Askia Training

Course 100

Askia Design introductory training

Participant's Coursebook

With Tutor's Notes

Contents

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.

Preparation

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

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

Course agenda and timetable

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

You should add these timings to the introductory PowerPoint, as well as providing it by email or on paper.

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

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

Example project

This course uses two different projects. It use 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.

Example questionnaires

This course uses two different questionnaires:

Credit Card Survey	Example questionnaire for use by the tutor; examples from this questionnaire appear in the Tutor's Guide and the Participants' Coursebook. This survey can be used for the tutor for demonstrating and answering any questions from course participants during the course.
Mobile Internet Survey	Survey created for course participants to use in each end-of-module exercise. It is referred to in the Participants' Coursebook, and relevant sections are addressed in each exercise. A printed version of this survey can be found in the appendix at the end of this coursebook.

This survey should not be used by the tutor, unless directly answering questions that relate to the practical exercises.

Documents and files provided

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

credit card survey.doc	Word file of the tutor's example survey
askia-creditcards.qex	Askia QEX file containing the Tutor's credit card survey
mobile internet survey.doc	Word file of the participants' example survey used throughout the practical exercises (note that the printed survey is also available at the back of this coursebook)

Working with a client-provided questionnaire

Generally, we do not recommend using a client questionnaire for this introductory course. This is because the example questionnaire (Mobile Internet) has been specifically created with the demands of each practical exercise in mind. Any client-supplied questionnaire is very likely to suffer from these three disadvantages that will inhibit learning and add complexity to the training experience:

- It may not contain examples of all of the facilities and operations covered in this course
- It may include extraneous material not covered in the course, forcing the tutor to spend time teaching ad hoc material, before all the basic concepts have been grasped
- It may be needlessly repetitive, requiring omissions to be made in order to keep the practical sessions to time

Where the client requests that their own questionnaire is used during the training, our recommendation is that this survey is then set up as a second exercise *after* the core training has been completed.

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

At the start of the training

Setting up the room

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

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

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

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

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

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

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

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

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

Introductory presentation

Before you start the main training you should:

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

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

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

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

Explain the materials and resources they will be using:

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

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

Check that everyone has the materials and resources they need

Ask if there are any questions

Continue on to Session 101

Checklists

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

During preparation

- ☐ Discuss course timings and participants with client and agree schedule
- ☐ Update agenda and timings in training course PowerPoint
- ☐ Discuss the example projects with client (you can forward the Word files) and review whether additional time should be allowed after the course to work on a "real" project.
- ☐ Obtain the example project and work through which questions and examples will be used in each exercise (see content checklist, above)
- ☐ If necessary, where no QEX file exists, import the survey and/or program those parts needed for the exercises to work.
- ☐ Agree who will print and bind the coursebooks for participants (double-sided and bound or in a folder is the preferred presentation)
- ☐ Ensure that there are printed copies of the Mobile Internet survey, for use by participants during the exercises.
- ☐ If you are covering askia**word**, ensure that participants will have access to the askia**word** version of the Mobile Internet survey, with the questions

and responses already marked up, so that they can open it quickly in Word.

- ☐ Prepare and print any supplementary notes – agenda, example project info, etc.
- ☐ Sort out access to the system, server etc at the client company – will you be using their PC or yours?
- ☐ Establish who will be able to update the IE settings on participant's PCs to access askiavista.
- ☐ Check the training room will have a large screen or projector you can use; Internet access for you to use; whiteboard or flipchart and pens
- ☐ Check there will be one PC for each participant or each pair of participants
- ☐ If you are not familiar with the system configuration and how Askia is deployed, check with the Askia team member responsible for the set-up, or with your client. Verify, in particular, where/how askiavista is deployed, and if projects are stored in SQL.
- ☐ Check any other arrangements with your client contact immediately before your visit – explain that you would like to have access to the room at least 30 minutes before your first session begins, in order to get it ready.

