THE SURVEY SYSTEM

The Survey System - Version 10 for Windows

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Limited Warranty

If a registered user finds a circumstance in which the program fails to work as described in this tutorial, Creative Research Systems will repair or replace it at no charge. This commitment will remain in effect for one year, provided the user purchases any major new version of The Survey System that is released during that year. In no event can Creative Research Systems be liable for any incidental or consequent damages arising from the use or inability to use this product.

We thank the many loyal users of The Survey System for their comments and suggestions, many of which were incorporated into this version of The Survey System.

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Table of Contents

Chapter 1: Before Using The Survey System

System Requirements

The Survey System runs on Windows 98® or later PCs. It requires a Pentium™ or later with at least 64MB RAM and 20MB hard disk space.

Installing The Survey System

The entire Survey System ships on one CD, which includes any Interview or PDA stations or extra modules. The program files are also available for download. The installation program decompresses the program files and registers the necessary components of The Survey System with your copy of Windows.

ⓘ You must have a printer installed in the Windows Printers folder, even if you do not have a physical printer connected to the computer. The Survey System requires a printer driver to show reports on the screen. If you have not yet installed a printer, please do so now (see Windows' Help if you need help installing a printer).

- Check the **Task Bar** to make sure no other programs are running before you start.

If other programs are running, close them before starting installation. Check the Task List/Task Manager (depending on your version of Windows) by pressing the **Ctrl-Alt-Delete** key combination to end any tasks that are not part of Windows itself, especially anti-virus programs.

If you have The Survey System on a CD:

- Insert the CD in your PC.

- If the CD starts automatically, select **Install The Survey System**. If not select **Start/Run** and type in X:\10SETUP (where X is the CD drive letter). Most PCs use D or E as the drive letter, but this may vary.

If you downloaded the Evaluation Edition from our Web site:

- Unzip the file into a temporary folder. Then run it.
- Follow the on-screen prompts and the program will install.

When the installation is finished, The Survey System's shortcut icon (shown below) will appear on your desktop.

The Tutorial

This **tutorial** takes you through a survey step-by-step. It shows you how to enter instructions and data and create reports. Later sections cover **Internet Surveys**.

The sample windows in this tutorial use The Survey System Enterprise Edition with additional modules. If you have the Professional Edition or lack some optional modules, you may notice slight differences between your screen and the tutorial.

Specialized words are explained in the **Glossary** help topic. The **Context Sensitive** help topics provide detailed explanations and information.

If You Need Help

The Survey System also provides other ways to help you learn about and use your software, including a **PowerPoint tutorial** on the CD, and **on-line context-sensitive help topics**. You can find hints on designing and administering questionnaires in the Survey Design section of our website at www.surveysystem.com/sdesign.htm.

Searchable and Context-Sensitive Help

When using The Survey System, you can click **Help** on the main menu bar. You can choose to see the Help File's **Table of Contents**, including an overview of The Survey System, use the **Index** or **Search** for a key word. There is a **Troubleshooting** topic that solves problems. While in most parts of the program, you can press the **F1** key to call up the help topic that discusses your current options.

Product Support

Our clients consistently rate Creative Research System's customer support as superior. If you cannot find an answer to your question in the Tutorial or in the Help File, our technical staff can provide assistance. Technical support is available Monday through Friday from 9 a.m. to 5 p.m. (Pacific Standard Time). Users are also welcome to fax or email questions to us. You can download updates and find other information at our web site at www.surveysystem.com/downloads.htm. We recommend checking on a monthly basis to see if there are any updates.

When calling for technical support, *please provide your serial number*. This appears on the start up screen of the program. You can also select **Help/About The Survey System** from the **main menu** bar to locate it. If you call because you experienced an error message, please note the *exact* message and what you were doing when it occurred.

Comments and suggestions for improvements are always welcome. Many enhancements to The Survey System have come from user requests. Contact us details are available on the reverse of the title page.

Other Services for Our Users

Adding Modules

Purchase additional modules and edition upgrades by telephone with a credit card and they will be sent to you electronically. Simply call us with a valid credit card

(American Express, MasterCard or Visa), and you can have the new software in minutes.

Customization

If you have special needs, we can probably modify your copy of The Survey System. Please contact us with your specific requests, and we will quote feasibility, cost and delivery time.

Data Processing

Creative Research Systems offers a variety of data processing services to our clients. We can create question files from your script, or create a question file based on an existing data file. Data is entered, checked and supplied electronically as raw data and/or as a hard copy processed tables.

Web Surveys

We can create your web surveys, host them on our dedicated server and send out the email invitations. Fax or email a sample questionnaire to us for a quotation on turnaround time and cost. We also provide *hosting services* for surveys that you create and manage from your desktop PC.

Chapter 2: Entering Questions

If you have not already installed The Survey System, please do so now (see page61* or *the Installation topic in the Help File on the CD).

In **Entering Questions** you will:

- Learn about Question Files and the different kinds of questions.
- Enter five questions by typing them.
- Enter two questions by copying them.
- Produce a questionnaire form.

Opening The Survey System

Once you have installed The Survey System, open it by double-clicking The Survey System icon on your Desktop:

The Survey System consists of a series of windows. The title window will appear followed by a page with the **Main Menu** bar across the top.

In **Entering Questions**, we will guide you through entering the sample survey window-by-window. The files we create will have names that are variations on "demo" If you would rather not create the files yourself, but would simply like to follow along on-screen, we have supplied a set of files to accompany this tutorial. These files all have variations on the name "v10demo."

ⓘ While we will go window by window through these examples, we will not explain every option you will see. If you are curious about an option not described here, use the F1 key to bring up the relevant help topic.

The Question File

This is the key file for a survey. At a minimum a Question File holds the question text and answer choices. It can also include logic instructions that modify how interviews, Web page surveys or PDA surveys flow.

The Survey System offers many options to tailor reports and Web page surveys to meet your needs. Some of these options apply to whole surveys. Others apply to individual questions. The options that apply to individual questions are part of a Question File. The Survey System uses the same Question File to enter data, produce reports and graphs, create questionnaire forms and set up Web, PDA and telephone surveys.

The Survey System makes is easy to create a Question File. You can:

- Type questions and answer choices directly into The Survey System.
- Copy complete questions from existing Question Files.
- Copy answer choices from an expandable library. This is a great time saver when you have to re-use long lists of product names, countries, areas etc.
- Import a questionnaire from a Word, RTF or TXT document.

You can combine these methods as you wish. We will use all of them in this tutorial.

Figure 1 : The Sample Questionnaire

Q.1 This is a demonstration survey for the Survey System

Q.2 Have you purchased an ACME product in the last year?

❑ 1 Yes ❑ 2 No

Q.3 In which months did you take any vacation days last year?

❑ 01 January	❑ 07 July
❑ 02 February	❑ 08 August
❑ 03 March	❑ 09 September
❑ 04 April	❑ 10 October
❑ 05 May	❑ 11 November
❑ 06 June	❑ 12 December

Q.4 What percentage of your monthly income do you spend on each of the following?

Accommodation	____	Entertainment	____
Food	____	Medical	____
Travel	____		

Q.5 How much do you agree or disagree with the following statements about your ACME representative?

	Level of Agreement				
	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Is courteous and helpful	❑ 5	❑ 4	❑ 3	❑ 2	❑ 1
Returns my calls promptly	❑ 5	❑ 4	❑ 3	❑ 2	❑ 1
Understands my needs	❑ 5	❑ 4	❑ 3	❑ 2	❑ 1
Keeps me informed of new products	❑ 5	❑ 4	❑ 3	❑ 2	❑ 1
Knows industry standards	❑ 5	❑ 4	❑ 3	❑ 2	❑ 1

Q.6 What can ACME Industries do to most improve their service?

____

____

Q.7 What is your gender?

❑ 1 Male ❑ 2 Female

Q.8 What is your age?

❑ 1 18-34 ❑ 2 35-49 ❑ 3 50+

Creating the Question File

➢ Select **Instructions/Question/New** from the Main Menu.

ⓘ To follow along using example files instead of creating new ones, **open** the Question File "v10demo," choose **Instructions/Question/Edit** from the Main Menu and select the **Gen Info** button in the **Question to Edit** window. When you have finished with the General Information window, continue by using the **Edit** button in the Question to Edit window.

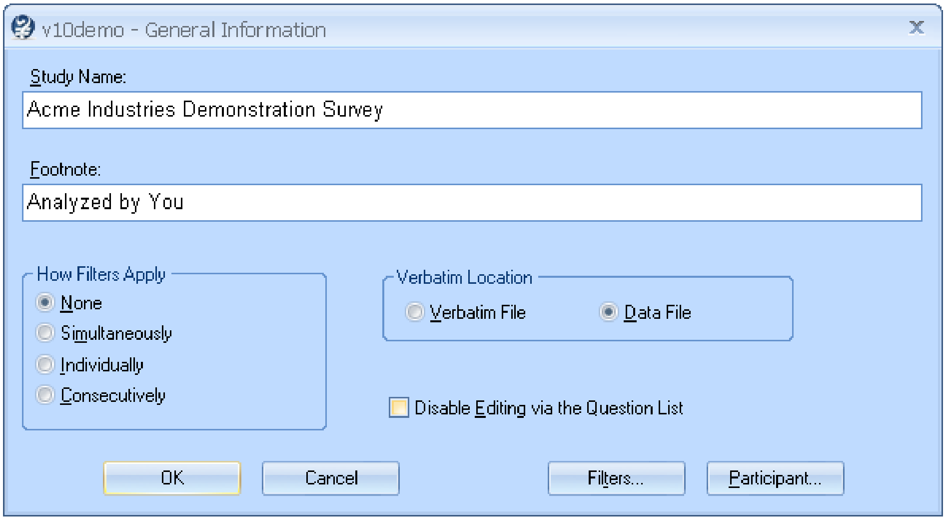
The **Save As** window will open.

➢ Enter "yourfilename" in the **File name** field. The Survey System will supply the extensions for all files you create.

ⓘ The main box in this window shows the names of all the existing files of the types with which you are working. Files with names that are variants on "v10demo" are supplied with this software. If someone else has used this copy of The Survey System, you may also see other file names.

➢ Click on **Save** to approve the file name and folder.

The **General Information** window will open.



The General Information Window

This window appears when you initially set up the Question File or if you later open it to edit your choices.

Study Name – This is a title that will appear by default at the top of reports and Web pages. This is not required but most researchers use one.

- Type in the study name "**My Own Survey**."

Footnote – A label that appears at the bottom of each table or chart.

- Type the footnote "**Prepared by: Yours Truly**." or leave it blank, if you do not want a label.

- Click **OK** to move to the **Question Instructions** window for **Question 1**.

The Question Instructions Window

Name - Every question must have a name. Names appear in some selection lists and as a header when viewing or exporting the data in spreadsheet format. If you leave this field blank, The Survey System will automatically add a name consisting of a “Q” and the question number, e.g. “Q 3.”

Kind of Question - This field offers seven choices (Statistics will be disabled if you do not have the Advanced Statistics Module). Your choice here will depend on the kind of question you plan to ask. This tutorial includes examples of the main kinds of questions.

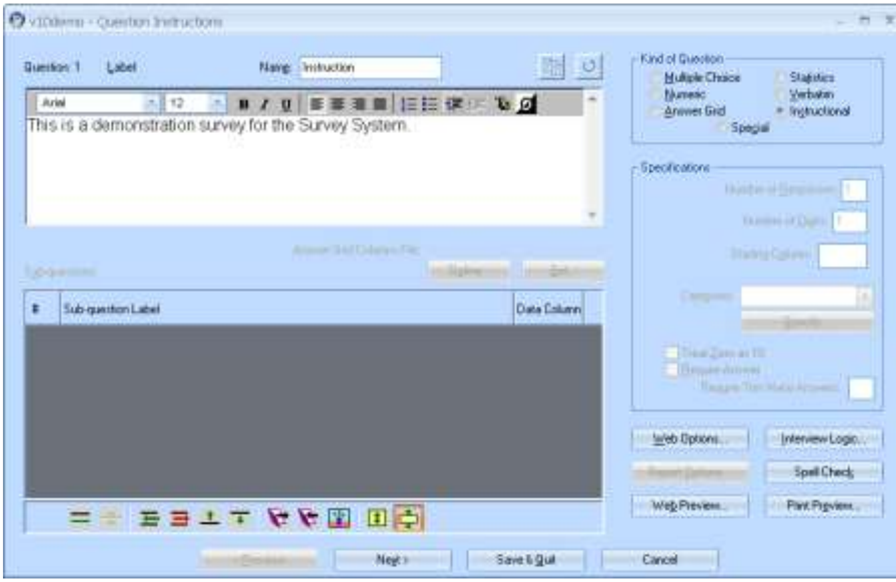
There is more information about **Kinds of Questions** in the help topic of that name. To reach it select Help on the Main Menu or click on one of the Kind of Question choices in this window and press the **F1** key. The PowerPoint tutorial on your CD shows sample questions you may find in a survey and which kinds of question to use for each.

Question 1: An Instructional Question

Instructional questions just present information to an interviewer or a respondent. They neither require nor allow an answer. You can use an instructional question for an introduction or instructions for a section of your survey.

The **Question Label** is the question you will ask and the label for any reports you will produce. Use the toolbar in the label box to change fonts, colors, etc. as in a word processor.

- Enter “Instruction” as the **Question Name**.
- Select Instructional as the **Kind of Question**.
- Enter “This is a demonstration survey for The Survey System” in the Question Label box.



Ignore the other options for this question. We will explain them in the next question.

- ➢ Click "Next" to move to the second question.

Question 2: A Multiple Choice Question

Multiple choice questions present labeled answer choices. They allow people to pick one or more choices, depending on what is appropriate for the question. This question allows people to pick only one choice.

Have you purchased an ACME product in the last year?

Yes
No

- ➢ Enter "Purchased Products" as the **Question Name**

- ➢ Select Multiple Choice as the **Kind of Question**.

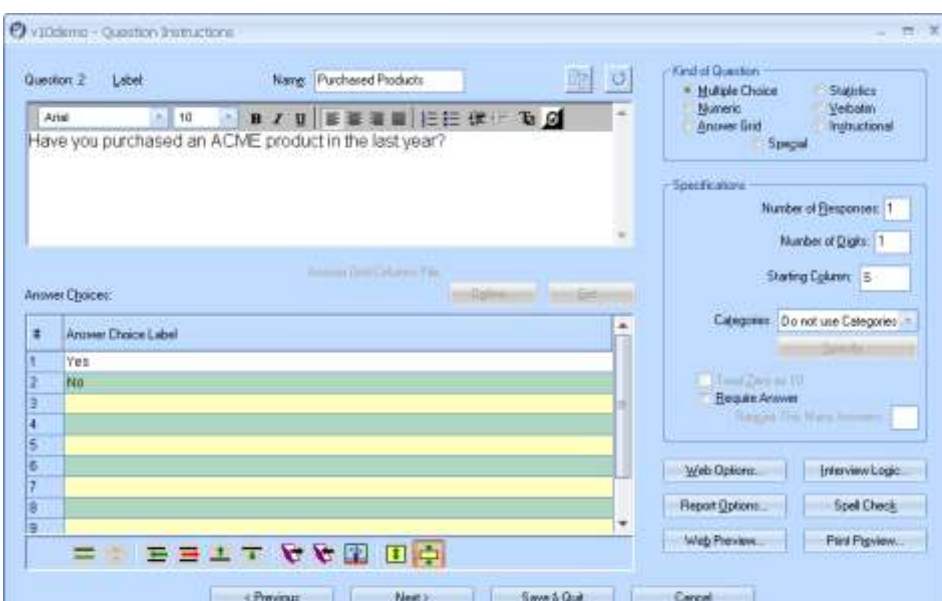
➢ Enter "Have you purchased an ACME product in the last year?" in the Question Label box.

Answer Choice Labels

The **Answer Choice Label** for each code can be up to 150 characters long (including punctuation and spaces). These labels will automatically wrap to fit on reports, or you can use the line break button in the toolbar to force a break at any point. When entering long labels, you can use the double height button to enlarge the space for each label.

➢ Enter "Yes" and "No" into the first two **Answer Choice Label** boxes.

ⓘ To move from label to label use the **Up** and **Down Arrow** keys, the **Tab** key or the mouse. *Do not* use the **Enter** key to move from line to line. It functions the same as **Next** in this window and will move you to the next question, whether or not you have finished entering your labels.



Specifications

The Specifications section of this window includes additional instructions for the question. Three of these determine how and where the data is stored in the **Data File**. Data Files hold the answers to your survey questions. Usually, you create this file with The Survey System by entering the answers to a questionnaire. You can also import data from an external source such as Access or Excel.

Number of Responses – *Means the number of different answers you will accept from* ***each*** *person*, not the number of answer choices available.

- We only want a"Yes" or "No" answer to this question), so enter "1."

Number of Digits – Determines the number of answer choices available. You can have up to 10 choices represented by single-digit numbers ("0" is used for 10), up to 99 choices with two-digit numbers, and up to 999 choices with three-digit numbers. The Survey System may change this choice automatically for you. For example, if the current number of digits is 1 and you add an eleventh answer choice, the program will change the number of digits to 2.

- Enter "1," if it is not already showing.

Starting Column – A Data File contains a number of **columns** or character positions. Each **data column** holds a single alpha-numeric character. For example a basic **Yes/No** type question will be stored in a single column with, , a "1" for "Yes" or a "2" for "No" in that column. The starting column defines where The Survey System will store the answers to this question in the Data File.

ⓘ Normally you can accept the default starting columns shown and **not worry about keeping track of them yourself**. The Survey System shows you the columns and lets you change them so that you can use data from programs that create fixed format ("flat") data files and to enable some advanced functions. If you wish to learn more about data columns see the **"**Questionnaires and Data Columns" help topic.

When shipped, The Survey System assigns the first four columns in each Data File as the **Questionnaire ID number**. This means that "5" is the default starting column for the first question

- ➢ Accept the starting column "5."

The rest of the features in this window page are covered briefly here (for more information, see the help topic for each choice by pressing the **F1** key while any choice is selected).

Categories –You can group answers into categories. For example, you could group states into regions.

Require Answer – Checking this box ensures that every person must answer this question before advancing to the next question.

Web Options – Presents choices on how this question will be treated in Web page surveys and reports.

Report Options – Presents choices on how this question will be treated when producing reports on your desktop.

Interview Logic – Controls the flow and appearance of questions in a telephone (CATI), PDA or Web survey through skips (branching), inserting previous answers (piping), randomizing question or answer choice order and so on.

Web Preview – Shows how this question will appear as part of a Web survey. This preview shows only the current question, without other elements that might appear on an actual survey page.

Spell Check – Spell checks the question and answer choice text of the question you are currently creating.

ⓘ It is usually more efficient to check the spelling of the entire Question File after entering all the questions.

Print Preview – Shows how this question will appear as part of a printed questionnaire form.

- Click "Next" to move to the third question.

Question 3: A Multiple Choice Question Allowing More Than One Response.

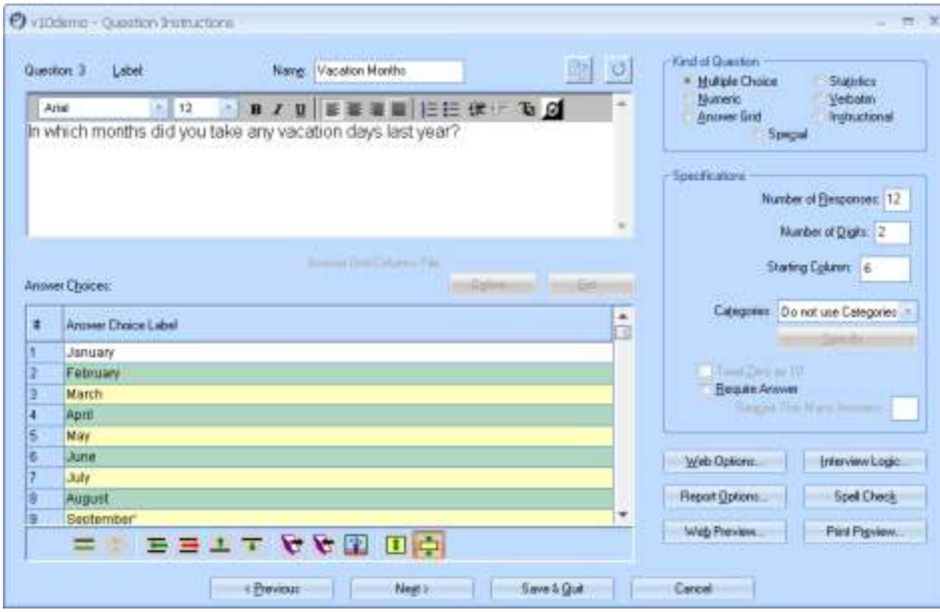
In which months did you take any vacation days last year?

January
February
March
April
May
June
July
August
September
October
November
December

- Enter "Vacation Months" as the **Question Name**.

- Select multiple choice as the **Kind of Question**.

- Type the label for **Question 3**: "In which months did you take any vacation days last year?"



Since the months are a common set of answer choices, we will save typing and copy them out of the answer library. This library is one of the features of the **Answer Choice Toolbar** that appears below the Answer Choice Label area.

- Click on .
- Then select Months from the choices that appear. The list of months will be copied as the answer choice labels.

