

Askia Training

Course 300

Askia Field
introductory training



Participant's Coursebook
With Tutor's Notes

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



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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 <small>WEB ONLY</small> |
| Session 305 | CATI and CAPI operations <small>CATI AND CAPI ONLY</small> |
| Session 306 | Quotas |
| Session 307 | Call-backs and dialling methods <small>CATI ONLY</small> |
| 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.

Preparation

When preparing for this course, you will need to agree the content you will be presenting with your client contact.

If possible, provide the training materials in advance so your client can prepare copies for each participant.

Course agenda and timetable

Once you have agreed the timetable or programme with your client contact, prepare a course agenda showing the start and end times of each session, as well as any breaks, for the modes that you will be covering.

You should add these timings to the introductory PowerPoint, as well as providing it by email or on paper. You should modify one of the four suggested learning pathways (tracks 1-4). Remove the other tracks not being followed from the PowerPoint, to avoid confusion.

While updating the PowerPoint, modify the title page of the slides to show your name and, if possible, the client company's logo.

Prepare a one-sheet hand-out for the participants that give them the course timings – or email this to them. It is a good idea to have some printed copies. You may also have other specific items that you wish to add to this sheet or provide as separate sheets – e.g. guidance on their company-specific example project (see below) to be used in the exercises, info on how to access the system, and so on.

Example questionnaires

This course uses two different questionnaires:

| | |
|-----------------------------|---|
| Credit Card Survey | Example questionnaire for use by the tutor. This survey is also used in Course 100 Askia Design Introductory Training. It is designed as an online survey, but may also be used for CATI or CAPI. |
| CATI Screener Survey | This is a short survey about spectacles and contact lenses which can be used to demonstrate CATI capabilities and generate sample for web surveys. |

Documents and files provided

The example questionnaires are provided as three files, as follows:

| | |
|---------------------------------|--|
| credit card survey.doc | Word file of the credit card example survey |
| askia-creditcards.qex | Askia QEX file containing the credit card survey |
| CATI screener survey.doc | Word file of the tutor's example survey |
| askia-cati-screener.qex | Askia QEX file containing the short CATI screener survey |

| | |
|---|--|
| askia-list1.xls | An example sample files in Excel. When teaching Web surveys, this should be modified to contain the course participants' names and email addresses, to demonstrate invitation mailing. |
| mailing-template.htm named-invitation.htm named-reminder.htm | templates for use by tutor and participants |

Working with a client-provided survey or sample files

It can also be useful to work with some sample files and survey files provided by the client. Generally, we recommend that these should be relatively short surveys, so that participants can complete test interviews relatively quickly.

As a preliminary step to this activity, you (as tutor) will need to review the questionnaire and identify any topics that will require additional training or explanation. Generally, these should take place *after* this introductory training course has been delivered and the exercises completed, in order to ensure that training participants receive a consistent, controlled training experience.

Data storage format

Before you run the course, you should find out what data storage format the client uses: SQL Server, SQL Server (legacy format) or QES. When demonstrating survey tasks in the course, use this format.

At the start of the training

Setting up the room

Arrive early. Ensure you arrive to give the training in plenty of time, so that you have time to set up the room as you would like it. Make it as tidy as possible – it is distracting to be learning in a room full of clutter.

Arrange the seating. Arrange all of the seats so that your group have a clear view of the screen and also that you have a clear view of them too – so you have facial contact with each of them. Set out enough seats for the group, and put away, or move to the back or against the wall, seats you don't want to be used, so it is obvious where you want everyone to sit.

Flipchart or whiteboard. Ideally, make sure you have a flipchart or whiteboard that you can also write up important messages or notes, and the right kind of pens (indelible pens for paper; dry-wipe pens for the whiteboard).

Heat. Make sure the room is **warm**, but not too warm, and that your group will be comfortable.

Noise. Ensure the door can be closed, so that the group will not be distracted by external **noise**, and also that you won't be distracting others in the office with your training session.

Light. Adjust the **lighting** – ensure the screen is bright and visible but not dazzled from overhead lights or daylight. Don't over-dim the room: you also need to be visible to the group and you need to be able to see them.

Course materials. Set out the coursebooks for everyone – and if possible, provide them with an Askia pen to use too (or at least, pens from the stationery cupboard). Also lay out the course timetable/agenda you have created, or any other supplementary sheets you have prepared (e.g. on the company-specific example project).

Demo screen and system access. Ensure you know how to work the data projector or large screen, that you have access to the system, to the Askia software and to the directories containing the training files. After any testing, close any apps so you are starting from a 'cold start' in your training session.

PowerPoint. Finally, set the display screen to show the first slide of the course PowerPoint set – in full screen mode – so that this is on the screen when participants enter for their training.

Introductory presentation

Before you start the main training you should:

Do introductions of everyone in the group. If time permits, also:

- Ask each to say what they do
- Ask each what experience they have in (a) Askia and (b) analysis and reporting of market research surveys
- Ask each to say what they hope to get out of the course

Explain the structure of the course – use the first three slides in the PowerPoint presentation *Course100.ppt*.

Explain the timings: start times and end times – and when break times will occur

Explain the materials and resources they will be using:

- A participant's coursebook each
- Access to Askia design
- Access to the training files

If necessary, explain where they will be able to find the files

Check that everyone has the materials and resources they need

Ask if there are any questions

Continue on to Session 101

Checklists

This check-list summarises the points described above. Please refer to the more detailed descriptions above, for more information.

During preparation

- Discuss course timings and participants with client and agree schedule
- Update agenda and timings in training course PowerPoint

- Discuss the example projects with client (you can forward the Word files) and review whether additional time should be allowed after the course to work on a “real” project.
- Obtain the example project and work through which questions and examples will be used in each exercise (see content checklist, above)
- If necessary, where no QEX file exists, import the survey and/or program those parts needed for the exercises to work.
- Agree who will print and bind the coursebooks for participants (double-sided and bound or in a folder is the preferred presentation)
- Ensure that there are printed copies of the Mobile Internet survey, for use by participants during the exercises.
- If you are covering askia**word**, ensure that participants will have access to the askia**word** version of the Mobile Internet survey, with the questions and responses already marked up, so that they can open it quickly in Word.
- Prepare and print any supplementary notes – agenda, example project info, etc.
- Sort out access to the system, server etc at the client company – will you be using their PC or yours?
- Establish who will be able to update the IE settings on participant's PCs to access askiavista.
- Check the training room will have a large screen or projector you can use; Internet access for you to use; whiteboard or flipchart and pens
- Check there will be one PC for each participant or each pair of participants
- If you are not familiar with the system configuration and how Askia is deployed, check with the Askia team member responsible for the set-up, or with your client. Verify, in particular, where/how askiavista is deployed, and if projects are stored in SQL.
- Check any other arrangements with your client contact immediately before your visit – explain that you would like to have access to the room at least 30 minutes before your first session begins, in order to get it ready.

