

Askia Training

Course 100

Askia Design
introductory training



Participant's Coursebook



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Introduction

Format

This course comprises ten flexible modular sessions, which permit different learning pathways through the training course. It is primarily intended for research technicians or CAI (computer-assisted interviewing) scriptwriters who will be creating new surveys in Askia or applying changes to existing ones. It is also suitable for researchers who will be performing the duties of the scriptwriter themselves.

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

Session 101	Concepts
Session 102	Creating a basic questionnaire
Session 103	Further question types
Session 104	Refining the questionnaire
Session 105	Routing and logic
Session 106	Viewing the survey
Session 107	Exporting and sharing
Session 108	Advanced design considerations

Recommended learning pathways

All the modules of this course are considered to be 'core modules' and should be followed in sequence. The course focuses only on using the design module. To learn about specific deployment of surveys to any of the Askia Field supported modes: CATI, CAPI or web, participants need to receive specific training relating to the use of Askia Field.

You may not need to learn about all three modes, if your company does not collect fieldwork by all of these methods. Although the first part of the course makes a presumption that you are likely to be designing surveys for the Web, it is equally applicable to other modes – in reality, if you do not use Web, only CATI or CAWI, the principal difference will be in the wording of some of the questions, but all the content as far as the end of module 107 will be relevant. There are some topics in module 108 which only apply to Web.

Example project

This course uses two different projects. It uses the Askia International Credit Card survey, which your tutor will be using to demonstrate Askia Design to you.

In addition, you will have a second project which you will use to create a survey in Askia from the beginning. We have created a survey on the topic of Mobile Internet Usage, which covers, step by step, all of the material introduced in this course. A printed version of this survey can be found in the appendix at the end of this coursebook.

However, it may also be possible for you to use one of your company's own existing surveys as your first example of a survey written by you. Your tutor will need to check that the survey does cover all of the material that is required, and also that it is not too advanced for the topics that will be introduced in this course. In general, we recommend using our example survey, as it has been specifically created with your needs, as a new learner of Askia, in mind.

Our example project is designed to be capable of being administered as a Web survey, a CATI survey, a CAPI survey or as a mixed-mode survey. You will be able to set up those modes that are relevant to your own work and the kinds of surveys your organisation undertakes.

Session 101 Concepts

Outline

Topics presented

In this session, we will introduce you to:

- The different modules of the Askia suite
- Questionnaire design within Askia
- Data collection modes provided in Askia
- The Askia QEX file
- Design Templates

Learning outcomes

At the end of this session you will understand:

- the different modules of the Askia software suite
- the purpose and function of the QEX file in design
- the role of the template

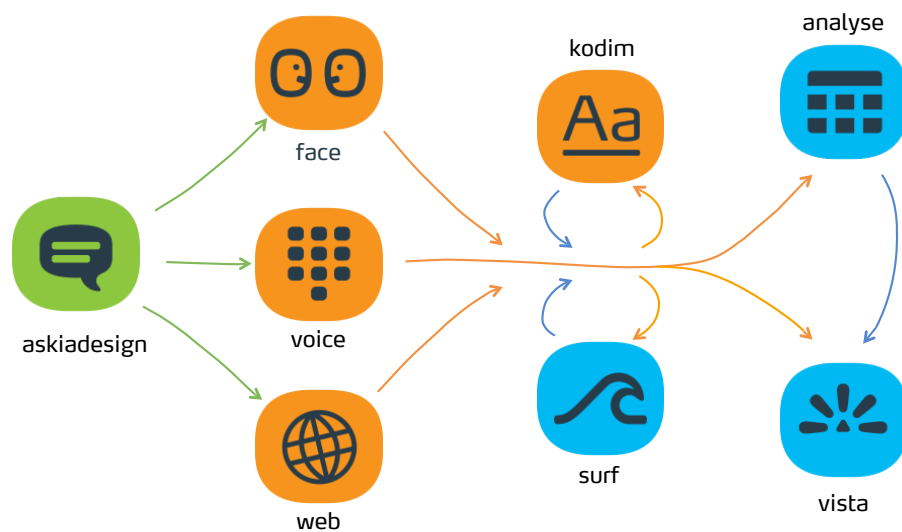
And you will be able to:

- Open an existing survey QEX file

Material covered

How askia works

The modules of the software



Starting askiadesign



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

Recap

In this session, we have:

- Discussed the different data collection modes supported by Askia
- Looked at the different modules in the Askia suite for design, voice, face and web
- Opened a project and examined the structure of a questionnaire in askiadesign

Session 102 **Creating a basic questionnaire**

Outline

Topics

In this session, you will learn how to:

- Create a new questionnaire
- Create single-coded questions
- Create multi-coded questions
- Add or remove “Don’t know” responses
- Save your work

Learning outcomes

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

- Create questions with pre-coded lists of answers
- Choose appropriate names for your questions
- Choose how to handle non-response on questions with listed answers


Material covered

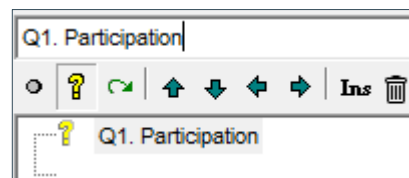
Creating a new questionnaire

- ☐ A new questionnaire is created when askiadesign opens. You can start a new questionnaire by selecting **new** from the **file** menu, or by clicking **new** in the toolbar.

Adding a single-coded question

To add a new question:

-  1. In the left-hand pane, click **insert a new variable (ins)**.
- 2. Type the question shortcut:



- 3. In the right-hand pane, in **long caption**, enter the question text.
- 4. In the right-hand pane, select the appropriate question type – in this case, **closed**.

Adding responses to a closed question

To add responses to a question:

- 1. In the right-hand pane, click **ins** to add a response.
- 2. Type the response text.
- 3. Repeat steps 1 and 2 for each additional response (you can also press enter to add another response, instead of clicking **ins**).

Adding or removing a “don’t know” response

A “don’t know” response is added by default on closed questions. You can easily add or remove such a response at any time.

To add or remove a “don’t know” response:

- 1. In the left-hand pane, ensure the appropriate question is selected.
- 2. In the right-hand pane, select **allow don’t know** to include a “don’t know response” in the question, or clear the option to omit this response.

Question names

Saving your work



To save your questionnaire at any time, in the **file** menu select **save**; alternatively, in the toolbar, click **save**.

Multi-coded questions

The process for creating a multi-coded question is almost identical to creating a single-coded question. The only difference is that you select the option **multi-coded** in the right-hand pane. Note that you can change a question between single and multi-coded at any time. This is useful when, for example, basing a new question on an existing one, such as a multi-coded brand awareness question based on a single-coded “favourite” question.

When creating a multi-coded questions, there are some options specific to this question type, that you will want to review:

Ordered responses	If this option is selected, askia will record the order in which the responses were selected by the interviewer or respondent during the interview. This applies in all interviewing modes (Web, CATI and CAPI).
Number of responses	This determines the maximum number of responses that may be selected by the respondent. For example, you might want a maximum of three brands in a list to be selected.

Adding an exclusive response (“none of these”)

You will often want to create exclusive responses, such as “none of these”, which cannot be selected with any other responses. This is easily done in askiadesign. In the **exclusive** column for the response, simply select **yes**:

<input type="checkbox"/> None of these	No	Authorised
	Yes	
	No	

Recap

In this session on creating questionnaires, we have:

- Set up two different types of questions: single and multiple
- Looked at how to create a list of answers.
- Seen how to set up a “don’t know answer”
- Made a special case of a “none of these” answer on a multiple question to ensure it is mutually exclusive with other answers
- Discussed the importance of choosing appropriate and meaningful questions names for questions.
- Discussed saving your work.

Practical Exercise

Some basic questions

If you are using the Mobile Internet Survey, follow these steps:

1. Start askiadesign and create a new survey. Give it the name “Mobile Internet 1 xx” where xx are your initials.
2. Create the first question:

Q1 Which of these devices do you currently use?

Desktop computer
Laptop computer
Tablet computer including Apple iPad
Smartphone
None of these

You can ignore the instruction to close the survey if “none of these” at this stage, and also the related “thank and close” instruction as we have not covered how to do this yet. It will be covered in session 105.

Take care to select the right kind of question for this. We recommend that you give this question the shortcut “Q1 have smartphone”. Also note that this question should not have a “Don’t know” response. Save your work before proceeding.

3. Now create the second question:

Q2 What kind of smartphone(s) do you currently use?

Apple iPhone
Android phone
Blackberry
Windows phone
Other

We suggest you call this question “Q2 Smartphone type”. Again, consider carefully what kind of question this should be. The participant may have more than one phone. Select “allow don’t know”. Again, save your work before proceeding.

4. Now create question 4:

Q4 We will now ask you some questions about your [show make and model at Q3]. What kind of mobile data contract do you have on your [Q3] smartphone?

Monthly recurring contract
Pay as you go
No mobile data contract – only use WiFi

Select “allow don’t know”. Again, choose an appropriate name, which shows both the question number and, in a few words, what the question is about. Note especially the wording of the question and consider how you will ensure that Askia will collect only valid responses.

Select “allow don’t know”. Again, choose an appropriate name, which shows both the question number and, in a few words, what the question is

about. Note especially the wording of the question and consider how you will ensure that Askia will collect only valid responses.

You can ignore the two special instructions in the text “[**show make and model at Q3**]” and also “**your [Q3] smartphone**” – these are examples of text substitution which we will cover in session 104.

