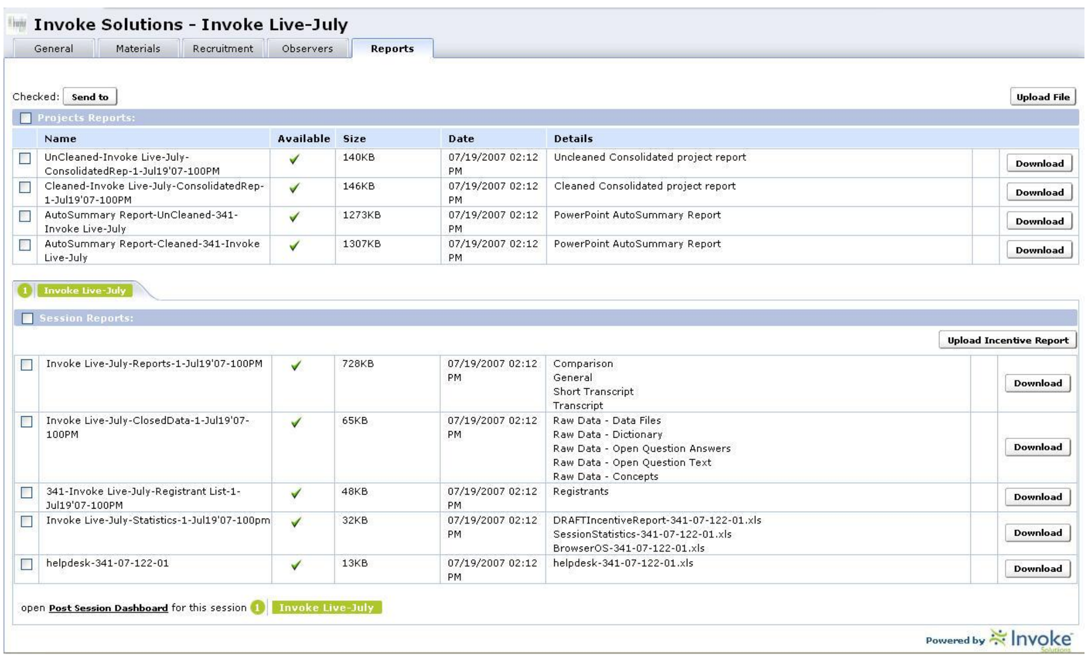


Function / Area	Description
Add Observer	The Add Observer button allows you to add Observers one at a time or export a list template into an Excel file and then upload the completed template. Observers are stored at the project level for all sessions or they can be stored at individual session levels. There are four different Observer types and it is imperative that types be assigned accurately.
Moderator	There can only be one Moderator ID. This Observer type is reserved for the technical moderator who will be releasing, adding, and editing questions and media during the sessions. Assigning the Moderator Name controls the name that the moderator will have during the session while interacting with respondents.

Advanced Observer	The Advanced Observer IDs are used by the Research Moderator or Group Leader and a few carefully selected assistants. This type of ID allows the chat function and the ability to manage participants during the in-session part of a project
Observer	This is the standard default. A Standard Observer can do everything except chat and manage participants.
Restricted Observer	A Restricted Observer can participate in a session as an active observer, without chat or managing participants, but will have no rights or access to reports.

The Reports tab

The Reports tab contains all system generated reports available at a session and project level. You are also permitted to upload adjusted reports. The reports that generate after a session or project are determined by your contract.



Report	Description
Uncleaned Consolidated Report	The Consolidated Report is an Excel workbook containing consolidated data from all sessions in a project including verbatims. Unclean data is defined as data from a participant who did not belong or an incomplete data set from a participant who did not complete enough of the session. This is a project level report that updates after each session.
Cleaned Consolidated Report	The cleaned version of the Consolidated Report has uncleaned data removed through the use of profile cleaning questions or cleaning filters run after a session, or a combination of both. This is a project level report that updates after each session.
Invoke PowerPoint AutoSummary Uncleaned	This PowerPoint presentation is system generated with data from each question deployed during the live session. This is a project level report that updates after each session.
Invoke PowerPoint AutoSummary Cleaned	The cleaned version of the Invoke Instant Insight report has had uncleaned data removed by cleaning questions identified in the profile section of the discussion guide, the cleaning filters run after a session, or a combination of both. This is a project level report that updates after each session.
Draft Incentive Report	The Draft Incentive report is a system generated report that provides participant statistics such as number of completes over-recruits and the percentage of questions completed by each participant. This report lists participants by unique user ID only, which is generally the information required by the panel company in order to process incentive payments. This is a session level report that needs to be accessed for each session separately. This report is part of the statistics report.
Incentive Report	The Incentive report is uploaded by you after you have made necessary adjustments to the Draft incentive report.
Transcript Reports	The Transcript reports are duplicates of the long and short version reports that can be exported from the Post Session Dashboard (PSD) immediately following a session. The short report contains all the closed end data at a summary level per question and the long report adds the verbatims. This group of reports also provides summary level session statistic data and a view of the session comparison view.
Raw Data Files	The Raw Data file collection contains the raw data, in an ASCII format delimited text file, from the closed and open end questions as well as the data dictionary and comparison data.
Registrant List	The Registrant List is a PDF report listing all participants invited to the session, whether they participated and the time of logout if they did participate.
Statistics	The Statistics report displays participant level technical data and also includes the draft incentive report.