Using an alternative project for participant exercises

If the students are going to be using an alternative to the Mobile Internet survey for the exercises (e.g. the client's own project), it should include **at least** the following items:

- Two single-coded questions.
- Two multi-coded questions, preferably with at least one including an other (specify) type response.
- An open text question.
- An open numeric question.
- A grid.
- Chapters (if not present in study provided, you can add these in as appropriate).
- Demographic questions.

- A structure where respondents might skip at least one question, depending on earlier answer/s given.
- Also ensure that:
 - you have a version of this study in Microsoft Word format;
 - you have marked it up in askia**word**, leaving a few questions for the participants to mark up for themselves;
 - participants will have access to an electronic copy of the marked-up file, so that they can open it in Word;
 - you have printed copies to give to the students for use during the exercises.

On the day

- Arrive early
- Arrange the seating and tidy away unwanted seats, clutter etc – make the room as tidy as possible
- Adjust the lighting and temperature as appropriate
- Check for noise or other distractions; check you will be able to keep the door closed
- Set out coursebooks, agendas and pens for all participants
- Check you have access to the software, the Internet, the example projects you need and any passwords required
- Check you have the latest version of askia installed on your PC and on the participants' PCs (see Quick installation, below)
- Check whiteboard or flipchart – and that you have the right pens for each
- Ensure you have a glass or bottle of water to hand
- Ensure you know how to reach your client contact from the training room, in case of any problem
- Check PowerPoint slides load and have been edited for this client (and not for another client!)
- Finally, have PowerPoint open in presentation mode. This should be open, showing the welcome screen, when participants arrive

Software update, if required

The best way to ensure you have the latest Askia version of software, including the latest templates is to download and install the latest version. This can be found at <https://dev.askia.com/projects/support/files>. When installing the new version, make sure you uninstall the previous version of AskiaSuite (through control panel) before performing the installation.

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:

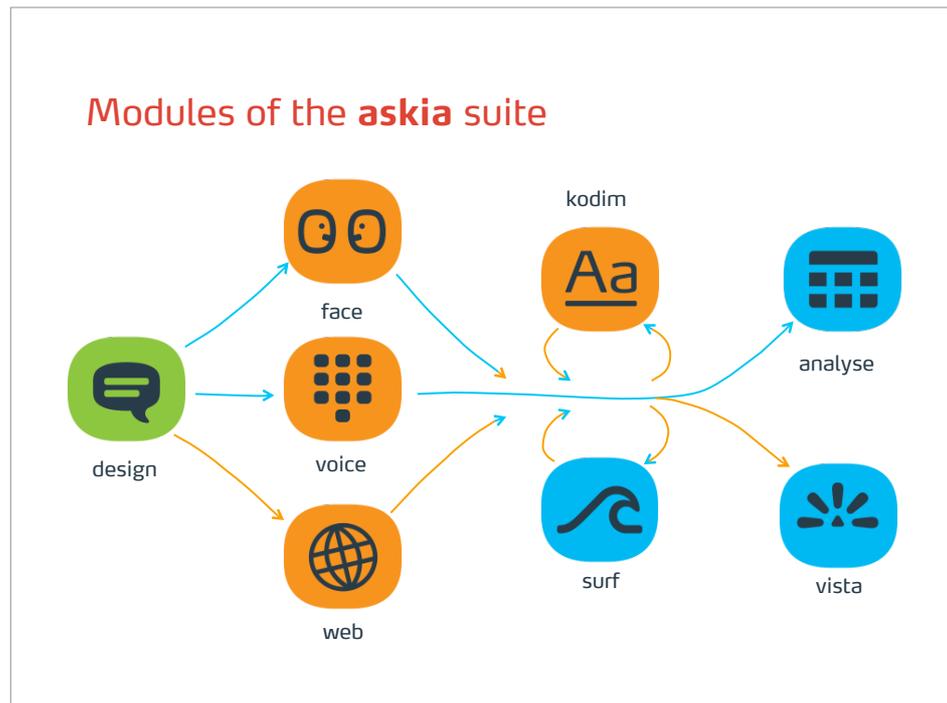
- The different field modules within the Askia software suite
- The additional functions that an integrated dialler provides
- How to connect and create a Workspace
- How to organise your Workspaces
- The role of the CCA background process

Tutorial

Modules in the Askia Suite

The modules of the software

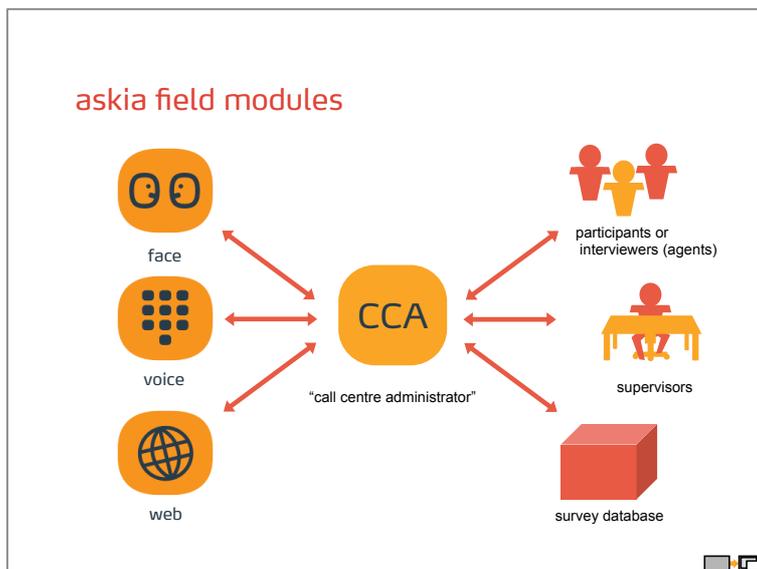
→ Show next PowerPoint slide in course300.ppt



- Explain that there are three complementary modules involved in data collection: askia **voice** for CATI and askia **face** for CAPI and askia **web** for online surveys
- Explain that askiadesign is used to prepare surveys for execution in any of these fieldwork modes
- Explain that it is possible to create one survey to execute in all three data collection modes, though most surveys only use one mode
- Explain how **Kodim** is used to perform coding of any open-ended answers given by respondents
- Explain which mode you will be using for the majority of your examples and also for participants to focus on when writing their example survey during the practical sessions.
- If the client is using the optional dialler module, mention this, and explain that it allows certain functionality, such as automatic dialling and listen-in.

Field modules

→ Show the next slide



→ Explain that the CCA runs in the background, coordinating communications with between different interviewing modules and also between interviewers or participants (on web surveys) and supervisors, and between the system and the survey database, where all scripts and survey data are held.

