Askia Training

Course 300

Askia Field introductory training

Participant's Coursebook

Version 1.2. June 2015.
Compatible with Askia Field versions from to 5.3.3.

askia

Contents

Introduction

Format

This course comprises seven flexible modular sessions, which permit different learning pathways through the training course. It is primarily intended for fieldwork supervisors and managers who will be working with Askia to administer surveys online, by telephone (CATI), or face-to-face with CAPI. It is also relevant to research technicians, CAI (computer-assisted interviewing) scriptwriters or even researchers who, after creating surveys in Askia, will be involved in deploying these to fieldwork, or supporting fieldwork managers in their use of the Askia software.

Each session is intended to last no more than an hour, and some of the modules in this course last considerably less than that.

Each session follows the same format:

1. Introduction (by tutor) 2-3 minutes
2. Tutorial and demonstration 10-20 minutes
3. Summary (by tutor) 2 minutes
4. Practical exercises variable
5. Recap, feedback and questions

Module topics

Session 301	Askia Field concepts
Session 302	Setting up a survey
Session 303	Preparing projects for fieldwork
Session 304	Web survey operations *WEB ONLY*
Session 305	CATI and CAPI operations *CATI AND CAPI ONLY*
Session 306	Quotas
Session 307	Call-backs and dialling methods *CATI ONLY*
Session 308	Monitoring fieldwork activities
Session 309	Viewing, editing and coding results

Recommended learning pathways

All the modules of this course are considered to be 'core modules' and should be followed in sequence. However, modules 304 to 307 are mode specific, and if some modes are not in use by the client, then some of these modules may be omitted entirely.

Within each module, there is content which is specific to one or sometimes two of these modes. This is indicated in the heading that starts the relevant section, with a suffix appearing after the heading, e.g. *CATI ONLY*

Two example tracks, for web only or CATI only delivery, are shown below:

Web only track

Session 301	Askia Field concepts
Session 302	Setting up a survey
Session 303	Preparing projects for fieldwork
Session 304	Web survey operations
~~Session 305~~	~~CATI and CAPI operations~~
Session 306	Quotas
~~Session 307~~	~~Call-backs and dialling methods~~
Session 308	Monitoring fieldwork activities
Session 309	Viewing, editing and coding results

CATI only track

Session 301	Askia Field concepts
Session 302	Setting up a survey
Session 303	Preparing projects for fieldwork
~~Session 304~~	~~Web survey operations~~
Session 305	CATI and CAPI operations
Session 306	Quotas
Session 307	Call-backs and dialling methods
Session 308	Monitoring fieldwork activities
Session 309	Viewing, editing and coding results

Short modules

Because some of the material within some of the modules is specific to a particular mode, if you are not teaching all modes, this may occasionally result in a very short module to deliver. Where this occurs, you may prefer to run on from one module to the next.

Short modules which may be amenable to being combined are modules 305 and 307 or modules 306 and 307.

Session 301 Askia Field Concepts

Outline

Topics presented

In this session, we will introduce you to:

- The Field modules of the Askia suite
- *CATI ONLY* Working with an integrated dialler
- Logging in and connecting
- Workspaces

Learning outcomes

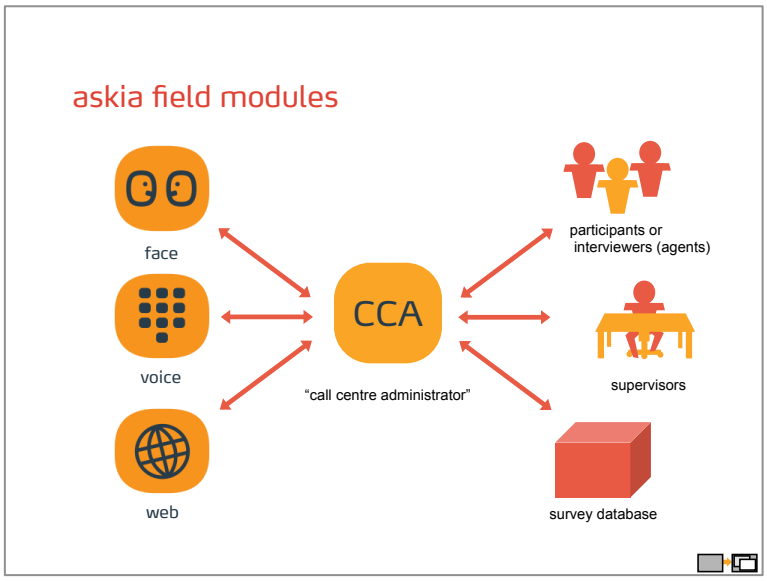
At the end of this session you will understand:

- The different field modules within the Askia software suite
- The additional functions that an integrated dialler provides
- How to connect and create a Workspace
- How to organise your Workspaces
- The role of the CCA background process

Material covered

Modules in the Askia Suite

Field modules



How to log in and connect

Logging in

To start askiafield **supervisor**, double-click the icon on your desktop. Alternatively, you can open your computer's **start menu**, click **all programs**, open the **askia** program group, and click **supervisor** as appropriate.

Select your user name from the list that appears, then enter your password. Finally, if prompted to, you need to select a location from the list.

Simplifying the logon

You can alter the properties of the supervisor shortcut, in order to automatically log in and open a specific workspace. The following procedure assumes that you know how to create and edit shortcuts in Microsoft Windows.

Add the following parameters to the Windows shortcut target in order to automate the login procedure:

-user:<user name>

-password:<password>

-CCA: <nnn.nnn.n.n>

Where <user name> and <password> are the user's login credentials and <nnn.nnn.n.n> is the IP address of the machine on which the CCA is running).

Workspaces

Agents *CATI AND CAPI*

Roles for agents

Askiafield allows agents to be allocated different roles. Typically, you will have supervisors and standard agents. By defining restriction patterns for each role, you can control what access each user has to the various areas of the software. See below for details on assigning restriction patterns to an agent.

Setting up an agent

Agents can be defined by supervisors (that is, agents with the "supervisor" role).

To set up a new agent:

1. If the *agents* window is not visible, click **agents** in the ribbon's **view** tab.
2. In the *agents* window, right-click and select **new**.
3. In **name**, enter the user name that will appear on screen for the agent, and which he or she will use to log in. This must be unique – askiafield will not allow you to create an agent with the same name as an existing one.
4. In **password**, enter the password the user will enter during login.
5. Record other details (**first name**, **last name**, **email**, etc.), as appropriate.
6. Click the **skills** tab, and, if any skills apply to this agent (e.g. languages spoken), set these to 1.
7. Click **OK**. The agent is created.

Editing an existing agent

Editing an agent is very similar to creating a new one.

To edit an existing agent:

1. If the *agents* window is not visible, click **agents** in the ribbon's **view** tab.
2. In the *agents* window, double-click the agent you wish to edit.
3. Change the details, as appropriate, and click **OK** to confirm your changes.

Agent roles: restrictions

You can control what functionality an agent has access to, by specifying which **restriction** applies to them. A restriction is a set of permissions, which control access to the various program functions in askiafield. You might, for example, have a restriction level for normal agents, and another for supervisors.

To set restrictions on an agent:

1. If the *agents* window is not visible, click **agents** in the ribbon's **view** tab.
2. In the *agents* window, double-click the agent.
3. Next to **restrictions**, click **…**.
4. Select the appropriate restriction for the agent, and click **OK**.

For details on defining your own restriction patterns, please refer to the Askiafield Assistant.

Working with a Dialler *DIALLER ONLY*

If you have an automatic dialler set up, then agents do not need to manually dial telephone numbers. Instead, askiafield will dial the calls for them. A dialler also allows you to record or listen to calls as they are made.

Audio monitoring and recording

A dialler allows you "listen in" to calls while they are in progress. You can either listen in to the current activity of an agent in the list, or to a specific call.

To "listen in" to a specific call:

1. If the *calls* window is not visible, click **calls** in the ribbon's **view** tab.
2. In the *calls* window, right-click the call you want to listen to, and select **listen**.

To "listen in" to an agent:

1. If the *agents* window is not visible, click **calls** in the ribbon's **view** tab.
2. In the *agent* window, right-click the agent you want to listen to, and select **listen in**.

The dialler also allows you to record calls. This is done from the calls window.

To record a specific call:

1. If the *calls* window is not visible, click **calls** in the ribbon's **view** tab.
2. In the *calls* window, right-click the call you want to record, and select **record**.

Listening back to a recording:

1. If the *recordings* window is not visible, click **recordings** in the ribbon's **view** tab.

2. Right-click the recording and select **play**.

Note that the *recordings* window displays recordings made from the *calls* window, as described above. For recordings made by other methods (e.g. from the task properties, or from routing in the survey), recordings are saved as .wav files in the survey's work directory, and can be listened to in any external program that can play this format.

Recap

In this session, we have:

- Looked at the different field modules and interviewing modes in askiafield
- Connected and logged in as a supervisor
- Created workspaces for different survey modes
- Defined agents and examined the different roles of agents
- *CATI only:* Looked at the additional capabilities a dialer can provide

Practical exercise

Getting started

Follow these steps:

1. Start askiafield **supervisor** and log in with the login credentials your tutor has given you.
2. If the **agents** window is not visible, select it from the **view** tab of the ribbon.
3. In the agents window, right-click and select **new**.
4. Enter details for one of your colleagues on the course (**name**, **email**, **password**).
5. In **restrictions**, apply an appropriate restriction pattern so that your colleague is set up as a supervisor.
6. Click **OK** to create the new agent.
7. In the **view** tab of the ribbon, open the **presets** list, and select a different workspace.
8. Re-arrange the window layout (choose which windows are visible, and change their positions and sizes).
9. In the **presets** list, select **save as…**.
10. Type a name for your workspace, and click **OK**. Your new workspace can now be loaded from the **presets** list.

Session 302 Setting up a survey

Outline

Topics

In this session, you will learn about:

- Survey initialisation
- Creating a field task
- Selecting files and the work directory
- Survey options

Learning outcomes

After this session, you will be able to:

- Set up a survey task
- Understand which files and directories are involved
- Control how incomplete interviews are handled, and what navigation is allowed during the interview

Material covered

Survey initialisation

Files used

When setting up a survey in askiafield, you first need a questionnaire file (QES or QEX). This should be created first, in askiadesign. You can then upload the file to the askiafield CCA.