You can save the current list of answer choices to the library using the  button. This feature is very convenient whenever you have to use the same list of choices over and over again.

The toolbar also has a variety of other functions. See the **Answer Choice Toolbar** help topic for details.

Specifications

Since people may have taken vacation days in more than one month, we have to allow each person to give multiple answers.

- While it is unlikely that anyone took vacation days in every month, we want to allow for the possibility, so enter “12” in the **Number of Responses** field.

Notice how the Number of Digits field automatically changed to “2,” because there are more than 10 choices.

The Starting Column field automatically changed to show “6,” since the previous question used column 5. You can usually just let the program change this field automatically. We show it to you to let you change it to meet special needs.

- Click on **Next** to go to Question 4.

Question 4: A Numeric Question

Numeric questions ask people to fill in blanks with numbers. The numbers are the *actual answers*, such as ratings, monetary amounts, percentages, or units of measure. This differs from multiple choice questions, in which numbers are codes that represent answers, such as “1” for “Yes” and “2” for “No.”

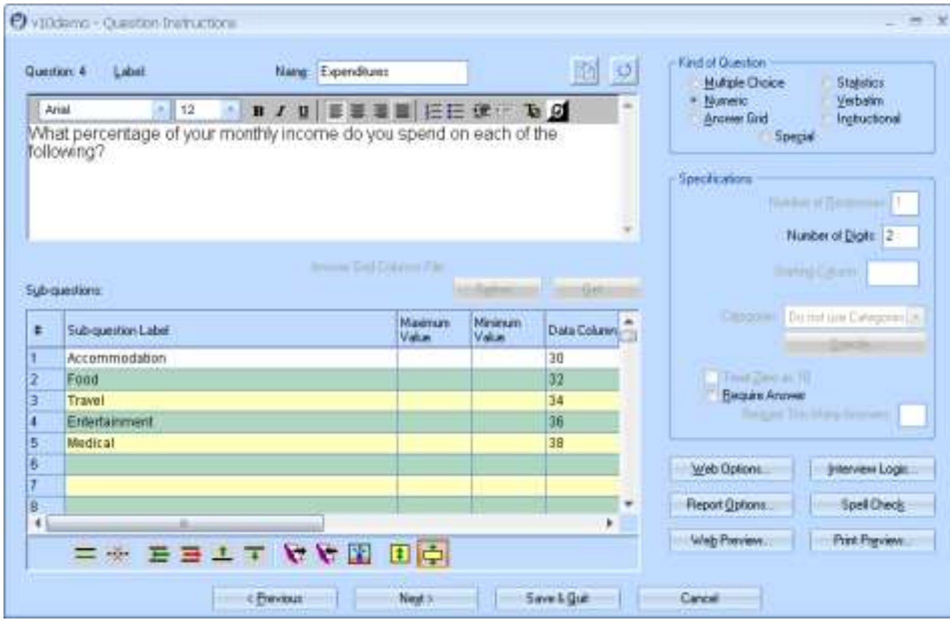
What percentage of your monthly income do you spend on each of the following?

Accommodation
Food
Travel
Entertainment
Medical

- Enter “Expenditures” as the **Question Name**.

- Select **Numeric** as the **Kind of Question**.

- Enter the **Question Label** as shown.



Specifications

- Specify "2" in the **Number of Digits** field. This will allow answers up to 99.

The **Starting Column** field is disabled for numeric questions, since they can accept answers to multiple sub-questions, as described next.

Sub-Questions

A Numeric question can ask for a single answer, for example "How many times did you eat out last week?" Or it can ask for separate answers to a series of related questions that will appear together, both when asked and when results are reported. Question 4 is an example of the latter. "Accommodation", "food", "travel", "entertainment", and "medical" will each get a separate answer. We call these related questions being grouped together **sub-questions**.

The Answer Choices section of the Question Instructions window is replaced by the **Sub-questions** section.

- ➢ Type “Accommodation” for the first **Sub-question Label**.

The next column to the right of the label column is labeled **Maximum Value**.

Maximum Value – If you enter a number in this column, The Survey System will not accept a higher number during data entry. If you leave it blank, the program will accept as large a number as can fit in the answer space (e.g., “99” will be the highest acceptable number when allowing two digits).

Minimum Value – If you enter a number in this column, The Survey System will reject a lower one during data entry. You can use a negative number as the minimum value. If you do not enter a minimum value, zero will be the lowest answer allowed.

The rightmost column is labeled **Data Column**. Since each sub-question gets its own answer, each is assigned its own unique position in the Data File. The Survey System will show a default data column number when you use the Tab key to move from the label to the maximum value column. If you leave the data columns blank, the program will automatically fill them in when you click on Next or Save & Quit.

- ➢ Leave the default data columns.

- ➢ Type ”Food”, “Travel”, “Entertainment”, and “Medical” as the labels for sub-questions 2-5.

ⓘ We could use a logic instruction to ensure that percentages add to 100, but in this case typical answers will not add to 100, since there are other categories of expenses not mentioned.

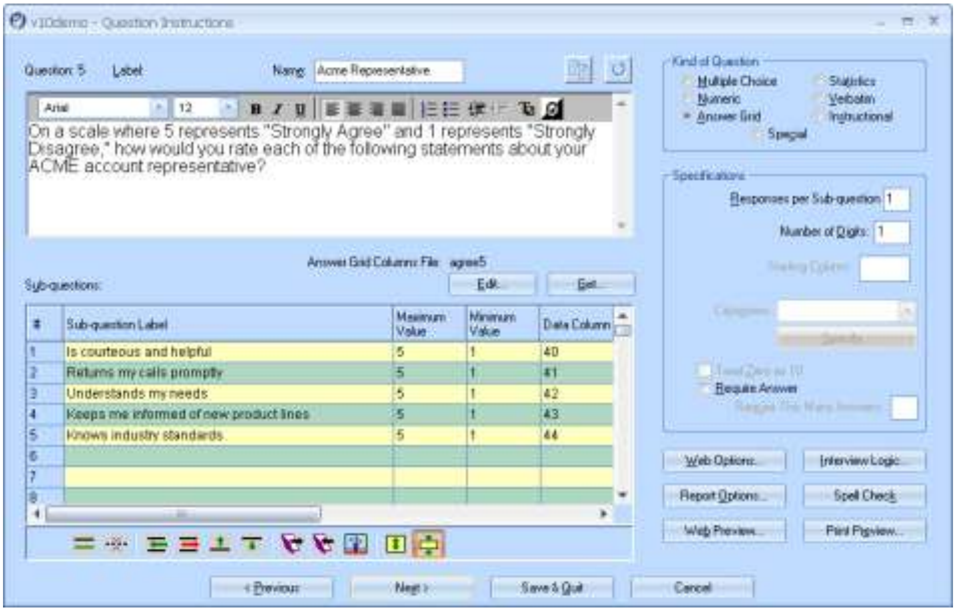
You may have up to 100 sub-questions in one question. When you want only a single answer, as in our “How many times did you eat out” example, you can leave the sub-question label blank if you wish.

Question 5: An Answer Grid Question

Answer grid questions show labeled answer choices and results in a grid or matrix format. This is a compact way of presenting a group of related questions that all have the same answer choices. This is a common format for rating and agreement questions, such as our fifth question:

> How much do you agree or disagree with each of the following descriptions about your ACME representative?
>
> Is courteous and helpful
> Returns my calls promptly
> Understands my needs
> Keeps me informed of new product lines
> Knows industry standards

- ➢ Enter "Acme Representative" as the **Question Name**.
- ➢ Select **Answer Grid** as the **Kind of Question**.
- ➢ Enter the **Question Label** as shown.



Specifications

- The **Number of Digits** field defaults to the same number as the previous question. Change it to "1," since we are only allowing the numbers 1-5 as answers to this question.

Sub-Questions

Answer grid questions show the related questions as the rows of the grid and the answer choices as the columns. Answer grid questions have a **sub-question** section rather than an answer choice section, just like numeric questions.

- Type "Is courteous and helpful" for **Sub-question Label #1**.

When using Data/Interview to enter answers, as we will in the next chapter, you have the option of entering answer grid question answers either by typing in code numbers that represent the answers or by selecting cells in a grid. If you are typing in numbers, the Maximum and Minimum Values fields apply just as they do for numeric questions. These fields are not needed when you are selecting cells in a grid, since you can only select valid choices in a grid. Web page and PDA surveys always present these questions in the form of a grid. We can leave these fields blank, since we will be using a grid when we enter our example answers in the next chapter.

- Enter the labels for sub-questions 2-5, accepting the default Data Column suggestions from The Survey System.

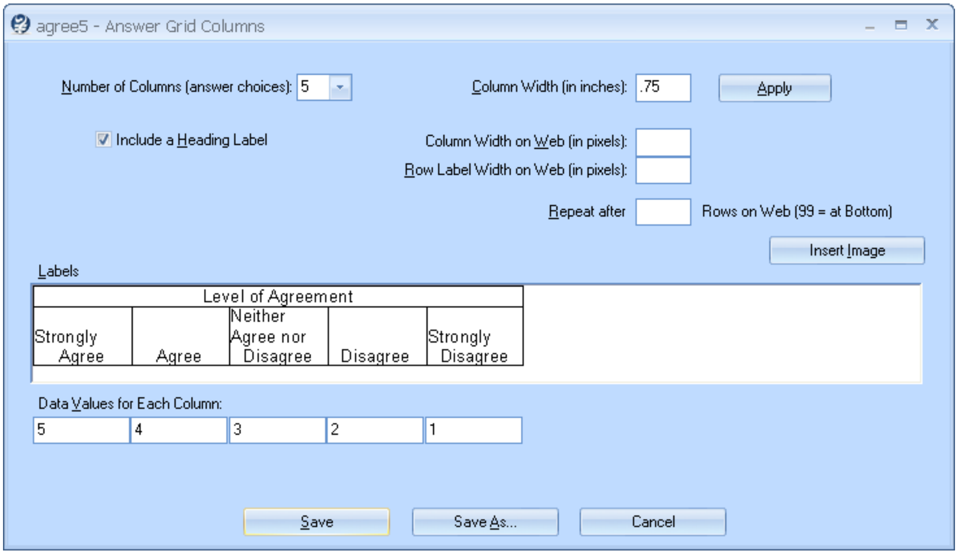
2. Returns my calls promptly
3. Understands my needs
4. Keeps me informed of new product lines
5. Knows industry standards

Column Labels and Value Definitions

Answer grid questions need column labels to show the answer choices in a grid format. These labels are stored in separate Answer Grid Column Files. This makes it easy to use the same labels for multiple questions in different surveys. In the center of the window you will see two buttons near the label "**Answer Grid Columns File**."

- Click on the **Get** button beneath it and select "Agree5," if it appears as a choice. This is one of several Answer Grid Columns Files supplied with The Survey System.

- If that file appears, select it and then use the **Edit** button. If that file does not appear, cancel out of the Open window and use the **Define** button. Both choices will take you to the Answer Grid Columns window.



- If you used the Define button, enter the information shown in the illustration.

- Save the file.

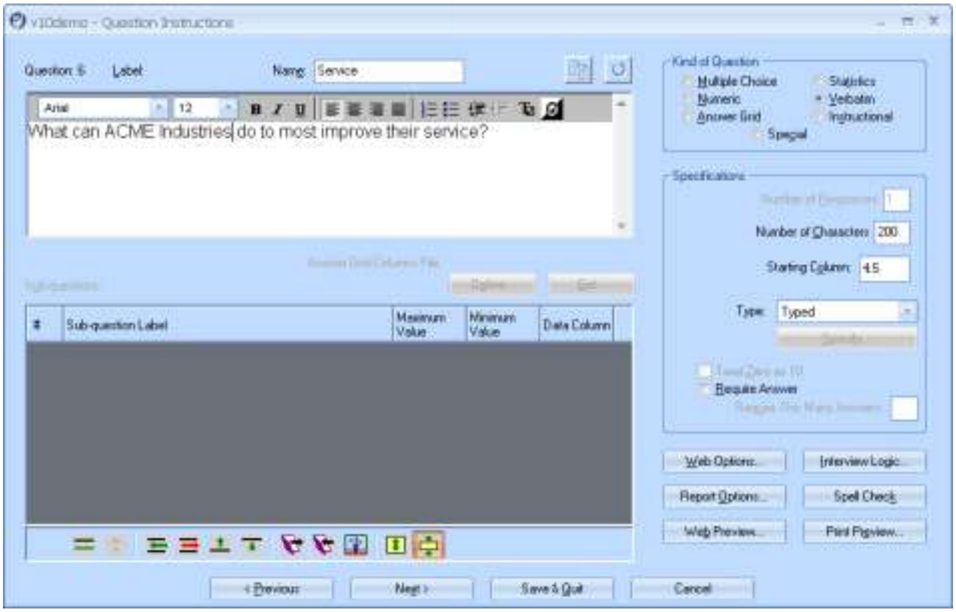
- Click Next to move to the next question.

Question 6: A Verbatim Question

A verbatim asks for a text response. Some researchers call them "open ended" questions, because people can say or type whatever they wish as the answer.

What can ACME Industries do to most improve their service?

- Enter "Service" as the **Question Name**.
- Select Verbatim as the **Kind of Question**.
- Type the above question into the Question Label box.



Specifications

Number of Characters – Use this field, which replaces the Number of Digits field, to specify the maximum number of characters you will allow in answers to this question.

- Enter “200.”

Type – The Survey System can either let people type the answers to verbatim questions, or it can record peoples’ answers in their own voices in telephone or PDA surveys. Recording spoken answers requires the optional Voice Capture Module. If you have that module this choice will be enabled.

- If this choice is enabled, choose Typed.

- Click Next to move to the next question.

Copying Questions

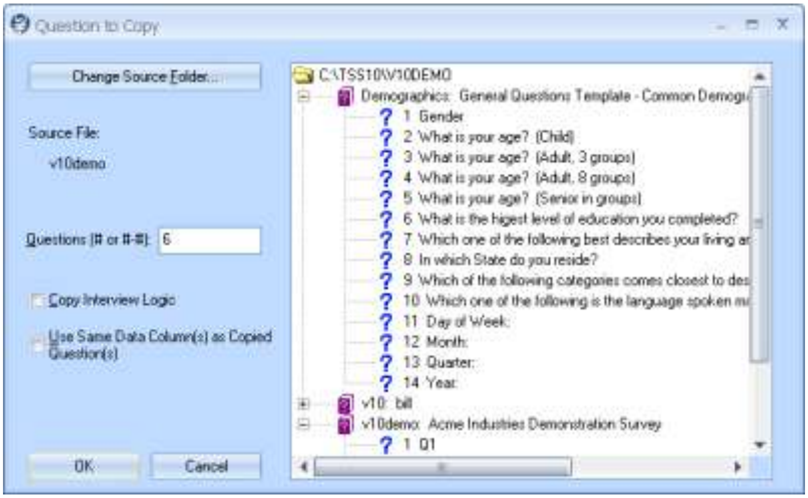
The Survey System can show how different kinds of people answered your questions. To demonstrate this, we will add two demographic questions to use for this purpose. **Question 7** asks for the gender of our respondent and **Question 8** asks their age.

Question 7: Gender

“What is your gender?**”** is a question that appears in many surveys. To save you typing, we supply a number of common questions in Question Files that are installed with The Survey System. We will copy this question from one of those files.

- Click on the **Copy a Question** Button  located to the left of the Kind of Question box.

The Question to Copy window will appear:



The symbols in the big box represent Question Files. Lines with that symbol show the file name followed by the study name. The symbols represent individual questions.

- Click on the **plus sign** (+) at the left of the line that starts "Demographics" to expand the list of questions in that file.
- Leave all three choices on the left side of the Question to Copy window blank.
- Double-click on "**What is your Gender?**"

Double clicking will close the window and import the selected question to the Question Instructions window. Later, you can return to the Question to Copy window and press the F1 key or search for the Copying Questions help topic to learn about all the options in this window.

- Since we do not need to make any changes to this question, click on **Next**.

Question 8: Age Group

The last question in this first study is "What is your age?" This is also found in the same demographics file. If this question had immediately followed the gender question, we could have copied both in a single step. Since they are not adjacent, we have to return to the Question To Copy window to copy it.

- Click on the **Copy a Question** button.
- The Demographics Question File will probably already be expanded. If not, click on the plus sign to its left.
- Double click on "**3 What is your age? (Adult, 3 groups)**"

This time we want to edit the question label.

- Delete "(Adult, 3 groups)" from the label in the Question Instructions window.
- Click **Save & Quit** to return to the **Question** sub-menu.

You have now entered the instructions for all the questions in the tutorial survey. Later we will show how to import a survey from a Word, RTF or TXT file.

The Question List

Now that you have left the Question Instructions window, please note that a **list** of the questions you entered appears in the right side of the main program window. This list has many uses. You can:

- Double-click on a question to edit it.
- Right-click on a question to bring up a menu that lets you edit it, delete it, insert one or more new questions before it, enter logic to control the flow of an interview or survey or see a quick report of the answers to the question.

- Bring up the same menu for the highlighted question by pressing the enter key.

- Right-click below the last question in the list to add new questions to the file.

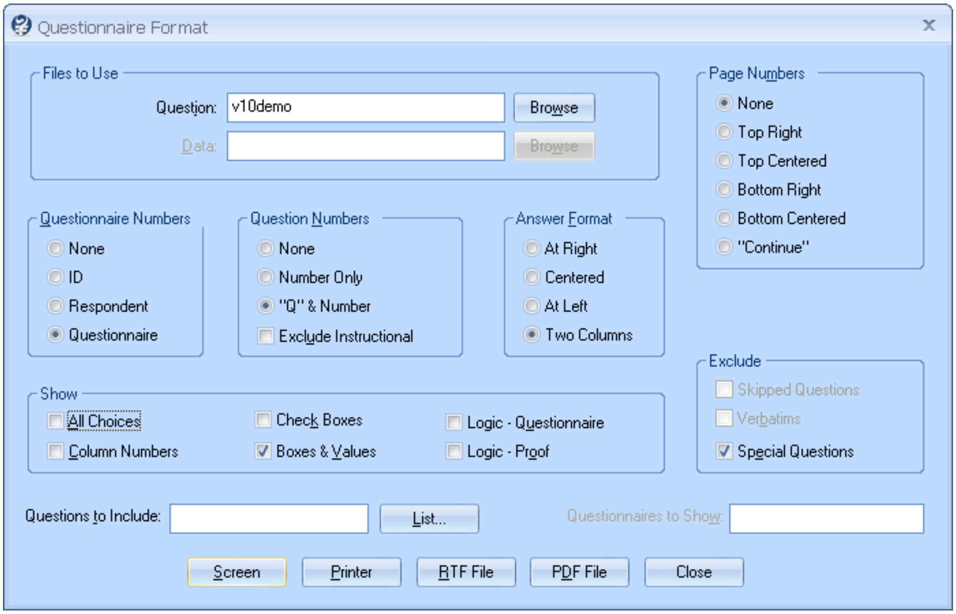
- Move a question to a different place in the list by dragging it to a new position.

You can change the share of the window devoted to the list by dragging the vertical bar separating the list portion of the window from the darker portion.

Producing a Questionnaire Form

The **Report/Questionnaire Forms** section of The Survey System produces a blank (unused) questionnaire form similar to the one at the start of this chapter. You can use this form for a paper survey or as a handy reference for a survey. You can also produce questionnaire forms **Showing Answers** given by individual respondents or an **Answer Summary** showing what percentage of people picked each choice. The latter is the most compact way to summarize a survey.

- Select **Report/Questionnaire Form/Blank** from the main menu.



All three types of questionnaire forms use this window. Some options will be disabled, depending on the type. A description of all the options is beyond the scope of this tutorial. You can use the F1 key to learn about each choice.

- Make selections as shown above to produce a form that looks like the questionnaire on page 2-3.

You have now completed Entering Questions! The next section of the Tutorial, Entering Answers, will guide you through desktop data entry.

You can use the Question File created in the previous chapter to enter answers into The Survey System in several ways: You can create a Web page survey (as we do in a later chapter), a PDA/smartphone survey or you can type answers directly into The Survey System.

This part of the tutorial takes you through the last method - **Interview Style** data entry. It is essential for people doing telephone surveys or manually entering data from paper questionnaires. If however, you will only conduct Web or PDA surveys or import data from other sources, you can skip the rest of this chapter and go to **Producing Reports**. See the **Importing Data Files** help topic, if you want to import data from another source.

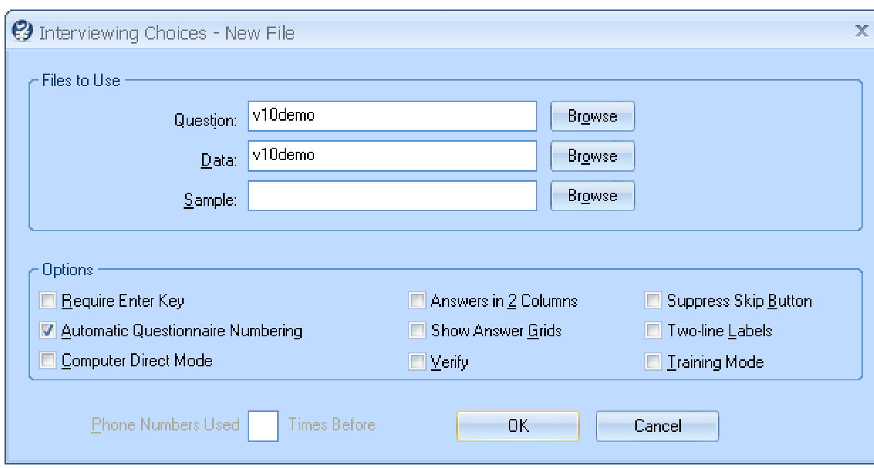
Chapter 3: Entering Answers

Creating the Data File

The Survey System stores the answers to your survey questions in a **Data File**.