5. Save your work and exit from askiadesign.

If you are using your own survey you should:

1. Start askiadesign and create a new survey. Give it an appropriate short name followed by your initials.
2. Identify and create a single-coded question. Save your work.
3. Identify and create a multi-coded question. Save your work again and after each new question added.
4. Identify and another single and another multiple question. Ideally the multiple question should be one that limits the maximum number of responses that may be given, e.g. the “top three” or “up to five...” Write the question, but you do not need to add any special validation yet – we will introduce how to do this in the next session.
5. Ensure that “don’t know” is removed from questions to which it does not apply.
6. If any question has a “none of these” or “don’t know” response, then set this to be mutually exclusive.

Session 103 Further question types

Outline

Topics

In this session, we will introduce you to:

- Setting up a questionnaire from Word
- Copying questions and response lists between surveys
- Limiting the number of responses to a multi question
- “Other (specify)” answers
- Other question types
- Creating chapters
- Moving content

Learning outcomes

After this session, you will be able to:

- Work productively when transferring a questionnaire design from Word into Askia
- Apply validation rules to specific question types, to improve accuracy during data capture
- Set up questions to handle verbatim texts and numeric responses
- Use chapters to give your questionnaire a structure
- Amend the flow and structure of your survey

Material covered

Using askiaword to import text from Word (Method A)

Askiaword is an add-in for Microsoft Word that allows you to create a questionnaire in Word, then import it into askiadesign. In your Word questionnaire, you need to specify which items are the question captions, chapter titles, and response texts, so askiadesign will be able to identify them during the import process.

For further details on using askiaword, see https://dev.askia.com/projects/askiadesign/wiki/Askiaword_assistant.

To mark an item as a question or chapter:

1. In Word, ensure the **Askia word** ribbon tab is selected.
2. Highlight the question text.
3. In the ribbon, click the appropriate question or chapter type (**single**, **multiple**, **numeric**, **open**, **date**, **loop-single**, **loop-multiple** or **chapter**). The question or chapter appears in the list of questions.
4. If you want to change the shortcut, you can edit it directly in the question list. Likewise, you can edit the long caption by editing it in the **long caption** box.

To mark one or more items as responses:

1. In Word, ensure the **Askia word** ribbon tab is selected.
2. Highlight the response text. To save time, you can select all of the responses in a question at once.
3. In the ribbon, click **answer**.
4. If you want to change the answer text, you can do so directly in the **answers** list.
5. To delete an unwanted answer, right-click it in the **answers** list and select **delete**.

To mark one or more items as grid responses:

1. In Word, ensure the **Askia word** ribbon tab is selected.
2. Highlight the response text. To save time, you can select all of the responses in a grid at once.
3. In the ribbon, click **grid answer**.

To mark one or more items as grid questions:

1. In Word, ensure the **Askia word** ribbon tab is selected.
2. Highlight the item text. To save time, you can select all of the items in a grid at once.
3. In the ribbon, click **grid item**.

To change the question type:

1. In the question list, select the question.
2. In **question type**, select the appropriate type.

Once you have marked up your questionnaire, it is then ready for import into askiadesign.

To import the questionnaire into askiadesign:

1. In Word, open the questionnaire.
2. Ensure the **Askia word** ribbon tab is selected, and that the chapters, questions and responses are marked up, as described above.
3. In the ribbon, click **open in design**. The questionnaire opens automatically in askiadesign.

Copying questions from a survey in Word (Method B)

It is also possible to copy and paste questions and chapters from Word. While this is not as quick as using askiaword (described above), it is useful for importing small numbers of new questions into your survey, or where askiaword is not available.

To copy questions and chapters from Word:

1. In Word, open the questionnaire.
2. For each question in the Word document, create a new question in askiadesign, giving it an appropriate short name (e.g. Q25 Gender).
3. Copy the question text from Word and paste it into askiadesign.
4. Select the appropriate question type.
5. If this is a pre-coded question, paste in the answer list.
6. Repeat steps 2 to 5 for each further question or chapter you want to import.

Copying questions and response lists between surveys

To paste a question from one questionnaire to another:

1. Select the question.
2. In the **edit** menu, select **copy** (or press CTRL+C).
3. Open the destination survey, and click the left-hand pane.
4. In the **edit** menu, select **paste** (or press CTRL+V).

To paste a response list from one questionnaire to another:

1. Select the question containing the response list
2. Select the responses you want to copy (to select multiple responses you can use CTRL+click, or SHIFT+click to select a block of adjacent responses).

3. Open the destination survey, and click the target question in the left-hand pane.
4. Click in the response list.
5. In the **edit** menu, select **paste** (or press CTRL+V).

Answer options

Limiting the maximum number of responses in a multi-coded question

In addition to questions that permit only one response (single questions) and questions that allow many responses (multiple questions), some questions only allow a set number of responses. For these, use a multiple question and specify how many responses can be selected with the **number of responses option**.

To limit the maximum number of responses:

1. In the question list, double-click the question to display its details.
2. In **number of responses**, select the maximum number of responses as appropriate.

“Other (specify)” answers (CATI only)

You can add an “other (specify)” answer to either a multiple or single question. This method should only be used in CATI interviews.

To add an Other (specify) response:

1. In the question list, double-click the question to display its details.
2. Select **semi-open responses**.

Scaled responses

You can set closed questions to have **scaled responses**. This allows you to associate a numeric value with each response. For example, you might set “very good” to 2, “good” to 1, and so on.

1. In the question list, double-click the question to display its details.
2. Select **scaled responses**. The *value* column appears in the response list.
3. In the **value** column of the response list, type the value you want to associate with each response. For example:

Name	Value
<input type="radio"/> Very good	2
<input type="radio"/> Good	1
<input type="radio"/> Satisfactory	0
<input type="radio"/> Poor	-1
<input checked="" type="radio"/> Very poor	-2

Additional question types

The following question types are also available. To set a question to one of these types, simply select the appropriate question type in the right-hand pane.

<i>Type</i>	<i>Purpose</i>	<i>Example uses</i>
Numeric	Collects numeric information	Numbers, quantities Percentage scores Money, price paid etc
Open	Collects textual information It is also used for open-ended questions, as it allows an open answer or verbatim response from a CATI interview to be entered.	Name, address etc Reasons, opinions and other verbatim responses
Date	Collects date information, in the format specified in the Windows Control Panel.	Calendar dates Date of birth etc

Changing the question order

Askia makes it very easy to move a question to a different place in the survey by dragging and dropping.

Deleting questions

Any question can be deleted. If you delete a question by mistake you can add it again using **Undo** to restore the question.

Creating Chapters

Chapters perform several different tasks. They allow you to create a folder or container for several questions. They can also be used to display a text during the interview, such as an introduction or an instruction, without having to ask a question. Most importantly, they let you organise the questions of your survey into different sections, which can make it easier for you to manage your survey.

You can a chapter to display an information only screen in an interview.




INTRODUCTION

Thank you for agreeing to participate in this survey on credit and other payment cards. It should take no more than ten minutes to complete this survey. We are carrying out this survey on behalf of a major international payment services network. The answers you give will be very important to us in developing the company's products and services to its customers such as you.

Please read through the questions carefully and give us as accurate answers as possible. All the information you provide will be treated in strictest confidence. We will not identify you individually to our client.

Question, routing and screen modes

Askiadesign has three modes, each of which is used to create or edit a particular aspect of the questionnaire. You can switch between these modes at any time by clicking the appropriate icon in the toolbar, or by making the appropriate selection in the **view** menu.

Mode	Icon	Purpose
Question		Creating and editing questions and chapters.
Routing		Defining routing, which controls the flow of your questionnaire according to the answers given by the respondent.
Screen		Defining the appearance and layout of interviewing screens.

Testing the questionnaire

It is most important that you test any questionnaire you create very thoroughly. Even if you will involve others in testing your questionnaire, you should always test it yourself first.

Testing is easily achieved in askiadesign by using the special test mode.

Pause and Visible options for Chapters

Chapters can be presented in one of two ways during an interview or data entry:

Pause during data entry	The chapter and its contents will be displayed during an interview
Visible during data entry	The chapter will be presented as a screen during an interview

Recap

In this session, you have learned how to:

- Use the askiaword plug in to create questionnaire that are easily imported into askiadesign
- Copy questions from other surveys to save having to re-enter them.
- Restrict a multiple question to a maximum number of responses allowed
- *CATI only*:
Create a semi-open response to handle “Other (specify)” answers
- Define open text questions
- Define open numeric questions
- Define questions to collect dates
- Move and delete questions
- Add structure to your questionnaire by dividing it into chapters
- Use chapters to display text during the interview
- Switch between question and screen modes
- Test your questionnaire from within askiadesign

Practical exercises

Exercise 1. Importing from Word using askiaword OPTIONAL

Only complete this exercise if you have the askiaword plug-in installed.

Please follow these steps:

1. Open the Word document your tutor provided you with, and mark it up using askiaword. Some of the mark-up has already been done for you.

If you are using the Mobile Internet Survey, you should mark up question Q25 onwards, as follows:

- For each question, assign an appropriate question type and, if it is a pre-coded question, mark up the answer list.
 - Rename each question (by clicking it in the question list, so that it has an appropriate short name, for example Q25 Gender).
 - For Q30, if any routing instructions are transformed into responses, remove these unwanted responses.
 - Put questions Q25-Q31 into the *Classification* chapter by indenting them to the right in the question list.
 - For the closing message, add this as a chapter.
2. Take a few moments to look at the questions and chapters imported. We will now replace these with the questions you have just created. Remember to keep saving your work.

Exercise 2. Copying from Word

All participants. Please follow these steps:

1. Start a new survey, as you did in the previous exercise, and give it an appropriate name
2. Starting at Q25, for each question in the Word document, create a new question in Askia, giving it an appropriate short name (e.g. Q25 Gender).
3. Copy the question text from word and paste it into Askia
4. For each question with an answer list it is a pre-coded question, also add the answer list by copying and pasting this in.
5. Repeat steps 2 to 4 for each question until you have written Q31.
6. Put questions Q25-Q31 into the Classification chapter by indenting them to the right in the question list.
7. For the closing message, add this as a chapter and set the appropriate display option so that it will be presented.