Creating a task

An active survey in askia is represented as a **task**. When setting up a survey, you first need to create the task.

To set up a survey in askiafield:

1. If the *tasks* window is not visible, select **tasks** in the ribbon's **view** tab.
2. In the *tasks* window, right-click anywhere, and select **new survey**.
3. In **name**, enter a suitable name for the survey. This will appear in the tasks window, so it should clearly identify the survey. You should avoid using spaces or special characters in the survey name.
4. Next to path, click **…**.
5. If the QES or QEX file is on the askiafield CCA machine, or a network drive accessible from the askiafield CCA machine, click **select remote file accessible by the CCA**. Then, browse the available discs, select the QES or QEX file and click **open**. Then, skip to step 8.
6. If the QES or QEX file is on your computer's hard drive, or a network drive accessible from your computer, click **select local file to upload**. Then, select the QES or QEX file, and click **open**.
7. By default, the **work directory** is where the QES file is located, and it is where the data will be stored. Normally, you do not need to change this. However, if you plan to automatically record call audio (using routing in the survey, or from the task properties), then you may want to specify a different location, as this is where the recordings (as WAV files) are saved.
8. In **target sample size**, enter the number of completed interviews you want for this survey task.
9. Click **OK**. The survey task is created.

Note that you can skip steps 2 and 6 above by dragging a QES or QEX file directly into the tasks window. A new task will be created, based on the file you dropped into the tasks window.

You can change the details of a survey task.

To edit a survey task:

1. If the *tasks* window is not visible, select **tasks** in the ribbon's **view** tab.
2. In the *tasks* window, double-click the survey you want to edit.

Survey options

In addition to the options described above, the main options for a survey are as follows. You can set these when you first set up the survey, or when you subsequently edit it.

Description — Allows you to provide a brief description of the survey, which will be visible in WebProd (i.e. the web interface for managing web surveys).

Path — This is the location of the QES file.

Work directory — This is the location that any audio files are saved, if you are automatically recording calls.

Keep incomplete interviews — If you select this option, then interview data will always be kept, no matter the call outcome. If it is, for example, out of quota, the data will still be kept.

Note that if, during an interview, a "go without saving" routing is triggered, then the data will not be saved, irrespective of this setting.

Interview storage — Controls where and how interview data will be stored: QES file, SQL database or SQL database (legacy format). Your course tutor will advise you on which format is used by your organisation.

You cannot change this option once the survey is live.

Survey progression — This determines the available navigation options during CATI surveys *CATI ONLY*. The options are as follows:

- **Forward move only:** CATI agents may move forwards through the interview only.
- **Backward and Forward:** Agents may move backwards and forwards within the questionnaire.
- **Authorise jump backward:** Agents may select a specific question earlier in the questionnaire and go directly to it.
- **Authorise jump anywhere:** Agents may go directly to any question.

Field list — Makes the selected Askia askiafield CCA system fields and sample list fields visible to agents.

Recap

In this session on setting up a survey, we have:

- Created a task in Askia for a new survey.

- Looked at the files used by Askia when defining a survey – the QEX or QES file.
- Looked at the work directory
- Set different survey options on the **general** tab of the survey task

Practical exercise

Setting up a new survey

In this exercise, and the subsequent ones in this course, you will be setting up and working with a survey task. Your tutor will provide you with a QEX file, along with sample files. If you took part in the askiadesign course, you might like to use the survey you created there.

Follow these steps:

1. If you are not already logged into askiafield **supervisor**, open the application and log in.
2. Open the **tasks** window, if it is not already visible (click **tasks** in the ribbon's **view** tab).
3. Create a new survey task (in the *tasks* window, right-click and select **new survey**).
4. Select your QES or QEX file (next to **path**, click **…**, and then click **select local file to upload**.
5. Enter a suitable name and description for your survey, and select an appropriate target sample size.
6. Ensure that **use SQL server** is selected.
7. Set the **target sample size** field to an appropriate size (e.g. 1000).
8. Click **OK** to create your survey task.

Session 303 Preparing projects for fieldwork

Outline

Topics

In this session, we will introduce you to:

- *CATI AND WEB* Sample files and lists
- *CATI AND WEB* The Lister program
- *WEB ONLY* Working with external panels
- Agents and Tasks
- *CATI AND CAPI ONLY* Groups

Learning outcomes

After this session, you will be able to:

- Define and add sample
- User Lister to format sample
- Assign agents to work on different projects
- *CATI ONLY* Define groups for CATI
- *CAPI ONLY* Define groups for CAPI

Material covered

How Askia uses sample *CATI AND WEB*

All surveys have samples – i.e. those invited to take part in the survey. However, for CATI and web surveys to operate, the system must be provided with a list of contacts in advance – which we call the *sample file*.

We either provide this ourselves, use an external sample provider or interface with an external panel.

Providing your own sample

You can provide sample in the following formats:

- Excel
- Access

Sample fields

The following fields can be used in the sample file:

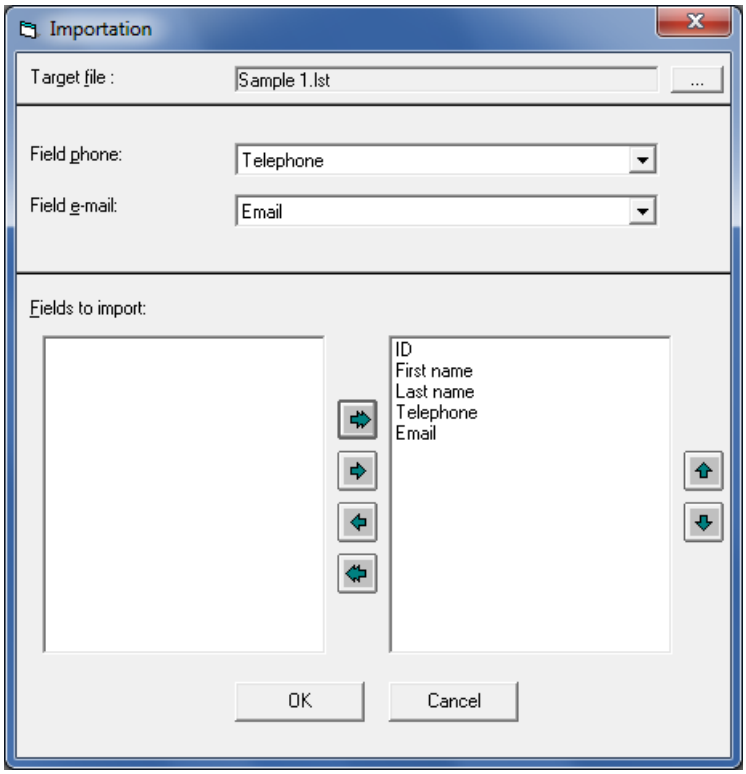
- Telephone for CATI
- Email for CAWI
- Other optional fields such as contact name, demographic information, sample ID or customer number.

Using Lister

Askiafield uses a special file format for sample lists, with the suffix LST. However, you can easily transform your Excel and Access sample lists into LST files with **Lister**.

To transform an Excel or Access file using Lister:

1. Ensure your Excel file is saved in XLS format.
2. To start Lister, open the Windows **start menu** and click **all programs.** Click **askia**, then **askialister**.
3. In the **file** menu, select **import**, then **Excel** or **Access**.
4. Select your XLS or MDB file. The importation window appears:



5. Click **…** next to **target file**, and specify a location and file name for the LST file.
6. In **field phone**, select the field that contains the phone numbers, if applicable.
7. In **field email**, select the field that contains the email addresses, if applicable.
8. In **fields to import**, ensure the fields you want to include in the LST file are in the right-hand list. To move a field to this list, select it and click the right arrow. You can move items out of the right-hand list by selecting them and clicking the left arrow. To change the order of items in the right-hand list, select them and move them with the up and down arrows.
9. Click **OK**. The LST file is created.

Using a panel *WEB ONLY*

When using a panel provider, you will connect your survey with the provider's panel contacts by using an anonymous ID, because the panel provider will not provide you with a list of their respondent's email addresses.

Instead, you control access to your survey, and they control access to their panel by exchanging links. You will provide them with a survey link so that they can invite their selected panel members to your survey. They will also provide you with links so that you can redirect participants back to the panel provider's webpages at the end of the survey, so that the panel provider can register that they have participated (e.g. to apply an incentive, or to issue a reminder).

Askia allows you to provide survey links two ways, which reflect the ways that most panel providers operate:

1. Your panel provider generates the ID and issues the invitations – for this you need to create a model link for them to use, which will identify them as an external panel provider.
2. You provide the panel provider with a series of generated links, or one link and a series of unique identifies for the panel provider to use.

At the end of the survey, the panel provider will expect that the survey ends with a link which redirects the participant back to their panel webpage, so that they can credit the panel member, and there will usually be different redirection links written into the survey for complete and incomplete interviews. These links are written into the questionnaire in the Design module.

In addition to this, you may also need to provide them with test links, and they may also provide you with test links to use for the redirection at the end.

Links will be covered in more detail in Session 304.

Adding sample *CATI AND WEB*

Attaching a single list

This explains how to attach a single list, and associate it with your task

Before you commence fieldwork on a project, you need to add one or more sample files to the system, and attach them to your survey task. Once this is done, the fieldwork is ready to be deployed.

To add a sample file to the system, and associate it with your task:

1. If the *sample lists* window is not visible, select **contact lists** in the ribbon's **view** tab.
2. Right-click anywhere in the window, and select **new sample list**.
3. In name, type a name for the list. This should be a recognisable description, so that you (and your co-workers) can identify the list.
4. Select **LST file**, and then click **…**.
5. If the LST file is on the askiafield CCA machine, or a network drive accessible from the askiafield CCA machine, click **select remote file accessible by CCA…**. Then, browse the available discs, select the LST file and click **open**. Then, skip to step 7.
6. If the LST file is on a disk drive accessible from your computer, click **select local file to upload…**. Then, select the LST file, and click **open**.
7. In **target**, select **…** next to **task**.
8. Select your survey task, and click **OK**. Your sample file appears in the *sample lists* window.