- ➢ Select **Data/Interview/New** from the Main Menu.

The **Interviewing Choices** window will open:



Interviewing Choices

Files to Use

The **Files to Use** section includes fields labeled **Question** and **Data**. The Survey System uses the Question File to show the questions and answer choices on the screen and the Data File to store the selected answers.

- ➢ The Question File you created in our example ("yourfilename") should appear as the default in the **Question File** field. If not, type it in.

- Press **Tab** to go to the **Data File** field and type in "yourfilename."

You may use the same name for both the Question File and the Data File, because they are *different types* of files but for two files of the *same type*. The Survey System automatically adds extensions to file names to differentiate the types of files (e.g., ".qes" for Question Files and ".dat" for Data Files).

ⓘ If your edition of The Survey System includes the optional CATI Module, a **Sample** field will appear. We are not using Sample Files in this tutorial. See the **Sample Management** and **Automatic Quotas** help topics for more details.

Options for Interview Style Data Entry

The **Options** section offers choices that affect the interview screen, the interview process, and the Data File you create. We will use three of them. You can use the F1 key to read about the others, if you wish.

Require Enter Key – This check box determines whether or not you must press the **Enter** key after entering each answer. Using this key slows data entry, but allows you to check what you have entered before moving on to the next question. We recommend that new users use this option when first learning the program. Later, you can save time by not using this key.

- Check the **Require Enter Key** box.

Automatic Questionnaire Numbering – This feature is checked by default. It tells The Survey System to automatically number each questionnaire you enter**.**

ⓘ The only reason *not* to use automatic numbers would be if you are entering data from paper questionnaires that already have non-consecutive identification numbers.

- Leave the **Automatic Questionnaire Numbering** box checked.

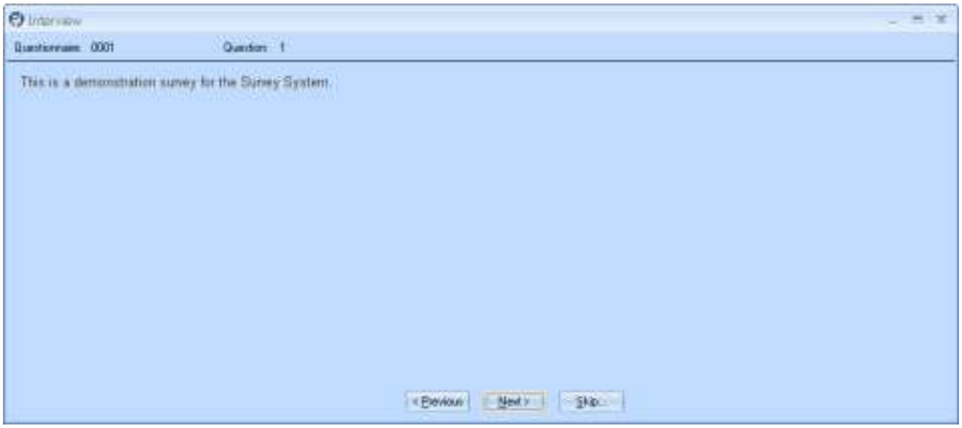
Show Answer Grids – When this feature is checked, the Interview window displays Answer Grid Questions in actual grids on the screen. Otherwise, they are displayed in the same way as numeric questions, with question labels next to fields for entering numbers that correspond to the choices. Grids are easier to read on-screen, but require using a mouse to select the answers, which is slower than using the keyboard.

- Select this choice.
- Click **OK** to open the **Questionnaire Number** window.

The **Number for First Questionnaire** field is where you will specify the number to use as the number for the first questionnaire. Usually, you will use the default of "1."

ⓘ Questionnaire numbers are four digits long unless you edit the default in the **Options** Windows (see the **Questionnaire Number Length** help topic). You need not enter leading zeros, as the program will automatically expand "1" to "0001."

- Leave the default of "1" and click **OK** to open the **Interview** window.



Entering Data in the Interview Window

At the top of the interview window are the **Questionnaire** and **Question** numbers. Below that is the question - “This is a demonstration...”

- As this question is instructional, it does not require an answer, so simply press the **Enter** key or click on the **Next** button to continue.

Question 2

The next question “Have you purchased an ACME product in the last year?” and its possible answer choices appear. There are two ways you can enter answers to Multiple Choice questions. You can either click on the answer choice label or enter the code number of that choice in the **What is the Answer** field.

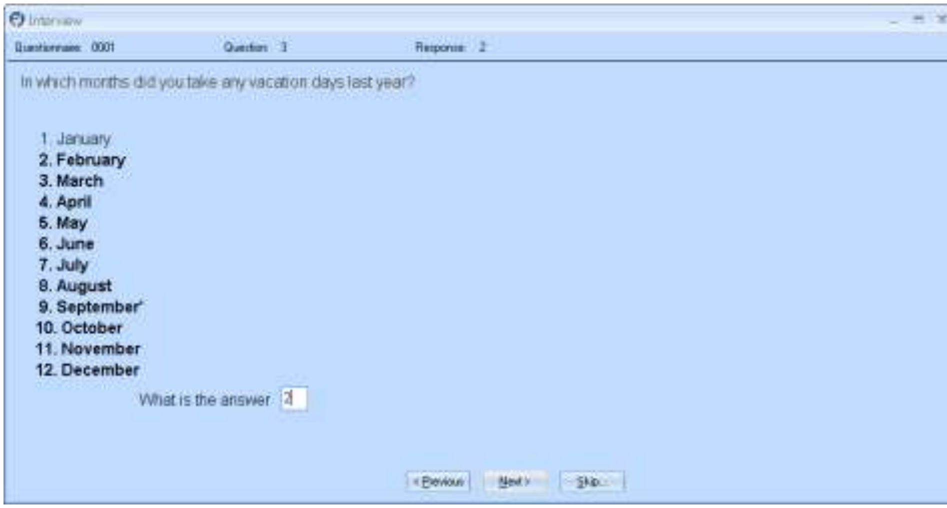
- Enter “1” as the first person's answer to **Question 2** by typing “1” or by clicking your mouse on the word “**Yes**.”

ⓘ If you checked the **Require Enter Key** box in the **Interviewing Choices** window (as per directions), you must hit the **Enter** key or click on **Next** to move to the next question, otherwise the program automatically takes you to **Question 3** after you enter the answer for **Question 2**.

ⓘ If you make a mistake with a question, click **Previous** or press the **Esc** key to go back to and edit the question.

Question 3

Question 3 allows more than one response per person. The Survey System helps you keep your place by displaying the number of the response to enter at the top of the window.



- Enter “1” or click on the first item “January.” Then click on the **Next** button or hit **Enter**.

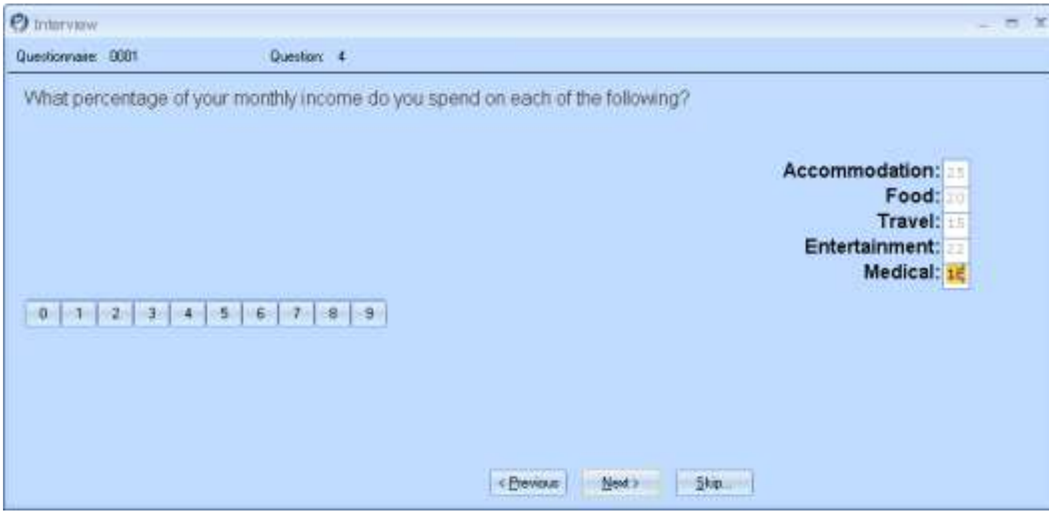
ⓘ In the Interview window, “January” dims after you select it. This feature helps prevent selecting the same item more than once in questions that allow multiple responses. Note that it is not necessary to enter the answers in numerical order (i.e., you could enter answers 3,2,4 in that order).

- Select “2” as the second response either by typing in the number or clicking on the word “February.” Then click **Next**.

- This person did not give a third response. Click **Next** (or press **Enter**) again to move to **Question 4**.

Question 4

Question 4 is a Numeric Question asking what percentage of your monthly income you spent in different categories.



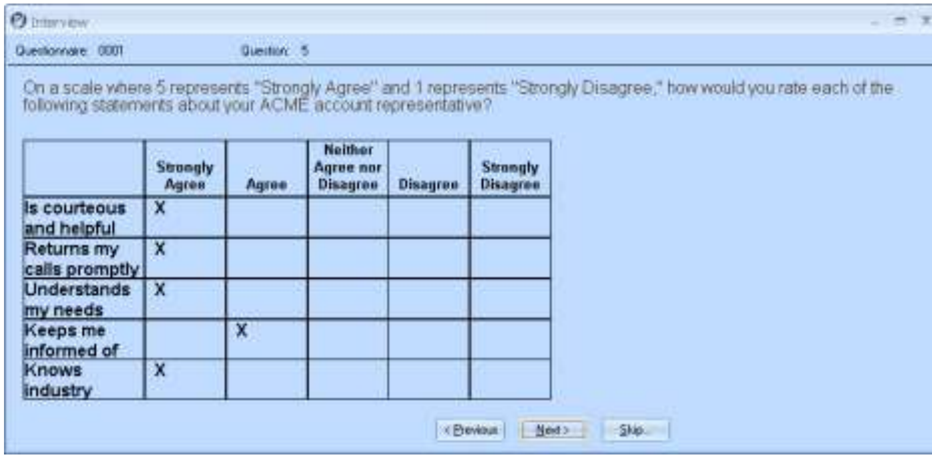
You can enter answers by clicking on values in the number pad shown in the window or by typing them. If you did not check Require Enter Key, the program will automatically go to the next sub-question when the answer space is full. If you did not check that choice, you must use either the **Enter** key, the **Next** button or the **Down Arrow** key to move to the next sub-question. You can use the **Esc** key, the **Previous** button or the **Up Arrow** key to go back to a previous sub-question.

➢ Enter the following values for Questionnaire #1: 25, 20, 15, 22, 18. Then click on **Next**.

Question 5 is an Answer Grid question with five sub-questions. The interview window shows the question label and the sub-question labels. Select answers by clicking on grid cells.

If you selected Show Answer Grids, the sub-questions will appear in a matrix layout to let you enter data by clicking your mouse in the relevant cell. This is often easier, but slower than using the numeric keypad.

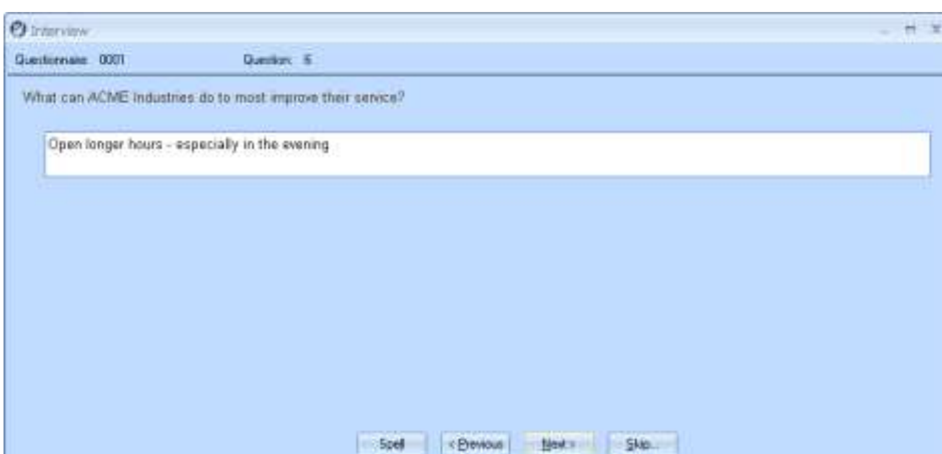
➢ Select the choices shown by clicking in the cells.



Question 6

Question 6 is a verbatim question.

➢ Type in "Open longer hours – especially in the evening".



Question 7

“What is your gender?”

- Select “Male” (“1”).

Question 8

“How old are you?”

- Select “35-49” (“2”).

When you finish entering the data for each questionnaire, the program will ask if you want to “**Continue with another questionnaire?**”

- Choose **Yes**.

- Enter the answers for questionnaires 2 through 10 shown in the chart on the next page.

The chart of questionnaires 1-10 shows alpha codes representing the answer grid column labels for the Acme Rep question, with a key below the codes (e.g. “sa” = “strongly agree”). Note the blank spaces in the chart indicate that the respondent did not give as many answers as allowed.

ID	Buy	Vacation Months						Expenditure					Acme Representative					Service	Sex	Age
1	1	1	2					25	20	15	22	18	sa	sa	sa	a	sa	Open longer hours - especially in the evening	1	2
2	1	7	9	11				10	12	20	28	10	a	d	a	a	sa	Their credit department is very inefficient	1	2
3	1	7	8					0	0	35	25	30	n	sa	sa	a	a	I can never get any information from the credit department	2	1
4	2	10	11	12	1			30	20	15	5	20	a	sa	n	a	sa	Need to keep more up to date with market trends	1	2
5	1	1	3	5	7	9	11	12	17	11	20	30	n	sa	n	a	n	Their deliveries are erratic	2	1
6	1	3	7	11	12			17	15	18	25	15	a	a	a	a	a	When I got married they cancelled my account	2	1
7	2	6	7	8				17	22	25	10	16	d	sa	a	n	a	It's impossible to park near their Washington St. store	1	3
8	1	11	12	1				19	28	23	15	5	sa	sa	sa	sa	sa	It's a pleasure to do business with them	1	1
9	2	10	11					0	25	25	20	20	sa	a	sa	n	a	Their credit policy is very harsh for younger people	2	2
10	1	3	4	5				30	20	10	15	15	a	n	sa	a	sa	They never have the sizes I want	1	3

sa= strongly agree = 5
a = agree = 4
n=neither = 3
d=disagree = 2
sd=strongly disagree = 1

- Press **Enter** to leave an answer blank and move to the next question or sub-question.
- After you have entered the tenth questionnaire, select **No** when the program asks if you want to "Continue with another questionnaire."
- Select **No** again when it asks if you want to enter more data. This will return you to the **Data/Interview** menu.

ⓘ **You have now finished entering all the data for the first survey.**

Viewing the Entire Data File

In order to make sure the data you have just entered matches the template you were following, we will show you how to view the "raw" data.

- Select **Data/View Data File/by Question** or use the icon 123.

The View window shows the values we assigned to the answer grid columns instead of labels or alpha characters for the Acme Representative question. The key below the question in the chart on Page 9 shows the numbers than correspond to the alpha codes in the chart.

- Check your View window against the answers shown in the chart, and fix any discrepancies. After making any necessary changes, click **Save**.

You can use the **Change Column Widths** button to widen all columns to better see their labels. You can also drag individual columns to widen them. Use the F1 key to learn about searching for specific answers and other features of the View window.

ⓘ **You have now completed the Entering Answers tutorial! The next section, Producing Reports, will guide you through producing reports and graphs using the Question and Data Files you have created**.

Chapter 4: Producing reports

In **Producing Reports**, you will:

- Produce basic reports.
- Create and use demographic banners (crosstabs) on reports.
- Alter the appearance of reports by using a Format File.
- Produce charts.

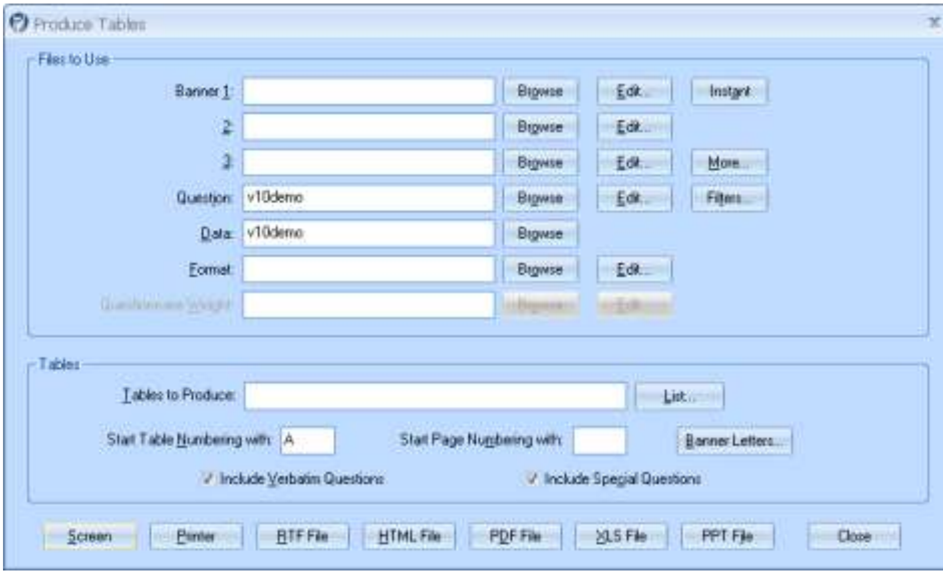
Producing Basic Reports

You are now ready to produce your first reports based on the questions you created and the data you entered. There are several kinds of reports you can produce. The most common is a **Table**.

ⓘ To avoid confusion, we use the term "question" when we talk about creating instructions and the term "table" when we talk about a report based on a question.

➢ Select **Report/Tables** from the main menu.

The Produce Tables window will open.



Files Used to Produce Tables

The first section of this window is **Files to Use**. Any files you have been using will appear as defaults.

ⓘ To change a default file, move to the field you want to change and either type in the new name or click on the **Browse** button and select the correct filename.

Question and Data Files are the only files *required* to produce a table.

➢ Enter the names of the Question and Data Files you created, if they do not already appear for each. If you skipped creating either of these files, you can use the “V10demo” supplied files instead.

All other types of files in the **Files to Use** section are optional. They include:

Banner 1, 2 and 3 – Banners show demographic information (e.g., gender, income, department, etc.). You can specify up to three banners in this window and click on **More …** to specify up to a total of nine banners.

Format – These files customize the content and appearance of your tables.

Questionnaire Weight – Weighting lets some people count more than others as a way top compensate for differences between your sample and the target population. This feature is disabled unless you check Allow Questionnaire Weighting on the Utilities/Options/Table Content page. We suggest only experienced researchers use this feature. See the Help File for details.

We will not use any optional files at this time. We discuss and create Banner and Format Files later in this tutorial. If this copy of The Survey System has been used before, file names may appear in other fields. If so, please delete them. They appear because the program saves the names of the most recently used files as a convenience.

While in the Produce Tables window, you can edit any of the files (except the Data File) by clicking on its corresponding **Edit** button. The Survey System will save your changes. After editing a file, you can return directly to the Produce Tables window. This feature saves time when you want to make a quick edit and continue producing tables.

Notes on Optional Files

Instead of specifying optional files in the Produce Tables window, you can use the Report Options button in the Question Instructions window to assign files for individual questions. In this way, different options can apply to different questions while you produce tables from all your questions at the same time.

If you specify a file in the Produce Tables window and have previously specified file(s) of the same type in the Question File, the one(s) you enter here will *override* the one(s) specified in the Question File. This feature lets you temporarily change some aspects of your tables without having to edit the Question File.

Specifying the Tables to Produce

Tables to Produce – Enter the numbers of the individual questions you want produced as tables. You can also use ranges, e.g. "1, 4-7" to produce tables 1, 4, 5, 6 and 7. Alternatively, leave this field blank to produce all tables.

If you do not know the numbers of the questions you want to produce, click on **List** to display the questions and select the ones you want.

Start Question Numbering with – The default of **A** in this field is short for "**A**s in the Question File." This matches the question numbers in the Question File to the table numbers. A number in this field will be applied to the first table produced and incremented for later tables. If this field is left blank, The Survey System will not number the tables.

- Leave the default of **A**.

Start Page Numbering with – This field lets you number the pages in the report.

- Leave the **Start Page Numbering** field blank.

Where to Produce the Tables

At the bottom of the Produce Tables window are command buttons labeled: **Screen**, **Printer**, **RTF File, HTML File, PDF File, XLS File, PPT File** and **Close**.

ⓘ Note that you must have Excel on your PC to produce XLS Files and PowerPoint to produce PPT Files.

- Click **Screen** to produce the tables on the screen.

