Concept Systems INCORPORATED

The Concept System®

Global Max™

Software Guide

The Concept System®

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Introduction: The Concept Mapping Process

Welcome!

Ideas are everywhere – and when harnessed and put to use, the ideas of a stakeholder group represent a valuable strategic resource for your organization. The Concept System® gives you the power to understand how groups think, using a proven quantitative and qualitative methodology that captures the results of a group problem-solving process into a topography of thought – producing visual 3D maps of ideas and their relationships, combined with extensive reporting and charting capabilities that provide strategic visibility and decision support to your planning, evaluation and research efforts.

Today, The Concept System® combines the power of the widely used *concept mapping* methodology with a web-based interface (The Concept System® Global MAX™) that allows you to harness the ideas of groups in settings ranging from local on-site projects to large-scale, geographically distributed stakeholders across the globe. Combined with a proven analysis engine and reporting tool resident on your personal computer system, The Concept System® Global MAX™ interface allows true distributed management of a concept mapping project.

Certain technical and methodological pre-knowledge is helpful. The Concept System® Global MAX™ is web-based software, and you should have some familiarity with web-based applications and know how to use a web browser. You should also have a basic understanding of your PC and typical PC applications. All Concept Systems applications are based on group process techniques, and you will benefit from understanding these techniques (such as brainstorming and organizing ideas) and their value before you begin. Finally, some knowledge of descriptive statistics will help you set up your project and interpret the results.

This guide will show you how to put The Concept System® Global MAX™ to use in your own projects, beginning with a step-by-step overview of the concept mapping process in this section, followed by a detailed discussion of program features for each step of the process, and a step-by-step example to guide your initial project efforts. Combined with hands-on facilitator training from Concept Systems, Inc., this document represents your personal roadmap for unlocking the power of group thought.

An Overview of Concept Mapping[1]

Concept mapping is a process that helps a group describe its ideas on any topic of interest and represent these ideas visually in the form of a map. The process typically requires participants to brainstorm a large set of statements relevant to a defined topic of interest, known as a *focus prompt*, individually sort these statements into categories of similar ideas, rate each statement on one or more scales, and interpret the maps that result from the data analyses. The results of a concept mapping process can include outputs such as the following:

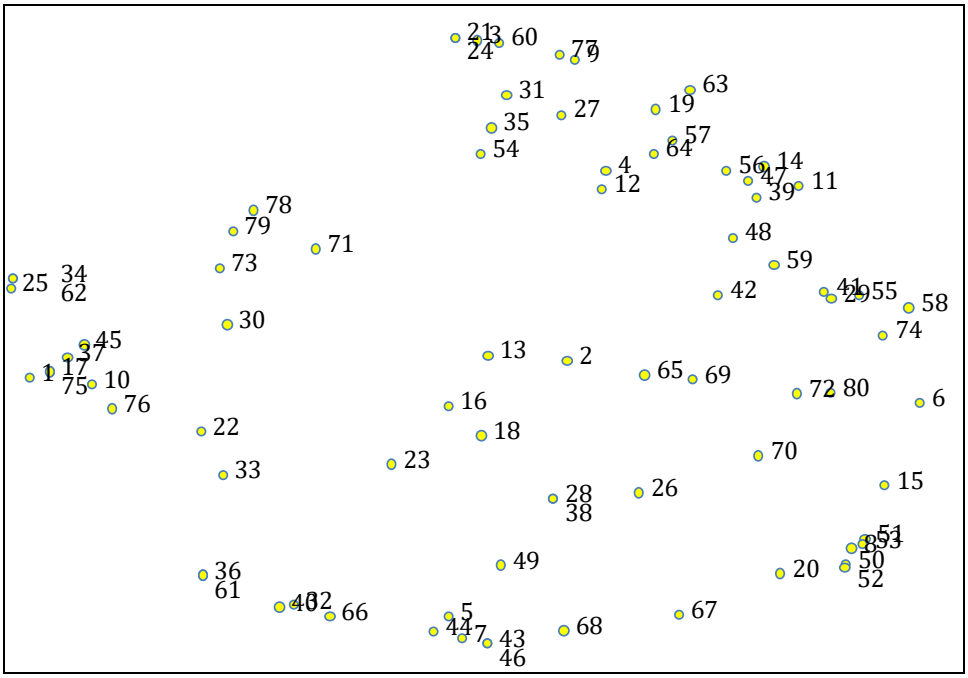


Figure 1: Point map.

[1] Concept Mapping for Planning and Evaluation, by Kane and Trochim (Sage Publication, 2007) is a complete description of the methodology.

A *point map,* shown in Figure 1, displays the relationship and proximity of ideas to one another. Each point on the map represents one idea. Those closer in proximity to each other were sorted together more often by individuals than those farther apart.

In a similar manner, *point rating maps* graphically display the relative ratings of these ideas via the height of each point, as shown by the stacked points in Figure 2.

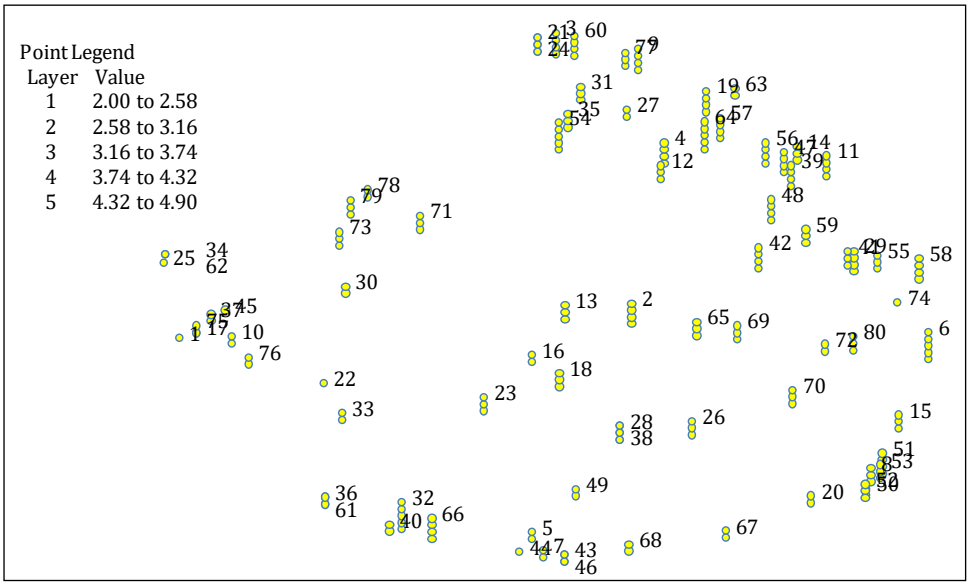


Figure 2: Point rating map.

A *cluster map* shows the grouping of similar ideas into clusters, as shown in Figure 3.

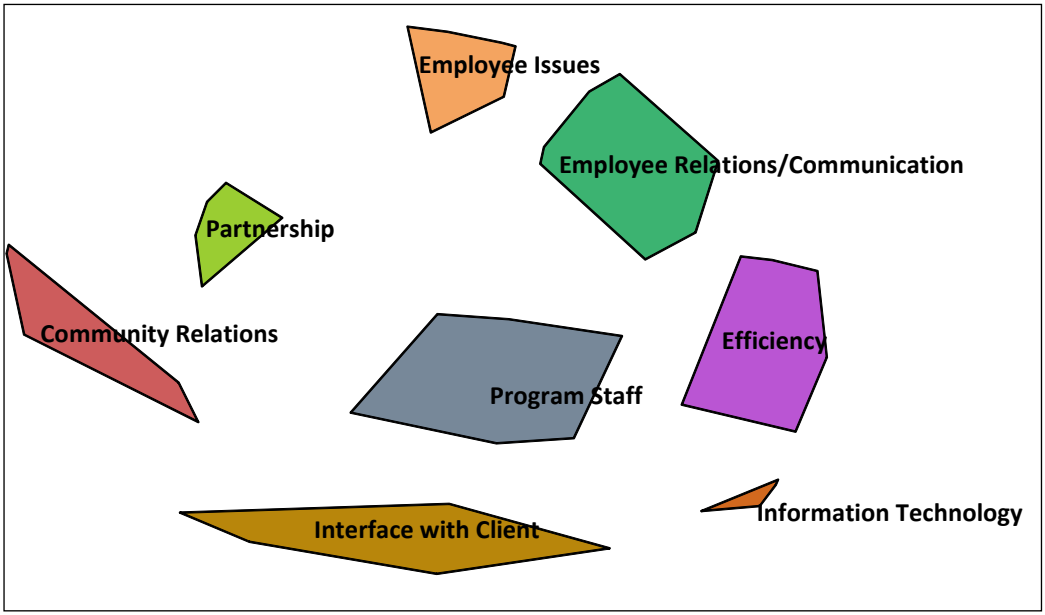


Figure 3: Cluster map.

Cluster rating maps, such as the one shown in
Figure 4, graphically display the relative averaged ratings of the ideas contained within each cluster. In this, the height or layers of a cluster indicates the relative average value of its contents.

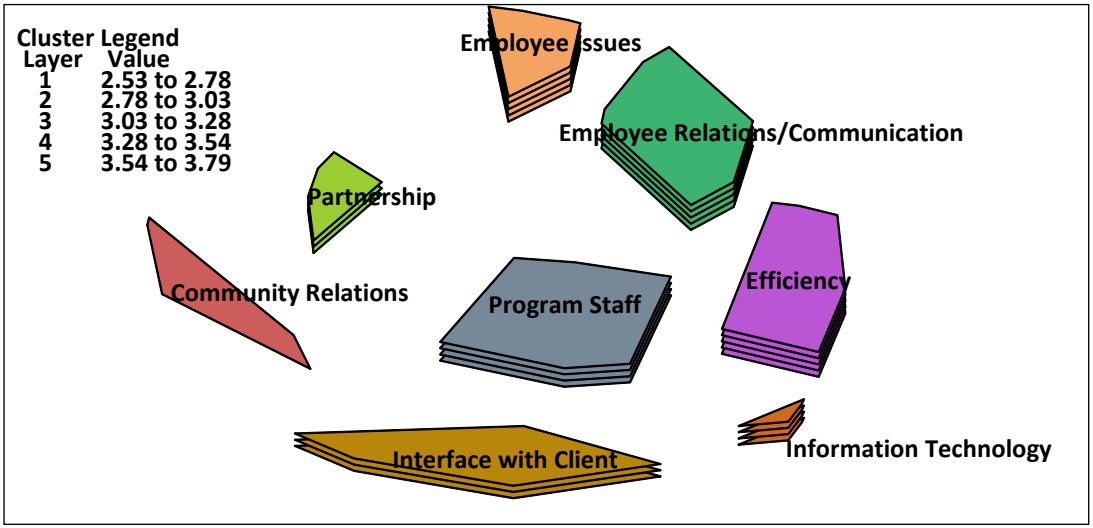


Figure 4: Cluster rating map.

A *pattern matching* report displays absolute or relative cluster ratings between two cluster sets, such as different demographic groups, points in time, importance or feasibility.

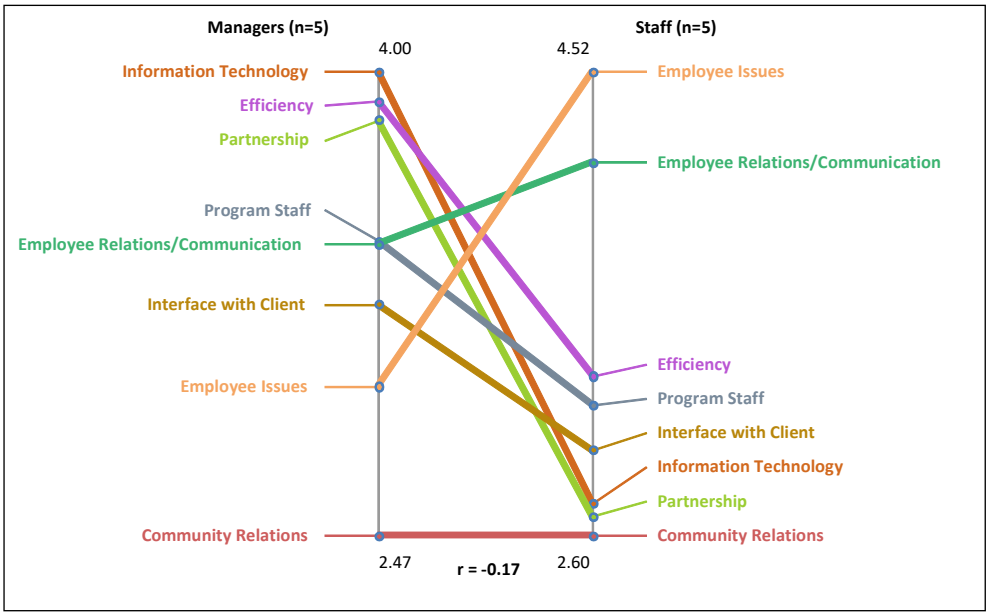


Figure 5: Relative pattern matching report of cluster importance ratings for managers compared to staff.

A *Go-zone* report graphically displays which ideas are above or below the mean across two separate rating criteria or participant groups, *within a specific cluster of ideas.*

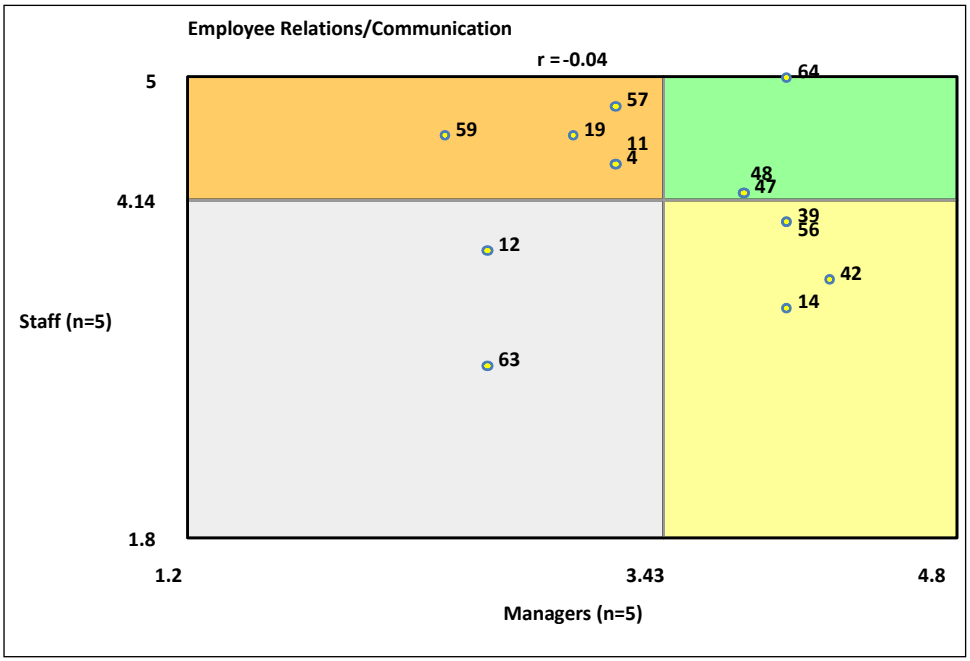


Figure 6: Go-zone report of importance ratings for managers compared to staff, for the Employee Relations/Communication cluster.

In addition, a wide variety of specific reports are now available in The Concept System® Global MAX™, including reports on statements, clusters, users, and respondent questions, brainstorming intervals, as well as printable documents and spreadsheets for manual sorting and rating of statements.

Using The Concept System® in Concept Mapping

The Concept System® is a proprietary suite of software tools that you use to define and execute a concept mapping process, and to perform the analysis of project data and generate concept maps and other reports.

Most concept mapping projects today are performed in The Concept System® Global MAX™ online application. The Concept System® Global MAX™ is a web-based application that lets you define, manage, and run a concept mapping project. Its functions include: defining the project and its focus prompt, adding and managing participants, creating a database of brainstormed statements from participants, sorting and rating the statements, performing the concept mapping analysis and generating results, including concept maps, pattern matching, go-zones, and reports.

A key feature of The Concept System® Global MAX™ is the ability for participants to interact with the concept mapping process remotely via the Internet. As its name implies, this tool enables concept mapping projects to become truly global in scope, allowing participants to perform brainstorming, sorting, and rating activities from anywhere in the world where they have access to a web browser.

Using The Concept System® Global MAX™ as an integrated process for a concept mapping project allows for the involvement of multiple groups of stakeholders, which may potentially include:

- A *facilitator* who oversees the concept mapping process, interacts with participants, coordinates brainstorming, sorting, and rating processes, performs the analysis, and leads the interpretation of maps and results. The facilitator is often the Project Administrator for the software, though the facilitator may delegate this role to someone else. The Project Administrator is assigned a username and password with the purchase of a project license.

- A *planning group*, established by the facilitator, who helps determine project objectives and desired outcomes, and may be involved in key decision-making aspects of the concept mapping process such as defining the ratings, rating scales, participant demographics, and naming clusters.

- One or more *participant groups* which are involved with brainstorming, sorting, rating, and, the use of results and evaluation of activities.

A summary of this process is shown below.

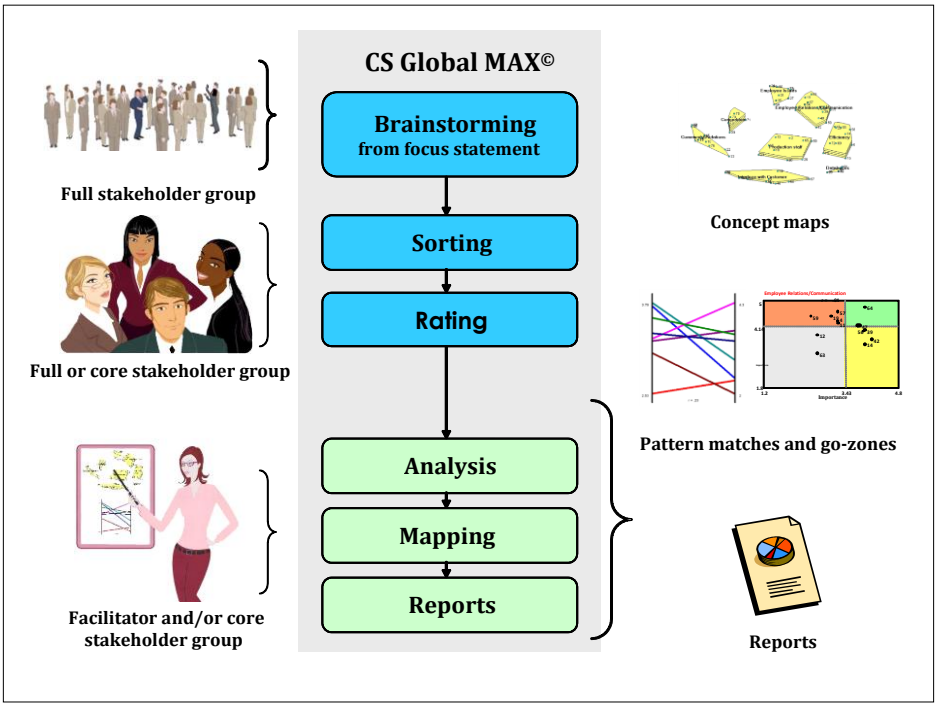


Figure 7: An overview of the concept mapping process.

The end result of this process is actionable information, based on the geography of participant ideas, which can be put to use in subsequent planning, evaluation, and/or research efforts.

You're Ready to Explore!

The following section of this manual provides a more detailed overview of the functions of The Concept System® Global MAX™ with detailed descriptions of each of its screens by functional area, followed by a complete step-by-step example of a sample concept mapping project.

If you are new to the concept mapping process, we encourage you to review this example as a guide to your own initial project efforts.

The Concept System® Global MAX™ is designed to be easy and intuitive to use, and simplifies the process of harnessing ideas and opinions of stakeholders for action.

This guide is intended to provide technical guidance for the process and use of The Concept System® Global MAX™. Information on concept mapping methodology and project design applications can be found in *Concept Mapping for Planning and Evaluation* by Mary Kane and William M.K. Trochim (Sage Publications, 2007). Additional guidance is provided through the products and services of Concept Systems, Inc., including Concept Mapping Facilitator Training, Advanced Training, or one of our special subject webinars. If you need technical assistance, we provide services to help.

The closing section of this Software Guide provides information on further resources for concept mapping, as well as ways to contact Concept Systems, Inc. (CSI) for additional support.

Concept Systems Global MAX ™: Functional Summary

The following Functional Summary contains detailed descriptions of each individual screen that may be encountered during the various phases of a project in The Concept System® Global MAX™. It applies to both the person running the project (Project Administrator), as well as the participants who visit the website to participate in the project. The **Table of Contents** is an excellent tool to help guide and facilitate the reading and understanding of the guide.

The Concept System® Global MAX™ is a web-based application that provides clear guidance to the user at each screen. This section provides a detailed overview of the screens, their purposes, and available options. There are two ways to request assistance at any time while you are using The Concept System® Global MAX™:

- The *Help* links, in the upper right-hand corner and at the bottom of the screen, provide on-line assistance and is available at any time.
- "Tool tips", available anywhere you see the blue question mark icon (), provides short descriptions of individual fields and functions on specific screens.
- The Home icon (home), in the upper right-hand corner of the screen, returns the user to the project home page.

GENERAL SCREENS (Project Administrator Only)

The General Screens section describes screens that are used to enter, configure, and manage a concept mapping project using The Concept System® Global MAX™. These screens and their functions are available to Project Administrators only. The functions discussed here include:

- Sign-in
- Project home page and status
- Project settings
- Content management of project data screens
- Participant data screen previews and URL addresses
- Participant management
- Respondent questions
- Statements
- Analysis
- Reports
- Bulletins and messages
- Exporting data
- Internal Notes

The Concept System® Global MAX™ Sign-in Screen

Figure 8: The Concept System® Global MAX™ sign-in screen.

This is the first screen that is seen after entering The Concept System® Global MAX™ URL in your browser [www.conceptsystemsglobal.com]. Sign in is accomplished by using the user name, or e-mail address, and password assigned by Concept Systems, Inc.

Below the *Sign-In* button there are three hyperlinks to use to sign up for a new account, view existing project list, or retrieve a lost password.

The Concept System® Global MAX™ Home

The Concept System® Global MAX™ Home page is the entry point to the Concept Systems Global application after signing in. It contains a list of current project(s). Click on the hyperlink for a project title to enter the desired project.

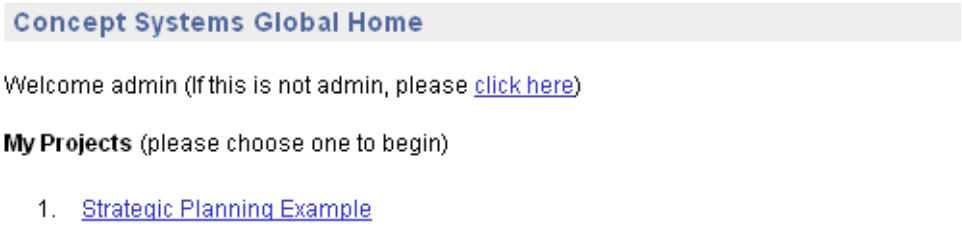
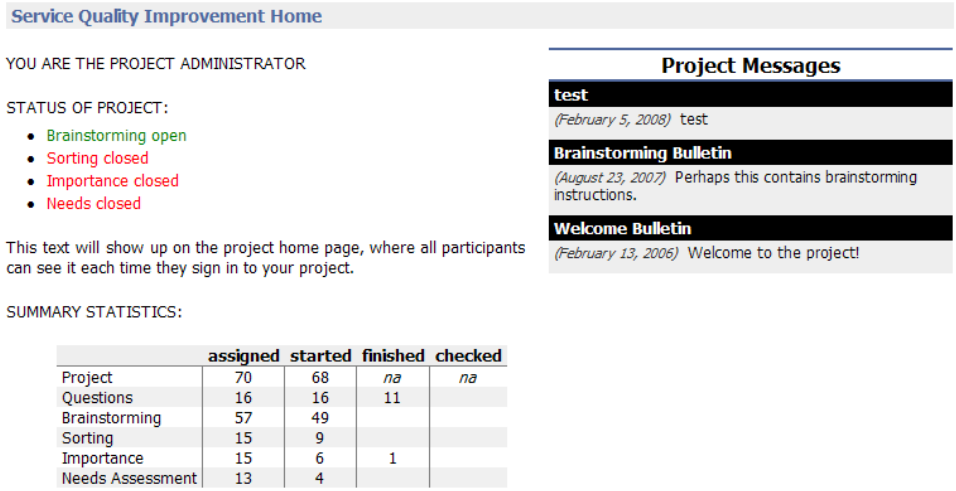


Figure 9: Example of the project list screen.

Project Home

The Project Home screen lists the Project Administrator's current project status, and is the portal for the remaining activities in the selected project.



	assigned	started	finished	checked
Project	70	68	*na*	*na*
Questions	16	16	11	
Brainstorming	57	49		
Sorting	15	9		
Importance	15	6	1	
Needs Assessment	13	4		

Figure 10: Example of the Administrator's Project Home screen.

Features of the home screen include:

Status of Project: This section provides information about what parts of your project are open (ongoing) or closed (completed). Open project areas are shown in **green** and closed project areas in **red**.

Note: The brainstorming section of a project cannot be open at the same time as the sorting and rating sections, because sorting and rating requires a complete set of brainstormed ideas. Which sections of the project are open at any given time is controlled via the **Project Settings** menu.

Summary Statistics: The Summary Statistics section provides a visual overview of the project status, including how many participants have been assigned, which participants have started and finished their activities, and which data the project administrator has 'checked'. The Summary Statistics section is used and viewed solely by authorized Project Administrators.

Project and Administrator Menu Options

Once logged in to a project, the left side of the screen will provide a listing of the main program options, as shown in the corresponding figure.

My Account	**Link to main page**
	Account options
My Projects	-Return to list of all projects under this account
Edit Profile	-View and edit account profile
Change Password	-Change password
Sign out	-Sign out
Administrator	**Administrator options**
Project Settings	-Manage project phases and create focus statement
Content Manager	-Customize screen text/instructions
Project Preview	-Review participant screens
Participants	-Create/manage participants and their data
Participant Questions (3 of ∞)	-Define participant questions/demographics
Statements (80)	-Manage brainstormed statements
Ratings (2 of ∞)	-Manage statement ratings
Analysis	-Conduct analysis on project data and generate maps
Reports	-Generate data and/or analysis reports
Project Bulletins (0)	-Create/edit/send participant bulletins
E-Mail Messages (0)	-Create/edit/send participant e-mail communication
Internal Notes (0)	-Create and share internal administrator notes

Figure 11: CS Global MAX™ My Account and Project Administrator menus.

Project Settings

The Project Settings screen enables the Project Administrator to set configuration options, define the project's *focus statement*, control open and closed activities, and set levels of access for participant registration.

Project Settings

Edit your project settings. Click on the help icons to get more information about each available setting.

General Settings	Action
header text	CS Global MAX Sample Project
project abbreviation	CSGMAXsample
project theme	ocean
logo image file	Browse... No file selected.
focus statement	A specific action that the North County Department of Social Services could implement over the next five years to improve its culture and level of service is...
focus statement font size	12px
Sorting Instructions Window Width	
Sorting Instructions Window Height	
brainstorm max chars	250
default sort method	Tabletop Sorting
Hide optional profile fields	☐
Hide anonymous username and password	☐
Use secure participant links	☐
Hide admin on Informed Consent page	☐
Skip brainstorm thank you screen	☐
Skip sorting thank you screen	☐
Skip rating thank you screen	☐

Participant Questions view	Action
Ask participant questions at brainstorming.	☐
Ask participant questions at sorting.	☐
Ask participant questions at Needs Assessment.	☐
Ask participant questions at Importance.	☐

brainstorming	Action
brainstorming active	☐
brainstorming registration	anonymous

sorting	Action
sorting active	☐
sorting registration	self-registration

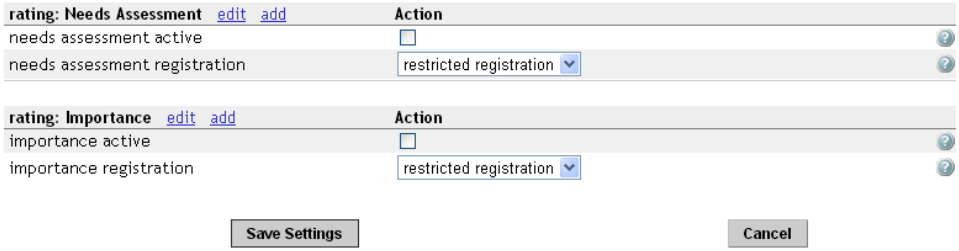


Figure 12: Project Settings screen.

General Settings control basic options for the set-up and display of a project. Fields include:

- **Header text:** This field specifies the text that will be displayed in the top header area. There is an 80 character limit to the header text with or without spaces.

- **Project abbreviation:** The project abbreviation is a unique shortened version or acronym of a project name which participants will use to access the project, and will be part of the project's URL address. Use only letters or numbers for this name, with no spaces or special characters.

- **Project theme:** Choose from one of several pre-defined color schemes for your project, including screen colors, text colors and highlights, using a drop-down menu. Options include *concept*, *ocean*, *salmon*, *steel*, *earth*, *tree*, and *tropical*.

- **Logo image file (optional license upgrade):** This button allows the Administrator to upload a logo image file as a header for this application. Use '.gif' or '.jpg' format with a maximum size of 50 pixels tall by 400 pixels wide, to fit in the header area.

- **Focus statement:** The focus statement or 'prompt' is typically an open-ended statement that focuses participants on the goals of the project by

prompting them to brainstorm ideas that finish the incomplete statement.

- **Focus Statement Font Size:** This menu allows you to adjust the font size of the focus prompt displayed on the brainstorming screen.
- **Sorting Instructions Window Width:** Specify (in pixels) the width of the tabletop sorting instructions window. The default width is 700 pixels if no width is specified.
- **Sorting Instructions Window Height:** Specify (in pixels) the height of the tabletop sorting instructions window. The default height is 450 pixels if no height is specified.
- **Brainstorm max chars:** This option sets an upper character length limit for participant brainstorming statements.
- **Default sort method:** This field allows you to set the standard view for sorting (participants retain the ability to transfer to another sorting view, if desired). Choose from tabletop or dropdown options.
- **Hide Optional Profile Fields:** This option will allow you to hide the optional profile fields, leaving only the required fields (username, password) when participants create a self-registered account.
- **Hide anonymous username and password:** When this is enabled, it will prevent this display of a randomly generated anonymous username and password to anonymous participants. Turn this option on if you do not want anonymous participants to be able to sign back into the same session.
- **Use Secure Participant Links:** When this option is enabled, the participant links will encrypt the participant information (using SSL) when sending participant data. It is recommended that participants use up-to-date browsers if this option is enabled to avoid certificate issues.

- **Skip Brainstorming, Sorting, Rating Thank You Screens:** When these options are enabled, the thank you page at the end of a section will be skipped and participants will be redirected directly to the project homepage when completing a section.

The **Participant Questions** (Demographics) section contains check boxes to specify if the Administrator wants to collect answers to participant questions during the brainstorming, sorting, and/or rating phases of a project. Please note that the questions asked during all selected phases must be the same set of questions.

The **Brainstorming Active, Sorting Active** and **Rating Active** sections let the Administrator enable the specific phases of a project, and set access and response length options.

Note: *The Sorting Active* or *Rating Active* options cannot be enabled until there is a statement set in the system and the Administrator has unchecked the *Brainstorm Active option*, via the **Project Settings** menu.

The **Brainstorm Registration, Sorting Registration** and **Rating Registration** are drop-down menus that define the way participants will register their participation in the project. Registration types are as follows:

- **Anonymous.** Participants do not need to create an account, and can participate in each active phase the Administrator has set to anonymous registration. Participants may return to their saved data if they record their automatically generated user name and password when accepting an anonymous invitation link.

- **Restricted registration.** The Administrator must register participants by creating a user name and password for each participant. Once registered, the Administrator must assign each participant to project activities. Restricted registration is recommended for sorting and rating

activities, so that registered participants can visit the site multiple times, using their registration information, to edit or complete their activities.

- **Self-registration.** Participants register themselves by creating a user name and password. They are automatically assigned to project activities via the participant link the Administrator has provided. Self-registration is recommended for sorting and rating so that participants can visit the site multiple times, to edit or complete their activities.

Note: If different registration types for the sorting and rating phases for a project are specified, participants will see both registration options from the participant sorting and rating web pages.

Content Manager

The **Content Manager** menu lets the Administrator customize the introductory text of each activity page (brainstorming, sorting and rating). It contains a list of participant activities, linked to a screen where the introductory text can be edited with plain text and/or HTML codes.

Content Manager

The tool enables you to customize the text in the introductory paragraph of each participant area. Note that this is important instructional text that all participants will see and use. Click on the name of the area for which you want to change the content. The areas and tasks are sequenced below in the order that a participant will see them.

General Project Areas	Content
1a. Informed Consent	*Default value*
1b. Introduction To Project	*Default value*
1c. Home page	Please click the Analysis hyperlink to explore the new analysis functionality av...
1d. Question Label (singular)	*Default value*
1e. Question Label (plural)	*Default value*
1f. Answer questions instructions	*Default value*
1g. Sign-up [for self-registration]	*Default value*
1h. Informed Consent label	*Default value*
1i. Project Completed Message	*Default value*
1j. Answer Questions Thank You	*Default value*

Brainstorming Areas	Content
2a. Brainstorming Instructions	Brainstorming Statements - In the text box below, type a statement that complete...
2b. Focus Prompt Comments	*Default value*
2c. Brainstorming Thank You	*Default value*

Sorting Areas	Content
3a. Statement Drop Down Sorting Instruct	*Default value*
3b. Statement Tabletop Sorting Instructions	*Default value*
3c. Sorting Thank You	*Default value*

Rating Areas	Content
4a. General Rating Instructions	*Default value*
4b. Rating Thank You	*Default value*

Figure 13: Administrator Content Manager screen.

