1
The Invoke Platform

Chapter Objectives

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

- ✓ Understand the Invoke Platform and the accompanying suite of tools
- ✓ Understand the Invoke Platform and industry specific terminology
- ✓ Navigate MyInvoke
- ✓ Create a project request
- ✓ Create a new client
- ✓ Edit an existing client
- ✓ Locate and open a project

Overview

This chapter reviews the Invoke Platform features, components and terminology.

Exploring the Invoke Platform

The Invoke Platform is a turn-key solution that assists research professionals in developing and deploying live, real-time research sessions, managing participants and data and retrieving a robust series of reports. This platform has three interlocking components used in conjunction that empower the researcher and the client to achieve instant actionable results.

Components

The Invoke Platform works with Microsoft Windows © and browser client software together with administration tools, custom design tools, and a mid-tier application server.

The suite includes the following:

MyInvoke Portal	An end-user administrative tool used to manage sessions and staff scheduling, participant and observer information, session materials and reports.
Invoke Studio (iStudio)	Provides the interface to compose and edit discussion guides and media. Also contains a library of stored templates, individual questions and media.
Invoke Live	The in-session experience that allows individual participants, observers and moderators to interact in a live, real-time feedback session that enables instant insights and confident decision making.

Understanding Invoke Platform Terminology

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

General Overview	
Calendar View	The Calendar view is the default view upon login. This is currently a weekly view.
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 and the Post Session Dashboard by an observer. The portal generates observer invitations using this link.
ISF	The ISF is the Invoke Session File. This file is exported 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 is a standalone application that is launched from the Materials tab in the body of a project.
Materials	Materials include the discussion guide (questionnaire) 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 questions 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, Grid and Ranking.
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, chatting with participants, 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 project level reports. Consolidated reports become available after each session but are updated as project sessions complete.
PowerPoint AutoSummary	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 question responses in a raw text format.
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. The incentive can be monetary, a point system, or other goods or services of value. The most common incentives are US dollars and points.

MyInvoke Portal Overview

MyInvoke, often referred to as the Invoke Portal, is used to manage the following:

- Schedule session requests
- Manage staff resources
- Manage participants and observers
- Retrieve and upload reports
- Create and edit session materials through iStudio

Accessing the Invoke Portal:

1) Launch **Internet Explorer.**

2) Open the location - http://channel.myinvoke.com/portal

The actual address of your MyInvoke Portal will have your company name in place of the word 'channel' in the address bar.

The login page displays:

Note: *The actual address of your MyInvoke Portal will have your company name in place of the word 'channel' in the address above.*

3) Enter your username and password and select **Login**.
The Overview page with Calendar view displays.

Navigating the MyInvoke Portal

The MyInvoke Portal is divided into three primary functions which each contain multiple sub-categories. The following is a high level summary of each.

- Scheduling
  - Managing clients
  - Scheduling session requests
- Project Management
  - Managing participants and observers
  - Managing reports
  - Managing staff assignments
- Invoke Studio

Portal support

At any stage during your work in the MyInvoke portal you can click on the  button on the top right hand side of the screen. You will directed to the Invoke Solutions website to the portal support page that includes an FAQ files with some of the common questions Invoke Solutions has encountered regarding the use of the portal as well as the Portal and iStudio manuals.

Scheduling requests

The Calendar view is the default view at login. This view can be considered the home page. The alternative is the List view which is used more often by project management when searching for a specific project. The Calendar view is used for both administrative and scheduling functions as well as project management. The Calendar displays daily, weekly and monthly views.

