

Askia Training

Course 200

Askia Analysis introductory training



Participant's Coursebook



Contents

Contents	2
Introduction	5
Format	5
Module topics	5
Session 201 Viewing tables and charts	7
Outline	7
Material covered	8
How askia works	8
Starting Askia Analyse	8
Logging in to Askia Vista	8
Opening a QES file and portfolio	9
Opening a table from a portfolio	9
Displaying the results in Askia Vista	10
Viewing the pages of a multi-page table	10
Returning to table definition	11
Printing a table or portfolio	11
Recap	12
Practical exercise	12
Viewing and printing tables	12
Session 202 Creating tables and charts	15
Outline	15
Material Covered	16
Creating a new table	16
Creating a chart	17
Finding questions in the questionnaire	17
Choosing which responses appear	19
Saving your tables to a portfolio	20
Adding grids (loop items) to a table	21
Saving your work	21
Recap	21
Practical exercises	21
Exercise 1. Creating and viewing a table	21
Exercise 2. Creating and viewing tables, adding and removing variables	22
Session 203 Refining tables	25

Outline	25
Material Covered	26
Applying templates to tables	26
Selecting which data types appear	26
Merging responses	27
Changing response labels	28
Grouping responses or creating 'nets'	28
Changing the table settings	28
Paste presentation	30
Presenting numeric questions	30
Recap	31
Practical exercises	32
Exercise 1: Amending table settings with the tab template	32
Exercise 2: Using properties	33
Session 204 Filtering, bases and weighting	35
Outline	35
Material Covered	36
Getting the base right	36
Defining filters or "Sub-populations"	36
Selecting a base or "universe"	38
Weighting	39
Recap	40
Practical exercises	42
Exercise 1: Universe and filtering (Sub-populations)	42
Exercise 2: Weighting schemes	44
Session 205 Printing and sharing reports	45
Outline	45
Material Covered	46
Printing individual tables and charts	46
Setting the table layout or style	46
Exporting tables to Word, Excel and PowerPoint	47
Exporting part of a table	48
Exporting a portfolio	49
Creating a weblink to a portfolio	49
Recap	50
Practical exercises	50
Exercise 1: Exporting tables to Word	50
Exercise 2: Exporting tables to Excel	50
Session 206 Advanced analysis: variables and data levels	53
Outline	53
Material Covered	54
Creating calculated variables	54
Combining variables	55

Working with different data levels	56
Recap	56
Practical exercises	57
Exercise 1: Creating new variables	57
Exercise 2: Switching data levels	57

Session 207 Publishing and sharing surveys with Askia Vista

59

Outline	59
Material covered	60
Signing into Askia Vista 5	60
Managing users	60
Importing a survey into Askia Vista	63
Setting the survey options	64
Updating the survey data	65
Limiting user access to data using packages	67
Limiting access filters	68
Importing weighting	69
Linking to a portfolio	70
The stages in preparing a QES file for publication	70
Recap	70
Practical exercises	72
Exercise 1: Defining a project on the Askia Vista portal	72
Exercise 2: Granting access to the survey	72

Afterword

73

Introduction

Format

This course comprises eight flexible modular sessions, which permit different learning pathways through the training course. It is primarily intended for research analysts or data processing personnel who will be defining tables, creating new variables and then possibly creating analysis portfolios or presentations for end-clients. It is also suitable for more advanced research analysts who will only be using askia vista, or a combination of analyse and vista.

Each session is intended to last no more than an hour, though it may take longer, if additional time is required to complete the practical work.

Each session follows the same format:

1. Introduction (by tutor) 2-3 minutes
2. Tutorial and demonstration 15-20 minutes
3. Summary (by tutor) 2 minutes
4. Practical exercises variable
5. Recap, feedback and questions

Module topics

Core modules

- Session 201 Viewing tables and charts
- Session 202 Creating tables and charts
- Session 203 Refining tables and charts
- Session 204 Filtering, weighting and bases
- Session 205 Printing and sharing reports

Optional modules

- Session 206 Advanced analysis: variables and data levels
- Session 207 Producing high-quality presentations
- Session 208 Publishing and sharing surveys with Askia Vista



Analyse only



Vista only

Example learning pathways

Sessions 201 to 205 should be followed in sequence. However, beyond this, each optional session exists as a standalone module, and these can be followed in any order.

We suggest these three configurations:

Basic introduction to Analysis 

Basic Analysis plus conversion to Vista  

Complete Analysis without Vista 

Further Training

Other training courses which may be relevant to participants taking this course, include:

Course 150	Introduction to Askia Script
Course 300	Introduction to Askia Field
Course 400	Introduction to Askia Tools
Course 410	Editing data with Askia Script and Askia Tools

Session 201 **Viewing tables and charts**

Outline

Topics presented

In this session, we will introduce you to:

- Analysis within the Askia suite
- The Askia QES file
- Tables defined in Askia
- Portfolios of pre-defined tables
- Options for viewing and printing tables

Learning outcomes

At the end of this session you will understand:

- the different roles of the two analysis modules in the Askia software suite
- the purpose and function of the QES file in analysis
- the role of the portfolio

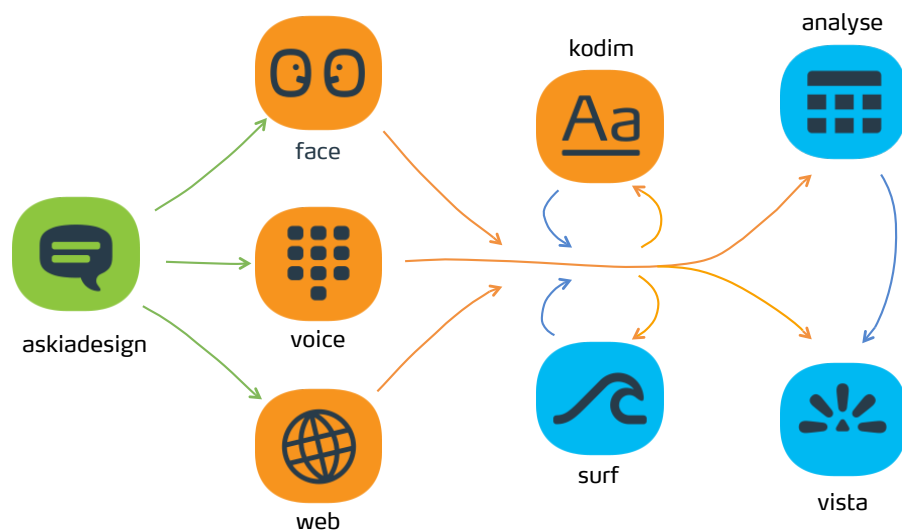
And you will be able to:

- Open a QES file and portfolio
- Open a table from a portfolio
- View the pages of a multi-page table
- Return to table definition
- Print a table or portfolio

Material covered

How askia works

The modules of the software



Starting Askia Analyse



To start Askia Analyse, double-click the icon on your desktop. Alternatively, you can open the start menu, click **all programs**, open the **askia** program group, and click **Analyse**.

Logging in to Askia Vista

To log in to Askia Vista:

1. Open a supported web browser (Internet Explorer 9 onwards, or a recent version of Chrome, Firefox, Opera or Safari).
2. Navigate to the URL provided to you by your system administrator.
3. On the log-in screen, enter your user name and password:

The screenshot shows a login interface with a dark background. It features two input fields: 'User name' and 'Password'. Below these fields is a blue button labeled 'Sign in'.

4. Click **OK**.

Opening a QES file and portfolio

The methods for opening QES files and portfolios are slightly different in Askia Analyse and Askia Vista.

Askia Analyse

To open a QES file in Askia Analyse:

1. In the **file** menu, click **open**.
2. Select the QES file.

To open a portfolio in Askia Analyse:

1. Ensure you have a QES file open.
2. In the **file** menu, click **open a portfolio....**
3. Select the portfolio file.

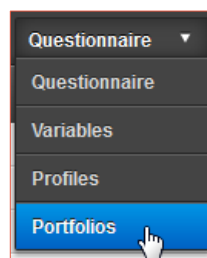
Askia Vista

To open a QES file in Askia Vista:

1. At the top of the screen, click **open**.
2. In the list of available QES files, select the one you wish to open.
3. Click **open**.

To open a portfolio in Askia Vista:

1. In the left-hand pane, in the drop-down list, select **portfolios**:



2. In the left-hand pane, click the portfolio you want to open; its items are displayed.

Opening a table from a portfolio

Askia Analyse

To open a table from a portfolio in Askia Analyse:

1. If you want to view the tables inside a chapter, double-click the chapter to open it.
2. Double click the table you want to open. The table opens in table definition mode, in the right-hand pane.

3. At the bottom of the screen, click the **results** tab.

Askia Vista

To open a table from a portfolio in Askia Vista:

1. In the left-hand pane, in the drop-down list, select **portfolios**.
2. Click the appropriate portfolio in the left-hand pane; its contents (portfolio items) are displayed.
3. Click the portfolio item you want to open.
4. At the top of the left-hand pane, click **run portfolio item**.
5. The portfolio item's tables and/or charts are displayed in the table/chart results area, reflecting the current data.

Displaying the results in Askia Vista

Askia Vista

In Askia Vista, the results are shown automatically in the bottom centre of the screen. However, instead of the tables or charts, you may see the following icon:



This means that the display of results has been paused. You can display the results simply by clicking the icon. When you make changes to the analysis, you will need to click the icon again to view the updated results.

You can set Askia Vista to always display the table contents automatically, removing the need to click to update the results.

To make Askia Vista update your results automatically:

1. At the top right of the screen, click your user name, and then click **preferences**.
2. Select the option **auto-play results**.
3. Click **save**.

Note that for complex analyses, it can take time for Askia Vista to update the results. In this situation, you may wish to disable automatic updates in order to enjoy a more responsive experience.

Viewing the pages of a multi-page table

Askia Analyse

If a table has multiple pages, they are shown in the right-hand pane when you click the **results** tab.

To view multi-page tables:

1. Double-click a page to view it.

2. Move between pages by right-clicking, and selecting **next tab** or **previous tab**.
3. To return to the list of page, right-click and select **go back to tab list**

Askia Vista

If a table has multiple pages, navigation buttons are shown above the table:



Use **back** and **next** to step through the pages, or click a page number to go directly to that page.

You can also call up the table of contents, by clicking **show/hide the table of contents**:



Click on any page in the table of contents to display that page.

Returning to table definition

Askia Analyse

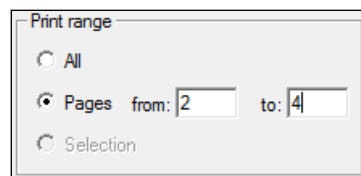
In Askia Analyse, to return to the table definition when viewing results, simply click the **definition** tab at the bottom of the screen.

Printing a table or portfolio

Askia Analyse

To print a table:

1. Display the table, or its list of pages.
2. In the **file** menu, click **print** (alternatively, click **print** in the toolbar).
3. If this is a multi-page table, you can specify which pages to print in the print dialog:



To print a portfolio:

1. Ensure the portfolio is visible (in the **window** menu, click **cascade** or **tile**, then click the portfolio window to make it active).
2. In the **file** menu, click **print** (alternatively, click **print** in the toolbar).