→ Explain that although CCA stands for “call centre administration”, the module is relevant to all interviewing modes.

How to log in and connect

Logging in

Starting the program.

→ Demonstrate how to start askiafield **supervisor**, and log in.

■ Notes for participants



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

Auto-selecting the username and password.

→ Explain that some parameters can be added to the Windows shortcut in order to simplify the logon. Explain the following parameters, and show an example of them in use on a Supervisor shortcut:

- `-user:xyyyzz`
- `-password:xyyyzz`
- `-CCA:nnn.nnn.n.n` (for specifying the IP address).

■ Notes for participants

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

Workspaces and the different data collection modes

Each data collection mode has a workspace which allows you to control all the components of that mode – e.g. projects, agents, sample, web servers and so on. These vary according to the mode.

→ Demonstrate the workspaces relevant to each mode, as follows.

Face-to-face

Using askiaface for CAPI or face-to-face surveys with a laptop or tablet

- Explain or demo a face-to-face project and show its workspace
- Explain the concept of the different windows, and demonstrate how to:

- show a window from the **view** tab in the ribbon
- hide a window by closing it

- Make sure you demonstrate these windows: tasks (surveys), agents and groups
- Explain the relationship between tasks, surveys and projects
- Show that you can customise the screen layout, and save it as your own custom workspace

Telephone

Using askia**voice** for CATI or telephone surveys

- Explain or demo a telephone project and show its workspace
- Explain the concept of the different windows, and demonstrate how to:
 - show a window from the **view** tab in the ribbon
 - hide a window by closing it
- Make sure you demonstrate these windows: tasks (projects), contact lists (sample), agents and groups, calls, alarms. (Note: setting this up is covered later)
- (If not already done:) Explain the relationship between tasks, surveys and projects
- Show that you can customise the screen layout, and save it as your own custom workspace (if not already demonstrated)

Web

Using askia**web** for CAWI or online surveys

- Explain or demo a web project and show its workspace
- Explain the concept of the different windows, and demonstrate how to:
 - show a window from the **view** tab in the ribbon
 - hide a window by closing it
- Make sure you demonstrate these windows: tasks (projects), contact lists (sample), web connections. (Note: setting this up is covered later)
- (If not already done:) Explain the relationship between tasks, surveys and projects
- Show that you can customise the screen layout, and save it as your own custom workspace (if not already demonstrated)



Agents CATI AND CAPI

Roles for agents

→ Explain how agents can be given different roles: standard agents for interviewing and supervisors

■ Notes for participants

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

→ Demonstrate setting up an agent, in the **agents** window

■ Notes for participants

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

→ Demonstrate setting edit an existing agent, in the **agents** window

■ Notes for participants

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

Defining agent roles.

- Explain that you select a **restriction pattern** for each agent, which defines his or her role.
- Explain the main supervisory agent levels: administrator, supervisor
- CATI OR CAPI Also explain how to define an interviewer agent.
- Define the agent you just set up by selecting an appropriate restriction pattern in their **properties**.

■ Notes for participants

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

A dialler allows calls to be dialled automatically.

- Introduce the concept of dial modes and the functions that an integrated dialler provides – either explain or demonstrate the three main methods:
 - **Manual** dialling (agents have to manually key in the telephone numbers)
 - **Progressive** dialling (askiafield automatically dials the numbers)
 - **Predictive** dialling (askiafield automatically dials the numbers, before the previous interview finishes, to minimise agent waiting time between calls).

■ Notes for participants

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 also allows for calls to be recorded and for supervisors to listen in to calls while they are in progress

→ Explain, or if a demo is possible, demonstrate the “listen in” function.

■ Notes for participants

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.

Workspaces and the Askia CCA

Workspaces are handled by the CCA.

→ Explain that when you define a workspace, you are effectively communicating with the CCA.

Recap

→ Provide a one-minute summary of the topics covered and then prepare participants for the exercise.

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

→ Ask participants to complete this 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

Tutorial

Survey initialisation

Files used

Each survey task requires a questionnaire definition. The questionnaire is created in askiadesign and is defined in a QES or QEX file.

→ Explain the role of the QES or QEX file:

- Explain that the QES file is the questionnaire; QEX file contains the questionnaire, but can also contain data.
- Explain that when you upload a QEX file, a QES is created in the survey's working directory.

→ Explain how paths are used to get to the files

■ Notes for participants

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 askiafield is represented as a **task**.

→ Explain that the first stage in setting up your survey is to create the survey task; demonstrate setting up a task (use the askia-creditcards.qex survey).

→ Show the two task creation methods:

- tasks window->right-click->**new survey**;
- drag and drop a QES/QEX into the tasks window.

■ Notes for participants

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.

The work directory

The work directory is where the data is stored, if you are storing the data in a QES (as opposed to a SQL database).

- Explain the concept of the work directory, and show where it is specified in survey properties
- Explain that audio files are saved there, if you are automatically recording calls either from routing in the survey, or from the task properties.
- Explain about "work directory" and "path":
 - The "path" is where the QES is located.
 - the "work directory" is usually the same, but you can specify another location. This is where any audio recordings are saved.

Survey options

Setting appropriate options for your survey

- Explain the main fields in the **general tab** (there is no need to define the other tabs at this time, as some are mode-specific)

- **keep incomplete interviews:** explain that this option will result in non-completed interviews being saved.
- **Interview storage:** explain that this option allows you to control whether a SQL database or QES file is used to store the data.
 - Explain which data storage option they should use in their organisation: QES file, SQL Server or SQL Server (legacy format)
- explain **survey progression**
- explain that you should not use special characters or spaces in the **survey name**, especially for Web surveys
- explain that the filename prefix of the QES or QEX file is used by default as the task name:
 - this can be overridden, but it is better to plan for this by giving an appropriate filename when designing the survey.

■ Notes for participants

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 | <p>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.</p> <p>Note that if, during an interview, a “go without saving” routing is triggered, then the data will not be saved, irrespective of this setting.</p> |
| Interview storage | <p>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.</p> <p>You cannot change this option once the survey is live.</p> |
| Survey progression | <p>This determines the available navigation options during CATI surveys ^{CATI ONLY}. The options are as follows:</p> <ul style="list-style-type: none"> • 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

→ Provide a one-minute summary of the topics covered and then prepare participants for the exercise.

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

- Ask participants to complete this exercise.
- Use any of the available QEX files.

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

Tutorial

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

- Explain that sample files contain one contact per line, and this line will contain a phone number for CATI
- Explain that sample files for web for the web need to contain an email address.
- Open a sample file in Excel and explain the fields.
- Explain we use Lister to transform an Excel or Access list of contacts into the LST format required for Askia sample files.