Using an alternative project for participant exercises

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

- ☐ Two single-coded questions.
- ☐ Two multi-coded questions, preferably with at least one including an other (specify) type response.
- ☐ An open text question.
- ☐ An open numeric question.
- ☐ A grid.
- ☐ Chapters (if not present in study provided, you can add these in as appropriate).
- ☐ Demographic questions.
- ☐ A structure where respondents might skip at least one question, depending on earlier answer/s given.
- ☐ Also ensure that:
- ☐ you have a version of this study in Microsoft Word format;
- ☐ you have marked it up in askia**word**, leaving a few questions for the participants to mark up for themselves;
- ☐ participants will have access to an electronic copy of the marked-up file, so that they can open it in Word;
- ☐ you have printed copies to give to the students for use during the exercises.

On the day

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

Software update, if required

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

Session 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:

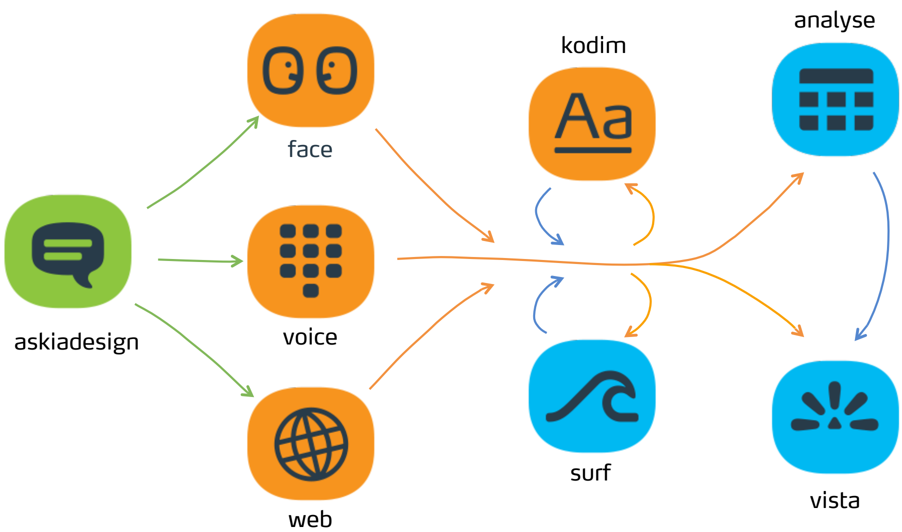
- Open an existing survey QEX file

Tutorial

How askia works

The modules of the software

→ Show PowerPoint slide 3 in course100.ppt



→ Explain that there are three complementary modules involved in data collection: askia **voice** for CATI and askia **face** for CAPI and askia **web** for online surveys

→ Explain that askia**design** is used to prepare surveys for execution in any of these fieldwork modes

→ Explain that it is possible to create one survey to execute in all three data collection modes, though most surveys only use one mode

→ Explain which mode you will be using for the majority of your examples and also for participants to focus on when writing their example survey during the practical sessions.

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**.

→ You should open the software but not have any project open. If the left pane shows a project, close it before proceeding.

Briefly describe the screen layout before you have opened a file.

The left-hand pane is for navigation (question list, search, etc.); right-hand pane is for question definition.

Opening a QEX file.

→ Open the file *askia-creditcards.QEX.* This is the **Askia Credit Cards Survey**.

Two-minute walk-though

Before you start, please check:

☐ Askia software window is maximised (full-screen)

→ Start the training with a quick tour of the Credit Card demo survey with the aim of showing that the software is simple and productive to use, and giving participants a good overview without getting into the detail. (Explain you will go back though this in more detail).

→ Keep this intro short and focused on these steps:

- Start the software and open up askia**design**
- Open the file *askia-creditcards.QEX.* This is the **Askia Credit Cards study**.
- Show the texts of the questions and of the answers
- Show the preview of the question

→ Mention askiatranslator in this session – used for translations – and that it will be covered later.

Recap

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

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

Tutorial

Creating a new questionnaire

→ Demonstrate 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

How to add a new question: a single-coded question.

The simplest type of question, which requires one and only one response to be selected from a list of possible answers.