Askia Vista

To print a table:

1. Define the table as required.
2. Above the table, click **print**.

Note: The above procedure prints only the current page.

Recap

In this session on viewing tables and charts, we have:

- Started Askia Analyse and/or logged into Askia Vista
- Viewed pre-defined tables presented in a portfolio
- Navigated through multi-page tables
- Seen the options for printing all tables or selected tables

Practical exercise

Viewing and printing tables

For this exercise, your tutor will provide you with an example QES and portfolio. There are two versions of the exercise; one for Askia Analyse and one for Askia Vista. Please do one or both exercises as instructed by your tutor.



Askia Analyse

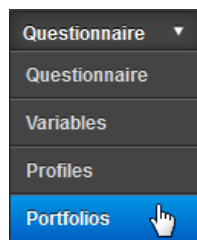
1. Start Askia Analyse.
2. In the file menu, select **open...**, and select the example QES file provided by your tutor.
3. Open the file menu, select open a **portfolio...**, and select the example portfolio provided.
4. Browse the portfolio, and double-click tables within it to open them (click the **results** tab at the bottom of the window to view the table itself).
5. Choose a table that you want to print. While viewing this table, open the **file** menu, and select **print...**
6. If a printer is available in this training session, you can select it and carry out the print operation; otherwise, click **cancel** in the print dialog.



Askia Vista

1. Log in to Askia Vista.
2. At the top of the screen, select **open...**, and select the example QES file provided by your tutor. Click **open** to load this QES.

3. At the top of the left-hand pane, open the drop-down menu and select **portfolios**:



4. In the left-hand pane, open the example portfolio.
5. Browse the portfolio, and run a few of its tables. To run a table, select the table and then click **run portfolio item** at the top of the left-hand pane.
6. Choose a table that you want to print. Above the table, click **print**.
7. If a printer is available in this training session, you can select it and carry out the print operation; otherwise, click **cancel** in the print dialog.

Session 202 **Creating tables and charts**

Outline

Topics

In this session, you will learn how to:

- Create a new table
- Create a new chart (Askia Vista)
- Find questions in the questionnaire
- Choose which responses appear in the table
- Control which variables appear in the table
- Add grids (loop items) to a table
- Add tables to a portfolio

Learning outcomes

At the end of this session, you will be able to:

- Create tables by selecting variables and applying tabulation options
- Create and view analyses in chart form (in Askia Vista)
- Produce tables from grid questions
- Apply options to fine-tune the appearance of your tables and (for Askia Vista) charts

Material Covered

Creating a new table



Askia Analyse

To create a new table:



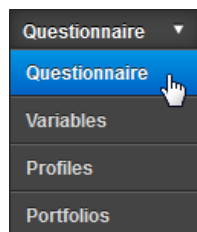
1. In the toolbar, click **new**. This creates a new empty table.
2. In the left-hand pane, ensure you can see the question list. If not, click the **questionnaire** tab.
3. To open chapters in the questionnaire, double-click them (or use the +/- icons to open and close them).
4. To place a variable in the rows or columns of the table, drag and drop them from the questionnaire tab, in the left-hand pane, into the **rows** or **columns** tab in the right-hand pane.
5. To view the table, click **results**.



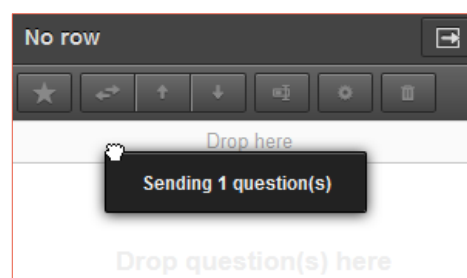
Askia Vista

To create a new table:

1. At the top of the screen, click **new**.
2. In the left-hand pane, ensure you can see the question list. If not, select **questionnaire** from the drop-down list at the top of the left-hand pane:



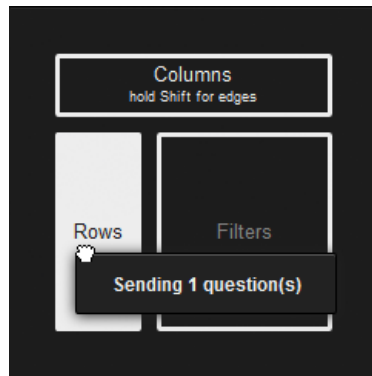
3. To open a chapter in the questionnaire, click **expand** next to it:
▶
4. To place a variable in the rows or columns of the table, drag and drop them from the questionnaire tab, in the left-hand pane, into the **rows** or **columns** tab in the upper centre pane:



The table contents update automatically to reflect your changes.

Note: you can also drag and drop questions directly onto the table view. When you move the question over the table view, a diagram of the table's

areas appears. Simply drop the question on the area of the table where you want it to appear:



Creating a chart

Askia Vista

To create a chart, you use the same procedure as creating a table. You simply select a chart type in the properties panel, and the chart is displayed when you click **results**.

To create a new chart:

1. When defining the table, open the **general** category of the properties panel.
2. In **chart**, select the chart type you wish to display.
3. Click **results** to view the table. Then, to view the chart, click its title in the left-hand pane. The table/chart results update automatically to reflect your changes.

Finding questions in the questionnaire

If you have a complex project, it can be time-consuming to find the questions you want to tabulate. However, you can perform a search to find the items you want to add to your table. In Askia Vista, you can search for text in the question name. In Askia Analyse, you can search your questionnaire for any text that can be associated with the question, including the question shortcut, and response texts.

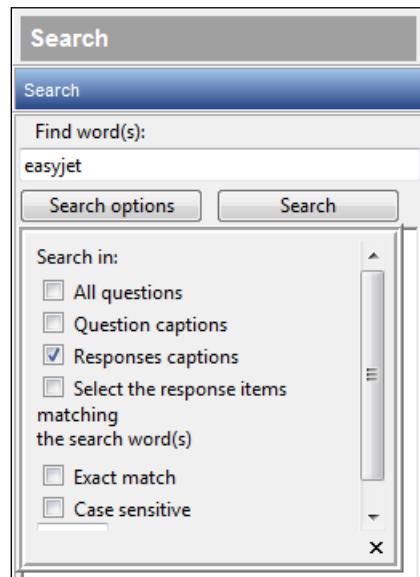
Once you have found the questions you are interested in adding to your table, you can drag and drop them directly from the search results into the table's rows and columns.

Askia Analyse

To find questions in a project:

1. In the left-hand pane, click the **search** tab.
2. In the **find** box, type the text you are looking for.

3. Select the items you want to search in (for example, to search within response texts, ensure **responses** is selected). Note that in Askia Vista, you first need to click **search options** in order to reveal these options.



4. Click **search**.
5. To add an item to your table, you can simple drag and drop it from the search results into the table's rows or columns.
6. To return to the questionnaire tree view, in the left-hand pane click the **questionnaire** tab.

It is possible to quickly locate a question in the tree view if you have it in your table's rows or columns.

To locate a question in the tree view:

1. In the rows or columns tab, right-click a question or response.
2. Select **locate**. The *questionnaire* tab is activated, and the question is highlighted.

Askia Vista

To find questions in a project:

1. At the top of the left-hand pane, click **search questionnaire**:



2. In the **search** box, type the text you are looking for. Items containing this text are displayed automatically.
3. To add an item to your table, you can simple drag and drop it from the search results into the table's rows or columns.
4. To view the entire questionnaire tree again, in the left-hand pane click **search questionnaire** again.

Choosing which responses appear

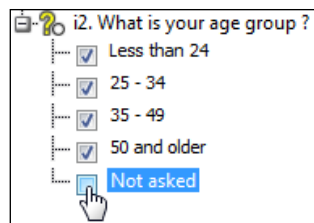


Askia Analyse

You can control which responses in a question appear in your tables.

To select the responses which appear in a table:

1. If you are not in table definition mode, click the **definition** tab at the bottom of the screen.
2. In the **rows** or **columns** tab, find the question whose responses you want to change.
3. If the responses are hidden, reveal them by clicking **+** next to the question.
4. Ensure the responses you want to appear in the table are selected, and the others are de-selected:



5. Click **results** tab to view the table.



Askia Vista

To select the responses which appear in a table:

1. In the **rows** or **columns** tab, find the question whose responses you want to change.
2. If the responses are hidden, reveal them by clicking **▶** next to the question.
3. Click the response or responses that you don't want to appear in the table (to select more than one response, hold down CTRL as you click, or SHIFT to select a block of adjacent responses).
4. Click **hide selected response(s)**:



Your tables/charts are updated automatically to reflect your changes.

Some time-saving short cuts

You can use a variety of short-cuts to more quickly select and de-selecting items from a list. You can:

- move up and down in the list by using the arrow keys;
- select or de-select an item by tapping the space bar (Analyse only);
- use CTRL+click to select more than one list item;
- use SHIFT+click to select a series of adjacent items.

Saving your tables to a portfolio

When you want to save tables you have created, you store them in a **portfolio**. A portfolio can contain one or many tables (and also charts, in Askia Vista).

The portfolio contains the definition of each table or chart, rather than a “snapshot” taken at the time you created it; this means that tables and charts are always recalculated from the current data, every time you open them.

The procedure for saving to a portfolio is different in Askia Analyse and Askia Vista.



Askia Analyse

To save a table to a portfolio:

1. Create a table.
2. In the toolbar, click **send to portfolio**. If you already have a portfolio open, the table is placed there; otherwise, a new portfolio is created.
3. Type a name for the table. You can change this later by clicking the name and typing.
4. To save the portfolio, click the toolbar **save** icon, or in the **file** menu, click **save**.




Askia Vista

To save a table to an existing portfolio:

1. Create one or more tables or charts.
2. Above the table/chart view, click **save to portfolio**. A dialog appears allowing you to choose where to save the tables/charts.
3. In the **where** drop-down list, select the existing portfolio you want to save to.
4. In **name**, type a name for your tables/charts.
5. Click **save**.

To save a table to a new portfolio:

1. Create one or more tables or charts.
2. Above the table/chart view, click **save to portfolio**. A dialog appears allowing you to choose where to save the tables/charts.
3. Click **new**:

4. In **save in**, type a name for the new portfolio.
5. In **name**, type a descriptive name for your tables/charts.
6. Click **save**.



Saving your work. You should save your work frequently. In Askia Analyse, portfolio files are best saved into the same folder as the QES file. However, you can copy a portfolio from one job to another.

If the two jobs contain the same question names, then the portfolio may be used to create the same tables from another project, or as a starting point for creating more tables.

Adding grids (loop items) to a table

Adding a grid (loop item) to a table is slightly different than for other questions. The procedure is basically the same, but you need to add the first item (the *loop question*) in order to include all of the loop items in the table.

If you add any other loop item, only that item will appear in the table.

Saving your work

Recap

In this session on creating tables and charts, we have:

- Used the search box to locate and identify different questions in the questionnaire for analysis
- Defined several tables from scratch
- Defined different charts from scratch (in Askia Vista)
- Customised tables and charts by adding and removing variables
- Tailored your analysis by hiding certain responses
- Produced a table from repeated questions that occur inside a loop
- Added tables to a portfolio
- Saved our work

Practical exercises

Exercise 1. Creating and viewing a table



Askia Analyse

1. In the toolbar, click **new**; this creates a new, blank table definition.
2. Choose a question to add to the rows of your table, and drag it to the **rows** tab.
3. Choose a question to add to the columns of your table, and drag it to the **columns** tab.