You can view the sample files associated with a specific task by viewing the properties for the task.

To view the sample files available to a survey task:

1. If the *tasks* window is not visible, select **tasks** in the ribbon's **view** tab.
2. Double-click the task.
3. Click the **sample lists** tab.

Attaching multiple lists

To associate multiple lists with a survey task, repeat the above procedure for each sample file you want to use with your survey. You can have as many sample files as you like attached to a survey task.

By default, askiafield draws sample from multiple lists simultaneously. However, you can set it to draw sample from each list in turn (i.e. draw all the sample from one list before moving on to another).

To change how askiafield draws sample from multiple lists:

1. If the *tasks* window is not visible, select **tasks** in the ribbon's **view** tab.
2. Double-click the task.
3. Click the **sample lists** tab.
4. Select **finish a list before using a new one** (if you want askiafield to use each list one at a time), or clear this box (if you want askiafield to draw sample from all lists simultaneously).

Groups *CAPI AND CATI*

Groups allow you to assign agents to work on a task. For each group, you can assign a number of agents. For example, you might have a group for each shift. Once you have defined the group, and add the appropriate agents, you can then associate it to your survey task.

Defining Groups in CATI *CATI ONLY*

To create a group for CATI telephony:

1. If the *group hierarchy* window is not visible, select **groups** in the ribbon's **view** tab.
2. Right-click anywhere in the window and select **new outbound group**.
3. In **name**, type a descriptive name for the group.

4. Next to **task**, click **…**.
5. Select your survey task, and click **OK**.
6. Click **OK** to create your group.

Assigning agents to Groups in CATI *CATI ONLY*

Groups in CAPI *CAPI ONLY*

To create a group for CAPI interviewing:

1. If the *group hierarchy* window is not visible, select **groups** in the ribbon's **view** tab.
2. Right-click anywhere in the window and select **new capi group**.
3. In **name**, type a descriptive name for the group.
4. Next to **task**, click **…**.
5. Select your survey task, and click **OK**.
6. Click **OK** to create your group.

Assigning agents to Groups in CAPI *CAPI ONLY*

Once you have created a group, you need to assign agents to it.

For CATI groups, note that each agent can be assigned to *one outbound group only*, as they may only work on one CATI project at a time. If you assign an agent to a new group, they will be removed from their previous group.

For CAPI groups, each agent can be assigned to more than one CAPI group at a time (unlike with CATI groups). Adding an agent to a CAPI group will *not* remove them from other groups they are assigned to.

You can add agents to a group by selecting them from a list, or by dragging them to the group.

To add agents by selecting from a list:

1. If the *group hierarchy* window is not visible, select **groups** in the ribbon's **view** tab.
2. Right-click the group, and select **add agents**.
3. Select the agents you want to add. You can select multiple agents by holding down CTRL as you click them.

4. Click **OK**.

To add agents by dragging them to the group:

1. Ensure the *group hierarchy* and *agents* windows are visible. If they are not, click **groups** and **agents** in the ribbon's **view** tab, as required. Arrange the windows so that you can clearly see both.
2. Drag an agent from the *agents* window to your group in the *group hierarchy* window.
3. Repeat step 2 for each agent you wish to add.

Removing an agent from a group

To remove an agent from a group:

1. If the *group hierarchy* window is not visible, select **groups** in the ribbon's **view** tab.
2. If the agents in the group are not visible, click the small arrow next to the group, in order to display them.
3. Right-click the agent and select **delete**.

Note that if you delete an agent during a telephone interview, that call will continue. Once the call is finished, the agent will not be assigned any further calls from this group.

Recap

In this session on preparing projects for fieldwork, we have:

- *CATI AND WEB* Defined and added sample.
- *CATI AND WEB* Formatted sample using the Lister module.
- *CATI AND CAPI* Created interviewing groups, and added agents to them.

Practical exercises

1. Adding sample

Follow these steps:

1. Open the Excel sample file your tutor gave you, and examine the contents.
2. Open askia**lister**, and open the sample file (in the menu, select **import**, then **Excel**).
3. Click **…** next to **target file**, and specify a location and file name for the LST file.
4. In **field phone**, select the field that contains the phone numbers, if applicable.
5. In **field email**, select the field that contains the email addresses, if applicable.
6. In **fields to import**, move the fields you want to import into the right-hand list by selecting them and clicking the right arrow. Note that if you make a mistake, you can move items back to the left-hand list by selecting them and clicking the left arrow.
7. Click **OK**. The LST file is created.
8. In askia**supervisor**, open the *sample lists* view (in the ribbon's **view** tab, select **contact lists**).
9. Add your LST file to the *sample lists* view (right-click and select **new sample list**).
10. In **name**, enter a descriptive name for the list.
11. Select **LST file**, and then click **…**. Then, click **select local file to upload…**. Select your LST file, and click **open**.
12. In **target**, select **…** next to **task**. Select your survey task and click **OK**. Your sample file appears in the *sample lists* window, with your survey task displayed as the target.

2. Creating a group *CATI ONLY*

In this exercise, we will create a testing group.

Follow these steps:

1. In askia**supervisor**, open the *group hierarchy* view (in the ribbon's **view** tab, select **groups**).
2. Right-click anywhere in the window and select **new outbound group**.
3. In **name**, type *testing group*.
4. Next to **task**, click **…**. Then, select your survey task, and click **OK**.
5. Open the **dialing** tab.

6. Ensure **override defaults** is selected, and then select **brief mode**.
7. Click **OK** to create your group. Notice that next to the group name, your survey name is shown, allowing you to quickly see which task your group is assigned to.
8. Ensure the *group hierarchy* and *agents* windows are visible. If they are not, select **groups** or **agents** in the ribbon's **view** tab. Arrange the windows so that you can clearly see both.
9. Drag one or more agents from the *agents* window to your group in the *group hierarchy* window.

3. Creating a group *WEB AND CAPI ONLY*

Follow these steps:

1. In askia**supervisor**, open the *group hierarchy* view (in the ribbon's **view** tab, select **groups**).
2. Right-click anywhere in the window and select **new outbound group** (for a CATI group) or **new capi group** (for a CAPI group).
3. In **name**, type a descriptive name for the group.
4. Next to **task**, click **…**. Then, your survey task, and click **OK**.
5. Click **OK** to create your group.
6. Ensure the *group hierarchy* and *agents* windows are visible. If they are not, select **groups** or **agents** in the ribbon's **view** tab. Arrange the windows so that you can clearly see both.
7. Drag one or more agents from the *agents* window to your group in the *group hierarchy* window.

Session 304 Web survey operations *(WEB ONLY)*

Outline

Topics

In this session, we will introduce:

- Survey links
- Testing
- Going live with a project
- Activating sample lists
- Invitations and reminders

Learning outcomes

After this session, you will be able to:

- Recognise the components of a survey link
- Create a test link to test a survey
- Make surveys live
- Activate sample
- Prepare and send invitations for web surveys
- Issue reminders automatically

Material covered

Survey links

The survey link is an important component of the online survey process because it is what the respondent uses to access the survey, and a survey link is also used when we wish to test our survey.

Open and Individual links

Survey links may be open or individual to the respondent. Individualised links will restrict access to the survey; open links do not restrict access the survey in any way.

The principal differences are shown here:

Open Links (Unrestricted surveys)	**Individual links (restricted surveys)**
Do not identify the respondent.	Each contain a unique ID for the respondent.
Anyone can follow the link and take the survey.	Cannot access the survey unless you have a valid ID.
Following the link again will always restart the survey from the beginning.	Following the link again will resume the interview from the last point reached until finished.
Anyone can take the survey multiple times.	Can only be used once to complete a survey before the link expires.
Can't track participation at an individual level	Can track participation and issue reminders to non-responders only

Format of a simple open link

```
http://servername/webprod/cgi-bin/AskiaExt.dll
?Action=StartSurvey&SurveyName=yoursurvey
```

Servername

URL of your Askia web production server – always the same for your installation

Webprod etc

Folder and name of the Askia program on the server to execute.

Action=StartSurvey

Directive to Askia to start the interview

SurveyName=*yoursurvey*

Tells Askia which survey to start

Format of a test link

```
http://servername/webprod/cgi-bin/AskiaExt.dll
?Action=StartSurvey&SurveyName=yoursurvey&Test=true
```

Test=true

Interview will execute in test only mode. No data are saved from test mode interviews.

Example:

```
http://show.askia.com/WebProd/cgi-bin/AskiaExt.dll?
Action=StartSurvey&SurveyName=Askia_Training&Test=true
```

Format of an individual respondent-specific link

```
http://servername/webprod/cgi-bin/AskiaExt.dll
?Action=DoPanel&SurveyName=your-survey  &PanelId=value
```

Action=DoPanel

Directs Askia to start the interview and link it to the sample list

PanelId=

Tells Askia the respondent's ID for this interview

Example:

```
http://show.askia.com/WebProd/cgi-bin/AskiaExt.dll?
Action=DoPanel&Survey=LLXCGMWWUIQCQOKT&PanelId=LLXCGMWWUIQCQ
OT@FFMFVYWXVWDDXCPI
```

DoPanel links are usually generated by CCA and are automatically encrypted into a 16-character string, to increase security

Testing and going live

Uploading a web project to the web server

Before you make a web project live, you first have to upload the project to the web server.

To upload a web project to the web server:

1. Open the *tasks* window.
2. Right-click the task and select **properties**.
3. Click the **webprod** tab.
4. Right-click the appropriate WebProd, and select **add this survey**.
5. Ensure **web survey** is selected. This allows you to access the appropriate options for the associated sample lists, such as the **mailing**, **events** and **mail template** tabs.
6. Click **OK**. The survey is now uploaded, but note that it is not yet running.

Testing a Web survey

Web surveys can be run in test mode, where interview data is not saved. This allows you to preview the survey as respondents will see it when it is live.

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click the survey and select **test web survey**. The survey opens, in test mode, in a web browser window.

Going live

Now your project is set up, you can make it live at any time. You need to activate one or more sample lists, and then issue invitation emails to potential respondents.

Before you make your web project live, you need to upload the project to the web server.