Exercise 3. Copying questions from another project

Askia allows you to have two or more surveys open at once, in different windows and different *instances* of askiadesign. You may already be familiar with this when using other software on your PC.

Please follow these steps:

1. Go to the Windows Start button, or use the desktop icon you may have, to start Askia again (i.e. the same way you started Askia earlier)
2. Now open the survey you started in the previous exercise. Locate the first question you wrote. Copy this.
3. Switch to the new survey and paste this in. You can now delete any equivalent questions from your new survey.
4. Switch back to the existing survey containing the other questions you have set up.
5. Next, select all the other questions in your survey by pressing CTRL+CLICK, or SHIFT+CLICK to select a block of consecutive questions and transfer these to your new survey.
6. When you have finished, close the old survey, but leave the new survey open.

Exercise 4. Moving questions around

Please follow these steps:

1. Review your survey. Are all your questions in the right order?
2. Use the facility demonstrated to you, to move questions up and down.

Exercise 5. Other kinds of questions

If you are using the Mobile Internet Survey, follow these steps:

1. Continuing with the same project in askiadesign, locate the question Q8. Set this to be an open numeric question.
2. Locate Q9. Set this up as an open text question.
3. Create a supplementary question to Q2, called Q2A. It should be an *open-ended* question, with the following text:
Q2A – What other types of smartphone(s) do you currently use?
4. Save your work.

If you are using your own survey you should:

1. Start askiadesign, and open your questionnaire.
2. Identify and create an open numeric question.
3. Identify and create an open text question.
4. Now locate a question you have already created that needs an “other (specify)” answer (or if you cannot find one, create a suitable new question). Add an “other (specify)” open text response to this question.

5. Save your work.

Exercise 6. Creating chapters and testing your survey

If you are using the Mobile Internet Survey, follow these steps:

1. Create a chapter to contain the introductory text and also the screener question (Q1). Amend the chapter so that it displays the introductory text.
2. Create a second chapter for the main questions on smart phone usage (Q2-Q9). Place these questions inside the new chapter. Note that Q3 is a grid with text substitution. Both of these subjects will be covered later in the course – don't worry about this for now; just move the question into the new chapter, along with the others.
3. Now go to the end of the survey, and identify the demographic questions. Give each of these an appropriate name and set them to have the right question types and also appropriate settings for the responses.
4. Save your work.
5. Finally, it's time to test your questionnaire. Choose the menu option to test your questionnaire, and check that questions and answers are presented correctly, in the right order. Do not worry about the cosmetic appearance of the survey at this stage – what you are testing is that the wording and question order is accurate.

If you are using your own survey, follow these steps:

1. Create a chapter to contain the introductory text and also the screener question, if any. Amend the chapter so that it displays the introductory text.
2. Create a second chapter for the main questions.
3. Now identify the demographic questions. Give each of these an appropriate name and set them to have the right question types and also appropriate settings for the responses.
4. Save your work.
5. Finally, it's time to test your questionnaire. Choose the menu option to test your questionnaire, and check that questions and answers are presented correctly, in the right order. Do not worry about the cosmetic appearance of the survey at this stage – what you are testing is that the wording and question order is accurate.

Session 104 Refining the questionnaire

Outline

Topics

In this session, we will focus on

- Sharing response lists and masking
- Rotating and randomising response lists
- Randomisation of a block of questions
- Text substitution
- Loops
- Rotating and randomising blocks of questions

Learning outcomes

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

- Apply randomization to questions, blocks of questions or answer lists to questions
- Reduce effort and improve the maintainability of your surveys by using shared response lists
- Apply validation to questions that share the same list of answers, based on prior responses
- Vary the text of your survey in response to previously given answers or existing data
- Define grid questions by using a Loop construct

Material covered

Sharing response lists

It is possible to share a response list between questions, by **linking** the second question to the first one (the *source* question). This alleviates the need to create the response list more than once, and ensures consistency between the questions.

To share a response list:

1. In the left-hand pane, select the second question (i.e. the one that will pick up the answer list from the source question).
2. In the right-hand pane, click **link**. The *link* dialog appears.
3. In **source link question**, select the source question.
4. Select **all items** to include the response list in your question.
5. Click **OK**.

A small rectangular button with a light gray background and a thin border. The text "Link (inactive)..." is written in a small, dark font.

Masking

Masking is a very common technique in surveys where there are questions that share the same set of answers, such as lists of products or brands, but where some of the answers become ineligible and should not be displayed, as a result of selections previously made by the respondent.

For example, Q4a, Q4b and Q4c all list types of payment cards, but answers given at Q4a should restrict those presented at Q4b and Q4c for any individual respondent.

Link types

There are different options for masking, where the link type can be used to restrict the responses that get displayed, according to answers given at the first question.

- All responses (already covered in example with Q15)
- All selected responses
- All non-selected responses

In the following procedure, we will prevent the ineligible answers at Q4b and Q4c from showing, once eligibility has been determined from the list of answers selected by the respondent at Q4a. Q4a therefore becomes the mask to apply to both Q4b and Q4c.

However, the link type is different for Q4b and Q4c.

- Q4b needs to present “all selected responses” from Q4a
- Q4c needs to present “all non-selected responses” from Q4a

This procedure is carried out in question mode.

To perform masking where previous answers should be included:



1. If you are not already in *question mode*, click **question mode** in the toolbar.
2. In the left-hand pane, select the second question – i.e. the one that will display the selected answers from the other question (in our example Q4b).
3. In the right-hand pane, click **link**. The *link* dialog appears.
4. In **source link** question, select the original question (in our example, this would be Q4a).
5. Select **all selected responses** to include only the answers to Q4a selected by the respondent.
6. Click **OK**.

Link (inactive)...

To perform masking where previous answers should be excluded:

1. Repeat the previous sequence described for Q4b, this time selecting Q4c in the left pane.
2. In the right-hand pane, click **link**, and when the *link* dialog appears, select the original question (which is, as before, Q4a).
3. Select **all non selected responses** to exclude the answers to Q4a selected by the respondent.
4. Click **OK**.
5. Always test your linked questions to ensure you have applied your masking logic correctly.

Link (inactive)...

Rotating and randomising

Rotating and randomising response lists

For a closed question, it is possible to vary the order in which responses are presented during the survey. **Randomisation** shuffles the order of responses for each respondent. While **rotation** follows the standard order, but begins the list in a different place for each respondent.

To rotate or randomise the response order:

1. In the left-hand pane, select the question.
2. In the right-hand pane, click **rotation**. The *rotation* dialog appears.
3. Select **randomise the order** or **rotate the order** as appropriate.
4. Click **OK**.

Rotation (inactive)...

Fixing items in a randomised list

When a response list is randomised, you can fix individual items in the list. For example, you can use this option to fix an item at the end of the list, while the other items are presented in a random order.

To fix a response in place:

1. In the response list, locate the item you want to fix in place.

2. In the **rotation** column, change the setting to **fixed**.
3. If you want the response to always appear directly after the previous response in the list, no matter where the previous response is displayed, instead change the setting to **always follow previous**.

Randomising response lists will ensure that the list is presented in a different order to each participant, either starting at a different position (rotation) or where all of the responses in the list are in a random position.

Text substitution

Presenting the answer to a question

You can include the previous answers in your question text. To do so, enter the shortcut of the source question surrounded by double question marks (??). For example:

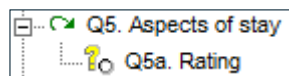
Please select one or more reasons why ??Q4?? is your favourite?

Grid questions (loops)

Loops enable you to create grid-type questions.

To create a grid question:

1. First, create a question containing the statements you want to appear down the side of the grid.
2. In the left-hand pane, click the question, then click **transform item into a loop**.
3. In the right-hand pane, select **question table**.
4. Create a new question containing the statements you want to appear across the top of the grid.
5. In the question list, ensure the new question is indented beneath the loop:



Randomisation of a block of questions

Using seeds to apply the same random order

Askia design can ensure that randomised blocks of questions, or randomised response lists, will always use the same random sequence for a given

¹ If time permits, you can demonstrate how to exclude the “Don’t Buy” after you have covered conditions, or at the very end of the course. example at the end of the course. Otherwise, explain here that there is a worked example in QEX file for the Credit Card survey that shows how to do this which you will provide to them at the end of the course

respondent. This is achieved by setting an identical **seed value** for each of the randomisations that need to appear in the same order.

Seeds can be applied to linked questions and also to blocks of questions defined as chapters.

To set the seed value on a response list:

1. In the left-hand pane, select the question.
2. Click **rotation**. The *rotation* dialog appears.
3. Select **use seed**, and type a number. This will be used as the basis of the randomisation.
4. Repeat steps 1-3 for each randomised question. Ensure you enter the *same* number for each of the questions you want to share the same sequence.

To set the seed value for a block of questions in a chapter:

1. In the left-hand pane, select the chapter.
2. Click **rotation**. The *rotation* dialog appears.
3. Select **use seed**, and type a number. This will be used as the basis of the randomisation.
4. Repeat steps 1-3 for each randomised question or chapter. Ensure you enter the *same* number for each of the chapters you want to share the same sequence.

If you use the same seed value for rotations of both chapters and response lists, askia will use the same order for both. This is useful if you have a list of brands that you wish to randomise, and sometimes it is used to define a response list, and sometimes the brands appear as separate questions. Using the same seed whenever the brands are presented in either response list or chapter will ensure the respondent will always see them presented in the same order.

When the number of randomised items varies

If the number of randomised items varies, i.e.;

- the number of questions within a series of randomised chapters, or
- the number of responses in a series of randomised questions,

the seed value will not work.