Understanding Invoke Platform Terminology

The Invoke Platform provides instant access to all of the tools required to create and launch a project, from start to finish. Below is a list of Invoke and industry terminology grouped by functional overview.

General Overview	
Calendar View	The Calendar view is the default view upon login. This is currently a weekly view. Daily and Monthly views are also available.
List View	The List view shows reservations and scheduled projects in a list.
Create New	The Create New function allows you to create a new project request or a new client. You can also edit client details from the Create new dialog box.
Overview	The Overview button is used to navigate back to the default calendar view from anywhere in the portal.
Start Time	Start Time is the time each session is designated to begin.
Project Name	The Project Name is the top level identifying name for a project that contains one or more sessions.
Session Name	The Session Name is the individual name of each session belonging to a single project.
Status	Status indicates status of a project. During the project request phase, a pending project may be a request, a valid reservation or a confirmed project. Once a reservation has become a confirmed project the project status is Ready or Not Ready. The Status 'Ready' indicates that all materials and logistical data have been completed and the session is ready to run.
Project Panel	The Project Panel is a drop down menu that allows you to select your projects, current or past, from a list.
Lock Down	Lock Down occurs 60 minutes prior to session launch. This process occurs automatically. No other changes can be made to a session once lock down has occurred.
Duration	Duration is the session length.
Participant URL	The Participant URL is the live link required to access a live session by a participant. This link is used by panel companies in invitations to participants. The Participant link always has the participant User ID appended to the URL.
Observer URL	The Observer URL is the live link required to access a live session by an observer. The portal generates observer invitations using this link.
ISF	The ISF is the Invoke Session File. This file is downloaded from the portal and is the template used to collect participant data required by the portal for participant login. This file becomes the PSF when it contains participant data.

Materials Overview	
Invoke Studio (iStudio)	iStudio is the application used to program a discussion guide and media. The iStudio application is launched from the Materials tab in the body of a project.
Materials	Materials include the discussion guide and any media that will be used to collect responses from participants during a live session.
Discussion Guide	The Discussion Guide, also referred to as a 'dguide' contains all of the questions, question types, and possible answer choices for a session in the order that they will be deployed.
Media	Media, also referred to as 'stimuli' are the pictures, videos, websites, html links, or text that participants view and respond to during a live session
Question Types	There are six different question types available in an iStudio discussion guide. They are Open (also referred to as 'verbatim'), Scaled, Forced Choice, Multiple Choice, Ranking and Grid.
Participant and Obsever Overview	
Participants	Participants respond to questions and media or stimuli during a live session. Participants are either recruited from a panel vendor or from a list.
Observers	Observers actively participate in a live session by viewing incoming participant responses and analyzing data and results.
PSF	The PSF is the Participant Session File. This file contains all participant login credentials and is uploaded to the portal prior to session lock down. This data is required to create participant logins.
Panel Recruit	A Panel Recruit provides a group of participants based on a specific set of recruiting criteria. Members of a panel group expect to be contacted and recruited to participate in live sessions. Therefore the show rate can be expected to be much higher than a list recruit.
List Recruit	A List Recruit provides a group of participants based on a set of recruiting criteria. There are no 'members' in a list recruit in that these participants do not expect to be contacted and are therefore significantly less likely to reply to a request to join a session. Often the participant list data such as email addresses and phone numbers are inaccurate making it difficult to contact possible participants on the list. The show rate can be expected to be significantly lower than a panel recruit.
Screener	A screener is a set of questions answered by prospective participants to determine whether or not they are an appropriate fit for a specific project. For example, if I want to talk to mothers under 30 with 2 or more school age children and a combined household income above $50,000 I would create a screener designed to identify participants fitting that criteria.

Required Participants	Required Participants are the number of 'complete responses' desired from a session.
Maximum Participants	Maximum Participants are the actual number of participants permitted to enter a live session. Standard procedure involves allowing an additional 10% over the number of required participant completes into a live session to ensure that the target number complete. Drop off occurs for multiple reasons stemming primarily from minor technical incompatibilities and participant distraction.
Show up Ratio	The Show up Ratio is the percentage of participants from an invited group that can reasonably be expected to show up to a session on time. Currently the average show up ratio, or show rate, for a General Population panel recruit is 40%. This means that if I wanted 150 participants to arrive on time and complete the session I would invite 375.
Invitation	The Invitation is generated by the panel company or the portal, depending on your relationship with your panel vendor or how you choose to manage a list recruit, and emailed to all participants who have passed the screener criteria. The invitation contains the date, time, session length, URL and password to attend a live session. The invitation is generally sent 24 hours before the live session start time.
Reminder	A Reminder is often sent the morning of and one hour before a live session.
Reports Overview	
Reports	Reports are generated by the portal after a session is complete. There are session level reports and consolidated reports. Consolidated reports become available after each session but are updated as project sessions complete.
PowerPoint AutoSummary Report	The PowerPoint AutoSummary Report is a consolidated PowerPoint presentation containing all of the questions and answers at a summary level.
Consolidated Report	The Consolidated Report is an Excel file containing concept summaries and 'verbatims' (open end question responses) by session.
Raw Data Files	Raw data files contain the closed and open end question responses in an ASCII format. These files can be imported into other data analytics tools such as SPSS.
Statistic Reports	Session Statistic Reports contain statistical data relating to participant response rates.
Incentive Reports	Incentive Reports are generated as part of the Statistic Report group and are used by either the panel company or another fulfillment source to determine which participants have earned an incentive.
Incentive	An Incentive is the reward provided by either the panel company or the client to the participant for completing a session.

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