Defining a single question requires:

Choosing a unique name for the question

Entering the text of the question

Entering a list of possible responses

→ Add a question with responses, as follows:

Q1. Do you have any credit cards or other payment cards such as debit cards, charge cards, store cards or similar?

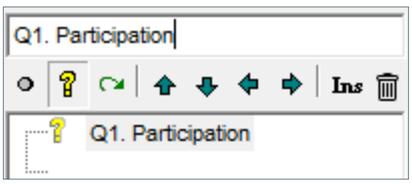
Yes
No

→ Call the question "Q1 – Have cards".

Notes for participants

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

How to add or remove a "don't know" response to the question.

Cover the importance of adding a "don't know" response to questions where respondents are not always going to know the answer – otherwise the respondent will not be able to continue with the survey without inventing an answer in order to move beyond the question.

→ Ensure that Q1 does *not* have a "don't know" response (by clearing the setting **allow DK**).Explain the option (in **options**->**settings**) "**allow DK by default**". This controls whether allow DK is on by default for new questions.

■ Notes for participants

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

Cover the importance of using question names which are meaningful both to the survey writer and to anyone else that will work on the survey, such as anyone performing data analysis.

→ Explain that you should try to give questions names which include both the question reference and also a descriptive, as just done with "Q1 – Have cards".

Saving your work

Cover the importance of saving your work, so that changes are committed to disk

→ Show how to save your work.

Notes for participants

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

Multi-coded questions

Explain how to add multi-coded question.

Explain how multiple questions are similar to single questions in presenting a list of answers, so these too have a name, a question text and a list of answers.

Explain how multi-coded questions differ from single coded questions in allowing a respondent to select more than one answer.

→ Add a question with responses, as follows:

Q2. Do you have cards that belong to any of these payment services groups?

Amex/American Express
Discover
Diners' Club
Mastercard
VISA

→ Give the question the name "Q2 – Networks used"

→ Explain your choice of name, to encourage them to use this naming convention.

Notes for participants

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:

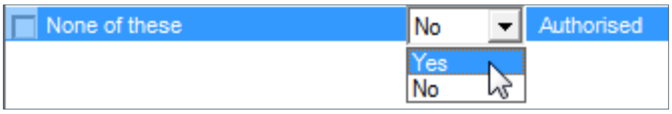
Ordered responses	If this option is selected, askia will record the order in which the responses were selected by the interviewer or respondent during the interview. This applies in all interviewing modes (Web, CATI and CAPI).
Number of responses	This determines the maximum number of responses that may 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”)

→ Add a “none of these” response to Q2.

→ Set this response’s **exclusive** setting to **yes**.

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**:



Questions and variables

→ Explain the following:

Many people will call questions “variables”. A variable is the name used to refer to something that can hold data for later analysis. Every question can be considered to be a variable. There are some additional variables which are not presented as questions but which Askia will also collect as data and which can also be analysed later, such as the date and time the interview took place.

Some people will refer to questions when designing a survey, and variables when analysing it, but the two terms are largely interchangeable.

Recap

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

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

→ Ask participants to complete this 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 do 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

Tutorial

→ Not all users will have askia**word** installed but they should be aware of the capability. Therefore, the tutor should cover both method A (askia**word**) and method B (copy and paste). Participants can complete exercises on either method at the end of the session, according to which methods they will be using.

Using askiaword to import text from Word (Method A)

Many questionnaires originate in Word, and it can save a lot of time if you can copy the text over from Word into askia**design** without having to retype the text.

→ Save any changes to your questionnaire.

→ Explain that we can use a Word add-in called askia**word** to create questionnaires in Word.

→ Open the questionnaire *Credit Card Survey.docx* in Word, and show how to mark up questions in this format.

→ Use the option **open in design** to import the questionnaire into askia**design**.

■ Notes for participants

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)

→ Open the questionnaire *Credit Card Survey.docx* in Word

→ Open up your demo survey from the previous session, and demonstrate using Word copy/paste to set up the next few questions (i.e. Q5 onwards).