However, you can work around this by creating dummy questions or responses to ensure the number of randomised items is the same. You can then hide the dummy questions or responses by using the routing condition **ignore responses**. This is described in session 105.

Randomising a block of questions

It is possible to vary the order in which a series of questions are presented during interviewing, by using rotation or randomisation.

To rotate or randomise question order:

1. Create a chapter and place the questions into it.

2. In the left-hand pane, select the chapter.
3. Ensure the option **pause during data entry** is not selected, unless you want to display the chapter's long text before the questions are presented.
4. Click **rotation**. The *rotation* dialog appears.
5. Select **randomise the order** or **rotate the order** as appropriate.
6. Click **OK**.

Link (inactive)...

Questionnaire versions

Askiadesign keeps a log of changes made; these can be viewed by selecting **revision history** from the **file** menu. When you save the questionnaire, a new revision is created (when **create a new revision** is selected). If you wish, you can record the details of any changes you have made in this version (in the **description** field), along with your name (in the **author** field).

Recap

In this session, you have learned how to:

- Share response lists between questions, in order to save effort and also improve the maintainability of your script
- Apply randomisation or rotations to response lists on questions
- Use a loop to randomise the order in which questions are asked
- Use chapters to randomise sections of a questionnaire or a series of questions that are not defined in a loop
- Display the answer to a previous question using text substitution
- Set seed values within random or rotated items, so that the presentation order is set by the first instance of the list

Practical exercise

Refining the questionnaire

(a) With the standard survey

If you are using the Mobile Internet Survey, follow these steps:

1. Locate Q2 and set the rotation on this question to **randomise the order**.
2. Locate Q7, and, in the question text, ensure the short-cut for Q6 is located inside double question marks at the appropriate place to allow text substitution. For example:

You said you have used ??Q6??, which one of these do you do you think is the most useful to you?
3. Locate the chapter you created for the smartphone questions. Set the rotation option on the chapter to **randomise the order of sub-variables**. Set the **seed** for the chapter to **1**. Then create a chapter for each of the tablet and laptop sections, place the appropriate questions within the chapter, and set up the randomisation in the same for way.
4. Locate Q13, and ensure it is set up as a grid. To do so, click Q13, then click **transform item into a loop** and select **question table** as the loop type. Then, create a new single-coded question containing the statements to go across the top of the grid (*User a lot*, *Use a little* and *Don't use*) and ensure this new question is indented beneath the loop.
5. Save your work, then click **test the questionnaire** to view the result of the changes you have made.

(b) With your own survey

If you are using your own survey you should:

1. Select an appropriate single or multi-closed question for response randomisation. Set the rotation on this question to **randomise the order**.
2. Select a question whose answer you can include in the question text of a later question. Now create a new question, and include the earlier question's shortcut inside double question marks – for example *What reasons do you have for saying that you like ??brand??*.
3. Identify a group of questions in your project whose order could be randomised. Create a chapter to hold these questions, place the questions into the chapter, and set the rotation option on the chapter to **randomise the order of sub-variables**.
4. Now add a grid to your project. To do so, create a question containing the statements you want to appear down the side of the grid, then click **transform item into a loop** and select **question table**. Finally, create a new question containing the statements you want to appear across the top of the grid and ensure the new question is indented beneath the loop.
5. Save your work, then click **test the questionnaire** to view the result of the changes you have made.

Session 105 Routing and logic

Outline

Topics

In this session, you will learn how about:

- Routing
- Logical conditions
- Routing actions
- Blocking messages

Learning outcomes

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

- Create and apply logical conditions to your survey
- Set appropriate routing actions to create routing structures or apply custom validation.
- Apply validation to questions that share the same list of answers, based on prior responses

Material covered

Routing

Askiadesign makes it easy to control the flow of your questionnaire, according to the answer given by respondents.

In askia, there are three parts to each routing:

- the decision point (in askia, this is called the **start question**), which is where the decision occurs,
- the **condition**, and
- the **action**.

By adding routing conditions, you can take the respondent to a specific question, or to the end of the interview, thereby skipping sections of the questionnaire that are not relevant to them.



Routing conditions are defined in routing mode; click **routing mode** in the toolbar, if you are not already in this mode.

Using routing to close an interview

In the following procedure, we will assume that Q1 asks the respondent whether he/she wants to participate in the survey. We set up a routing based on this; if the answer at Q1 is not “yes”, then we skip to the end of the survey.

To set up a routing condition:



1. In the right-hand pane, click **ins**.
2. In **start question**, select the question on which the routing will be based (in our example, this will be Q1).
3. Select the appropriate **execute** option to determine when the routing condition is carried out. For example, to carry out the routing condition after the start question has been asked, select **after**.
4. If you want to specify one or more responses that must be selected for the routing condition to be satisfied, select **at least one**, then select the responses in the adjacent list. If you want to specify responses that should not be selected for the condition to be satisfied (in our example, this would be “yes”), select **none**, then select the appropriate responses.
5. In **action**, we select what happens if the routing condition is satisfied. To jump to another part of the questionnaire, select **go to**.
6. In **target question**, select the question you want respondents to jump to if the condition is true. To take them to the end of the survey, select **{end}**.

Using routing to skip a question

In the example Credit Card survey, Q6 is not asked if Q5 is answered “no”. We therefore need to apply the action “Do not ask” to this condition before the question is asked.

Q5. Now just thinking about your credit cards, Is there any one credit card that you use more often than the other(s)?

Yes

> Q6

No

> Q7

Q6. Is there one card which has a larger balance outstanding than the others?

Yes

No

“Do not ask” actions and chapters

The “Do not ask” routing action can also be applied to whole chapters. This then means that all the questions in that chapter will not be asked, when the condition you define is true. This provides a very convenient and reliable way of creating routing in surveys. Sometimes it is worth defining chapters simply to be able to route around them.

Using routing to set up an “other (specify)” question

In session 103, we saw how to create an open-ended “other (specify)” question. To ensure that it is only presented to appropriate respondents, you must set up a “do not ask” routing instruction.

To set up a “do not ask” routing instruction for an “other (specify)” question:

1. Define a separate Open question with an appropriate name (e.g. Q17open) to capture the verbatim response to the “Other (specify)” response.
2. At the top of the screen, click routing mode.
3. Click **Ins** to insert a new routing instruction.
4. In **start question**, select the closed question containing the “other” response.
5. Click **none**.
6. Click the response “other (specify)”.
7. In **action**, select **do not ask**.
8. In target question, select the open-ended question.

Choosing between a routed open or semi-open question for “Other (specify)” responses

There are some important differences in Askia between how these two different methods for capturing an “Other (specify)” operate.

- The Semi-open option allows CATI fieldwork supervisors to check and even group together similar responses in the other specify, without having to extract the data for coding.
- Semi-open does not support dynamic text substitution; writing a separate open question does support this fully
- it is slightly easier to extract and code text from standalone open text question than it is from a semi-open question

We therefore recommend that in most cases, you create a normal “other (specify)” answer which routes to a separate open text question to capture any open-ended responses, and that you always do this for web or CATI surveys.

Semi-open questions may be useful for CATI interviews where there are brand lists or similar lists of names, and where any answers provided are going to be very short. Otherwise, use the method shown here, with a separate routed open question.



Other (Specify) methods compared. For more information, we recommend you read a short Knowledge Base article which compares the different capabilities of Semi-open and routed Open questions. Go to the Knowledge Base and search for “Semi-open questions in askiadesign”.

Validation

Hard validation using **Blocking Messages**

Q10 Now thinking of the most recent statement you paid on your [Q7] card, did you...

- | | |
|---|-------|
| 1. Pay the minimum payment amount shown on the statement | > Q11 |
| 2. Pay more than the minimum amount but less than the full amount | > Q11 |
| 3. Pay the full amount and clear the outstanding balance to zero | > Q12 |
| 4. I was unable to make the minimum payment | > Q11 |
| 5. Prefer not to say | > Q11 |

Q11 What was the approximate balance outstanding on your [Q7] card after you made your last payment?

Enter amount _____

If the respondent has selected item 4, “I was unable to make the minimum payment” at Q10, then the outstanding balance cannot be zero. If it is zero, we wish to force the respondent to either change the answer to Q11, or Q10, as appropriate, to remove this inconsistency.

To set up a blocking message:



1. In the right-hand pane, click **ins**.
2. In **start question**, select the question whose answer you want to check (in our example, this would be Q10).
3. Select the appropriate **execute** option to determine when the routing condition is carried out. In our example, we would select **after** to check the routing immediately after Q10.
4. Select **none**, then select answer item 4.
5. In **action**, select **show message**.
6. Select **blocking message**.
7. Beneath this, type the message text (e.g. “*You said you were unable to make the minimum payment on your last bill, yet you have said the outstanding balance at that time was zero. Please go back and change the answer to either the last question or the one before that*”).

Soft validation using a warning message

By defining a message and not selecting (or de-selecting) Blocking message, you can create a 'soft' validation message or warning in which you can suggest the respondent goes back to correct an error, but you also allow them to continue.

Using routing to hide dummy items in randomised lists

As discussed in session 104, if you have two or more seeded randomised lists (either questions or responses) with differing numbers of items, you can add dummy questions or responses to ensure the randomisation seed works. However, the dummy items will be displayed during the interview. It is possible to use routing to hide these items.

To hide one or more responses using routing:



1. In the right-hand pane, click **ins**.
2. In **start question**, select the question that the responses belong to.
3. In **execute**, select **before**.
4. Select **at least one**, then select *all* of the responses. This ensures the routing is carried out no matter which responses are selected by the respondent.
5. In **action**, select **ignore responses**.
6. In **target question**, select the question.
7. In **ignored responses**, select the dummy response or responses.