■ Notes for participants

You can provide sample in the following formats:

- Excel
- Access

Sample fields

- Explain the fields we use:
 - Telephone for CATI; explain that this field is compulsory for CATI.
 - Email for CAWI (if available); explain that this field is compulsory for CAWI.
 - Contact name (if available);
 - Demographics (if available)
 - Sample ID or customer number (optional)
 - Other optional fields, where available in the sample – for example, the individual's name or company name.

■ Notes for participants

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

Lister will transform an Excel or Access list of contacts into the LST format required for Askia sample files.

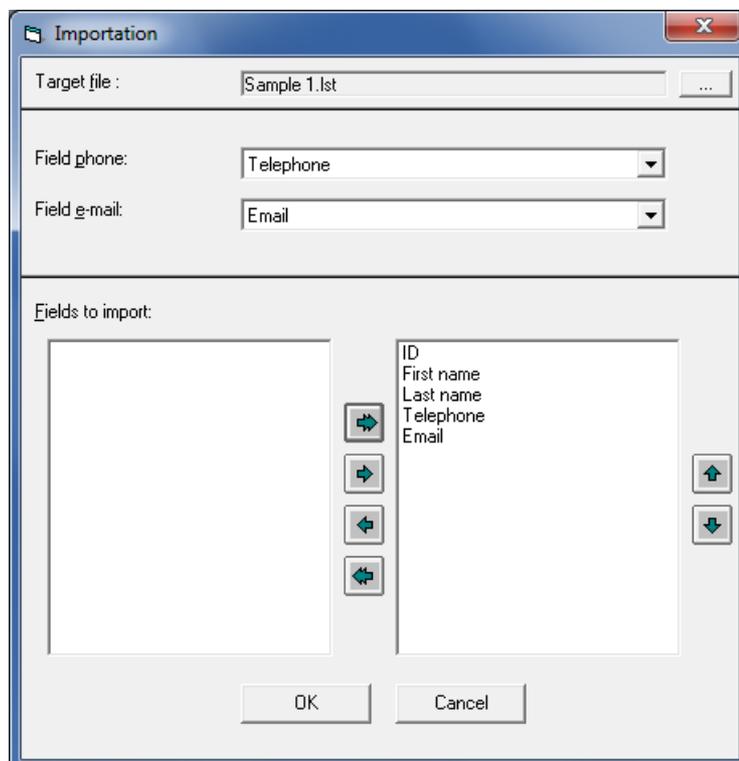
→ Demonstrate using Lister to transform an Excel or Access list of contacts into an Askia .LST sample file. Use the file CATI screener sample list.xls.

■ Notes for participants

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

→ Explain that 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.

→ Explain that Askia allows you to deal with this in two ways:

- 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.
- You provide the panel provider with a series of generated links

→ Explain that 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.

→ Explain that links will be covered in more detail in Session 304.

→ Discuss any other considerations (depends on client, and requirements of panel provider)...

■ Notes for participants

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

Adding the sample list to an Askia task and viewing it in sample list view.

- Demonstrate adding a single sample list file, in the sample lists window.
- Associate the file with your survey task (in the task properties).
- Verify that the sample has been added by viewing the list in sample list view; the associated task is shown in the target column.

■ Notes for participants

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

Adding multiple samples list to an Askia task.

- Demonstrate adding two more sample list files.
- Associate them with your task.
- Explain (and show) the following options in the **sample lists** tab of the task properties:
 - Explain the option **finish a list before starting a new one** .
 - Demonstrate the options for changing the sample list order.

■ Notes for participants

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

→ Explain how **Groups** allow you to assign a number of agents to work on a task.

■ Notes for participants

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

Creating a group and assigning the group to the task.

→ Explain that it is best to have separate groups for testing and for live work; this means that you can clearly see when a sample list/task is live and when it is being tested.

→ Demonstrate creating a group, in the **group hierarchy** window.

- Explain that this will be a group for testing projects, but that creating a group for interviewing is an almost identical process.
- Name the group testing group
- In the **dialing** tab, set the **brief mode** option; explain that any interviewing done by the group will not result in any stored data. Of course, you would not set this option on a standard group.

→ Demonstrate assigning the group to a CATI task (in the group properties). Show that the task name is displayed in the group hierarchy window.

■ Notes for participants

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

Agents may be assigned to one group at a time in CATI as they may only work on one CATI project at once.

- Explain that an interviewer may only be assigned to one CATI group at a time: assigning them to a group will remove them from the previous group they were assigned to.
- Demonstrate adding people to the group, by:
 - right-clicking the group and selecting add agents;
 - dragging and dropping agents to the group, when assigning multiple users.

Groups in CAPI CAPI ONLY

- Demonstrate creating a group, or if you have just done this for CATI, explain that the general principal is the same, and set up a group.
- Demonstrate assigning the group to a CATI task (in the group properties). Show that the task name is displayed in the group hierarchy window.

■ Notes for participants

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

Assigning agents for CAPI projects.

- Explain that in CAPI, an interviewer can be assigned to more than one group at a time, allowing them to work on more than one survey at once. Unlike CATI, adding them to a new group will not remove them from any previous group assignments.
- Demonstrate adding people to the group (show both the right-click and drag-and-drop methods, if not done previously).

→ Also demonstrate how to remove an interviewer from a group (right-click agent in group hierarchy window, and select **delete**).

■ Notes for participants

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

→ If time permits, show how to remove an agent from a group and also several agents from a group.

■ Notes for participants

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

→ Provide a one-minute summary of the topics covered and then prepare participants for the exercise.

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

- Ask participants to complete these exercises.
- **Important:** If your group is setting up a web survey, you will need to ensure they use the sample list file containing their names and email addresses; this will allow them to try out invitation emails in the next session.

1. Adding sample

Follow these steps:

1. Open the Excel sample file your tutor gave you, and examine the contents.
2. Open **askialister**, 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 **askiasupervisor**, 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 **askiasupervisor**, 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 askiasupervisor, 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

Tutorial

Survey links

The principal components and options of the survey link.

→ Display slides 14-19 in the PowerPoint presentation Course300.ppt starting with this slide:

Survey links can be open or individual

| Open links UNRESTRICTED ACCESS | Individual links RESTRICTED ACCESS |
|--|---|
| 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 <u>complete</u> a survey before the link expires |
| Can't track participation at an individual level | Can track participation and issue reminders only to non-responders |

→ Demonstrate how you can obtain the StartSurvey link for any survey defined in the CCA by locating the survey task, and right clicking on its name.