To upload a web project:

1. Open the *tasks* window.
2. Right-click the survey task and select **properties**.
3. Click the **webprod** tab.
4. Right-click the appropriate WebProd, and select **add this survey**.
5. Select **web survey**. The appropriate options become available for the sample lists associated with the project.

Once your project has been uploaded to the web server, you can make it live.

To make your survey live:

1. Open the *tasks* window.
2. Right-click the survey task and select **properties**.
3. Click the **webprod** tab.
4. Right-click the appropriate connection, and select **set online**.

Note that you will also need to send invitations, so that respondents actually know about the survey. This is covered below.

Taking your survey offline is just as easy. When this happens, no new interviews will be allowed to start, but any ones in-progress will be allowed to complete.

To take your survey offline:

1. Open the **tasks** window.
2. Right-click the survey task and select **properties**.
3. Click the **webprod** tab.

4. Right-click the appropriate connection, and select **set offline**.

Activating sample lists by schedule

You don't have to start or stop the sample list manually: you can schedule when it is active.

To schedule a sample list:

1. Open the **lists** window.
2. Right-click the sample list, and select **properties**.
3. Click the **scheduling** tab.
4. Click **add…**. The *schedule properties* dialog appears.
5. Select **telephony**.
6. Click the **schedule** tab.
7. Select the details for the scheduling, as appropriate (e.g. the interval, when it run etc.). Then click **OK**.
8. To disable a schedule, right-click it and select **disable**. To re-enable a disabled schedule, select **enable**.
9. Click **OK** to apply your changes.

Invitations and reminders

If the survey is restricted to invited participants, Askia can take care of issuing personalised invitations and reminders to your sample list.

These are emailed out to all participants as HTML messages, which allows you to apply formatting to improve the presentation of the message. If the recipient can only read plain text email messages, they will see your invitation or reminder in plain text format, without any bold text, colour or font attributes you have applied – because Askia automatically includes a plain text version, which email readers not enabled for HTML will read instead.

When testing email messages, check that they are still legible and the meaning is clear when viewed in plain text format, as well as HTML format.

Personalisation

When writing invitation or reminder emails, you will probably want to include information to personalise the message content. For example, you might want to include the invitee's name, or the name of a product or service they have used.

It is possible to include information from the questionnaire, or from the sample.

Survey links

The email invitation must contain a survey link, to allow the participant to click on the link to access the survey. It normally only makes sense to issue personalised links.

Using the special field **[ccaDoPanelLink]** in you invitation. For example:

```
To take part in the survey, please click here:
[ccaDoPanelLink].
```

The system will put the correct link, including the individual respondent ID when the survey is associated with a sample list, into the email.

There is nothing to prevent you from including this link more than once in the invitation, e.g. for emphasis.

For more information about survey links, invitations and reminders, please refer to the Assistant, and also these Knowledge Base articles in the askia**web** section:

- *Links and Personalised Invitations When Working With Your Own Sample.*
- *Working with External Panel Providers*
- *Possible AskiaExt Links*

Sending out the invitations

Note that you cannot send out invitations if you have already reached your sample quotas.

To issue email invitations:

1. Open the *sample lists* window (in the ribbon's **view** tab, select **contact lists**).
2. Right-click the appropriate sample list and select **mailing**, then **start invitation mailing…**
3. Enter the number of emails you want to send. To send invitations to the entire list, enter *0*.
4. Click **OK**. Your invitation emails are sent out.

Sending reminders manually

Askiafield allows you to send reminder emails. You can specify who to remind, based on how many days have elapsed since they were last invited or reminded. The system automatically knows which people in the sample list have already taken part in the survey, and does not remind these individuals.

To issue email reminders:

1. Open the *sample lists* window (in the ribbon's **view** tab, select **contact lists**).
2. Right-click the sample list and select **mailing**, then **start sending reminders…** The *send reminders* dialog appears**.**
3. Enter the amount of time since their last email that should have elapsed before individuals are reminded (for example, if you enter 1 day, then only people who have not had either an invitation or reminder email in the last day will be reminded).

4. Click **OK**. If you have not already selected a mailing template for the invitations, you will be asked to define one, just as you would for invitation emails. The reminders are then sent out.

Setting up reminders with a task schedule

As well as manually sending reminders, it is also possible to schedule reminder emails. You can set them up to be released in batches.

To set up a reminder schedule:

1. Open the *sample lists* window.
2. Right-click the appropriate sample list, and select **properties**.
3. Click the **scheduling** tab.
4. Click **add…**. The *schedule properties* dialog appears.
5. In the **task** tab, click **send reminder email**.
6. Enter the maximum number of reminder emails you want to be sent to any individual.
7. In **time passed since previous email**, select the interval (in days, hours and minutes) you want to elapse since an individual last received either an invitation or previous reminder email, before a reminder will be sent.
8. Click the **schedule** tab. In **schedule task**, select the basis on which the reminders will be sent (**once, daily, weekly, monthly**). For example, to send batches of reminder emails every day, you would select **daily**.
9. In **start**, select the beginning of the time-frame during which reminders can be sent out. You can also, optionally, set an ending date for the time-frame.
10. If you selected a time interval (daily, weekly or monthly), specify when that will occur (e.g. what day of the week, the start/end times, etc.).
11. Click **OK**.
12. You can set up additional schedules if you wish. Repeat steps 4-11 for each further release you want to schedule.
13. Click **OK** to close the sample list properties and apply your changes.

If you no longer require your task schedule to run, it can be deactivated or deleted. See Deactivating a schedule on page 45.

Links when working with external panels

When working with an external panel provider, you will normally not need to issue invitations, as the panel provider will do this for you. Instead, you will need to send them a survey start link, and tell them how to insert the unique reference for each panel.

There is a special form of the survey link to use, when working with a panel provider.

Recap

In this session on live operations, we have looked at:

- How links are constructed
- How to test a survey
- How to make a survey live
- How to activate sample
- Creating invitations and reminders
- Issuing invitations and scheduling reminders

Practical exercises

Your tutor will ask you to do one or both of the following exercises.

1. Testing and launching projects

If your tutor has asked you to test and launch a web survey, please follow these steps:

Please follow these steps:

1. Open the *tasks* window.
2. Right-click the survey task and select **properties**.
3. Click the **webprod** tab.
4. Right-click the appropriate WebProd, and select **Set Online**.
5. Select **web survey**. The appropriate options become available for the sample lists associated with the project.
6. In the *tasks* window, right-click the survey task and select **test web survey**. To make the survey live, you will also need to send out invitations; this is covered in the exercise below.

2. Sending invitations and reminders

Please follow these steps:

1. Create a suitable email invitation template using the file *named-invitation.htm* as a starting point; your tutor will tell you where this file is located.
2. Save your invitation file as a plain text file under a different name and make sure it has the extension .htm.
3. Create a reminder template, using the file *named-reminder.htm* as the basis.
4. In askiafield supervisor, open the *sample lists* window (in the ribbon's **view** tab, select **contact lists**).
5. Right-click your sample list, and select **properties**.
6. Open the **mail templates** tab.
7. Next to **template file**, click **…** and click **select local file to upload...**. Select the invitation template you created just now.
8. In **subject**, edit the email's subject line.
9. Click **edit** to change the email text, and include the survey start link as **[ccaDoPanelLink]**. Make sure you save your changes to the email text.
10. At the top of the tab, next to the tab for *invitation email*, click **Reminder Mail 1**.

11. Repeat steps 6-8, but this time for the reminder email, using your reminder template.
12. Click **OK** to confirm your changes.
13. In the *sample lists* window, right-click your sample list and select **mailing**, then **start invitation mailing…**
14. Enter the number of emails you want to send. In this case, enter 0 (zero), which sends invitations to everyone in the list. Then, click **OK**.
15. Click **OK** to finish defining your invitation email and send out your invitation emails.
16. If possible, open your email, and look at the invitation email.
17. Now, we will schedule the reminder emails. In the *sample lists* window, right-click your sample list, and select **properties**.
18. Click the **scheduling** tab.
19. Click **add**.
20. Click **send reminder email**.
21. In **time passed since previous email**, specify 1 day.
22. Click the **schedule** tab. Select **daily**.
23. In **range**, set a date range starting tomorrow and ending three days after that.
24. Click **OK**.

Session 305 CATI and CAPI operations *(CATI AND CAPI ONLY)*

Outline

Topics

In this session, we will introduce:

- Testing
- Going live with a project
- Activating sample lists

Learning outcomes

After this session, you will be able to:

- Test a survey
- Make surveys live
- Activate sample

Material covered

Testing and going live

The method you should use to test your survey depends on the interviewing mode:

- For CATI projects, there is a dedicated **brief mode**. When conducting the interview in this mode, the toolbar shows the warning "brief".
- For CAPI projects, you need to set up a special question, and routing instruction, to ensure that test interviews are not saved

Testing a CATI survey *CATI ONLY*

You can set **brief mode**, either for a CATI survey, or for a CATI group. When brief mode is set, no data will be recorded for that survey or group.

Setting brief mode on a group allows the entire group to preview the survey without saving any data. We recommend that you set up separate groups for testing and live work; this allows you to easily determine when a survey is being tested, and when live interviewing is taking place.

To set brief mode on a group:

1. Open the *group hierarchy* window
2. Right-click the group and select **properties**.
3. Click the **dialing** tab.
4. Ensure **override defaults** is selected.
5. Select **brief mode**.
6. You then need to start telephony on the survey, so that testing can begin. See Activating sample lists by schedule on page *35* for details.

Going live with a CATI survey *CATI ONLY*

Warning: before starting telephony, confirm that real agents have not been assigned; we do not want to dial real telephone numbers during the course!

When going live with a CATI project, you first need to ensure that one or more sample lists is associated with the survey task. You also need at least one outbound group assigned to the task. Both of these were covered described *in* Session 303 under Defining Groups in CATI *CATI ONLY* on page 25. You can then initiate fieldwork. Telephony will start automatically, drawing sample from the activated list/s

To begin fieldwork:

1. Open the *sample lists* window.
2. Right-click the appropriate sample list, and select **telephony**, then **start**. Calls will start to be assigned to agents.
3. Repeat step 2 for any other sample lists you want to use at this point.

Stopping fieldwork

Stopping fieldwork is just as straight-forward as starting it.