Overview button returns viewer to Calendar view

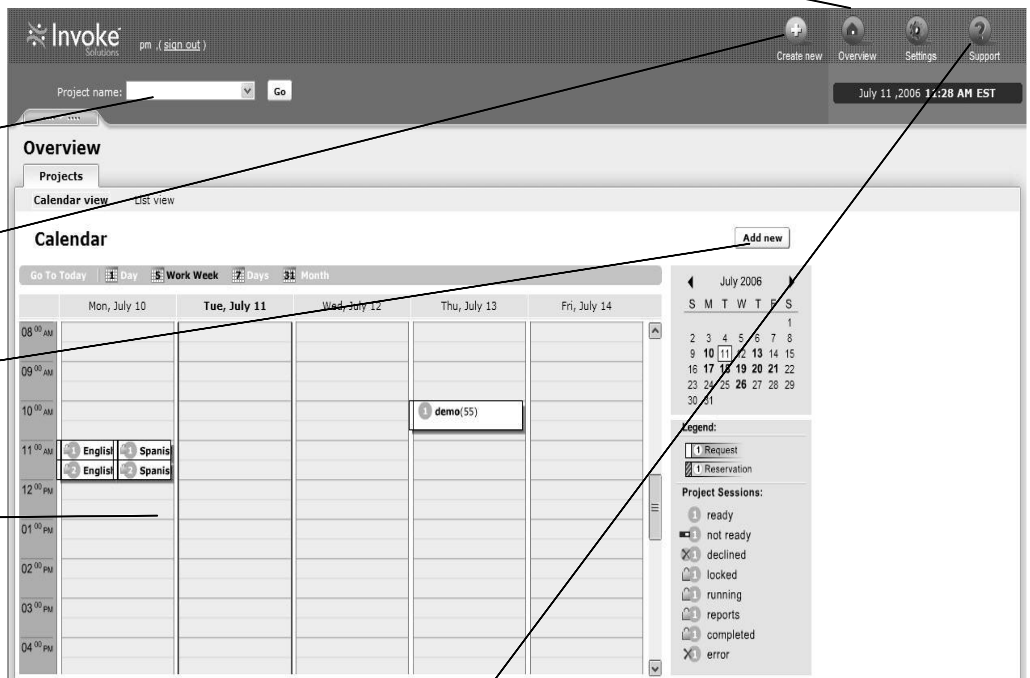
Project name search field

Create new reservation or client

Add new reservation request button

Weekly calendar view of projects and reservations

The Support button opens a browser window to the portal's FAQ page



Schedule Request Detail

The detail required to schedule a project request requires a working knowledge of Invoke and industry specific terminology. The following table defines all of the required fields in a project request form. The project request form is accessed by selecting the Add new button from the Calendar view or by selecting the Create new button from the Overview page. Each field is described below in the order that it is required.

Required Field	Description
Channel	If you are a channel partner, this is your company name and will default to the required field. If you manage more than one channel partner you will need to select the appropriate channel from the drop down menu.
End Client	The End Client is the client for whom the research is being conducted. If this client does not exist in the channel you are working in, you will need to add the client from the Create new button on the Overview page.
Project Name	While the Invoke Portal will generate a client specific project ID you will need to name your project at a top level. Session names will be assigned as well.
Number of Sessions	Select the number of sessions in your project from the drop down menu. The Invoke Platform currently supports five contiguous sessions per project.
Invoke Version	The Invoke Platform may support up to two versions of a release. Please select the most current version unless you have known conditions that would require you to work in a previous release.
Project Type	Currently the only project type supported by the Invoke Platform is 'live'. In the future there may be alternative options such as 'practice'.
Project Language	Select the language in which you will present your project. Language is selected at a project level as the language choice drives the invitation, messaging and in-session language. The Invoke Platform currently supports English and Spanish.
P.O. Number	An optional field that allows inclusion of a Purchase Order number.
Job Number	An optional field that allows inclusion of a Job number.
Session 1, 2, 3…5	Name each session individually or use the Apply to All radio button to automatically number sessions.
Start Time	Using the Calendar button, indicate the date of your sessions.
Hour	Using the Hour drop down menu, select the start times for your sessions.
Duration	Enter the duration of the session in 15 minute increments.
Number of Participants	Enter the number of participants you require to complete each session.

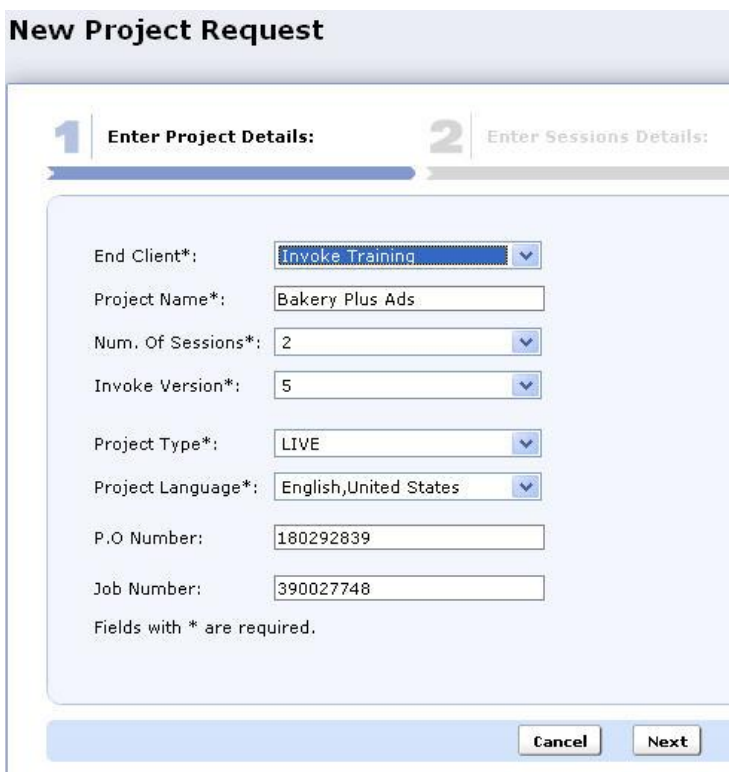
Recruitment Method	Select your recruitment method, panel or list.

