

How to set quotas with Unipark

1. Go to the *questionnaire editor* and click on *quotas* in the left column. Then click on *create quota*:

The screenshot shows the 'Questionnaire editor' interface. On the left is a navigation menu with options: Questionnaire, Container depot, Filter list, Search and replace, Media library, **Quotas**, Codebook, Scale library, Language editor, Title editor, Wildcards, and Lists. The main content area has a blue header with an information icon and the text 'The survey is active! Performing any change will be reflected in the survey.' Below this, the survey ID '1380381' and title 'marketing Test 2020' are displayed. There are three tabs: 'Quotas' (selected), 'Configuration', and 'Quota statistics'. A warning message states: 'Please note that quotas will be influenced by belated changes. You can subscribe to automatic notifications of these errors by entering your email address in the field below.' Below the warning, it says 'Quotas in project: "marketing Test 2020"'. There is a '+ Create quota' button with a dropdown arrow and a 'View' button. At the bottom, a table header is visible with columns: ORDER, QUOTA ID, and NAME.

2. Name your quota, e.g. female for a quota on the gender, set the limit to your desired number of completes for this quota and save it:

The screenshot shows the 'Create quota' form within the 'Questionnaire editor'. The breadcrumb trail at the top reads: PROJECTS > SURVEY MENU > QUESTIONNAIRE EDITOR. The left navigation menu is partially visible, with 'Quotas' selected. The form has a 'Back to overview' link. It contains three input fields: 'Name (*)' with the value 'female', 'Target (*)' with the value '220', and 'Activate quota' with an unchecked checkbox. An information icon is next to the 'Activate quota' label.

3. Your quota has been created. Now click on the arrow in the “condition” field.

ORDER	QUOTA ID	NAME	TARGET	COUNT	STATUS	CONDITION	ACTIONS
1	2	female	220	0	inactive		

4. Here you choose the variable for the respective question and the corresponding code for the respective quota. In this case, select the variable v_55 for the gender question and code 2 for the response ‘female’.
Note: Please always put the quota questions at the beginning of your questionnaire so that non-fitting participants are screened out at the beginning of the survey.

CONJUNCTION	NEGATION	BRACKET	VARIABLES	CONDITION	CODE	BRACKET
	<input type="checkbox"/> !	<input type="checkbox"/> (v_55 (F1. gender)	=	2)

5. Afterwards, you create a filter including end page in the questionnaire editor. If you also checkmark ‘Jump to filter definition after creation’, the filter definition opens automatically after creation. This filter you place directly after the last quota-relevant question – in our example, just after the question on the participant’s gender:

Filter

Title: quota full

Insert a blank standard page into the new branch

Insert a blank final page into the new branch

Jump to filter definition after creation

Cancel OK

- The filter definition opens automatically. There, you select the variable quota (Quota ID of participant) and set the condition to equal 0. The 0 isn't displayed in the dropdown menu and has to be entered manually.

- In the properties of the last quota-relevant page, you checkmark *Check internal quotas*.
Important: the quota filter and the end page have to be placed after this filter.

Now the quota is set and when the desired number of participants per quota is reached, the quota is automatically closed. For testing, you can set a quota to 1, then we can check if everything is working fine when testing the redirect links.



Important: before soft launch the quota has to be adapted again.

This manual serves as a support for setting quotas. If you still have any questions, your responsible project manager will be there to assist you.

Good luck with your project!

Your Bilendi & respondi team