■ Notes for participants

It is also possible to copy and paste questions and chapters from Word. While this is not as quick as using askiaword (descrbed 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

If a question has already been defined in another survey, or just the answers that you need to use, you can copy the question or the response list from the existing survey to your new survey. This will save time and improve accuracy and consistency.

→ Open the full credit card survey that you just imported from Word.

→ Copy across Q17 into your survey.

→ Select "allow don't know".

→ Explain that you have selected "allow don't know" because you to allow this on this occasion. Remind participants that in most cases you would not allow a default non-response.

■ Notes for participants

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

→ For Q17, set **number of responses** to *3*.

■ **Notes for participants**

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)

→ Add an “other (specify)” category to Q17 by selecting the option **semi-open responses**.

→ Explain that this method provides a convenient way of creating an open answer within a question for questions where the answer list is very unlikely to change and where the answers are going to be very simple short responses such as a brand name.

→ Explain that you will be covering a second method for handling “Other (specify)” questions during module 105, which is more widely used.

■ **Notes for participants**

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

→ Add the following single-coded question:

Q12. Are you satisfied with the minimum amount you are asked to pay each month?

I think it is too much
I think it is about right
I think it is too little and would prefer to pay more

Not sure

→ Select the option **scaled responses**.

→ In the value column, enter the values 1, 0 and -1 for the responses.

→ Move Q12 to its correct place in the questionnaire running order.

■ Notes for participants

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
Very good	2
Good	1
Saisfactory	0
Poor	-1
Very poor	-2

Additional question types

Other question types are used to collect different kinds of data, such as numeric data, text data and calendar dates.

Numeric question

Numeric questions are used to collect numbers, such as monetary amounts or quantities.

→ Add the following question and set its type to **numeric**:

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

→ Move Q11 to its correct place, above Q12.

Open question

Open questions are used to collect textual responses: either short text responses such as name and address or longer responses such as a reason or opinion given.

→ Add the following question and set its type to **open**:

Q25. Please enter your alternative email address.

Date question

Date questions are a specific question type for collecting calendar dates.

→ There is no date question in either example surveys. Instead, create the following question, which you can remove afterwards:

What is your date of birth?

Summary for participants

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.

Type	*Purpose*	*Example uses*
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.

→ Add the following question to the **end** of the survey:

Q3. How often do you use a credit card or payment card to pay for goods or services, instead of using cash?

On most days
Several times a week
About once a week
Several times a month
About once a month or less often
It varies

→ Move Q3 to its correct place, below Q2.

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.

→ Delete Q3.

→ Use **undo** to restore Q3 to the questionnaire.

Creating Chapters

→ Paste in questions 5-12 from the complete survey file.

→ Create a chapter called ACCOUNT BILLING AND PAYMENTS.

→ Ensure **pause during data entry** is switched off, so the chapter text is not displayed during interviews.

→ Place questions 5-12 into it.

Using chapters to display information screens

→ Create a chapter called Introduction, and use it to display an information screen, as follows:

→ Move the chapter to the start of the questionnaire.

→ Select **pause during data entry** and explain that this, when selected, causes the chapter text to be displayed during the interview.

■ Notes for participants

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

→ Demonstrate switching between Question and Screen modes.

→ Explain that Routing will be covered in the next session

Notes for participants

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

→ Explain the importance of testing

→ Test the questionnaire, and show how to navigate using the test mode.

→ Explain that at the moment, none of the routing will work, as we have not yet defined any.

Notes for participants

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

→ Demonstrate the difference in these two options or when neither is active by applying each option in turn then returning to test mode to see the effect.

→ Also explain (or demonstrate) that when a chapter is defined with neither of these options, it is invisible during data collection

Notes for participants

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

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

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

→ Ask participants to complete the relevant exercises. The first exercise (importing from Word using **askia**word) is optional should be omitted if askia**word** is not installed. All participants should complete all the subsequent 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

Tutorial

Sharing response lists

Explain that where two or more questions have the same list of answers, the response list can be shared between those questions.