■ Notes for participants

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

■ Notes for participants

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 | Following the link again will resume the |

| | |
|--|--|
| the survey from the beginning. | interview from the last point reached until finished. |
| Anyone can take the survey multiple times. | Can only be used once to <u>complete</u> 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

■ Notes for participants

```
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

■ Notes for participants

```
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

■ Notes for participants

```
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=LLXCGMWWUI  
QCQOT@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

■ Notes for participants

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

Testing web surveys.

- Start a test survey (right-click the survey task and select **start web survey**) and step through the questions.
- Create a test link and use this to create the survey

■ Notes for participants

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

Making a survey live.

- Explain that you first have to upload the project to the web server (task properties, **webprod** tab, right-click connection, select **add this survey**; ensure **web survey** is selected).
- Demonstrate how to set the survey online (task properties, webprod tab, right-click connection, select **set online**).

■ Notes for participants

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

Starting or stopping the sample list automatically on schedule.

- Explain that the sample list doesn't have to start or stop automatically – you can schedule when it is active.
- Demonstrate setting up scheduling (sample list properties, **scheduling** tab, **add...**, select **telephony**, set timings on the **schedule** tab).
- Show how to disable (and re-enable) schedules (right-click schedule and select **disable** or **enable**).

■ Notes for participants

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

Concepts: the format and function of the invitation.htm file

- Explain that askia allows you to issue invitations directly to all of the individuals in your sample list, provided that you have a valid email address within the file.
- Explain that CCA will effectively perform a mail-merge to create personalised invitations, which can each be personalised with the person's name or other relevant information.
- Explain that CCA will also generate all the personalised links and insert these into the email invitations.
- You can demonstrate this using the file **mailing-template.htm** for a non-personalised one and

■ Notes for participants

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

Including information to personalise the invitation emails

- Explain that you can use information from the questionnaire, or from the sample list, if you are using one.
- Explain that to include this information in the email, you just need to include the field name in square brackets, exactly as defined in the Askia design module. For example:

- Dear [name]
- You recently bought a [car_model]

- Use either **named-invitation.htm** or your own variant of this file

- Show how to edit an existing **email template** for the invitation email (in the sample list's **mail templates** tab):

- loading the mailing-template.htm template;
- setting the subject line and message body;
- adding the [ccaDoPanelLink] keyword to the email, so that the recipient has a link to use;
- personalizing the message by adding fields (with the field name in square brackets): e.g. Dear [name].

■ Notes for participants

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

- Explain that the keyword **[ccaDoPanelLink]** will insert the individual link in your invitation email. The system will put the correct link (including any unique panel ID, where applicable), into the email.
- Explain that when you use an individual link, you will be able to track participation and issue reminders only to those who have not yet completed the survey.
- Explain that reminders can also be personalised in the same way as invitations.
- Explain that it is also possible to issue invitations for surveys that do not allow resuming; this is covered in the Knowledge Base article "Possible AskiaExt Links" (available at <https://support.askia.com/hc/en-us/articles/200077011-DOC-Possible-AskiaExt-links>).

■ Notes for participants

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 **askiaweb** section:

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

Sending out the invitations

Sending a test email.

- Demonstrate how to send a test email (in the **mail templates** tab, click send **test email**).
- In the sample list's **mailing** tab, explain the following options:
 - using the **mail** grouping option (to avoid spam filters);
 - how to send plain text email as well as HTML, for recipients who cannot, or choose not to, receive HTML emails.

■ Notes for participants

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

Sending the invitation emails.

- Demonstrate how to send invitation emails (right-click sample list, then select **mailing**, then **start invitation mailing...**).
- Explain you can specify a number of emails; if you want to send out invitations to the whole list, enter 0 (zero).
- Explain that you cannot send out invitations if you have already reached your sample quotas.

■ Notes for participants

Askiacfield 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

Sending reminder emails to a schedule.

- Use either **named-reminder.htm** as a model, or your own variant of this, and create a suitable reminder to use.

- Demonstrate how to set up a schedule to automate invitation emails (right-click sample list, then select **properties**, then click the **scheduling** tab and define the schedule).
- Explain about the maximum number of reminders to be sent, and how to set the interval between emails, both of which allow you to avoid emailing recipients too often.

■ Notes for participants

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 60.

Links when working with external panels

- Explain that 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.

→ Explain that their notes refer to a Knowledge Base article that provides more information

■ Notes for participants

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

→ Provide a one-minute summary of the topics covered and then prepare participants for the exercise.

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

→ Ask participants to complete the following exercises (for **testing and launching projects**, you will need to select an appropriate interviewing mode for the client and they should do the corresponding exercise).

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

Tutorial

Testing and going live

■ Notes for participants

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

Putting a CATI survey into **brief mode**, allowing agents to preview the survey before fieldwork begins.

- Explain that in brief mode, no data will be recorded; this is just for testing.