To hide a question using routing:



1. In the right-hand pane, click **ins**.
2. In **start question**, select the question you want to hide.
3. In **execute**, select **before**.
4. Select **at least one**, then select all of the responses.
5. In **action**, select **make question invisible**.
6. In **target question**, select the question.

More advanced routing constructs



Advanced routing. We are only presenting the most commonly used forms of routing in this introductory course. There are other methods that you will need to learn, and to help you learn these, we have prepared a special Knowledge Base article on the subject of advanced routing which gives you worked examples of these other methods. We recommend that you read this article after you have completed this course, as a part of your continuing learning.

Conditional text substitution

The example text for Q7, which we covered earlier, needs to take into account the answers previously given in order to construct the relevant question text to present. This is because the actual text to display is conditional on the answer or combination of answers given previously in the interview, and will vary from one interview to the next.

It is done by introducing some logical script into the text, as follows:

```
We would now like to ask you some questions just about
the credit card !!On(??Q5?? Has {1}, "you use most
often", On(??Q6?? Has {1}, "with the largest balance
outstanding", On(??Q6?? Has {2}, "that you used most
recently", "")))!. What is the name of this card?
```

Recap

In this session, you have learned how to:

- Define routing
- Apply routing to terminate an interview
- Using “Go to” to skip round a question or section
- Using “Do not ask” to skip individual questions or blocks of questions in a chapter
- Present a hard validation message using a “blocking message” to force the respondent to go back and make a change
- Present a soft validation message (by not making it a “blocking message”) to suggest changes but not enforce them
- Apply masking to prevent ineligible answer options from being presented on related questions that share the same answer list
- Apply conditions to text substitutions

Practical exercise

Working with routing instructions

(a) With the standard survey

If you are using the Mobile Internet Survey, follow these steps:

1. In this project, Q1 screens out respondents (i.e. excludes those participants) who answer *None of these*. Switch to *routing mode*, set up a new routing instruction, and set the **start question** to Q1.
2. In **execute**, select **after**. Select **at least one**, and then select **None of these**.
3. In **action**, select **go to**, and in **target question**, select **{End}**.
4. Set up a similar routing to send respondents who do not answer 4 (*smartphone*) at Q1 to Q10. When setting up the routing, select **none** and then the response **smart phone** to ensure that respondents without smart phones are affected by the routing.
5. Switch to *question mode* and locate Q7. Set its link property to **all selected responses**. Finally, in **source link question**, select Q6.
6. Click **OK**, and then save your work.
7. Click **test the questionnaire** to view the result of the changes you have made.

(b) With your own survey

If you are using your own survey you should:

1. In your project, find a question whose answer might either screen out a respondent entirely, or cause them to skip some of the other questions. Switch to *routing mode*, set up a new routing instruction, and set the **start question** to the question you identified.
2. In **execute**, select the appropriate point in the questionnaire when you want the routing instruction to take effect (e.g. immediately after the start question, or directly before a block of questions that might be skipped). Select **at least one**, and the response or responses that will cause the respondent to skip ahead.
3. In **action**, select **go to**, and in **target question**, select the point you want the respondent to jump ahead to: another question, or the end of the survey.
4. Switch to *question mode* and create a question that can display the answers to an earlier question.
5. Select the new question and set its **link** property to **all selected responses**. Finally, in **source link question**, select the earlier question (whose selected answers you want the new question to display).
6. Click **OK**, and then save your work.

7. Click **test the questionnaire** to view the result of the changes you have made.

Session 106 **Viewing the survey**

Outline

Topics

In this session, you will learn about:

- Screens, and how to generate them
- Using existing templates
- Making simple modifications to templates and formatting
- Creating web controls: response blocks

Learning outcomes

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

- Achieve a consistent look and feel for your survey
- Understand the relationships between templates and local overrides
- Preview and test your survey

Material covered

Automatically generating screens

In **screen mode**, you can change the layout and appearance of your interviewing screens. The easiest way to get started is to have askiadesign automatically generate a screen for each question. You can then edit the individual screens as required.

To automatically generate screens:



1. If you are not already in *screen mode*, click **screen mode** in the toolbar.
2. In the **screens** menu, select **generate all**.
3. In the left-hand pane, click the **screens** tab to view the list of screens that have been generated.
4. In the left-hand pane, double-click a screen to view and edit it.

Previewing screens and testing the survey

Using the library

You can use the **library** to set the default Internet and screen settings, as well as to share questions with your co-workers.

The **local library** is located on your computer, typically at *C:\ProgramData\Askia\Biblio.bib*. This file is usually only visible to people using your computer, although you can, if you wish, share it with other users across a network (contact your network administrator for details).

You can also set up a **global library** for everyone in your team to share. Creating a global library is explained in *Using libraries to re-use and share questions* on page 48, where you can also find details on using libraries to share questions with your co-workers.

To specify a template as the default for internet settings:



1. In the **edit** menu, select **library management** (or in the toolbar, click **library management**). The *library management* dialog opens.
2. Click the **internet** tab.
3. In the list of templates, right-click a template and select **set default**.
4. Click **close**.

To specify a template as the default for screen settings:







1. In the **edit** menu, select **library management** (or in the toolbar, click **library management**). The *library management* dialog opens.
2. Click the **generation** tab.
3. In the list of templates, right-click a template and select **set default**.
4. Click **close**.

Testing the survey

When you test the survey in screens mode, you can view the appearance of your screens, as well as test the survey structure.

To test your questionnaire in screen mode:

-  1. In the toolbar, click **test the questionnaire**.
-  2. Use the navigation bar at the bottom of the screen to move between interviewing screens (e.g. use the arrow buttons to step forwards and backwards through the survey).
-  3. To jump to a specific question, click **place yourself anywhere in the questionnaire**, select the desired question and click **OK**.
-  4. To return to return to screen mode, click **stop**.

Using existing templates

It is easy to apply an existing template to your screens. Note that this will over-write any changes you have made to individual screens.

To apply a template to your screens:

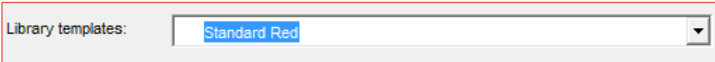
1. In the left-hand pane, click the screen group. Then right-click it and select **properties**.
2. In **library templates**, select an existing template.
3. Click **OK**.
4. Right-click the screen group and select **generate**. Answer **yes** when asked (this will over-write any changes you have made to individual screens).

Making simple modifications to templates and formatting

You can easily make changes to the template, then save it as your own custom template.

To create your own template:

1. In the **screens** tab, click a screen group, then right-click it and select **properties**.
2. In the various tabs, make changes to the settings (e.g. in the **screen** tab, change the **background colour** and **font colour**).
3. At the top of the dialog, in **library templates**, type a new name for the template:



Library templates: Standard Red



4. To the right of the *library templates* list, click **save**.
5. Click **OK** to close the properties dialog.
6. To apply your changes to the screen group, right-click the group and select **generate**. Answer **yes** when asked (this will over-write any changes you have made to individual screens).

Recap

In this session, you have learned:

- What screens are and how to generate them
- How to test your survey in screen mode
- How to apply a pre-defined look and feel for your screens from an existing template
- Some simple properties you can change to alter the appearance of your screens
- How to create a new template from the changes you have made, to apply to other projects





Practical exercise

Working with templates

Please follow these steps:

1. Switch to *screens mode*, and in the **screens** menu, select **generate all**.
2. In the left-hand pane, select the **screens** tab.
3. Click the screen group to select it. Now, right-click the group and select **properties**.
4. In **library templates**, select the **askia grey** template. Then click **OK**.
5. Right-click the screen group and select **generate**. When asked to confirm your action, click **yes**.
6. Save your work, then click **test the questionnaire** to view the result of the changes you have made.
7. Right-click your screen group again, and select **properties**.
8. Click the screen tab, and change the **background colour** and **font colour**.
9. Now let's save your changes by saving them to a new template. At the top of the dialog, to the right of the *library templates* list, click the **Save as new** icon (shown left).
10. In the **library templates** box, type a name for your new template:



Library templates:    



11. To the right of the *library templates* list, click **save**. Then, click **OK** to close the dialog.
12. Now re-generate the screens, to apply the changes you have made. Right-click the screen group and select **generate**. When asked to confirm your action, click **yes**.
13. Save your work, then click **test the questionnaire** to view the result of the changes you have made.

Session 107 **Exporting and sharing**

Outline

Topics

In this session, you will learn about:

- Local and global libraries
- Multi-lingual surveys
- Export to Word
- Saving the QES file with and without data

Learning outcomes

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

- Using libraries to re-use and share questions and response lists
- Define additional interviewing languages
- Extract texts for translation by an external translation agency
- Enter or Import language translations for the text of the survey
- Share the questionnaire with your client or project director by producing a Word version of the survey

Material covered

Using libraries to re-use and share questions

You can copy any question or chapter to your local library. It can then be copied from the library into other questionnaires. This saves you time when creating similar questions, and helps create consistency between questionnaires.

To copy a question or chapter to the local library:


1. In the question list, right-click the question or chapter and select **add to the local library**....
2. If you are asked whether you want to copy the routings or screens, answer **yes**.
3. In the *categories* dialog, select a category into which you want to place the question or chapter. If there isn't an appropriate category already present, you can type one at the bottom of the dialog. Then, click **OK**.

To copy a question or chapter from the library to a questionnaire:


1. In the question list, right-click anywhere and select **library**.
2. At the top of the *library* dialog, select the category containing the question or chapter you wish to insert.
3. Drag and drop the question or chapter from the library into the question list in the left-hand pane.
4. If you are asked whether you want to copy the routings or screens, answer **yes**.
5. Close the *library* window.