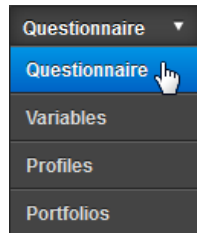
4. At the bottom of the window, click the **results** tab to view the table.

If the output spans multiple pages, double-click a page to view it.

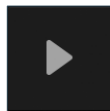


Askia Vista

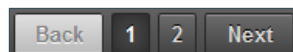
1. At the top of the screen, click **new**; this creates a new, blank table definition.
2. In the drop-down list at the top of the left-hand pane, ensure **questionnaire** is selected:



3. Choose a question to add to the rows of your table, and drag it to the **rows** tab.
4. Choose a question to add to the columns of your table, and drag it to the **columns** tab.
5. At the bottom centre of the screen, you should see the table results. If you see the following icon, click it to display the results:



If the output spans multiple pages, click the page buttons above the table to view the various pages:



Exercise 2. Creating and viewing tables, adding and removing variables



Askia Analyse

1. In the toolbar, click **new** to create a new table definition.
2. Choose a question to add to the rows of your table, and drag it to the **rows** tab.
3. Choose a question to add to the columns of your table, and drag it to the **columns** tab.
4. In the right-hand pane, if the **general** tab is not open, click it.
5. At the bottom of the window, click the **results** tab to view the tables and charts.

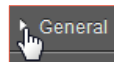
If the output spans multiple pages, double-click a page to view it.

6. At the bottom of the window, click the **definition** tab to return to table definition.
7. Drag another variable into the **columns** tab.
8. Click the **results** tab to view the tables and charts.
9. At the bottom of the window, click the **definition** tab to return to table definition.
10. Open the columns tab, right-click the first variable you placed there, and select **remove**.
11. Click the **results** tab to view the tables and charts.
12. Askia Analyse users should now click **add to portfolio** in the toolbar.
13. Type a name for the table.
14. In the toolbar, click **save**, and save the portfolio in an appropriate location (e.g. the same folder as the QES file).



Askia Vista

1. At the top of the screen, click **new** to create a blank table definition.
2. Choose a question to add to the rows of your table, and drag it to the **rows** tab.
3. Choose a question to add to the columns of your table, and drag it to the **columns** tab.
4. In the properties panel, if the **general** group is not open, click the expand icon to open it:



5. In the **chart** drop-down list, select a chart type.
6. At the bottom centre of the screen, you should see the table results. If you see the following icon, click it to display the results:



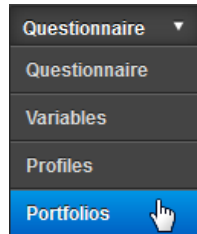
If the output spans multiple pages, click the page buttons above the table to view the various pages.

7. Drag another variable into the **columns** tab.
8. At the bottom centre of the screen, you should see the new table results. If you see the play icon, click it to display the results.
9. In the **columns** panel, select the first variable you placed there, and then click **remove selection(s)**:



10. At the bottom centre of the screen, you should see the updated table results. If you see the play icon, click it to display the new results.

11. Above the table results, click **save to portfolio**.
12. In the dialog that appears, click **create a new portfolio container**. In **save in**, type a name for the new portfolio, and in **name**, a name for your tables. Finally, click **save**.
13. At the top of the left-hand pane, open the drop-down menu and select **portfolios**:



14. Locate your new portfolio in the list, open it, select the analysis you just saved and click **run portfolio item** at the top of the left-hand pane.

Session 203 **Refining tables**

Outline

Topics

In this session, we will introduce you to a range of options in Askia that allow you to customise and fine-tune the presentation of your tables and charts. You will learn cover:

- Templates to apply to tables and (Askia Vista only) charts
- Data types used in analysis
- Statistics and significance
- Changing response labels
- Merging response categories

Learning outcomes

After this session, you will be able to:

- Vary the appearance of your tables and (in Askia Vista) charts
- Vary the percentage options, values and statistics presented in your tables
- Alter the text labels presented in your tables and charts
- Tailor the responses you are presenting by merging or combining response options

Material Covered

Applying templates to tables

The **tab template** is used to store calculation types and properties, and any changes you make to the table settings. You can easily apply an existing tab template to your table.

Askia Analyse

To apply a template to a table:

1. In table definition, open the **general** tab.
2. In the **tab template** list, select the template you want to apply. When you view the results, the calculation types and settings in the tab template will be applied to your table.

Askia Vista

To apply a template to a table:

1. At the top of the properties panel, open the **template** list.
2. In the **template** list, select the template you want to apply. When you view the results, the calculation types and settings in the tab template will be applied to your table.

Selecting which data types appear

It is easy to select which data types will appear in your table. For example, you can choose to display values, percentages, and various statistical analyses.

Askia Analyse

To select which data types appear in your table:

1. In table definition, open the **general** tab.
2. In the list of data types, check the ones you wish to appear:

Name	Conditional form...	Use for charts	Custom setting
<input checked="" type="checkbox"/> n	No	No	
<input checked="" type="checkbox"/> %	Yes	No	
<input checked="" type="checkbox"/> M	No	No	
<input checked="" type="checkbox"/> sd	No	No	
<input checked="" type="checkbox"/> nb	No	No	

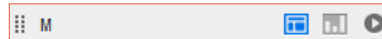
3. Click **results** to view the table.



Askia Vista

To select which data types appear in your table:

1. In the properties panel, ensure the **calculations** group is open.
2. For each calculation, there are two icons which indicate whether it will be included in your tables or charts. When selected, they are highlighted in blue. For example, the following calculation is included in tables, but not charts:



To include the calculation in your tables, ensure **use the calculation for tables** is highlighted; to include it in your charts, ensure **use the calculation for charts** is highlighted.

Merging responses

It is possible to merge two or more responses. For example, you might want to combine categories in a rating question.



Askia Analyse

To merge two or more responses:

1. Open the **rows** or **columns** tab, and locate the responses you want to merge.
2. Select the responses you want to merge. To do so, hold down **CTRL** and click each response, or hold down **SHIFT** to select a block of adjacent responses.
3. Right-click and select **group**. Then...

Click **group and show details** (to show the individual responses as well) or **group and hide** (to hide the individual responses in the results).

4. You can now set the labels of the new merged categories. Click the categories and type the new labels.
5. Select any of the individual responses that you wish to appear (and de-select those you don't want to appear).
6. Click **results** to view the table.



Askia Vista

To merge two or more responses:

1. In the **rows** or **columns** panel, locate the responses you want to merge.
2. Select the responses you want to merge. To do so, hold down **CTRL** and click each response, or hold down **SHIFT** to select a block of adjacent responses.

3. In the toolbar, click **more** (the gear icon), then the grouping command of your choice:
 - **Group responses:** hide the individual responses in the results; show only the new group.
 - **Group with details:** show the individual responses in your results as well as the new group;
4. To set the label of the new group, simply type the new label and then press ENTER or click **save**.

Changing response labels

You can also edit the text of any response labels that appear in your table.



Askia Analyze

To change the response labels:

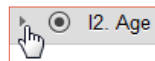
1. Open the **rows** or **columns** tab, and locate the response label you want to change.
2. Click the response label, and type the new text.
3. Click **results** to view the table.



Askia Vista

To change the response labels:

1. In the **rows** or **columns** panel, expand the appropriate question, so that its responses are visible:



2. Click the response label you want to change.
3. In the toolbar, click **rename the selected item**:



4. Type the new label. Press ENTER, or click **save** to apply your new label.

Grouping responses or creating 'nets'

Creating a *top-2 box*

Changing the table settings

It is easy to change the table settings. For example, with a few mouse clicks you can apply or remove column significance.

Askia Analyze

To apply column significantivity:

1. In the **general** tab, click **settings....** The *settings* dialog appears.
2. In the **total and caption** tab...

In Askia Analyze, select **show column order letter (for col significantivity)** to show significance letters, or clear this option to hide them.

In Askia Vista, select **show column order letter (for significance)** to show significance letters, or clear this option to hide them.

3. Click **OK**. When you next view the table results, your change will be applied.

Other table settings can be changed in a similar manner.

Askia Vista

To apply column significance:

1. In the **properties** panel, open the **calculations** category:

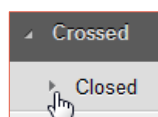


2. At the top of the **calculations** category, click **add**:

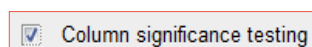


The *add calculations* dialog appears.

3. In the crossed category, open the **closed** sub-category:

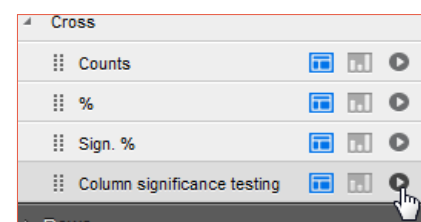


4. Select **column significance testing**:



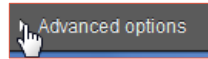
5. Click **add**.

6. In the **calculations** category of the **properties** panel, locate the *column significance testing* calculation you just added, and click **display calculation properties**:



The calculation properties open.

7. In the calculation properties, open the **advanced options** category:



8. Select the desired options for significance letters:



For example, to show letters for high significance, select **display A+**.

9. At the top of the properties panel, click **return to the main properties**:



Other table settings can be changed in a similar manner.

Paste presentation

It is possible to copy the presentation options from one question to another.

Askia Analyze

To copy the presentation options between questions:

1. Select the first question (the question whose settings you want to apply to the second question).
2. Select **copy**. The copy command can be found in the context (right-click) menu, the toolbar and the **edit** menu.
3. Right-click the second question and select **paste presentation**.

Askia Vista

To copy the presentation options between questions:

1. Select the first question (the question whose settings you want to apply to the second question).
2. In the toolbar, click **more** (the gear icon), then **copy**.
3. Select the second question.
4. In the toolbar, click **more**, then **paste presentation**.

Presenting numeric questions

Askia Analyze

When you have a numeric question in an Askia Analyze table, you can present the information in a variety of ways.

Note: it is not possible to manipulate numeric variables in Askia Vista, but you can prepare a calculated numeric variable in Askia Analyze and import that into Askia Vista. Calculated variables are discussed in Creating calculated

variables on page 54. Importing projects into Askia Vista is covered in optional session 207.

Numeric data can be split into numeric **intervals**. For example, you might want to break up a numeric age question into age groups, each interval being the series of value in a particular age range (e.g. 18-24).

It is possible to automatically create the intervals (numeric ranges) that will be presented in your table.

To automatically calculate the intervals that are shown:

1. In the **rows** or **columns** tab, right-click the question.
2. In the context menu, select **numeric**, then **find all values** (or find X values, to split the numeric data into a specific number of intervals).
3. You can then combine intervals into groups if you want, much as you group closed responses. To do so, select the intervals you want to group, right-click them and select **group**, then **group and hide**. Finally, enter a name for the new interval group (e.g. 1-4).

Intervals in numeric questions

It is also possible to specify exactly which numeric **intervals** are included in the rows or columns of your table.

To specify the intervals that are shown:

1. In the **rows** or **columns** tab, right-click the question.
2. In the context menu, select **numeric**, then **insert interval**.
3. To specify a single value, select value, then, in **from**, enter the value.
4. To specify a range of values, select interval, then in **from** and **to**, enter the low and high values in the range.
5. Click **OK**.