To end fieldwork:

1. Open the *sample lists* window.
2. Right-click the sample lists you want to stop, and select **telephony**, then **stop**. Askiafield will stop assigning calls on this list (any calls already in progress will be allowed to conclude normally).
3. Repeat step 2 for each sample list you want to stop.

Testing a CAPI survey *CAPI ONLY*

To test your CAPI survey, you need to create a special test version of the questionnaire in askiadesign, as follows:

- at the start of the questionnaire, add a question that allows you to select “test interview” or “real interview”;
- at the end of the questionnaire, add a “go without saving” routing instruction so that, when “test interview” is selected, the data is not saved. Please see the askiadesign Getting Started Guide and askiadesign Assistant for more information on creating routing instructions;
- when you want to go live, use askiadesign to hide the initial question.

To test your CAPI survey, you first have to transfer the QES file to a device. When you connect the device to the askiafield CCA (this may happen automatically, if your device is configured to do so) by clicking connect on the main screen of askiaface or askiaface**force**, the QES will be transferred. Setting up devices and transferring files is covered in more detail below.

Going live with a CAPI survey *CAPI ONLY*

Now your project is set up, you can make it live at any time. You need to carry out five tasks:

- Ensure that you have hidden any “test interview” question you have set up for the purposes of testing.
- Ensure the devices are configured so that they can connect to the askiafield CCA;

- Set up a CAPI agent group for the project, ideally with the project name in the group name;
- Associate the survey task with this group;
- Connect the devices to the askiafield CCA machine (this transfers the project files automatically).

Note that any quotas you defined on the project are automatically divided between the agents in the CAPI group. However, you can override this and allocate them yourself. Please refer to the section "Setting up CAPI Fieldwork" in the Field assistant for more information on defining quotas.

Configuring devices

If your interviewing devices are not set up to connect to the askiafield CCA, you need to do so before you can begin fieldwork. The procedure varies according to the operating system you run on your devices (Windows, iOS or Android). For further information, please see the *Askiaface Installation Guide* that can be found in the Askia website on the askiaface product page.

Transferring the project files

The project files are transferred automatically whenever an agent connects to the askiafield CCA. The connection happens automatically (if configured to do so), or when the agent clicks connect on the main screen in askia**face** or askia**faceforCE**. The following files are transferred:

- Respondent data is copied to the askiafield **CCA**. This is then integrated into the QES file;
- the latest version of the questionnaire is copied to the device;
- the latest quota details are sent to the device.

Activating sample lists

It is possible to automate the release of sample, by setting up a schedule to automatically start or stop the list.

To set up a schedule:

1. Open the *sample lists* window.
2. Right-click the appropriate sample list, and select **properties**.
3. Click the **scheduling** tab.
4. Click **add…**. The *schedule properties* dialog appears.
5. In the **task** tab, click **telephony**.
6. Click the **schedule** tab. In **schedule task**, select the basis on which the sample release will run (**once, daily, weekly, monthly**).
7. If you selected *once*, specify the start and end date/times for the sample release.

8. If you selected a time interval (daily, weekly or monthly), specify when that will occur (e.g. what day of the week, the start/end times, etc.).
9. Click **OK**.
10. You can set up additional release schedules if you wish. Repeat steps 4-9 for each further release you want to schedule.
11. Click **OK** to close the sample list properties and apply your changes.

Deactivating a schedule

Task schedules are active by default. However, if you do not want a schedule to run, you can deactivate or delete it.

To deactivate a schedule:

1. Open the *sample lists* window.
2. Right-click the appropriate sample list, and select **properties**.
3. Click the **scheduling** tab.
4. Right-click the schedule and select **disable** (to keep it, but stop it from running) or **delete** (to permanently remove it).
5. Click **OK**.

If you have disabled a schedule, you can re-enable it by right-clicking and selecting **enable**.

Recap

In this session on live operations, we have looked at:

- How to test a survey
- How to make a survey live
- *CATI AND WEB* How to activate sample
- Different quota models: simple, nested and [CATI and WEB ONLY] from the sample list
- How to set quota priorities
- *WEB ONLY* Issuing invitations and scheduling reminders

Practical exercises

1. Testing and launching CATI projects *CATI ONLY*

*If your tutor has asked you to test and launch a **CATI** survey, please follow these steps.*

Note: When you set up your testing group earlier in the course, you assigned it to the survey task (this is shown next to the group's name in the *group hierarchy* window). This means that when you start interviewing, the testing group will be used, and therefore no data will be saved. This is ideal for testing your survey before starting live interviewing.

1. **Your tutor will tell you whether to start telephony at this point. Do not do so unless he/she asks you to!**

   Locate your sample list, right-click it, and note that there is the option *telephony* and *start*. **Do not select this now unless your tutor asks you to do so**; if you have an automatic dialer, and real agents are assigned to the task, calls would start to be given to agents in brief mode!
2. Testing is now started on your task. Now let's stop the testing, and start real interviewing, by assigning a live interviewing group to the task.
3. Right-the sample list, select **telephony**, and **stop**. This stops calls happening in the testing group.
4. Open the *group hierarchy* view (in the ribbon's **view** tab, select **groups** if this window is not visible).
5. Right-click anywhere in the *group hierarchy* window and select **new outbound group**.
6. In **name**, type a name for the interviewing group.
7. Next to **task**, click **…**. Then, select your survey task, and click **OK**.
8. Open the **dialing** tab and ensure **brief mode** is **not** selected.
9. Click **OK** to create your group. Now, let's start the interviewing for this group.
10. Locate your sample list, right-click it, and note that there is the option *telephony* and *start*. **Do not select this now unless your tutor asks you to do so**; if you have an automatic dialer, and real agents are assigned to the task, calls would start to be given to agents in brief mode!

NB. We can set brief mode on the survey itself (which means that all activity on the survey will be in brief mode), but it is better practice to do so by using an appropriate interviewing group, as we did in the exercise.

2. Testing and launching CAPI projects *CAPI ONLY*

*If your tutor has asked you to test and launch a **CAPI** survey, please follow these steps:*

1. Open the QES or QEX file in askiadesign.
2. Add a single-coded question that allows you to select “test interview” or “real interview.”
3. At the end of the questionnaire, add a a “go without saving” routing instruction. Set it up so that, when “test interview” is selected, the data is not saved.
4. In askia**supervisor**, set up a CAPI group for the project, with the project name in the group name.
5. In the **task** field of the group properties, select your survey.
6. Assign one or more agents to the group.
7. Connect an interviewing device to the askiafield CCA, and the interviewing files will transfer.
8. On the interviewing device, sign in as one of the CAPI agents, and conduct a test interview.
9. Open the QES or QEX file in askiadesign.
10. Hide the “test interview” question that you set up earlier.
11. Connect an interviewing device to the askiafield CCA, and the interviewing files will transfer.
12. On the interviewing device, conduct a “real” interview.

Session 306 Quotas

Outline

Topics

In this session, we will present:

- Defining quotas
- *CATI AND WEB ONLY* Quota from sample list
- Quota priorities
- Quota behaviour

Learning outcomes

After this session, you will be able to:

- Identify and set-up different types of quota
- Enter or change quota targets
- Create multi-level or nested quotas
- Vary the relative importance of some quota targets

Material covered

Quota sources

Quotas can be drawn from a question in the **questionnaire**, or fields in the **sample list**. Questions used as quotas should be placed as close to the start of the interview as possible, to avoid wasting time on interviews that will not be required.

Normally quotas are checked only after contact has been made with the participant. If the sample file contains a variable used for the quota, the quota check does not need to wait until the interview starts, and Askia will do it in the background. It will automatically close off all the sample records where they are over quota, as soon as the relevant quota cell has been filled.

Quota models

There are two quota models available in askiafield:

- **Simple** quota targets;
- **Nested** quotas with different levels.

A quota can use either model, no matter its source (i.e. whether it comes from the questionnaire or a sample list). When using quotas from the questionnaire, note that only variables that have the option "available for quota" set in askia**design** can be used.

Simple quota targets

Askiafield makes it easy to define simple quotas.

To add a simple quota to your survey:

1. Open the *tasks* window.
2. Right-click the survey task, and select **define quota**. The *quotas* dialog appears.
3. Click the following icon:

4. Select the question you want to use as the basis of the quota. Note that you can only select questions which have the option **available for quota** enabled.
5. In **target sample size**, enter the overall number of interviews you want to conduct.
6. For each quota, enter the **target count** or **target percentage** as appropriate. Note that you can copy and paste values from Excel directly into the target column. You can choose to enter the values as percentages, rather than absolute values, by selecting the option **use percentage**.

7. For each quota, select the appropriate priority. If you set a higher priority you for a quota, askiafield will select the more addresses that meet the quota definition.
8. For each quota, leave the **behavior** set to *automatic*.
9. When you have entered the details for each quota target, click **OK**.

Nested quotas with different levels

To add a crossed quota to your survey:

1. Open the *tasks* window.
2. Right-click the survey task, and select **define quota**. The *quotas* dialog appears.
3. Click the following icon:

4. Select the first question you want to use as the basis of the quota. Note that you can only select questions which have the option **available for quota** enabled.
5. In **target sample size**, enter the overall number of interviews you want to conduct.
6. For each quota, enter the **target count** or **target percentage** as appropriate. Note that you can copy and paste values from Excel directly into the target column. You can choose to enter the values as percentages, rather than absolute values, by selecting the option **use percentage**.
7. For each quota, select the appropriate priority. If you set a higher priority you for a quota, askiafield will select the more addresses that meet the quota definition.
8. For each quota, leave the **behavior** set to *automatic*.
9. Select a sub-item in the quota, and click the following icon:

10. Select the question you want to cross with the selected sub-item. You are asked **do you want to create a target for each sub-population item**? If you answer yes, then the question will be added to each sub-item in the original question.
11. Set the target counts and other settings for each target, as described in steps 5-8 above.
12. When you have entered the details for each quota target, click **OK**.

Quota from sample list *CATI AND WEB ONLY*

Defining quotas from the sample list is the same procedure as defining from the questionnaire. With sample list quotas, however, you can influence the usage of the sample from the monitor window, changing priorities for individual quotas, or even blocking individual items, so that contacts within this quota will no longer be called.