Participants in Country	Indicate the country from which the majority of your participants will connect to the session. The default is United States and should be used unless a significant portion of your participants come from another location.
Time Zone	Indicate the time zone you wish to use. This selection should reflect the time zone you operate in unless you are specifically over-riding the time zone.
Apply to All	This radio button is available for the first session in the project and is used to copy the first session details to the remaining sessions. This will automatically add a numeric to the end of each session name and will generate a calendar date that adds one day to each session. This option also duplicates start times. If you use this option, please make sure that you reset your calendar dates and session start times.

Scheduling a project request:

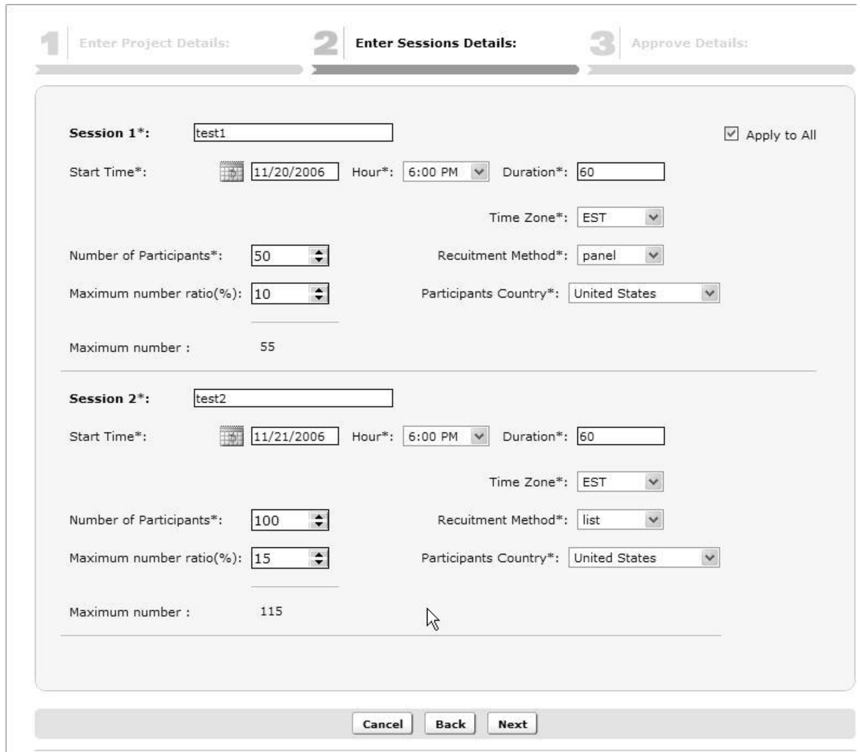
1) From the Calendar view select the **Add new** button.

   The New Project Request form displays at the Enter Project Details panel.



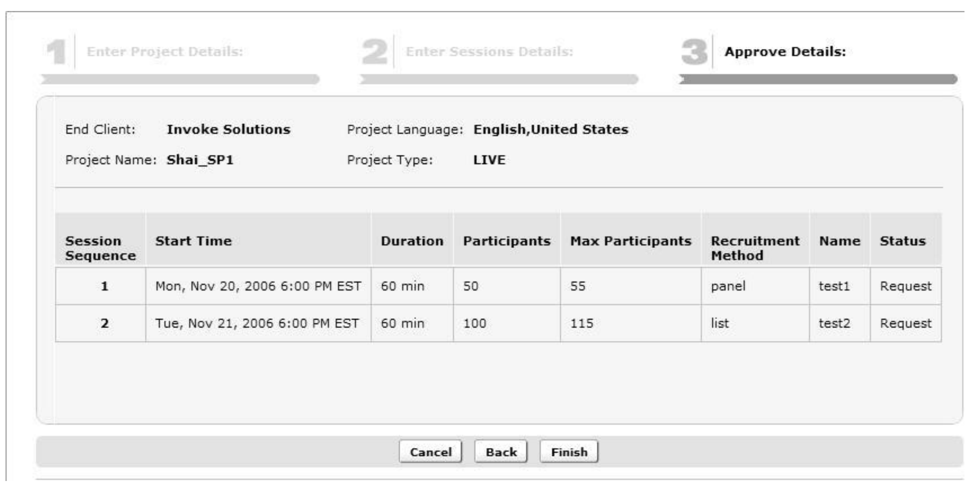
2) Enter project detail and select **Next**.