The link for each participant activity displays either the default introductory text, signifying that it has not been modified, or the revised content.

Each line also contains the following icons:

 The pencil icon takes the Administrator to the screen to edit the page text. The hyperlinked title of the participant activity page can also be clicked to reach this screen.

The "X" icon will become red and clickable once the default text has been edited. Selecting this icon will delete the project Administrator's inserted text and revert to the default text for this page.

The question mark icon, when selected, will display a "tool tip" summarizing the current introductory text for the participant activity page on that line.

When selecting a participant activity page for editing, the Administrator will go to a screen with the default introductory text in the top text box, and a blank field below where new text can be entered. This field also contains a menu of icons, similar to popular word processors such as Microsoft Word®, allowing text formatting activities such as cut, paste, bold/italic/underline, bullets and numbering, special symbols, hyperlinks, and text coloring from external documents.

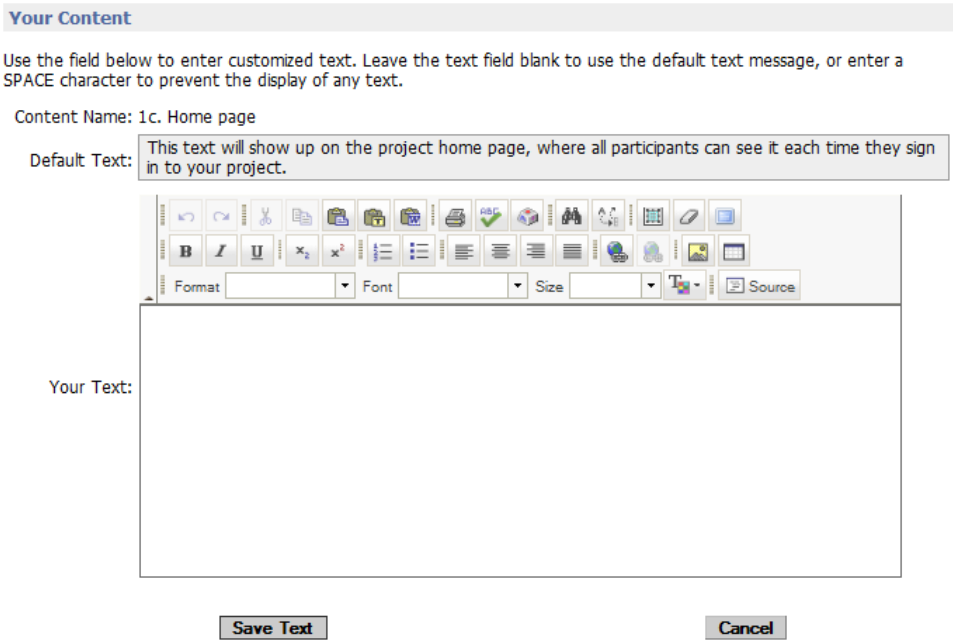


Figure 14: Example of Editable Text Fields in the Content Manager.

Text fields that can be changed in this menu include:

- **General project areas** including the *Informed Consent* notice and label, project introduction, *Home Page*, *Question* label and instructions, and participant *Sign-up* instructions.
- **Brainstorming** instruction text, focus prompt comments, and participant thank-you text.
- **Sorting** instructions, for "Tabletop Sorting" and "Drop Down Sorting" views, and participant Thank-You text.
- **Rating** instructions and participant Thank-You text.

A button at the bottom of this screen (Preview your changes >>) links the Administrator to the **Project Preview** menu (also available via the **Administrator** menu in the left pane), to preview the results of your text changes on samples of the actual participant screens.

Project Preview

The **Project Preview** menu allows the Administrator to see a preview of the screens that project participants will see. The participant links for self or anonymous registration are also provided on this screen.

Note: In the Project Review mode, read-only preview screens cannot be modified. To change the contents of these screens, use the **Content Manager** menu.

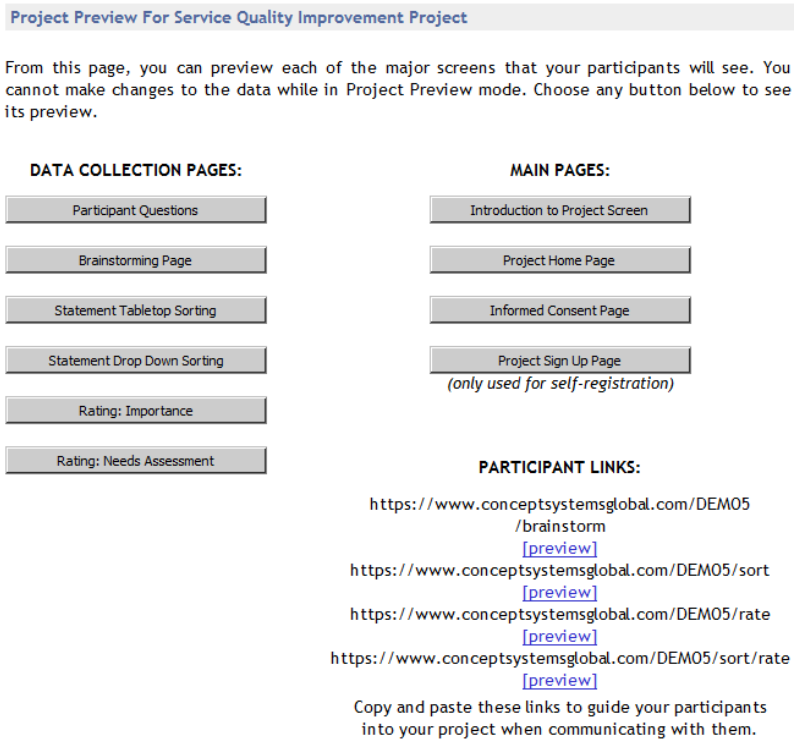


Figure 15: Example of the Project Preview screen.

Available preview screens in this section include:

Data Collection Pages:

- Participant Questions
- Brainstorming Page
- Statement Tabletop Sorting
- Statement Drop Down Sorting
- Rating

Main Pages:

- **Introduction to Project Screen** – A screen that each user sees with anonymous or self-registration, and asks the participant to "Continue Anonymously", "Sign-up", or "Sign-in" to access a project.
- **Project Home Page** – The main project page.
- **Informed Consent Page** – A required page for participants to accept terms of informed consent for the project.
- **Project Sign-Up Page** – Registration page for participant self-registration option only.

Participant Links:

This section provides a list of web links the Administrator can cut, paste, or type to send to participants who will be brainstorming, sorting, and/or rating.

Note: Until participant statements and rating questions are created in the system, some screens for specific project sections are grayed out or do not appear on the menu, and thus cannot be previewed.

PARTICIPANT MANAGEMENT SCREENS (Project Administrator Only)

This section outlines functions used to invite participants and manage their concept mapping project activities. These functions include participant registration, assignment, and review of responses.

The **Participants** menu allows the Administrator to view and manage participants in a project, and lists participation statistics for all participants.

Manage Participants

Participants invited to a project using the **self-registration** or **restricted-registration** options are displayed by user name. Anonymous participants are displayed using a system-generated user name (such as ANON356).

Choose which participants to display by using the drop down "Display" menu. Options include: *All participants, Only Registered Participants* and *Only Anonymous Participants.*

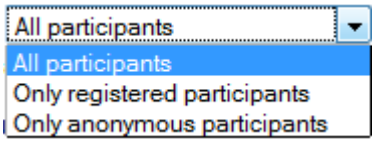


Figure 16: Example of the participants drop down menu.

All participants are listed in a table as shown:

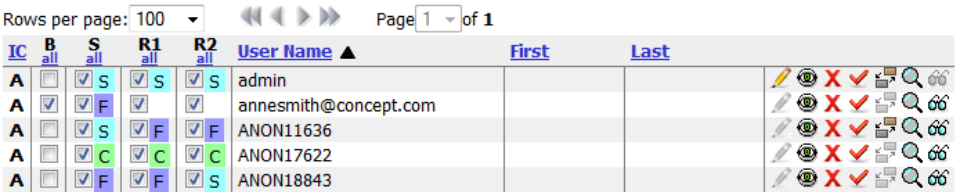


Figure 17: Example of the Participants List found on the Participants screen.

A legend at the bottom of the participant list explains the meaning of each of the column values:

IC	Meaning
I	Invited
A	Accepted
R	Rejected

Code	Assignment
B	Brainstorming
S	Sorting
R1	Importance
R2	Needs Assessment

Status	Meaning
✓	Assigned
S	Started
F	Finished
C	Checked

Icon	Action
	Edit Profile
	View Profile
X	Remove From Project
	Assign Activities
	Enter Numeric Sort
	Review Responses
	Assume Identity

Figure 18: Example of the Participants Screen legend.

The **IC (invitation code)** column lists a participant status of **I** (invited), **A** (accepted) or **R** (rejected). When a participant is added via the *Add New Participant* button, he/she will have a status of **I** until he/she accepts or rejects the participation invitation via the informed consent page of the project.

The **B (brainstorming)**, **S (sorting), and R1, R2, etc. (rating)** columns can be checked to assign each participant to brainstorming, sorting, and rating activities, respectively.

A turquoise **"S"** symbol means the participant has *started* that particular activity. This appears when the participant selects the project assigned activity. A purple **"F"** symbol means the participant has *finished* that particular activity. A green **"C"** symbol means you have *"checked"* (or "approved") the participant data, for inclusion in analysis in CS Core.

The First and Last Names column will show participants names if that information is provided during self-registration.

The following icons allow the Project Administrator to manage options for each participant:

Edit Profile: - Takes the Administrator to the **Edit Profile** menu to *change* participant profile information.

View Profile: - Displays the participant profile with *read-only* access.

Remove from Project: - Deletes the participant and all of that participant's sorting/rating data from the project. This function will prompt the Administrator prior to actual deletion.

Assign Activities: - Takes the Administrator to the **Assign Participant Activities** menu, where restricted registration participants can be assigned to brainstorming, sorting and/or rating, and project administration activities. Brainstorming, sorting and rating assignments can also be made directly using the check boxes on the participant list. Project Administrators can also be assigned through this feature. Save these assignments during data entry using the *Save Assignments* button.

Enter Numeric Sort: - Takes the Administrator to the **Enter Manual Sort Data** screen, where a Project Administrator can enter sorting data for a participant that may prefer to sort offline, or for another reason is unable to participate directly through The Concept System® Global MAX™ website. Sorting data that was manually sorted using paper based materials can be entered by statement number.

Review Responses: - Takes you to the **Review Participant Responses** menu, where participant sorting and rating responses can be viewed and participant data marked as "checked", thereby allowing this data's use in the analysis process.

Assume Identity: - Assumes the identity of the participant, and allows the Administrator to view and edit a particular participant's response(s).

Project Totals

Below the participant list is a summary of participant and response totals which lists the number of participants who have been invited, (or have accessed the Informed Consent page), the number of people who have

accepted or rejected these invitations, and a breakdown of participants at each stage of the brainstorming, sorting, and rating activities.

Project Totals ***(including anonymous participants, SAVE to refresh statistics)*** *scroll to top*

B	S	R1	R2	70 Invited 68 Accepted 0 Rejected
57	15	15	13	Assigned
49	9	6	4	Started
0	0	1	0	Finished
0	0	0	0	Checked

Figure 19: Example of Project Participation Summary Statistics found on the Participants Screen.

Add New Participant

The Add New Participant screen allows the Administrator to add participants to a project.

An Administrator can add individual participants, including optional name and contact information, using the *Add New Participant* button. Multiple participants can also be added quickly, by e-mail address only, using the *Bulk Participant Entry* button.

Add New Participant

Please enter the e-mail address or username of the person. If the person you wish to invite does not exist, you will have the chance to create a person profile for them.

User Name or E-Mail:

Continue Cancel

Figure 20: Add New Participant screen.

After entering a new participant's email or user name, the *Continue* button will take the Administrator to a *New Participant* screen to complete the participant information.

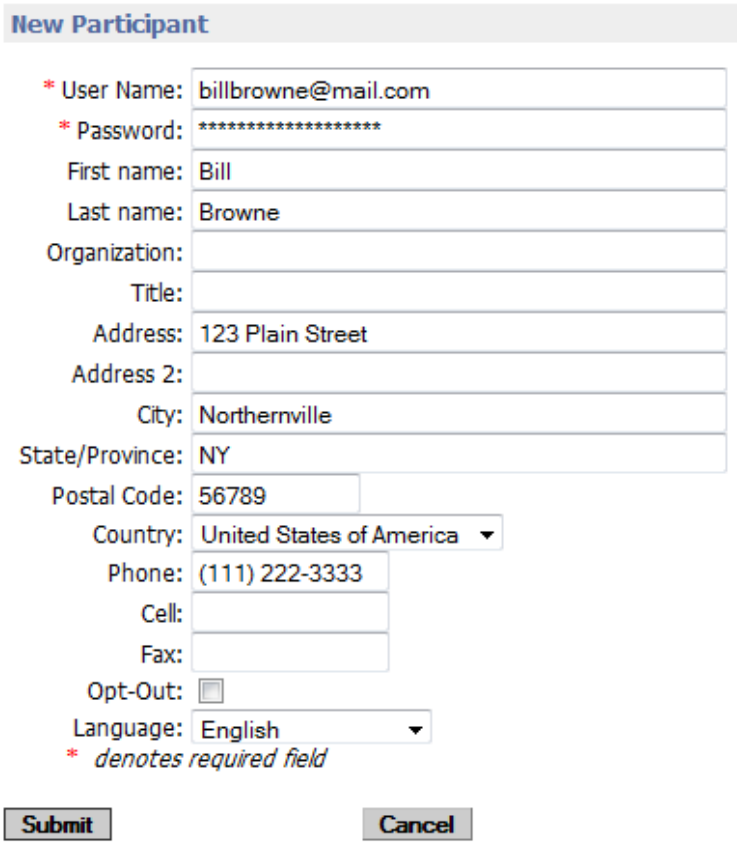


Figure 21: Example of the Add New Participant Personal Information screen.

Fields labeled with a red star are required. The Administrator can add the following contact information: *User Name, Password, First and Last Names, Organization, Title, Address, Phone Numbers, and Language*. If the "Opt-out" box is checked, the participant will not receive emails from the Project Administrator(s).

Note: The Administrator will not be able to view or edit a participant's password if that participant has already participated in a different project on www.conceptsystemsglobal.com using the same username.

Participant Invitation Links

The Participant invitation links section allows the Administrator to invite participants to various stages of the project. A project administrator can copy and paste these links into an email and participants may use the link and login based on the registration type. The tail end of the link indicates which stage of the project the invitation link pertains to.

This section is always found at the bottom of the **Participants** page.

PARTICIPANT LINKS:

https://www.conceptsystemsglobal.com/DEMO5/brainstorm
[preview]
https://www.conceptsystemsglobal.com/DEMO5/sort
[preview]
https://www.conceptsystemsglobal.com/DEMO5/rate
[preview]
https://www.conceptsystemsglobal.com/DEMO5/sort/rate
[preview]

Copy and paste these links to guide your participants into your project when communicating with them.

Figure 22: Participant Invitation Links.

Edit Participant

The Edit Participation screen allows the Administrator to view and edit registered participants' names and contact information. It is similar to the **Add New Participant** function described previously. This screen can be accessed via the pencil icon ( ) next to each participant.

Assign Participant Activities

The Assign Participant Activities screen, accessible via the check mark icon in the **Participants** page ( ), allows the Administrator to assign restricted registration participants to brainstorming, sorting and/or rating, and project administration activities.

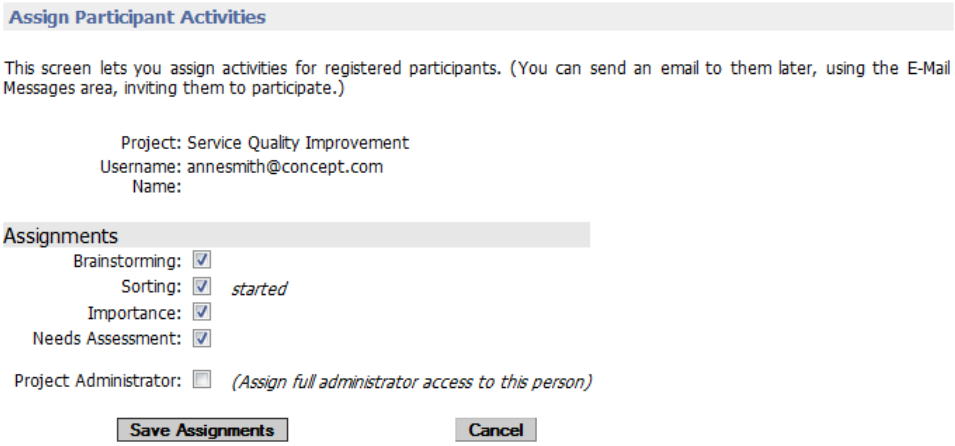


Figure 23: Assign Participant and Administration Activities screen.

These assignments can also be made in the **Participants** page by checking the boxes for the respective activities' columns on each participant row. These assignments can be saved during the data entry using the *Save Assignments* button.

Enter Numeric Sort

The Enter Numeric Sort button ( ), takes the Project Administrator to the Enter Manual Sort Data screen, where he/she can enter sorting data that was submitted by participants offline. The statements can be entered into each sort pile by statement number and separated by commas.

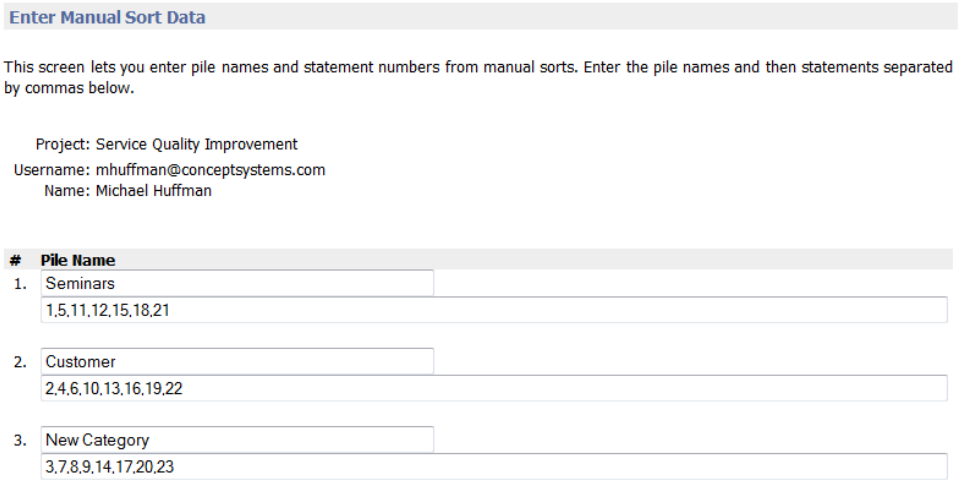


Figure 24: Example of the Enter Manual Sort Data screen.

Review Participant Responses

The Review Participant Responses screen acts as a tracking tool for the Administrator, displaying detailed progress on statement sorting and rating activities for a selected participant. This screen can be accessed via the magnifying glass icon ( ) in each participant row of the **Participants** page.

Review Participant Responses

Please indicate each activity as **Checked** if the participant met your survey requirements. Please save your changes at the bottom of this page to save the status as checked. Note that once an activity is checked then the participant can no longer make changes.

User Name: annesmith@concept.com

Sorting: Checked *Sorted **82** of 82 statements into **6** categories*

Opinions: drop box for gathering customer opinion that can be implemented *[2]*
conducting needs assessment and program evaluation for improvement *[1]*
hold weekly brainstorming sessions with program management teams *[3]*
develop better processes for involving people across departments/functions *[6]*
purchase more state-of-the-art equipment *[5]*

Workplace: investigate potential safety issues in the workplace *[8]*
coordinate the facilities' color schemes *[12]*
develop an employee evaluation process for all levels of staff *[23]*
change policy to encourage ongoing training of all employees *[18]*
close facilities that are too old or are underutilized *[9]*
encourage more teamwork *[25]*
start an in-house newsletter to improve employee awareness *[26]*
establish a 'quality circle' team approach for program employees *[4]*
move toward becoming a "learning organization" *[35]*
expand the number of program facilities by 25% in next five years *[55]*
focus on only the most effective programs *[42]*
improve cleanliness of offices and program locations *[59]*
improve communication among employees *[57]*
train management in not-for-profit management methods *[72]*

Figure 25: Example of the Review Participant Responses screen.

The system will state progress for each activity: "*Sorted **X** of **N** statements into **Y** categories", and "Rated **X** of **N** statements".* A participant must sort at least 75% of the statements in order for the Administrator to mark their sort as complete. There is no minimum threshold for the rating participation.

When a participant's responses are "checked" in CS Global Max™, they will be considered "Approved" and able to be included in the analysis process.

Note: Once an activity has been "checked", the participant can no longer access the activity to make changes.

QUESTIONS SCREENS (Project Administrator Only)

This section discusses screens used to define and manage participant questions. These questions may be asked at any of the key stages of participation; brainstorming, sorting, or rating. Responses from these questions are used during the analysis and mapping phases of the project, to compare maps of responses between specific participant subgroups.

Participant questions can be asked at the brainstorming phase of a project, as well as the sorting and rating phases. Collecting this data at the brainstorming phase allows the Administrator to summarize information about those who participated, but does not allow connection of specific statements to specific individuals. Collecting this data at the sorting or rating stages allows for subgroup comparison analyses.

Questions/Demographics

The Questions/Demographics screen allows the Administrator to create and manage a list of demographics, or descriptive participant questions, that participants answer before they begin an assigned activity.

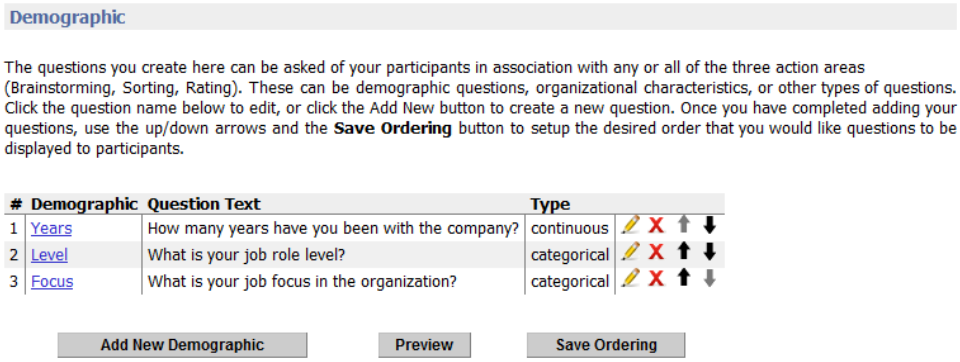


Figure 26: Example of the Administrator's Participant Questions List screen.

Selection of questions depends on the goals of the project, but might include questions like "What type of organization do you work for?", "How many years have you been with the company?" or "What is your gender?"

The label displayed in the **Questions** menu (in the example above, the label is "Demographic") is selected using the *Question Label* field of the **Content Manager** menu. This must be a singular word, because this label will also be used within other menus and participant screens, where a plural may automatically be added for these questions.

Use the **Participant Questions** section of the **Project Settings** menu to choose the project activity where these questions will be asked (shown below).

Participant Questions view	Action
Ask participant questions at brainstorming.	☐
Ask participant questions at sorting.	☑
Ask participant questions at Importance.	☑
Ask participant questions at Needs.	☑

Figure 27: Example of the Participant Question Settings Found on the Project List screen.

The responses to these questions, aggregated across participants, are commonly used during the concept mapping process to ensure adequate representation and to help create Pattern Matching and other displays that compare results; for example, how staff rate ideas compared to management, or how public sector participant responses compare to those representing the private sector.

The **Questions** menu displays a list of existing questions, each with the following options:

- Takes the Administrator to the **Edit** menu to change question language. Click on the question title link in the list to reach this menu as well.

X - Deletes specified question and the participant responses from the project. This function will prompt the Administrator prior to deletion.

- Arrow keys allow the Administrator to reposition this question up or down in the list to change the ordering of the questions.

The *Preview* button will display a preview of these questions as participants will see them, and the *Save Ordering* button will save the order in which the questions will be displayed.

To create new demographic questions, use the *Add New Demographic* button from the **Questions** menu. Question labels may be customized via the **Content Manager** menu, under "General Project Areas".

Add New Participant Question

This screen allows the Administrator to add a question to the list in the **Questions** menu.

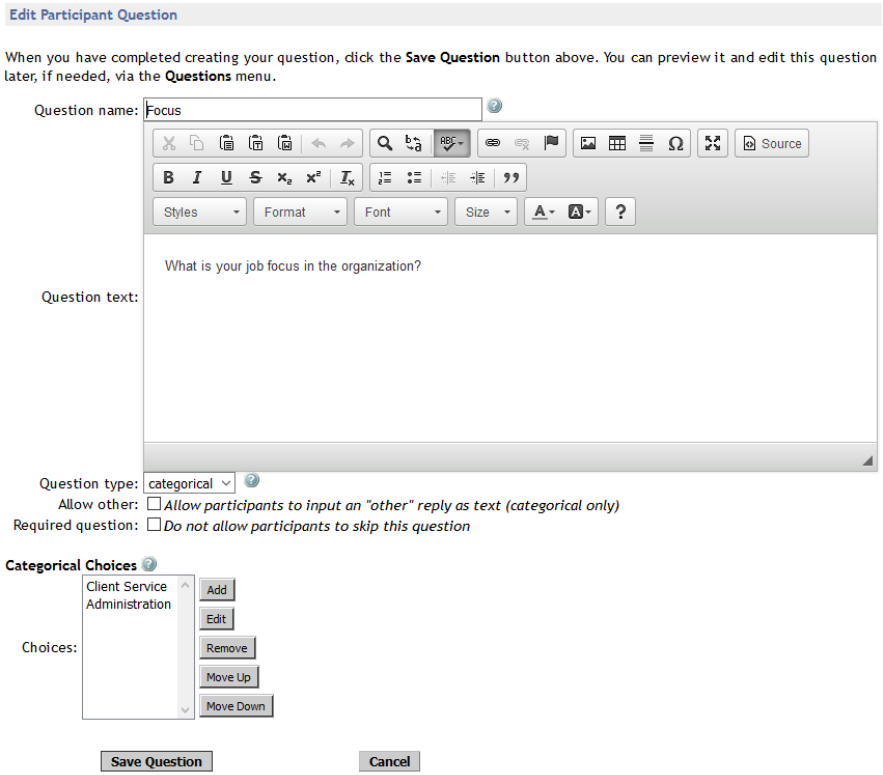


Figure 28: Example of the Add New Participant Question screen.

Enter a name for the question (which will serve as its title in the question list) and the question text, and select a *Categorical* or *Continuous* question type. Once a question has been entered, text can be modified by using the formatting bar icons for bold, italics, underline, numbering, bullets, or adding/removing hyperlinks, as shown above.

Categorical questions ask the participant to choose from a prescribed list of choices that you provide, such as a list of professions or geographic areas. This option presents the Administrator with the following menu to enter or edit response choices:

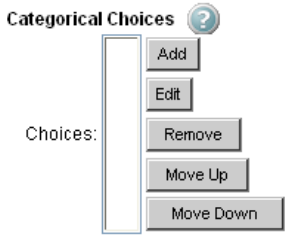


Figure 29: Example of the Categorical Choices options for Participant Questions.

The options buttons on this screen can be used to add, edit, remove or reposition Administrator choices within the list.

Allow other: When the *Allow other* option is enabled, a free-response text field will be included as a choice for the categorical question.

Allow multiple: When the *Allow multiple* option is enabled, participants will be able to choose more than one choice for the categorical question.

Required Question: The *Required Question* option, when enabled, will force participants to answer the question before moving forward onto the next participant question. The skip button is removed when this option is enabled. If this option is enabled with *Allow multiple* option, the participant must select at least one categorical choice.

Continuous questions ask the participant to enter a value within a numerical range.

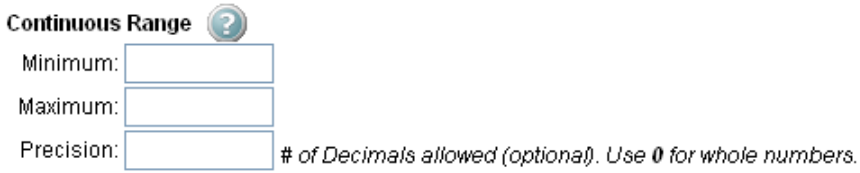


Figure 30: Example of the Continuous Range options for Participant Questions.

Enter the minimum value, maximum value and *precision*, the number of decimal places allowed for the answer. For example, if the Administrator wishes to allow increments of *0.25* in a numerical answer, so that participants can specify that they have been with the organization for, say, 3.25 years, specify two decimal places. For two decimal places, enter the number 2 in the Precision field. For whole numbers, use *0* or leave *blank*.

Use the *Save Question* button (Save Question) to save changes when completed.

Edit Participant Question

The Edit Demographic screen allows the Administrator to edit a question selected from the list in the **Questions** menu. Its functionality is similar to the **Add New Demographic** function described previously. Access this screen via the pencil icon ( ) next to each question, or by clicking on the question name.

Questions Preview

The Questions Preview screen displays a preview of questions from the **Questions** menu, as they will be seen by participants. Because this is a

preview screen, it is read-only. To make edits, use the Add New Demographic or editing functions from the **Questions** menu.

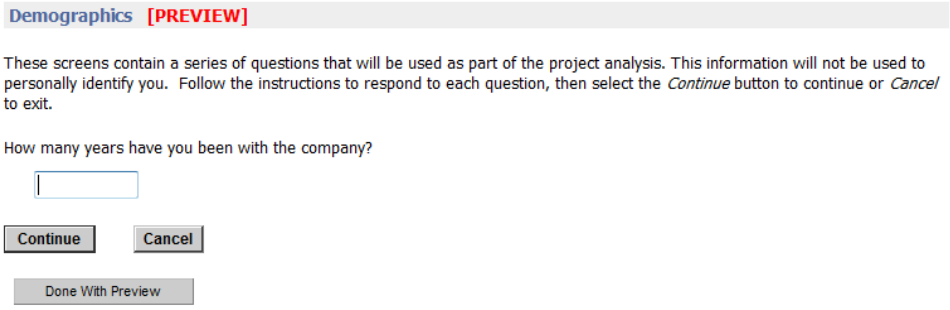


Figure 31: Example of the Participant Questions preview screen.

STATEMENT SCREENS (Project Administrators Only)

This section discusses screens used to import, export, and manage participant statements generated during the brainstorming phase of a concept mapping project.

In most concept mapping projects, the statement process involves two phases:

- The generation of raw idea statements by participants ("brainstorming").
- *Idea Synthesis*[2] in which the raw statements are reduced to a group of unique statements, edited for clarity and appropriateness to the project.

The functions outlined here facilitate both phases of this process, including how to import added or replacement statement sets.

Statements

The Statements screen allows the Administrator to create and manage the list of statements generated from the brainstorming phase of a project.

[2] Concept Mapping for Planning and Evaluation, by Kane and Trochim (Sage Publication, 2007) contains a complete description of the idea synthesis process.

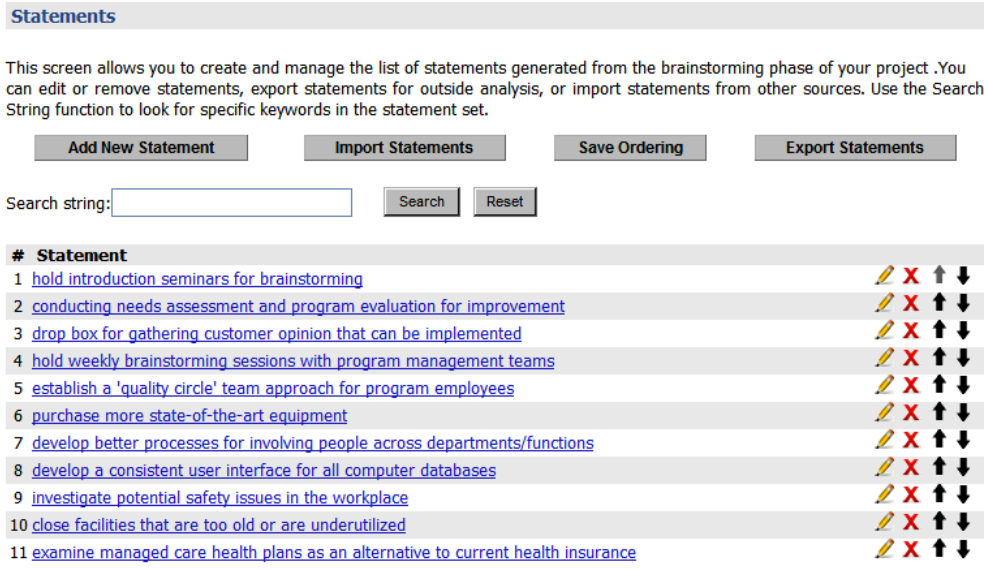


Figure 32: Example of the Statements screen.