The Produce-Progress Record window will appear while the data is being processed. If you have followed all steps correctly, the table on your screen will look like the **Table 2** shown below. Note that Question 1 will not appear as a table, because it is an instructional question.

My Own Survey

Table 2: Have you purchased an ACME product in the last year?

	Total
Base	10
Yes	7 70%
No	3 30%

Analyzed by You

The number under "Total" (10) shows how many people have answered the question. The rows show the distribution of the answers.

ⓘ The **Edit** button lets you modify the table in a built-in word processor on screen before printing or saving it in a file. Changes made here affect only the *current* report, not the Question File used to produce the report. If you want to produce reports later that reflect a change, you must edit the Question File itself and make the change there.

➢ Click **Next** to see **Table 3** on the screen.

My Own Survey

Table 3: In which months did you take any vacation days last year?

	Total
Base	10
January	4 13%
February	1 3%
March	3 9%
April	1 3%
May	2 6%
June	1 3%
July	5 16%
August	2 6%
September	2 6%
October	2 6%
November	6 19%
December	3 9%

Note that Table 3 shows "13" as the percentage for January. This is the percentage of all the *answers* to this question that mentioned January (i.e., 4 out of 32 answers = 13%, not that 13% of the people took a day in January). Later we will use a Format File to show the percentage of *people* who picked each choice (40% in this case) instead.

➢ Click **Next** to see **Table 4** as shown in below.

My Own Survey

Table 4: What percentage of your monthly income do you spend on each of the following?

	Total
Base	10
Accommodation	16
Food	18
Travel	20
Entertainment	19
Medical	18

Analyzed by You

The numbers on a numeric table represent the **Mean** (or "average") of the answers given for each sub-question. In this case the means are rounded to the nearest integer. To show them with one or two decimal places you must use a **Format File**. Format Files are discussed later in this tutorial.

➢ Click **Next** to see **Table 5.**

My Own Survey

Table 5: How much do you agree or disagree with the following statements about your ACME representative?

	Total	Level of Agreement				
		Strongly Agree	Agree	Neither Agree nor Disagree	Dis- agree	Strongly Disagree
Is courteous and helpful	10 100%	3 30%	4 40%	2 20%	1 10%	0 0%
Returns my calls promptly	10 100%	6 60%	2 20%	1 10%	1 10%	0 0%
Understands my needs	10 100%	5 50%	3 30%	2 20%	0 0%	0 0%
Keeps me informed of new products	10 100%	1 10%	7 70%	2 20%	0 0%	0 0%
Knows industry standards	10 100%	5 50%	4 40%	1 10%	0 0%	0 0%

Analyzed by You

Table 5 is an answer grid table. In this case the upper number in each cell is the frequency and the lower number is a row or horizontal percentage. For example, the “3” in under “Strongly Agree” in the “Is courteous and helpful” row means that 3 people strongly agreed with that statement. The “30%” below the 3 means that 30 percent of the answers in that row were “Strongly Agree.”

- Click **Next** to see **Table 6**.

This is a verbatim report showing the responses to an open-end question. Verbatim reports are included when you use the Produce Tables window, if the Include Verbatim Questions box is checked.

My Own Survey

Table 6: What can ACME Industries do to most improve their service?

Open longer hours - especially in the evening

Their credit department is very inefficient

I can never get any information from the credit department

Need to keep more up to date with market trends

Their deliveries are erratic

When I got married they cancelled my account

It's impossible to park near their Washington St. store

It's a pleasure to do business with them

Their credit policy is very harsh for younger people

They never have the sizes I want

Analyzed by You

- Click **Cancel** to return to the Produce Tables window.

You have just produced your first tables. We will now show you how to produce tables using banners to get much more information out of your data.

Banners - Seeing How Different Kinds of People Answered the Questions

All tables in The Survey System automatically include a total column that shows the answers from all the people who answered the question. The most common way to see how different groups of people answered the questions is to have additional columns that show each group. This group of additional columns is called a **banner (**similar to a crosstab, but more flexible).

The Survey System offers two ways to add banners to your tables. One way is to tell the program to use a question in the Question File as an **“Instant”** banner. The other is to create a **Banner File**. The first method is quick and easy, but has limitations. The second involves more work, but is much more flexible. We will show you both methods.

Instant Banners

Now we will see how men and women answered the “products purchased” question (Question 2).

- If you are not at the Produce Tables window, select **Report/Tables** from the main menu.
- Click on the **Instant** button to the right of the **Banner 1** field.

The word “**INSTANT**” will appear in the in the **Banner 1** field. This creates an instant banner using the Question File.

- Type “2” in the **Tables to Produce** field and click **Screen** to produce the table on the screen.

This will open the **Question to Use as Banner** window.

- Enter “7” in the **Question** field and click **OK**.

The program will report that it is working on **Table 2** and then display the following table.

My Own Survey

Question 2: Have you purchased an ACME product in the last year?

	Total	What is your gender?	
		Male	Female
Base	10	6	4
Yes	7 70%	4 67% 57%	3 75% 43%
No	3 30%	2 33% 67%	1 25% 33%

Analyzed by You

- Click **OK** to leave the **Tables** window and click **Close** to exit the **Produce Tables** window.

Banner Files

Instant banners can include only one variable (one way of classifying people). The Survey System automatically creates the column labels from the answer choice labels. To put more than one variable in a banner or edit the heading and column labels, you must create a Banner File.

Using a Banner File gives you much more flexibility than using an instant banner. The Survey System can create three kinds of Banner Files: **Standard**, **Answer Grid**, and **Multi-total**.

Standard banners are the most common. They show how different groups of people answered your questions and are similar to the instant banner used earlier to show how men and women answered Question 2. Other kinds of banners produce different kinds of summary tables. The **Types of Banners** help topic has detailed information on all types of banners.

Creating a Banner File

A Banner File contains general instructions and one or more **headings**. A heading is a way to classify the people who answered your survey. Gender is an example. A heading has one or more **columns**. A column shows the answers given by a particular group of people, such as male.

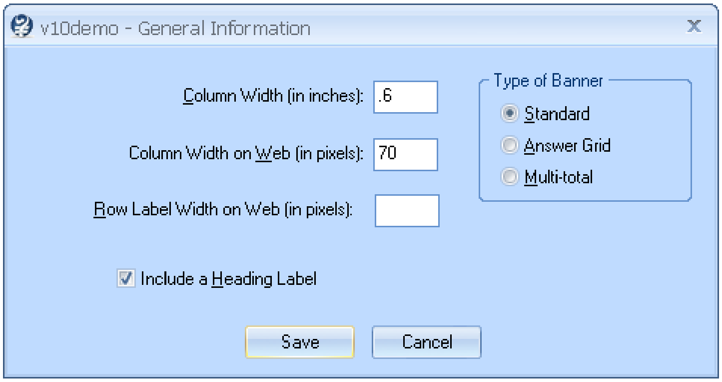
We will create the instructions for the following banner:

		SEX/AGE SUMMARY					
GENDER		MALE			FEMALE		
Male	Female	18-34	35-49	50+	18-34	35-49	50+

- Select **Instructions/Banner/New** from the main menu.

- In the Save As window, type "Yourfilename" in the **File name** field and click **Save**.

The General Information Window for Banners



The instructions in the General Information window apply to the entire Banner File, not just to an individual heading.

Column Width – This choice determines the width of your banner columns. All banner columns in a single Banner File will be the same width. The narrower the columns, the more you can fit on a page. The wider the columns, the more space you have for longer labels. Specify the width in inches or millimeters as shown (see the **Units Of Measurement** help topic to switch units).

- Enter ".6" (or "15" if "in millimeters" appears).

Column Width on Web – This specifies the width in pixels of banner columns used to produce Web reports. 60-80 pixels is a good start.

Row label Width on Web – Use this field to specify the width of row labels on Web reports. The row label width for desktop tables is specified in the Fonts and Page Setup window.

Include a Heading Label – If you check this box, the banner will have space for heading labels (e.g. "Gender") above the column labels.

- Check the **Include Heading Label** box.

- Leave the default of **Standard** as the **Type of Banner** choice.

- Click **Save** to open the **Banner Heading** window for **Banner Heading 1**.

Instructions for Banner Heading 1

The top of this window shows the number of banner columns available to add to this Banner File. This number represents the capacity of The Survey System. The number of columns you can actually print on a page depends on the column width and your font and page setup choices.

We will use **Question 7 - "Gender"** as the first heading in this banner.

Number of Banner Columns – This choice determines how many different groups of people to show under an individual banner heading.

We want to show two groups of people (Male and Female), but we do not need to enter "2," since The Survey System will get instructions for this heading from the Question File.

Extra Space Before Heading – If your tables do not include the gridlines that appear by default around each cell (see the **Miscellaneous Table Options** help topic), you can enter a number of inches (or millimeters) here to add extra space between banner headings. These extra spaces between headings can emphasize that each heading is a different way of classifying people. If there is room for these extra spaces on your tables, they can make the tables easier to read.

- Leave the default of “0.”

Number of Variables to Define this Heading – Your choices are 1 or 2. This number indicates whether this heading will use one or two ways to classify people (e.g., you can combine two separate gender and age questions into one gender/age banner heading).

- Since we are only classifying people based on a single variable (gender) in this heading, leave the default of “1.”

The **Upper Variable** section of the window is disabled, because we are only using one variable.

The Survey System finds the data for a heading from a **question** in a Question File. If you know the **name** of the question, you can type it into the **Question** field. Alternatively you can use the **List** button and select a question from the Questions window. This method has the advantage that The Survey System will get the number of banner columns and default labels from the question instructions.

- Click **List…** to open the **Questions** window.
- Select Q.7 “Gender” and click **OK** or double click on it.

Labels for the First Banner Heading

Since we used the List button to specify the variable, The Survey System shows default banner heading and column labels. Usually you will need to edit these labels to make attractive banners.

The labels use the current banner font selected in the Fonts and Page Setup window. Unless you change either that font or the banner column width after you enter the labels, the labels will appear as you enter them here. You can use the enter key to include line breaks. The columns will expand vertically as needed to fit the text you enter.

- Edit the labels to look like those illustrated below:

You need not center the labels. The software will automatically center them when it produces the tables.

Data Values for Banner Columns

The **Data Values for Each Banner Column** fields specify the answer choice numbers that will go into the columns directly above. The Survey System shows a “1” under the first banner column and a “2” under the second as defaults. You can edit these numbers to change the order of the answers or to put more than one answer choice in a column, if desired. We will accept the defaults for this heading.

- Click **Next**.

The Second Banner Heading

To demonstrate other options, we will make the second banner heading a two-variable heading. We will use both **Question 7** (gender) and **Question 8** (age) to show banner columns that classify people based on *both* their gender and age group.

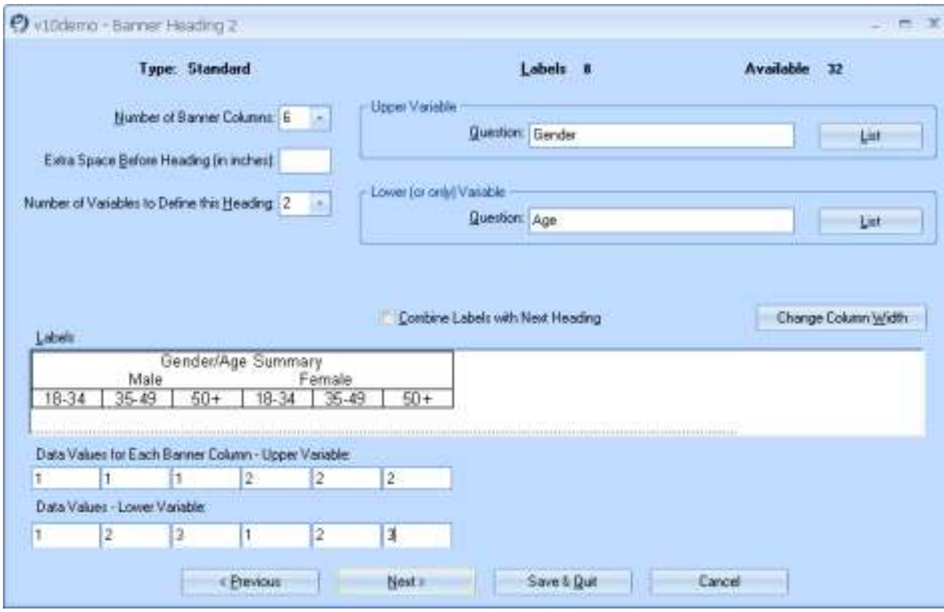
- Specify each of the following:

  Number of Banner Columns: “6”
  (We have **3** age groups and **2** genders which gives a total of **6** (3 * 2) combinations)

  Number of Variables to Define this Heading: “2”
  (gender and age are two variables).

Specifying Two Variable banners

Since we are using two variables, both the Upper and Lower Variables sections are enabled. **Question 7** (Gender) will be the upper variable. **Question 8** (Age) will be the lower variable.



- Enter "Gender" in the **Question** field for the Upper Variable.
- Enter "Age" in the **Question** field for the lower variable.

Type in the Labels as shown in the illustration above.

ⓘ Note that we have centered "Male" and "Female" above their respective groupings by inserting extra spaces between them. This forces the program to center them above their column groups on the tables.

Below the labels box are fields to enter data values for both the upper and lower variables. The upper variable divides the heading into three adjacent banner columns for men (value 1) and three for women (value 2).

Each set of three has a column for each age group. For example, the first column has a value of 1 for the upper variable and a value of 1 for the lower variable. This combination specifies males aged 18-34. The second column has values 1 and 2, specifying males aged 35-49 and so on for the other combinations.

Gender

Male			Female		
1	1	1	2	2	2

Age Group

18-34	35-49	50+	18-34	35-49	50+
1	2	3	1	2	3

- ➢ Enter the values shown in the illustration for both the upper and lower variables.
- ➢ Since we do not need to add a third banner heading, click **Save & Quit** to return to the Banner sub-menu.

You have now finished setting up a Banner File and are ready to produce tables using this Banner File.

Producing Tables using a Banner

Producing a table with a banner follows the same steps as producing one without a banner. The only difference is that you must specify the file name(s) for the banner(s) you will use.

- ➢ Select **Report/Tables** from the main menu.

The Banner File 1, Question File and Data File fields should all show "Yourfilename" as the default. If not, enter the file names in those fields.

- ➢ To produce **Question 2**; enter "2" in the **Tables to Produce** field.
- ➢ Ignore the other fields in this window and click **Screen**.

My Own Survey

Question 2: Have you purchased an ACME product in the last year?

		Gender		Gender/Age Summary Male			Female		
	Total	Male	Fe-male	18-34	35-49	50+	18-34	35-49	50+
Base	10	6	4	1	3	2	3	1	0
Yes	7 70%	4 67% 57%	3 75% 43%	1 100% 14%	2 67% 29%	1 50% 14%	3 100% 43%	0 0% 0%	0 0% 0%
No	3 30%	2 33% 67%	1 25% 33%	0 0% 0%	1 33% 33%	1 50% 33%	0 0% 0%	1 100% 33%	0 0% 0%

Analyzed by You

- After viewing the table, click **OK** or **Cancel** in the Tables window and **Close** in the Produce Tables window to return to the main menu.

Customizing Table Content & Appearance

The Survey System offers two distinct ways to customize the content and appearance of your tables. One is to edit the **Options Window**, and the other is to create a **Format File**.

The **Options Window** offers choices that you will probably change only rarely, such as drawing lines across the tops or bottoms of your tables, showing gridlines, the positions of certain labels on the page, whether to automatically show the numbers of people who did not answer your questions and so on. The **User Options and Settings** help topics describe how to change these options. You can also use the **Utilities** menu to modify the **Fonts & Page Setup** choices (see the corresponding help topics).

Format Files contain choices that are more likely to change from table to table in a study. These include what numbers to see, what statistics to see, decimal places, ranking and so on.

You can apply a Format File to as many tables as you like or assign different Format Files to different tables you will produce at one time. You can re-use Format Files in later studies.

Now we will create a Format File to use with the "Which products did you purchase?" question. We will make the following three changes to that table:

1. When we produced this table with the Banner File, we saw frequencies, column percents and row percents. We will use the Format File to show only frequencies and column percents.

2. Since the question allowed more than one answer per person, the number of answers and the number of people are different. Previously we saw the percentage of answers that each month received. We will now show the percentage of people picking each answer.

3. The rows on the table appeared in the order they were entered in the Question File. We will use the Format File to rank the rows in the order of each month's popularity.

Creating a Format File

To create the Format File:

- Select **Instructions/Format/New** from the main menu.

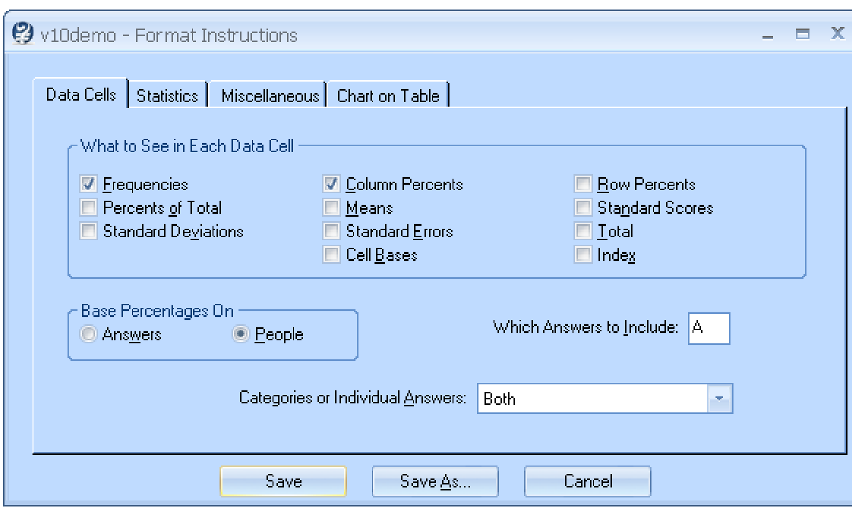
- Enter the file name "Yourfilename" in the **Save As** window and click **Save** to open the Format Instructions window. The first page in the Format Instructions window is labeled **Data Cells**.

The Data Cells Page

A **Data Cell** is the intersection of a column and a row on a table. It is where we saw the frequencies and percentages on the multiple choice table and means on the numeric table. Each data cell choice only applies to certain types of questions/tables. The **Data Cell Choices** help topic shows which data cell choices apply to which kinds of tables. If you specify a Format File with a data cell choice that does not apply to the kind of question you are producing, that choice is ignored when the table is produced.

What to See in Each Data Cell – Check the box next to the kind of data you wish to see.

➢ Check **Frequencies** and **Column Percents**. Selecting just these two options makes change number one.



Since we did not check the **Row Percents** box, row percentages will not appear as they do in the default format of The Survey System.

Base Percentages On – Percentages can be based on the number of people answering the question or on the total number of answers.

➢ Select **People**. Percentages will now be based on the number of people answering the question, rather than the total number of answers. This selection makes our second change.

We will not cover the other features on this page at this time. Please press the **F1** key when you are in a specific field for a detailed description.

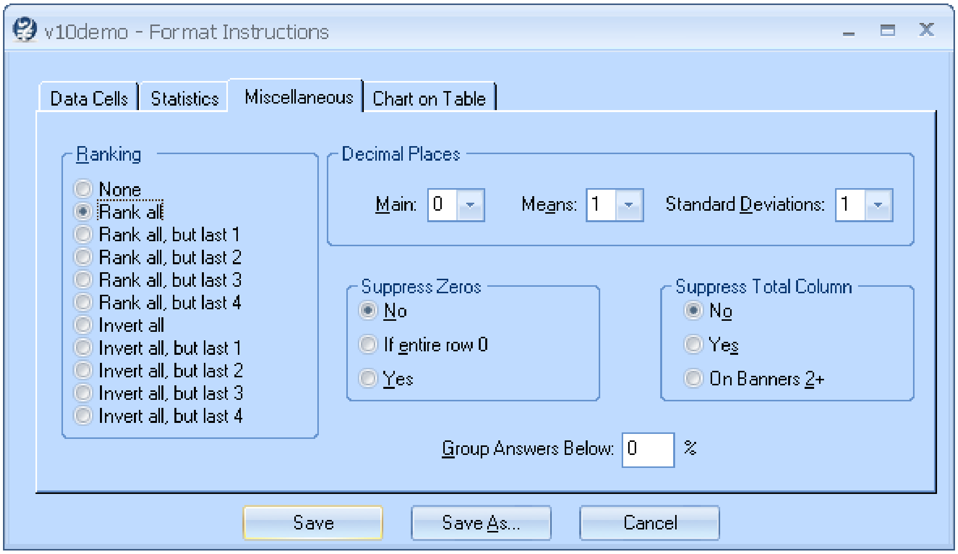
The Statistics Page

The **Statistics** page provides a variety of statistics you can add to tables, such as means and chi squares. We are not adding any statistics.

In addition to showing some statistics on tables, you can use the optional **Advanced Statistics Module** create separate correlation, regression and analysis of variance reports.

The Miscellaneous Page

➢ Click on the **Miscellaneous** tab.



Ranking – This section offers several alternatives for ranking the rows on a table.

If your last choice is "Other" or "None" you will usually want it left at the bottom of the table, even if it is picked more often than other choices. In that case you would use one of the Rank all, but last choices.

In this case we want all choices ranked.

- Select **Rank all**.