AskiaDesign also offers a **global library**. This library resides at a shared location (such as a network drive), and allows you to share questions and chapters with your co-workers. You need to connect askiadesign to the global library; if your organisation does not yet have a global library, you need to define one.

To define a global library:

1. In the edit menu, select **library management**.
-  2. For the **global library** (at the top right of the window), click **new**. Specify the location and file name of the global library. You should choose a location that is accessible to everyone who will need to use the global library.
3. Close the *library management* window.

To connect to an existing global library:

1. In the edit menu, select **library management**.
-  2. For the global library (at the top right of the window), click **open**. Specify the location and file name of the global library. You should choose a location that is accessible to everyone who will need to use the global library.

3. Close the *library management* window.

To copy a question or chapter to the global library:

1. In the question list, right-click the question or chapter and select **add to the global library....**
2. If you are asked whether you want to copy the routings or screens, answer **yes**.
3. In the *categories* dialog, select a category into which you want to place the question or chapter. If there isn't an appropriate category already present, you can type one at the bottom of the dialog. Then, click **OK**.

To copy a question or chapter from the global library to a questionnaire:


1. In the question list, right-click anywhere and select **library**.
2. At the top of the *library* dialog, select the category containing the question or chapter you wish to insert. Note that the categories in the global library are at the bottom of the list.
3. Drag and drop the question or chapter from the library into the question list in the left-hand pane.
4. If you are asked whether you want to copy the routings or screens, answer **yes**.
5. Close the library window.

Multi-lingual surveys

Setting up multi-lingual questionnaires.

Declaring the languages

To declare the languages to be used in your survey:

1. In the **edit** menu or toolbar, select **languages**. The *languages* dialog opens.
2. Right-click in the window, and select **insert**.
3. Select the language you want to add, and click **OK**.
4. Repeat steps 2 and 3 for each further language you want to add.
5. The default language is indicated with the  icon. If translated text is not available for a specific question, the text from the default language will be displayed during the interview. To set a language as the default, right-click it and select **set as default**. However, do not do this once you have begun work on a survey: see the note below for details.
6. Click **OK**.

Note: You should not change the default language once you have begun work on a survey. We recommend that you set the default language before you start to create a questionnaire.

Adding a “select language” question

To switch to the appropriate language during the questionnaire, you should add a “select language” question at the start. You then need to add an appropriate routing instruction, so that Askia switches to the language selected by the respondent or agent.

To add “select language” to your questionnaire:

1. Add a question to your project asking the respondent which language he/she wants to use, and place this at the start of the questionnaire.
2. Switch to routing mode.
3. Add a new routing for the first language in your questionnaire. The **start question** should be your language question.
4. In the list of responses, select the first language (in our example, it will be espanol).
5. In **action**, select set **language**.
6. In **language**, select the appropriate language (in our example, *espanol*).
7. Repeat steps 3-6 for each additional language in your questionnaire.

Adding the translated texts

Adding translations directly in askiadesign.

There are two ways to add translated texts to your survey:

- Directly in askiadesign. This is useful if you are only entering a few texts, or making a few edits to previously translated text.
- Using askiatranslator. This is our recommended method, as it makes entering large amounts of text much easier, and it allows you to easily send texts out for translation by an external translation agency.

Entering individual texts

To enter translations directly in askiadesign:



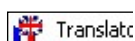
1. In the toolbar, click **languages**.
2. Select the appropriate language, and click **OK**. The status bar at the bottom right of the screen displays the current language.
3. Replace the text in the questionnaire with the translated text.

Working with an external translator

To work with an external translator, you need to:

- Export the questionnaire texts as an Excel file, and send them to the translator, who enters the translated texts in Excel.
- Import the translated texts.

To export texts for translation:



1. Start askiatranslator.
2. In the **file** menu, click **open...**, and select your questionnaire. Note that you can also enter translated texts directly in askiatranslator, by typing the translated text into the appropriate column.

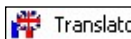
3. In the **file** menu, click **export text file for translation...**
4. Choose the languages you want to export, and click **OK**.
5. Choose a file name and location for your text file and click **save**.
6. Send the file to your translator. He or she can enter the translated texts in *Excel* as described below.

If your translator provides the translated text by entering it into the Excel document created by Askia when you exported the text, you can have Askia import the translations and add them automatically to your survey.

To enter translated texts in Excel:

1. In Excel, open the **file** menu and click **open...**
2. In **files of type**, select **text files**. Select the file generated by askiatranslator and click **open**.
3. In the Text Import Wizard, click **Next**, then **Next** again, and finally **Finish**.
4. Each item of text is presented on a separate row, with each language in its own column. Enter the translated text for each language in the appropriate column.

To import the translated texts back into your project:



1. Start askiatranslator, and open your questionnaire.
2. In the **file** menu, click **import file for translation....** Select the text file and click **open**.
3. Click **save**. The translated texts are saved in your questionnaire.

Export to Word

It is possible to export your questionnaire as an RTF document, which can be opened in Word or other Word processing software. This can be used for conducting paper-based interviews, or for checking your questionnaire.

To export to Word:

1. In the **file** menu, select **export to Word**.
2. Specify a location for the RTF file and click **save**.
3. If you have *Word* installed on your computer, the file will open automatically.

Saving the QES with and without data

If you want to save your file without data, save it in QEX format. While QES files may contain data, while QEX files cannot, so any data will be cleared.

Recap

In this session, you have learned how to:



- Using libraries to re-use and share questions and response lists
- Work with local and global libraries

- Define additional interviewing languages
- Add a “choose your language” question to the start of your survey
- Extract texts for translation by an external translation agency
- Enter or Import language translations for the text of the survey
- Share the questionnaire with your client or project director by producing a Word version of the survey

Practical exercises

Exercise 1. Using the library

Please follow these steps:

1. Ensure you are in question mode.
2. Choose a chapter from your survey, and right-click it. In the pop-up menu, select **add to the local library...**
3. If you are asked whether you want to copy the routings or screens, answer **yes**.
4. Select a category into which you want to place the chapter. If there isn't an appropriate category already present, you can type one at the bottom of the dialog. Then, click **OK**.
-  5. Now let's practice inserting these questions into a different survey. Save your work, then, in the toolbar, click **new**. This creates a blank questionnaire.
-  6. In the question list, right-click anywhere and select **library**.
7. Select the category you just created.
8. Drag and drop the chapter you placed in the library into the question list in the left-hand pane. Then close the library window. Note that the chapter, and the questions within it, are now in the new questionnaire.
9. Now close the new questionnaire; there is no need to save it when you do so.

Exercise 2. Setting up a multi-lingual survey

Please follow these steps:


1. Re-open the survey you have been working on today; there is no need to save any changes to the survey we created to test the library, in the last exercise.
2. At the start of the survey, create a "language selection" question, as follows:

Which is your preferred language?

English
Français
Español
None of these

Set the question to single-coded. Call the question "*language*".

3. Switch to routing mode.
4. Create a new routing for the first language in the list, switching the respondent to the appropriate language. The **start question** should be *language*.

5. In the list of responses, select a language. In **action**, select **set language**, and in **language**, select the appropriate language.
6. Repeat steps 4 and 5 for each remaining language in the list.
-  7. Switch to question mode, and in the toolbar, click **languages**. Select French.
8. Select Q1, and enter the following question text:

Lequel de ces appareils utilisez-vous actuellement?

9. Now switch the language to Spanish, and enter the following question text for Q1:

¿Cuál de estos dispositivos se utilizan en realidad?

10. Save your work, then click **test the questionnaire** to view the result of the changes you have made.

3. Exporting to Word

Please follow these steps:

1. Ensure you are in question mode.
2. In the file menu, click export to Word.
3. Specify a location and filename for the RTF file, and click save. If Word is installed on your computer, the questionnaire should open automatically.

Session 108 **Advanced design considerations**

Outline

Topics

In this session, you will learn about:

- Customising screens and templates
- Edit options for individual screens
- Grid layout options
- Web controls and Response blocks
- Media files
- Working with Flash using Askia Design Controls (ADCs)

Learning outcomes

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

- Apply local changes to override the template settings
- Create a more customized appearance for web surveys
- Incorporate rich media into your survey, such as images, audio and movies
- Use ADC components to add interactivity and special effects to Web surveys

Material covered

Setting the overall screen appearance

Templates and screen groups

Setting the target environment

When generating your screens, you should ensure that the appropriate **target environment** is specified as the target interviewing environment, and for Web surveys, that the correct screen resolution and browser compatibility options are selected.

To specify Internet as the target interviewing environment:



1. In the toolbar, click **screen mode**.
2. In the left-hand pane, right-click the screen group containing your interviewing screens, and select **properties**.
3. Ensure you are viewing the **screen group** tab.
4. In the **target environment** frame, ensure that the appropriate interviewing modes (**internet**, **windows**, **paper**, etc.) are selected.
5. In **resolution** and **browser**, where appropriate, set the minimum screen resolution and web browsers you want to support.
6. Click **OK**.

Applying a template

It is possible to apply a template to a group of screens.

To apply a template to the screens in a group:

1. In the left-hand pane, right-click the screen group, and select **properties**.
2. In the **library templates** list, select the template you want to apply.
3. Click **OK**.
4. In the left-hand pane, right-click the screen group and select **generate**.
5. When you are asked to confirm click **yes**. Note that this will generate new screens, over-writing any changes you have made to individual screens.

Templates to use

Use the template **AskiaTemplate** (default) for screen generation. You can also use the template **AskiaTemplate1** to access specific internet design options.

Creating a new template

If you make any changes to the screen group properties, you save this as a new template. This can then be applied to future projects, saving you time, and ensuring a consistent look and feel between projects.

To save a new template:

1. In the left-hand pane, right-click the screen group, and select **properties**.
2. At the top of the screen, next to **library templates**, type a name for the new template.
3. Click **save**.