Enter individual statements from participants using the **Add New Statement** button, or import them in bulk from a text file using the **Import Statements** button. If statements have been entered, this screen displays a list of existing statements, each with the following options:

- Takes Administrator to the **Edit Statement** menu to change statement data. This menu can also be accessed by clicking on the link for the statement text in the list.

X - Deletes this statement from the project. This function will prompt the Administrator prior to deletion.

- Arrow keys move the statement up or down in the list.

The *Save Ordering* button will save the current statement ordering, and should be used whenever the statement set ordering has been changed by using the arrow keys.

The *Export Statements* button will prompt the Administrator to save or open a text file containing the current statement list.

The *Randomize Statements* button (Randomize Statements) will shuffle the statement list and re-assign all statement numbers.

Note: Randomizing statements is a *permanent* operation and *cannot* be undone.

Add New Statement

The Add Statement screen adds a new participant statement to the statement list in the **Statements** menu.

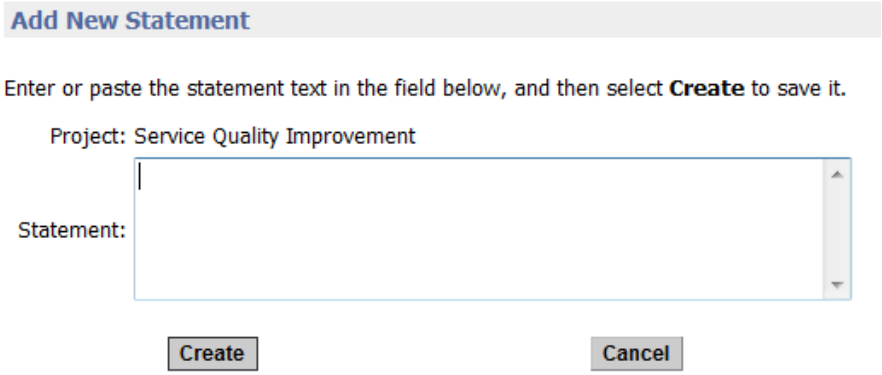


Figure 33: Example of the Add New Statement screen.

This function is designed to input a few statements from the brainstorming phase of a project. For large numbers of statements, the *Import Statements* function can be used (from the **Statements** menu) to import a statement list from a text file (.txt).

Import Statements

The Import Statements screen imports a text file of participant statements from the brainstorming phase of a project.

Note: This function will import only text (.txt) files. To import files from other applications such as word processors or spreadsheets, convert the file contents to a text file first.

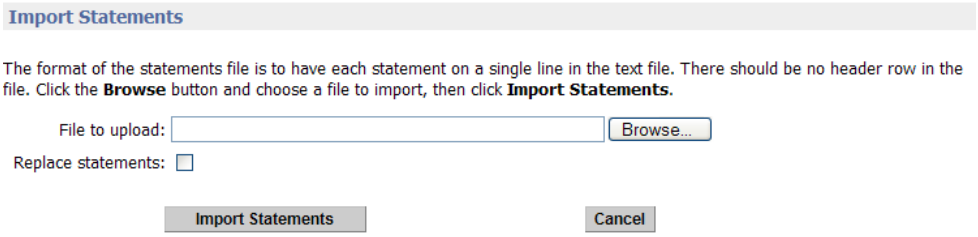


Figure 34: Example of the Import Statements screen.

The following details are important for successful importing of statement lists. Each statement must be on a single line in the text file. There should be no header row in the file. Click the *Browse* button and choose a file to import, then click *Import Statements*.

When the *Replace Statements* check box is checked, **all** statements currently in the list will be replaced with the imported statements.

- When collecting and adding participant statements to get one complete and inclusive list, this box should be left unchecked so that new statements will be appended to the existing list.
- When the Idea Synthesis has been completed, and the Administrator is prepared to input a revised and finalized statement list, this box should normally be checked. After input, the edited statement set will become the new set of statements.

Edit Statement

The Edit Statement screen allows the Administrator to edit a statement selected from the list in the **Statements** menu. It works like the **Add New Statement** function described previously. Access this screen via the pencil icon ( ) next to each statement, or by clicking on the statement text.

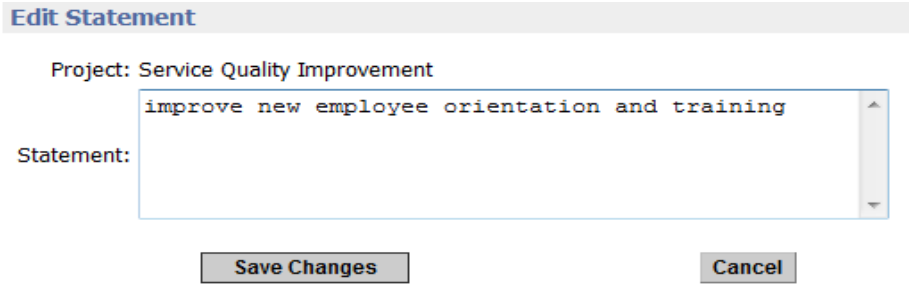


Figure 35: Example of the Edit Statement screen.

Note: When the statement set is activated for sorting participation, the participant sorting screen will automatically be populated with both the statement set and default instructions. Creation of a sorting screen via the **Administrator** menu is not needed.

Sorting instructions and options are addressed later in the software guide.

RATING SCREENS (Project Administrator Only)

This section discusses screens used to create and manage the ratings, and is accessible via the **Ratings** menu. Once a final set of statements has been established, the Administrator can ask participants to rate them on one or more scales. For example, an Administrator can ask participants to rate each statement on a scale from one to five according to how important they think the statement is.

The program allows a range of scale types. The rating data is used to create cluster rating maps that show aggregated ratings of specific statements and clusters, as well as reports that display comparative rating data, such as Pattern Matches and Go-Zones.

Participant responses to these ratings can be reviewed via the *Review Participant Responses* menu by clicking on the magnifying glass icon (🔍) in each participant row on the **Participants** menu.

Ratings

The Ratings screen allows the Administrator to create and manage one or more ratings, along with their rating scales, for the rating phase of a project.

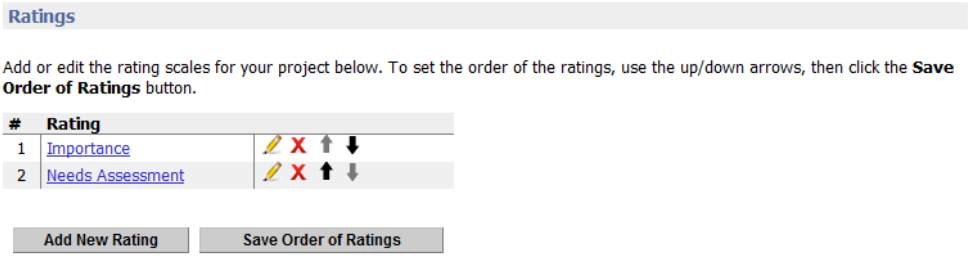


Figure 36: Example of the Ratings List screen.

Enter new ratings using the *Add New Rating* button. Once ratings have been entered, this screen displays a list of existing ratings with the following options:

- Takes the Administrator to the *Edit Rating* menu to change rating data. (Click on the link for the rating label in the list to access this menu as well.)

X - Deletes this rating from the project. This function will prompt the Administrator prior to deletion.

- Arrow keys move a rating up or down in the list.

The *Save Order of Ratings* button will save statement ordering during data entry.

Add New Rating

The Add New Rating screen allows the Administrator to add a rating to the list in the **Ratings** menu, via the **Add New Rating** function.

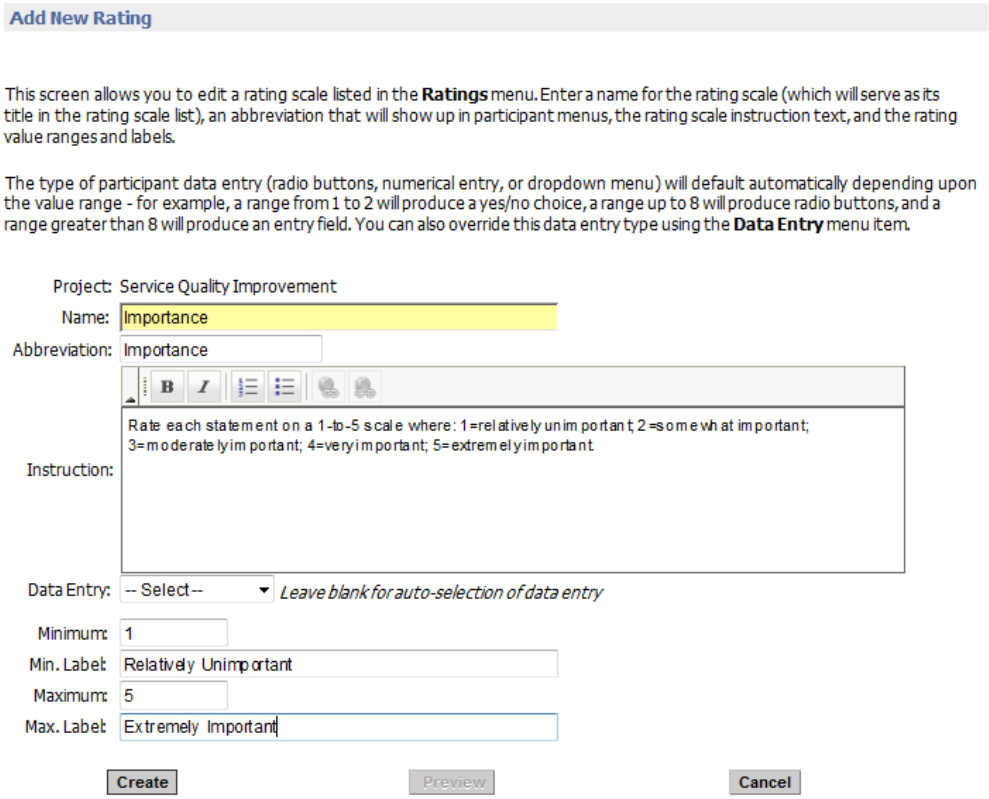


Figure 37: Example of the Add New Rating screen.

To create a new rating, enter the rating **name** (displayed in the ratings list), an **abbreviation** (displayed in participant screens), the rating scale **instruction** text (describing the scale), and the rating **value range** (the *minimum* and *maximum* scale values) and their **labels**.

The type of participant **Data Entry** (radio buttons, numerical entry, or dropdown menu) will default automatically depending upon the value

range. For example, a range from 1 to 2 will produce a *yes/no* choice, a range up to 8 will produce *radio buttons*, and a range greater than 8 will produce an *entry field*. The Administrator may override this data entry type using the **Data Entry** field.

Once entered, the Administrator can highlight and modify rating scale instruction text using the formatting bar icons for bold, italics, underline, numbering, bullets, or adding/removing hyperlinks, located below the rating name.

The *Preview* button in the **Add New Rating** screen shows a preview of this rating scale as seen by participants.

Edit Rating

The Edit Rating screen allows the Administrator to edit a rating scale listed in the **Ratings** menu. Its functionality is similar to the **Add New Rating** function described previously. Access this screen via the pencil icon ( ) next to each rating scale, or by clicking on the rating name.

ANALYSIS (Project Administrator Only)

This section discusses screens used to conduct analysis scenarios based on the participants' sorting and rating data. It is accessible via the Analysis menu. For more in depth learning about the concept mapping analysis methodology, consider attending one of the training options available through Concept Systems, Inc.

A concept mapping analysis scenario analyzes the project's participant sorting data, to create the basis for each concept map to be produced within that scenario. Each Analysis scenario can include a different set of sorting data. The Project Administrator can create and save different scenarios that include all participants who completed the sorting activity, or a subset of participants based on the responses to the participant questions.

Once a scenario has been created by selecting sort data and running the analysis, the Administrator will be able to create Concept Maps, Pattern Matches, and Go-Zones.

Note: Remember that before analysis on the sorting and rating data can be completed, all activities should be deactivated under the *Project Settings* menu, and each participant's data reviewed and marked as complete or "checked" under the *Participants* menu.

Create an Analysis Scenario

To create a new concept map analysis, click "New" in the Analysis Scenarios menu. To access an existing concept mapping analysis, select the analysis scenario in the "Select a scenario" dropdown menu. Once a scenario has been selected, the menus on the left side of the screen will populate with any maps, pattern matches, and go-zones that were created in this scenario.

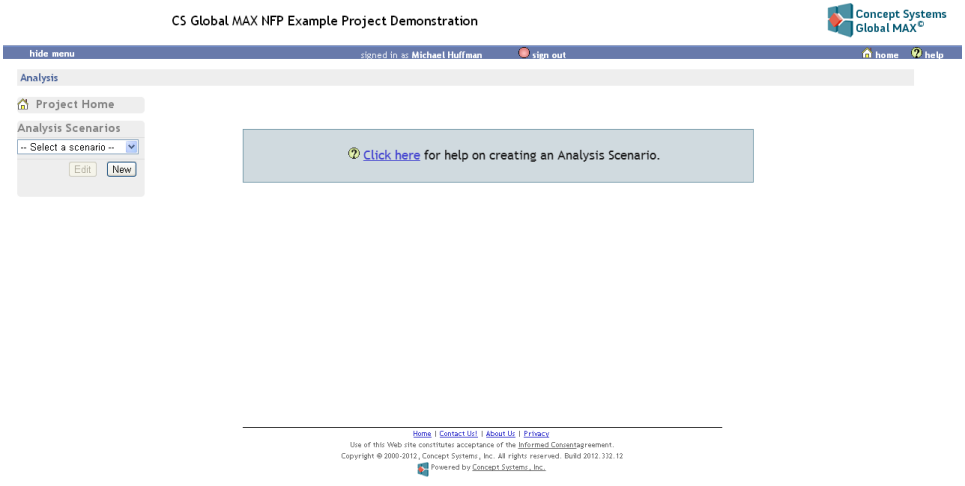


Figure 38: Analysis main screen.

Select Sorts for Mapping

A concept map can be drawn from any subset of sorting participants, though it is recommended to have 25-40 completed sorts. For example, the Administrator may want to view a concept map that includes sorts from only a certain subgroup of the users.

Scenario Properties

To name the scenario enter a new title into the Title box. The Administrator can create multiple scenarios while analyzing the project data, then select the "Preferred Scenario" check box to indicate that this is the scenario to use for further analysis products. To delete the scenario, click the "Delete Scenario" button.

To select participant sorts:

- To select or deselect all users: click on the 'All' or 'None' buttons above the listing of Users with Approved Sorts.
- To select users individually: click the check box to the left of each participant's name.
- To select/deselect multiple users anywhere in the list: check or uncheck each individual check box.
- To select sorts by Participant Questions:
    1. Click the "Add Condition" Button.
    2. In the Red Dropdown menu, select the appropriate participant question.
    3. Select an operator (=, <, >, etc.) from the middle select box.
    4. Enter search value:
        - If the variable is Continuous (i.e., Age), select a response value from the third dropdown box.
        - If the variable is Categorical (i.e., Employment Level), select a value from the box on the right.

To select participants based on two demographic variables or conditions:

1. Enter Condition 1 as explained above.
2. Click the "Add AND Condition" or "Add OR Condition" buttons and repeat the steps above to add additional conditions.
    - To select participants whose demographic information meets the first *and* second conditions select the AND option.

- To select participants that meet one condition *or* the other, select the OR option.

3. Enter Condition 2 in the same way as Condition 1 then click "Run Analysis & Save" to run the analysis on the selected data.

To delete a condition, click the red 'X' next to the condition.

Filter Method (Select one of the following):

The default filter method is No Filter. To use a filter, specify a similarity cutoff value. The value that is identified in the similarity cutoff box is applied to the final total similarity matrix. Values in the similarity matrix at or below the cutoff value are set to zero for the analysis. For example, if a value of 2 is specified, this means that if only 2 or fewer users placed two statements together in a pile, the analysis will treat it as though no users placed the statements together. This effectively filters out spurious relationships between statements. In a project where the subject matter is very ambiguous or where you suspect that there is a lot of noise in the sorts; you might try re-computing maps with a cutoff value of 1 or 2. It would be extremely rare to use a cutoff value greater than 2, unless there are a large number of available sorts for the analysis.

After selecting the appropriate sorting data, click "Run Analysis and Save."

After the analysis is completed, the stress value is displayed in the text box at the bottom of the window.

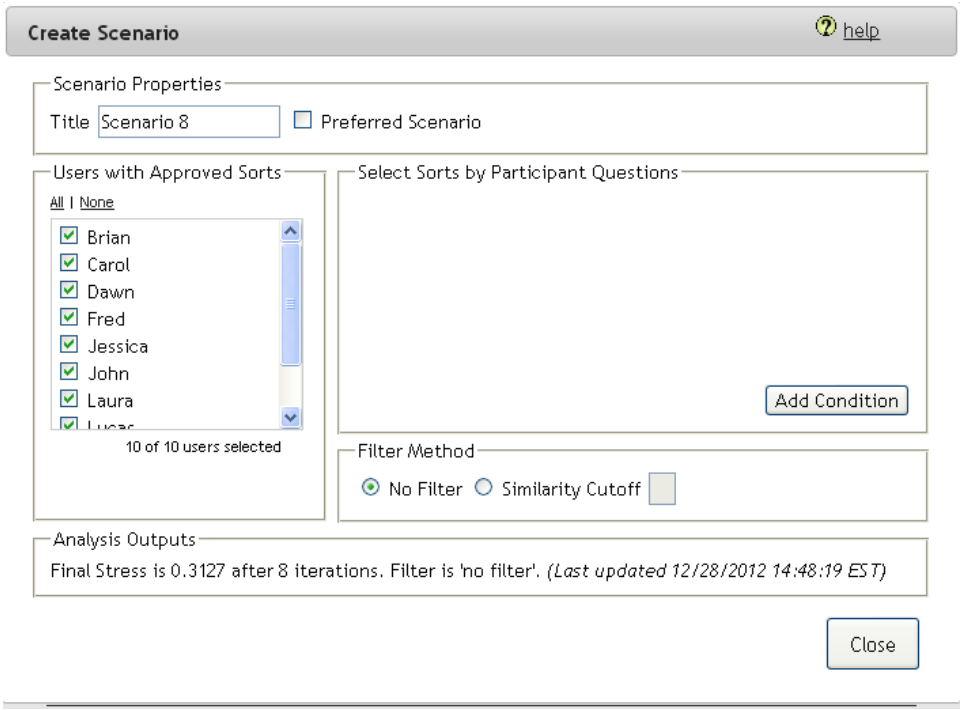


Figure 39: Create Scenario screen with users selected and analysis completed.

Create Concept Maps

From the **Concept Maps** field of the **Analysis** menu, click "New."

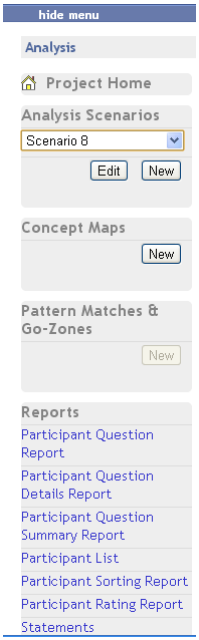


Figure 40: Analysis Menu as displayed once analysis has been run.

After creating a new analysis scenario, a point map must be created before any of the other maps can be created. Note that some maps need to be created before other maps or reports can be produced.

On the second screen, enter a title for the map, then click "Create" to continue.

To create some maps, select which previously created map to base the new map on before continuing. Use the dropdown menu to select a map.

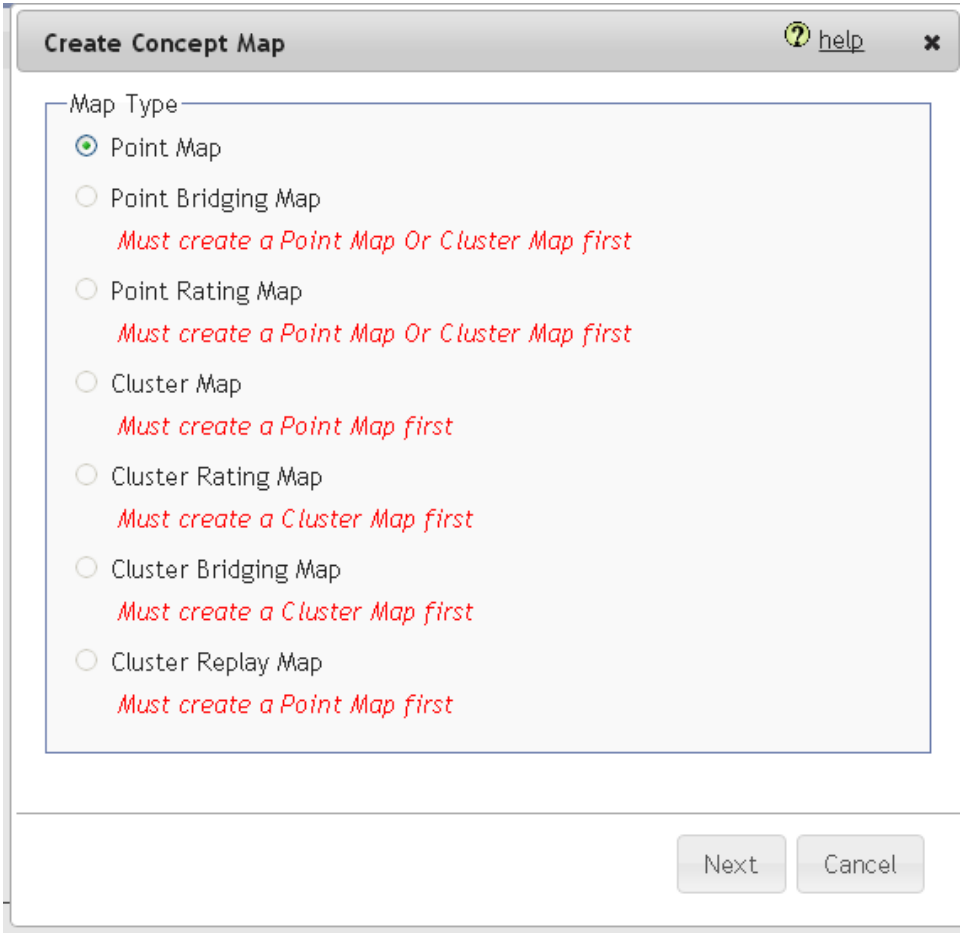


Figure 41: Create Concept Map screen.

Point Maps

A point map shows the statements as they were placed by multi-dimensional scaling.

Once a point map has been created, hover over a statement point to view the statement text.

Left-clicking a point brings up the “Point Details” window, displaying the statement text, a list of closest statements, and a check box to conduct a spanning analysis from this point.

A spanning analysis shows how frequently points on the map have been sorted together. To turn on the spanning analysis, place a check mark in the box. To deactivate the spanning analysis, uncheck the box.

Hovering over a statement will show how frequently that statement was sorted with the statement that was selected for the spanning analysis.

More details on these functions within maps are included in the *Interact with Maps* section of this guide.

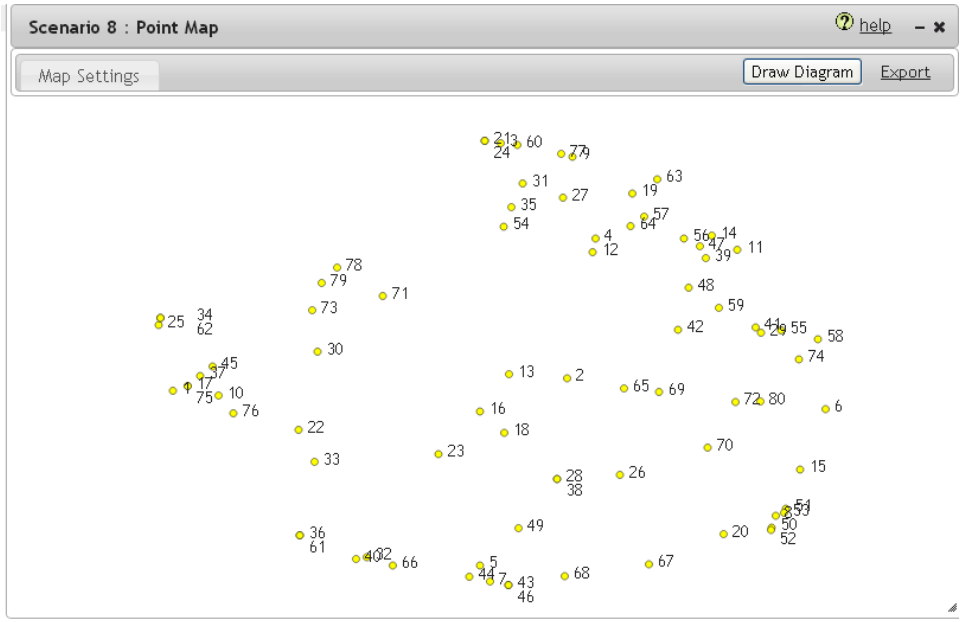


Figure 42: Example of a point map.

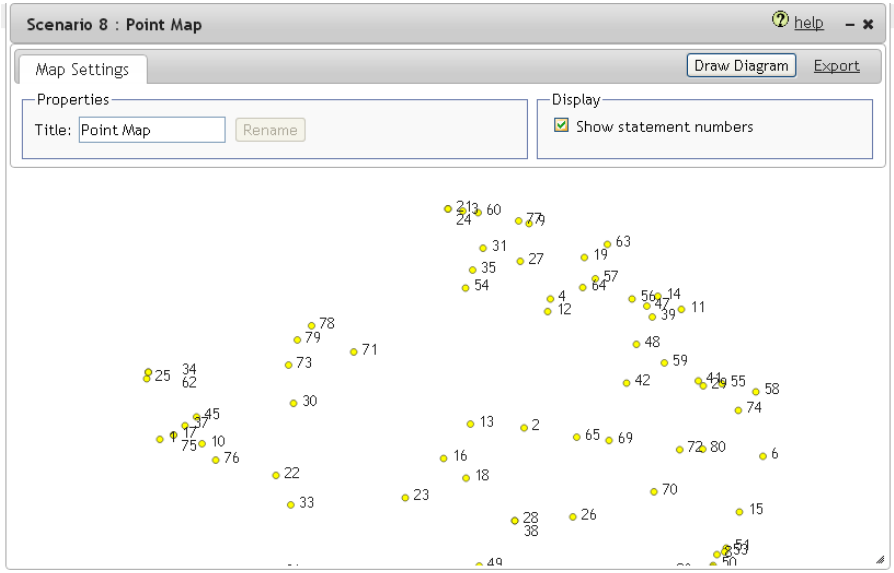


Figure 43: Example of a point map with Map Settings options selected.

Point Bridging Map

A point bridging map shows which statements are anchors in a specific area of the map and which ones are bridging across different areas of the map.

Left-clicking the top point of a stack brings up the "Point Details" window, displaying the statement text, a list of closest statements, a check box to conduct a spanning analysis from this point, and the bridging value of this point.

A spanning analysis shows how frequently points on the map have been sorted together. To turn on the spanning analysis, place a check mark in the box. To deactivate the spanning analysis, uncheck the box.

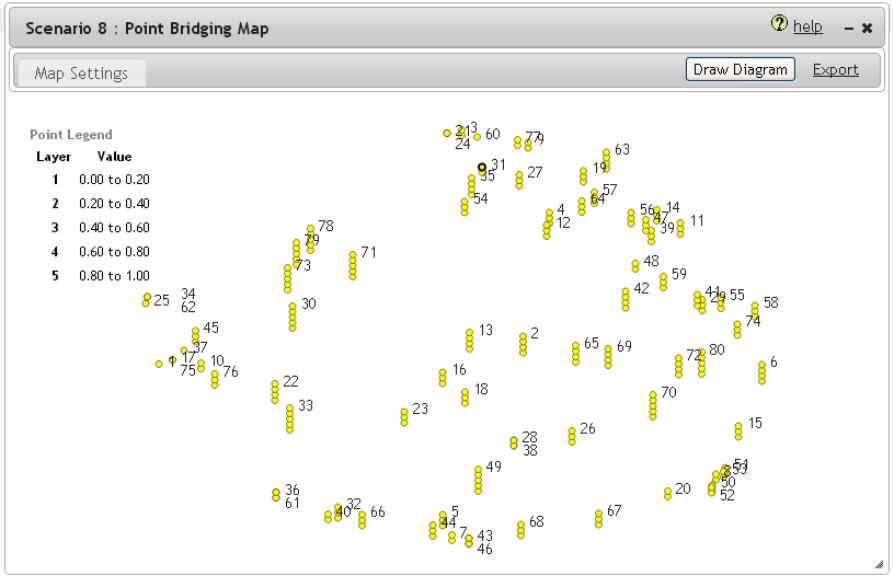


Figure 44: Example of a point bridging map.

Point Rating Map

A point rating map shows the numbered point map with average ratings overlaid.

Before drawing a map that reflects rating data, the Administrator must select the ratings to include in the map.

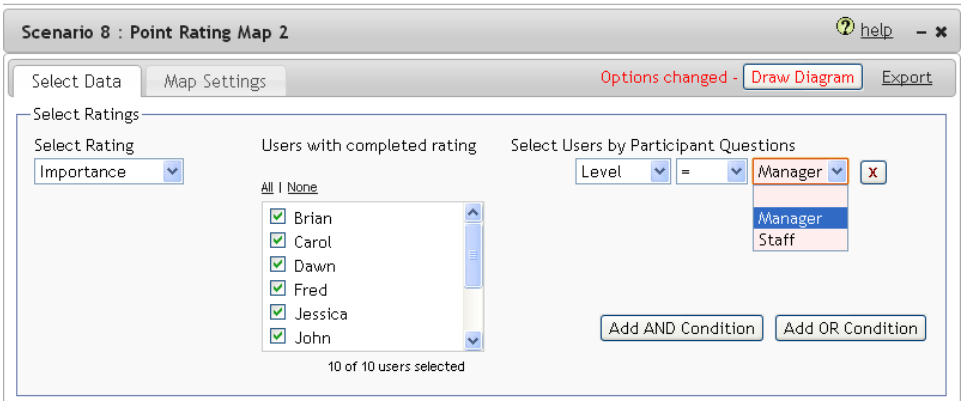


Figure 45: Point rating map selection criteria.

To create a point rating map, select the rating question from the dropdown box in the upper left corner of the window. Selecting the rating question will automatically populate the "Users with completed rating" list with the appropriate participants.

To select which participants' ratings to include, the Administrator may select all, deselect all, manually select users, or select users by participant questions.

To select participant ratings:

- To select participant individually: click the check box to the left of each participant's name.
- To select/deselect multiple participants anywhere in the list: uncheck each individual check box.
- To select or deselect all participants: click on the 'All' or 'None' buttons above the listing of participants with Approved Ratings.
- To select ratings by Participant Questions:

    1. Click the "Add Condition" Button.
    2. In the Red Dropdown menu, select the appropriate participant question.
    3. Select an operator (=, <, >, etc.) from the middle select box.
    4. Enter search value:

        • If the variable is Continuous (i.e., shoe size), select a response value from the third dropdown box.

        • If the variable is Categorical (i.e., Employment level), select a value from the box on the right.

To select participants based on two demographic variables or conditions:

1. Enter Condition 1 as explained above.
2. Click the "Add AND Condition" or "Add OR Condition" buttons and repeat the steps above to add additional conditions.
    - To select participants whose demographic information meets the first and second conditions select the AND option.
    - To select participants that meet one condition or the other, select the OR option.
3. Enter Condition 2 in the same way as Condition 1.
4. Once all Participant Question variables have been entered, click the "Draw Diagram" button to draw the map on the selected data.

To delete a condition, click the red 'X' next to the condition.

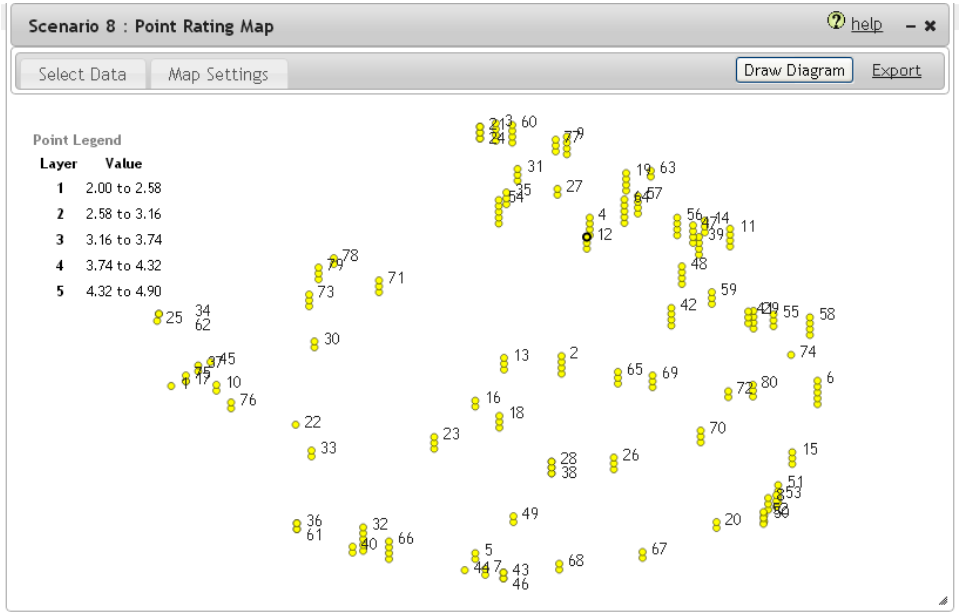


Figure 46: Example of a point rating map.

Cluster Maps

Cluster maps show how statements were grouped by the hierarchical cluster analysis. Administrators have the option of changing the number of clusters for maps. Exploring and becoming familiar with the maps will help determine the number of clusters that best represents the concept map.