We will not use any of the other options on the **Miscellaneous** page.

The Chart on Table Page

The Survey System usually produces tables and charts separately. This page can show both tables and charts on the same page.

Click **Save** to return to the **Instructions/Format** sub-menu.

You have now created a custom Format File and are ready to produce tables using this file.

Producing Tables with a Custom Format File

As with most other optional files (e.g., Banner Files), there are two ways to produce tables with custom Format Files. The first method is to specify the name of the Format File to use in the Question File. While creating the Question File, you can enter the names of the Format Files in the **Report Options** window for each question. You can use existing Format Files or enter a name in the box and create the Format File later. The second way is to tell the program the name of the Format File when you actually produce the tables. We will use the latter method for this exercise.

Many users create a library of Format Files to re-use in later studies.

You produce tables with a Format File the same way you did using a Banner File. The only difference is that you enter the name in the **Format File** field in the Produce Tables window. To summarize the steps:

- Select **Report/Tables** from the main menu.

- In the Produce Tables window, the **Banner 1**, **Question**, **Data** and **Format File** fields should all show “Yourfilename” as the default File names. If not, edit them to do so.

- Enter “3” in the **Tables to Produce** field and click **Screen**.

If you have followed all of the steps correctly, the table will look like the following page:

This table shows the three changes we made using the Format File:

1. It shows only frequencies and column percents.

2. The percentages are based on the number of people, rather than the number of responses.

3. The rows are ranked in order from the most picked to least picked.

My Own Survey

Table 3: In which months did you take any vacation days last year?

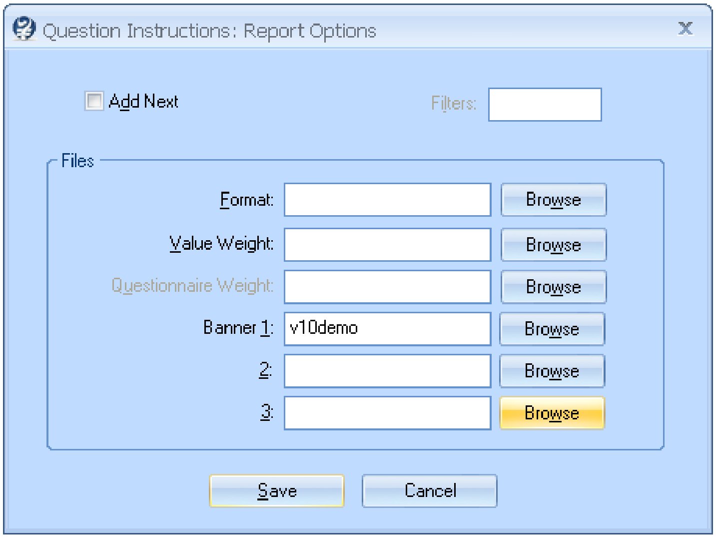
		Gender		Gender/Age Summary Male			Female		
	Total	Male	Fe-male	18-34	35-49	50	18-34	35-49	50
Base	10	6	4	1	2	3	3	1	0
November	6 60%	3 50%	3 75%	1 100%	2 100%	0 0%	2 67%	1 100%	0 0%
July	5 50%	2 33%	3 75%	0 0%	1 50%	1 33%	3 100%	0 0%	0 0%
January	4 40%	3 50%	1 25%	1 100%	1 50%	1 33%	1 33%	0 0%	0 0%
March	3 30%	1 17%	2 50%	0 0%	0 0%	1 33%	2 67%	0 0%	0 0%
December	3 30%	2 33%	1 25%	1 100%	1 50%	0 0%	1 33%	0 0%	0 0%
May	2 20%	1 17%	1 25%	0 0%	0 0%	1 33%	1 33%	0 0%	0 0%
August	2 20%	1 17%	1 25%	0 0%	0 0%	1 33%	1 33%	0 0%	0 0%
September	2 20%	1 17%	1 25%	0 0%	1 50%	0 0%	1 33%	0 0%	0 0%
October	2 20%	1 17%	1 25%	0 0%	1 50%	0 0%	0 0%	1 100%	0 0%
February	1 10%	1 17%	0 0%	0 0%	0 0%	1 33%	0 0%	0 0%	0 0%
April	1 10%	1 17%	0 0%	0 0%	0 0%	1 33%	0 0%	0 0%	0 0%
June	1 10%	1 17%	0 0%	0 0%	0 0%	1 33%	0 0%	0 0%	0 0%

➢ Click **OK** or **Cancel** in the Tables window to return to the Produce Report window.

Editing the Question File from the Produce Tables Window

You can also produce the numeric table and the answer grid table at the same time in a “batch run.” To do this, you must edit Question 4 to include the Banner File “Yourfilename” as a **Report Option**. You can do so by double-clicking on Question 4 in the program’s main window or by going through the Instructions menu, but we will show you how to do this from the Produce Tables window. Editing questions from this window saves time when you want to make changes while producing tables.

- Click on the **Edit** button to the right of the **Question** field.
- Enter “4” in the Question to Edit window and click **Edit**.
- Click on the **Report Options** button near the bottom right of the Question Instructions window.



- Enter “Yourfilename” in the **Banner 1** field and click **Save**.
- Click **Save & Quit** in the Questions Instructions window.

- Click **Done** in the Question to Edit window to return to the Produce Tables window.

Producing Numeric and Answer Grid Tables

If we leave the Banner File name showing, The Survey System would use it for all the questions we produce. If we use it for the answer grid question, The Survey System would produce a separate multiple choice table for each sub-question, using the answer grid column labels as answer choice labels. Since we want to see the answer grid column labels as column labels, we must produce the table without a banner.

- Remove file names from the **Banner** and **Format File** fields, if there are any, and leave them blank.

- "Yourfilename" should appear in the Question and Data fields.

The Format File we created earlier is not suited to the answer grid question, since it lacks row percentages as a data cell choice. Generally you will want to see row percentages on answer grid tables.

- Enter "4, 5" in the **Tables to Produce** field.

- Click **Screen** to produce the Tables.

My Own Survey

Table 4: What percentage of your monthly income do you spend on each of the following?

	Total	Gender		Gender/age summary Male			Female		
		Male	Fem ale	18-34	35-49	50	18-34	35-49	50
Base	10	6	4	1	2	3	3	1	0
Accommodation	16	22	7	19	22	24	10	0	0
Food	18	20	14	28	17	21	11	25	0
Travel	20	18	22	23	17	18	21	25	0
Entertainment	19	16	23	15	18	13	23	20	0
Medical	18	14	24	5	16	16	25	20	0

Analyzed by You

- Click **Next** to view Table 5. It will look the same as it did earlier. It does not use either the **Banner File** or **Format File** specified for the previous question.

- After viewing this table, click **OK** or **Cancel** in the Tables window

An answer grid question uses its column labels to label columns when you produce it without using a standard banner. When you produce an answer grid using a standard banner, the grid column labels become row labels and the program shows each sub question in a separate table, as if it were a multiple choice question. Now we will produce the answer grid question with a standard banner.

- Browse to or enter “Yourfilename” as **Banner 1** in the Produce Tables window.

- Enter “5” in Tables to Produce and click **Screen** to see the example on the next page.

Note that “Is courteous and helpful” appears below the table label. This is the sub-question label. The table shows the demographic breakdown of the answers to this sub-question.

- Click **Next** to see the next sub-question or **Cancel** to return to the Produce Tables window.

- You can also choose to see just a single sub-question by entering the question number, a period and then the sub-question number (e.g., 5.1) in the Tables to Produce field.

- Press **Close** to return to the Produce menu.

My Own Survey

Question 5.1: How much do you agree or disagree with the following statements about your ACME representative?

Is courteous and helpful

		Gender		Gender/Age Summary Male			Female		
	Total	Male	Fe- male	18-34	35-49	50	18-34	35-49	50+
Base	10	6	4	1	2	3	3	1	0
Strongly Agree	3 30%	2 33% 67%	1 25% 33%	1 100% 33%	0 0% 0%	1 33% 33%	0 0% 0%	1 100% 33%	0 0% 0%
Agree	4 40%	3 50% 75%	1 25% 25%	0 0% 0%	2 100% 50%	1 33% 25%	1 33% 25%	0 0% 0%	0 0% 0%
Neither Agree nor Disagree	2 20%	0 0% 0%	2 50% 100%	0 0% 0%	0 0% 0%	0 0% 0%	2 67% 100%	0 0% 0%	0 0% 0%
Disagree	1 10%	1 17% 100%	0 0% 0%	0 0% 0%	0 0% 0%	1 33% 100%	0 0% 0%	0 0% 0%	0 0% 0%
Strongly Disagree	0 0%	0 0% 0%	0 0% 0%	0 0% 0%	0 0% 0%	0 0% 0%	0 0% 0%	0 0% 0%	0 0% 0%

Analyzed by You

Producing Charts

The Survey System can produce many 2-D and 3-D charts from the same instructions used to produce tables.

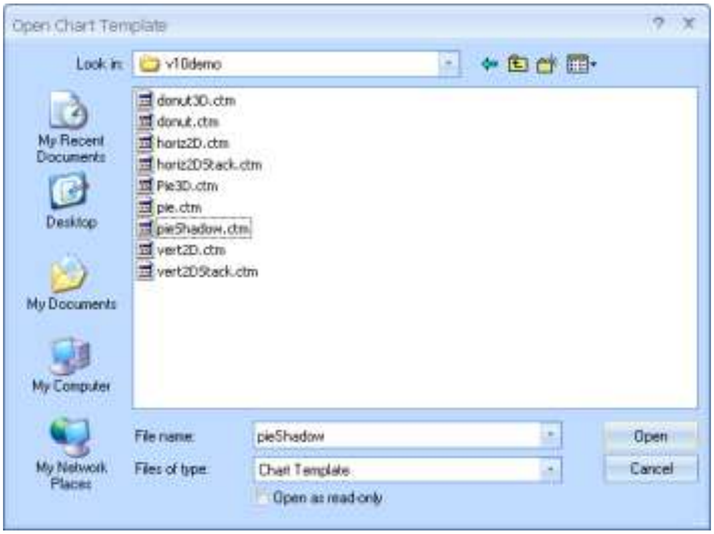
- Select **Report/Charts** from the main menu.

The Produce Charts window will open.

- Enter "Yourfilename" in both the **Question** and **Data** fields and delete any file names in the other fields.

- Enter "3" in the **Charts to Produce** field to see Question 3 as a Chart and click **Screen**.

The Open Chart Template window will appear.



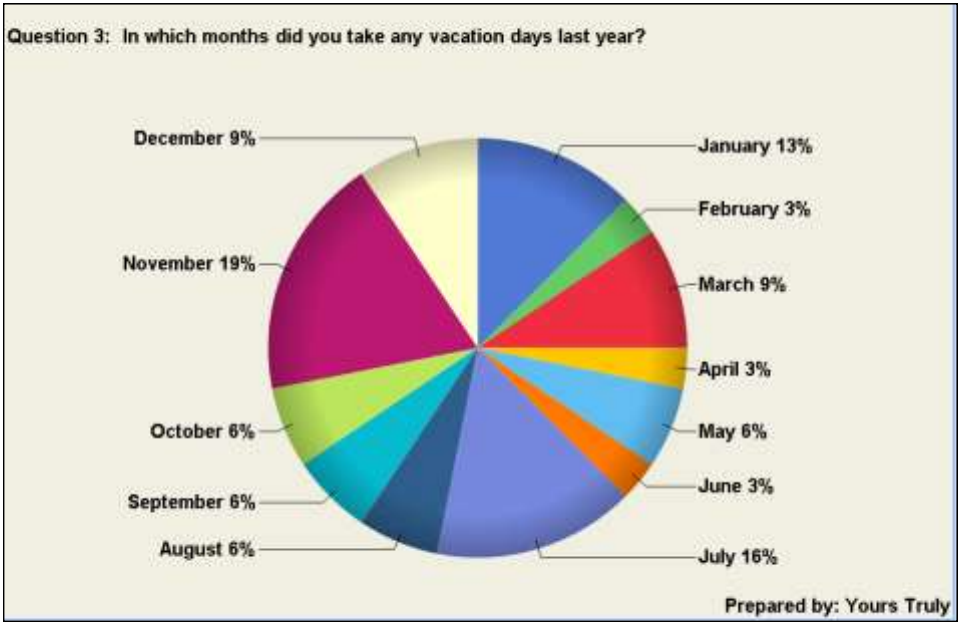
The Open Chart Template Window

The Open Chart Template window shows the names of template files that contain the chart format features. All the charts you produce using a template will use the format saved in that template. The data and labels shown will be different for each question you use to create a chart. The type of chart, fonts, label positions, 3-D characteristics (if any) and so on will be those specified in the template.

We provide several templates to get you started. You can use them as they are, edit them or create your own templates. You must select an existing template to produce a chart. You can then modify it on screen, if you wish, and save the changes. The names of the Template Files we provide relate to the type of chart they will produce (e.g., “horiz2d” will produce a horizontal two-dimensional bar chart).

- Select “Pieshadow” and click **Open**.

The buttons at the bottom of the Charts window let you print the chart, save it to the clipboard, save it to a .BMP, .WMF or .JPG file, open a different Template File, save any changes to a new template file or edit the chart (see the **Chart Window** help topic for details).



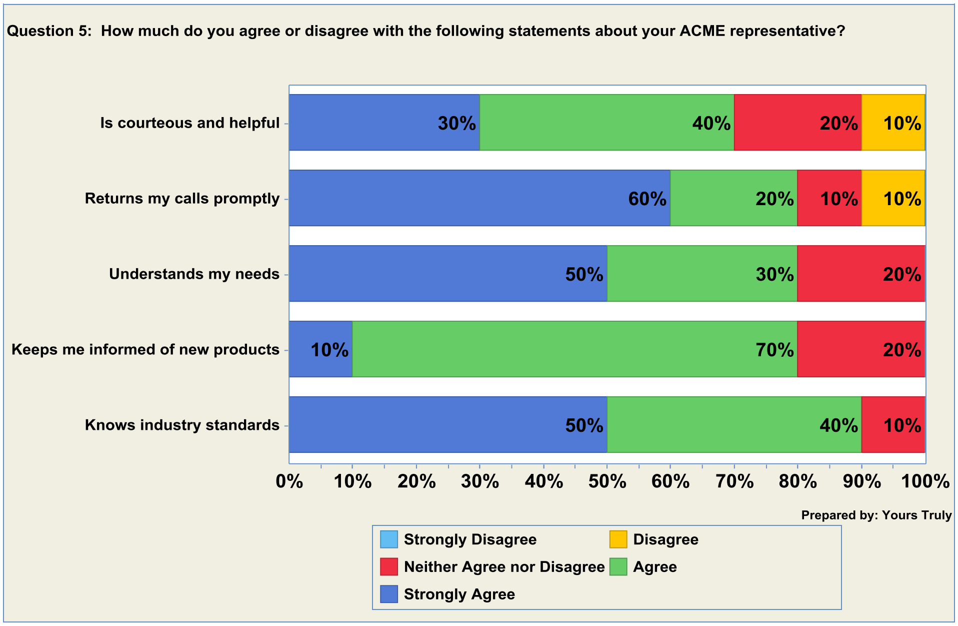
- Click OK or Cancel to return to the Produce Charts window.

The **Options** button in the produce Charts window lets you modify several aspects of charts that are not governed by chart templates. For example, the position of the question label or legend box and whether the chart should be produced in portrait or landscape orientation.

Different kinds of questions often look better in different kinds of charts. For example answer grid questions usually looked best as stacked bar charts.

- **Enter "5" as the** Chart to Produce.
- Select **Screen** and choose "horiz2Dstack" as the template.

After viewing this chart, you can experiment with other choices or return to the main menu.



Saving a Project

The Survey System can save all the current files as a **project**. This is the easiest way to switch between different studies, since it avoids having to open a study's Question, Data, Banner and other files separately.

Select **File/Save as Project** from the main menu.

- Enter the file name "Yourfilename" in the Save As window.

Now you can reopen all the Yourfilename files at any time by using the Project File icon , or File/Open Project. You can also open a recent project by selecting its number from the bottom of the File menu.

You have now completed the Producing Reports tutorial! The next tutorial will describe how to convert a Word, RTF or TXT document into a Survey System Question File.

Chapter 5: Importing a Question File

The Survey System's import Question File feature is a great time saver, if you already have your survey in a document format. This will often be the case if someone else sends you a questionnaire they want you to use.

The Survey System can import a survey from a text or RTF File. It can also import from a Word DOC or DOCX File, provided you have Word installed on your PC. Since some people do not have Word on their PC, we have supplied an RTF file for this exercise.

The Survey System offers four Question File importing modes. The first two are called **free format** and can import the exact same files. The difference is that the menu choice **Free Format: Automatic** imports the complete file in one step. You can then edit any questions that need editing. In contrast, the menu choice **Free Format: Approval** imports one question at a time into the Question Instructions window. You can edit the question as you wish and then use the Next button to import the next question.

The Import Questionnaire sub-menu offers two other formats: Basic and Detail. You can use these formats to import files from some other programs, like Remark Office OMR, that create files to be imported into The Survey System. We will not discuss these formats in this tutorial.

Source File Format Rules

The free format importing mode is very flexible, but some simple rules are needed to enable The Survey System to understand the source document. The three most important rules are that each question must start with "Q." (with the period), each answer choice must be on its own line and there must be a blank line between the question text and the first answer choice. The blank line must be a real line on which you could type, not just extra space that appears after a paragraph, because of paragraph formatting instructions.

If you want to import your own questionnaire, please see the **Free Format** help topic. A second topic, **Free Format Optional Codes,** describes codes you can add to the source file to give The Survey System extra instructions, such as that a particular question requires an answer or that it allows X responses per person.

The Questionnaire Source File

We will import the following questionnaire:

Acme Industries Second Consumer Survey

Q.1 Have you purchased an ACME product in the last year?

Yes............. 1
No............... 2

Q.2 Which products did you buy?

....	Widgets	1
....	Whatchamacallits	2
....	Thingamabobs	3
....	Doohickeys	4
....	Grumets	5
....	Other (please specify) ______________________	6

Q.3 How much did you pay for each of the following items?

CD player ..... ____
DVD .... ____
HD TV .... ____

Q.4 Please indicate whether you agree or disagree with each of the following statements about your ACME representative?

	Level of Agreement				
	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
Is courteous and helpful	5	4	3	2	1
Returns my calls promptly	5	4	3	2	1
Understands my needs	5	4	3	2	1
Keeps me informed of new product lines	5	4	3	2	1
Knows industry standards	5	4	3	2	1

Q.5 What is your gender?

Male 1
Female 2

Q.6 What is your age?

18-34 1
35-49 2
50+ 3

Importing the Question File

- Select **Instructions/Question/Import/Questionnaire/Free Format: Automatic** from the Main Menu.

The **Open File** window will appear.

- Select “v10demo2.RTF.” You may need to select Rich Text in the **Files of type** field in order to see this file.

The **Save As** window will appear.

- Enter a unique file name in the **File name** field, and press Enter. The reason the name must be unique is that we will use the imported Question File in the next chapter to create a Web page survey, and your file must have a different name from other peoples' files.

The Survey System will import the file and show the questions in the question list in the main window.

Note that you will see seven questions there, rather than the six that appear in the source file. The reason for this is that an answer choice for Q.2

....Other (please specify) ____________________

includes a space to write in an answer. That space becomes a verbatim question. The verbatim will appear next to the choice in a Web page survey or as a pop-up box when using Data/Interview or an Interview Station.

Answer Grid Columns Width

The Survey System knows to import the grid in our sample questionnaire file as an answer grid question, but it does not know how wide you want each grid column to appear on a web page. If you do not specify a width, the columns will appear in different widths, depending on their labels.

- Double-click on Question 5 "Please indicate…"
- Click on the **Edit** button near Answer Grid Columns File.
- Specify "70" as the **Column Width on Web**. Then **Save**.
- Then **Save & Quit** the Question Instructions window.

Interview Logic Instructions

You can use logic instructions for a wide variety of purposes, such as skipping questions (branching), inserting the answer of one question into the text of another (piping), randomizing the order in which a series of questions are asked, showing a picture and much more.

One logic instruction tells The Survey System that a verbatim question should appear as part of a choice for the previous question, instead of as a separate question. The Survey System added the needed instruction automatically when it imported the "Other (please specify)" question. At other times you might need to add this instruction manually.

We will add a logic instruction to make the answers to the products purchased question appear in a random order.