To block a quota item, or change the priority:

1. In the *tasks* window, right-click the survey task, and select **monitor**. The quota monitor window opens.
2. Right-click a quota item, select change priority, and select a new priority level (or blocked or ignored). See below for more details on quota priorities.

Setting quota priority and behaviour

For each quota category, you can set the **priority** and **behaviour**:

- the **priority** controls the speed at which sample is used for the category;
- the **behaviour** determines how strictly the quota is enforced.

Quota behaviour

- ; this is covered in the knowledge base article XXYXQuota **behaviour** determines whether interviews are stopped when the quota is full. The following options are available for all quotas:

- **Automatic** means a blocking/strict quota; if the quota is full, the interview cannot go ahead. A message is displayed to the agent or respondent and they cannot continue with the interview.
- **Manual** means a relaxed (permissive, or non-blocking) quota. If the quota is full, the interview can still go ahead; no warning is given at all. The questionnaire can also contain additional script commands to influence the way that quotas are dealt with in the interview. If this is the case, you need to use Manual quota behaviour, to allow the script to control the outcome.
- **Semi-automatic** is a relaxed (permissive) quota, in that the interview can still go ahead, but a "non-blocking message" (stating that the quota is full) is displayed. In CATI, the agent can continue or not at his or her own choice. This has no effect for Web and means the same as manual.

Quota priority

The priority allows you to control the speed for which sample is used for this category.

There are various priority options available. The first three are available only for sample list-based quotas:

High	addresses that meet this quota will be used more often.
Normal	addresses that meet this quota will be used at the normal rate.
Low	addresses that meet this quota will be used less often.

Askia will use advanced predictive algorithms to balance the rate at which sample is presented, when set to **high**, **normal** or **low**

Recap

In this session on live operations, we have looked at:

- The different quota models
- Quota behaviour and setting quota priorities
- *CATI AND WEB:* Quota from the sample list

Practical exercise

Setting quotas

For this exercise, your tutor will specify two questions to use as a crossed (nested) quota.

Please follow these steps:

1. Open the *tasks* window.
2. Right-click your survey task, and select **define quota**.
3. In the *quotas* dialog, click the following icon:  (prior to V5.3.3.)  (V5.3.3 onwards)
4. Select the first question specified by your tutor. Note that you can only select questions which have the option **available for quota** enabled.
5. In **target sample size**, enter the overall number of interviews you want to conduct.
6. Select **use percentage**.
7. For each quota, enter the appropriate **target percentage** and select the appropriate priority. Leave the **behavior** set to *automatic*.
8. Select any sub-item in the quota, and click the following icon:  (prior to V5.3.3)  (V5.3.3 onwards)
9. Select the second question specified by your tutor. You are asked **do you want to create a target for each sub-population item**? Answer **yes**; the question is added to each sub-item in the original question.
10. Set the target counts and other settings for each target, as described in steps 6-7 above.
11. When you have entered the details for each quota target, click **OK**.

Session 307 Call-back and dialling methods *(CATI ONLY)*

Outline

Topics

In this session, we will present:

- Call results
- Call-back settings
  - *DIALLER ONLY* Predictive and Progressive dialling modes
  - *DIALLER ONLY* Recording interviews with a dialler

Learning outcomes

After this session, you will be able to:

- Monitor the use of sample by observing the result codes
- Customise your view of the result codes grid
- Adjust call-back time intervals and shift times
- *DIALLER ONLY* Apply any of the dial modes supported by the dialler
- *DIALLER ONLY* Set interviews to be recorded by the dialler

Material covered

Call result codes

Askiafield provides a pre-defined list of call result codes, but you can customise this for your survey task. You can add, remove and rename codes as required. You can also save your code list, and load it when setting up a future survey, so you do not have to continually re-define custom codes for each survey.

Customising the code list

To rename an existing code:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **call result codes** tab.
4. Click the name of the code you wish to change, and type the new name.
5. When you have finished making changes to the code list, click **OK** to apply your changes.

The list of codes is standard. You can't delete a code but you can remove it from view by hiding it.

To hide a code:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **call result codes** tab.
4. Next to the code, ensure **show on CATI** is *not* selected.
5. When you have finished making changes to the code list, click **OK** to apply your changes.

Defining your own Sub-codes

You can define a new code as a sub-code of an existing one.

To add a new sub-result code:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **call result codes** tab.
4. Select the code you wish to be the "parent" code of the new sub-result code. To do so, click on it anywhere except on the name.

5. Next to the code list, click **ins**.
6. When you have finished making changes to the code list, click **OK** to apply your changes.

You can completely remove an existing sub-code, although we do not recommend this once fieldwork has started.

To remove an existing sub-code:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **call result codes** tab.
4. Select the code you wish to remove, by clicking on it anywhere except on the name.

5. Next to the code list, click **delete**.
6. When you have finished making changes to the code list, click **OK** to apply your changes.

You can make a sub-code invisible during CATI interviewing. It will not be selectable by CATI agents as an outcome code.

To hide a code:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **call result codes** tab.
4. Next to the code, ensure **show on CATI** is *not* selected.
5. When you have finished making changes to the code list, click **OK** to apply your changes.

Loading and saving code lists

You can load a code list, and save your own code lists for future use. This allows you to quickly set up your codes without having to define them all for each survey.

To load a code list:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **call result codes** tab.
4. In **predefined**, select the appropriate code list.
5. Click **OK** to apply your changes.

When you have set up a code list to your liking, you can save it for future use. You can then load it on future surveys, saving you the task of defining the list each time.

To save a code list for future use:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **call result codes** tab.

4. Next to **predefined**, click **new**.
5. Edit the code list, and ensure it is to your liking.

6. Next to **predefined**, click **save**.

Callback settings

Setting a time interval between two call attempts

Askiafield allows you to control the maximum number of call-backs that are allowed for each outcome code, and their frequency. You can define the number of times that askiafield will try to call a number if it receives a particular call result (busy, answering machine, etc.), and the time interval that must elapse between these call attempts. Callback settings can be defined for a task, or for individual sample lists (in which case, the sample list settings over-ride those for the task).

To set the callback rules on a task:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **callback** tab.
4. For each code, in **attempts**, set the maximum number of calls that may be made, including the original call (e.g. if you set "wrong address" to 1, then there will never be a call-back to a number where this call outcome occurs; if you set appointment to 5, there will be a maximum of 4 attempted call-backs for number where this code occurs).
5. For each code, you can set the time delay between two call attempts. In **next attempt**, select *after*, *after running* or *next shift* (see below), and then, except for *next shift*, the time delay in days, hours and minutes.

The possible settings for **next attempt** are as follows:

After	The delay you specify will be counted in real time, even if the list is not running (e.g. no interviewing shift is inactive). This means that the next call might end up scheduled when there is no interviewing shift to handle it.
After running	The delay you specify will be counted only when the sample list is running. This means that the next call will always be scheduled when there is an interviewing shift to handle it.
Next shift	The callback will be carried out during the next interviewing shift, at the same relative position in the shift (so if the initial call is halfway through the shift, then the callback will be halfway through the next shift). Note that shifts have to be defined on the survey task or sample list for this option to work. Please see the *askiafield Assistant* for details.

Note that more sophisticated callback rules can be defined by using VBScript. Please refer to the Askiafield Assistant for details.

Dialling methods *DIALLER ONLY*

If your call centre has specialist telephony equipment, you can take advantage of askiafield's predictive dialling features. These will make more efficient use of your call centre resources.

The available dialling methods are as follows:

Manual dialing	No predictive dialing occurs; agents need to enter telephone numbers manually on their telephone.
Manual dialing with preview	Agents need to manually dial, but they can select an address from a list of several telephone numbers.
¶ **Progressive dialing**	Askiafield will automatically dial telephone numbers; the questionnaire is only displayed if someone answers.
¶ **Progressive dialing with preview**	Agents can choose from a list of numbers. Askiafield will automatically dial selected telephone numbers; the questionnaire is only displayed if someone answers.
¶ **Predictive**	Askiafield dials numbers automatically, at a set interval before the previous interview finishes. This reduces agent waiting time between interviews. The next questionnaire only appears on the agent's screen if someone answers.

¶ **Note: Specialist telephony equipment is required for these 3 options.**

Dialling methods can applied at a task or a group level. If applied to a task it will affects all call activity initiated from that task. At a group level, it can be defined on any *outbound* group. If set on a group, this overrides any dialling method chosen for a task that the group is assigned to.

To set the dialling method on a task:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **dialing** tab.
4. In **dialing method**, select the appropriate option (see above).
5. Click **OK**.

To set the dialling method on an outbound group:

1. Open the *group hierarchy* window (in the ribbon's **view** tab, select **groups**).
2. Right-click the group and click **properties**.
3. Click the **dialing** tab.
4. Select **override defaults**.
5. In **dialing method**, select the appropriate option (see above).

6. Click **OK**.

Creating an agent's 'hang-up' outcome code

If you are using an automatic dialling system, you can have askiafield automatically end the call when a specific call outcome code is selected by the agent.

To set askiafield to hang up when a specific code is selected:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **properties**.
3. Click the **call result codes** tab.
4. Next to the code, ensure **drop call** is selected.
5. When you have finished making changes to the code list, click **OK** to apply your changes.

Recap

In this session on call-back and dialling methods for CATI, we have explored:

- Call result codes
- Call-back rules and settings
- Shift times and how they influence call-back times
- Customising your view of the result code grid
- Adjusting call-back settings
- Loading or applying call-back settings to the sample list
  - *DIALLER ONLY* Dialling modes: predictive, progressive and preview
  - *DIALLER ONLY* Recording interviews using the dialler

Practical exercises

1. Defining call result codes

Follow these steps:

1. Open the properties for your survey task.
2. Click the **call result codes** tab.
3.  Next to **predefined**, click **new**.
4.  Add a new code beneath **refused**; click anywhere on this code except the name, and click **ins**.
5. Type the name **refusal at introduction** for the new code.
6. Repeat steps 4 and 5 to add another code, **refusal during interview**, as a sub-code below **refused**.
6. Next to predefined, type a name for your code list (e.g. *standard code list*).
7.  Next to **predefined**, click **save**. This saves your code list for future use.
8. Click **OK** to apply your changes.