General Interactive Features

Hover over a statement point to view the statement text.

Left-clicking on a point displays the "Point Details" window, which includes statement text, a list of closest statements, and the option to conduct a spanning analysis.

A spanning analysis shows how frequently a statement on the map has been sorted with every other statement.

The Point Details window also includes the ability to redraw a cluster boundary to include a statement that was previously in an adjacent cluster.

Left clicking on a cluster displays the "Cluster Details" window, which includes the 10 best category labels and a listing of the statements in the cluster.

To edit a cluster label, type the new label in the text box at the top of the cluster details window and click "Update."

The Map Settings Tab options include:

- Show points
- Show statement numbers
- Show colored clusters
- Show cluster numbers
- Show cluster labels
- Smooth cluster shape (Smooth, Smoother, Smoothest)

Cluster Replay Map

The initial cluster replay map displays a ten cluster solution, and is set to loop from ten to five clusters if the "Loop" button is pressed. The looping animation will continue until paused by pressing the loop button. The Administrator can view different cluster solutions by moving the red indicators on the number line below the map. When the map is not looping, use the left and right arrows to change the displayed number of clusters on the map.

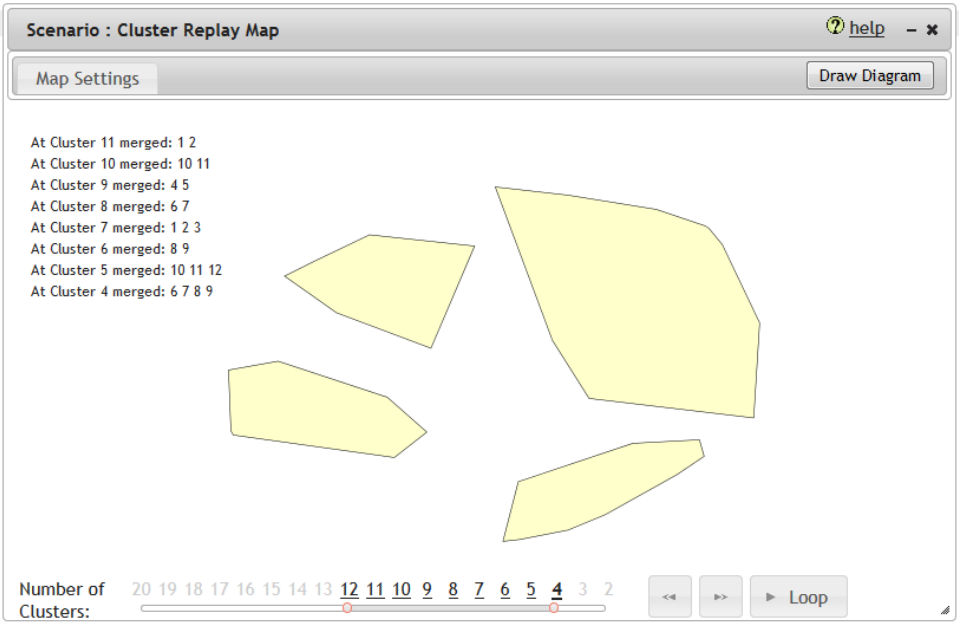


Figure 47: Example of a cluster replay map, showing cluster mergers from 12 to four.

Cluster Map

After examining possible cluster solutions via the cluster replay map, the Project Administrator will come to a conclusion about the best number of clusters to represent the content of the map statements. The number of clusters must be selected in order to create a cluster map. Having a saved cluster map will enable the production of other maps and outputs, such as pattern matches and go-zones.

In the Map Settings Tab, the title of the map can be edited. Click “Rename” to update the map title.

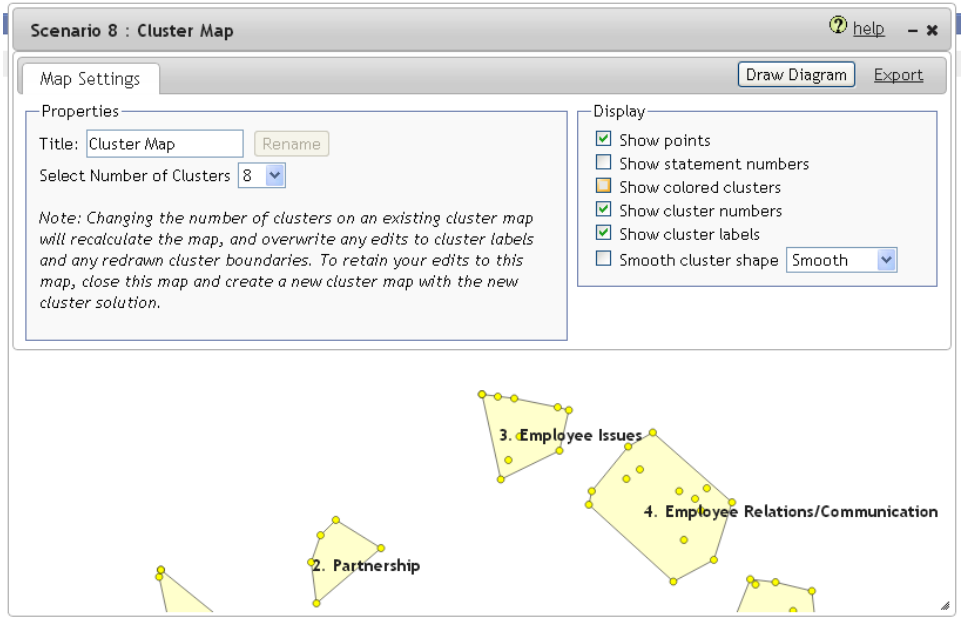


Figure 48: Example of an 8 cluster map selection.

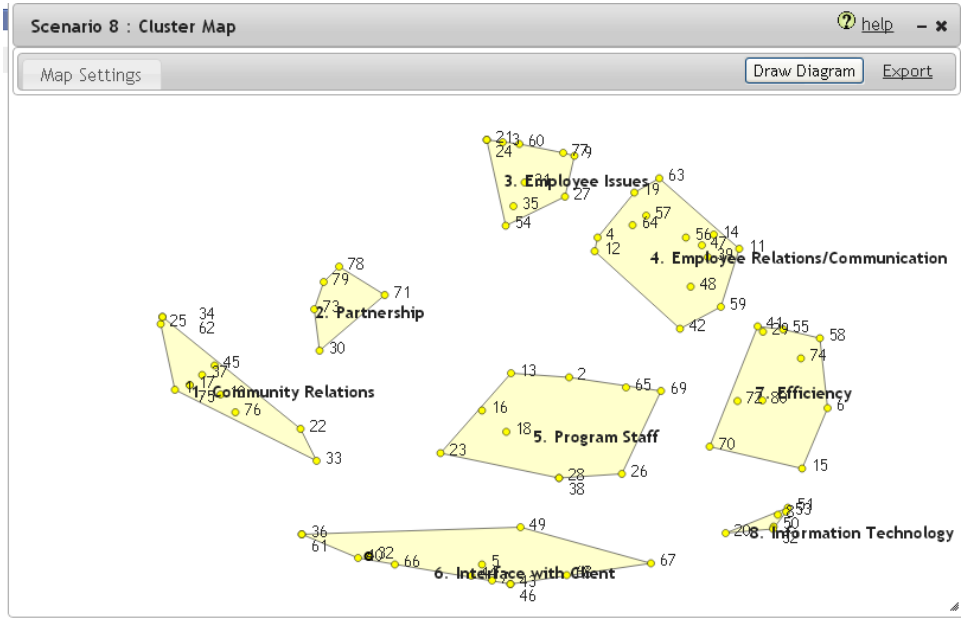


Figure 49: Example of an 8 cluster map, with points and statement numbers.

Cluster Rating and Bridging Maps

A cluster rating map shows how the statements were grouped by the cluster analysis, with the average cluster ratings overlaid. Similarly, a cluster bridging map shows how the statements were grouped by the cluster analysis, with the average cluster bridging values overlaid.

To create a cluster rating map, select the rating question from the dropdown box in the upper left corner of the window. Selecting the rating question will automatically populate the "Users with completed rating" list with the appropriate participants.

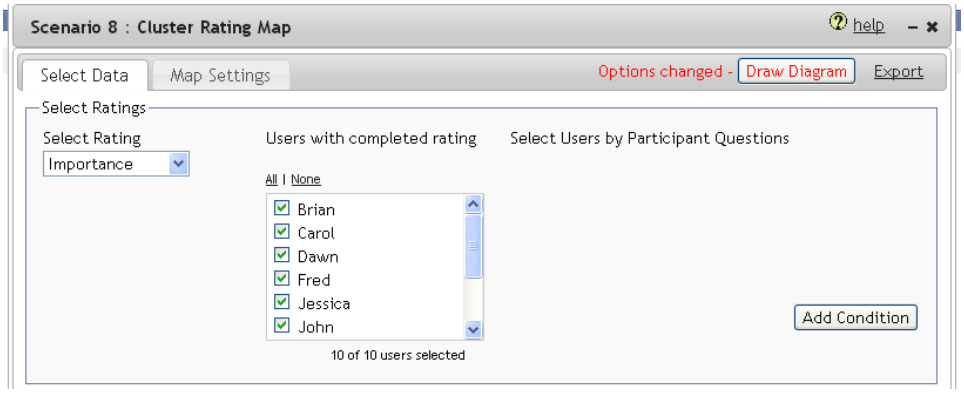


Figure 50: Create Cluster Rating Map screen, with rating and users selected.

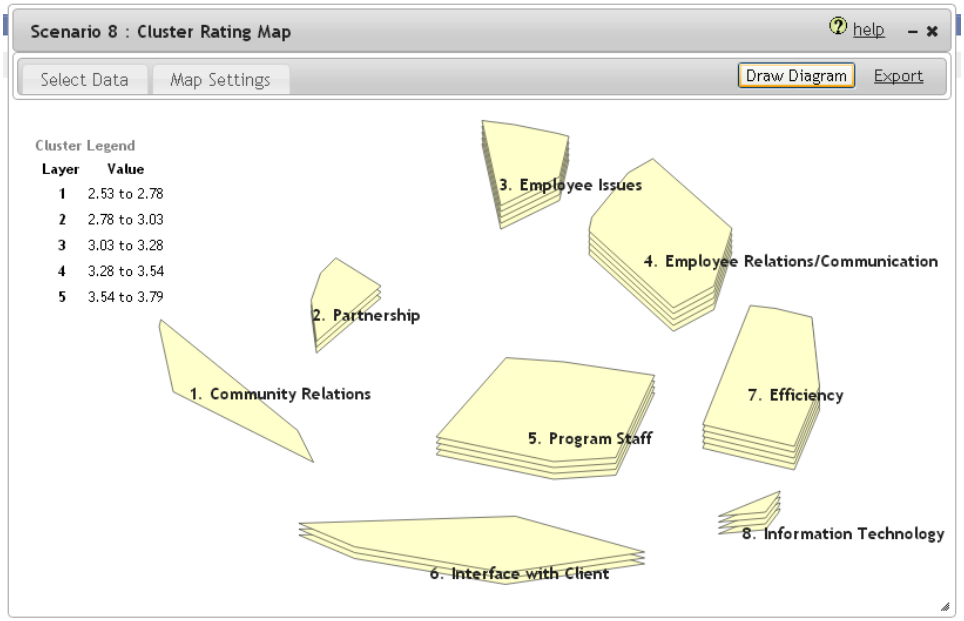


Figure 51: Example of a cluster rating map.

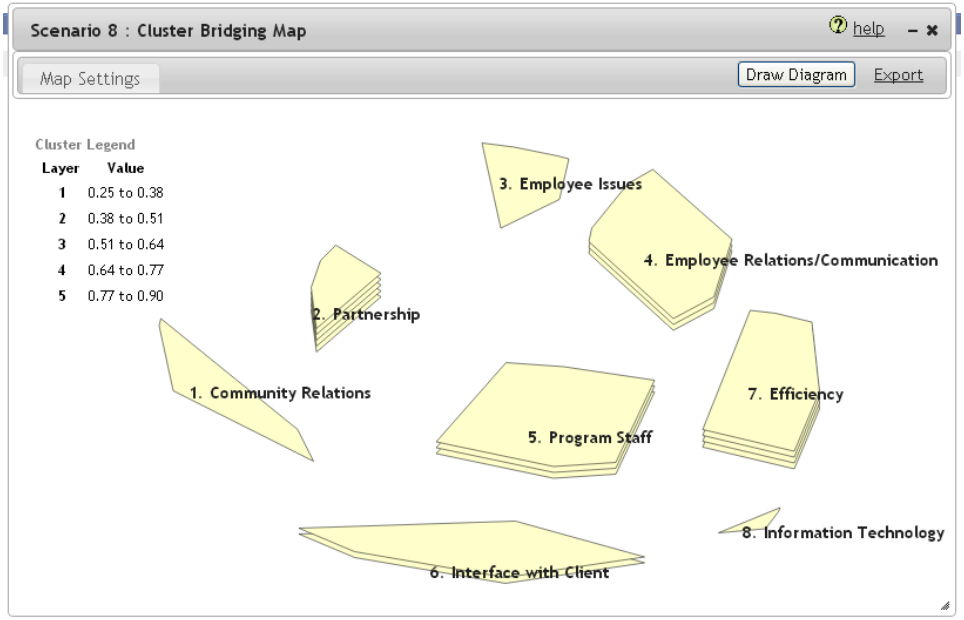


Figure 52: Example of a cluster bridging map.

Interact with Maps

Within each map screen, there are several options for interacting with the map to maximize the information shown, re-format the image, and export the data to another program.

Each general map screen includes three options:

- Map Settings (Map Settings): The options for interacting with a map will vary in this section based on the type of map being produced. Some common options are described below.
- Draw Diagram (Draw Diagram): Redraws the diagram with the current selected settings, and minimizes the Map Settings tab to display the full map on the screen.

- Export (Export): Exports the diagram as an .EMF file (for use in PowerPoint).

In addition to these general options, scrolling and clicking directly on the map will also enable certain features. A few of these features are highlighted below:

In any map with points displayed, left-clicking the top point of a stack brings up the "Point Details" window, displaying the statement text, a list of closest statements, and a check box to conduct a spanning analysis from this point. A spanning analysis shows how frequently points on the map have been sorted together. To turn on the spanning analysis, place a check mark in the box. To deactivate the spanning analysis, uncheck the box.

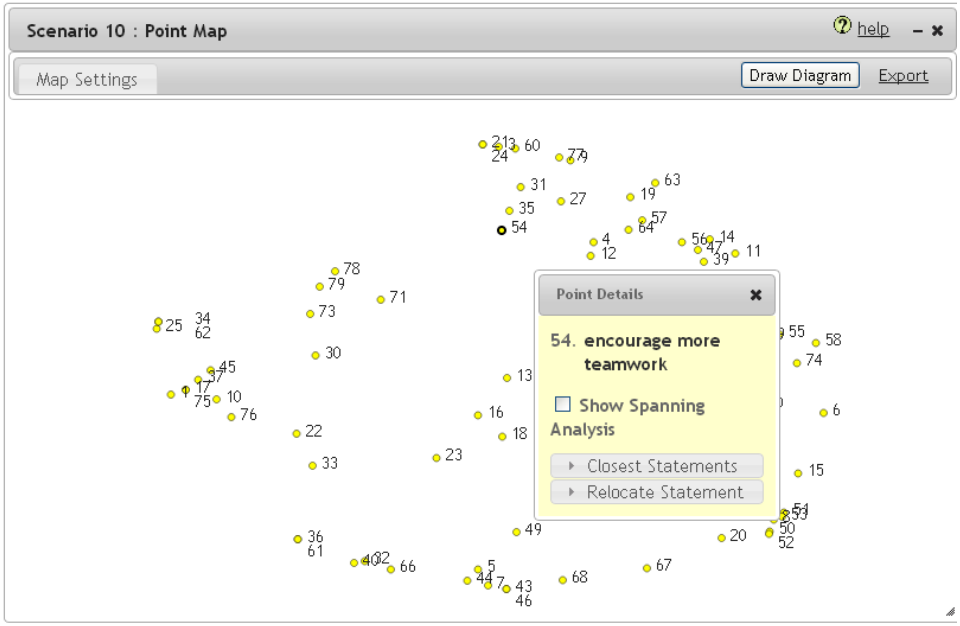


Figure 53: Example of a point details window on a point map.

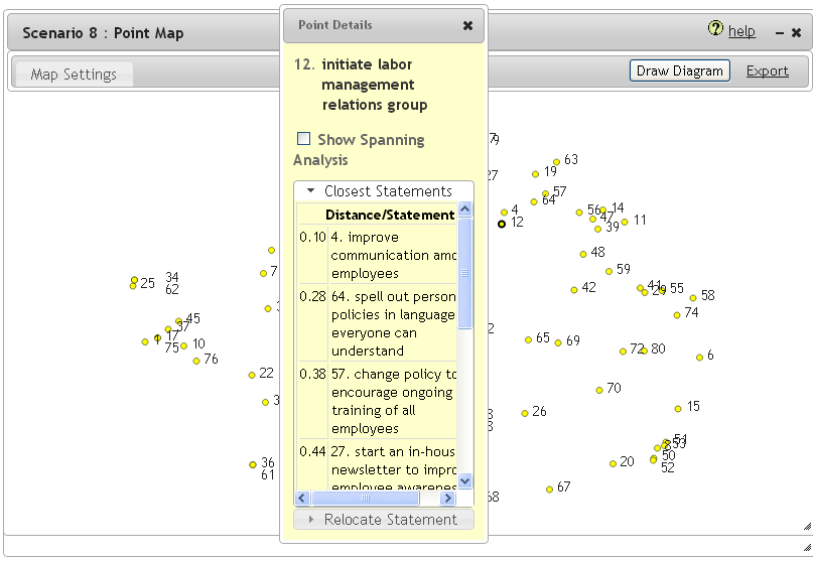


Figure 54: Example of 'show closest statements' feature on a point map.

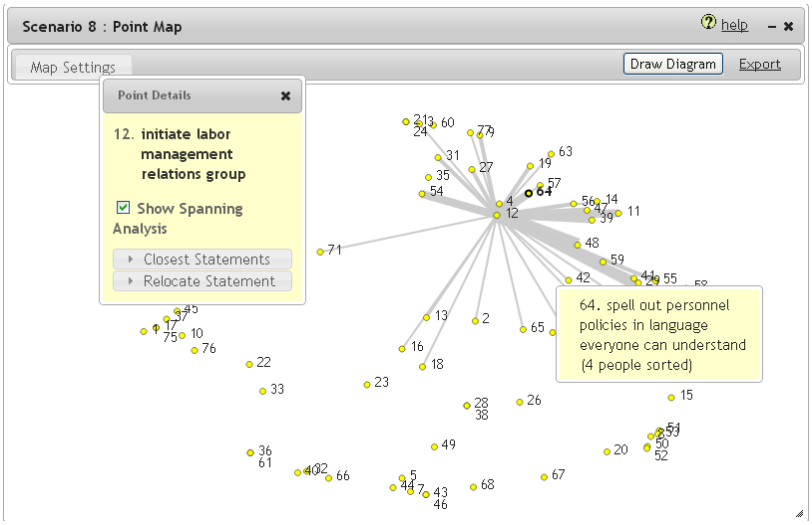


Figure 55: Example of spanning analysis on a point map.

In a cluster map, left-clicking on a cluster brings up the “Cluster Details” window, displaying the cluster name top ten category labels, and statements within cluster.

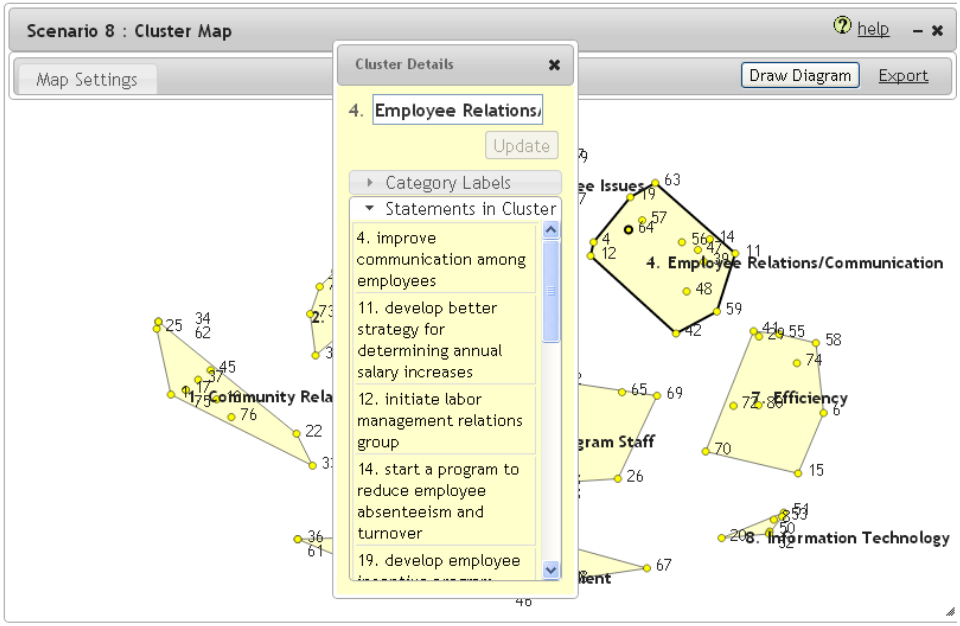


Figure 56: Example of ‘show statements in cluster’ view.

There may be times when the program is not selecting cluster labels that you feel are appropriate, or the best fit, for a particular cluster. These labels can be changed manually on a map by typing a new label into the Cluster Details window text box and clicking "Update."

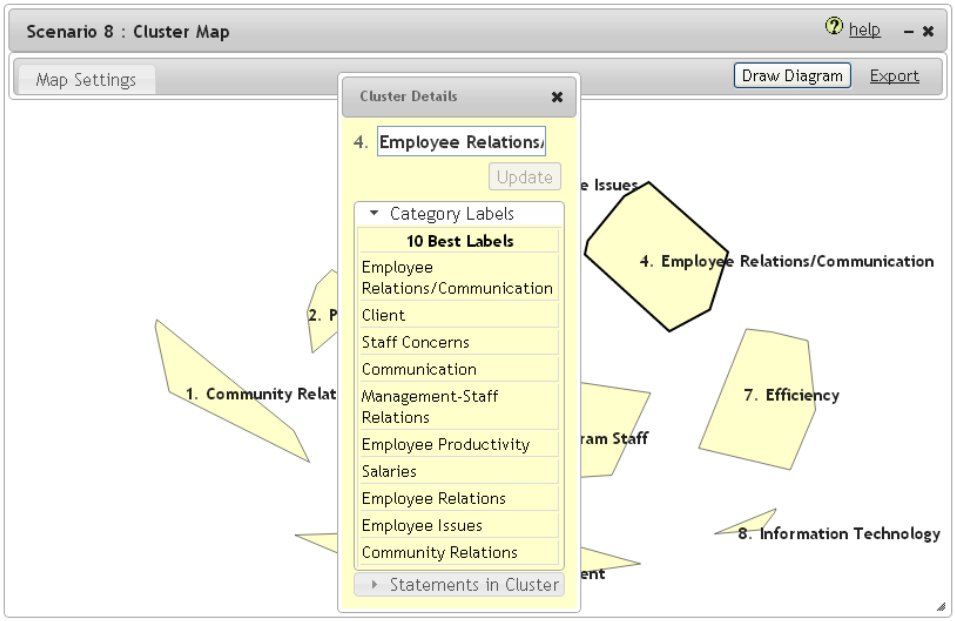


Figure 57: Example of category label/change label view.

When a statement on a map qualitatively seems to belong in a cluster adjacent to the one it is in, you can change its cluster by directly manipulating the data in the database. This does not actually move the location of the statement, but redraws the cluster boundaries to include the statement in a different cluster.

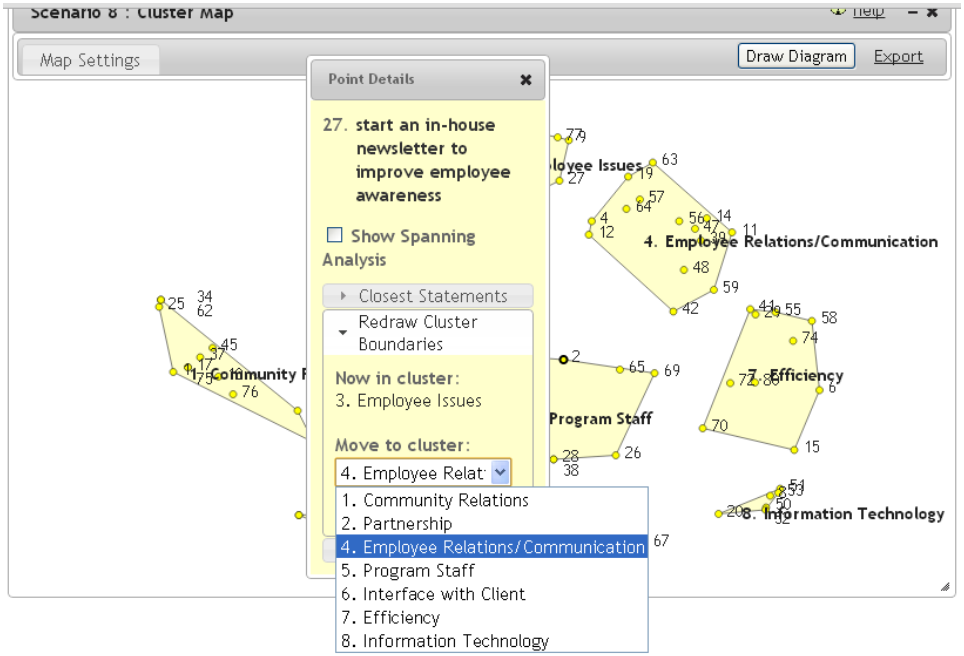


Figure 58: Process for redrawing a cluster boundary.

Produce Pattern Matches

Pattern matches are ladder graphs that display a comparison of average cluster ratings between two variables, such as stakeholder groups (identified by the participant questions) or rating variables.

Once a cluster map has been produced, the Administrator will be able to create pattern matches and go-zones based on the cluster and rating data. To access this area, select **Pattern Matches and Go-Zones** from the **Analysis** menu.

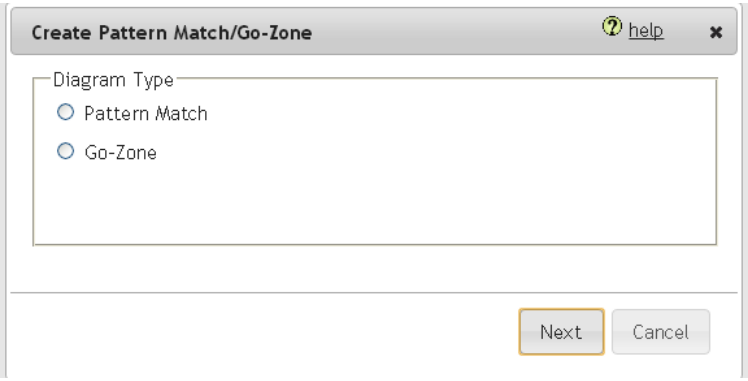


Figure 59: Create Pattern Match/Go-Zone screen.

Then choose “Pattern Match” from the above screen.

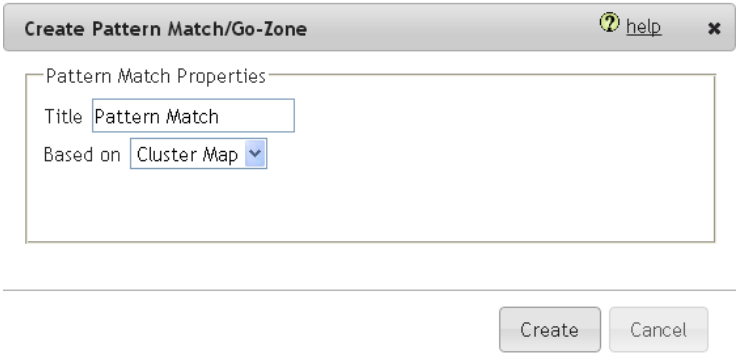


Figure 60: Create Pattern Match/Go-Zone screen, with pattern match based on cluster map selected.

On the following screen (shown above) the pattern match can be labeled and the appropriate cluster map selected to use as the basis for the pattern match.

Before drawing a pattern match, the Administrator will need to select the rating information to include on the left and right axes of the pattern match ladder and label each axis. Ratings and users must be selected separately for each axis. Required input is highlighted in red.

To create a Pattern Match, select the rating question from the dropdown box in the upper left corner of each side of the window for each axis. Selecting the rating question will automatically populate the “Select Users” list with the appropriate participants.

To select which participants’ ratings to include, either select all, deselect all, manually select users, or select users by participant questions.

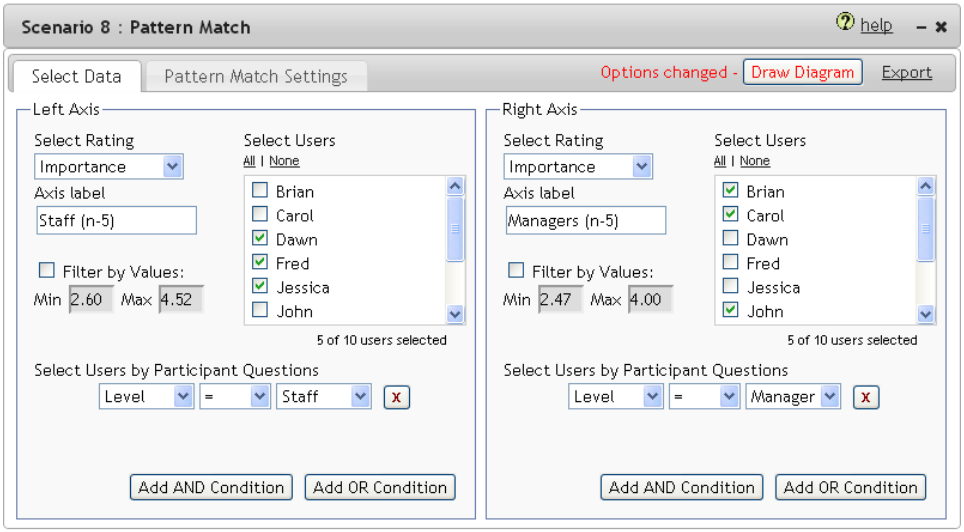


Figure 61: Pattern match selection screen.

To select participant ratings:

- To select participants individually: click the check box to the left of each participant's name.
- To select/deselect multiple participants anywhere in the list: uncheck each individual check box.
- To select or deselect all participants: click on the 'All' or 'None' buttons above the listing of participants with Approved Ratings.
- To select ratings by Participant Questions:

  1. Click the "Add Condition" Button.

  2. In the Red Dropdown menu, select the appropriate participant question.

  3. Select an operator (=, <, >, etc.) from the middle select box.

  4. Enter search value:

- If the variable is Continuous (i.e., shoe size), select a response value from the third dropdown box.
- If the variable is Categorical (i.e., Employment level), select a value from the box on the right.

To select participants based on two demographic variables or conditions:

1. Enter Condition 1 as explained above.
2. Click the "Add AND Condition" or "Add OR Condition" buttons and repeat the steps above to add additional conditions.
   - To select participants whose demographic information meets the first and second conditions select the AND option.
   - To select participants that meet one condition or the other, select the OR option.
3. Enter Condition 2 in the same way as Condition 1.
4. Once all Participant Question variables have been entered, click the "Draw Diagram" button to draw the map on the selected data.

To delete a condition, click the red 'X' next to the condition.

You can use the "Filter by Values" checkbox to define the Min and Max values of the pattern match to change the range that is displayed.

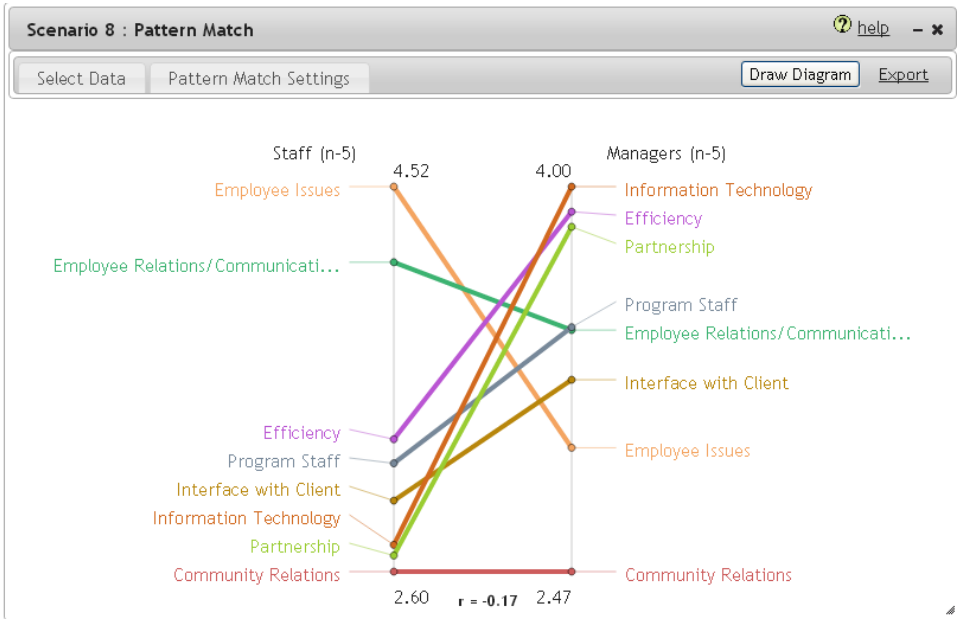


Figure 62: Example of a relative pattern match.