→ Add the following question:

Q15 If a retailer told you in the store that you would pay a small surcharge to pay by credit card instead of another payment, would you:

Always use another payment method
Use the credit card anyway
Look at the surcharge then decide
Not sure

→ Now add the following question:

Q16 And if a retailer told you on a website that you would pay a small surcharge to pay by credit card instead of another payment, would you:

→ Make this a closed question, and link the response list ("all responses") to Q15.

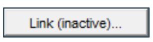
→ Test the survey to show that Q16 has picked up the response list from Q15.

Notes for participants

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**.

Masking

→ There is a series of PowerPoint slides in the deck for this module that you can use to illustrate masking.

Notes for participants

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

→ Explain the following:

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

→ Add the following question:

Q4a Which of these types of payment card have you ever used…

Credit card
Debit card
Charge card
Store cards
Pre-paid cards
None of these

→ Now add the following two questions, which have the same list of answers as Q4a:

Q4b Which of these have you used in the past year…

Q4c Which of these have you held in the past, but no longer hold…

→ Make both of these closed questions

→ At Q4b, link the response list with the option “all selected responses” to Q4a.

→ At Q4c, link the response list with the option “all non selected responses” to Q4a.

→ Test the survey to show that the responses made at Q4a now control what is presented at Q4b and Q4c.

Notes for participants

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.

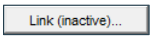
However, the link type is different for Q4b and Q4c.

- 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:

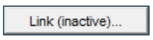
1. If you are not already in *question mode*, click **question mode** in the toolbar.
2. In the left-hand pane, select the second question – i.e. the one that will display the selected answers from the other question (in our example Q4b).



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**.

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.

Rotating and randomising

→ There is are several **PowerPoint slides** in the deck for this module that you can use to illustrate randomisation and rotation.

Introduction

→ Explain to participants

- Randomisation or rotation is often required in survey design to reduce ‘order bias’ which can mean that questions or answers receive more responses simply because they are presented first, or last, or always appear next to another item they may be closely associated with (e.g. a major competitor).
- Rotation or randomisation can be applied at three levels: answers or response lists, questions – a series of questions, and finally, to whole sections of a questionnaire containing groups or blocks of questions. And the techniques can be combined too, so that randomisation is applied at several different levels.
- With rotation, Askia randomly selects the first question or answer to be presented, and then all the other questions or answers will follow in the normal order you have defined.

Rotating and randomising response lists

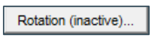
→ Randomise the response lists for Q4a, Q4b and Q4c.

→ Change the setting in the **rotation** column to **fixed** for the “none of these” response for these questions.

Notes for participants

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**.

Fixing items in a randomised list

→ Randomise the response list for Q2.

→ Show how to fix the “none of these” response in place (change the setting in the **rotation** column to **fixed**).

→ Explain the **always follow previous** option. This allows sub-brands within a brand list to stay together (e.g. coke, coke light, coke zero stay together).

Notes for participants

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

Explain that text substitution is often used to show the answer to a previous question.

→ Add the following question:

Q7. We would now like to ask you some questions just about the credit card you use most often. What is the name of this card?

→ Explain that Q7 also contains some text substitution, but as this is more complex, you will start with a simplified example and show how to do the rest of this the next session (105)

→ Make Q7 open-ended.

→ Add the following question:

Q8. What level of payment do you usually make each month on your [Q7] card?

* Pay the minimum payment amount shown on the statement
* Pay more than the minimum amount but less than the full amount
* Pay the full amount and clear the outstanding balance to zero
* It varies
* I was unable to make the minimum payment
* Prefer not to say

→ Arrange the two new questions into the proper place in the questionnaire.

→ Test the survey to show that Q8 displays the response given to Q7. Explain that this applies to all question types, not just open-ended responses.

Notes for participants

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)

Explain that loops can be used effectively to reproduce a grid question in Askia

→ Add the following question as a loop, where “usually, sometimes” etc. form the response list:

Q13 We would now like to ask you about the kinds of items you use a credit card to pay for – and we are continuing to talk about credit cards, store cards or charge cards where you receive one bill each month, rather than debit cards.