Recap

In this session, you have learned how to:

- Vary the presentation of your tables and charts through applying templates
- Adjust the options for presenting totals, percentage and other statistics
- Select and apply statistical significance to tables
- Edit the response labels for presentation
- Combine categories in questions
- Create groups or nets

Practical exercises

Exercise 1: Amending table settings with the tab template



Askia Analyze

1. In the toolbar, click **new** to create a new table definition.
2. Add a scale question, if available, to the rows of your table. If a scale question is not available, choose a single or multi-coded question.
3. Add a demographic question to the columns of the table.
4. In the list of data types, select **mean**:

5. Open the **rows** tab, and expand the question.
6. Simplify the response list by grouping them together appropriately. To do so, select two or more responses, right-click and select **group and hide**. Then type a label for the new category. For example:

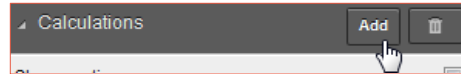
7. Click **results** to view your table.
8. Now, let's change the tab template. Return to the **definition** tab. In the **general** tab, open the **tab template** list, and select a different template (e.g. **Askia Crossed**). Click **results** to view the table with the new template applied.
9. Now create a new profile, find a numeric question in your survey, and add it to the rows.
10. In the **rows** tab, right-click the question, and select numeric, then **find all values**.
11. Now group the into ranges items (using **group and hide**, as you did earlier in this exercise). Finally, click **results** to view the table.



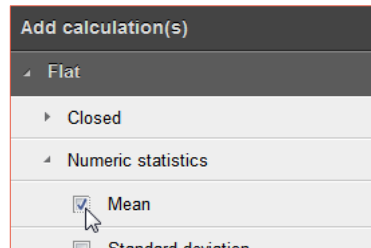
Askia Vista

1. At the top of the screen, click **new** to create a new table definition.

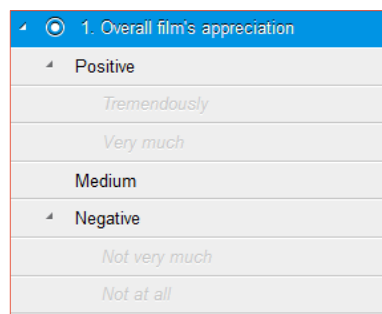
2. Add a scale question, if available, to the rows of your table. If a scale question is not available, choose a single or multi-coded question.
3. Add a demographic question to the columns of the table.
4. Let's add a **mean** calculation to your table. To add a new calculation, in the properties panel, in the responses category click **add**:



5. In the dialog that appears, open **flat**, then **numeric statistics**, and select **mean**:



6. In the **rows** panel, expand the question.
7. Simplify the response list by grouping them together appropriately. To do so, select two or more responses, then in the toolbar click more (the gear icon), and then **group and leave**. Then type a label for the new category. For example:



8. Now, let's change the tab template. Return to the **definition** tab. In the **general** tab, open the **template** list, and select a different template. Look at the table with the new template applied.

Exercise 2: Using properties

Askia Analyze

We are now going to show you something new in this exercise.

1. Set up a table using a rating scale question. The tutor will suggest which question you should use.
2. Create a group of responses for "any positive" or "all agree". To do so, select the responses, right-click and select **group and hide**. Then type an appropriate label.
3. Now we will apply font formatting to the new category you have created. Right-click the category and select **properties**. In the *response properties* dialog that appears, set the font to **bold** (the bold button is near the bottom of the dialog).

4. Add one or more rating scale questions to the rows, below your original question; again, your tutor will suggest which to use. Remember that you can shift-click several questions to select them at the same time; this allows you to drag and drop multiple questions at once.
5. Click **results** to view the table.
6. Now, we will apply the formatting and grouping from your original question to the ones. Right-click the question you have already grouped and formatted, and select **copy**.
7. Select the other questions in the table (you can shift-click again to select multiple items).
8. Right-click and select **paste presentation**. The grouping and formatting from your first question are applied to the others.
9. Click **results** to view the table.



Askia Vista

We are now going to show you something new in this exercise.

1. Set up a table using a rating scale question. The tutor will suggest which question you should use.
2. Create a group of responses for “any positive” or “all agree”. To do so, select the responses, then in the toolbar click **more** and then **group responses**. Then type an appropriate label.
3. Now we will apply font formatting to the new category you have created. Select the category. Then, in the properties panel, open the group headed **1 response(s) selected**. Set the font to **bold** by clicking the B button (the bold button is near the bottom of the group).
4. Add one or more rating scale questions to the rows, below your original question; again, your tutor will suggest which to use. Remember that you can hold down CTRL or SHIFT to select several questions to select them at the same time; this allows you to drag and drop multiple questions at once.
5. View the table.
6. Now, we will apply the formatting and grouping from your original question to the ones. Click the question you have already grouped and, in the toolbar, click **more** (the gear icon), then **copy**.
7. Select the other questions in the table (you can shift-click again to select multiple items).
8. Click **more** and then **paste presentation**. The grouping and formatting from your first question are applied to the others.
9. View the table.

Session 204 **Filtering, bases and weighting**

Outline

Topics

In this session, we will focus on ways to ensure that the analyses you produce are accurate and faithful to the study's defined sample base. We will introduce you to these features of Askia Analyse (and Askia Vista):

- Sub-populations
- The Universe
- Weighting
- Defining weight targets

Learning outcomes

At the end of this session you will be able to:

- Define filters and restrict the base on some tables or charts to specific sub-groups
- Set an appropriate percentaging base for your tables and charts
- Apply weighting schemes to correct for sampling error, either pre-defined weights or by creating your own weighting scheme based on targets

Material Covered

Getting the base right

Askia provides you with two related controls to affect who appears in a table:

1. **Sub-population** (Askia Analyse) or **filter** (Askia Vista 6) allows you to define a filter or logical condition which includes some respondents and excludes others (e.g. mobile phone users with a 'postpay' contract in a study of mobile phone users).

For each individual, that condition is either *true* or *false*. When applied, the sub-population or filter excludes everyone for whom the condition is not true. The total shown (usually at the top of the table) is the sum of number of times the condition was true.

2. **Universe** allows you to define how the base will be calculated – what total will be used when calculating percentages. You can also explain that the universe is effectively the denominator in the calculation (i.e. the number into which the values are divided to create the percentage).



It is always a good idea to include the total row in your tables, so that you can easily see the effects of any filters and bases that are applied.

Defining filters or "Sub-populations"

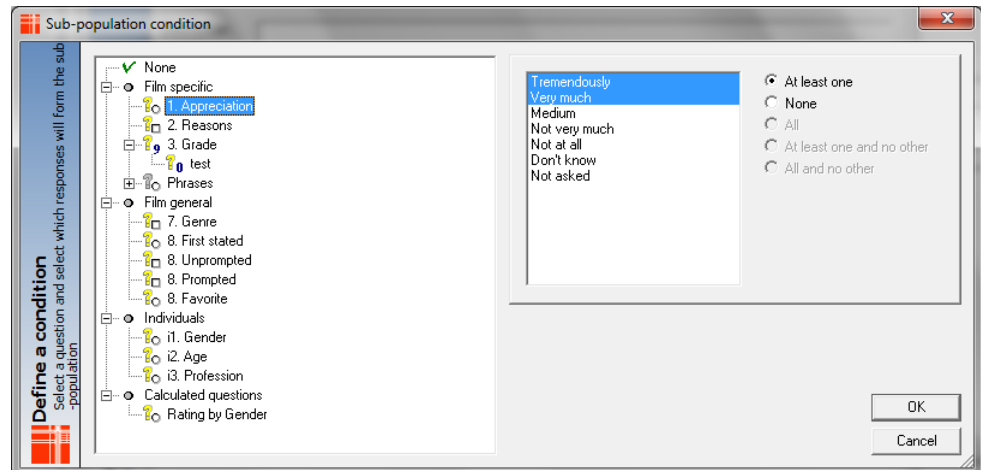


Askia Analyse

To define a custom base or filter:

1. In table definition, open the **general** tab.
2. Click  next to the *universe* list (for bases) or *sub-population* list (for filters). A filter/base definition dialog appears.
3. Click , and then enter a name for your new base or filter.
4. Enter a description of the base or filter, that will help identify it in future.
5. Select **by GUI**.
6. To define a condition of the base or filter, click ... next to it. A dialog appears, allowing you to select the appropriate questions and responses.

Select the question you want to use in the condition:



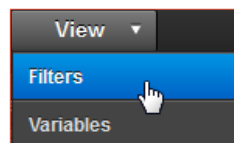
You can also simply drag the relevant question into the condition.

7. Select the response or responses (to select more than one, hold down **CTRL** and click each one), and the appropriate operator (**at least one**, **none**, etc.). For example, if you want to specify one or more selections from the first three responses, you would select them all, and select **at least one**.
8. Click **OK**. Your condition appears in the base/filter definition window.
9. For each subsequent condition, repeat steps 6-8. You can determine whether both conditions need to be true by selecting **AND** or only one of them needs to be true, by selecting **OR**, between the two conditions.
10. Click **OK** to create your base or filter.

Askia Vista

To define a custom filter:

1. At the top of the screen, in the **view** list click **filters**:

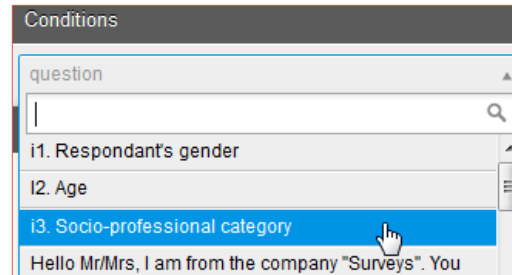



2. At the top of the right-hand pane, click **create a new filter**:



3. In **caption**, enter a name for your new filter.
4. In **description**, type a description of the filter that will help identify it in future.
5. By default, **assisted** mode is selected; we will leave Vista in this mode for the purposes of this procedure.

6. In the drop-down list, select the question you want to use in the condition:



7. In a moment, you are going to specify a list of responses from the question, but first, in the comparator list, select the comparison operator you want to use (**at least one**, **none**, etc.). This will determine which responses from your list must be answered to satisfy the filter. For example, if you want your filter to be satisfied if the respondent answers any responses from a specific list, you would select **at least one**. If you want the respondent to have selected none of the responses from the list, you would select **none**.
8. Click **responses**, and select the first response in your list.
9. Repeat step 8 for each further response in your list.
10. To add a further condition, click **+** on the row beneath the condition, and repeat steps 6-9 to define it. There are two buttons between the conditions that determine how they interact. You can specify that both conditions need to be true by selecting **AND**; to specify that only one of them needs to be true, select **OR**.
11. In the toolbar, click **save the current filter**:

12. To close the filter definition view, and reveal the rest of the screen, in the top right-hand corner of the screen click **close**.

Askia Analyze

To select a pre-defined filter:

1. In table definition, open the **general** tab.
2. In **sub-population**, select the filter you require.

Askia Vista

To select a pre-defined filter:

1. In the properties panel, open the **general** category.
2. In **filter**, select the filter you require.

Selecting a base or "universe"

Askia allows you to define one or more 'automatic' bases. When applied these affect the total number of respondents or cases shown in the table, and will therefore affect the percentaging.