The Enter Session Details panel displays.



3) Enter session detail making sure that dates and times are accurate if you use the Apply to All function. Select **Next**.

The Approve Details panel displays.



4) Validate your data and select **Finish**.

Your project request has been submitted.

Create a new client:

Creating a new client is a single step process that can be accessed from anywhere in the Invoke Portal.

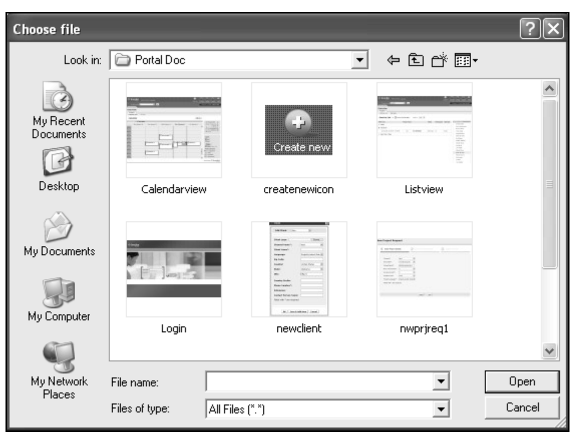
1) Select the 

Create new button from the upper right corner of your screen.

The Client dialog box displays.

2) Select the **Browse** button to upload the new client logo.

Navigate through your Windows Choose file dialog box to locate and select a bitmap (*.bmp) or jpg. Bitmaps and jpgs are currently the only supported file types.



3) Enter the remaining required fields and select **OK** to add the new client.

Edit an existing client:

Clients are edited in the Create new dialog box which can be accessed from anywhere in the Invoke Portal.

1) Select the 

Create new button from the upper right corner of your screen.
The Client dialog box displays.

2) Select the drop down menu from the **Edit Client** field.
The current list of clients in your channel displays.

3) Select the **client** you wish to edit.
The existing client data populates.

4) Make changes or edits and select **OK** to update your client information.

Locate and open a project

Projects can be located and accessed from four separate areas in the Invoke Portal:

- Project name drop down list
- Overview Project Panel
- Calendar view
- List view

Locate a project from the drop down list

1) From anywhere in the Invoke Portal select the drop down menu at the **Project name** field. The Project name field is located at the upper left corner of your screen.
   A list of your current projects displays.

   ***Note**: Only projects display in the project list. Requests and reservations must be located through the calendar view.*

2) Locate your project and select **Go**.
   Your project displays at the default General tab.

Locate a project from the Overview project panel

1) From anywhere in the Invoke Portal click the top of the project panel to open the project panel.