In the above example, the axis minimum and maximum are automatically set to the actual minimum and maximum average for the clusters on each side. This produces a *relative* pattern match. It is also possible to set the same minimum and maximum values for both sides of the ladder graph, within the "Select Data" screen. This produces an *absolute* pattern match.

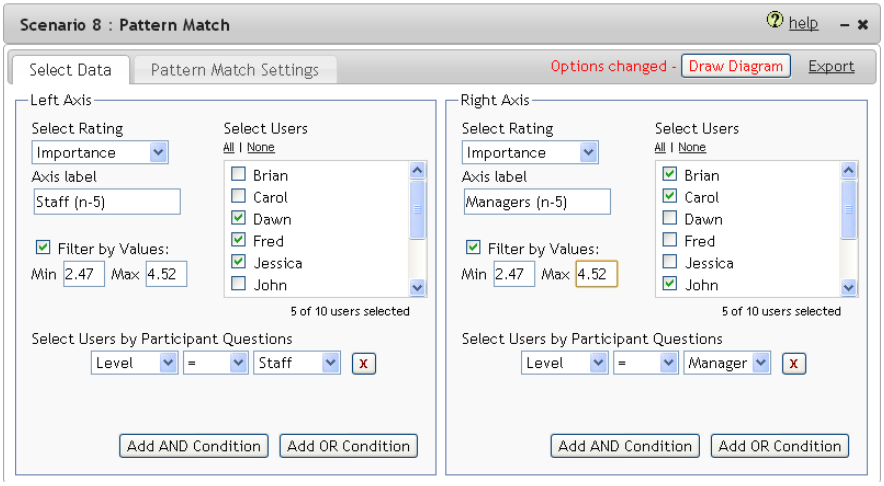


Figure 63: Pattern match selection screen with minimum and maximum values selected.

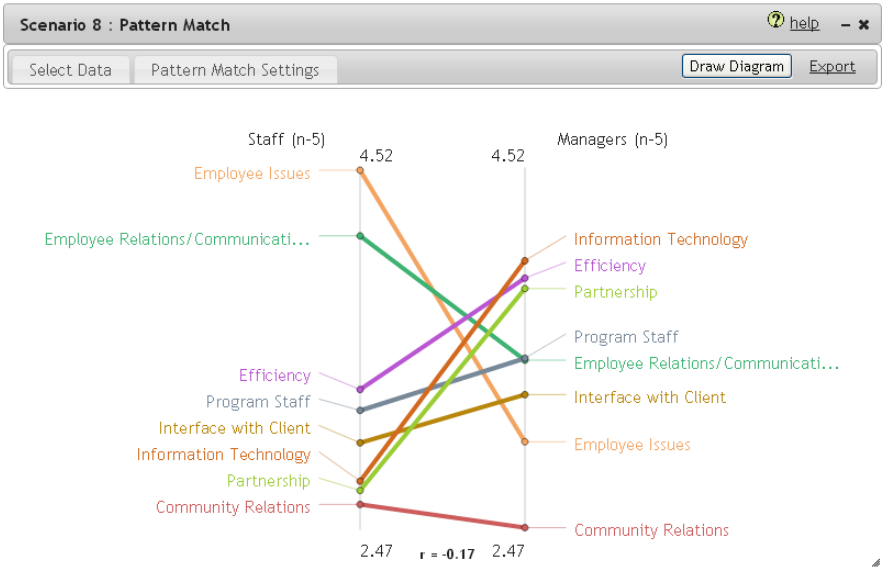


Figure 64: Example of an absolute pattern match.

In the Pattern Match Settings Tab, the title of the map can be edited. Click the "Rename" button to save a new map title.

The Pattern Match Settings Tab options also include:

- Show Correlation
- Show Axis Values

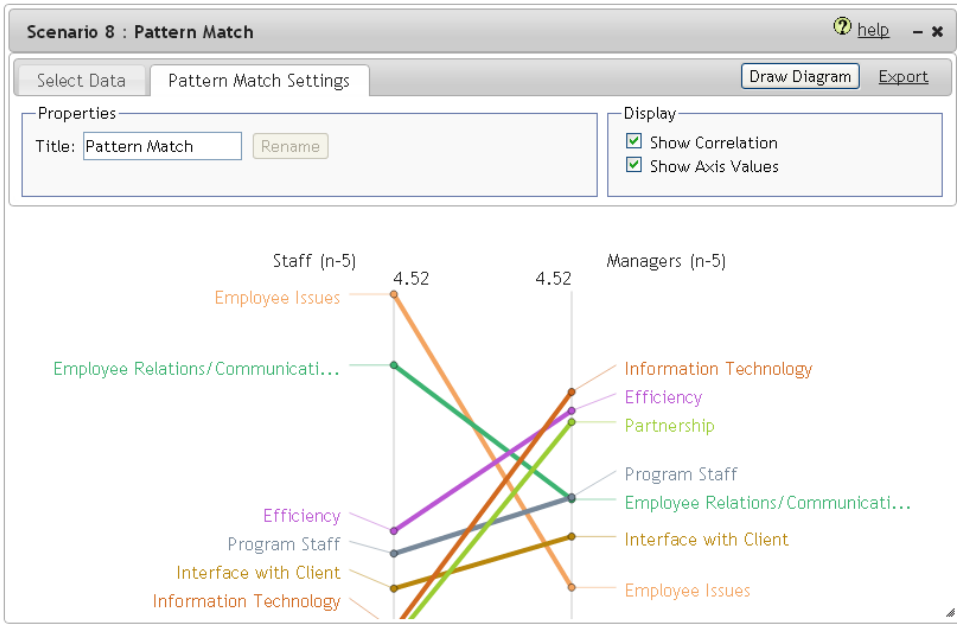


Figure 65: Example of the Pattern Match Settings tab.

Clicking the Draw Diagram button will redraw the diagram with the current selected settings, and minimize the Map Settings tab to display the full map on the screen.

Click "Export" to export the diagram as an .EMF file (for use in PowerPoint).

Produce Go-Zones

Go-Zones are bivariate scatter plots of the pattern match data, displayed on an X/Y graph divided into quadrants. They are especially useful for viewing the averages of statements within a cluster.

To access this area, select **Pattern Matches and Go-Zones** from the **Analysis** menu.

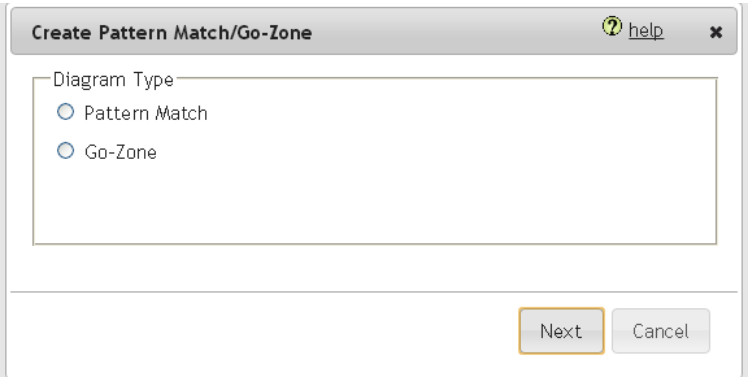


Figure 66: Create Pattern Match/Go-Zone screen.

Then choose "Go-Zone" from the *Properties* screen.

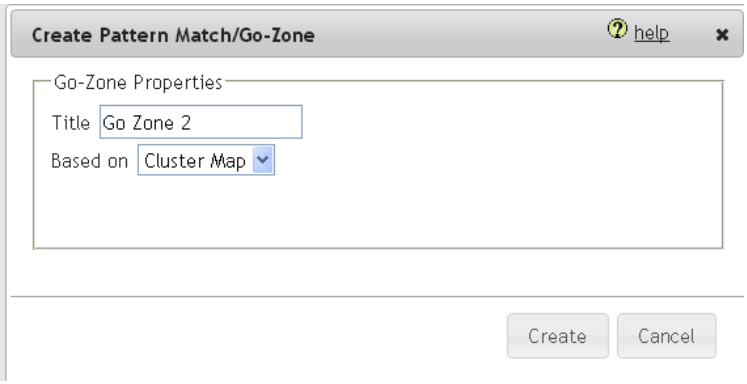


Figure 67: Create Pattern Match/Go-Zone screen, with go-zone based on cluster map selected.

On the following screen (shown above) the go-zone can be labeled and the appropriate cluster map selected to use as the basis for the go-zone.

Before drawing a go-zone, the Administrator will need to select the rating information to include on the horizontal and vertical axes of the go-zone and label each axis. Ratings and users must be selected separately for each axis. Required input is highlighted in red.

To create a go-zone, select the cluster to be displayed from the dropdown box in the upper left portion of the window. Selecting the rating question will automatically populate the "Select Users" list with the appropriate participants.

To select which participants' ratings to include, you can select all, deselect all, manually select users, or select users by participant questions.

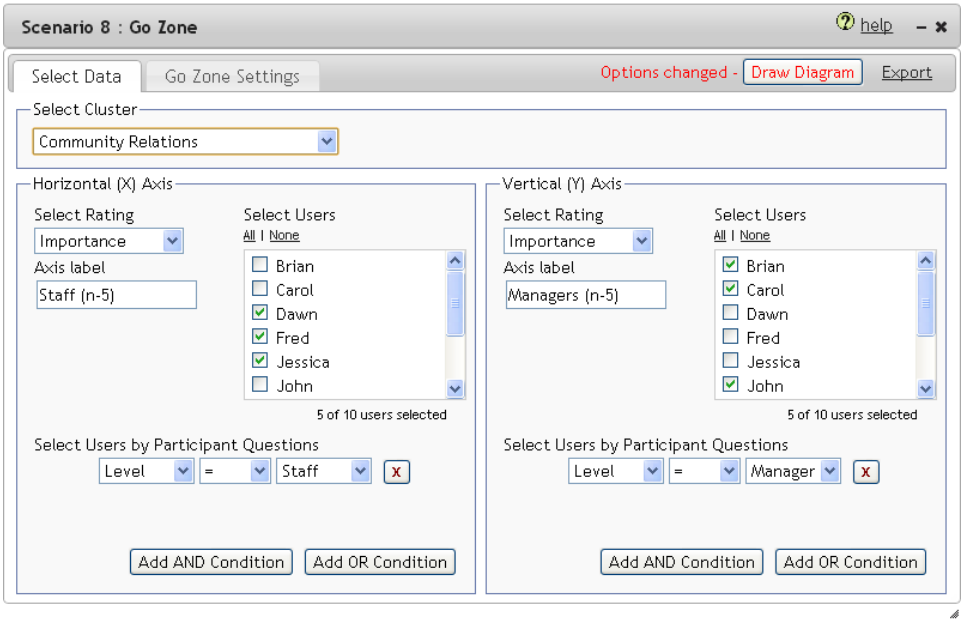


Figure 68: Go-Zone selection screen, with users and cluster selected.

To select participant ratings:

- To select participants individually: click the check box to the left of each participant's name.
- To select/deselect multiple participants anywhere in the list: uncheck each individual check box.
- To select or deselect all participants: click on the 'All' or 'None' buttons above the listing of participants with Approved Ratings.
- To select ratings by Participant Questions:

  1. Click the "Add Condition" Button.

  2. In the Red Dropdown menu, select the appropriate participant question.

  3. Select an operator (=, <, >, etc.) from the middle select box.

  4. Enter search value:

     • If the variable is Continuous (i.e., shoe size), select a response value from the third dropdown box.

     • If the variable is Categorical (i.e., Employment level), select a value from the box on the right.

To select participants based on two demographic variables or conditions:

5. Enter Condition 1 as explained above.
6. Click the "Add AND Condition" or "Add OR Condition" buttons and repeat the steps above to add additional conditions.

   • To select participants whose demographic information meets the first and second conditions select the AND option.

   • To select participants that meet one condition or the other, select the OR option.
7. Enter Condition 2 in the same way as Condition 1.
8. Once all Participant Question variables have been entered, click "Draw Diagram" to draw the map on the selected data.

To delete a condition, click the red 'X' next to the condition.

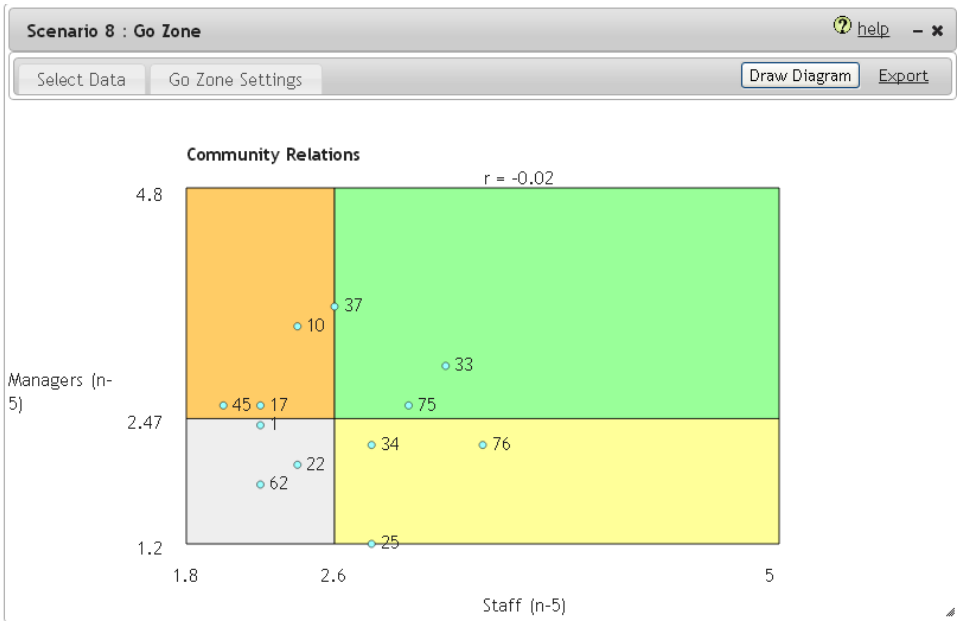


Figure 69: Example of a go-zone.

Hover over a statement point to view the statement text.

Left-clicking a point brings up the "Statement Details" window, displaying the statement text, the average ratings for each axis, and the statements in each zone.

In the Go-Zone Settings Tab, the title of the map can be edited. An edited map title automatically saves.

The Go-Zone Settings Tab options also include:

• Shade background

• Color statements by cluster

• Show zone dividers

• Show axis headings

• Show X/Y averages.

Clicking the Draw Diagram button will redraw the diagram with the current selected settings, and minimize the Map Settings tab to display the full map on the screen.

Click “Export” to export the diagram as an .EMF file (for use in PowerPoint).

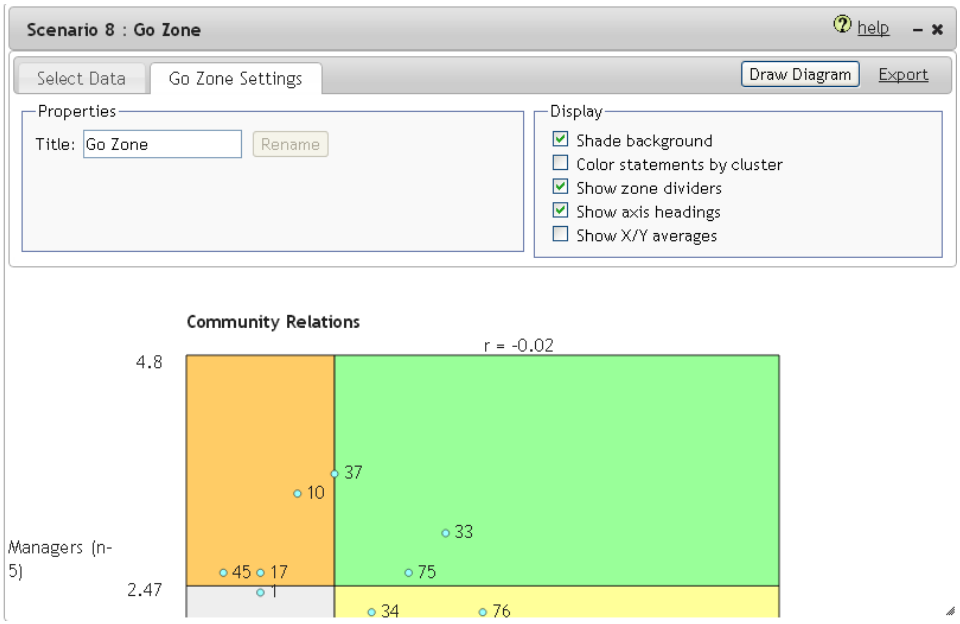


Figure 70: Go-Zone Settings screen.

REPORTS (Project Administrator Only)

This section describes the screens that create reports the Administrator can generate using the CS Global MAX™ application.

Reports Screen

The Reports screen allows the Administrator to generate any of several printer-friendly forms or reports from the project data, and/or export project data for use in other applications.

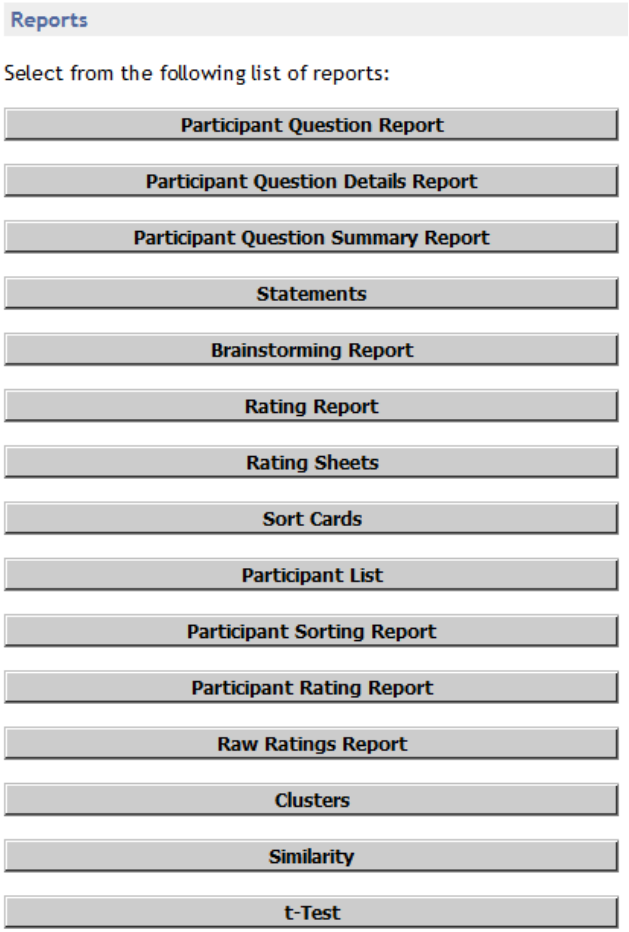


Figure 71: Example of the Reports screen.

Select one of the buttons shown on-screen to generate the corresponding report. Some of these reports reflect the work in setting up the project; others report on participant activities and their results.

For all reports, the following applies:

- the *Print-Friendly* button at the bottom of each screen will display the content in a left-justified format suitable for printing. Please note that the Similarity Matrix Report does not include a Print-Friendly button.
- the *Export Data* button will prompt the Administrator to open or save a file (.txt) or (.csv) of the report content,
- the *Return to Reports List* button, located at the bottom of each individual **Reports** screen, will return user to the original list.

Note: When data fields in a report setup are left blank, all information will be aggregated into the report.

Following are descriptions and examples of each type of report.

Participant Questions Report

This report lists details for each participant question specified for a project, including the question name and text, question type (continuous or categorical), and allowable response values or ranges.

Participant Questions Report

Participant Question 1

Name: Level
Question Text: What is your job role level?
Type: categorical
Choice 1: Manager
Choice 2: Staff

Participant Question 2

Name: Focus
Question Text: What is your job focus in the organization?
Type: categorical
Choice 1: Client Service
Choice 2: Administration

Participant Question 3

Name: Years
Question Text: How many years have you been with the organization?
Type: continuous
Minimum: 1
Maximum: 100000
Precision:

Return to Reports List | Print-Friendly | Export Data

Figure 72: Example of the Participant Questions Report.

Data fields include the following:

Name: A descriptive title assigned to this question.

Question Text: The text of the question, as seen by participants.

Type: Question type, set to either *Continuous* or *Categorical*.

Minimum and Maximum (continuous questions only): Minimum and maximum allowable response values.

Precision (continuous questions only): Optional number of decimal places allowed. This value is left blank or set to *zero* for whole numbers.

Choice (categorical questions only): Variables of individual choices for categorical questions.

Participant Questions Details Report

This report provides details of participant question responses, filtered by demographic name, assigned project phase(s), and response and completion status.

This report details participant question responses by participant assignment and participation status. The output of this report displays one participant per line, showing completion status, approval ("checked") status, and the participant's answer.

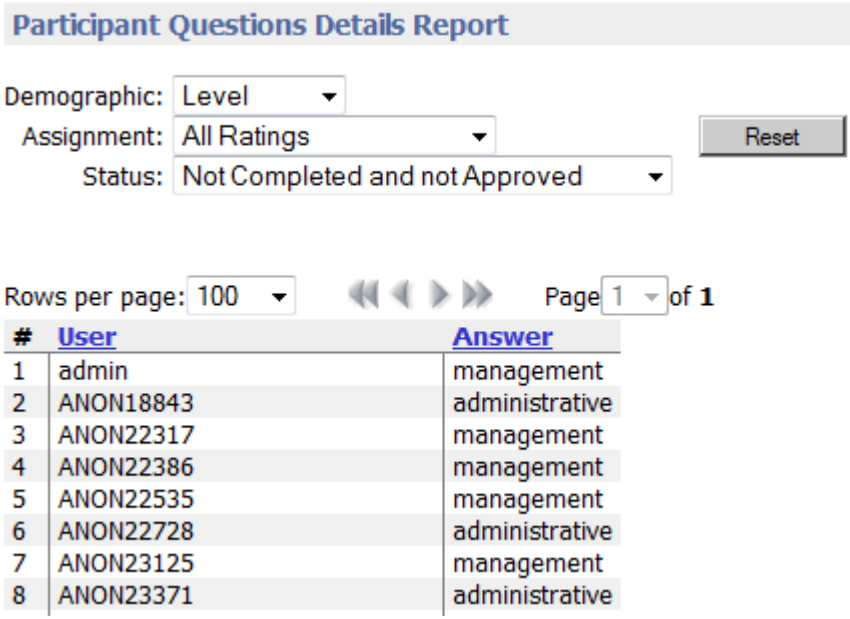


Figure 73: Example of the Participant Questions Details Report.

Options include:

Demographic: Select an existing question from the drop-down menu.

Assignment: An optional filter to select participants by project phase assignment. Choices include *Brainstorming, Sorting*, and *All Ratings*, *All Ratings and Sorting*, and each specified *Rating*.

Status: An optional filter to select participants by participation status. Choices include *Any Status*, *Not Completed and Not Approved*, *Not Completed but Approved Anyway*, *Completed but not Approved*, and *Completed and Approved*. An *"approved"* status indicates you have *"checked"* participant data for inclusion in analysis.

Use the *Reset* button to revert to default options, which will display all demographics and all participants regardless of assignment or status.

Participant Questions Summary Report

This report summarizes and optionally creates graphs of participant responses, filtered by question name, assigned project phase, and participation status.

Participant Questions Summary Report

Participant Question: -- Select --
Assignment: -- Select --
Completion Status: -- Select --
Checked Status: -- Select --
Reset
Responses: ☐ Hide *did not respond* totals ☐ Hide rows with no responses
Types: ◉ any ○ categorical ○ continuous
Graph Options: ☐ Add Charts

Participant Question	Option or Statistic	Frequency	%
Level	Manager	6	46.15%
	Staff	5	38.46%
	did not respond	2	15.38%
		13	**100.00%**
Focus	Client Service	7	53.85%
	Administration	4	30.77%
	did not respond	2	15.38%
		13	**100.00%**

Years		
	Minimum:	
	Maximum:	
	Count:	0
	Low:	
	High:	
	Median:	
	Mode:	
	Average:	
	Std. Dev.:	
	did not respond:	13

Return to Reports List Print-Friendly Export Data

Figure 74: Example of the Participant Questions Summary Report.

Options include:

Participant Question: Select an existing question from the drop-down menu. All questions will be summarized if this field is left blank.

Assignment: An optional filter to select participants by assigned project phase. Choices include *Brainstorming, Sorting, All Ratings, All Ratings and Sorting,* and each specified Rating.

Completion Status: An optional filter describing the status of participant responses to the selected participant question. Choices include *Not Completed* and *Completed*.

Checked Status: An optional filter describing participation status for each assigned activity. Choices include *Not Checked* and *Checked*.

Responses: Select whether to include *Did Not Respond* totals or *Rows With No Responses*.

Types: Select participant question answer format to include in report, from *Any, Categorical*, or *Continuous*.

Graph Options: Check *Add Charts* to produce graphs of the summary output. If this option is selected, additional options include *Hide Pile Labels*, *Hide Bar Chart Labels* and *Hide Values*.

Use the *Reset* button to revert to default options, which will summarize all responses.

Statements

The statement report generates and/or exports an ordered and numbered list of brainstormed statements.

Statement List

#	Statement
1.	hold introduction seminars for brainstorming
2.	conducting needs assessment and program evaluation for improvement
3.	drop box for gathering customer opinion that can be implemented
4.	hold weekly brainstorming sessions with program management teams
5.	establish a 'quality circle' team approach for program employees
6.	purchase more state-of-the-art equipment
7.	develop better processes for involving people across departments/functions
8.	develop a consistent user interface for all computer databases
9.	investigate potential safety issues in the workplace
10.	close facilities that are too old or are underutilized
11.	examine managed care health plans as an alternative to current health insurance
12.	decrease client waiting time
13.	coordinate the facilities' color schemes
14.	improve the technology to allow high quality in house publications
15.	devise a team-based productivity incentive system for program teams
16.	find out what our other similar programs are planning to do in our area
17.	reduce middle management -- make organizational structure more horizontal
18.	sponsor local arts and cultural events to improve organization's image
19.	change policy to encourage ongoing training of all employees
20.	improve client satisfaction
21.	improve employee benefits package
22.	computerize all phases of the program management system
23.	friendlier program managers
24.	develop an employee evaluation process for all levels of staff
25.	develop better strategy for determining annual salary increases

Figure 75: Example of the Statements Report.

Brainstorming Report

This report displays brainstorming participation data, or statement entries, over a specified time interval.

Note: This report is only useful for the duration of the open brainstorming activity, before the Administrator exports the statement set to conduct idea synthesis.

Once the final statement set is imported into the system (for subsequent sorting and rating), the finalized statement set replaces the previous, original participant brainstorming activity.

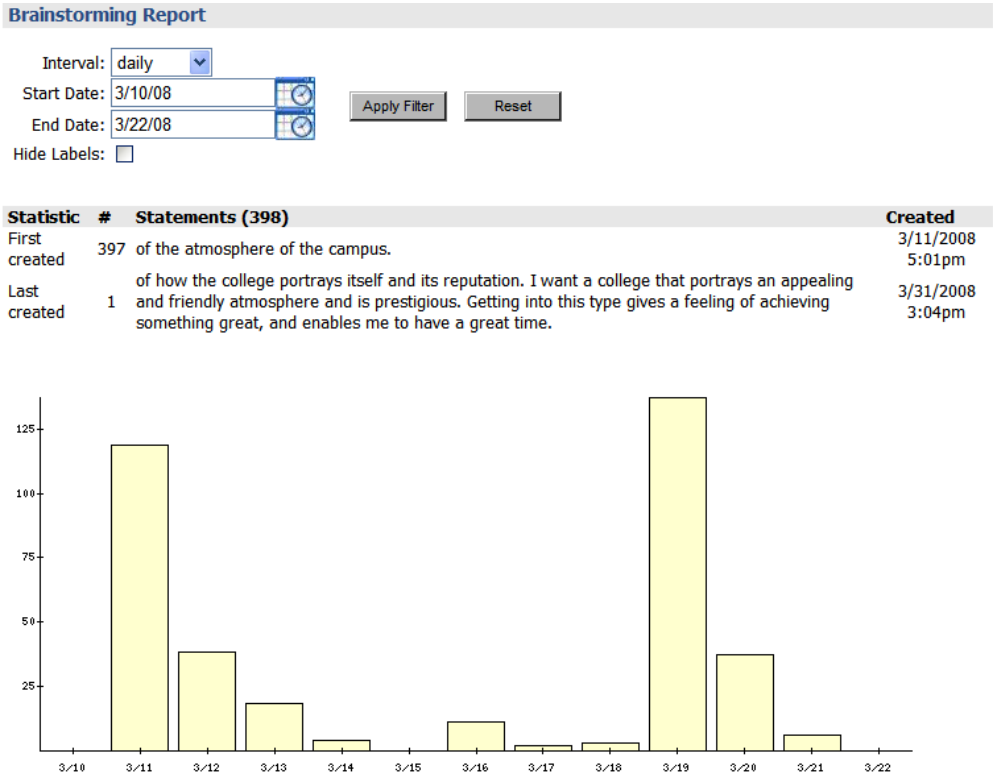


Figure 76: Example of the Brainstorming Report.

The intervals are displayed in a bar chart, with the vertical axis indicating the number statements created, and the horizontal axis displaying the units within the time interval specified (month(s), day(s), and perhaps time(s)).

The unit frequency displayed depends on the length of the time interval; the longer the time interval, the more units displayed, and vice-versa.

Above the bar chart is a section displaying brainstorming and statement statistics for the specified time interval. Data includes: *First Created, Last Created, Statement* (with total numbers in parentheses), and *Created* (date and time).

Note: One way to utilize this report is to track participant responsiveness to activity reminders.

You may ask, for example, did participation increase the day(s) following my brainstorming reminder? If so, you may observe peaks on those dates, as shown in the bar chart above.

Customizable fields include:

Interval: Specify the brainstorming time period to show in the report. Variables include *hourly, 2 hours, 4 hours, 8 hour, 12 hours, and daily*.

Start Date: Specify the day, month, and year for the start of the interval. You may also click on the monthly calendar icon ( ) to choose this date.

End Date: Specify the day, month, and year for the end of the interval. You may also click on the monthly calendar icon ( ) to choose this date.

The *Hide Labels* box can be checked to hide time interval units on the horizontal axis.

Use the *Apply Filter* button to engage the time interval you selected and display that data in the bar chart.

Rating Report

This report lists details for each rating specified for a project, including the rating name, abbreviation, instruction, rating type and allowable response values or ranges.

Rating Report

Rating 1

Name:	Importance
Abbreviation:	Importance
Instruction:	Rate each statement on a 1-to-5 scale where: 1=relatively unimportant; 2=somewhat important; 3=moderately important; 4=very important; 5=extremely important.
Type:	
Minimum:	1
Minimum Label:	Relatively Unimportant
Maximum:	5
Maximum Label:	Extremely Important

Rating 2

Name:	Needs Assessment
Abbreviation:	Needs
Instruction:	Rate this 1=Yes if you think your office should be responsible for the needs assessment on this item; rate 0=No if you don't.
Type:	
Minimum:	0
Minimum Label:	No
Maximum:	1
Maximum Label:	Yes

Return to Reports List | Print-Friendly | Export Data

Figure 77: Example of the Rating Report.

Data includes the following:

Name: A descriptive title assigned to this rating, displayed in the rating list.

Abbreviation: Rating name displayed in participant menus.

Instruction: Rating scale text used as instructions in participant rating screens.

Type: Data entry type. Choices include radio buttons, numerical entry, or drop-down menus.

Values/Ranges: Allowable values, listed as choices or minimum/maximum values and labels.

Rating Sheets

This report generates a hardcopy rating sheet for a single specified rating, for use in paper-based participant rating of all statements.

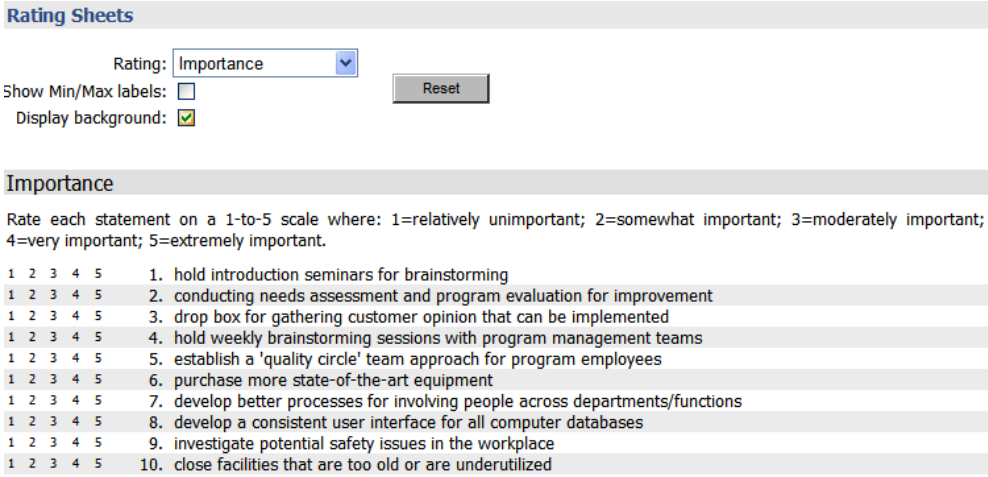


Figure 78: Example of the Rating Sheets Report.

Options include:

Rating: Select a rating from the drop-down menu. The selected rating scale will appear to the left of each statement.