These are

- All respondents (in Analyse) or all interviews (in Vista) – all cases in the answer dataset
- Question base – those asked the question
- Answer base – those who were asked and gave an answer to the question

Askia Analyse

To select a pre-defined base:

1. In table definition, open the **general** tab.
2. In **universe**, select the base you require.

Askia Vista

To select a pre-defined base:

1. In the properties panel, open the **general** category.
2. In **universe**, select the base you require.

Weighting

Applying a pre-defined weighting scheme

Askia Analyse

To select a pre-defined weighting:

1. In table definition, open the **general** tab.
2. In **weighting**, select the weighting you require.

Askia Vista

To select a pre-defined weighting:

1. In the properties panel, open the **general** category.
2. In **weighting**, select the weighting you require.

Defining a custom weighting scheme

Askia Analyse

Note that this section applies to Askia Analyse only.



To define custom weighting:

1. In table definition, open the **general** tab.
2. If you want to base your new weighting on an existing one, select that existing weighting from the **weighting** list.
3. Click ☐ next to the *weighting* list. The *weighting* dialog appears.
4. If this is a brand new weighting, click ☐, and then enter a name for your new weighting.
5. If you are modifying an existing weighting, amend the name.
6. Enter a description of the weighting, that will help identify it in future.
7. In **level**, choose a data level on which the weighting operates. Data levels are covered in optional session 206 on page 56.
8. Click the pie chart icon:



The *select question* dialog appears.

9. Select the question on which you want to base the weighting.
10. In the **target** column of the matrix, enter the target for each response:

	Observed		Target	
Man	137	43.91%	49	49.00%
Woman	141	45.19%	51	51.00%

Note that the values themselves are not important, but rather the proportions between the values. The percentages are adjusted accordingly as you enter the target values.

11. Click **save**:



12. Click **OK** to create the weighting.

Recap

In this session, you have learned how to:

- Set an appropriate base for your tables and charts by defining the universe
- Define and apply sub-populations in order to reduce the percentage base on some tables or charts
- Select and apply pre-defined weights to your analyses

- Define your own weighting based on targets

Practical exercises

Exercise 1: Universe and filtering (Sub-populations)

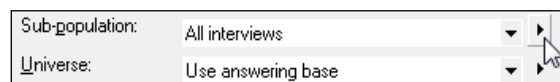


Askia Analyze

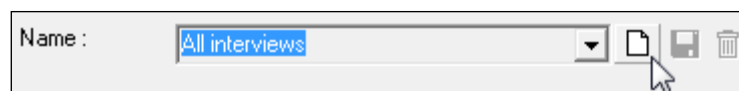
1. In the toolbar, click **new** to create a new table definition.
2. Add a demographic question to the columns of your table, and a different question of your choice to the rows.
3. Ensure *all interviews* is selected in **universe**.
4. Click **results** to view the table.
5. Return to table definition, and in the **general** tab, select *use answering base* from the **universe** list.
6. View the table, and note the result of the different base.

We will now create a filter so that the table only includes respondents in a specific demographic group that combines data from two variables (e.g. males 18-34). You will need to choose a demographic group based on the variables in your QES.

7. Return to table definition, and next to **sub-population**, click the arrow:



8. In the *sub-population* window, click the **new** icon to create a new sub-population definition:



9. Type a name for the demographic group (e.g. males 18-34).
10. Click the first ... button.
11. Select the first demographic question (e.g. *gender*).
12. Select the appropriate response or responses (e.g. males). To select multiple responses, hold down CTRL as you click them.
13. Click **OK**.
14. Click the second ... button.
15. Select the second demographic question (e.g. *age*) and response/s (e.g. 18-34), and click **OK**.

16. Ensure the operator between the two conditions you have defined is **AND**:

The screenshot shows a filter configuration interface. On the left, there are two radio buttons: 'AND' (selected) and 'OR'. To the right, there are two text boxes. The first text box contains the condition: 'if '1. Gender' = (At least one) {'Man' }'. The second text box contains the condition: 'if '2. Age' = (At least one) {'Less than 24' '25 - 34' }'. Each text box has a small '...' button to its right.

17. Click **OK**.
18. View the table.



Askia Vista

1. At the top of the screen, click **new** to create a new table definition.
2. Add a demographic question to the columns of your table, and a different question of your choice to the rows.
3. Ensure *all interviews* is selected in **universe** (in the **general** category of the properties panel).
4. View the table.
5. Now change the universe to *use answering base*.
6. View the table, and note the result of the different base.

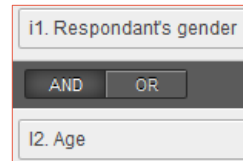
We will now create a filter so that the table only includes respondents in a specific demographic group that combines data from two variables (e.g. males 18-34). You will need to choose a demographic group based on the variables in your QES.

7. At the top of the screen, click **view**, then **filters**.
8. In the *filters* window, click the **new** icon to create a new filter:

The screenshot shows a 'Filters' window. At the top, there is a dropdown menu currently showing 'All interviews'. To the right of the dropdown are two icons: a document icon and a trash can icon. A mouse cursor is pointing at the document icon. Below the dropdown, the word 'Conditions' is visible.

9. In **caption**, type a name for the demographic group (e.g. *males 18-34*).
10. Select the first demographic question (e.g. *gender*).
11. In **comparator**, select the appropriate operator. For example, if you want the respondent to have selected all of the responses you are about to specify, select **all**.
12. Click **responses**, and select the appropriate response or responses (e.g. *males*). Repeat this step for each additional response you want to select. In
13. On the row below your condition, click **+**.
14. Select the second demographic question (e.g. *age*), comparator and response/s (e.g. *18-34*).

15. Ensure that **AND** is selected between your two conditions:



The screenshot shows a filter definition window. At the top, there is a text input field containing 'i1. Respondant's gender'. Below this, there are two buttons: 'AND' and 'OR'. The 'AND' button is highlighted, indicating it is the selected logical operator. Below the buttons, there is another text input field containing 'i2. Age'.

16. In the toolbar, click **save the current filter**:



17. To close the filter definition view, and reveal the rest of the screen, in the top right-hand corner of the screen click **close**.
18. Apply the new filter to your analysis (in the **general** category of the properties panel, open the **filter** list and select your new filter).
19. View the table with your new filter applied.

Exercise 2: Weighting schemes



Askia Analyze only

Optional

This exercise, or steps 6 and 7 within it, may be optional. Please check with your tutor.

1. You will start by creating an interlocked weighting scheme based on age and gender. Look at your age variable to see how many categories it has. You will need to create a matrix of weight targets for each combination of age and sex. Your tutor will suggest the weight targets to use.
2. Start a new weighting scheme. Either start from the tools menu, or if you are viewing a table definition, click the ► symbol to the right of the weighting drop-down in the General tab.
3. Give your weighting scheme a name. Add in your variable and then add the targets for each category. For the sake of this exercise, give each category in your variable an equal proportion, e.g. 50, 50 if you have 2 categories, or 20, 20, 20, 20, 20 if you have 5 categories.
4. Save the weight. Click OK so that the weight is calculated.
5. View the effect of the weight on one or more of your tables.
6. Now, modify your existing weight to add a third dimension. Your tutor will advise you wish variable to use, and the targets to apply. This third dimension will be applied in addition to your existing *age x gender* matrix, so it will force askia to use rim weighting in order to find a weighting solution.
7. Save and apply this weighting, and view the effects of your new weighting scheme on this table.

Session 205 **Printing and sharing reports**

Outline

Topics

In this session, you will learn how to:

- Print individual tables and (in Askia Vista) charts
- Applying table layouts
- Export tables to Word or Excel
- Export part of a table
- Export a portfolio

Learning outcomes

At the end of this session, you will be able to:


- Create and distribute outputs from Askia Analyse and/or Askia Vista in a variety of different formats: in printed format or as Office documents
- Adjust the appearance of your tables using table layouts and tab styles
- Share results from Askia by providing them as Excel or Word documents for you or others to incorporate in their own reports
- Prepare your own Analysis Portfolio in order to share reports with others in Askia Vista

Material Covered

Printing individual tables and charts

Askia Analyze

To print a individual table or chart:

1. Display the table or chart (if it is a multi-page table/chart, you can also begin this procedure by displaying the list of pages).
2. In the **file** menu, select **print**. Alternatively, in the toolbar, click .
3. By default, all pages will be printed. In the print dialog, however, you can specify individual pages to be printed:



Askia Vista

To print an individual table or chart:

1. Display the table or chart.
2. Above the table or chart, click **print....** This prints the current page.

Note: in Askia Vista, it is only possible to print the current page.

Setting the table layout or style

Using a template to set a style for exporting or printing

A quick way to set an appropriate layout before exporting or printing is to select an appropriate tab style. For example, you might want to fit each table onto one page before printing, or to include only percentages before exporting. Applying a template to set the tab style was covered in “Applying templates to tables” on page 26.

You therefore might like to create tab templates specifically to be used for exporting or printing. You can then use it to easily apply the appropriate settings before you carry out either of these operations. Creating a new tab template is covered in the Analysis Assistant. Note that you can select or de-select calculation types, and save these in your tab template. This will

determine which calculation types (e.g. percentages only) appear in any tables to which you apply the template.

Exporting tables to Word, Excel and PowerPoint

Note: exported information is usually static; that is, the content of the Microsoft Office document is not updated when the underlying survey data changes. This may be adequate when you are exporting a one-off spreadsheet or chart. However, if the export is going to be done repeatedly, then a more systematic approach is required.

The optional **Slides** module allows the process to be made more systematic, so that you do not have to repeat all the work each time you are exporting similar charts or dealing with new data or updated data. To export data dynamically, you will need to export to the TabsML format, and the *Slides* application.



Askia Analyse

To export tables:

1. Click the **results** tab to display the tables or charts you want to export.
2. In the **file** menu, select **export**, then **Word** or **Excel** as appropriate.
3. Specify the path of the file you want to create.
4. The file is created, and opened in Word or Excel if they are installed on your computer.
5. From Excel, you can copy and paste content straight into Word as standard text, or as an embedded Excel spreadsheet (in Word, select **Paste Special – Microsoft Excel Worksheet Object**).
6. You can paste raw data from Excel into PowerPoint, and produce a chart there, or produce a chart using Excel's charting Wizard, and then paste the result into a PowerPoint presentation.



Askia Vista

To export tables:

1. When viewing the tables/charts you want to export, above the table view click **export to MS Excel (*.xlsx)**.
2. Depending on your browser settings, a file will automatically download, or you may be asked whether to open or save it; if you are asked, choose to save it, and select an appropriate location on your computer. Tables are exported as an Excel spreadsheet.
3. From Excel, you can copy and paste content straight into Word as standard text, or as an embedded Excel spreadsheet (in Word, select **Paste Special – Microsoft Excel Worksheet Object**).
4. You can paste raw data from Excel into PowerPoint, and produce a chart there, or produce a chart using Excel's charting Wizard, and then paste the result into a PowerPoint presentation.

Exporting part of a table

There are two ways to export part of a table. First of all, you can select a portion of the table and then paste it into another application. Alternatively, you can remove unwanted rows and/or columns from the table, and then export it.

