



User's Manual

The PARC® polling archive is a knowledge management system with data archive and retrieval capabilities specifically designed for the effective management of survey research materials.

PARC full-text searches all Word, Excel, PowerPoint, readable pdf and text files. Topline results and field-formatted questions are parsed and delivered individually. All search results are single-click linked to the project folder, which holds all associated files of any file type.

Question-level results can be combined and exported to create new topline documents or programmed questionnaires with the assurance of consistent wording, structure, instructions and coding over time.

PARC is hosted on the Microsoft Azure platform with DigiCert SSL encryption and optional two-factor authentication. Users can access only their own materials. Supported browsers include Chrome, Edge, Internet Explorer 11, Firefox and Safari. White-labeled accounts with a custom URL, logo, color scheme and home page text are available, as are public- or stakeholder-facing embedded iframe versions and local server-based installations.

Contents

I. ID Rights and Password Changes	2
II. Searching PARC	2
A. Basic Search.....	2
B. Advanced Search	3
C. Search Results	3
III. Downloading Search Results	4
A. General Downloading	4
B. Creating a Topline or Programmed Questionnaire Document	4
IV. PARC Administration	4
A. Create a new project folder	4
B. Find existing project folders, edit or copy headers, delete projects.....	5
C. File types and uploading files	5
V. Upload specifications for topline documents and programmed questionnaires	6
VI. Troubleshooting	7

I. ID Rights and Password Changes

Users can be administrative or non-administrative, as specified when created. Non-admin users have full search and export rights but cannot create or edit projects or upload or delete files.

Users should change their assigned passwords on first login. Click the gear icon on the top right side of the page next to the user ID. Protect your password as you would any other, change it regularly and notify your PARC representative if you've forgotten it.

Passwords must be 8-15 characters, including at least one lower case letter, one upper case, one number and one special character. Users will be locked out after five failed password attempts.

Log off when you are not using the system. Logins are automatically timed out daily at 3 a.m.

Optional two-factor authentication is available. Users must enter a code from their authenticator app in order to log in. Contact your PARC representative to activate TFA.

II. Searching PARC

Use the Search link on the navigation bar to search the archive.

A. Basic Search

PARC performs full-text searches of documents uploaded as topline, questionnaires or analyses, and filename searches of files uploaded in the "other" category. Search field labels can be customized (12-character limit) and custom dropdowns can be added.

- **Keyword:** For topline, questionnaires and analyses, search is Boolean. Search terms can be separated by "and," "or" or "and not." ("And" is assumed for terms without operators.) Use an asterisk for partial words (e.g., "marr*" will return "marry," "marriage," "married," "marrying"). Phrases within quotation marks will be matched exactly.

Documents uploaded in the "other" category are searched by filename only. These searches are not Boolean and require exact terms.

- **Project Only:** Display the project folder rather than individual search results.
- **Project:** Search by project name as designated when the project was created.
- **Question #:** Use when searching for individual question numbers. Use commas to separate multiple question identifiers.
- **From/to:** Enter start and/or end dates. Use the drop-down calendar if desired.

B. Advanced Search

Click the Adv Search button.

- Use Client, Field House, Subject, Notes, Geo and Universe fields to search whatever information was input into these fields when the project folder was created.
- In standard configurations, Mode is selected from a dropdown menu. Additional Mode items can be added.
- As with basic search, advanced search field labels can be customized (12-character limit) and custom dropdowns can be added.

C. Search Results

The results page indicates the number of matches on the search criteria. Up to 200 results are displayed, as is the total hit count. Click “Next” at the top or bottom of the page for additional results. Click “Previous” to page back. Results are presented in reverse chronological order, with the associated filename.

“Topline” displays individual questions and results. “Questionnaire” displays questions with coding and all programmer and interviewer instructions. “Analysis” refers to documents that are parsed for searching, but not on a question level. “Other” can include any files of any file type.

Search fields are optional; if all are left blank, a full-archive search will be performed.

- **Topline searches** perform full-text searches of Word, Excel or text documents, returning all individual questions that meet the search criteria. Click “Results” to see the full question and topline results. Click again to close the topline display. Click “Full document” to download the entire topline. Select individual questions for export. For Excel documents, “HTML Preview” displays a formatted version of the results.
- **Questionnaire searches** perform full-text searches of Word, Excel or text documents, returning all individual field-formatted questions that meet the search criteria. “Results” shows the full question in the same window. Click again to close the display. Click “Full document” to download the entire questionnaire. Select individual questions for export.
- **Analysis searches** perform full-text searches of Word, Excel, text, pdf and PowerPoint documents, returning all that meet the search criteria. Matches are displayed and highlighted. Click “Results” to review all matches within a document. Click “Full Document” to download any analysis in a separate window.
- **Other searches** return the filenames of documents designated as “other” that meet the search criteria. Filenames of topline, questionnaire or analysis documents are not returned; only “other” documents. Click “Full Document” to download the file.

- **Project-only searches** perform the same searches as above, but return all projects that include items that meet the search criteria rather than the items themselves. Click the folder icon to the left of the project name to view all files in the project folder.

All results also link at the left to the relevant project folder, via the folder icon.

III. Downloading Search Results

A. General Downloading

To save search results, select the results you want using the check boxes at left. (Use the check box at the far left of the header line to select *all* displayed results.) After you've selected items to be downloaded, click "Export" at top right. Select one of Export choices: with project ID, in which case the project folder name will be listed ahead of each downloaded item; or without ID.

A dialog box will ask if you want to complete the export or keep working. Click "OK" to download. Click "Continue" to continue selecting results. Click "Cancel" to clear the current selections. (Search results also can be cut and pasted out of a display window.)