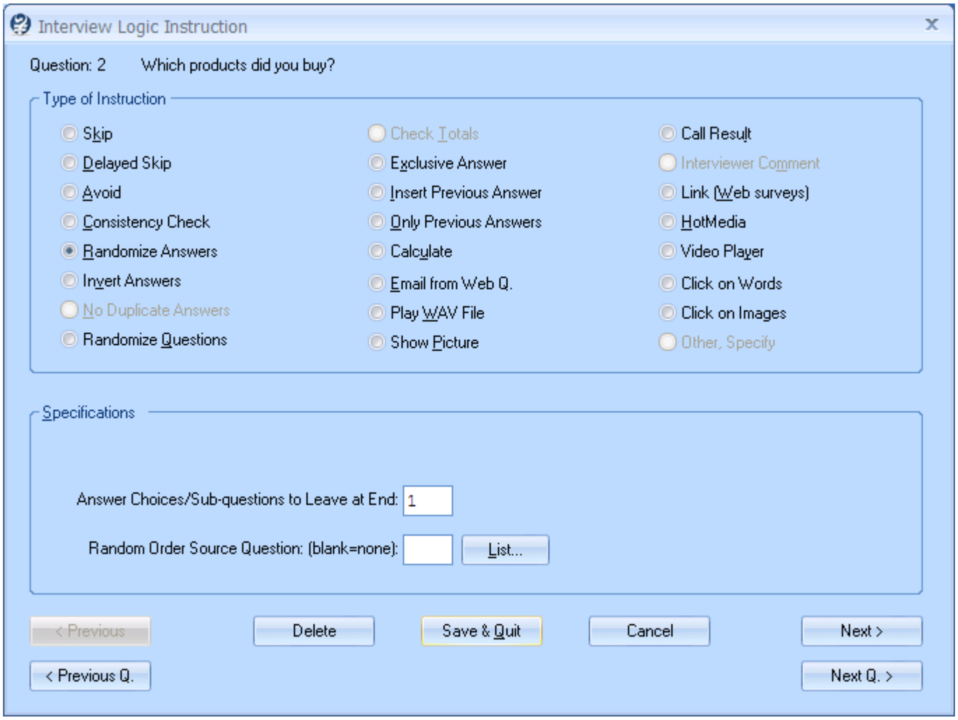
- Right-click on the second question in the main window and select **Logic**.

The **Interview Logic Instructions** window will appear. A few **Type of Instruction** choices are disabled, because they do not apply to a multiple choice question. You can learn about the range of choices by pressing the **F1** key.

- Select **Randomize Answers**.

- Then enter "1" in the **Answer Choices/Sub-questions to Leave at End** field.

Entering in a "1" in that field tells The Survey System to always leave the last 1 choice at the bottom of the list. Note that this is the number of choices to leave at the bottom, not the code number of a choice. For example, if the last two choices for a question were "None" and "Don't know," you would enter a "2" in this field to tell the program to always leave the last 2 choices at the bottom of the list.



The **Next** button lets you enter another logic instruction for the current question. The **Next Q.** button lets you move to the next question and add logic instructions to it. Since we are not adding any other logic instructions to this survey, we will not use either at this time.

- Select **Save & Quit**.

You have now imported a questionnaire and added a logic instruction. The next section of the Tutorial will use that questionnaire to create a Web page survey.

Chapter 6: Web Surveys

You must have a copy of The Survey System Evaluation Edition or the optional **Internet Module** to complete the rest of this tutorial.

The Survey System's Internet Module makes it easy to create and administer a Web-based survey. Any questionnaire created by The Survey System can be easily converted into a Web survey. The Survey System offers you a wide variety of choices in the way your Web questionnaire looks and works.

In the Web Surveys tutorial you will:

- Create the Web survey.
- Upload the survey to a server.
- Enter data using the Web survey.

This chapter assumes you have completed all the earlier tutorial exercises.

Web Site to use for this Tutorial

There are four ways you can complete this tutorial, depending on which Web site you want to use:

1. **www.surveydemo.com**. This is a Web site that Creative Research Systems maintains for people to experiment with The Survey System.

2. Your own PC as a Web site. To use this method, your PC must have Web server software, such as IIS, installed.

3. Your own Web site (The Survey System Web Module currently works with Windows servers only).

4. The Survey System's built-in browser. This lets you preview the pages you have created without using a Web site. This option

shows how your Web pages look, but not how they operate, i.e., they will not save data or obey logic instructions.

This tutorial primarily follows the first method, **www.surveydemo.com**, since we can give you exact instructions for using our site. The next two methods require specific details about your PC or Web server, which we cannot provide. Using surveydemo.com is also faster, since you can skip server setup. We include notes about using your own PC or server as appropriate.

Special Terminology

To use any of the first three methods you need to know three special terms: **SSWEB**, **SSWEB URL** and **Data Path**.

SSWEB - SSWEB is the survey server component of The Survey System that goes on a Web site to receive the survey answers and show the next page. It is a file called SSWEB10.CGI and is found on The Survey System CD and the Evaluation Edition download page.

SSWEB URL – This is an address on the Web. It tells respondents' browsers where to find SSWEB. Most people put it in a folder called "cgi-bin."

A complete SSWEB URL looks like:

http://www.surveydemo.com/cgi-bin/

Data Path – The Data Path tells SSWEB where to find the data and instructions. They can be in any folder on your server. This is a Windows path, *not a URL*. It starts with a drive letter, a colon, and a backslash (e.g., "C:\"). This is the path a person would use if they were sitting at the server and using Word or another program to find a file in the data folder.

If you use your own Web site, you must set up your Web server so that SSWEB can run (execute) and write to the Data File. Please see the **Uploading the Survey and Report Servers** help topic for details.

If you are unsure about the URL or data path details on your server, please consult your webmaster or Web service provider. If either of these is specified incorrectly, the survey will not work.

The respondent cannot see the name of the data folder or a URL to get to it. They can only see the URLs of the first page and SSWEB. If you are working on a real survey and are concerned about someone hacking into your site, you can put the first page of the questionnaire in a completely different location anywhere on the Web. You can give that page a name that is not related to the names of the rest of your files. If you do this, people taking your survey will not know the URL of the data folder or the names of the files in it.

Using Surveydemo.com

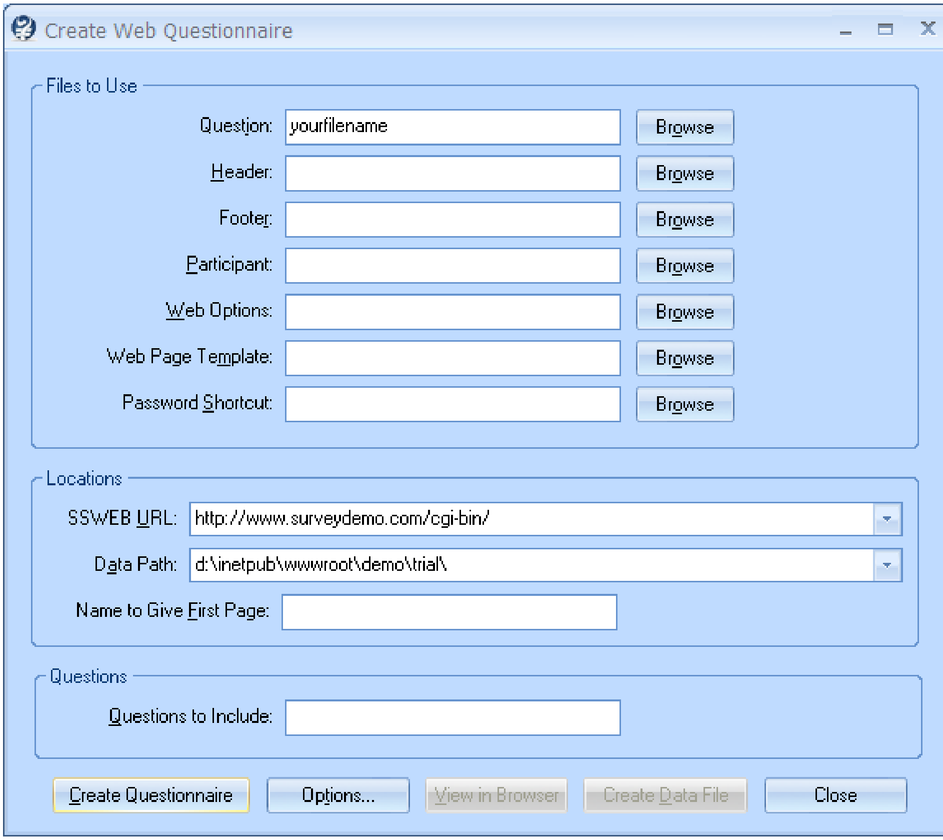
Creative Research Systems maintains **surveydemo.com** as an easy way for people to experiment with The Survey System. Please note that there are limits on Data File size and use of graphics at surveydemo.com. See the **surveydemo.com** help topic or Web site for details.

Surveydemo.com is a site many people share. They may be able to see your questions *and* your data. Do *not* put anything confidential on this site!

Web Questionnaires

The Create Web Questionnaire Window

- Select **Web/Create Web Questionnaire** from the main menu.



- ➢ Enter the name you gave to the **Question File** you imported in the previous chapter, if it does not appear as the default.

Header and Footer Files – You can use these files to put extra text that is not part of your questionnaire at the top or bottom of the questionnaire's Web pages. One use for a header is to put an introduction or instructions on how to complete the questionnaire on the first page. One use of a footer is to put a company name or contact information at the bottom of each page. Header and Footer Files are text files you can create by selecting **Utilities/New Text File** from the main menu or by using any other text editor.

Participant File – You can use a Participant File to limit access to your questionnaire and/or to combine the answers to your questionnaire with existing data you have about your respondents.

Web Options File – Options Files save choices you make to modify the appearance and function of Web surveys. If you are not using an existing Web Options File, you can create one using The Options button at the bottom of the window. Saving options choices in files lets you easily switch option choices between different projects.

Web Template File – Some webmasters create template files for their sites. These are skeleton Web pages that have certain elements common to all the pages at their site. If you specify a Web Template File in the Create Web Questionnaire window, The Survey System will insert the questionnaire into copies of that file. To use this feature, see the **Web Page Templates** help topic.

- We will not use any Header, Footer, Participant or Template Files in our sample Web Survey, so leave those fields blank.

Locations

Please note that some servers may be case sensitive.

- Enter the SSWEB URL and Data Path *exactly* as they appear on the next page.

The **SSWEB URL** for surveydemo.com is:

http://www.surveydemo.com/cgi-bin/

The **Data Path** on the surveydemo server is:

d:\inetpub\wwwroot\demo\trial\

Please note that URLs use slashes **(/)** and data paths use backslashes **(\ )**.

This data path is valid at the time of printing. Since it is server-specific, it may change in the future. You can check the current path at **www.surveydemo.com** by clicking on the **Locations** link.

> **Name to Give First Page –** Use this field to specify the name you want to use for the first page of your questionnaire. It must follow standard URL restrictions (e.g., no spaces). You can put the first page anywhere on the Web. It need not be in the same folder, or even on the same Web site as the rest of the questionnaire. If you leave this field blank, The Survey System will use the name of the Question File to assign a name to the first page.

- ➢ Enter YourFileName as the name, if it is not the default.

Questions to Include

The Questions to Include field lets you restrict which question pages you want The Survey System to create. Always leave this field blank to create all the pages the first time you create a Web questionnaire. Later, if you have edited some question instructions and only want to create new copies of those pages, you can use this field to limit which new pages to create.

Creating the Web Questionnaire

We will first create the Web questionnaire with the default appearance options. After we preview it, we will modify its appearance and produce it again.

- ➢ Click **Create Questionnaire** to produce the Web questionnaire.

The Survey System will compile the Web survey and create a number of files. The **Web pages** will have ".htm" extensions. The first page will have the name you specified in the Locations section of the Create Web Questionnaire window. The other file names will consist of the name of the Question File and the number of the first question on the page. For example, "v10demo03.htm" would be the name of a page that starts with Question 3 in a Web questionnaire made from a Question File called "v10demo." A page may contain one or more survey questions.

ⓘ Unlike most other Web survey software, The Survey System lets you edit these pages to meet special needs not covered by its wide range of options. If you wish to edit these pages, please first read the **Editing Web Survey Pages** help topic.

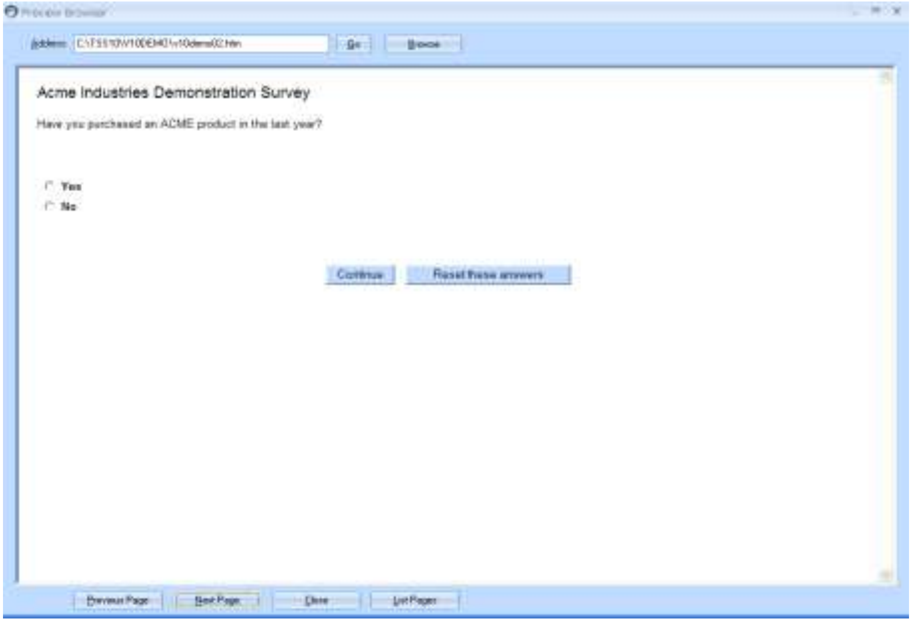
After The Survey System creates the Web questionnaire, it will show you a **Done** message.

➢ Click **OK**.

The Survey System will take you back to the Create Web Questionnaire window.

➢ Click on the **View in Browser** button, which is now enabled, to open the Preview Browser window.

The Preview Browser window will show your pages in a functioning copy of Internet Explorer. This makes it very easy to see the visual effects of different choices you make in the Web Options window.



The questions will appear on two pages. If you do not give The Survey System instructions on how to divide the questions into pages, the program will only put in page breaks needed for logic instructions. In this case a break is needed before the second question, because the program cannot randomize answers on the first page of a survey, unless you use passwords. We show how to specify page breaks later.

Use the **Next Page** and **Previous Page** buttons to move forward or backward in the questionnaire.

ⓘ **Do not click on the Continue button inside the Web questionnaire itself. Clicking on Continue will give you an error message, because you have not yet sent the questionnaire to the server**.

- Click on **Next Page** to go through the pages you just created.

In addition to the pages with questions you will see several end pages. These are the last pages people will see in different situations. They have numbers such as 899x. People who complete the survey will see the page numbered 8999. The others are for people that are not allowed to finish, because they are not qualified, have exceeded a quota or have used a Save button (answers are always saved, but some researchers like to present such a button). There is also an error page which will appear with appropriate text in certain circumstances.

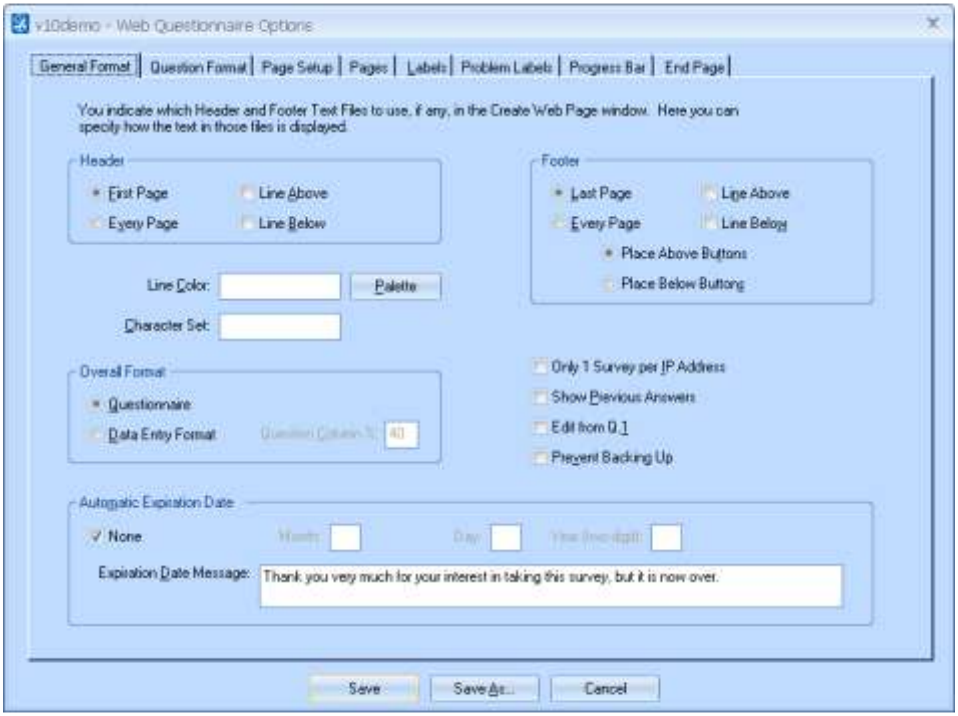
- After viewing your questionnaire, click the **Close** button to return to the Create Web Questionnaire window.

Web Questionnaire Options

The Survey System offers many options to customize the way your survey looks and works. Some apply to individual questions, for example whether a multiple choice question uses a drop-down list, whether answer choices are presented in one or more columns and whether a numeric question is a rank-by-dragging question. Use the **Web Options** button in the Question Instructions window to select these options.

Other options apply to an entire survey, for example whether to show a logo, a progress bar and/or use graphical selection buttons. You choose these options by using the **Options** button in the Create Web Questionnaire window.

- Click on the **Options** button to open the Web Questionnaire Options window.



The Web Questionnaire Options window has eight pages that control the look and function of your Web questionnaire. We will only describe some choices here as we show you how to change the way a Web survey looks and acts. The help topic for each page has a full description of all that page's choices.

ⓘ Do not click the **Save** or **Save As** buttons until you have viewed and made any changes on *all* of the pages in the Web Questionnaire Options window.

The General Format Page

The first page of this window is **General Format**. Its features include:

Header – This section determines whether a header file specified in the Create Web Questionnaire window appears on the **First Page** only or on **Every Page** of your Web survey. It can also let you add lines to visually separate this text from the rest of the page.

The **Line Above** choice draws a line across the page under the study name and above the header text. This line will appear regardless of whether or not you specify a Header File. The lines specified by the Line Below options inside the Header and Footer sections will only appear if you specify a Header File or Footer File.

- ➢ Check **Line Above** in the Header section.

Line Color – This field with the adjoining palette button lets you specify a color that will be used for all the lines you select on this page.

- ➢ Click on the **Palette** button to see the Palette window.

The Palette window shows the 216 “Web safe” colors. Click on a color to select it. This palette is available everywhere the Web Questionnaire Options window lets you select a color. You can also specify a color by entering a valid six-character HTML color number directly in the color field, instead of using the palette.

- ➢ Choose a line color.

ⓘ The **Line Color** choice affects the appearance of lines in Internet Explorer, Chrome, FireFox and other recent browsers. Some older browsers only show lines in gray.

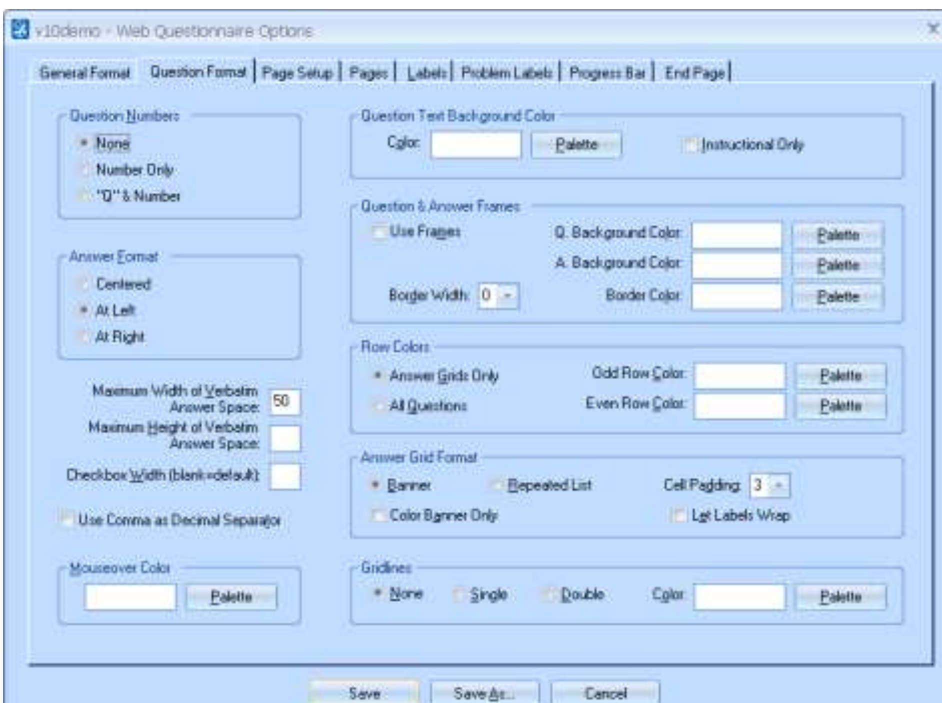
Overall Format – Questionnaire format shows answer choices below questions. This is almost always the better choice when producing a normal survey. **Data Entry** format shows questions in a column on the left of the page and answer choices in a column to their right. This format works best for registration forms and similar Web pages.

If you want part of a survey to use questionnaire format and part data entry format, you can specify the latter for individual questions using the Web Options button in the Question Instructions window.

- ➢ Click on Questionnaire Format, if it is not selected.

The Question Format Page

- ➢ Click on the **Question Format** tab.