- Explain that it's best practice to use **separate agent groups** for briefing and live projects; this is to help prevent accidental use of brief mode, and therefore to avoid accidentally ending up with no data.
- Show how to set brief mode on a group (group properties, **dialling** tab, select **override defaults**, then **brief mode**).
- Explain that while you can set brief mode on a survey task, it's better practice to use specific training groups for brief mode, as that makes it much easier to keep track of when brief mode interviewing is taking place.

Setting the survey running.

- Explain that to start the survey, you need to activate one or more sample lists (in the sample lists window, right-click the list, and select **telephony**, then **start**).
- Explain that because it is in brief mode, no data will be recorded.

■ Notes for participants

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 46 for details.

Going live with a CATI survey ^{CATI ONLY}

Launching CATI fieldwork.

- Explain that to go live, it is the same as for testing; you need to switch off brief mode.
- Demonstrate stopping the telephony on the list, and turning off brief mode.

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

→ Starting telephony:

- If no real agents have been assigned, demonstrate starting telephony (see warning above);
- If it is not safe to start telephony (i.e. numbers might be dialled), just explain how to do it).

■ Notes for participants

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 35. 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

Testing.

- Explain that to test a CAPI survey, you need to create scripting in the questionnaire.
- Open the survey in askiadesign, and demonstrate:
 - at the start of the questionnaire, add a single-coded 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 takes effect when “test interview” is selected.
- Explain that when you want to go live, you can use askiadesign to hide the initial question.
- If possible, demonstrate connecting a device to the askiafield CCA machine, and transferring the survey files, and then show a test interview.

■ Notes for participants

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}

Going live.

- Explain that you need to hide any “test interview” question in askiadesign. Demonstrate this.
- If possible, demonstrate connecting a device to the askiafield CCA machine, and transferring the survey files.

■ Notes for participants

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 askiaface or askiafaceforCE. 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

Starting or stopping the sample list automatically on schedule.

- This duplicates the material in the previous web-only session and does not need to be repeated in detail – but step through the process in the context of CATI or WEB to reinforce understanding, and make clear that these steps also apply to these modes.
- Explain that the sample list doesn't have to start or stop automatically – you can schedule when it is active.
- Demonstrate setting up scheduling (sample list properties, **scheduling** tab, **add...**, select **telephony**, set timings on the **schedule** tab).

■ Notes for participants

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

- Show how to disable (and re-enable) schedules (right-click schedule and select **disable** or **enable**).

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

→ Provide a one-minute summary of the topics covered and then prepare participants for the exercise.

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

→ Ask participants to complete the following exercises (for **testing and launching projects**, you will need to select an appropriate interviewing mode for the client and they should do the corresponding exercise).

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-click 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 askiasupervisor, 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

Tutorial

Quota sources

- Explain that quotas can be drawn from either the **questionnaire**, or the **sample list**.
- Explain that when the quota is based on a question in the questionnaire, it is better to put those questions as close to the start of the interview as possible, so as not to waste anyone's 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.

■ Notes for participants

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

The quota models.

- Explain there are two types of quota model:
 - **Simple** quota targets;
 - **Nested** quotas with different levels;
- Explain that only variables that have set as "available for quota" in askiadesign can be used for quotas.

■ Notes for participants

There are two quota models available in askiafield:

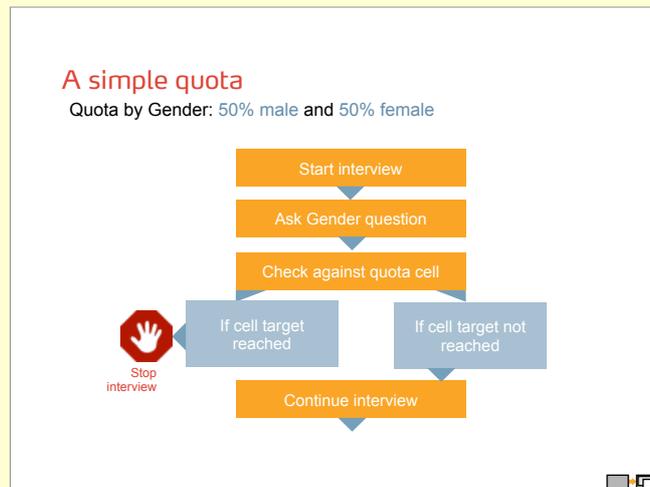
- **Simple** quota targets;
- **Nested** quotas with different levels.

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 askiadesign can be used.

Simple quota targets

Defining a **simple quota**.

→ Show PowerPoint slide 22 then return to Askia to demonstrate



→ Demonstrate defining quota targets for a **simple** quota variable (right-click the survey task, and select **define quota**).

- Use a suitable question as the basis of the quota (for example a gender question).
- Enter appropriate targets (e.g. 50/50 for each gender).
- Explain that you could also set up the equivalent quota from a sample list, if the gender field is available there; explain how to set this up in the define quota window.

■ Notes for participants

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

Defining a **nested**, or **crossed**, quota.

→ If using the population table below, show the next PowerPoint slide, which presents this table.

→ Show PowerPoint slide 23 then return to Askia to demonstrate

A nested quota
Quota Age by Gender

| Age | Gender | Male | Female |
|-------|--------|-------|--------|
| 18-34 | | 15.0% | 14.3% |
| 35-64 | | 24.9% | 25.5% |
| 65+ | | 9.2% | 11.2% |

England & Wales, 2011 Census data

→ Demonstrate defining quota targets for a **crossed** quota variable (right-click the survey task, and select **define quota**).

- Show how to enter the total target sample size.
- Create a crossed quota using suitable variables, including appropriate quota targets. For example, set up region within sex by age from census data (from slide 23), as follows:

| England & Wales 2011 | Male | Female |
|----------------------|-------|--------|
| 18-34 | 15.0% | 14.3% |
| 35-64 | 24.9% | 25.5% |
| 65+ | 9.2% | 11.2% |

- Demonstrate how to set up a **nested quota**, by setting up age within gender, using the above figures.
- Show how to enter quota targets as absolute figures, or percentages.

■ Notes for participants

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:

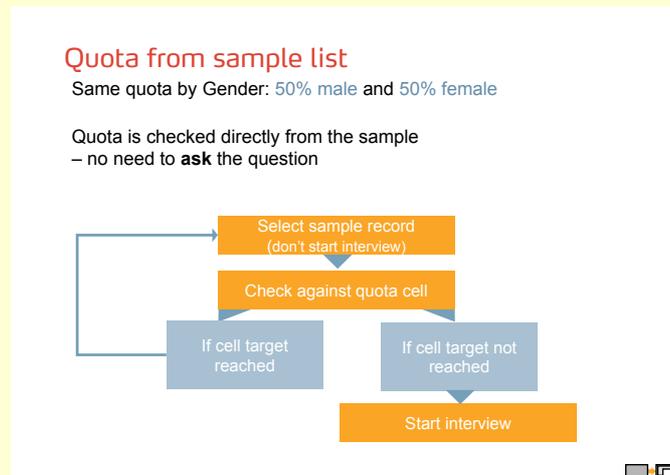

4. Select the first question you want to use as the basis of the quota. Note that you can only select questions which have the option **available for quota** enabled.
5. In **target sample size**, enter the overall number of interviews you want to conduct.
6. For each quota, enter the **target count** 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 quota from the sample list.