Show Min/Max labels: Controls whether labels for minimum and maximum range values are shown on the report. Consider using this option when rating scale values alone are not self-explanatory.

Display background: This option displays a shaded background behind every other statement to enhance readability.

Use the *Reset* button to revert to default settings, which clears the selected rating options.

Sort Cards

This report exports statements as an Adobe Acrobat® Portable Document (PDF) file in a variety of sizes and formats, so that they can be printed for participant use in paper-based statement sorting.

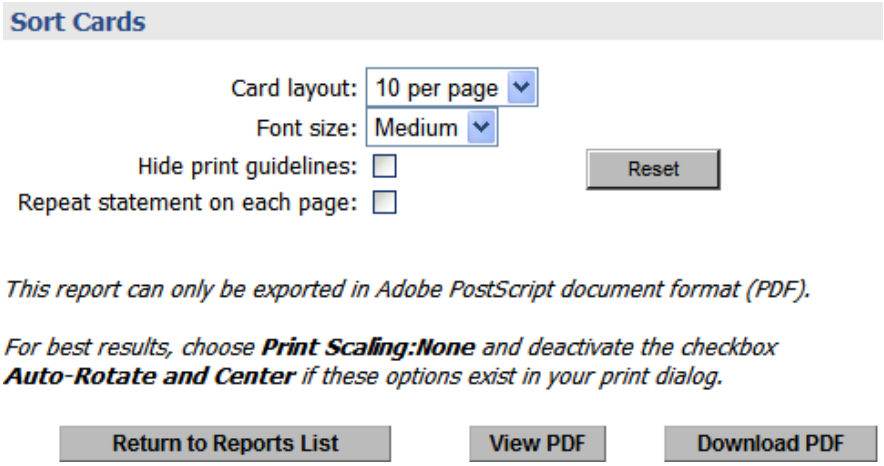


Figure 79: Example of the Sort Cards Report.

Options include:

Card layout: Select 1, 2, 4, 6, 8, 10 or 12 statements printed per 8 ½ x 11" page.

Font size: Select a small, medium, or large display font size.

Hide print guidelines: By default, card boundaries are displayed on the resulting PDF file, for ease in cutting the sheets into individual sort cards. This check box turns this feature off.

Repeat statement on each page: This option will display the same statement on each page, repeated for the number of cards specified above in the Card layout option. (For example, with 80 statements, and 10 cards per page specified, this option will produce 10 copies of each statement on each page for a total of 80 pages.) This option can help ease the process of collating statement cards into participant sorting decks. The default setting

prints each statement sequentially, so statements 1 – 10 would be on the first sheet.

Use the *Reset* button to revert to default options, which display 10 statements per page in medium font, and deselects all other options mentioned above.

Participant List

The Participant List Report generates and/or exports a list of participants, with a selected level of associated participant data.

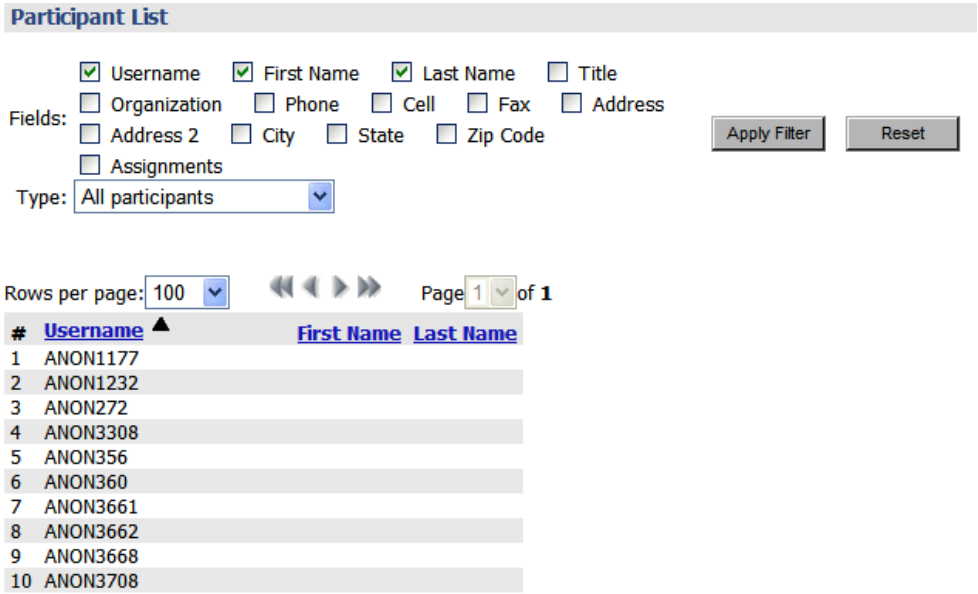


Figure 80: Example of the Participant List Report.

Options include:

Fields: Check or uncheck options to display the participant *Username, First Name, Last Name, Title, Organization, Phone Number, Cellular Phone Number, Fax Number, Address Fields,* or *Assignments*. Use the *Apply Filter* button to save these options.

Type: Select to display *All Participants, Skip Anonymous Participants,* or *Display Only Anonymous* participants.

Rows per page: Select the number of lines to be displayed per page. Options include *10, 25, 50, 100*, or *200* lines per page.

Page: Using the arrows above the participant list, select which page of results to display from the drop-down menu.

Use the *Reset* button to revert to the default values, which will display the *Username, First Name* and *Last Nam*e, for all participants.

Participant Sorting Report

This report displays a list of sorting data filtered by participant type and participation status. For each participant, the report displays participant username, sorting categories, and the respective grouped statements.

Participant Sorting Report

Type: All participants

Status: Completed

Reset

Show Unsorted: ☐

User 1:	ANON8231
Category 1:	**Client Focus**
70	look for ways to reduce fees in order to increase program attendance
64	conduct ongoing client focus groups to assure continuous feedback
53	establish a client satisfaction/complaints telephone hotline
31	find ways to make our programs more appealing to the key client groups
1	conducting needs assessment and program evaluation for improvement
11	decrease client waiting time
19	improve client satisfaction
28	perform regular client satisfaction surveys
32	take a "total quality service" approach to working with the client
Category 2:	**education**
68	rewrite program documentation/instructions to improve clarity and readability
66	improve new employee orientation and training
46	improve and expand in-house inservice training opportunities
0	hold introduction seminars for brainstorming
4	establish a 'quality circle' team approach for program employees
35	move toward becoming a "learning organization"
72	train management in not-for-profit management methods
60	improve program information and materials
Category 3:	**Engagement**
81	look for small organizations we might partner with
71	develop a unified program logo and look
63	advertise the organization's image rather than just specific programs

Figure 81: Example of the Participant Sorting Report.

Options include:

Type: Select which participants to include in the report. Options include *All Participants, Skip Anonymous* and *Display Only Anonymous.*

Status: Filter participants by participation status. Options include *All Assigned, Completed,* and *Completed and Approved.*

Show unsorted: This option will display statements that were not sorted by participants in an "*Unsorted*" category. Use the *Reset* button to revert to default values, which displays all participants and each of their respective sorts.

Participant Rating Report

This report displays a list of rating responses by participant type and participation status for each statement.

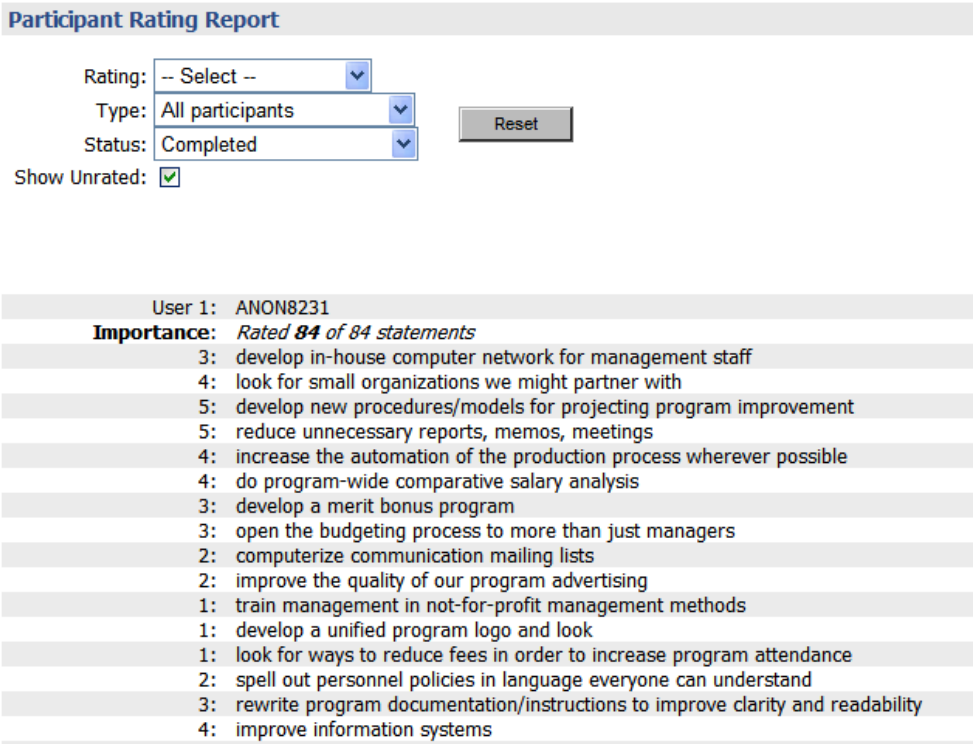


Figure 82: Example of the Participant Rating Report.

Options include:

Rating: An optional filter to select a rating from the drop-down menu.

Type: Select which participants to include in the report. Options include *All Participants, Skip Anonymous,* and *Display Only Anonymous.*

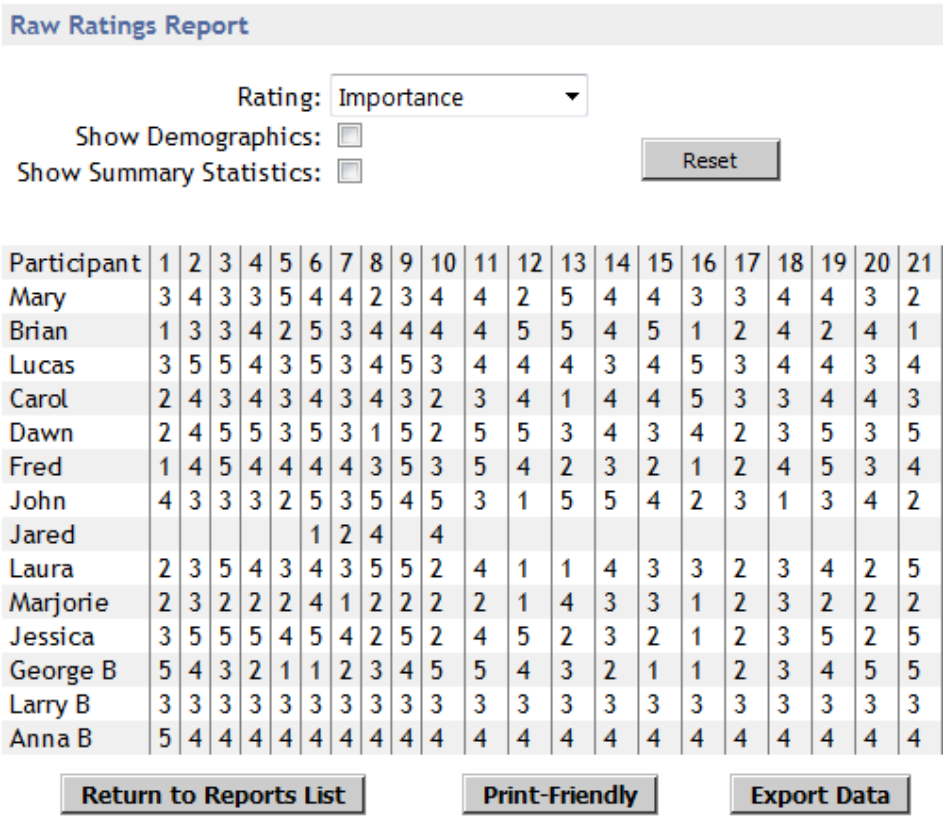
Status: Filter participants by assignment and participation status. Options include *All Assigned, Completed,* and *Completed and Approved.*

Show unrated: This option will display statements that were not rated by participants in an "*Unrated*" category.

Use the *Reset* button to revert to default values, which display all ratings scales and responses for all participants.

Raw Ratings Report

This report lists the rating data for all participants in a spreadsheet format. There are options to display participant responses to participant questions and show additional statistics from the data.



Participant	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21
Mary	3	4	3	3	5	4	4	2	3	4	4	2	5	4	4	3	3	4	4	3	2
Brian	1	3	3	4	2	5	3	4	4	4	4	5	5	4	5	1	2	4	2	4	1
Lucas	3	5	5	4	3	5	3	4	5	3	4	4	4	3	4	5	3	4	4	3	4
Carol	2	4	3	4	3	4	3	4	3	2	3	4	1	4	4	5	3	3	4	4	3
Dawn	2	4	5	5	3	5	3	1	5	2	5	5	3	4	3	4	2	3	5	3	5
Fred	1	4	5	4	4	4	4	3	5	3	5	4	2	3	2	1	2	4	5	3	4
John	4	3	3	3	2	5	3	5	4	5	3	1	5	5	4	2	3	1	3	4	2
Jared						1	2	4		4											
Laura	2	3	5	4	3	4	3	5	5	2	4	1	1	4	3	3	2	3	4	2	5
Marjorie	2	3	2	2	2	4	1	2	2	2	2	1	4	3	3	1	2	3	2	2	2
Jessica	3	5	5	5	4	5	4	2	5	2	4	5	2	3	2	1	2	3	5	2	5
George B	5	4	3	2	1	1	2	3	4	5	5	4	3	2	1	1	2	3	4	5	5
Larry B	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Anna B	5	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4	4

Example of the Raw Ratings Report.

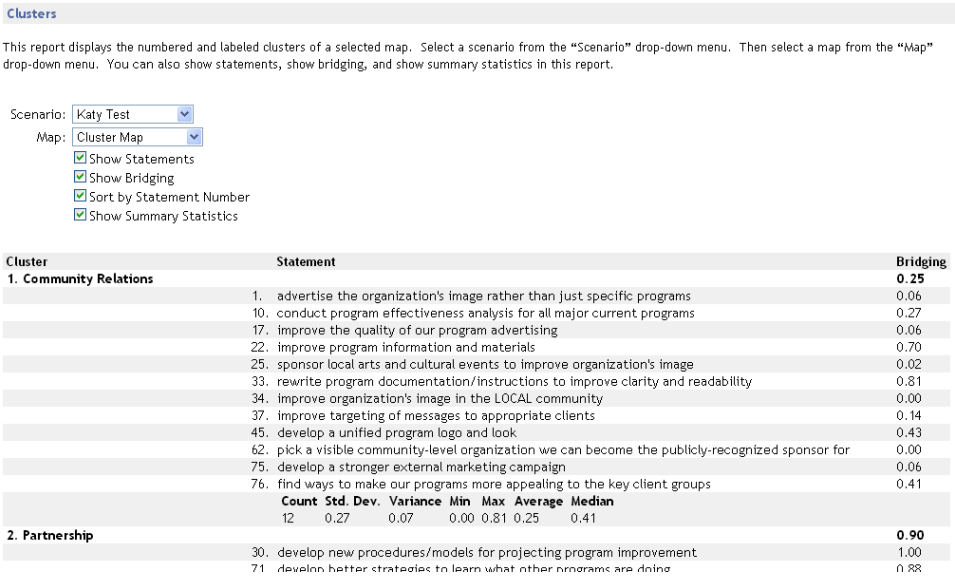
Rating: An optional filter to select a rating from the drop-down menu.

Show Demographics: This option will display the participant questions and the participant responses for each participant alongside the ratings

Show Summary Statistics: Select to display the average for each rating and the frequency for each value.

Clusters Report

This report displays the numbered and labeled clusters of a selected map. It can also display statements, bridging values, and summary statistics.



Clusters

This report displays the numbered and labeled clusters of a selected map. Select a scenario from the "Scenario" drop-down menu. Then select a map from the "Map" drop-down menu. You can also show statements, show bridging, and show summary statistics in this report.

Scenario: Katy Test
Map: Cluster Map
☑ Show Statements
☑ Show Bridging
☑ Sort by Statement Number
☑ Show Summary Statistics

Cluster		Statement	Bridging
1. Community Relations			**0.25**
	1.	advertise the organization's image rather than just specific programs	0.06
	10.	conduct program effectiveness analysis for all major current programs	0.27
	17.	improve the quality of our program advertising	0.06
	22.	improve program information and materials	0.70
	25.	sponsor local arts and cultural events to improve organization's image	0.02
	33.	rewrite program documentation/instructions to improve clarity and readability	0.81
	34.	improve organization's image in the LOCAL community	0.00
	37.	improve targeting of messages to appropriate clients	0.14
	45.	develop a unified program logo and look	0.43
	62.	pick a visible community-level organization we can become the publicly-recognized sponsor for	0.00
	75.	develop a stronger external marketing campaign	0.06
	76.	find ways to make our programs more appealing to the key client groups	0.41
		Count Std. Dev. Variance Min Max Average Median	
		12 0.27 0.07 0.00 0.81 0.25 0.41	
2. Partnership			**0.90**
	30.	develop new procedures/models for projecting program improvement	1.00
	71.	develop better strategies to learn what other programs are doing	0.88

Figure 83: Example of the Clusters Report.

Options include:

Show Statements: Shows each statement within each cluster.

Show Bridging: Displays the bridging value of each cluster and/or statement within a cluster. A bridging value always ranges from 0 to 1. The bridging value indicates whether the statement was sorted with others that are close to it on the map or whether it was sorted with items that are farther away on the map. The bridging value helps us to interpret what content is associated with specific areas of the map. Statements with lower bridging values are better indicators of the meaning of the part of the map they're located in than statements with higher bridging values.

The program also computes the average bridging value for a cluster. Clusters with higher bridging values are more likely to "bridge" between other clusters on the map. Clusters with low bridging values are usually more cohesive, easier to interpret, and reflect the content well in that part of the map.

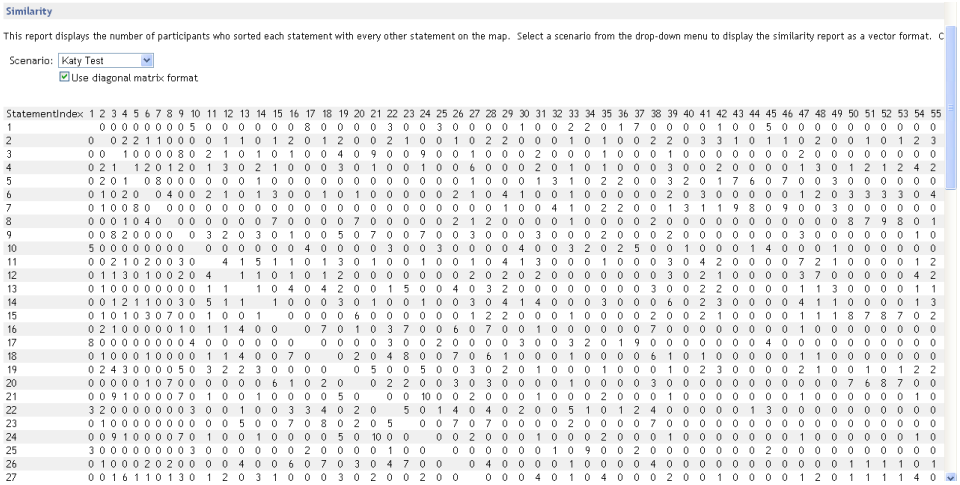
Sort by Statement Number: Sorts each statement in a cluster in ascending order by statement number.

Show Summary Statistics: Displays a number of statistics for each cluster, including statement count; standard deviation; variance; and minimum, maximum, average, and median figures for bridging or rating (depending on map selection).

Note: Once a Cluster Rating Map has been saved in the *Analysis* function, an additional option becomes available to show the clusters report including average rating data.

Similarity Report

This report displays the number of participants who sorted each statement with every other statement on the map. The similarity report can also be viewed as a matrix.



Similarity

This report displays the number of participants who sorted each statement with every other statement on the map. Select a scenario from the drop-down menu to display the similarity report as a vector format. C

Scenario: Katy Test

☑ Use diagonal matrix format

StatementIndex	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55
1		0	0	0	0	0	0	0	5	0	0	0	0	0	0	8	0	0	0	0	3	0	0	3	0	0	0	0	0	1	0	0	2	2	0	1	7	0	0	0	0	1	0	0	5	0	0	0	0	0	0	0	0	0	0
2	0		0	2	2	1	1	0	0	0	1	1	0	1	2	0	1	2	0	0	2	1	0	0	1	0	2	2	0	0	0	1	0	1	0	0	2	2	0	3	3	1	0	1	1	0	2	0	0	1	0	1	2	3
3	0	0		1	0	0	0	0	8	0	2	1	0	1	0	1	0	0	4	0	9	0	0	9	0	0	1	0	0	0	2	0	0	0	1	0	0	0	1	0	0	0	0	0	0	0	2	0	0	0	0	0	0	0	0
4	0	2	1		1	2	0	1	2	0	1	3	0	2	1	0	0	0	3	0	1	0	0	1	0	0	6	0	0	0	2	0	1	0	1	0	0	0	3	0	0	2	0	0	0	0	1	3	0	1	2	1	2	4	2
5	0	2	0	1		0	8	0	0	0	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1	3	1	0	2	2	0	0	3	2	0	1	7	6	0	7	0	0	3	0	0	0	0	0	0
6	0	1	0	2	0		0	4	0	0	2	1	0	1	3	0	0	1	0	1	0	0	0	0	0	2	1	0	4	1	0	0	1	0	0	0	0	0	2	0	3	0	0	0	0	0	1	2	0	3	3	3	3	0	4
7	0	1	0	0	8	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	4	1	0	2	2	0	0	1	3	1	1	9	8	0	9	0	0	3	0	0	0	0	0	0
8	0	0	0	1	0	4	0		0	0	0	0	0	0	7	0	0	0	0	7	0	0	0	0	0	2	1	2	0	0	0	0	1	0	0	0	0	2	0	0	0	0	0	0	0	0	0	0	0	8	7	9	8	0	1
9	0	0	8	2	0	0	0	0		0	3	2	0	3	0	1	0	0	5	0	7	0	0	7	0	0	3	0	0	0	3	0	0	0	2	0	0	0	2	0	0	0	0	0	0	0	3	0	0	0	0	0	1	0
10	5	0	0	0	0	0	0	0		0	0	0	0	0	0	4	0	0	0	0	3	0	0	3	0	0	0	0	0	4	0	0	3	2	0	2	5	0	0	1	0	0	0	1	4	0	0	0	1	0	0	0	0	0
11	0	0	2	1	0	2	0	0	3	0		4	1	5	1	1	0	1	3	0	1	0	0	1	0	0	1	0	4	1	3	0	0	0	1	0	0	0	3	0	4	2	0	0	0	0	7	2	1	0	0	0	0	1	2
12	0	1	1	3	0	1	0	0	2	0	4		1	1	0	1	0	1	2	0	0	0	0	0	0	0	2	0	2	0	2	0	0	0	0	0	0	0	3	0	2	1	0	0	0	0	3	7	0	0	0	0	0	4	2
13	0	1	0	0	0	0	0	0	0	0	1	1		1	0	4	0	4	2	0	0	1	5	0	0	4	0	3	2	0	0	0	0	0	0	0	0	3	0	0	2	2	0	0	0	0	1	1	3	0	0	0	0	1	1
14	0	0	1	2	1	1	0	0	3	0	5	1	1		1	0	0	0	3	0	1	0	0	1	0	0	3	0	4	1	4	0	0	0	3	0	0	0	6	0	2	3	0	0	0	0	4	1	1	0	0	0	0	1	3
15	0	1	0	1	0	3	0	7	0	0	1	0	0	1		0	0	0	0	6	0	0	0	0	0	0	1	2	2	0	0	0	1	0	0	0	0	2	0	0	2	1	0	0	0	0	1	1	1	8	7	8	7	0	2
16	0	2	1	0	0	0	0	0	1	0	1	1	4	0	0		0	7	0	1	0	3	7	0	0	6	0	7	0	0	1	0	0	0	0	0	0	7	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0	0
17	8	0	0	0	0	0	0	0	0	4	0	0	0	0	0	0		0	0	0	0	3	0	0	2	0	0	0	0	3	0	0	3	2	0	1	9	0	0	0	0	0	0	0	4	0	0	0	0	0	0	0	0	0	0
18	0	1	0	0	0	1	0	0	0	0	1	1	4	0	0	7	0		0	2	0	4	8	0	0	7	0	6	1	0	0	0	1	0	0	0	0	6	1	0	1	0	0	0	0	0	1	1	0	0	0	0	0	0	0
19	0	2	4	3	0	0	0	0	5	0	3	2	2	3	0	0	0	0		0	5	0	0	5	0	0	3	0	2	0	1	0	0	0	1	0	0	0	1	0	2	3	0	0	0	0	2	1	0	0	1	0	1	2	2
20	0	0	0	0	0	1	0	7	0	0	0	0	0	0	6	1	0	2	0		0	2	2	0	0	3	0	3	0	0	0	0	1	0	0	0	0	3	0	0	0	0	0	0	0	0	0	0	0	7	6	8	7	0	0
21	0	0	9	1	0	0	0	0	7	0	1	0	0	1	0	0	0	0	5	0		0	0	10	0	0	2	0	0	0	1	0	0	0	2	0	0	0	1	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1	0
22	3	2	0	0	0	0	0	0	0	3	0	0	1	0	0	3	3	4	0	2	0		5	0	1	4	0	4	0	2	0	0	5	1	0	1	2	4	0	0	0	0	0	1	3	0	0	0	0	0	0	0	0	0	0
23	0	1	0	0	0	0	0	0	0	0	0	5	0	0	7	0	8	0	2	0	5		0	0	7	0	7	0	0	0	0	2	0	0	0	0	7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
24	0	0	9	1	0	0	0	0	7	0	1	0	0	1	0	0	0	0	5	0	10	0	0		0	0	2	0	0	0	1	0	0	0	2	0	0	0	1	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1	0
25	3	0	0	0	0	0	0	0	0	3	0	0	0	0	0	0	2	0	0	0	0	1	0	0		0	0	0	0	0	0	1	0	9	0	0	2	0	0	0	0	0	0	0	2	0	0	0	0	0	0	0	0	0	0
26	0	1	0	0	0	2	0	2	0	0	0	0	4	0	0	6	0	7	0	3	0	4	7	0	0		0	4	0	0	0	0	1	0	0	0	0	4	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	0	1
27	0	0	1	6	1	1	0	1	3	0	1	2	0	3	1	0	0	0	3	0	2	0	0	2	0	0		0	0	0	4	0	1	0	4	0	0	0	2	0	0	1	0	0	0	0	1	2	0	1	1	1	1	4	0

Figure 84: Example of the Similarity Report.

Options include:

Use diagonal matrix format: Converts the long-form data into a matrix for easier viewing.

t-Test Report

This report can be used to calculate the t-value, degrees of freedom and p-value (significance) between two clusters on the same rating, or the same cluster on different ratings.

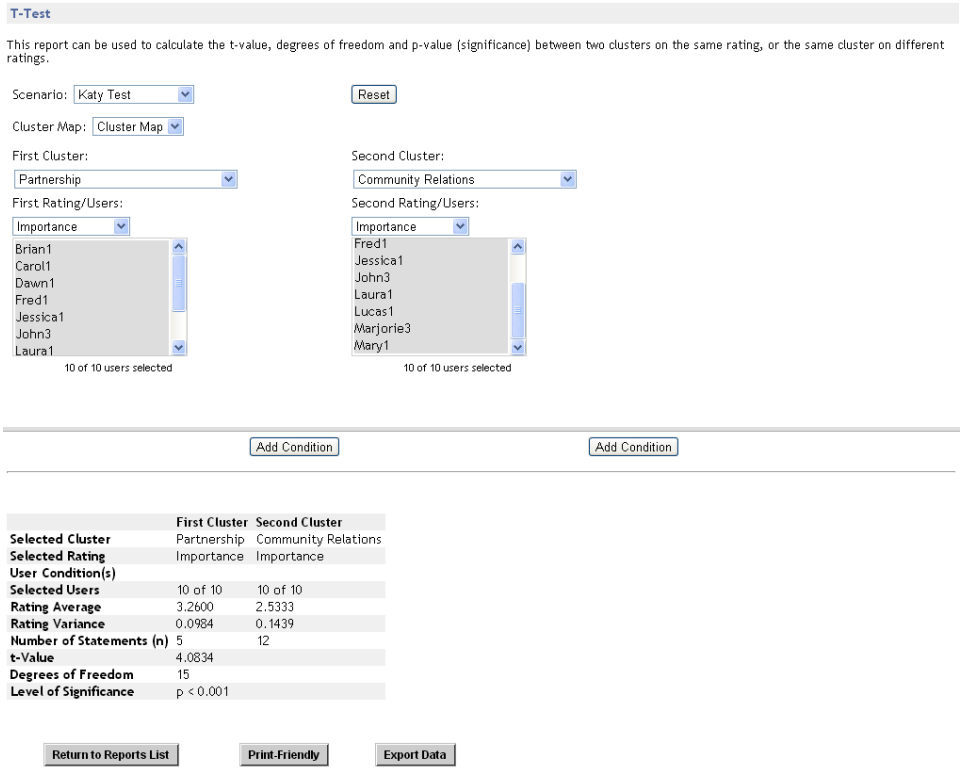


Figure 85: Example of the t-Test Report.

OTHER PROJECT MANAGEMENT SCREENS (Project Administrator Only)

This section details screens for additional project management functions including:

- Creating and managing project bulletins displayed on a project home page.
- Creating and sending e-mail messages to project participants, such as invitations to take part in project phases.
- Exporting project data to the CS Core application for analysis and mapping.
- Creating and maintaining internal notes.

Project Bulletins

This menu allows the Administrator to create bulletins that are displayed on the upper right hand corner of the project home page for participants to see when they log in to the project.

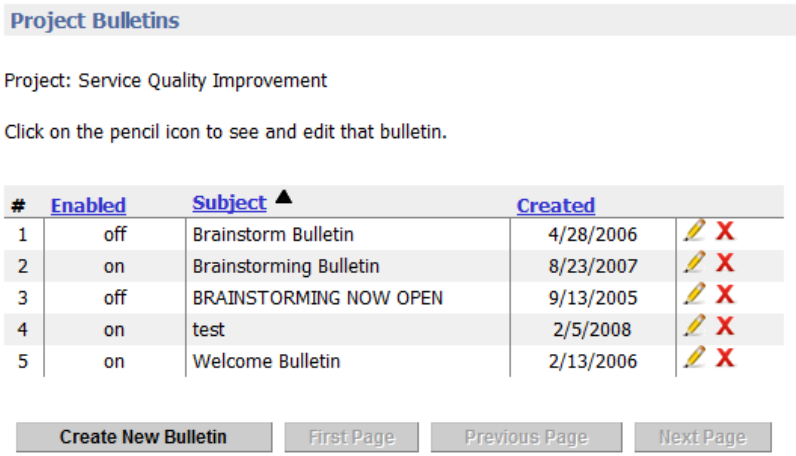


Figure 86: Example of the Project Bulletins screen.

Use the *Create New Bulletin* button to compose and send a new bulletin. Existing bulletins are listed on this menu together with their creation date and display status (on or off), as well as icons that allow editing or deleting the bulletin:

- Takes the Administrator to the **Edit Bulletin** menu to change bulletin text.

X - Deletes this bulletin from the project. This function will prompt the Administrator prior to deletion.

Create Bulletin

The Create Bulletin menu is used to compose a new project bulletin.

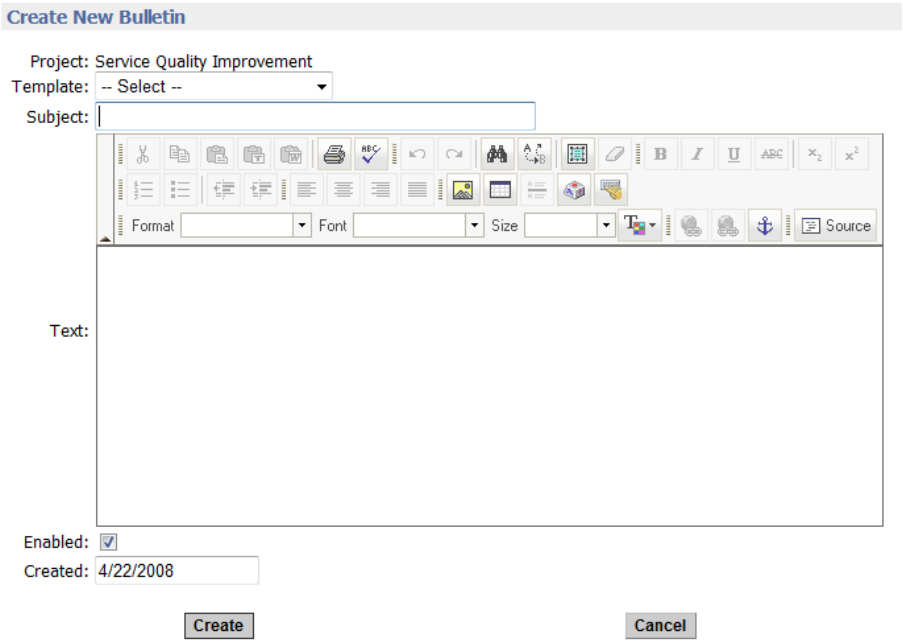


Figure 87: Example of the Create New Bulletin screen.