The **Question Format** page offers a variety of options that affect the way your questions and answer choices will look.

Question Numbers – Shows question numbers if selected.

Researchers often prefer their live Web questionnaires not show question numbers, but these often help when testing a survey before going live. It is easy to create the Web questionnaire using question numbers and then, when testing is finished, to create the questionnaire again without question numbers.

Answer Format – Shows where the answer choices or sub-questions appear below your questions.

- Select **Centered,** so that the answer choices will be centered directly below each question.

Question & Answer Frames – The Survey System can put frames or boxes around the questions and answer choices or sub-questions. The frames have two sections: the question appears in the top section, the answer choices in the bottom.

- Check **Use Frames**.

- Select **Q.** and **A. Background Colors.** As with any sort of background, lighter colors usually work best. One combination that looks nice is gray (CCCCCC) and pale yellow (FFFFCC).

- Select "1" as the **Border Width**.

Row Colors – These choices specify alternate colors for the rows in the grid, to make the grids easier to read, especially if you are not using gridlines.

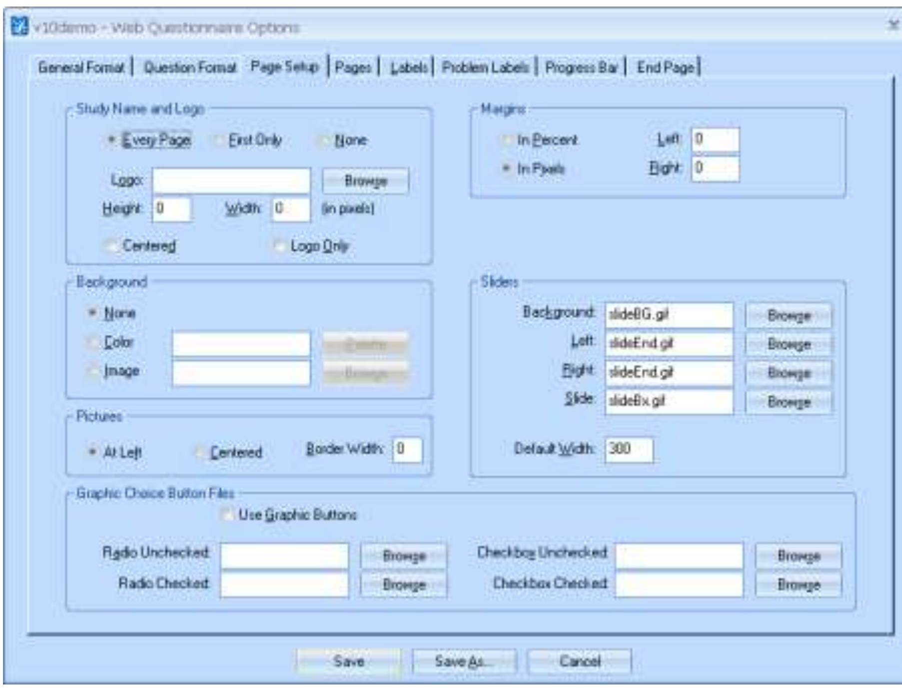
Gridlines – This section lets you show lines in answer grid questions on the Web page. It also determines whether gridlines appear around your whole questionnaire when you have your questionnaire displayed as a data entry form.

Mouseover Color – If you enter a color in this field, it will appear when a respondent moves their mouse over a multiple choice question radio button, checkbox or answer choice label, highlighting both the button or checkbox and the label. The respondent can click on any part of the highlighting to select the choice. The same effect applies to answer grid question cells. Since this option gives respondents a much larger area to click on to select a choice, it makes your survey easier to fill out.

- Use the **Palette** button to select a Mouseover Color.

The Page Setup Page

- Click on the **Page Setup** tab.



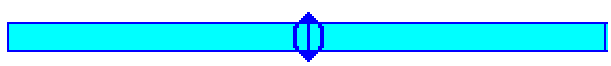
Study Name and Logo – Determines whether the study name will appear at the top of your pages. If you enter the name of a graphics file (.GIF or .JPG), it will appear to the left of the study name. You can specify the logo's size in pixels or leave the size at "0" to let it display at the size it was created.

Background – Determines the background look of your Web pages. If you do not specify any background, your questionnaire will appear with background colors that are determined by the browsers of your respondents. We recommend you always specify a background.

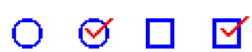
➢ Click on **Color** and then use the **Palette** button to select white or a color of your choice.

ⓘ Do not pick a background color that is too dark. Light background colors make words easier to read.

Sliders – Determines the look of any sliders used to enter answers to numeric questions. You must tell The Survey System to use sliders for specific questions in the Question Instructions: Web Options window.



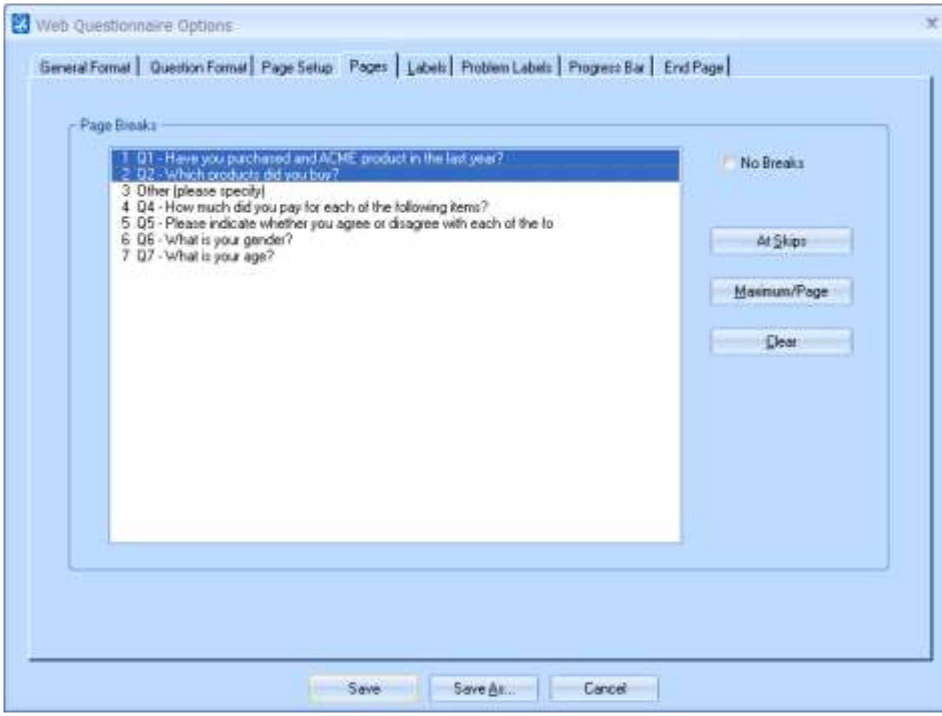
Graphic Choice Button Files – These choices let you show graphic buttons, instead of the standard HTML radio buttons and check boxes. For example:



ⓘ If you choose sliders or graphic buttons, you must copy the relevant graphics files to your Web site. The default examples shown above have already been copied to surveydemo.com. See the Help file topic on Sliders or Web Page Survey Setup (for Button files) for further details, including sample file names.

The Pages Page

➢ Click on the **Pages** tab.



This page defines which questions start a new Web page. You can show all questions on one page (that the respondent can scroll down), each question on a different page, or anywhere in between.

Some interview logic instructions require that particular questions start a new page. The program will create these breaks automatically. When you first go to the **Pages** page for a particular Question File, The Survey System will show you these breaks. The highlighted questions are the ones that start new Web pages.

You can use the buttons on this page to **Clear** all currently selected page breaks, show those breaks needed for **Skips** and other logic, or set a **Maximum** number of questions per **Page**. Many researchers like to show only one question at a time, and we will do so now.

- ➢ Click on the **Maximum/Page** button.
- ➢ Specify “1” in the **Questions Per Page** window.

The Survey System will highlight all the questions, except for the third one: Other (please specify). The program knows that that question must appear on the same page as the one before it.

The Labels Page

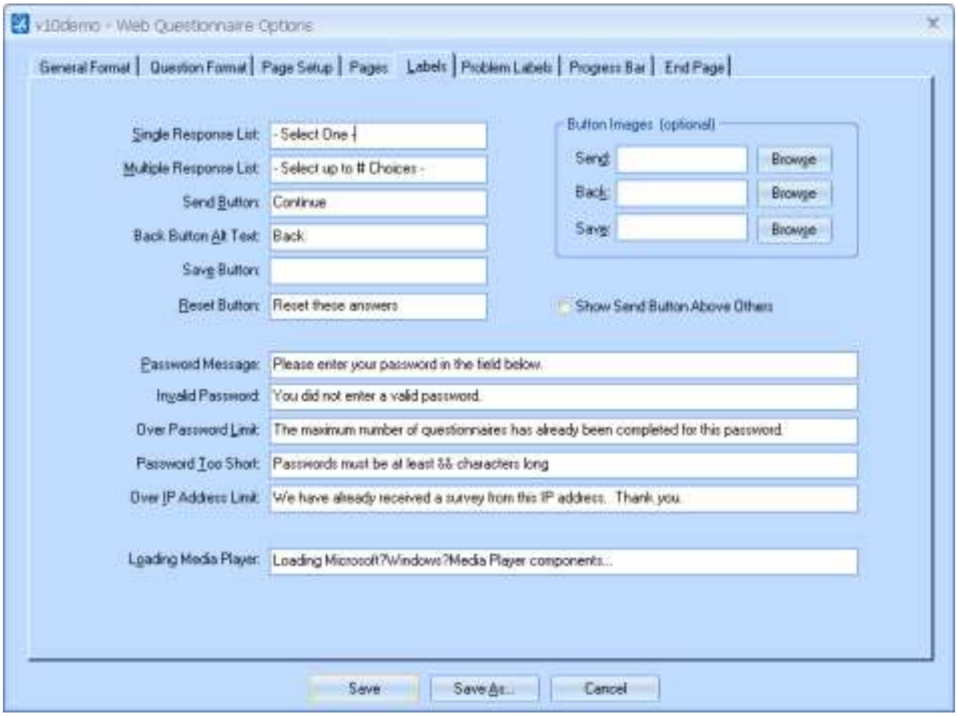
- Click on the **Labels** tab.

The **Labels** page of the Web Options window lets you edit many of the labels that The Survey System uses as part of the web questionnaire. You may use other languages instead of English.

ⓘ Please see the **Language Support** help topic, if you plan to use a non-Western language.

The Labels page also lets you replace the **Send** button (labeled "Continue" by default) that normally appears at the bottom of each page in the questionnaire with an image of your choice (from a .JPG or .GIF file). The Labels page can also specify an image as a **Back** button that can return respondents to the previous page. There is no text version of this button, since HTML does not offer one. The browser's **Back** button will also work.

If you delete the label for the **Reset** button, the button will not appear on your questionnaire. Some researchers feel a questionnaire looks better without this button.



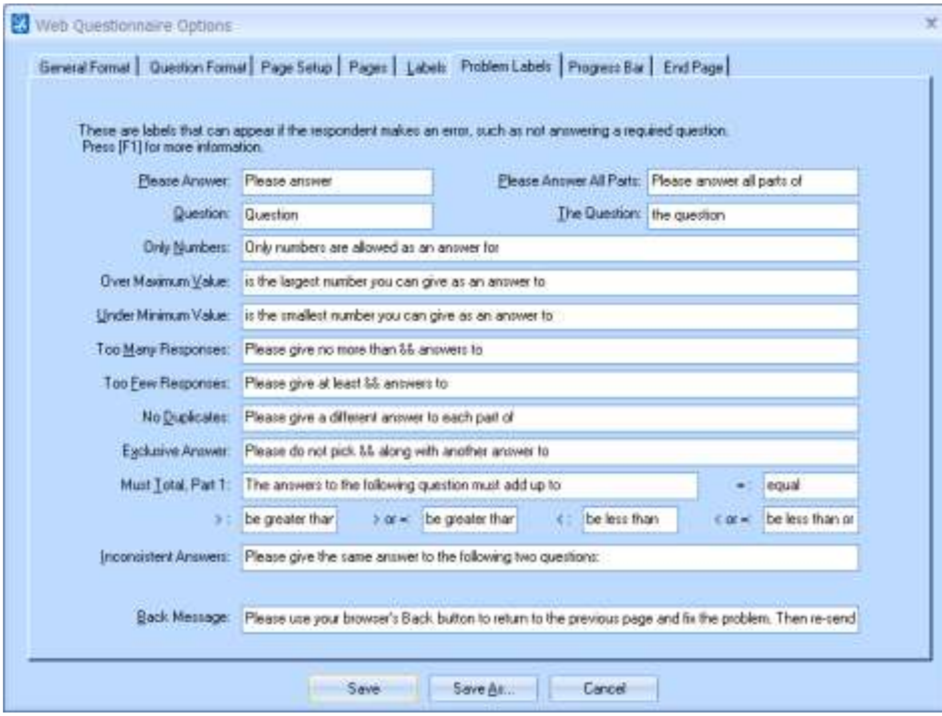
➢ Do not change any of these labels at this time.

The Problem Labels Page

➢ Click on the **Problem Labels** tab.

The **Problem Labels** page lets you edit the messages used to inform a respondent of a problem with an answer they have given or should have given. One example is if they do not answer a question for which you have checked Require Answer in the Question Instructions window.

➢ Do not change any of these labels at this time.

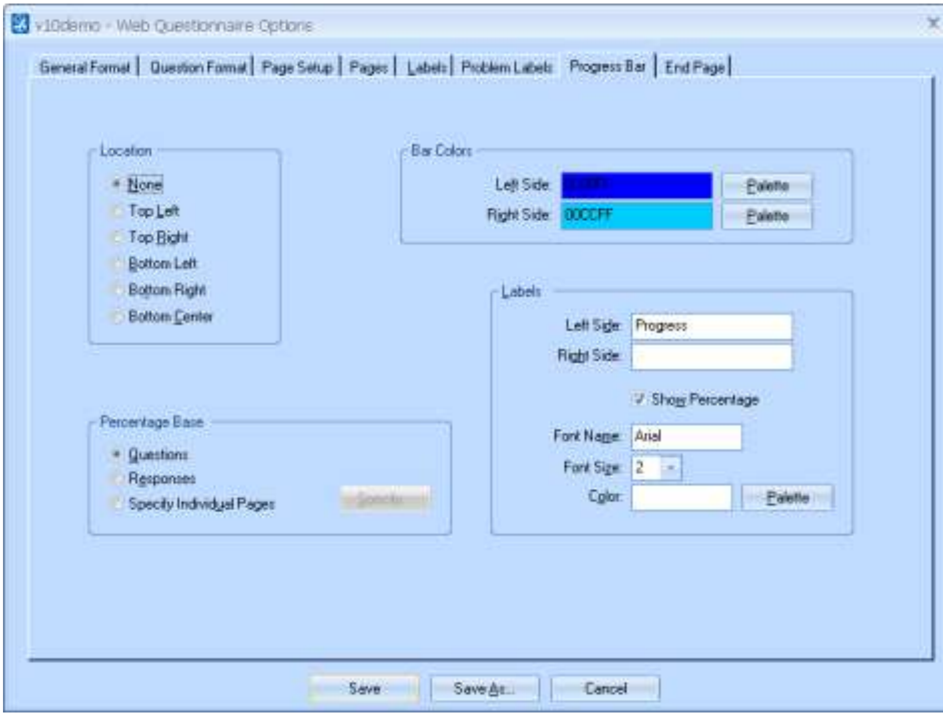


The Progress Bar Page

➢ Click on the **Progress Bar** tab.

The Progress Bar page displays a thermometer-type bar that tells people how far along they are in the survey. Some researchers feel this encourages people to continue with the survey and not drop out by giving them feedback about how far along they are in the survey. The various options on this page let you customize the location and appearance of the bar and its labels and the exact meaning of the percentages displayed.

➢ Do not make any changes to this page.

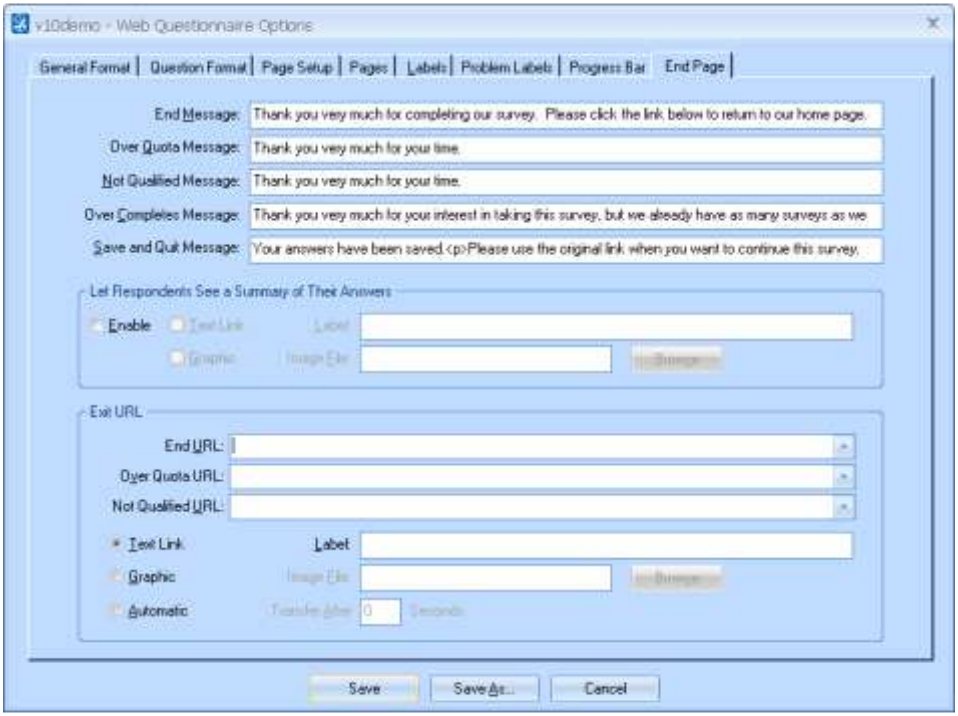


The End Page Page

➢ Click on the **End Page** tab.

The Survey System creates end or final pages for each survey. Respondents will see the **End Message**, if they complete the survey. This is usually a message thanking people for completing the survey. The other messages appear as a final page if someone is taken out of the survey before the end, because of a quota or a similar reason.

Let Respondents See a Summary of Their Answers – Lets you show respondents a page that summarizes all their answers in a non-editable form. You must set up Web reports (discussed later) in order to use this choice.



Exit URL – If you want to direct people to go to a particular Web page from this page, you can enter its URL as the **End URL**. Be sure to start the URL with "http://" unless you are sure those characters are not needed.

You can use text or a graphic for people to click on to follow the link to that URL. You can also have the browser automatically go to the new page after a specified number of seconds. If you check **Text Link** and do not enter any text, no link will appear.

- Enter "**http://www.surveysystem.com**" in the **End URL** Field.
- Click on **Text Link** and type "The Survey System" as the **Label**.

Saving Your Choices

- Click the **Save** button on the bottom of the window to bring up the Save As window.

You can save different sets of choices as different **Web Options Files**. This feature lets you easily switch between different groups of choices when working on different projects or for different clients.

- Enter a name in the Save As window and click **Save**.

When you have saved the options, The Survey System will take you back to the Create Web Questionnaire window.

Creating the New Web Questionnaire

- When you are back in the Create Web Questionnaire window, click **Create** to create the modified questionnaire and click **OK** when it is done.

- Click on the **View in Browser** button to view the changes you made using the Web Questionnaire Options window.

- Close the browser, but keep the Create Web Questionnaire window open.

You can close the browser, make changes, create the Web Questionnaire again and preview the new questionnaire. The Preview Browser lets you fine-tune your survey easily prior to sending it to the Web.

You must create a **Data File** to upload to the site with the other survey files. You can do this while still in the Create Web Questionnaire window.

- Click on **Create Data File**. The Data File for a Web survey must always have the same name as the Question File, so the program does not show the Save As window.

- The Survey System will create a Data File and show you the **Done** window. Click OK.
- Close the Create Web Questionnaire window.

Transferring Files to a Web Site

After creating the Web questionnaire you must copy the study's files to the Web site you will use. The method to use depends on your destination site.

Since this tutorial uses **surveydemo.com**, you must use The Survey System's file transfer feature.

If you use **another site** without a direct network connection, you can use the file transfer feature or another **FTP** (File Transfer Protocol) program.

If you use your own PC as a server and the current location of your Question File ***is*** the data path, you do not need to move the files.

The Survey System's File Transfer Feature

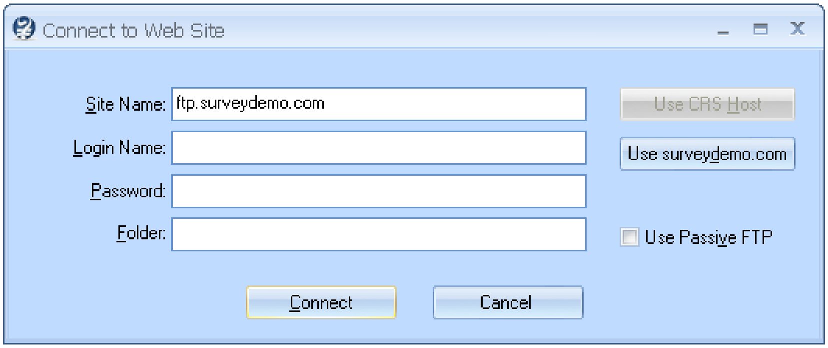
Most people find using The Survey System to transfer files more convenient than using other programs, since it knows which files to send. If you use another program, you must tell it which files to send. If you wish to use another program, see the **Uploading Web Questionnaires** and **Internet File Transfer** help topics for details on which files to send.