- Show the next slide in the PowerPoint deck. This contains two builds – one which shows reaching a full quota cell and the second shows checking an open quota cell.



- Demonstrate setting up a quota based on gender from “example sample list B”.
- Show the quota monitor window (right-click task -> **monitor**). Explain that you can change the priority and behavior of sample list quotas here, including blocking or ignoring quotas.

■ Notes for participants

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

Quota priority and behaviour.

- There are three linked slides (slides 25-27) that cover setting quota priority and behaviour at a conceptual level. Present all three, before returning to Askia to demonstrate the capabilities.



→ Explain:

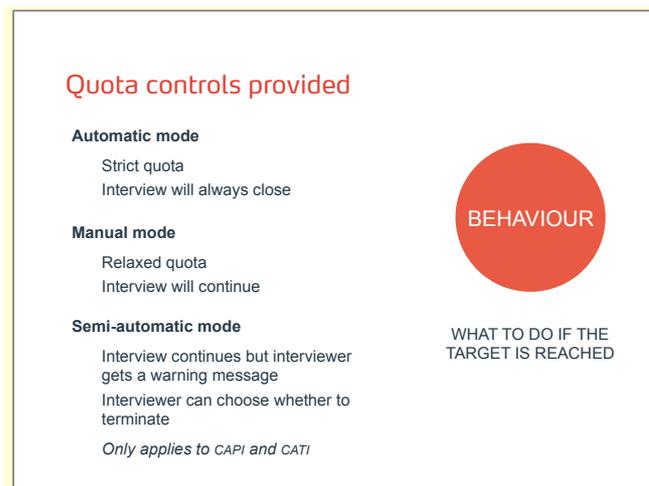
- you can set the **behaviour** for different quota category. This determines how strictly the quota is enforced.
- you can also set the **priority** for each quota category. This controls the speed at which sample is used for this category.

■ Notes for participants

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



- Explain that when an interview exceeds the target for its respective quota cell, the interview will normally close – and this is called a ‘strict’ or ‘blocking’ quota.
- Explain that you can also instruct askia to ignore this rule, and continue with the interview, even if the quota target has been reached – which is called a ‘relaxed’ or ‘non-blocking’ quota, when the interview will be allowed to continue.
- Explain that **quota behaviour** setting determines whether interviews are stopped when the quota is full.

→ Explain the possible settings:

- **automatic** means 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 (non-blocking) quota. If the quota is full, the interview can still go ahead; no warning is given at all. You can block interviews when the quota is full with the use of dedicated scripts in the questionnaire.
- **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/her own choice. This has no effect for Web and means the same as manual.

■ Notes for participants

Quota **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

→ Show slide 28 (Quota controls provided) in the PowerPoint presentation.

Quota controls provided

When quota from sample

- High CATI ONLY
- Normal
- Low CATI ONLY
- Blocked = this cell is closed off

Option for all samples

- Ignored = the priority option is off

HOW QUICKLY THE SAMPLE IS RELEASED

Askia uses sophisticated predictive algorithms to balance the rate at which new sample is presented for High, Normal and Low settings

- Explain that askia uses advanced predictive algorithms to balance the rate at which sample is presented, when set to **high**, **normal** or **low**.
- Go back into the quota definition window, and show/explain the different priority levels (high, normal, low, blocked, ignored).
- Demonstrate also the Quota behaviour options, if you have not already done this.

■ Notes for participants

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

- Provide a one-minute summary of the topics covered and then prepare participants for the exercise.

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

→ Ask participants to complete the following 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

Tutorial

Call result codes

Managing the call result code list.

- Show the call result codes list (in the task properties).
- Demonstrate renaming a code (change the code user-defined 1 to Screened out).
- Show how to hide codes for CATI interviewing (explain that we recommend this once fieldwork has started, rather than deleting codes).
- Add sub-result codes of quota reached (age and region).
- Explain that you can save the code list, and it can then be applied to future surveys. Show how to load and save code lists.

■ Notes for participants

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

- Explain that you can control the frequency of callback attempts.
- Demonstrate how to set callback settings on a task (task properties, **callback** tab).
 - Explain the option **attempts**.
 - Explain the **next attempt** setting, and point out that it is not available if **attempts** is set to 1.
 - Explain the options that determine the interval:
 - **after** (sets the interval before the next call, in elapsed time, even if the sample list is not active – e.g. no shifts are working on it);
 - **after running** (sets the interval, but only counts time where the sample list is active);
 - **next shift** (schedules the callback for the same relative time position in the next shift).
- Explain that in-depth coverage of shifts is beyond the scope of the course, but there that the other options are contained in the Askia Field Assistant.
- Explain that these can also be set on the sample list; this over-rides any settings for the task.
- Demonstrate copying/pasting settings from a task to a list.

■ Notes for participants

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 <i>askiafield Assistant</i> 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

Setting the dialling method.

→ Explain the different dialling methods:

- Manual (agents dial the number themselves);

- Progressive (askiafield dials the numbers, and the questionnaire only appear on the agent's screen if someone answers);
- Progressive with preview (the same as progressive, but the agent can choose from a list of numbers).
- Predictive (similar to progressive, but askiafield will dial the next number shortly before the current interview is completed, to reduce down-time).

- Show how to set the dialling method on a task (task properties, **dialing** tab).
- Explain that the dialling method can also be set on the outbound group; this overrides the dialling settings for the survey task.
- Demonstrate how to record interviews with the dialler (in the **calls** window). There will not be any active calls, but you can show the **record** command.
- Show how to listen back to calls (in the **recordings** window). There will not be any recordings, but you can explain how to do this.

■ Notes for participants

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

→ Provide a one-minute summary of the topics covered and then prepare participants for the exercise.

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

→ Ask participants to complete these 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

Tutorial

The interviewer's and respondent's perspective

CAPI CAPI ONLY

What an interview looks like in CAPI

- Demonstrate what an interview looks like in CAPI
- Show the starting process
- Step through an interview
- Show the quota window
- Show connecting to send and explain how communications work

CATI CATI ONLY

What an interview looks like in CATI

- Demonstrate what an interview looks like in CATI
- Show logging in and step through an interview
- Explain pausing
 - Explain that agent pause time is taken into account in reports, and that you can view a report showing how long agents have spent in pause mode.
- Show setting an appointment
- Show closing an interview when a refusal occurs

Web WEB ONLY

What a web interview looks like online.