Options include:

Template: Select from an optional list of bulletin templates, including Brainstorming Bulletin, Project Completed Bulletin, and Welcome Bulletin.

Subject: Subject line header for bulletin.

Text: Enter text of bulletin here. This field also contains a formatting menu of icons, similar to popular word processors such as Microsoft Word®, allowing the Administrator to perform text formatting activities such as cut, paste, bold/italic/underline, bullets and numbering, special symbols, text coloring, and inserting tables and pictures

Enabled: Leave this box checked to display this bulletin on the project home page. When unchecked, it will not be displayed.

Created: Creation date for this bulletin, defaulting to the current date for a new bulletin.

Edit Bulletin

The Edit Bulletin menu is used to edit an existing project bulletin from the **Project Bulletins** menu. Its functionality is similar to that of the **Create Bulletin** menu described above. Access this screen via the pencil icon ( ) next to each bulletin listed.

E-Mail Messages

The E-Mail Messages menu allows the Administrator to create e-mail messages and send them to participant groups.

E-Mail Messages

Project: Service Quality Improvement

Create New Message

Click on the message subject to see detailed information.

#	Subject	Created	# Sent
1	Invitation Message	9/8/2005	0
2	Invitation Message	9/8/2005	0

First Page Previous Page Next Page

Figure 88: Example of the Email Messages screen.

Use the *Create New Message* button to compose and send a new message. Previously sent messages are listed on this menu, and clicking their links will allow you to view the message content and/or copy it to a new menu.

Create New Message

The Create New Message menu is used to compose and send an e-mail message to specified members of a participant group.

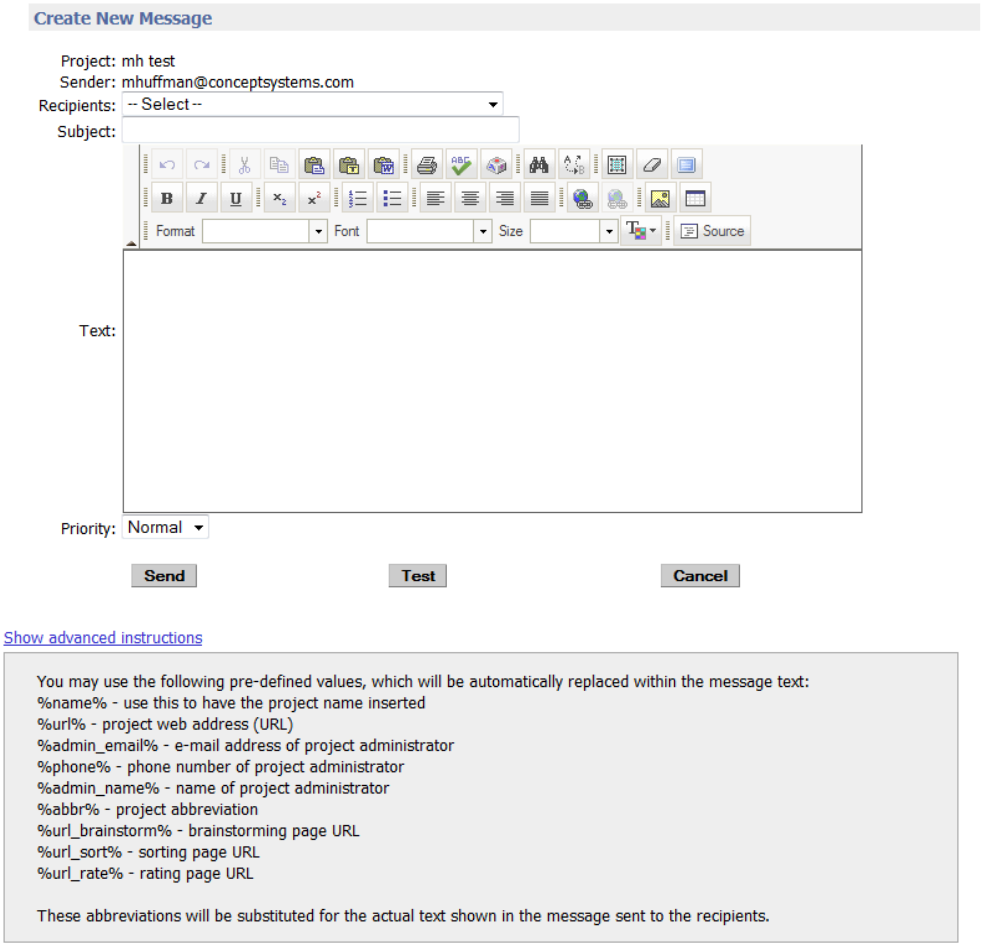


Figure 89: Example of the Create New Mail Message screen.

Options include:

Recipients: Select from one of several participant groups, including:

- All Associated With Project
- Assigned to Brainstorming
- Assigned to Brainstorming, not completed
- Assigned to Ratings

- Assigned to Ratings, not completed
- Assigned to Sorting
- Assigned to Sorting, not completed
- Assigned to Sorting and Ratings
- Assigned to Sorting and Rating, not completed
- Invited but never sent a message
- Invited but not yet accepted
- Project Administrators

Subject: Subject line header for e-mail message.

Text: Enter text of message here. This field also contains a menu of icons, similar to popular word processors such as Microsoft Word®, allowing the Administrator to perform text formatting activities such as cut, paste, bold/italic/underline, bullets and numbering, special symbols, text coloring, and inserting tables and pictures.

The Administrator may also use the following predefined field values, which will be populated within the message text as follows:

- %name% - project name
- %abbr% - project abbreviation
- %admin_email% - e-mail address of project Administrator
- %url% - project URL
- %phone% - phone number of project Administrator
- %admin_name% - name of project Administrator
- %url_brainstorm% - brainstorming page URL
- %url_sort% - sorting page URL
- %url_rate% - rating page URL

These abbreviations will be substituted for the actual text shown in the message sent to the recipients. The abbreviations can also be found on the Create New Message screen by clicking the Show advanced instructions hyperlink.

Once a message is composed, the Test button will send a test copy of the message to the sender, and the Send button will send the message to the recipient list. It is good practice to test each message before sending.

Note: The Administrator may also send other types of messages to participants with restricted registration (such as invitations to sort and/or rate).

View Messages

When the Administrator selects a message link from the **E-mail Messages** menu, this menu displays a copy of this message. The *Copy for New Message* button will open the **Create New Message** menu with a copy of this message text.

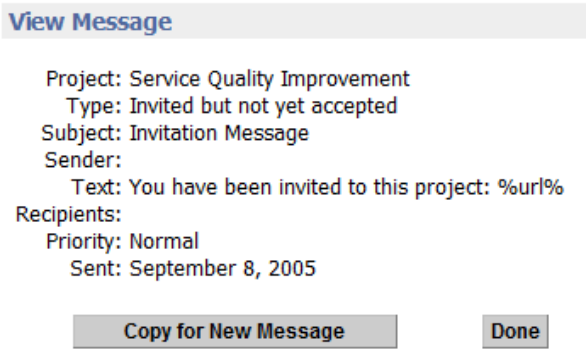


Figure 90: Example of the View Messages screen.

Project Export to CS Core™

In certain circumstances, including the conduct of older Concept Systems' research projects, it may be necessary to export collected data to the CS Core™ software application in order to produce analysis and reports outside of the online CS Global MAX™ system. This screen allows you to export this data. Follow the detailed on-screen instructions in this section to export

your file, import the file into CS Core™, and sign in to use the administrative functions of CS Core™.

Note: Most Concept Systems' projects no longer require the use of CS Core™. For detailed instructions on the use of The CS Core™ program for analysis and report production, if needed, please refer to the related CS Core™ Software Guide.

Project Export to CSCore

Exporting all of your project and user data from CS Global will allow you to import it into CS Core for analysis.

To Export Data from CS Global to CS Core:

1. Click on the **Export Project File** button below.
2. Save the file to a location on your computer, noting its location.
3. Open up the Concept System Core Program (Be sure you have the latest version from www.conceptsystems.com/content/view/cs-core-download.html)
4. Within CS Core, click on **Import**, browsing to the location where you just saved the Global file.
5. Select the location where you would like to save your project database on your computer.
6. Once you have completed the creation of your project database, it is recommended that you DELETE the .csg file from your computer. This will prevent confusion or possible version issues later if you export again.

Note that your administrative login is different than your login to CS Global; it is the part of the email address that is before the @ sign, up to 10 characters. The password will be the same. If you need to export the data again, this function will prompt you to overwrite the data that currently exists. (print these instructions)

Export Project File

Figure 91: Example of the Project Export to CS Core™ screen.

To begin this process, you will need to export your CS Global MAX™ (.csg) file. Select the *Export Project File* button at the bottom of this screen.

Note: Once you export your data into CS Core™, any subsequent exports of data will overwrite the database already existing in CS Core™.

Internal Notes

The Internal Notes screen allows the Administrator to create internal notes for himself/herself, and other assigned Project Administrators, for reference purposes. Unlike bulletins created via the **Project Bulletins** menu, which are displayed upon entry to a project, and viewed by all project participants, these notes are only visible via this **Internal Notes** menu.

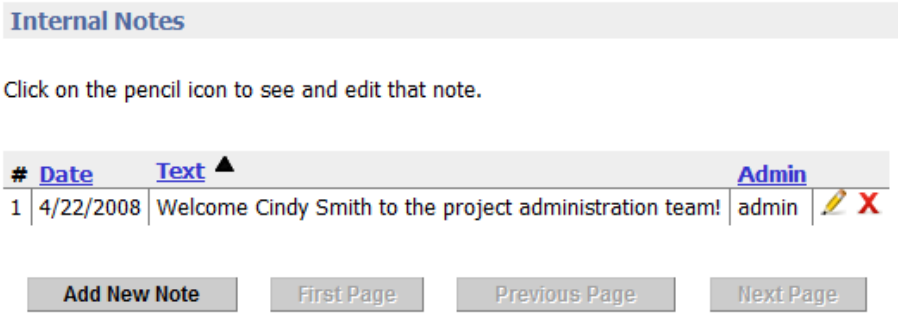


Figure 92: Example of the Internal Notes List screen.

The Administrator can enter new notes using the *Add New Note* button. If notes have been entered, this screen displays a list of existing notes with the following options:

- Takes the Administrator to the **Edit Note** menu to change note data.

X - Deletes this statement from the project. This function will prompt the Administrator prior to deletion.

Add New Note

The Add New Note screen creates a new note from the **Internal Notes** menu that can be shared amongst the project's Administrators. Enter the text and select *Create* to save it.

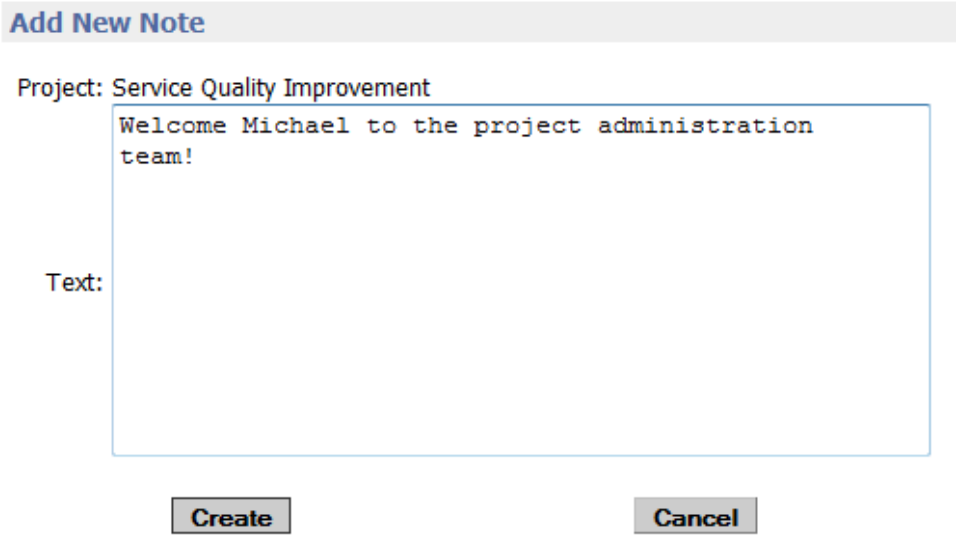


Figure 93: Example of the Add New Internal Note Screen.

Edit Note

The Edit Note screen allows the Administrator to edit a note selected from the list in the **Notes** menu. Its functionality is similar to the **Add New Note** function described previously. Access this screen via the pencil icon ( ) next to each note.

PROJECT PARTICIPATION SCREENS (Participant Access)

This section lists screens that participants see during a concept mapping project. These screens can be previewed via the **Project Preview** menu. The text for each of these screens can be easily customized for each project using the **Content Manager** menu described earlier.

Sign-up [for self-registration]

This screen allows participants to register and create a profile for project participation.

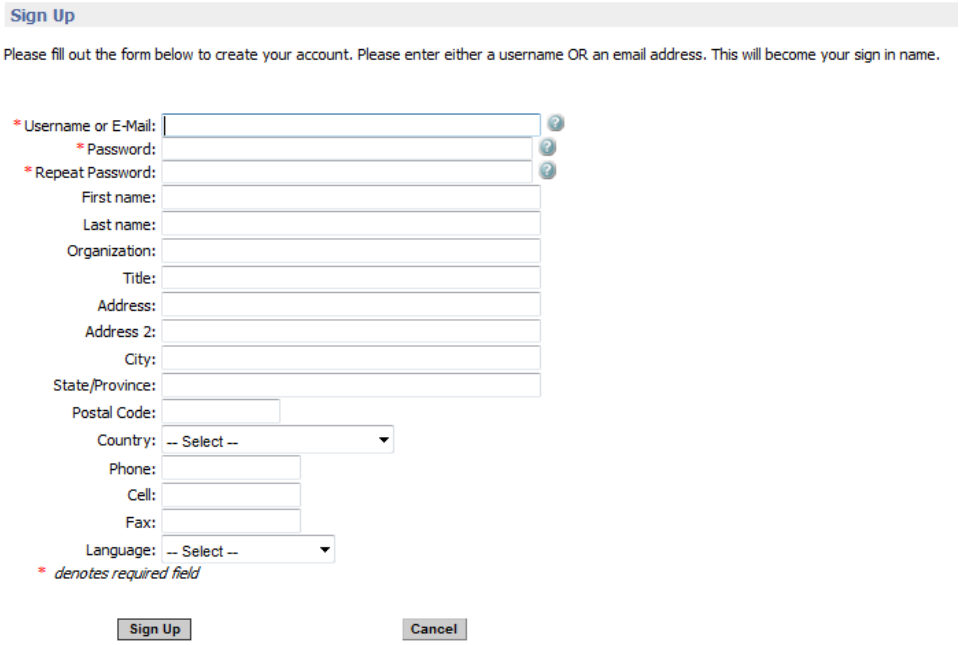


Figure 94: Example of the Participant Sign-up screen.

Participants may register with a username or e-mail address (strongly recommended) that can both serve as an anonymous name within the

project, and as a means to sign in and sign out of project screens throughout their involvement with the project.

For more information on self-registration, see the *General Screens* section in the **Project Settings** portion of this manual.

Informed Consent

This screen allows participants to accept or reject informed consent for voluntary project participation. Participants will have the option to select *Accept* to participate in the project, or *Reject* to decline participation.

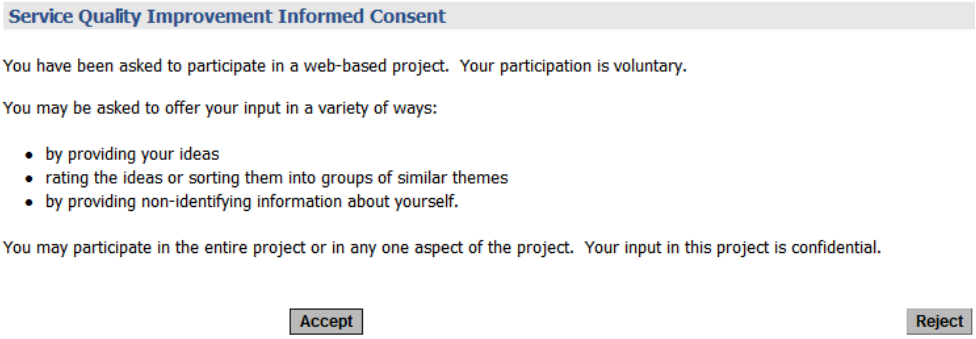


Figure 95: Example of the Participant Informed Consent screen.

Home Page

This screen describes your concept mapping project and lists the project components that are currently in progress.

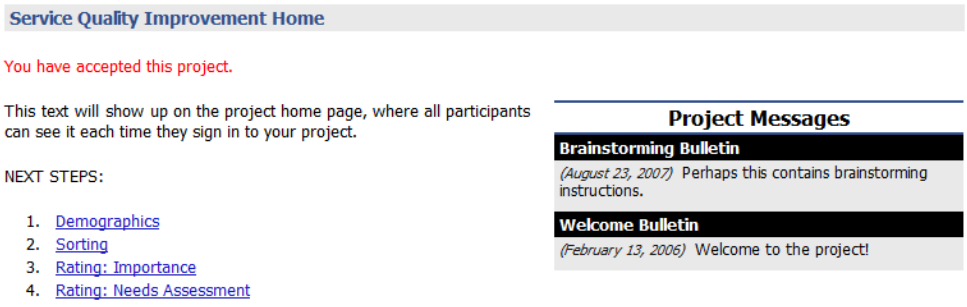


Figure 96: Example of the Participant Project Home screen.

Participants can complete these activities in any order following the brainstorming activity; they can select the link for the appropriate activity that they want to begin or continue completing.

Registered users with a username and password may save their work at any time by clicking the "Save" button then signing out of the project via the *Sign Out* link at the top of the screen. Participants may return to the **Project Home Page** menu at any time to complete activities by signing in again, using the web address provided for this project.

Participant Questions

This screen prompts participants to answer the specific question(s) created by the Administrator.

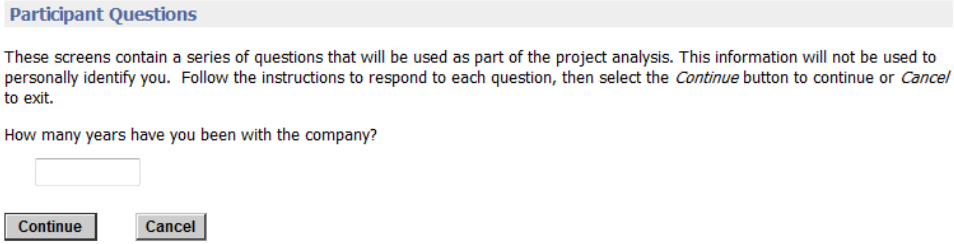


Figure 97: Example of the Participant View of the Participant Question screens.

Participants' answers will be aggregated for use during subgroup comparisons of rating responses, in Pattern Matches and Go-Zone analyses.

After answering the demographic question(s), participants can select Continue to finish or Cancel to exit. Depending on the project, participants may be prompted to answer one or more questions.

Brainstorming Page

Participants will follow the instructions on this screen to generate statements that answer the focus prompt. There is no limit on the number of statements a participant can add.

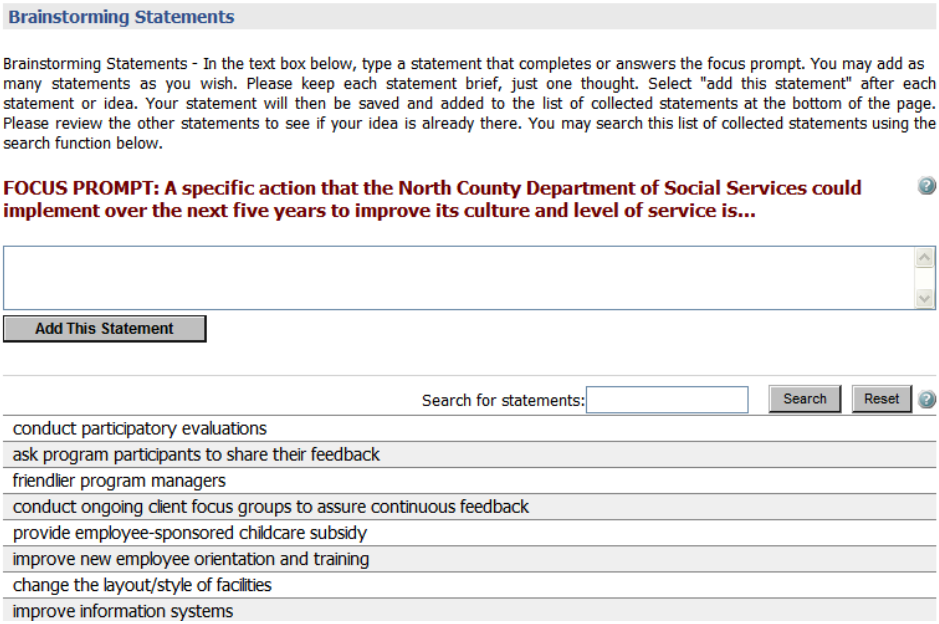


Figure 98: Example of the Participant Brainstorming Statements screen.

Sorting Instructions

Participants will follow the instructions on this screen to create the sorting categories. Progress is tracked visually in a progress bar located above the

unsorted statements in the Tabletop Sorting view, and above the sorting instructions in the Drop Down Sorting view.

Participants can use the *Switch View* option in the top and bottom right corners of the screen to view the sorting activity as preferred. The two options include Tabletop Sorting and Drop Down Sorting options (see below). Both options show the same sorting activity instructions, unless you modify the instructions via the **Content Manager** menu.

Once a participant has completed the sorting, the Administrator can access and "check" participant data through the **Review Participant Responses** icon (🔍) in the Participants list via the **Participants** menu.

With a **Table-Top Sorting** view (see below), the instructions appear directly on the screen and if closed can also be accessed by clicking the Instructions button in the upper left portion of the screen. The instructions window will remain visible throughout the sorting activity. In this view, the list of unsorted statements is displayed in a column on the left side of the screen below the project focus prompt.

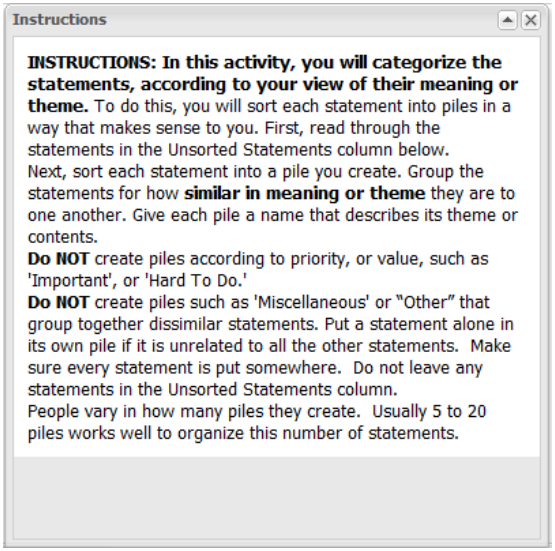


Figure 99: Example of the Tabletop Sorting instructions.

To sort a statement, drag the statement onto the open portion of the screen, i.e. the "table-top". The statement will display with a green check mark to indicate that the participant can move the statement to this location. The system will ask the participant to name a pile for this statement. Once the

pile has been created, the participant can drag and drop other statements into this pile, or create new piles by clicking the Create a pile button or by dragging a statement to an open portion of the screen. To save the sorting information, click Save. The participant will be able to return to complete their saved work if they are registered using self or restricted registration. The save and finish Save and Finish button will become available when at least 75% of the statements have been sorted.

The view of the sort piles can be customized by clicking "*Minimize All*," "*Maximize All*," or "*Arrange All*" which will align the sort piles in a grid on the screen.

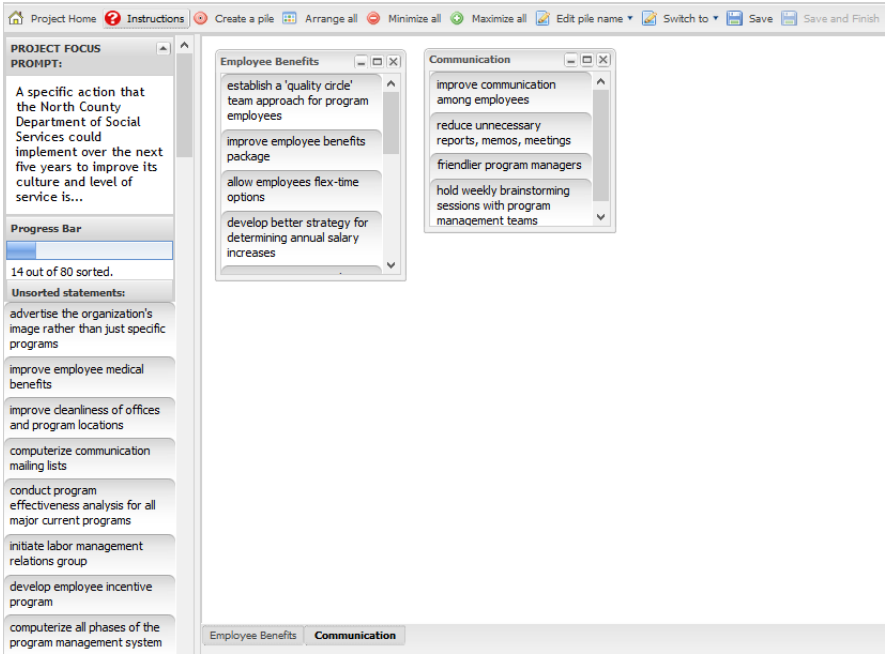


Figure 100: Example of the Table Top Statement Sorting screen.

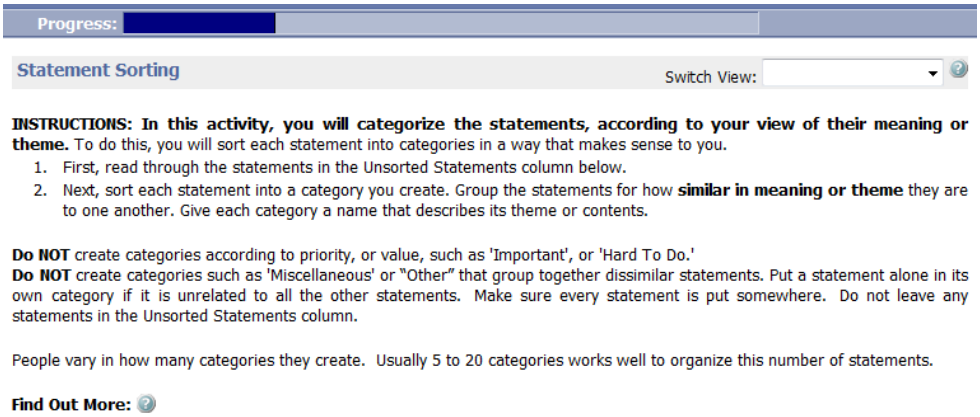


Figure 101: Example of the Drop Down Statement Sorting instructions.

With a **Drop Down Sorting** view (see below), the instructions appear at the top of the screen, with functionality to create new sorting categories directly below the instructions. The sorting activity is then displayed in two separate columns.

The statement set is displayed in the right column under "*Statements*". The left column contains a drop down box for each statement where a participant can select the sorting category to categorize the statement.

A participant can create a new sort category by clicking "Add New Category", and also can delete, rename, or alphabetize categories using the appropriate buttons. Once a participant has added at least one sort category, they can begin the activity by selecting the appropriate sort category in the left column next to each statement.

The *Save Sorting Information* button will save the current sorts. Participants can return to this screen to continue sorting at later time, if the participant is registered using self or restricted registration.

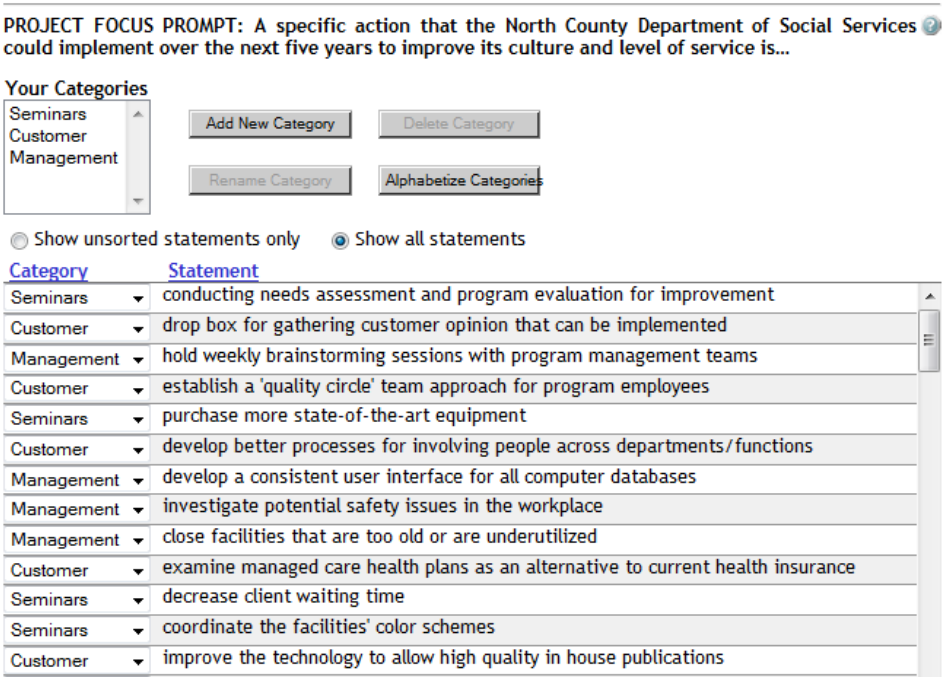


Figure 102: Example of the Drop Down Statement Sorting screen.

General Rating Instructions

Participants will follow the instructions on this screen to rate each of the statements in the list according to the rating questions and scale(s) the Project Administrator established. Progress is tracked visually in a 'progress' bar located above the rating instructions.

Progress:

Importance Rating

INSTRUCTIONS: Please rate the following statements, in the range indicated below.

Rate each statement on a 1-to-5 scale where: 1=relatively unimportant; 2=somewhat important; 3=moderately important; 4=very important; 5=extremely important.

Project Focus Prompt: A specific action that the North County Department of Social Services could implement over the next five years to improve its culture and level of service is...

Show unrated statements only Show all statements

Statement	**Rating** *Relatively Unimportant*				*Extremely Important*
advertise the organization's image rather than just specific programs	1	2	3	4	5
establish a 'quality circle' team approach for program employees	1	2	3	4	5
improve employee medical benefits	1	2	3	4	5
improve communication among employees	1	2	3	4	5
friendlier program managers	1	2	3	4	5
reduce unnecessary reports, memos, meetings	1	2	3	4	5
improve cleanliness of offices and program locations	1	2	3	4	5
computerize communication mailing lists	1	2	3	4	5
allow employees flex-time options	1	2	3	4	5

Figure 103: Example of the Statement Rating screen.

The **Save Rating Information** button will save the current rating information, which participants can return to later if they were registered using self or restricted registration.

Once rating activities are complete, the Administrator may access and "check"/"approve" participant data through the **Review Participant Responses** icon (🔍) in the Participants List, via the **Participants** menu.

Example: Reorganizing a Social Service Agency

Perhaps the best way to understand the program's capabilities is to explore a sample project[3] for the North County Department of Social Services. The following overview summarizes the basic steps of concept mapping, including data input, map analysis and interpretation, and pattern matching, using the program capabilities described in previous sections of this Software Guide. This section will give you valuable insight into the key steps of a Concept Systems™ Global project, as a facilitator and/or Project Administrator of the concept mapping process.

Client History

The North County Department of Social Services (NCDSS) serves a rural county of 200,000 residents as the provider for government-sponsored social programs such as welfare, food stamps, domestic violence intervention, foster care and child protective services. In addition to their own direct efforts, the Department maintains relationships with other area social services providers such as homeless shelters, faith-based organizations, mental health agencies and substance abuse treatment providers.

The Department recently came under new leadership following the retirement of the Administrator who had led it for the past 18 years. The new leader, John R. "JR" Garvey, has just relocated to the area after a successful tenure managing several smaller non-profit agencies in a large urban area in another part of the state. His arrival came at a challenging time

[3] Concept Mapping for Planning and Evaluation, by Kane and Trochim (Sage Publication, 2007) contains additional examples of concept mapping projects, including projects related to planning and evaluation.

for the agency, shrinking budgets and a workplace culture that is widely perceived to be in decline.

This change in leadership was precipitated in part by a well-publicized child welfare incident, in which the Department came under intense scrutiny by the local media for its handling of a neglected child in one of its client families. The new Administrator came into the job intending to re-organize the Department and, in the process, determine how to improve both its culture and performance.

The Issue

The North County Department of Social Services decided that they needed to undertake a comprehensive planning process to determine how best to reorganize its workplace functions and processes.

There were several issues that motivated the new Administrator's decision, including:

- A negative workplace culture marked by low employee morale, high levels of turnover, frequent fighting between departments, and a pervasive atmosphere of disrespect among the Department's front line employees towards the clients they serve.
- A decline in funding as a result of several rounds of state budget cuts in recent years.
- A state-level mandate for the Department to be more accountable for its performance, requiring more data to be captured and reported about its activities.

There were also a number of recurring questions that they struggled with:

- What kinds of interventions could improve the morale and culture of the workplace?

- How could the Department best improve relationships with its clients, its partners and the surrounding community?
- What investments need to be made in IT infrastructure to better serve clients and meet state reporting requirements?