B. Creating a Topline or Formatted Questionnaire Document

- Search for questions using keyword, project name and/or question number search functions.
- Click the checkbox to select desired questions.
- Click "Export," then (as needed) "Continue." Selected items will be stored in memory.
- When all questions are found, click "Export" and "OK." to download the new document.

IV. PARC Administration

Use the Admin link on the top navigation bar to manage PARC. Non-admin users can use the Admin page to see a list of all projects, but cannot take action (e.g., create, edit, copy, upload or delete). Admin rights are required to perform these tasks.

A. Create a new project folder

- On the Admin page, click the "Add" tab.
- Fill in desired header information.
 - Project Name is required. All other fields are optional, and (other than Mode and Start and End Date) any text can be typed into these fields. All fields are searchable.
 - Projects with start dates will be sorted in reverse chronological order. Those without start dates will be displayed at the bottom of the project list during searches.

- c. Character limits: Notes, 2,000; Subject, 1,000; Project, 500; Geo, 100; Universe, 100; Client, 50; Field House, 50.

iii. Click “Add.”

After creating the project, you’ll be switched to the Edit page to upload documents to archive.

B. Find existing project folders, edit or copy headers, delete projects

- i. On the Admin page, click the “Find” tab.
- ii. Enter any information to search for a project folder. (Leave fields blank to search all.)
- iii. Click the folder icon to see all archived files within any project folder.
- iv. Click the pencil icon to be transferred to the Edit page, where you can change or add header information or add or delete files within the selected project folder.
- v. Click the copy icon to copy header information to a new project.
- vi. Click the “X” icon to delete any individual project folder and all its archived files.
- vii. To delete multiple project folders at once, click the select boxes of the projects you want to delete (leftmost column of the display). This will activate the “Action” box, bottom right of the main header (next to “Search” and “Clear”). Click the “Action” box, then click “Delete Selected Polls.”

C. File types, uploading files

Analyses, topline documents and formatted questionnaires can be uploaded to be full-text searched. Any other files, of any file type, can be uploaded to be filename searched. Each project folder can contain multiple documents of any given type.

- i. Analyses (memos, reports, spreadsheets, PowerPoint presentations and other text content) can be in Word (.docx only), PDF, Excel (.xlsx only) or text (.txt) format. Topline documents and questionnaires must be in Word (.docx), Excel (.xlsx) or .txt. A batch converter is available to convert WordPerfect or older-format Word and Excel files into the .docx or .xlsx files.
- ii. To upload files, search for an existing project folder and click the pencil icon. This will take you to the Edit page.
- iii. Under “Upload Document” on the Edit page, click the dropdown menu to select the file type to be uploaded – Topline, Questionnaire, Analysis or Other.

- iv. Click the folder icon to select the file to be uploaded. Multiple files can be uploaded at once; select using the shift key for consecutive files or the ctrl/cmd key (PC/Mac) for non-consecutive files.
- v. Click Upload.
- vi. The file will be listed under the Existing Document list if the upload was successful. If unsuccessful, an error message will indicate the problem.
- vii. Individual uploads have a size limit of 25 MB. Contact your PARC representative for larger file permission.

V. Upload specifications for topline documents and formatted questionnaires

- i. PARC is designed to parse text. Non-text content (e.g., pictures, graphs, tables) in parsed documents may cause irregular output formatting. Auto-formatted lists,¹ custom tab stops and displays created using tables may parse less well than plain text. Analysis or “other” document upload options are alternatives for these documents.
- ii. When uploading topline or questionnaire documents in Excel, list each question number (or other identifier) and question in Column A, with no spaces before the question number. Merged cells are acceptable. List response categories and results in rows beneath. (SPSS output to Excel automatically produces this format.) Only the first worksheet in a document will be processed. For optimal formatting, data in all columns combined should not exceed 100 characters.
- iii. To be parsed, questions listed in topline documents and questionnaires must begin with any of the following question identifiers. (Do not use these sequences in text that is not meant to be parsed.) Additional parsing rules can be created on a custom basis.
 - digit(s); period; space, tab or newline (example: 1., 10., 103.)
 - digit(s); letter(s); period; space, tab or newline (1a., 10B., 103xyz.)
 - letter(s); digit(s); period; space, tab or newline (a1., Q10., xyz103.)
 - letter(s); digit(s); letter(s); period; space, tab or newline (a1a., Q4b., Ab10aB.)
 - letter Q; period; digit(s); space, tab or newline (q.1, Q.10)
 - letter Q; period; digit(s); letter; space, tab or newline (Q.1b, q.10B, Q.103x)
 - letter Q; digit(s); space, tab or newline (q1, Q10)
 - letter Q; digit(s); letter; space, tab or newline (Q1a, q10B, Q103x)

¹ To automatically convert all numbered or bulleted lists to plain text in Word, using Windows, press Alt-F11 to activate the Visual Basic Editor. If it’s not already visible, press Ctrl-G to bring up the “Immediate” field. Enter `ActiveDocument.ConvertNumbersToText` into that field. Press enter, exit the editor, and save your document. Contact us for assistance with VBA syntax or other batch conversion needs.

A single hyphen or underscore can be used within parsers. Questions labeled with only a letter (e.g. “A.”) will not be parsed).

VI. Troubleshooting

- **Issue:** Immediately after logging in, a dialog box appears saying “! Session expired. Please log in.”
- **Solution:** Enable first-party cookies.
 - In IE, go to Tools, then to Internet Options; go to the Privacy tab and click “Advanced.” Click “Override automatic cookie handling” (if available). Click “Accept” for First-party Cookies. Quit and restart IE.
 - In Chrome, click the pulldown menu button (three-line button on the top right), then Settings, then Show Advanced Settings. At Privacy, click Content Settings; under Cookies select “Allow local data to be set (recommended)”.