To paste selected table data into another application:

1. Using the mouse, click and drag to select the area of the table you want to export.
2. In Askia Analyse, you can select **copy** from the **edit** menu. In Askia Analyse or Askia Vista, you can right-click and select **copy**, or simply press **CTRL+C**.
3. Switch to the other application, and paste in the data (this is usually done by selecting **paste** from the **edit** menu, or by pressing **CTRL+V**).

Askia Analyse

To export selected table data by removing unwanted rows and/or columns:

1. When viewing the table, click a row or column header to select the entire row or column.
2. Right-click and select **remove**.
3. Repeat steps 1 and 2 for each row or column you want to remove.
4. When you are ready to export the table, in the **file** menu, select **export**, then **Word** or **Excel** as appropriate.
5. Specify the path of the file you want to create.
6. The file is created, and opened in Word or Excel if they are installed on your computer.

Askia Analyse

To remove totals from your table:

1. In the **general** tab of table definition, next to **tab template**, click **settings...**
2. In the section headed **totals**, locate the **show** column. De-select the items that you don't want to appear; for example, to remove the total row, de-select **row**.

Askia Vista

To remove totals from your table:

1. In the properties panel, ensure the **rows** or **columns** category is open (depending on whether you want to remove the total rows or total columns).
2. In the **total** list, select **none**.

Exporting a portfolio



Askia Analyse

To export a portfolio:

1. Ensure the portfolio is visible (in the **window** menu, click **cascade** or **tile**, then click the portfolio window to make it active).
2. In the **file** menu, select **export**, then **Word** or **Excel** as appropriate.
3. Specify the path of the file you want to create.
4. The file is created, and opened in Word or Excel if they are installed on your computer.
5. If you exported to Excel, each table has its own tab in the worksheet.

Creating a weblink to a portfolio

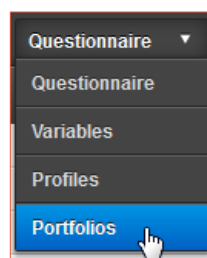


Askia Vista

In Askia Vista, you can create a link to a portfolio; this link can then be pasted into an email message, or a report. People who click on the link can then view the portfolio, and they do not need an Askia Vista license or account to view it. The current version of the portfolio is always available to people who click the link. This means that if, for example, tables are added or the data changes after the link is created, they will still see the up-to-date portfolio.

To link to a portfolio:

1. At the top of the left-hand pane, in the drop-down list, select **portfolios**:



2. Select the portfolio that you want to link to.
3. In the toolbar, click **more** (the gear icon), then **create link**. The *link to portfolio* dialog appears.
4. In **theme**, choose the theme that you want to apply to the portfolio; this will affect the fonts and colours used.
5. In **filter**, select a filter to apply to the portfolio. If you do not want to apply a filter, select **default**.
6. It is a good idea to click **test the link**. The portfolio opens in a new browser tab, showing you what it will look like to the recipients of the link. If you are not entirely happy with it, you can make changes to the portfolio before you publish the link (if this is the case, skip the next step of this procedure).

7. In **link**, the URL (address) of the portfolio is displayed. Select the entire line of text, right-click and select **copy** (or press CTRL-C). You can now paste the link into your email message or report.
8. Click **close** to close the *link to portfolio* dialog.

Recap

In this session, you have learned how to:

- Print individual tables and charts
- Share results from Askia in electronic format by outputting tables and charts selectively into Word or Excel documents
- Share selected results for others to work on in Askia Vista by creating and exporting your own portfolio

Practical exercises

Exercise 1: Exporting tables to Word



Askia Analyse only

1. Create a new definition, combining two variables of your choice.
2. In the **general** tab, next to tab template (or settings in Askia Vista), click **settings**.
3. In the section headed **totals**, locate the **show** column. De-select the items that you don't want to appear; for example, to remove the total row, de-select **row** (rows in Askia Vista).
4. If you are using Askia Analyse, open the **file** menu, select **export**, then **word** or **excel**. Specify a location and file name, and click **save**. The file should open automatically once it has downloaded.
5. If you are using Askia Vista, in the left-hand pane, click **export all pages**. This downloads a zip file containing an Excel workbook. Locate this file and open it.
6. If you just exported to **Word**, now perform an export to **Excel**.
7. From Excel, select the entire table, or a portion of it, and use the built-in **chart wizard** to create a chart.
8. Copy and paste this chart into PowerPoint.

Exercise 2: Exporting tables to Excel



Askia Vista only

1. Create a new table definition, combining two variables of your choice.

2. In the properties panel, open the **rows** category.
3. In total, select **none**. This removes the total row.
4. Repeat steps 2 and 3, but for the **columns** category, to remove the total column.
5. Above the table, click export to MS Excel (*.xlsx). This downloads an Excel workbook. Locate this file and open it.
6. From Excel, select the entire table, or a portion of it, and use the built-in **chart wizard** to create a chart.
7. Copy and paste this chart into PowerPoint.

Session 206 **Advanced analysis: variables and data levels**



Askia Analyze only

This module only applies to Askia Analyze.

Outline

Topics

In this session, you will learn about:

- Creating calculated variables
- Combining variables
- Levels in your data

Learning outcomes

At the end of this session, you will be able to:

- Create more advanced summaries or views of your data by creating new variables derived arithmetically or logically from other questions or combinations of answers
- Combine variables
- Work with hierarchical or multi-level data and produce tables and charts based on different levels

Material Covered

Creating calculated variables

From single and multiple questions

It is possible to create new variables, combining aspects of existing variables in the project.

To create a calculated variable:

1. In the **edit** menu, select **create a variable....** The *create a variable* dialog appears.
2. In **shortcut**, enter a name for the new variable.
3. In **type**, select the appropriate variable type, for example **closed by scripts** to create a closed variable.
4. To add a category to the variable, click **Ins**.
5. Type a label for the category.
6. Click ... to define the new category.
7. In the dialog that appears, select the appropriate question.
8. Select the response or responses (to select more than one, hold down **CTRL** and click each one).
9. Click **OK**.
10. Repeat steps 4-9 for each category you want to add to the new variable.
11. Click **OK** to create the variable. It is added to the questionnaire, and appears in the "calculated questions" chapter at the end of the question list. You can add the new variable to your tables and charts as you wish.

From numeric questions

Note: it is not possible to carry out the following procedure in Askia Vista, but you can import the resulting variable into Askia Vista (This is presented in Session 207 on page 62).

It is also possible to create a new closed variable based on a numeric question. This can be done automatically, with one category for each value in the numeric data.

To create a closed variables based on a numeric variable:

1. In the **edit** menu, select **create a variable....** The *create a variable* dialog appears.
2. In **shortcut**, enter a name for the new variable.
3. In **type**, select **find all values of a script**.
4. Drag and drop the numeric variable into the script box, or type its shortcut within double question marks (e.g. **??Q10??**).
5. Click **OK**. The new variable is created, with a category for each value in the numeric data.

Note that when you use this new variable in a table, you can group categories together, so you do not need to have a separate table row or column for each value. See *Intervals in numeric questions* on page 31 for details on grouping values together.

From an open-ended question

Note: it is not possible to carry out the following procedure in Askia Vista, but you can import the resulting variable into Askia Vista.

When an open-ended question has a limited range of responses (e.g. an “other (specify)” type question relating to a brand list, you can use it to create a closed question.

To create a closed variables based on an open-ended question:

1. In the **edit** menu, select **create a variable....** The *create a variable* dialog appears.
2. In **shortcut**, enter a name for the new variable.
3. In **type**, select **find all values of a script**.
4. Drag and drop the open-ended variable into the script box, or type its shortcut within double question marks (e.g. ??Q8??).
5. Click **OK**. The new variable is created, with a category for each value in the open-ended data.

Combining variables

It is possible to combine two questions together into a new variable.

To combine two variables:

1. In the **edit** menu, select **create a variable....** The *create a variable* dialog appears.
2. In **shortcut**, type the name for the new variable.
3. Optionally, in **caption**, enter a long caption for the variable.
4. In **type**, select **closed by scripts**.
5. In the question list (in the left-hand pane), select all the questions you want to combine (hold down CTRL as you click each question).
6. Drag and drop the selected questions into the dialog.
7. Click **OK**. The new variable appears in the “calculated questions” chapter of the questionnaire.

It is also possible to combine two variables with identical answer lists (for example a “first preference” question with an “other reasons” question). The responses will be added together (e.g. if 100 people selected response 1 in the first question, and 50 answered it in the second question, then the combined question will have 150 responses). This is called *superposing* the questions.

To superpose two variables:

1. In the **edit** menu, select **create a variable....** The *create a variable* dialog appears.
2. In **shortcut**, type the name for the new variable.
3. Optionally, in **caption**, enter a long caption for the variable.
4. In **type**, select **by superposing questions**.
5. In the question list (in the left-hand pane), select all the questions you want to combine (hold down CTRL as you click each question).
6. Drag and drop the selected questions into the dialog.
7. Click **OK**. The new variable appears in the “calculated questions” chapter of the questionnaire.

Working with different data levels

Data levels are used when certain questions are asked a variable number of times to different respondents. For example, there might be a series of questions about the individuals within a household; depending on the household size, the number of questions asked will vary. So, in this example, data levels would allow you to view your data at the level of households, or individuals.

To change data level:

1. During table definition, open the **general** tab.
2. In **level**, select the data level you want to use for your table or chart.

Recap

In this session, you have learned how to:

- Creating new calculated variables from single, multiple, numeric and open-ended questions
- Combining variables to create summaries and aggregations or to recode your data
- Use Levels within Askia to work with hierarchical datasets and produce analyses that summarise data at different levels in your hierarchy

Practical exercises

Exercise 1: Creating new variables

1. Choose two single or multiple variables to combine in your QES file. In the **edit** menu, select **create a variable....**
2. In **shortcut**, type the name for the new variable, and in **caption**, enter a longer description.
3. In **type**, select **closed by scripts**.
4. In the question list, select all the questions you want to combine (hold down CTRL as you click each one). Then, drag and drop these questions into the dialog.
5. Click **OK**. Your new variable will appear in the “calculated questions” chapter of the questionnaire.
6. Create a new table definition, and place your new variable in the rows or columns.
7. Now identify a numeric question from your example project, and go through the process of creating a calculated single variable to present the numeric question as a series of discrete intervals – you can keep it simple by creating no more than 4 or 5 groupings. This time you will use the option **final all values of a script** when creating the variable.
8. Finish off by creating a coded multiple variable on the basis of an open-ended question in your project.

Exercise 2: Switching data levels

Optional

1. Create a new table. Your tutor will tell you which questions to put into the rows and columns.
2. Askia Analyse only: If either of the questions are numeric, you will need to split them into appropriate intervals, by right-clicking and selecting the appropriate **numeric** commands (e.g. **find all values**, then grouping them if appropriate).
3. In the **general** tab, select the appropriate data level, and view the table results.
4. Add the demographic variable or variables specified by your tutor, and view the table results.

Session 207 **Publishing and sharing surveys with Askia Vista**



Askia Vista only

This module only applies to Askia Vista. It uses the administration features in Askia Vista 5.