Selecting the Participants

The new Administrator (JR) assembled a small team of ten people to run the planning effort. Of the ten, five were involved in client service and five were in administration. In addition, five were classified as managers and five were front-line staff. The group varied in how long each person had been with the Department.

Focus Prompt and Brainstorming

Concept mapping involves a "focus prompt," which guides participant brainstorming, producing ideas for subsequent sorting and rating. For NCDSS, the focus prompt was as follows:

A specific action that the North County Department of Social Services could implement over the next five years to improve its culture and level of service is…

Participants brainstormed ideas to complete this sentence to create the statement list.

Sorting

Each Participant sorted the statements into categories based on how similarly they felt statements related to one another. All participants completed this activity on their own, and also provided labels for each of the categories they created. Participants avoided the use of miscellaneous piles, and any statements that they were unsure how to sort were left unsorted.

Ratings

The group decided to rate the importance of each statement. In addition, they decided to have the manager of the client service and administrative teams each complete a "Needs Assessment Responsibility" rating to use in dividing the responsibility for subsequent needs assessment work between the two teams. Each team would complete the needs assessment in areas of their primary responsibility, as a means of understanding how each team perceives their respective responsibility.

Signing on to the system

As a Project Administrator, the first tool you will use for your project is The Concept System®, a web-based interface for managing the project. To enter The Concept System® go to www.conceptsystemsglobal.com and enter the username and password that was provided to you when you purchased your license.

Figure 104: Example of the CS Global Sign-in screen.

After you log in, you will see a home page showing all of your active projects.

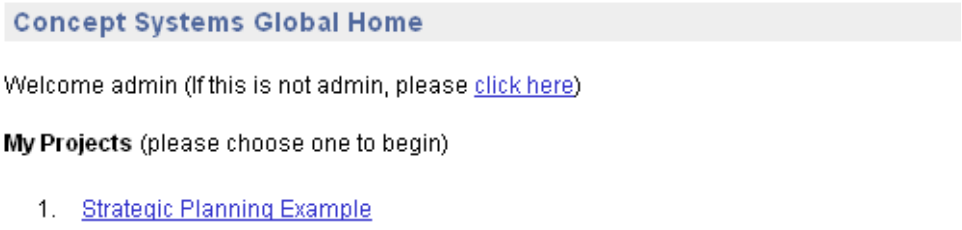
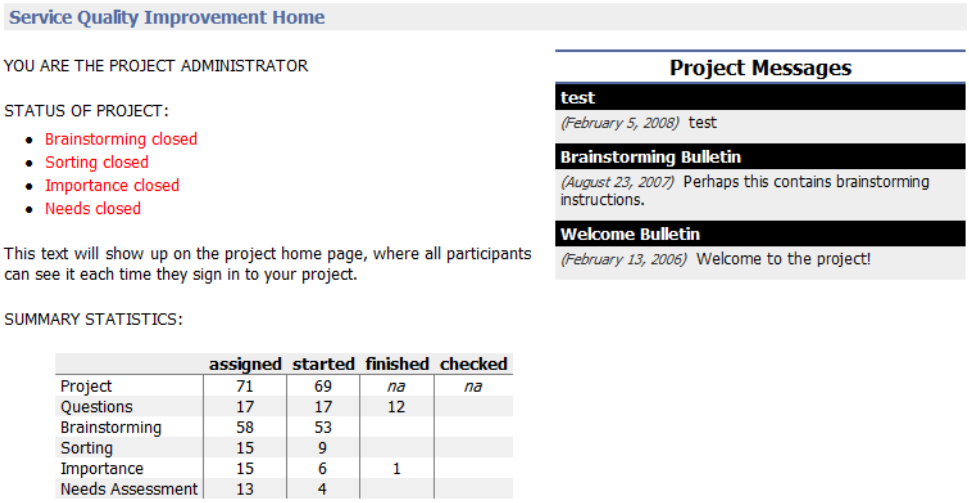


Figure 105: Example of the Project List screen.

Select your project – in this case, "Strategic Planning Example" – by clicking on the hyperlink. You can return to this home page at any time by clicking the Home icon (home) at the top right hand corner of the screen.

Project setup

After selecting your project, you will see the Administrator's project home screen, which shows the project status and next steps. In the case of our current example, the screen will show all key project steps as not yet complete.



	assigned	started	finished	checked
Project	71	69	*na*	*na*
Questions	17	17	12	
Brainstorming	58	53		
Sorting	15	9		
Importance	15	6	1	
Needs Assessment	13	4		

Figure 106: Example of the Administrator Project Home screen.

If this is the very first time you are entering this project, you will be asked to review and approve a **Project Confidentiality Statement** outlined in the Appendix of this Software Guide. This is a one-time prompt asked at the beginning of each new project.

Next, you will set up the focus statement and other participant options using the **Project Settings** menu.

Project Settings

Edit your project settings. Click on the help icons to get more information about each available setting.

General Settings	Action
header text	Service Quality Improvement Project
project abbreviation	Strategic Planning
project theme	ocean
logo image file	Browse... No file selected. ☐ Check this box to remove the current logo
focus statement	A specific action that the North County Department of Social Services could implement over the next five years to improve its culture and level of service is…
brainstorm max chars	
default sort method	Tabletop Sorting
Hide optional profile fields	☐

Participant Questions view	Action
Ask participant questions at brainstorming.	☐
Ask participant questions at sorting.	☐
Ask participant questions at Importance.	☐
Ask participant questions at Needs.	☐

brainstorming	Action
brainstorming active	☑
brainstorming registration	restricted registration

sorting	Action
sorting active	☐
sorting registration	-- Select --

Figure 107: Example of the Project Settings screen.

The **focus prompt** provides instruction to the participants about what to focus on during the brainstorming activity. It is often an open-ended

statement to be completed by participant responses; for example, the focus prompt for this project is:

A specific action that the North County Department of Social Services could implement over the next five years to improve its culture and level of service is…

After entering the focus prompt, you will be able to choose registration options for each phase of the project. For example, you can specify restricted registration for some or all of the phases of the project. Restricted registration allows the Administrator to maintain control over who can participate by assigning individual usernames and passwords, and also allows the Administrator to track who has completed each project phase. Other options include anonymous participation and self-registration which allows the participant to create their own unique username and password.

Participant Questions

Next, you are able select the questions (demographics) that you will ask participants to complete during the brainstorming, sorting, and/or rating process. You can create demographics by using the *Add New Demographic* button from the **Questions** menu, which brings up a screen for creating and editing participant questions. (The *label* field is defined via the **Content Manager** menu. It defaults to the value "Participant Question", and in this case has been set to "Demographic".)

In this example, participants were asked to answer the following three questions:

- How many years have you been with the organization?
- Are you a manager or staff person?
- Are you a part of client service or administrative staff?

The answers to these questions will be used later to compare maps and results between different groups if they are asked during the sorting and rating phases of the project.

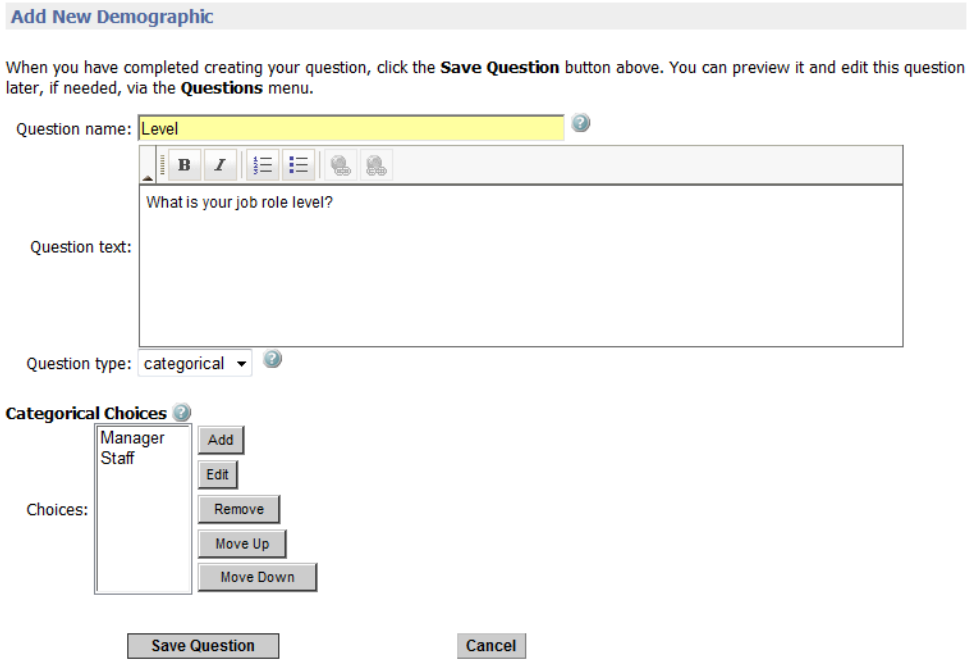


Figure 108: Example of the Add New Participant Question screen.

Entering Ratings

Next, you must enter the ratings (Importance and Needs Assessment Responsibility) described in the case example. To set these up, select the *Add New Rating* option in the **Ratings** menu, which will bring up a screen for creating and editing ratings.

Here, you will enter the ratings:

- Importance:
  Rate each statement on a 1-to-5 scale where: 1=relatively unimportant; 2=somewhat important; 3=moderately important; 4=very important; 5=extremely important.

- Needs Assessment Responsibility for managers:
  Rate this 1=Yes if you think your office should be responsible for the needs assessment on this item; rate 0=No if you don't.

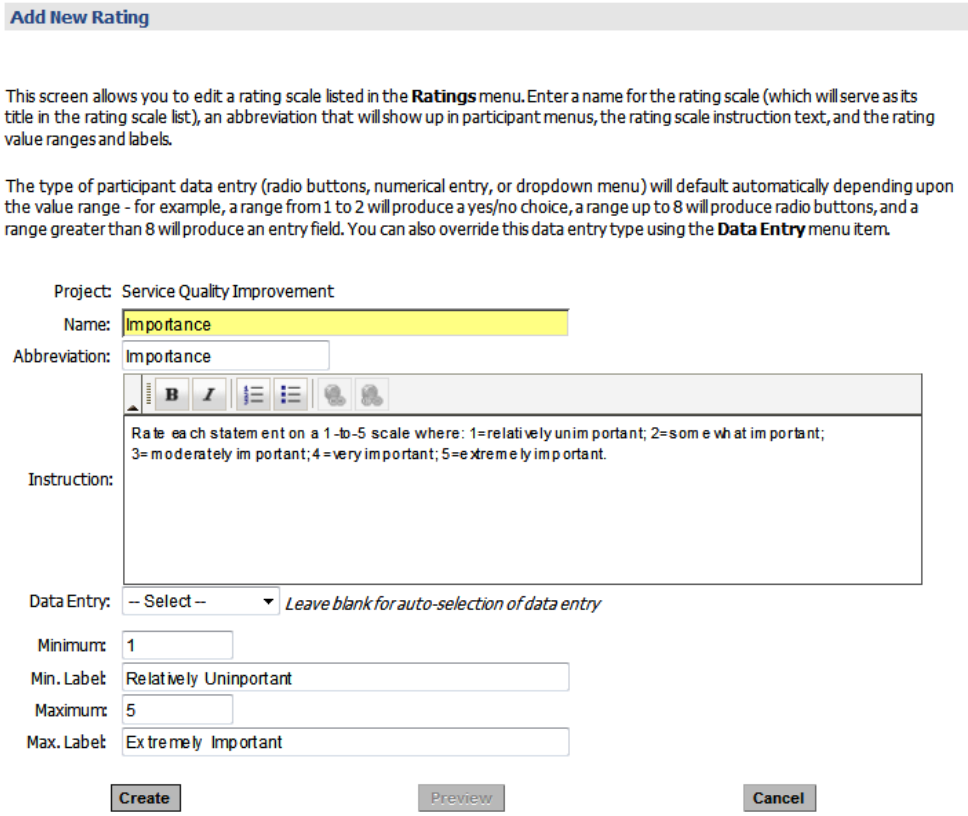


Figure 109: Example of the Add New Rating screen.

After you create these ratings, they can be edited by the Project Administrator using the **Ratings** menu.

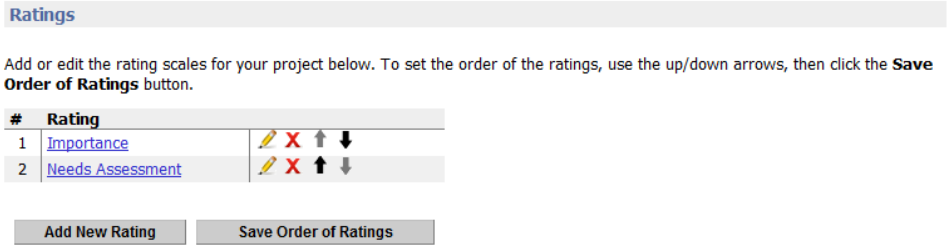


Figure 110: Example of the Rating List screen.

Entering Participants

Next, you will define the participants using the *Add New Participant* option in the **Participants** menu. This will prompt you to enter individual e-mail addresses.

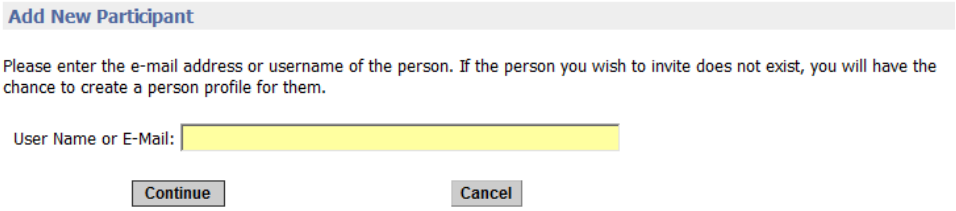


Figure 111: Example of the Add New Participant screen.

You can also add a list of participants in bulk entry, using e-mail addresses only, by entering or copying and pasting a list of e-mail addresses separated by spaces, commas, tabs, or carriage returns.

Project Totals *(including anonymous participants, SAVE to refresh statistics)* *scroll to top*

B	S	R1	R2	252 Invited 252 Accepted 0 Rejected
0	252	251	251	Assigned
0	208	142	97	Started
0	23	20	17	Finished
0	1	2	0	Checked

IC	Meaning
I	Invited
A	Accepted
R	Rejected

Code	Assignment
B	Brainstorming
S	Sorting
R1	Importance
R2	Needs Assessment

Status	Meaning
☑	Assigned
S	Started
F	Finished
C	Checked

Icon	Action
	Edit Profile
	View Profile
	Remove From Project
	Assign Activities
	Enter Numeric Sort
	Review Responses
	Assume Identity

Save Assignments | Add New Participant | Bulk Participant Entry

PARTICIPANT LINKS:

https://www.conceptsystemsglobal.com/DEMO5/brainstorm
[preview]
https://www.conceptsystemsglobal.com/DEMO5/sort
[preview]
https://www.conceptsystemsglobal.com/DEMO5/rate
[preview]
https://www.conceptsystemsglobal.com/DEMO5/sort/rate
[preview]

Copy and paste these links to guide your participants
into your project when communicating with them.

Figure: 112 Example of the Participant Links on the Participants screen.

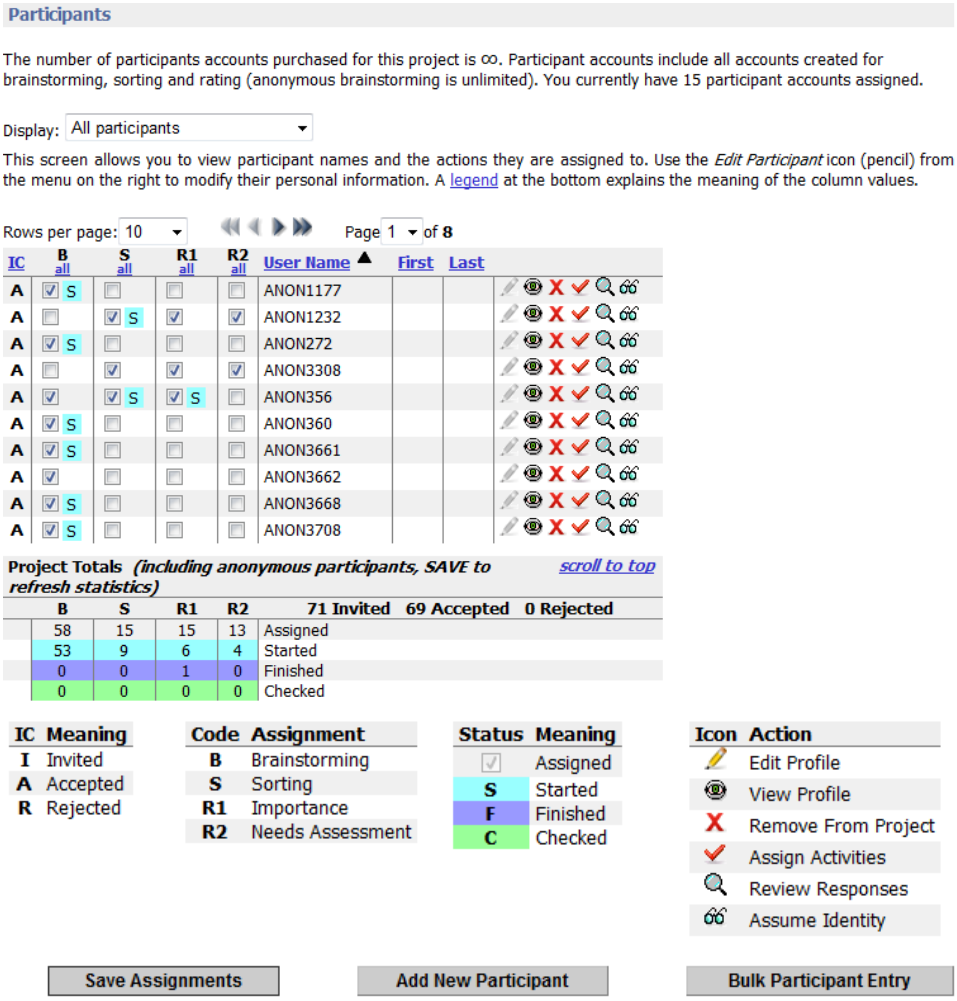


Figure 113: Example of the Participants screen.

There are several check boxes next to each name. You will use these checkboxes to assign participants to each phase of the project. In the case of the current example, you will check the columns for brainstorming, sorting, and the two rating values for the participants.

Select the *Save Assignments* option to save these assignments before exiting this menu. You can also assign participants to project phases as you create them through the *Add New Participant* screen.

Later in the project, you will use this screen to view participant progress on each activity. A turquoise **"S"** symbol means that a participant has *started* that particular activity; a purple **"F"** symbol means the participant has *finished* that particular activity, and a green **"C"** symbol means the participant's data has been *"checked"* for inclusion in analysis in CS Core.

Note: Before you invite people to participate in brainstorming, you must enable brainstorming for this project using the *Brainstorming Active* check box in the **Project Settings** menu.

Brainstorming Activity

The **E-mail Messages** menu is used to create and send e-mails inviting restricted registration participants to the brainstorming process.

Note: The **E-mail Messages** feature cannot be used for a brainstorming message if registration is set to anonymous or self- registration or if the participant's username is not their email address.

Create New Message

Project: Service Quality Improvement
Template: Brainstorming Message
Sender: anonymous@conceptsystems.com
Recipients: Assigned to Brainstorming
Subject: Brainstorming Message

Format Font Arial Size Source

Text:

You have been invited to participate in brainstorming for project %name%

Use this URL to view the site:
%url_brainstorm%

This project is being administered by: %admin_name% %admin_email%

Thank You.

Priority: Normal

Send Test Cancel

You may use the following pre-defined values, which will be automatically replaced within the message text:
%name% - use this to have the project name inserted
%url% - project web address (URL)
%admin_email% - e-mail address of project administrator
%phone% - phone number of project administrator
%admin_name% - name of project administrator
%abbr% - project abbreviation
%url_brainstorm% - brainstorming page URL
%url_sort% - sorting page URL
%url_rate% - rating page URL

These abbreviations will be substituted for the actual text shown in the message sent to the recipients.

Figure 114: Example of the Create New Email Messages screen.

The two alias strings in the message body (%url_brainstorm%) will substitute the project name and web address for brainstorming, respectively. A list of additional alias strings is shown below the e-mail message.

The project name and default URL can be viewed via the **Project Preview** menu, and edited using the **Project Settings** menu in the *Header Text* and *Abbreviation* fields.

Note: This example involves the remote entry of brainstorming statements by individual participants. For on-site groups it is also possible – and often desirable, because of group interaction – to brainstorm statements as a group process, and later have the statements imported into The Concept System® by the facilitator.

When participants receive this e-mail, they will be invited to click a link that will take them to the project web site. The e-mail will also contain their username (usually their e-mail address) and the password you will have created for them through restricted registration. Once participants sign in, they will see a main participant screen with links for the participant question and brainstorming activities. First, the participant will select a link – in this example, labeled as **Demographics** – which will take them to a screen to answer the participant questions.

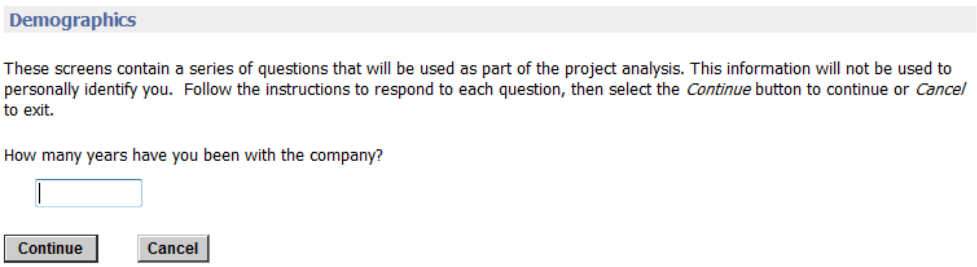


Figure 115: Example of the Participant View for the Participant Questions.

Each question will be asked in sequence as the participant selects the *Continue* button. After answering each question, the participant will return to the main screen and select the **Brainstorming** link, and will then prompt them to enter ideas in response to the project focus prompt.

As participants accept their invitations and enter their brainstorming statements, their input will automatically become part of a master list of statements that can be viewed by all project participants. The list of statements can also be edited or re-ordered by you and/or other assigned project administrators through the **Statements** menu shown below.

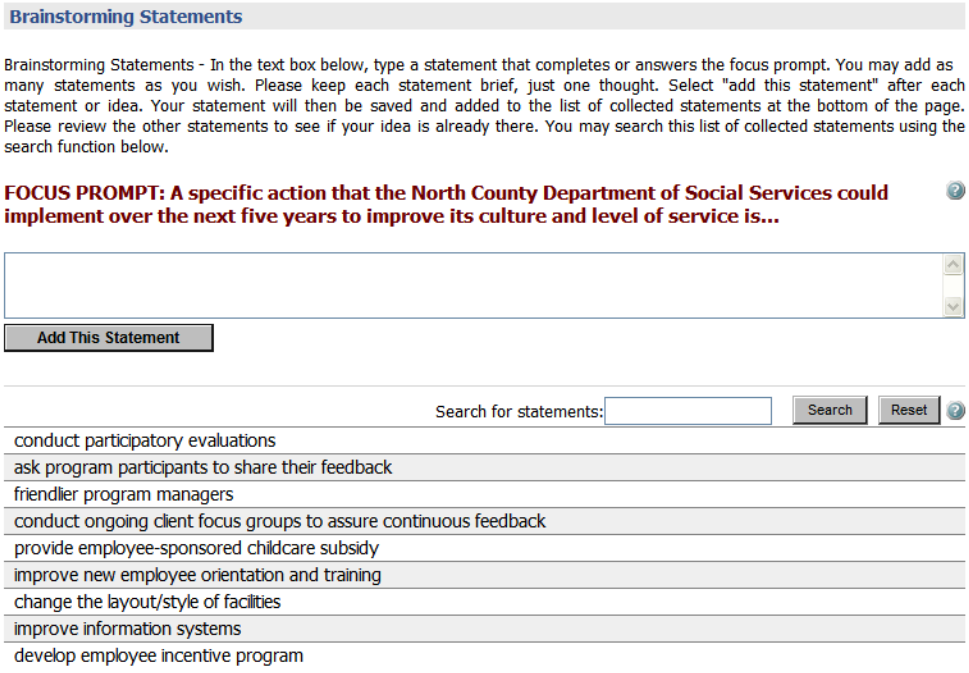


Figure 116: Example of the Participant View for the Brainstorming Statements screen.

You can add more statements to this master list throughout the brainstorming process using the *Import Statements* button below the instructions, while keeping the *Replace Statements* box unchecked.

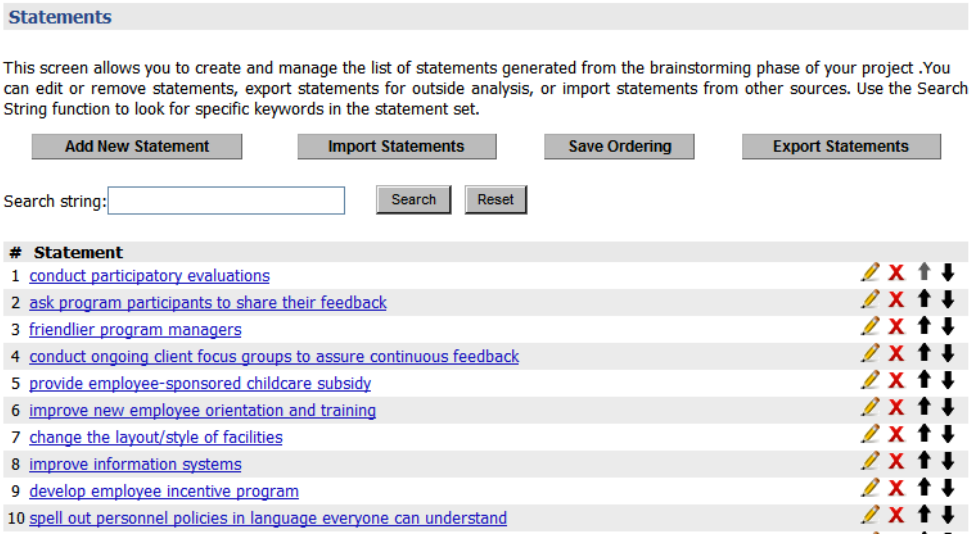


Figure 117: Example of the Administrator Statements Screen.

Once all participants have completed the brainstorming phase, you will close this process by un-checking the "*Brainstorming Active*" option on the **Project Settings** menu.

Next, you and your team will conduct an *Idea Synthesis*[4], in which duplicate and/or statements that do not clearly relate to the focus prompt are removed. Remaining statements should be edited for clarity, and should contain only one idea per statement. The Idea Synthesis process involves three steps:

- Export the original statements as a text file (.txt), using the *Export Statements* option from the **Statements** menu.
- Perform idea synthesis via off-line editing of this text file, which can be copied into a Microsoft Excel® or Word® document for ease of editing.

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[4] Concept Mapping for Planning and Evaluation, by Kane and Trochim (Sage Publication, 2007) contains a complete description of the Idea Synthesis process.

- Re-import the revised statements using the *Import Statements* option of the **Statements** menu. The system will only accept fewer than 125 statements for the sorting and rating process.

You can choose to overwrite the original statement set by checking the "Replace Statements" box under *Import Statements*. This new statement set will be used in the sorting, rating and mapping processes that follow.

Sorting and Rating Activities

When idea synthesis is complete, you will need to open the Sorting and Rating processes by checking the *Sorting Active* and *Rating Active* boxes on the **Project Settings** menu.

You can e-mail restricted registration participants who use their email address as their username, and invite them to participate in the sorting and rating activities via the **E-mail Messages** menu.

Note: Before inviting participants to the sorting and rating activities via restricted registration, you must enable these activities by selecting the "sorting active" and "rating active" check boxes on the **Project Settings** menu.

As with the brainstorming and sorting steps, participants with restricted registration will use the link in their invitations to take them to the sorting screen. Self-registered participants will select the sorting activity link to reach the sorting screen as shown below.

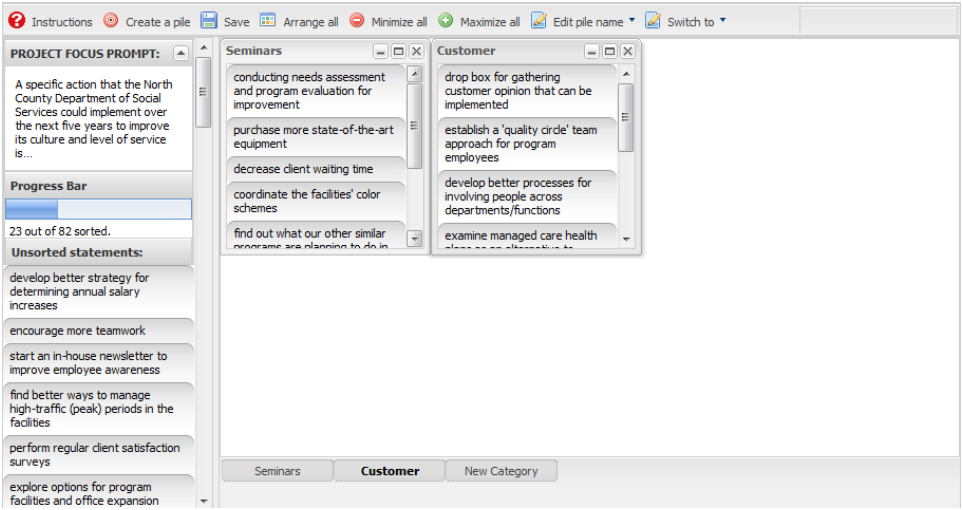

Figure 118: Example of the Tabletop Statements Sorting screen.

Sorting instructions will appear at the top of the sorting activity page. Participants should group statements together by **similar theme or meaning**, and should name that category accordingly. Categories should not be created according to priority, or value, such as 'Important', or 'Hard To Do', nor should they be grouped into categories named ‘Other’ or ‘Miscellaneous’ if they are dissimilar or unrelated to all other statements. Participants should not leave any statements unsorted.

There are three specific sorting guidelines:

- Participants cannot put all statements in 1 pile.
- Participants cannot put each statement in its own separate pile. (This would result in 80 separate piles for this example.)
- Participants should not develop a “miscellaneous” pile of unrelated items.

Participants can use the *Add Category* button to add new categories, such as "Communications" or "Programs", and then use one of three viewing options to sort the statements. With a **Table Top Sorting** view, participants can create categories and drag statements into the categories using an interface that simulates paper-based sorting. With a **Drop Down Sorting** view, participants can create categories then use a drop down menu to select the appropriate category for each statement. Once each of the statements has been categorized, the sorting activity is complete.

As with the other activities, you can invite participants with restricted registration by e-mail to take part in rating. In the example project, participants were asked to rate the statements on Importance and Needs Assessment Responsibility.

Participants with restricted registration are able to use the link in their invitations to access the rating activity. Self-registered participants will select the rating activity link on the project homepage to reach the rating screen shown below.

Progress:

Importance Rating

INSTRUCTIONS: Please rate the following statements, in the range indicated below.

Rate each statement on a 1-to-5 scale where: 1=relatively unimportant; 2=somewhat important; 3=moderately important; 4=very important; 5=extremely important.

Project Focus Prompt: A specific action that the North County Department of Social Services could implement over the next five years to improve its culture and level of service is...

Show unrated statements only Show all statements

Statement	Rating *Relatively Unimportant*				*Extremely Important*
advertise the organization's image rather than just specific programs	1	2	3	4	5
establish a 'quality circle' team approach for program employees	1	2	3	4	5
improve employee medical benefits	1	2	3	4	5
improve communication among employees	1	2	3	4	5
friendlier program managers	1	2	3	4	5
reduce unnecessary reports, memos, meetings	1	2	3	4	5
improve cleanliness of offices and program locations	1	2	3	4	5
computerize communication mailing lists	1	2	3	4	5
allow employees flex-time options	1	2	3	4	5

Figure 119: Example of the Participant View of the Importance Rating screen.

During the rating activity, participants select the importance value, ranging from 1 (lowest importance) to 5 (highest importance), that they believe best corresponds to each statement. The Needs Assessment Responsibility rating will allow self-identified managers to rate each statement with a value of 0 if they feel that the Needs Assessment for a statement is not their office's responsibility or a 1 if they feel that the Needs Assessment for a statement is their office's responsibility.

Note: The Concept System® design allows different participants to be invited to take part in different concept mapping activities (brainstorming, sorting and rating).

In this example, all participants were invited to take part in the brainstorming, sorting, and the Importance rating, while only managers were invited to participate in the Needs Assessment Responsibility rating.

"Checking" the Data

Before you are able to conduct analysis, you must "check" or "approve" participant data. Please refer to the **Review Participant Responses** section of the software guide for complete details on how to "check" participant data.

Analysis and Mapping

Once the sorting and rating processes have been completed and "checked", the project data can then be analyzed in the CS Global MAX™ system, and maps produced. Please refer to the **Analysis** section of this software guide for complete details on how to conduct concept mapping analysis and examples of results from this project.

Getting the Most out of The Concept System® Global MAX™

This Software Guide provides an overview of the concept mapping process and use of CS Global MAX™. Here are some ways to get further assistance:

Contact us

For live support from CSI's knowledgeable staff of consultants, contact us at:

Concept Systems, Incorporated
136 East State Street
Ithaca, NY 14850
Telephone: 607.272.1206
Fax: 607.272.1215

E-mail: csiinfo@conceptsystems.com

References

1-4: *Concept Mapping for Planning and Evaluation*. Kane and Trochim (Sage Publications, 2007).