Setting global options

For web surveys, you can control how the interviewing screens will appear. Amongst other things, you can specify:

- custom HTML or JavaScript, for web surveys, which will appear within the head, body or footer areas of the interviewing screens;
- the images that will be used for navigation buttons;
- custom HTML, JavaScript or text to appear on special interviewing screens like the final page and the “out of quota” page.

These settings can be viewed and changed by selecting **internet options** in the **options** menu. For further information, please refer to the askiadesign Assistant.

Editing individual screens

Askiadesign allows you to move and re-size items on a screen. Screen may also be merged together so as to present question on the same screen.

You can also split a screen, to present questions on separate screens.

Placing text on a screen

Askiadesign allows you to place text wherever you like on a screen by creating a **label**.

To place a label on a screen:

1. Open the screen.
2. Right-click anywhere in the screen.
3. Select **insert label**.
4. Drag and drop the label into the desired position.
5. Click the label, then right-click and select **properties**.
6. Click the **general** tab.
7. In **caption**, type the text that you want to appear in the label.
8. Click **OK**.
9. Resize the label, by dragging the “handles” at its edges, as desired.

Laying out a loop as a grid in screen mode

You can define a loop to be displayed as a table by applying the question table styles.

To display a grid as a table:

1. Open the screen. Then, in the right-hand pane, right-click anywhere. In the context menu, click **select all**.
2. In the **layout** menu, select **styles**, then **vertical question table** or **horizontal question table**.

To change the orientation of a grid:

1. Open the screen containing the loop, and click the grid element.
2. Right-click and select **properties**.
3. Click the **response block** tab.
4. In **library templates**, select horizontal grid or vertical grid, as appropriate. Note that the selections in **rows** and **columns**, and **vertical loop** and **horizontal loop** change accordingly.
5. Click **OK**.

To present the grid rows on separate screens:

1. Click the grid element.
2. Right-click and select **styles**, then **classic responses**.

To present looped grid questions above or next to each other on a single screen:

1. Right-click on an empty area of the screen and select **properties**.
2. In **sub-form**, select **vertical sub-form** (for questions above each other) or **horizontal sub-form** (for questions next to each other).
3. Click **OK**.

Creating web controls: response blocks

Splitting response blocks into separate boxes

With most templates (for example “Askia Template”), grids are automatically set up as response blocks. This means that the responses are displayed together in one control. However, it is possible to split such a grid so that each response appears in an individual box on the screen.

To split a grid into separate boxes:

1. Open the screen and, in the right-hand pane, click any of the question’s responses.
2. Right-click, and click **select all controls of question**.
3. Right-click again, and select **styles**, then **classic responses**.

4. If required, you can change the order of the responses by dragging and dropping them. You can even cut and paste them onto separate screens.

Combining grid responses into a response block

If your template automatically places each response into separate boxes ("classic responses"), you might want to combine them into a single response block.

To combine a grid into a single response block:

1. Open the screen and, in the right-hand pane, click any of the question's responses.
2. Right-click, and click **select all controls of question**.
3. Right-click again, and select **styles**, then the appropriate style. **Response block** displays the responses one above the other in a single box. **Combo-box** displays them in a drop-down list.

You can define a loop to be displayed as a table within a response block.

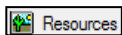
To display a loop as a table within a response block:

1. Right-click the response block and select **properties**.
2. Click the **response block** tab.
3. In **vertical loop** (for a vertical table) or **horizontal loop** (for a horizontal table) select the loop by its name.
4. If this is a vertical table, select 1 in **rows** and 0 in **columns**.
5. If this is a horizontal table, select 0 in **rows** and 1 in **columns**. In addition, select **horizontally first**.
6. Click **OK**.

Adding media files (images, sounds, etc.)

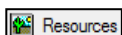
You can easily add images, or sound or video clips to your survey. Firstly, you need to add the media file to your survey's resources. Then, you can drag and drop the resource into one or more interviewing screens.

To add a multimedia file to the project resources:



1. At the bottom of the left-hand pane, click the **resources** tab.
2. In the left-hand pane, right-click and select **insert picture**, **insert sound file**, or **insert animation** (for a video clip) as appropriate.
3. Select your file, and click **open**. The file appears in the resources list:

To place a multimedia file onto an interviewing screen:



1. Open the interviewing screen.
2. At the bottom of the left-hand pane, click the **resources** tab.
3. Drag and drop the file from the *resources* tab onto the screen. If you drag the resource onto a blank area of the screen, this creates a new control. If you drop the resource onto an existing control, it is instead placed there.

4. If the file is an image or movie clip, you can resize it as appropriate.

Previewing and testing a Web interview

Viewing a screen preview



You can quickly view how the current screen will appear, including any multimedia content, by clicking **show a view of the screen** in the toolbar. When you click **stop**, or any of the navigation buttons at the bottom of the screen, the preview closes, and you are returned to screens mod

Testing the questionnaire in screen mode

At any time, you can preview your survey as it will appear in Internet Explorer; this is useful for testing surveys that will be deployed on the web, as it allows you to see what the respondent's screen will look like.

To view your survey in Internet Explorer:



1. In the toolbar, click **Internet explorer preview**.
2. Use the navigation buttons to move between screens:



3. To return to askiadesign, close the preview window.

AskiadesignControls

Askiadesign includes a library of Flash objects, known as **Askia Design Controls** (ADCs) that you can use to add rich content to your surveys. You can also create your own ADCs for use in your projects.

For more information on creating and integrating ADCs, please refer to https://dev.askia.com/projects/support/wiki/Flash_Objects_EN.

Using the built-in ADCs

To place an ADC from the library into your project:

1. Ensure you are in *screen mode*.
2. In the **screens** tab, open the screen into which you want to place the ADC, by double-clicking it.
3. Click the **resources** tab.
4. Drag and drop the ADC from the left-hand pane, into your screen. When you are asked if you want to create a control for the resource, click **yes**.
5. Set the properties for the ADC as appropriate.
6. Click **OK**.
7. Now, you need to hide the original response list. In the screen, click the response list, then right-click and select **properties**.
8. Click the **HTML** tab.

9. In **code in cell**, remove any text there and type:

`"style="display:none;"`

10. Click **OK**.

Recap

In this final module of this course, you have learned how to:

- Create and apply different target environments appropriate to the three different interviewing modes in Askia: Web, CATI and CAPI
- Apply local changes to override the template settings, and understand the relationship between local changes, local and global templates
- Create a more custom appearance for your Web surveys and save these as templates
- Work with images, audio and movies and video in your survey
- Add interactivity and special effects defined in flash by using applying controls (ADCs) from the library of pre-defined ADC components

Practical exercises

1. Converting a grid

(a) Converting a grid from classic questions into a response block

Please follow these steps:

1. Locate a grid question in your project (if you are using the mobile internet survey, use question Q13). Open the screen for this question by double-clicking it.
2. Click any of the question's responses.
3. Right-click, and click **select all controls of question**.
4. Right-click again, and select **styles**, then select **response block**. The responses are presented in a *response block*.
5. Now right-click the response block and select **properties**.
6. Click the **response block** tab.
7. In **vertical loop** select the loop by its name.
8. Select 1 in **rows** and 0 in **columns**.
9. Click **OK**.
10. Save your work, then click **test the questionnaire** to view the result of the changes you have made.

(b) Converting a grid from a response block into classic questions

Please follow these steps:

1. Locate a grid question in your project (if you are using the mobile internet survey, use question Q13). Open the screen for this question by double-clicking it.
2. Click any of the question's responses.
3. Right-click again, and select **styles**, then select **classic responses**. The responses are presented separately.
5. Now right-click the response block and select **properties**.
6. Save your work, then click **test the questionnaire** to view the result of the changes you have made.

2. Refining your survey's design

Please follow these steps:

1. Switch to *screen mode*, and in the left-hand pane, open the **screens** tab.

2. Click the screen group, then right-click the screen group and select **properties**. Click the **screen** tab, and experiment with changing some of the layout settings for the screen group.
3. Save your changes into a template (see the exercise on page 45 if you have forgotten how to do this).
4. Apply the template to your screens by generating the screens again (refer to page 45 for a reminder of how to do this).
5. Open the screen for a multi-coded question (if you are using the mobile internet survey, use Q1). Click the **resources** tab, and drag the control *statements* to the screen.
6. Now, hide the original response list. In the question screen, click the response list, then right-click it and select **properties**. In the **HTML** tab, enter the following text in code in cell (replacing any text currently there):

`style="display:none;`

Finally, click **OK**.