2. Call-back settings

Follow these steps:

1. Open the properties for your survey task.
2. Click the **callback** tab.
3. Set up the callback attempts as follows:

Code	Attempts	Next attempt
No tone	1	-
Busy	3	After 10 minutes.
No answer	3	After 2 hours.
Hang up	2	After 5 minutes.
Answering machine	3	After running 10 minutes.
Person absent	3	Next shift.
Refused	1	-

3. Setting dialling methods *DIALLER ONLY*

For this exercise, your tutor will tell you which dialling method to use.

Follow these steps:

1. Open the properties for your survey task.
2. Click the **dialing** tab.
3. In **dialing method**, select the dialling method named by your tutor.
4. Click **OK**.

Session 308 Monitoring fieldwork activities

Outline

Topics

In this session, we will cover:

- *CAPI AND CATI* The interviewer's perspective
- Monitoring survey progress
- Interview outcomes
- Fieldwork reports available
- *CATI ONLY* Monitoring agents

Learning outcomes

After this session, you will be able to:

- Understand the interviewer and/or respondents perspective during an interview
- Keep track of fieldwork progress on your survey
- Take appropriate actions to ensure fieldwork is delivered as required

Material covered

Monitoring survey progress in CAPI *CAPI ONLY*

Fieldwork reports

To get a quick view of progress on your survey, simply view the survey in the *tasks* window. The number of completed interviews is shown, along with the target. For more detail, you can view the task's monitor window, by following the procedure below.

To view interviewing progress on a task:

1. Open the *tasks* window, if it is not already visible (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and select **monitor**.
3. The **statistics on numbers** tab shows call outcome details. It displays how many numbers fall into each call outcome category.

Monitoring survey progress in CATI *CATI ONLY*

Call outcomes

To get a quick view of progress on your survey, simply view the survey in the *tasks* window. The number of completed interviews is shown, along with the target. For more detail, you can also view the progress being made for a specific sample list, including the number of calls in each call outcome category, by following the procedure below.

To view sample list progress by call outcome:

1. Open the *sample lists* window (in the ribbon's **view** tab, select **contact lists**).
2. Right-click a sample list and select **monitor**.

3. The **statistics on numbers** tab shows call outcome details for the addresses in the sample list. It displays how many numbers fall into each call outcome category. The **statistics on calls** tab shows the same information, broken down by individual calls.
3. To view a snapshot of the current progress for the sample list, click **statistics on last call**.

You can also view a more detailed breakdown of questions in your survey by quota, including the target and completion rates.

To view call details for each quota:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **monitor**. The *monitor* window appears, showing details for each quota, including the number of interviews achieved, and the number still to be done.

Interviewer reports

Askiafield can produce reports on specific agents, allowing you to determine the number of calls they have made, and totals and averages for speaking time, on hold time, etc.

To view an interviewer report:

1. Open the *agents* window (in the ribbon's **view** tab, click **agents**).
2. Right-click the agent and select **reports**, then **agent outbound call performance**.

3. Enter the range of dates that you want the report to cover, and click **OK**. The report is produced, and appears in a separate window.

You can also view reports on the amount of pause time spent by the agent (select **agent pause details**) and the amount of time the agent has been available for calls (**agent availability**).

Monitoring agents

Askiafield allows you to monitor agent activity live. In the agents window, you can see the details of each agent (their activity status, and basic performance statistics). In addition, you can "see in" to view the agent's screen, or listen in to their calls (if you have integrated telephony).

To view the agent's screen:

1. Open the *agents* window (in the ribbon's **view** tab, click **agents**).
2. Right-click the agent and select **see in**.

To listen in to the agent's current call:

1. Open the *agents* window (in the ribbon's **view** tab, click **agents**).

2. Right-click the agent and select **listen in**.

Fieldwork reports

In addition to the web statistics report described above, askiafield allows you to produce more detailed reports. In particular, you will probably find the following reports useful:

Report name	Interviewing mode	Report details
Agent interviewer report	CATI	Shows logged-in and call times for each agent, and the number of interviews (complete and abandoned for them)
Agent pauses overview	CATI	Shows number of pauses and pause times for each agent
Task results (including predictive)	CATI with dialler	Shows total, total %, time and time% per survey
Telephony calls	CATI	Details of calls made
Email states	Web	Details of invitations and reminders that have been mailed out.

To produce a Crystal Report for a task:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click the task and select **reports**, then select the appropriate report.
3. If you are asked to specify the dates, enter the range you want the report to cover.
4. Click **OK**. The report is produced, and appears in a separate window.

Integration with SAP® Crystal Reports

Integration with Crystal Reports provides an advanced capability to Askia field users to create their own custom fieldwork reports based on any data available in the CCA database. This means you are not limited to those reports already provided, and you can create your own custom reports on any information held in the CCA database.

This advanced capability requires knowledge of how to program reports in Crystal Reports and is not covered in this course. Speak to your Askia representative for more information, or to commission custom reports from Askia (a charge may be made for these).

Monitoring survey progress for Web *WEB ONLY*

Interview outcomes

tasks window. The number of completed interviews is shown, along with the target.

You can produce a *web statistics* report showing the progress that has been made on the web survey. It shows:

- the total number of interviews that have started;
- the number of completed interviews;
- the number of interviews that ended with a quota full result;
- the number of abandoned interviews;
- the number of interview attempts where the survey was offline, and
- the number of interviews that finished without saving.

To view the web statistics report:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click the task and select **reports**, then **web statistics**.
3. Enter the range of dates that you want the report to cover, and click **OK**. The report is produced, and appears in a separate window.

Tracking invitations and reminders

You can also keep track of how many invitations and reminders have been issued, and whether the recipients have taken part in the interview, by viewing the *statistics on mails*.

To view the statistics on mails:

1. Open the *lists* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click the list and select **monitor**.
3. Click the **statistics on mails** tab.

Sample list reports

As with the fieldwork reports provided in Crystal Reports, you can also produce a Crystal Reports report for survey tasks. This provides details for the task, including, where relevant, details for all lists associated with the task.

You can view many reports for individual sample lists. This provides details for the selected list only.

As with the fieldwork reports provided in Crystal Reports, you can also use a Crystal Reports to list out each sample you have loaded into a project. This provides details for each sample record and its current status or outcome.

To produce a Crystal Report for an individual sample list:

1. Open the *sample lists* window (in the ribbon's **view** tab, select **contact lists**).
2. Right-click the task and select **reports**, then select the appropriate report.
3. If you are asked to specify the dates, enter the range you want the report to cover.
4. Click **OK**. The report is produced, and appears in a separate window.

Recap

In this session on monitoring fieldwork activities, we have:

- Looked at interviews as they appear from the interviewer's perspective for CAPI and CATI.
- Looked at web interviews as they appear to invited respondents.
- Observed the effect of different call outcomes on interview statistics
- Examined the different kinds of reports available to monitor fieldwork
- [CATI only:] Covered how to monitor interviews in progress, both following the screens and (if available) listening in to the audio.

Exercises

1. The interviewer's view

Follow these steps:

1. If you tutor covered CATI, create a CATI agent (with your own name as part of the agent's name), then:

   1.1 Complete an interview (to the end)

   1.2 Start an interview but allow it to be screened out

   1.3 Start but terminate some interviews for different reasons, including one refusal and one appointment.

2. If you tutor covered Web interviewing, obtain the start survey link, and complete at least one interview; start your last interview but abandon it before you reach the end.

2. Monitoring survey progress in CAPI *CAPI ONLY*

Follow these steps:

1. Open the *tasks* window, if it is not already visible (in the ribbon's **view** tab, select **tasks**).
2. In the *tasks* window, check the details shown for the task (the number of completed interviews and target).
3. Right-click your survey task and select **monitor**.
4. Open the **statistics on numbers** tab, and examine the call outcome details. Note how many numbers fall into each call outcome category.

3. Monitoring survey progress in CATI *CATI ONLY*

Follow these steps:

1. Open the *tasks* window, if it is not already visible (in the ribbon's **view** tab, select **tasks**).
2. In the *tasks* window, check the details shown for the task (the number of completed interviews and target).
3. Open the *sample lists* window, if it is not already visible (in the ribbon's **view** tab, select **contact lists**).
4. Right-click your sample list and select **monitor**.
5. Open the **statistics on numbers** tab, and examine the call outcome details. Note how many numbers fall into each call outcome category.

6. In the sample lists window, right-click the sample list and click **statistics on last call**. This shows a snapshot of the progress on your sample list.
7. Now, let's view the call details by quota. In the *tasks* window, right-click your task and select **monitor**. The *monitor* window appears. Check the details for each quota (the number of interviews achieved, the number still to be done, etc.).

4. Viewing agent reports *CATI ONLY*

Follow these steps:

1. Open the *agents* window (in the ribbon's **view** tab, select **agents**).
2. Right-click an agent and select **reports**, then **agent outbound call performance**.
3. Enter the range of dates that you want the report to cover, for example, the last month, and click **OK**. The report appears in a separate window.

5. Other Fieldwork reports *CATI ONLY*

Follow these steps:

1. Open the *tasks* window, if it is not already visible (in the ribbon's **view** tab, select **tasks**).
2. Right-click the task and select **reports**, then select *Telephony calls*.
3. Enter the date range you want the report to cover.
4. Click **OK**. The report is produced, and appears in a separate window.
5. Repeat steps 2-4, but for another report, e.g. the *agent pauses overview*.

Note: you can also produce reports for individual sample lists. The procedure is the same, except you right-click the list instead of a survey task. The reports shows details only for the sample list, rather than all lists associated with a task.

6. Monitoring survey progress for Web *WEB ONLY*

Follow these steps:

1. Open the *tasks* window, if it is not already visible (in the ribbon's **view** tab, select **tasks**).
2. In the *tasks* window, check the details shown for the task (the number of completed interviews and target).
3. Right-click your task and select **reports**, then **web statistics**. Take a look at the report screen.
4. Enter the range of dates that you want the report to cover, and click **OK**. The report is produced, and appears in a separate window.

5. Now let's look at the status of invitations and reminders for a sample list. First of all, open the *lists* window, if it is not already open (in the ribbon's **view** tab, select **contact lists**).
6. Right-click your sample list and select **monitor**.
7. Click the **statistics on mails** tab. Take a look at the details it shows.