- Demonstrate what a web interview looks like, using a test survey link

Monitoring survey progress in CAPI CAPI ONLY

Fieldwork reports

→ Demonstrate how to monitor progress by examining the survey and the quota monitor.

■ Notes for participants

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

→ Show call outcomes in CATI (sample lists view, right-click list and select **monitor**).

→ If necessary, switch to interviewer mode, and do three or four more interviews, completing some and terminating others into different outcomes.

→ Show quota details by task (in the tasks view, right-click the task and select **monitor**).

■ Notes for participants

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

→ Show interviewer reports in CATI (right-click agent and select **reports**, then **agent outbound call performance**). Also, mention **agent pause details** report.

■ Notes for participants

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

→ Show how to monitor an agent in CATI (status and basic statistics shown in agents window).

→ Demonstrate the 'see-in' function to view an agent's screen using VNC (right-click agent and select **see in**).

→ If available, demonstrate the 'listen-in' function if using integrated telephony (right-click agent and select **listen in**).

■ Notes for participants

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

Fieldwork Reports provided as Crystal reports

→ Display the fieldwork reports available as Crystal reports, using the following examples:

- Agent interviewer report (CATI)
- Agent pause overview (CATI)
- Task results (including predictive) – by survey (CATI with dialer)

■ Notes for participants

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

- Explain that these fieldwork reports are written using the industry standard Crystal Reports® software from SAP, which report directly on the CCA database.
- Explain that Crystal Reports can be modified in order to create other custom reports (an advanced capability not covered in this course)

■ Notes for participants

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

Viewing progress for Web projects

- Demonstrate the **web statistics** report for task.
- Demonstrate the **task monitor's statistics on emails** tab.
- If necessary, open a browser and follow some survey links, and do three or four more interviews, completing some to the end and abandoning others before reaching the end.

■ Notes for participants

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

Crystal Reports available for lists

→ Demonstrate the reports available on sample lists.

- Show two or three reports appropriate to the client (e.g. email states, telephony calls).
- Explain that reports on lists show details for that list only, unlike reports on tasks, which show details for all associated lists.

→ Mention that Crystal reports can be modified in order to create other custom reports (an advanced capability not covered in this course).

■ Notes for participants

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

→ Provide a one-minute summary of the topics covered and then prepare participants for the exercise.

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

→ Ask participants to complete the relevant exercises:

- Exercise 2: CAPI users
- Exercise 3-5: CATI users
- Exercise 6: Web users

→ Note that these reports will not contain much data: it may only be the records you created earlier in this module. To populate these reports with more data, you could the course participants to set themselves up as agents and complete a few interviews.

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

Tutorial

Viewing interim results

'Visualize data' results view

Using the Visualize data' results view

- Explain that visualize data allows you to view the data in specific questions.
- Demonstrate this feature (right click the task -> **visualize data**), including how to specify which questions are included.

■ Notes for participants

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'

Using 'analyse live data'

- Explain that analyse data allows you to open the current data in askia**analyse** (if installed) and create charts and tables there.
- Explain that this feature is available if the data is being collected into a SQL database (as opposed to a QES file).
- Demonstrate this feature, if available; right-click the task and select **analyse live data**. Show that you can produce reports on the data as tables.

■ Notes for participants

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

Using the *modify interview* option

- Explain that modify interview allows you to change the data while fieldwork is still in progress.
- Demonstrate using modify interview (right-click the task -> **modify interview...**).
- Show how to:

- navigate to a specific data record;
- navigate to a specific question;
- edit the data in that question;
- using the keyboard to edit several questions quickly:

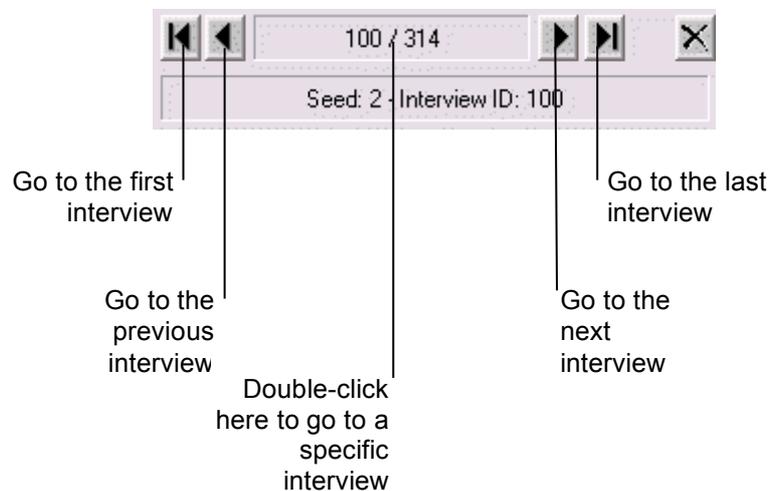
- enter response numbers in a single or multi-coded question;
- on other question types, using the ENTER key to move on to the next question.

■ Notes for participants

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

Changing the questionnaire when fieldwork has already begun

→ Explain that you can make changes to a live survey, for example:

- to change the wording on a question (e.g. to correct a typo);
- to add a new question;

→ Explain that in both situations, Askia lets you do this without taking the survey offline.

→ Demonstrate using edit working copy to add a new question.

- Explain that this downloads a QEX file, and it opens automatically in askiadesign, if it is installed on the Askiafield CCA server.
- Use update task to load the updated QEX into Askiafield CCA.

■ Notes for participants

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 askiadesign 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 askiadesign, 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.

- Explain that this capability only applies to CATI.
- Explain that this capability allows for new 'codes' found in the open answers given to be added to the precoded list of answers.
- Explain Kodim module, which will be covered next, provides a wider set of capabilities.

Kodim



- Explain that there is a separate software module called Kodim, for coding open-ended questions. Kodim is beyond the scope of this course, but is covered in another separate training module.

■ Notes for participants

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

→ Provide a one-minute summary of the topics covered and then prepare participants for the exercise.

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

→ Ask participants to complete the following exercises. The first one is for all participants. Analysing live data is for participants who are familiar with askia**analyse**, and have it set up on their system. The final two exercises are for users with Kodim.

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.

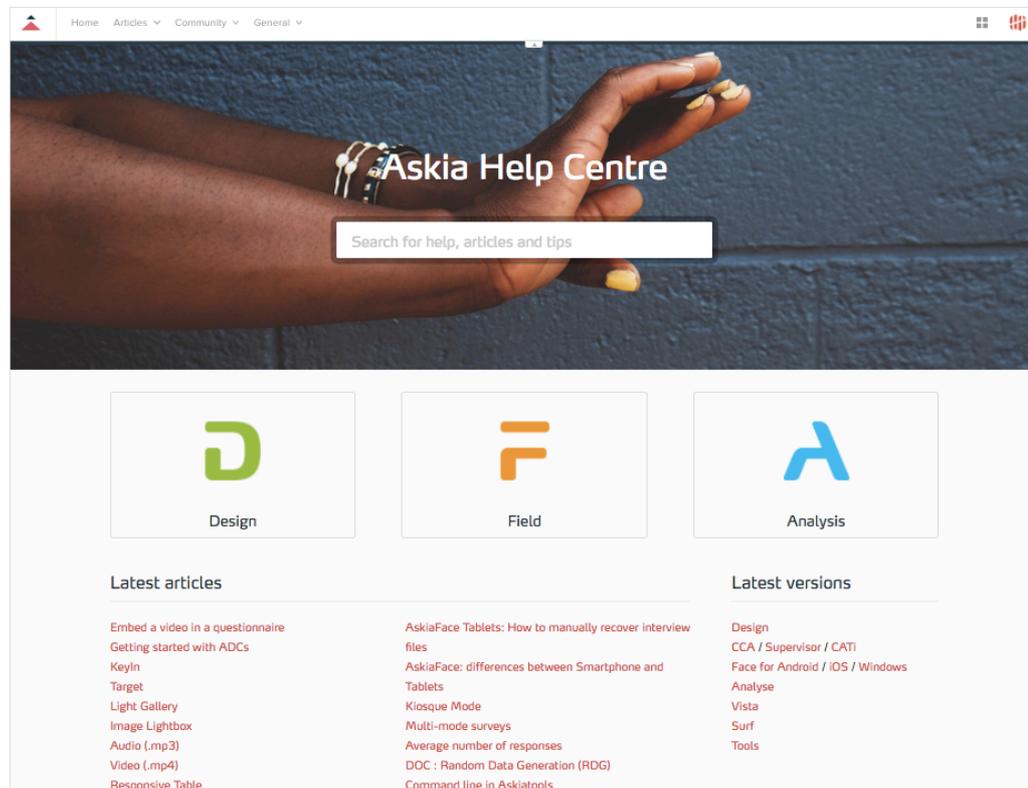
Follow these steps:

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.