Outline

Topics

In this module, you will learn how to:

- Use the administrator interface
- Prepare a QES file for publication
- Perform checks before publishing

Learning outcomes

At the end of this session, you will be able to:

- Set up new users to access your projects in Askia Vista
- Define and publish projects in Askia Vista
- Grant permissions to users
- Vary the permissions you give to users

Material covered

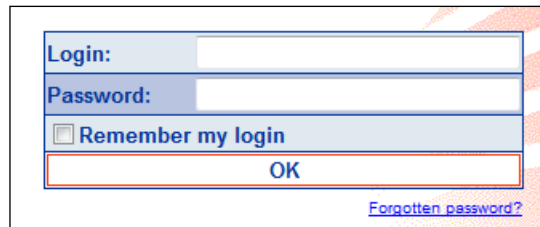
Signing into Askia Vista 5

Signing into Vista 5.

To access the administration features of Askia Vista, you will need to sign into Askia Vista 5.

To log in to Askia Vista 5:

1. Open Internet Explorer.
2. Navigate to the URL provided to you by your system administrator.
3. In the log in screen, enter your user name and password:



4. Click **OK**.

Switching to administration mode.

Managing users

User accounts allows you to manage who has access to your surveys. Users are organised within **groups**, and those groups are organised within **companies**. Companies can be set up for different clients, with groups for different types of user, as required. For example, you might have a group that carries out basic analysis, and a more advanced group that are allowed to create and save variables, define sub-populations, etc.

Adding companies and groups

To add a company:

1. In *administration mode*, click the **users** tab.
2. Right-click a blank area of the left-hand pane, and select **add company**.
3. In the right-hand pane, enter a name for the company, and click **OK**.

To add a group:

1. In *administration mode*, click the **users** tab.
2. Locate and right-click the *company* to which you want to assign the group.

3. In the context menu, select **add group**.
4. In the right-hand pane, enter a name for group.
5. You can set a default survey for the group (we recommend using *most recently opened survey by user in most cases*).
6. In default tab style, select the template that you want applied by default to tab templates created by users in this group.
7. Click **OK** to create the group.

To control which surveys are available to the users in a group:

1. In *administration mode*, click the **users** tab.
2. In the left-hand pane, double-click the group.
3. In the right-hand pane, open the tab labelled **surveys of group**.
4. To remove a survey, right-click it and select **remove**.
5. To add a new survey, right-click and select **add survey**.

Note that surveys available to a group are available to every user assigned to that group.

Adding users

To add a user:

1. In *administration mode*, click the **users** tab.
2. Locate the *company* to which you want to assign the user. If the groups within the company are not displayed, click the **+** symbol to expand the list.
3. Locate and right-click the *group* to which you want to assign the user.
4. In the context menu, select **add user**.
5. In the right-hand pane, enter the details for the user. This should include the user name, email address, login and password.
6. In **authorisation**, carefully select the appropriate user privilege level. This determines what features of Askia Vista the user will be able to access, from simple data analysis only, to administrative features like managing surveys. Managing authorisation levels is described below.
7. New user accounts are disabled by default. To make the account active, clear the **disabled** check-box.
8. To enable the user to log in, you need to set a **password**. Users can change their passwords once they have logged in.
9. You can set the user's access privileges by selecting an appropriate **authorisation** level; these are covered below.
10. You can determine how the table definition interface will look to the user by changing **display mode of definition part**; *one space per questions profile* shows rows, columns and edges on separate rows; *merge the space of rows and columns* shows rows and columns on the same row.
11. You can control what interface is shown by default when the user defines a sub-population, with **default sub-populations mode**;

12. Click **OK** to apply your changes.
13. To send an email to the user containing his/her login details, click **send email** (this will only work if Askia Vista is configured to work with an SMTP email server).

To edit an existing user (e.g. to make their account inactive):

1. In *administration mode*, click the **users** tab.
2. Locate and right-click the user, and select **display**.
3. In the right-hand pane, change the settings for the user.
4. If you want to make the user account inactive, select **disabled**.
5. See the procedure for adding users above, for further notes on user settings.
6. Click **OK** to apply your changes.

Controlling the surveys available to a group

It is possible to control what surveys are available to all members of a group.

To change what surveys are available to a group:

1. In *administration mode*, click the **users** tab.
2. Locate and right-click the group, and select **display**.
3. To add a survey, in the **surveys of group** tab (in the right-hand pane), right-click and select **add survey**. Select the survey you want to make available, and click **open**.
4. To make a survey unavailable, in the **surveys of group** tab (in the right-hand pane), right-click the survey and select **remove**.

For each group, it is possible to set the default tab style used during data analysis, and the default survey that opens when members sign in.

To set the defaults tab style and survey for a group:

1. In *administration mode*, click the **users** tab.
2. Locate and right-click the group, and select **display**.
3. In the right-hand pane, select the **default survey** that will open when group members sign in.
4. In **default tab style**, select the tab style that will be used during data analysis, unless the user selects a different one.
5. Click **OK** to apply your changes.

Managing authorisation levels

Explain **authorisation levels** (you need one for each level or class of user).

By managing **authorisation levels**, you can control exactly what Askia Vista functionality each user has access to. You need one authorisation level for each class of user. In most cases, we recommend that you use the two standard levels of user: *default* and *administrator*.

To add or edit an authorisation level:

1. In *administration mode*, click the **authorisations** tab.
2. To create a new authorisation level, right-click and select **add authorisation**.

To edit an existing authorisation level, right-click it and select **display**.

3. In the right-hand pane, set the properties for the authorisation level. Remember that any access granted here will be given to *all* users who have this authorisation level. When you have finished making changes, click **OK**.

The options include:

Analyse tab	Controls what analysis features will be available at this authorisation level. You can grant or deny access to, among other things, all analysis features (by using the analysis option), portfolios, sub-populations, and searches.
Administration tab	Controls which administration features will be available at this authorisation level. For example, you can grant or deny access to the ability to edit or create users, add, edit or remove surveys.
Authentication tab	Contains account management options, like how often passwords expire.

To assign an authorisation level to a user:

1. In *administration mode*, click the **users** tab.
2. Locate and right-click the user, and select **display**.
3. In the right-hand pane, locate the **authorisation** setting, and select the appropriate authorisation level.
6. Click **OK** to apply your changes.

Importing a survey into Askia Vista

To import a survey into Askia Vista:

1. Carry out the pre-import checks described above.
2. Copy the QES file, and project's .dat folder (see note about inverting the database above) to an appropriate location on the Askia Vista server.
3. In *Internet Explorer*, navigate to your Askia Vista login page, and sign in.
4. In the **view** menu, select **administration mode**.
5. In the left-hand pane, click the **surveys** tab.
6. In the left-hand pane, right-click and select **add survey** from the context menu.

7. Navigate to the folder containing your QES file, and select it. The survey is added to Askia Vista.

To make a portfolio available:

1. In *administration mode*'s **surveys** tab, right-click the survey, and select **import**, then **import portfolio from analyse**.
2. In the window that appears, select the users to whom you want the portfolio to be available (by nominating the **company**, **group** and **user**).
3. In **save level**, select along with the default user level at which items placed in the portfolio will be saved (company, group or user).
4. Enter a name for the portfolio.
5. Finally, click **browse**, and select the portfolio file from your computer, or a network location.
6. Click **OK**. The portfolio is imported into Askia Vista.

Making the survey available to users

You can upload a **portfolio** file from your computer (or a drive on your network) to Askia Vista.

To make the survey available to a group, or to individual users, you need to open the appropriate group or user and add the survey in the **surveys of group** or **surveys of user** tab. The easiest way is to make the survey available to an entire group.

To make surveys available to a group:

1. In *administration mode*, click the **users** tab.
2. Locate and right-click the group, and select **display**.
3. To add a survey, in the **surveys of group** tab (in the right-hand pane), right-click and select **add survey**. Select the survey you want to make available, and click **open**.
4. To make a survey unavailable, in the **surveys of group** tab (in the right-hand pane), right-click the survey and select **remove**.

If you want to limit access to individual users, you can do so.

To limit user access to a survey:

1. In *administration mode*, click the **users** tab.
2. Locate and right-click the user, and select **display**.
3. In the **surveys of user** tab (in the right-hand pane), right-click the survey and select **set offline**. To make it available again, select **set online**. Note that the survey icons show red for available surveys, and blue for unavailable ones.

You can also set a survey offline for an entire group, in which case it is made unavailable to all users in the group.

Setting the survey options

Once your survey is imported into Askia Vista, you can configure it.

To set survey options:

1. In Askia Vista, enter **administration mode** if you are not already there.
2. In the left-hand pane, click the **surveys** tab, then right-click the appropriate survey, and select **display**. The survey properties appear in the right-hand pane.
3. In the right-hand pane, you can set various options, as described below.
4. Click **OK**.
5. Finally, you need to recreate the survey structure to apply your changes. To do so, right-click the survey name, and select **generate survey structure**.

For surveys, the following options can be set:

Description	Allows you to specify some text to identify the survey, which will be visible to users in Askia Vista.
Display ‘don’t knows’/‘not askeds’	Determines whether don’t know or not asked answers will be displayed during analysis.
Question caption in tree/tab	Determines what question property will be displayed in the question list and in tables (the short caption, shortcut or long caption).
Available languages	Allows you to specify which of the survey’s languages are to be available during analysis.

Updating the survey data

When your project collects more data and you want this new data to be available in Askia Vista tables and charts, you need to update the survey in Askia Vista. You can do this manually, or have Askia Vista automatically update the data to a schedule.

Manual data updates

To update the survey data manually:

1. Delete the original QES file, and upload a new one with the same name, containing the current data.
2. In *administration* mode, open the **surveys** tab.
3. Right-click the survey, and select **reload**. The new data is loaded into Askia Vista.

Scheduled data updates

To schedule data updates:

1. Switch to *administration* mode.
2. In the left-hand pane, open the **configuration** tab.

3. Double-click **scheduling tasks management**.
4. In the right-hand pane, right-click and select **new**.
5. Give the task a suitable **name**, (e.g. *hotel survey data update*). In **description**, enter a fuller description of the task, so that you can identify it easily in future.
6. In **type**, select *invert and reload survey*.
7. In **execute**, select the time interval that you want between updates (e.g. *every day*).
8. In **survey**, select your survey.
9. Click **OK**.

Whenever the data file is replaced with a new one, there is no longer any need to manually reload the task; this will happen automatically, according to the time interval you set.

Loading live survey data

It is also possible to load live survey data from askia**CCA**. In this situation, there is no need to copy the data file to the Askia Vista server; the current data will be picked up automatically from the askia**CCA** machine.

To achieve this, you need to set up a *invert and load survey* task, and provide Askia Vista with the details it needs to connect to the CCA. The method of achieving this depends on the version of Askia Vista you are *using*. *The following method is for Askia Vista 5.3.8 and earlier. The procedure for later versions is described below.*

To load live survey data in Askia Vista 5.3.8 and earlier:

1. Switch to *administration* mode.
2. In the left-hand pane, open the **configuration** tab.
3. Double-click **scheduling tasks management**.
4. In the right-hand pane, right-click and select **new**.
5. Give the task a suitable **name**, (e.g. *hotel survey data update*). In **description**, enter a fuller description of the task, so that you can identify it easily in future.
6. In **type**, select *invert and reload survey*.
7. In **execute**, select the time interval that you want between updates (e.g. *every day*).
8. In **survey**, select your survey.
9. In **data storage**, select **the data are stored in SQL server**.
10. Enter the **connection string** and **ID of Survey**, as appropriate. You can determine the connection string as follows:

The **survey ID** can be seen in CCA or Supervisor (right-click the survey and view its properties).