Session 309 Viewing, editing and coding results

Outline

Topics

In this session, we will look at:

- Viewing interim results
- Editing data
- Managing questionnaire changes on live surveys
  - *CATI ONLY* Semi-open question management

Learning outcomes

After this session, you will be able to:

- Look at completed survey data during fieldwork
- Make changes and corrections to individual interviews
- Put updates to surveys live when changes or corrections have been made to the questionnaire script
- Code “Other [specify]” answers from semi-open questions *CATI ONLY*

Material covered

Viewing interim results

'Visualize data' results view

While fieldwork is in progress, you can examine the data that has been collected so far in specific questions.

To visualize your survey data:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **visualize data…**.
3. In the left-hand pane, select a question whose data you want to view, and click the **right arrow**. It moves into the right-hand pane.
4. Repeat step 3 for each question you want to view.
5. Click **OK**. The results appear in a separate window.

'Analyse live data'

From askiafield **supervisor**, you can open the live data directly in askia**analyse** and from there create charts and tables, even when the survey is currently running. This option is available as long as the data is being stored in a SQL database (as opposed to a QES file).

To analyse your live data:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **analyse live data**. Your current data opens in askia**analyse**.

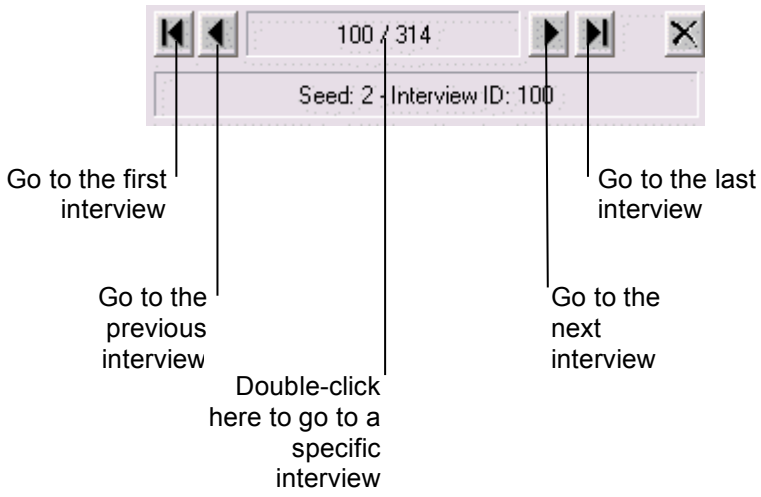
Editing data

You can also make changes to the data while fieldwork is still in progress.

To edit interview data:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **modify interview…**. *Fast entry mode* appears, which allows you to make changes to interview data.

3. You can switch to a different interview by using the navigation controls, as follows:



4. To edit the data in a question, click the question name. Then, simply change the data.
5. An interview that is flagged as completed is counted towards quotas. You can remove this status simply by clearing the **completed** check-box.

To perform quicker data entry, you can use the keyboard to enter response numbers. If you edit the data in a single-coded question, you will automatically move on to the next question. For other question types, press ENTER to navigate to the next question.

Managing questionnaire changes during fieldwork

When your survey is live, you will sometimes need to make changes to the questionnaire. For example, you might want to correct the wording in a question, or even add new questions to the survey. It is very easy to make these changes in askiafield. There is no need to take the survey offline: the changes can be made while the survey is "live".

To make changes to a live survey:

1. Open the *tasks* window (in the ribbon's **view** tab, select **tasks**).
2. Right-click your survey task and click **edit working copy…**. If askia**design** is installed on the askiafield CCA server, then the questionnaire will open automatically, and you edit it immediately.
3. Make your edits to the questionnaire in askia**design**, and save your changes.
4. In the tasks window, right-click your survey task and select **update task…**. Your edits are merged into the live project.

Semi-open management *CATI ONLY*

Coding other [specify] responses to semi-open questions in the askiafield supervisor module questions using the Kodim module.

Kodim

It is possible to code

- open-ended questions
- other [specify] responses to semi-open questions

by using the *Kodim* module. The Kodim module is beyond the scope of this course. A separate, optional course is available to cover Kodim.

Defining new coding agents

If Kodim is used at your site, you need to be able to set up coders as agents so they can access the Kodim module.

To set up a new coding agent

1. In the *Agents* window, right-click and select **new**.
2. In **name**, enter the user name that will appear on screen for the coder, and which he or she will use to log in.
3. In **password**, enter the password the coder will enter during login.
4. Record other details (**first name**, **last name**, **email**, etc.), as appropriate.
5. In **restrictions**, select the appropriate restriction set defined for coders.
6. Click **OK**. The agent is created.

Associating coders with questions to code

The questions that coders are allowed to work on is determined by allocating them to one more coding groups. Each group will refer to just one question in a survey, so to allow a coder to work on two questions in one survey, you would create two groups and then assign them to both groups.

To give agents access to a survey question for coding

1. Go to the *Group Hierarchy* window.
2. Right click and choose **New Coding Group**.
3. Enter a name for your group in the **Name** field of the **General** tab, e.g. a combination of the name of the survey and the specific question.
4. Optionally, enter a description into the **Description** field.

5. Click on the "…" button and select the survey from the list that appears, then click **OK**.
6. Enter the Context tab.
5. Click on the "…" button next to **Source** question and select the question to be coded from the list that appears. This will be an open question.
6. Optionally, select a one or more additional questions as the **Context**, for example, where it is important for the coder to understand the context of the answer from the answer of another question, in order to code the answer accurately.
7. Click on the "…" button next to **Target** question and select the question to contain the coded answer. This will be an closed question.
8. From Interview selection, choose whether the coder will be able to work on only *complete* or *incomplete* interviews, or *All Interviews*.

9 Optionally, define the additional filter, if instructed to do so. This requires an Askia Script definition to be entered.

10. Click **OK**.

Recap

In this session on viewing, editing and coding data, we have:

- Seen how to view interim results in the 'visualise data' view and also (if available) using the 'Analyse Live Data' capability.
- Edited completed interviews using the 'Modify Interview' function
- Covered how to manage questionnaire changes during fieldwork
- *CATI ONLY* Coded other [specify] answers from semi-open questions

Practical exercises

1. Viewing and editing data

Follow these steps:

1. In the *tasks* window, right-click your survey task and select **visualize live data…**.
2. Choose two questions you want to visualize, and move them into the right-hand pane. Then, click **OK**, and view the results.
3. In the *tasks* window, right-click your survey task and select **modify interview…**. *Fast entry mode* appears.
4. Use the navigation control to move to record 10.
5. Choose a question, then click its name and change the data in it.

2. Analysing live data

If you are familiar with askia**analyse**, and have it set up on your system, please do the following exercise.

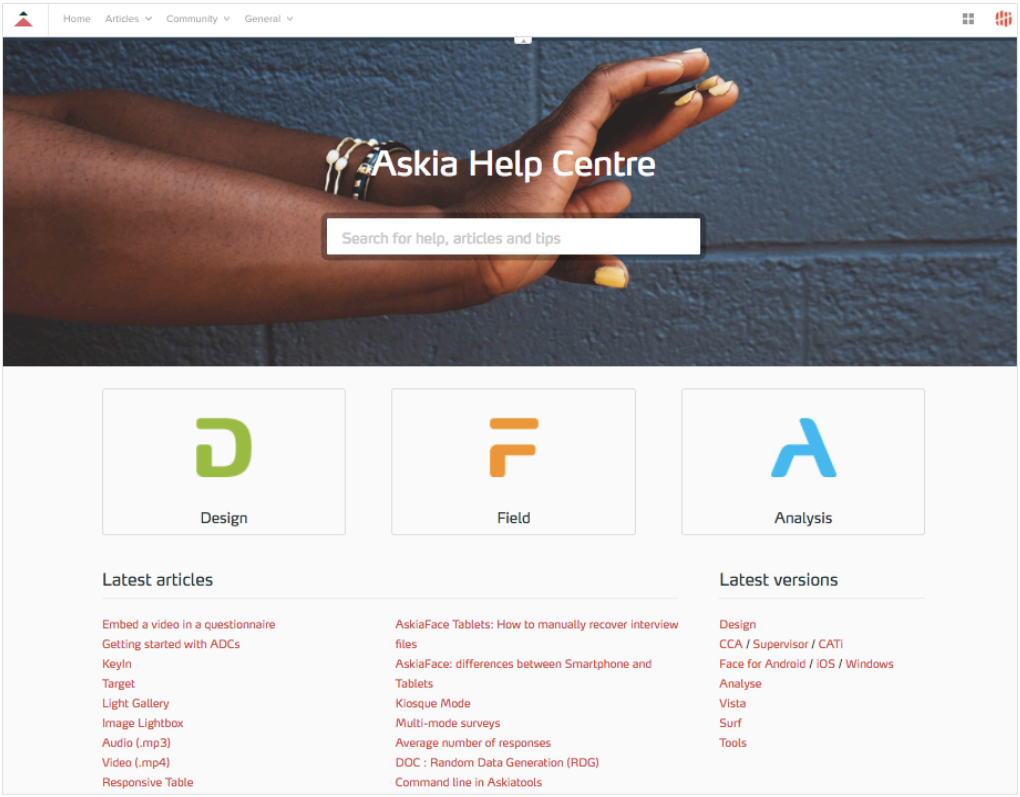
Follow these steps:

1. In the *tasks* window, right-click your survey task and select **analyse live data**. Askia**analyse** opens.
2. Create a cross-tab from two appropriate questions.

Afterword

Though you have reached the end of this training course, there is much more to learn about Askia Design. You will find more information online at **support.askia.com**.

If you have not done so already, sign up for access to our extensive **askia support** site at **support.askia.com**. This is full of useful resources for beginners and experienced **askia** users alike. You can register by clicking **sign in** at the top right, and then clicking **sign up**.



At the support site, you can also access all of the current Askia documentation, in particular:

- The Askia Field Assistant (complete software documentation).
- A searchable database of articles about specific applications of Field, as well as many worked examples using the software to solve different problems.

These will help you to continue to learn about the many other capabilities of Askia Field, as well as new ones as they are added.