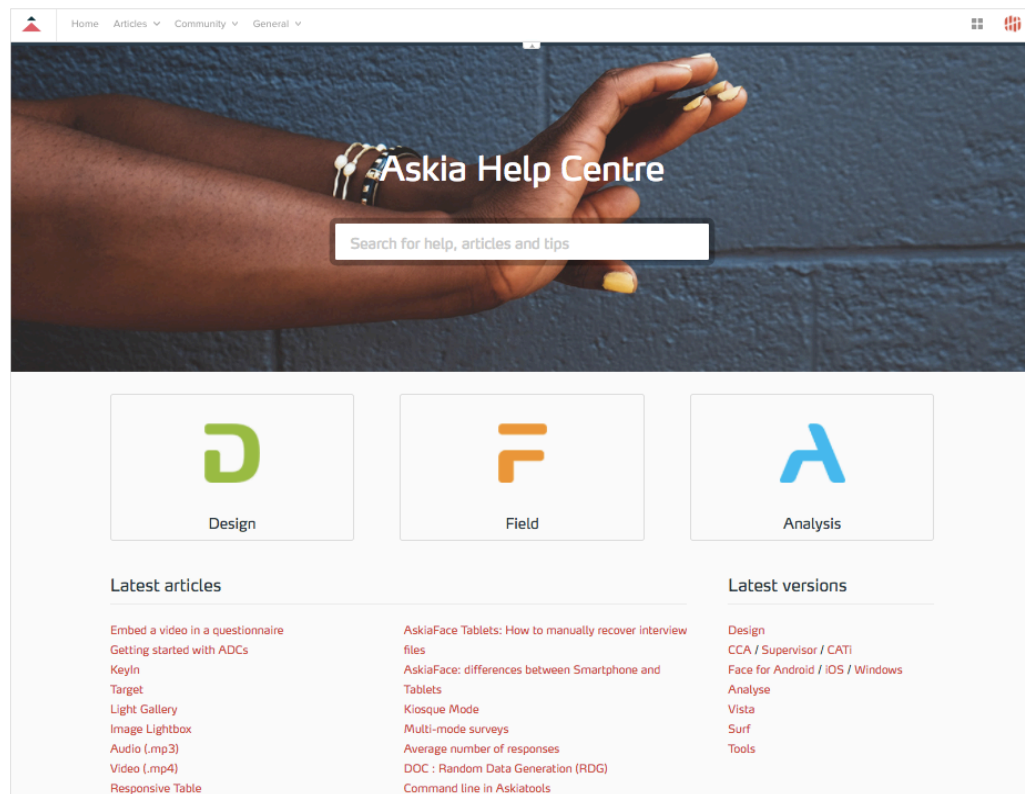
7. Select one or two screens from your questionnaire, and experiment with the layout options available to you:
 - re-position and re-size the items on the screens;
 - place custom text onto a screen;
 - try merging two screens and then splitting them again.
8. Save your work, then click **test the questionnaire** to view the result of the changes you have made.
9. Try the **Internet Explorer Preview**, which is used to see how respondents in a web survey will see the questionnaire.



Afterword

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

Appendix: "Mobile Internet" survey

INTRODUCTION

Thank you for agreeing to participate in this survey on mobile internet usage. It should take no more than ten minutes to complete this survey. We are carrying out this research on behalf of a smartphone and tablet computer manufacturer who wants to understand more about how people like you are using the Internet while on the move.

Please read through the questions carefully and give us as accurate answers as possible. All the information you provide will be treated in strictest confidence. We will not identify you individually to our client.

Q1. Which of these devices do you currently use?

1. Desktop computer
 2. Laptop computer
 3. Tablet computer including Apple iPad
 4. Smartphone
 5. None of these
- continue
- CLOSE

Thank and close if not code 3 or code 4 at Q1

"As our survey is about mobile internet usage, and you do not have a mobile device, we have no more questions for you. Thank you for your co-operation."

SMARTPHONE QUESTIONS

ONLY ASK SMARTPHONE QUESTIONS IF CODE 4 AT Q1

Q2. What kind of smartphone(s) do you currently use?

1. Apple iPhone
2. Android phone
3. Blackberry
4. Windows phone
5. Other
6. Don't know

Q3. What is the make and model of your smartphone? If you have more than one, please give the make and model of the one you use most.

Enter make and model _____

Q4. We will now ask you some questions about your [show make and model at Q3] What kind of mobile data contract do you have on your [Q3] smartphone?

1. Monthly recurring contract
2. Pay as you go

3. No mobile data contract – only use WiFi
4. Don't know

Q5. Which of these functions do you use on your [Q3]?

	Use a lot	Use a little	Don't use
Voice calls	1	2	3
SMS text	1	2	3
Taking photographs	1	2	3
Video calls	1	2	3
Playing games	1	2	3
Calendar	1	2	3
Listening to music	1	2	3
Accessing web sites	1	2	3
Listening to podcasts	1	2	3
Watching video	1	2	3
Alarm, including reminders	1	2	3
None of these	1	2	3

Q6. Which of these web-based activities have you engaged with from this smartphone...?

1. Maps and navigation
2. Checking Facebook, Twitter or other social media platforms
3. Obtaining train times, travel or traffic information
4. Online banking
5. Internet shopping for goods or items
6. Making travel or hotel bookings
7. Locating services near you, such as to find the nearest restaurant
8. Reading the news
9. None of these

Q7. You said you have used [show answers at Q6], which one of these do you do you think is the most useful to you?

1. Maps and navigation
2. Checking Facebook, Twitter or other social media platforms
3. Obtaining train times, travel or traffic information
4. Online banking
5. Internet shopping for goods or items
6. Making travel or hotel bookings
7. Locating services near you, such as to find the nearest restaurant
8. Reading the news
9. None of these

Q8. How many applications or apps have you added to your [Q3] (not including apps that were already provided, such as calendar, calculator etc)? If you do not know the exact amount, you may give an approximate figure.

Number of apps _____

Q9. Among the [0] apps you have on your phone, which one is your favourite?

Enter name of app _____

TABLET QUESTIONS**ONLY ASK TABLET QUESTIONS IF CODE 3 AT Q1****Q10. What kind of tablet(s) do you currently use?**

1. Apple iPad
2. Android tablet
3. Windows tablet
4. Other
5. Don't know

Q11. What is the make and model of your tablet. If you have more than one, please give the make and model of the one you use most.

Enter make and model _____

Q12. We will now ask some questions about your [show make/model at Q11]. What kind of mobile data contract do you have on your [Q11]?

1. Monthly recurring contract
2. Pay as you go
3. No mobile data contract – only use WiFi
4. Don't know

Q13. Which of these functions do you use on your [Q11]?

	Use a lot	Use a little	Don't use
Accessing web sites	1	2	3
Reading e-books	1	2	3
Listening to music	1	2	3
Listening to podcasts	1	2	3
Watching video	1	2	3
Taking photographs	1	2	3
Playing games	1	2	3
Creating documents or writing	1	2	3
None of these	1	2	3

Q14. Is there anything else you often use your [Q11] for, which we have not mentioned?

Q15. Which of these web-based activities have you engaged with from your [Q11]...?

1. Maps and navigation
2. Checking Facebook, Twitter or other social media platforms
3. Obtaining train times, travel or traffic information
4. Online banking
5. Internet shopping for goods or items
6. Making travel or hotel bookings
7. Locating services near you, such as to find the nearest restaurant
8. Reading the news
9. None of these

Q16. You said you have used [show answers at Q15], which one of these do you do you think is the most useful to you?

1. Maps and navigation
2. Checking Facebook, Twitter or other social media platforms
3. Obtaining train times, travel or traffic information
4. Online banking
5. Internet shopping for goods or items
6. Making travel or hotel bookings
7. Locating services near you, such as to find the nearest restaurant
8. Reading the news
9. None of these

Q17. How many applications or apps have you added to your [Q11] (not including apps that were already provided, such as calendar, calculator etc)? If you do not know the exact amount, you may give an approximate figure.

Number of apps _____

Q18. Among the [Q17] apps you have on your [Q11], which one is your favourite?

Enter name of app _____

LAPTOP QUESTIONS

ONLY ASK LAPTOP QUESTIONS IF CODE 2 AT Q1

Q19. What kind of laptop or laptops do you currently use?

1. Apple
2. Android
3. Windows
4. Other
5. Don't know

Q20. What is the make and model of your laptop. If you have more than one, please give the make and model of the one you use most.

Enter make and model (if known) _____

Q21. We will now ask some questions about your [show make and model from Q20]. Do you have any mobile data access from this laptop, or do you only use WiFi or your internet connection at home?

1. Data card inside laptop
2. Plug-in modem or dongle
3. Mobile phone tethering (uses mobile phone to get your laptop online)
4. WiFi or fixed line connection only
5. Don't know

Q22. Which of these functions are the three that you use most often on your Q20]?

	Use a lot	Use a little	Don't use
Accessing web sites	1	2	3
Reading e-books	1	2	3
Listening to music	1	2	3
Listening to podcasts	1	2	3
Watching video	1	2	3
Taking photographs	1	2	3
Playing games	1	2	3
Creating documents or writing	1	2	3
None of these	1	2	3

Q23. Is there anything else you often use your [Q20 for, which we have not mentioned?

Q24. Which of these web-based activities have you engaged with from your [Q20]...?

1. Maps and navigation
2. Checking Facebook, Twitter or other social media platforms
3. Obtaining train times, travel or traffic information
4. Online banking
5. Internet shopping for goods or items
6. Making travel or hotel bookings
7. Locating services near you, such as to find the nearest restaurant
8. Reading the news
9. None of these

CLASSIFICATION

Q25. Now some questions about you. First, are you:

1. Male
2. Female

Q26. What is your age?

1. 16-17,
2. 18-24
3. 25-34
4. 35-44
5. 45-54
6. 55-64
7. 65-74
8. 75 or over
9. Prefer not to say

Q27. What is your level of education?

1. High school
2. Technical or vocational qualifications

3. University degree
4. Postgraduate
5. Masters or PhD

Q28. What is your annual income?

1. Under 10,000
2. 10,000-19,999
3. 20,000-39,999
4. 40,000-59,999
5. 60,000-79,999
6. 80,000-99,999
7. 100,000 or above
8. Prefer not to say

Q29. Which of these best describes your working status?

1. Working full time (30 or more hours per week)
2. Working part time (less than 30 hours per week)
3. Full-time duties at home as home maker or carer
4. In full time education
5. Not working but seeking work
6. Not able to work
7. Retired

**Q30. In case we need to contact you again, can use this email address to contact you, or should we use a different email address?
[display email address]**

We will only use this to contact you in relation to this survey and not for any other purpose.

1. Use this email address
2. I will give you a different email address

Skip to close message
> Q31

Q31. Please enter your alternative email address

We are pleased to say, that concludes our survey. We very much appreciate your time and effort in providing us with your answers. Thank you again.