The **connection string** can be found on any PC which can connect to the CCA using Supervisor in the following registry keys:

1. HKEY_LOCAL_MACHINE\SOFTWARE\Peter Holmes\Cca\SurveyDB,
or

2.HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Peter Holmes\Cca\SurveyDB

11. Click **OK** to create the task.

The following method of loading live data is for Askia Vista 5.3.9.0 and later.

To load live survey data in Askia Vista 5.3.9.0 and later:

1. Switch to *administration* mode.
2. In the left-hand pane, click the **surveys** tab, then right-click the appropriate survey, and select **display**. The survey properties appear in the right-hand pane.
3. In the right-hand pane, set properties as follows:
 - **CCA server**: select the CCA server on which the project is running;
 - **Data storage for the inversion**: select **SQL**.
 - **ID of Survey in the CCA**: enter the survey ID (you can identify the survey ID in the survey properties in CCA or Supervisor).
4. Click **OK**.
5. In the right-hand pane, open the tab **tasks of survey**, if it is not already open.
6. In the tab, right-click and select **new**.
7. Give the task a suitable **name**, (e.g. *hotel survey data update*). In **description**, enter a fuller description of the task, so that you can identify it easily in future.
8. In **type**, select *invert and reload survey*.
9. In **execute**, select the time interval that you want between updates (e.g. *every day*).
10. In **survey**, ensure your survey is selected.
11. Click **OK**.

Limiting user access to data using packages

In Askia Vista, it is easy to control what data each user has access to. This can be done by limiting access to specific sub-populations, or to specific questions or chapters in a survey.

Defining a survey package

In order to limit access to specific questions or chapters within a survey, you need to define one or more survey **packages**. Packages are sub-sets of the questions and chapters in the survey that you can assign to groups or users.

To create a survey package:

1. Switch to *administration* mode.
2. In the left-hand pane, open the **surveys** tab and double-click the survey.
3. In the right-hand pane, expand the **survey packages** tab.
4. Right-click in the *survey packages* tab, and select **add package**.
5. Enter an appropriate name.

6. In the list of chapters and questions, ensure that only the items you want to be available are selected.
7. Click **OK**.
8. In the left-hand pane, right-click the survey, and select **generate survey structure**.

Now that you have defined the package, you can assign it to specific users or groups, so that they are restricted to only the questions and chapters defined in the package. Note that if you apply a package to a group, it will be applied to all users within the group.

Assigning a survey package to users or groups

To assign a survey package to a user or group:

1. In the left-hand pane, open the **users** tab.
2. Double-click the group or user to whom you want to assign this package.
3. In the right-hand pane, in the **surveys of group** or **surveys of user** tab, double-click the survey. The survey settings open.
4. If there is a check-box next to **package**, clear it.
5. In **package**, select the package you want to assign.
6. Click **OK**.

Note that the change will not take effect until the user next logs in.

Editing and deleting survey packages

To edit an existing survey package:

1. Display the properties for the survey in question.
2. In the survey packages tab, right-click the appropriate package, and select **properties**.
3. In the dialog, amend the package name, and the chapters and questions you want to be made available in this package, as desired.
4. Click **OK**. You will be asked if you want to re-generate the survey structure. Answer **yes**.

To delete a survey package:

1. Display the properties for the survey in question.
2. In the survey packages tab, right-click the appropriate package, and select **remove**.
3. When asked to confirm the deletion, click **yes**.

Limiting access filters

You can limit access to a user or group, based on a specific **sub-population** (filter) of the data. To do so, you first need to define a sub-population, then you need to apply it to the group or user.

For information on defining a sub-population, see Defining filters or “Sub-populations” on page 36, Note that you must save the new sub-population at group level or higher for other users to see and select it.

Importing sub-populations

You can also import a sub-population from Askia Analyse.

To import a sub-population:

1. In *administration* mode, open the **surveys** tab.
2. Right-click a survey, and select **import**, then **sub-population**.
3. Select the company, group and user, as appropriate.
4. In the list of available sub-populations, select the ones you want to import.
5. Click **OK**.

Once you have created or imported an appropriate sub-population, you can apply it to a group or user, to limit their access to the data set defined by the sub-population (e.g. if your sub-population specifies a geographical region, a group with this sub-population applied will only see data from that region).

To apply a sub-population:

1. In *administration* mode, open the **users** tab.
2. Double-click the group or user to whom you want to apply the sub-population.
3. In the right-hand pane, open the **surveys of group** or **surveys of user** tab.
4. Double-click the survey to which you want to apply the sub-population.
5. If there is a check-box next to **all interviews**, ensure it is *not* selected.
6. In the **all interviews** list, select the sub-population.
7. Click **OK**.

Importing weighting

Importing weighting from Askia Analyse.

If your imported QES contained **weighting** items, you can make them available in Askia Vista. Note that you cannot define weighting in Askia Vista; it must be imported from Askia Analyse.

To make a weighting item available:

1. Enter **administration mode**, if you are not already there.
2. In the left-hand pane, click the **surveys** tab, then right-click the appropriate survey, and select **display**. The survey properties appear in the right-hand pane.
3. In the right-hand pane, click the **weightings of survey** tab.
4. In the *weightings of survey* tab, right-click and select **import weightings**. A window appears listing all the available weighting items in the QES file.

5. Select the weighting items that you want to be available, and de-select the ones you want to be hidden. Note that any changes you make here apply to *all* users viewing the survey, although you can allow or deny access to individual weighting items on a per-user basis. Click **OK**.

Linking to a portfolio

You will need to distribute links to the portfolio so that others can access it. How to create a link that can be emailed was covered in Creating a weblink to a portfolio on page 49.

The stages in preparing a QES file for publication

Before you import a QES file into Askia Vista, you should perform the following. This will make it less likely that you will need to re-import the QES later.

Questionnaire structure	Ensure that the questionnaire structure is as you would like it to appear during analysis in Askia Vista. For example, the question order, chapter organisation, etc.
Weighting	Set up any weighting that you want to make available in Askia Vista. Weighting cannot be defined in Askia Vista itself, so you will need to define it at this stage, if it is not already set up.
Variables	<p>Set up any custom variables that you want to be available in Askia Vista.</p> <p>If there are any variables that you <i>don't</i> want to be available in Askia Vista (e.g. variables created for use during data collection, but not intended for use in analysis), they can be hidden using askiadesign, by switching off their visible in analyse setting. However, note that you can also hide variables from users in Askia Vista, through the use of <i>survey packages</i>.</p>
Inverted database	<p>Finally, ensure that the database is inverted. This will ensure optimum performance during data analysis. To invert the database, in Askia Analyse's tools menu, select re-invert database.</p> <p>When the database is inverted, a new folder is created, containing a series of binary files. The folder has the same name as the QES, but with the suffix ".dat". For example, if the QES is called <i>insurance.qes</i>, the folder is called <i>insurance.dat</i>.</p>

Recap

In this session on Askia Vista, you have learned how to:

- Set up user accounts, and control who has access to what data

- Import sub-populations and weighting from Askia Analyse
- Set up links to portfolios

Practical exercises

Exercise 1: Defining a project on the Askia Vista portal

1. Open your QES file in Askia Analyse.
2. In Askia Analyse's **tools** menu, select **re-invert database**.
3. Copy the file to your Askia Vista server (your tutor will provide instructions on how to do this).
4. Log in to Askia Vista, and switch to administrator mode.
5. In the left-hand pane, click the **surveys** tab.
6. Right-click in the left-hand pane, and select **add survey**.
7. Navigate to the folder containing your QES file, and select it. The survey is added to Askia Vista.
8. In the left-hand pane, right-click your survey, and select **display**.
9. In the right-hand pane, enter a **description** of the survey.
10. Click **OK**.
11. In the left-hand pane, right-click your survey, and select **generate survey structure**.

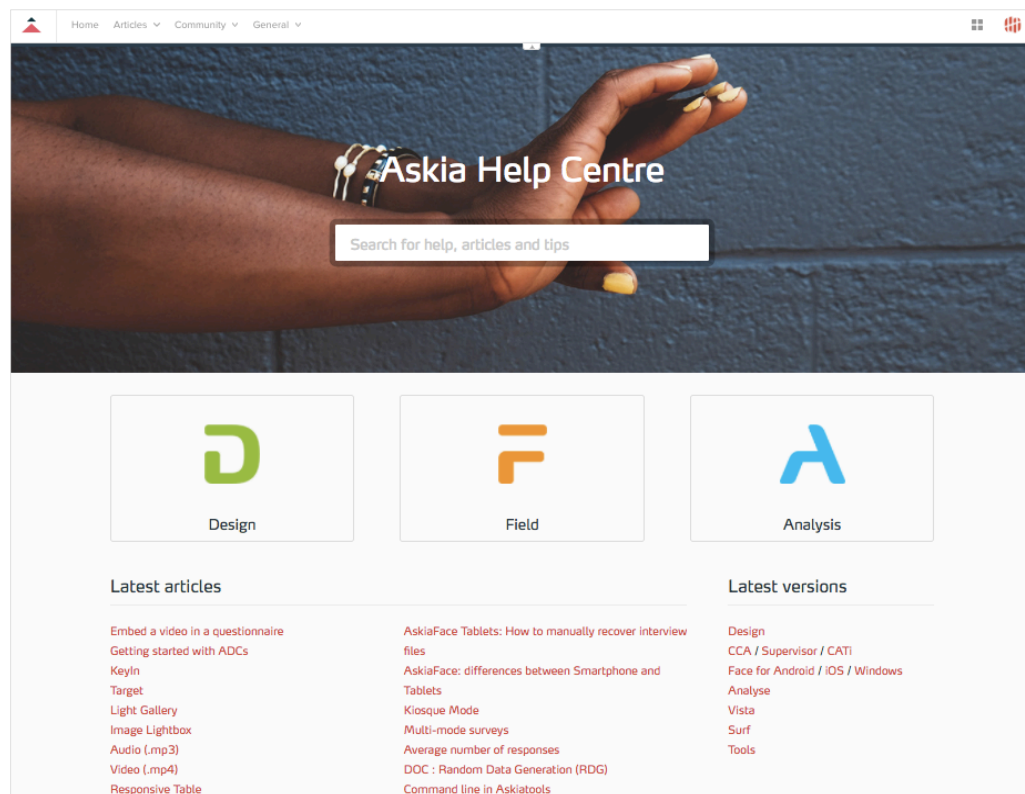
Exercise 2: Granting access to the survey

1. Sign in to Askia Vista version 5.
2. In *administration mode*, click the **users** tab.
3. In the user list, choose a group whom you want to access this survey. Right-click the group, and select **display**.
4. In the right-hand pane, open the **surveys of group** tab.
5. In this tab, right-click and select **add survey**.
6. Select the survey you want to make available, and click **open**.
7. Sign out of Askia Vista 5, and log back in as a member of this group. Open the survey, and try creating a simple cross-tab, as if you were a member of the group.

Afterword

Though you have reached the end of this training course, there is much more to learn about Askia Analyse and Askia Vista. You will find more information online at 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 Analysis Assistant (complete software documentation).
- A searchable database of articles about specific applications of Analyse and Vista, 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 features of the Askia analysis suite, as well as new ones as they are added.