Project Panel Closed

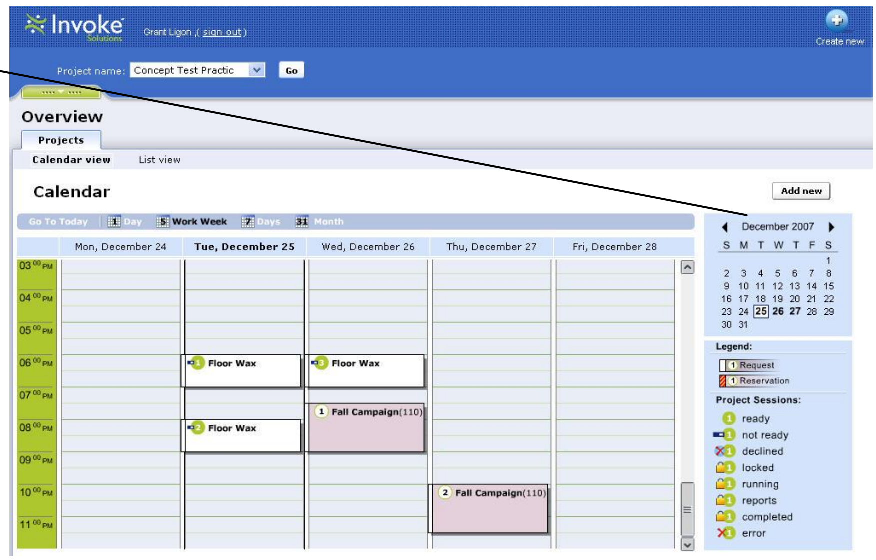
Project Panel Open

2) You can select the **Dock panel** option to dock the panel to the left side of your screen or you can locate your project through **My Projects** or **Past Projects** and then close the panel.

Locate a project from the Calendar view

1) Select the **Overview** button  from the upper right section of your screen.
   The default Calendar view displays.

Monthly calendar



2) Locate your project in the Calendar view. Use the **monthly calendar** function on the right to select the appropriate week or date.

3) Select any **session** from the project you wish to locate.
   A drop down edit menu displays.

Select **Open** to access your project

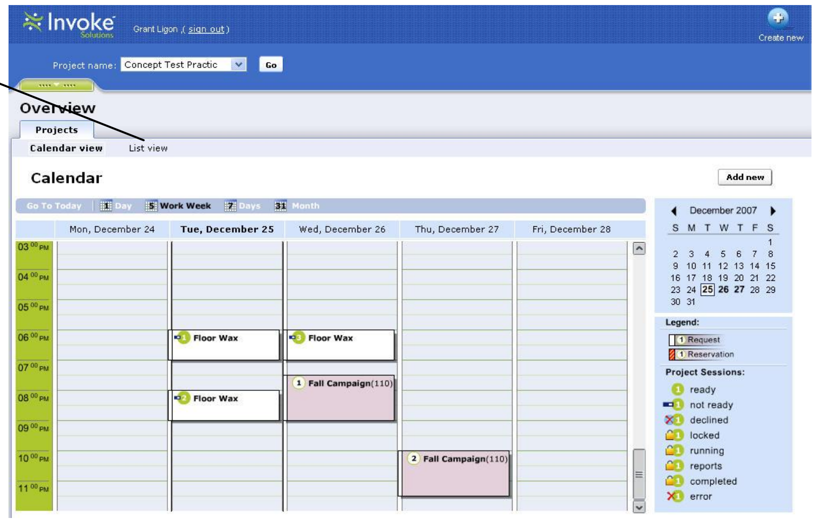
4) Select **Open** to access your project.
   Your project displays at the General tab.

Locate a project from the List view

1) Select the **Overview** button  from the upper right section of your screen.

The default Calendar view displays.

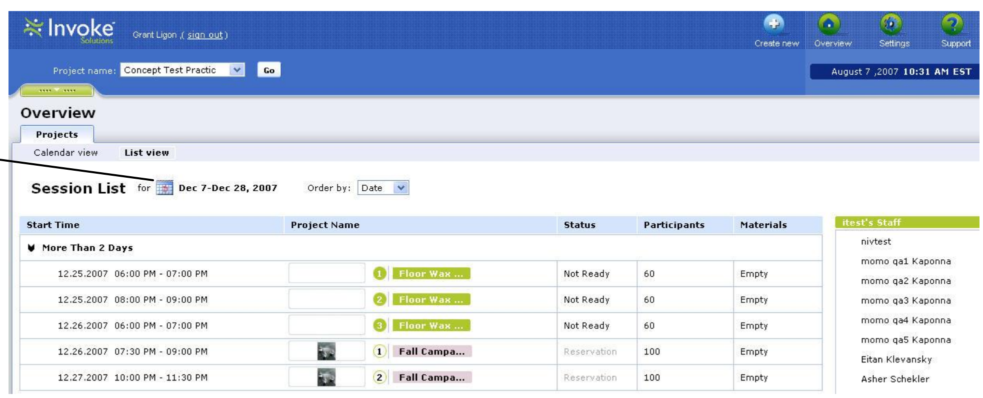
Select List view to change views

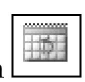


2) Select **List view**.

The List view displays.

Select the calendar button to change date range



3) Select the Calendar button  to change your date range.

4) Locate your project in the **Today**, **Tomorrow** or **More Than 2 Days** groups.

5) Click anywhere on your project to activate the **edit menu**.

Select **Open** to access your project.

Select **Open** to access your project

Note: *You will notice that the edit menu on the list contains the session name.*

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