- Start your Web connection, if it is not on already.
- Select **Web/Transfer Files** from the main menu.

The Internet File Transfer window will open.

- Enter the name of your **Question File** in that field, if it is not already there.
- Click on the **Connect** button.

The Connect to Web Site window will open.



- If you are using Surveydemo.com, click on the **Use surveydemo.com** button. The Survey System will fill in the **Site Name** field and disable the others. Otherwise enter the Site Name, Login Name and Password needed for your site. You can also specify a Folder.

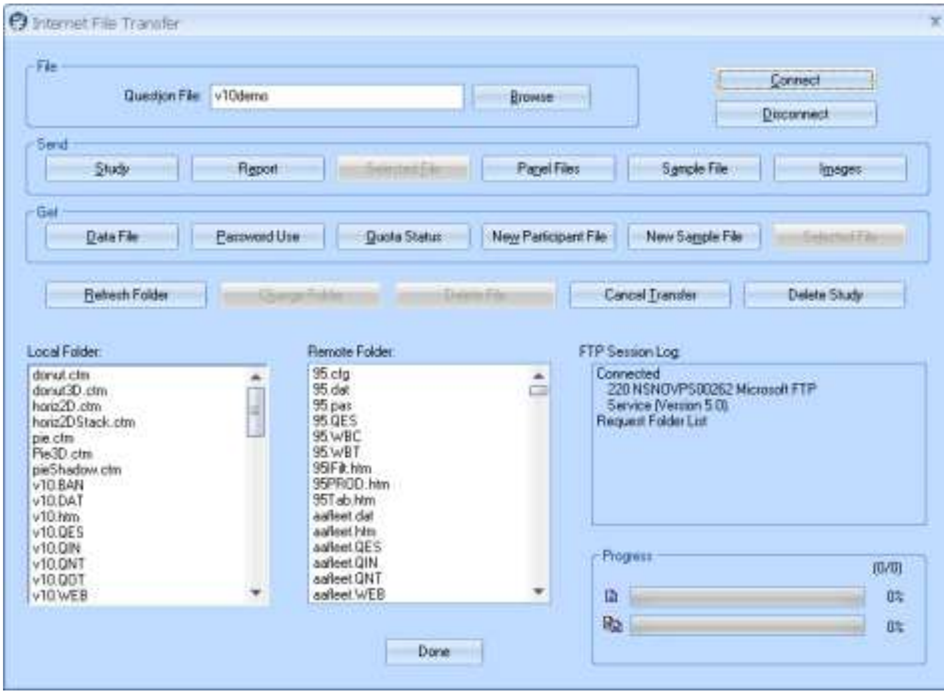
The **Use CRS Host** button will be enabled, if we are hosting your survey on our main (not demo) server.

- If not using surveydemo.com or CRS Host, you must also click **Connect**.

The Survey System will connect to the site and return to the Internet File Transfer window.

The **Local Folder** box shows the files in the same folder as the current Question File. You can only send files from this folder to the Web site. The **Remote Folder** box shows the files in the current folder at the Web site (neither box will match the illustration). The **FTP Session Log** box shows messages to and from the FTP server at the Web site.

The Survey System automatically updates the remote folder list when it connects to a folder and also after you use the **Send Study** button. At other times, you can update this list by using the **Refresh Folder** button.



Folders that are sub-folders of the current folder appear at the top of the list and have a **slash** (/) following their names. If you are not connected to the correct folder at the Web site, you can double-click on the desired folder or highlight it and use the **Change Folder** button.

ⓘ The **Change Folder** and **Delete File** buttons are disabled when you use surveydemo.com.

If CRS is not hosting your survey, there will be two periods (..) at the top of the remote directory list representing the folder one level up from the current one. You can highlight them to go up one level.

➢ Click on the **Send** button in the **Study** section.

Sending the First Page

The Survey System will ask if you want to send the first page to your site. Some people give that page a different name from the rest of the study to prevent people from knowing the names of the files they are using. If The Survey System automatically sent the first page to the same folder as the other pages, it would nullify this security advantage.

- If the **send first page** choice appears, select **Yes** to indicate you wish to send the first page to the remote folder.

The Survey System will send all the files needed for your study to the site. The names of the files it is sending are shown in the **FTP Session Log** box. A "Transfer Complete" message will appear below each file name. The word "Done" will appear at the bottom of the log.

ⓘ If you do **not see** a **Transfer Complete** message after each file in the Session Log, **the transfer did not work.** If so, contact your webmaster to learn whether there are any restrictions on the site preventing you from using FTP. If there is a firewall on your PC or network, you may need to tell it to permit The Survey System to send files.

Sending Graphics Files to the Server

The **Send Study** button sends any graphics files that are used on the first page of your survey to the server.

It does not send graphics files that are only used on later pages, because graphics that will appear after the first page of a questionnaire must be put into the same folder as SSWEB. This is usually a different folder from the one to which you send the other files (which is the folder named in the data path). If your survey includes graphics on later pages, you can change to the SSWEB folder using the Remote Directory List. Then use the Send Images button to send all the images used in your survey to the current remote folder.

If a particular image (such as a logo) appears on both the first page and on later pages, it must be sent into *both* the folder with the first page *and* the folder that has SSWEB (the folder specified in the SSWEB URL).

ⓘ Because of the shared nature of surveydemo.com, you cannot send files to its SSWEB folder. For this reason graphics you create can only appear on the first page when you use this site. The sample graphic radio buttons and sliders provided with the program will appear on all pages. You will be able to see your graphics on all pages when you use your own site or regular CRS hosting.

- Click the Done button and return to the main menu**.**

Testing Your Web Questionnaire

If you are using your own Web site, you must copy SSWEB to it and configure the site to let it run, if you have not already done so. See **Uploading the Survey and Report Servers** help topic for details.

- After sending all your files to the Web site and closing the Transfer Files window, open your usual Web browser and enter the URL of the first page.

If you are using surveydemo.com, the URL to enter is:

http://www.surveydemo.com/trial/YourFileName.htm

- Replace "**YourFileName**" with the actual name you gave your first page.

ⓘ Note that some Web servers are case sensitive.

- You can now test your Web questionnaire.

If you experience any problems when you test the questionnaire, please see the **Web Survey Problems** help topics.

ⓘ After testing a real survey, upload an empty Data File up to the server when you are ready to "go live." Otherwise the test data will become part of the actual survey data. To send a file: Select **Transfer Files**, **Connect** to your web site, either double-click on the Data File in the Local Folder, or select it and then use the **Send File** button. This will overwrite the test version of the Data File on your web site. Alternatively, you could use the **Send Study** button again, answering Yes when the program asks if you want to overwrite the Data File.

You have now successfully set up and tested your first Web Survey.

Designing Web Surveys

The Help File has more information on other aspects of Web surveys. For example you can use passwords to control who can take your survey and combine survey answers with pre-existing information you have about the respondents, send email invitations to take your survey and receive respondent IDs from a sample supplier and redirect respondents back to the supplier at the end of the survey. You can see this information by expanding the **Web Page Surveys** and **Web Survey Participants** sections in the Contents List of the Help File.

Creative Research System's Web site shows several sample surveys using different options (**www.surveysystem.com/web-surveys.htm).** See also **www.surveysystem.com/sdesign.htm** for more information about survey design.

Chapter 7: Web Reports

The Survey System can produce tables, graphics and verbatim comment reports on the Web. These reports can show live results of a Web survey. You can also post results of non-web surveys on the Web to make them available to clients or colleagues.

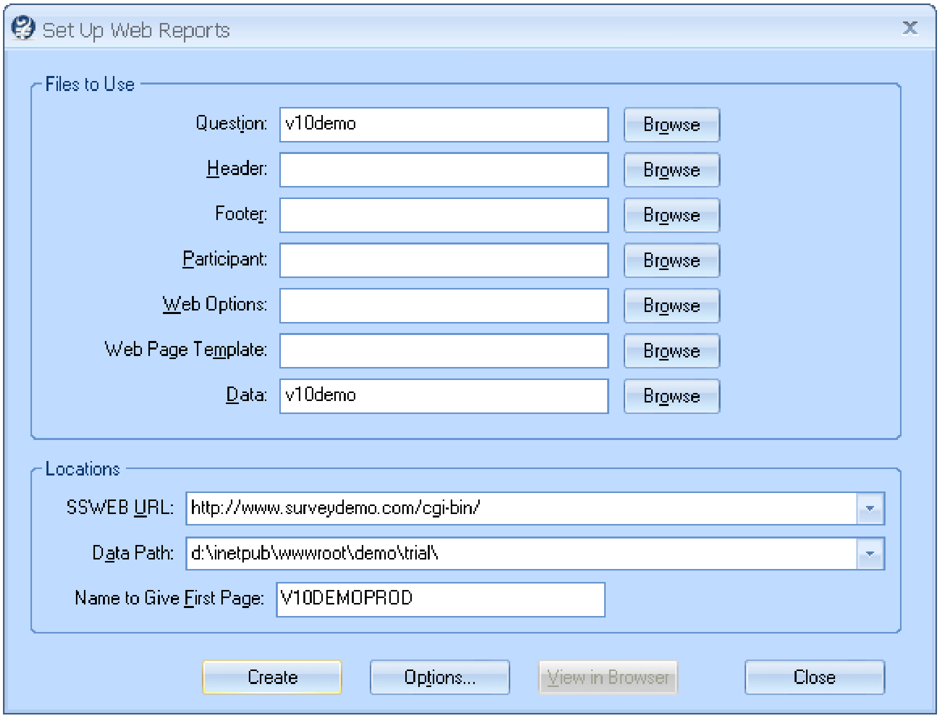
Table content and most table appearance choices, plus Format, Banner and Weight Files affect tables on the Web in the same ways as they affect desktop tables. Together with the Web-specific options, these choices enable you to produce more sophisticated reports on the Web than other Web survey products. In this chapter, we will set up Web reports for the questionnaire we created previously. This is a brief introduction to get you started with Web Reports, not a detailed examination of all the options available to customize your reports. The **Web Reports** and subsequent help topics provide a fuller discussion of Web reports.

- Answer your Web survey a few times (if you have not already done so), so you have some data to see in the reports. Be sure to choose "Other" as an answer to the second question a couple of times and enter some text in the answer space, so you have verbatim answers to see in the report.

The Set Up Web Reports Window

- Select **Web/Set Up Reports** from the main menu.

The Set Up Web Reports window will open.



Files to Use

The **Files to Use** section of this window is the same as in the Create Web Questionnaire window, with two exceptions. One is that there is no space to enter a Survey ID File. That kind of file is not used with Web reports. The other is that there is a space to enter a **Data File**. Web questionnaires always use Data Files with the same name as the Question File. Web reports do not have this restriction. This means you can use one Question File for a questionnaire and another to produce reports. Using a second Question File for reports would let you change the labels. You do not need to use a second Question File to exclude some questions from your reports; the **Exclude from Web Reports** choice in each question's Web Options window lets you do that.

- Enter "YourFileName" as the name for the Question, Web Options, and Data Files.

Locations

The **Locations** section of this window is identical to the one in the Create Web Questionnaire window.

- The **SSWEB URL** and **Data Path** you used to create the Web Questionnaire should appear as defaults. If not, select them from the drop-down lists.

The SSWEB URL and The Data Path for surveydemo.com are:

URL http://www.surveydemo.com/cgi-bin

Data Path d:\inetpub\wwwroot\demo\trial

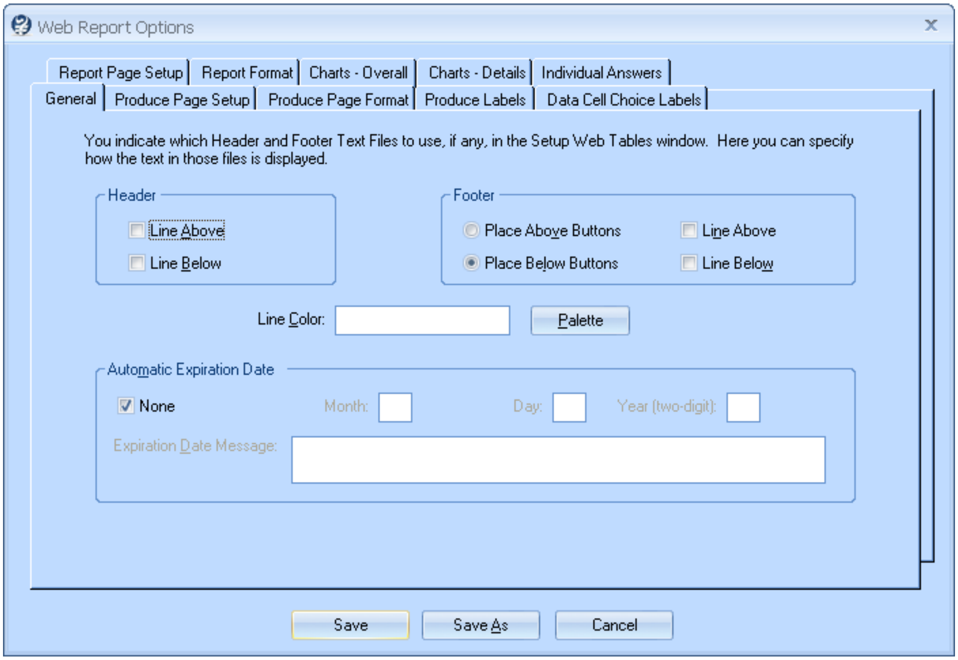
- Either leave the **Name to Give First Page** blank, or enter a name you want to use. It must be different from the first page of your Web questionnaire.

Web Report Pages

When you click the **Create** button in this window, The Survey System will create two Web pages: The **Produce Page** is the Web page that people will see to select which reports they want to produce. It will always show a list of questions. It also offers many other options. The **Report Page** is a skeleton Web page that will be used to show the reports themselves.

Report Options

- Click on the **Options** button to open the Web Report Options window.

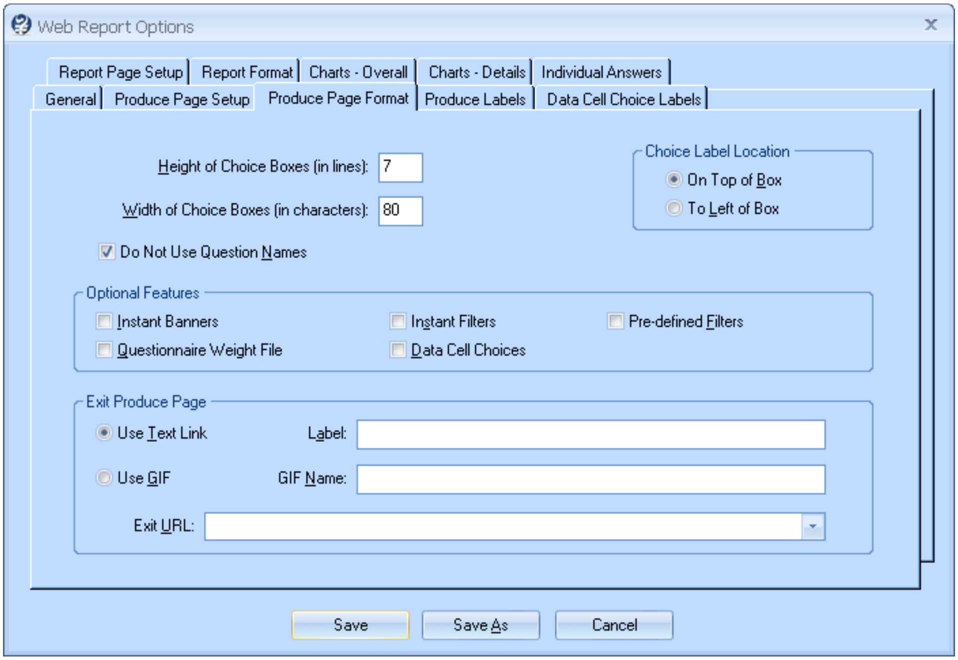


This window has ten pages. Some of these modify the Produce Page, others modify the Report Page. We describe the pages of this window briefly here. Each page has an associated help topic that describes each choice on the page in detail. You can view each page's help topic most easily by pressing the **F1** key while you are viewing that page.

The first two pages, **General** and **Produce Page Setup**, determine the general appearance of the Produce page. They are very similar to the first two pages in the Web Questionnaire Options window.

The **Produce Page Format** page determines how the list of questions is shown and what other choices people using the Produce page will have.

- Click on the **Produce Page Format** tab.



The **Optional Features** choices are the key parts of this page. They determine in which ways users can modify reports. If you do not select any options, users will only be able to select which question to see. Selecting choices like Instant Banners and Instant Filters lets users analyze the data in more detail.

- Check **Instant Banners**. You will probably want to allow this option most of the time. It lets people crosstab questions by each other.

The **Produce Labels** and **Data Cell Choice Labels** pages of the Web Report Options window determine the labels that will appear on the Produce Page. Data cell choices only appear if you select the Data Cell Choices box in the Optional Features section of the Produce Page Format page. If you make the label for an individual data cell choice blank, that choice will not appear on the Produce page.

The **Report Page Setup** page lets you determine the background and margins of the Report Page. The **Report Format** page offers some report appearance choices.

- Select the **Report Format** tab**.**

- Select **Centered**, **Single Grid Lines**, **Odd** and **Even Row Colors**.

The **Charts – Overall** page determines the default type of chart – pie, bar, or column (vertical bar) – for each type of question and whether they appear in 2D or 3D form. You can specify a chart type for an individual question in the Question Instructions: Web Options window.

This page also lets you choose whether charts appear by themselves or on the same pages as tables, the size of the charts and the font used for their labels.

- Select **3D**.

- Select an **Overall Chart** Background Color. You can also select a **Gradient** color below it, if you like that effect.

The **Charts - Details** page determines the colors used in the charts and several other options.

- Select **Bars as Cylinders** in the Options section.

- Click the **Save** button to return to the Set Up Web Reports window. The same Web Options File can save choices for both questionnaires and reports, which makes it easy to save all the options for a project in one place.

- Click **Create.**

You can view the Produce and Report pages by clicking on **View in Browser**. The Report page will not show any actual reports at this time, just the space where they will appear.

Transferring Report Files to Your Web Site

The last step before producing reports on the Web is to transfer the files to a Web site. If you are not using surveydemo.com, and you did not copy the Report Server (SSWEBT10.CGI) and the graphic applet file to your Web site when you copied the Survey Server there, please do so now (see the **Uploading the Survey and Report Server** help topic).

- Click **Close,** if you are still in the Set Up Web Reports window.
- Select **Transfer Files** from the Web menu**.**
- Click on **Connect** to bring up the Connect to Web Site window.
- If using surveydemo.com, click on **Use surveydemo.com**. If you are using another site, enter the **Site Name**, **Login Name**, **Password**, and **Folder** for your site. The ones you previously used should appear as defaults.
- Click on **Connect**, if not using surveydemo.com.

The Survey System will connect to the Web site and take you back to the Internet File Transfer window.

- Click **Report** in the Send section.
- If The Survey System asks if you want to send the first page, answer **Yes**.

- If it says there is already a Data File in the remote directory and asks if you want to overwrite it, answer **No**. If you answer **Yes**, you will replace the file at the Web site with one from your PC (with none of the test data you entered).

The Survey System will send all the files needed for your Web reports to the Web site. This will include any Banner, Format, and Weight Files specified in the Question File. As when sending Web questionnaires, the one exception is any graphics files. All image files must go into the same folder as SSWEB. Images that are going to appear on the Produce Page must also go in the same folder as that page (The Survey System does this automatically when you use the Send Report button).

- When the transfer is complete, click **Done** to close the File Transfer window.

If you are using a program other than The Survey System to send your report files to a Web site, please see the **Uploading Web Reports** help topic for a list of which files you need to send.

Testing Your Web Reports

You can now see your Web Reports.

- Open your browser and enter the URL of your Produce Page.

If you are using surveydemo.com, the URL will be:

http://www.surveydemo.com/trial/YourFileNamePROD.htm

where "YourFileNamePROD" is the name you gave the first page of the report.

- Experiment with different choices on the Produce Page.

Click on the **Produce Tables** button to produce tables and verbatim reports. Click on **Produce Charts** to produce charts and verbatim reports. Choices on the

Charts – Overall page of the Web Report Options window can let you see both tables and charts at the same time.

You can select more than one question in the Tables to Produce box by holding down the Ctrl Key as you select the second and subsequent questions. If you do not select any questions, The Survey System will produce all of them, one after another.

You can select a question from the Instant Banner box. If you do not select an instant banner, The Survey System will show any banners specified in the Question File.

The first time you produce a chart; there will be a slight pause while your browser downloads the chart applet from the server. You will probably see a Java logo or a gray box the size of the chart while waiting. Later in the same session charts will appear more quickly.

You can rotate pie charts with your mouse.

You have now completed the tutorial. There are many more options and features in The Survey System than we can cover in tutorial form. Experiment with them as you wish. We will be here to help with any questions you might have. We wish you great success with your surveys!