For each item, please say how likely you are to use a credit card to make this kind of payment.

	Usually use a credit card	Sometimes use a credit card	Never use a credit card	Don’t buy
Travel, such as plane tickets or train tickets	1	2	3	4
Hotel accommodations	1	2	3	4
Entertainment, such as tickets for movies, shows, sporting events	1	2	3	4
Your mobile phone account	1	2	3	4
Utilities such as gas, electricity or water	1	2	3	4
Your normal daily or weekly grocery shopping	1	2	3	4
Goods and services bought on the Internet	1	2	3	4
Donations to charities or good causes	1	2	3	4
Your annual tax bill	1	2	3	4

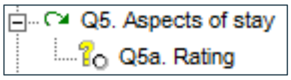
→ Test the questionnaire, to show how the loop works.

Notes for participants

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

Randomising a loop

→ Randomise the order of questions presented in Q13.

→ Set up Q14:

Q14. Are there any of these items you would prefer to pay for with a debit card rather than a credit card?

→ Link the response list to Q13. Explain that you will, for the purpose of this session, ignore the instruction that says *Exclude "Don't Buy" at each answer*. (See footnote[1])

→ Allow multi-coded responses.

→ Randomise the response order, and explain the **seed** function (to ensure the responses are presented in the same randomised order for a given respondent).

Using seeds to apply the same random order

Demonstrate setting a common seed value for several randomised response lists or questions and chapters.

→ Set the **seed** for Q14 to 1, and do the same for Q13.

→ Demonstrate applying another **seed** to Q4a, Q4b and Q4c.

→ Explain that this will only apply if the responses lists have identical lengths. However, we can create dummy responses to make the lists the same. These can then be hidden using routing logic, which will be covered in the next session.

Setting a seed value across several rotations or randomisations to force Askia to use the same randomised sequence when presenting these items – so that the respondent will always see these items in presented in the same order. Across the sample, however, the order will change from one respondent to the next.

■ Notes for participants

Askiadesign can ensure that randomised blocks of questions, or randomised response lists, will always use the same random sequence for a given respondent. This is achieved by setting an identical **seed value** for each of the randomisations that need to appear in the same order.

---

[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

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

→ Explain the following:

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

→ Explain that the order of questions within a chapter can be randomised. We'll demonstrate this on one of our chapters just to show the concept.

→ Demonstrate this by setting randomisation on the chapter ACCOUNT BILLING AND PAYMENTS. We don't really want this chapter to be randomised, but this is a good way to show the concept working.

→ Test the survey, to show the random question order

→ Explain that **seed** can be used here, to ensure the same question order across different randomised blocks. The chapters have to contain identical numbers of questions, but you can create dummy questions, and use routing to hide them – this will be explained in the next session.

→ Remove the randomisation on the chapter.

Notes for participants

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.

Link (inactive)...

4. Click **rotation**. The *rotation* dialog appears.
5. Select **randomise the order** or **rotate the order** as appropriate.
6. Click **OK**.

Questionnaire versions

→ Explain how Design keeps a log of changes

→ Show the revision history .

Notes for participants

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

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

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

→ Ask the participants to complete the relevant part of this 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

Tutorial

Routing

→ Show slides in PowerPoint presentation for session 105.

Explain that routing defines the pathway that a respondent will follow through the questionnaire, according to previous answers given. Some people also refer to routing as "skip patterns" or "skip logic.

■ **Notes for participants**

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 routing mode, define a routing for Q1, so that if the respondent answers "no", they are taken to the end of the interview ("go to" and "{end}").

→ Test the survey, to demonstrate this working.

■ **Notes for participants**

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

→ Show the following example on screen or point participants to it in the course book.

Notes for participants

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

Method 1: Using “Go To”

→ In routing mode, define a routing for Q5, so that if the respondent answers “no”, at Q5, they skip Q6 and go to Q7 – using “Go to” as the action.

→ Test the survey, to demonstrate this working.

Method 2: Using “Do not ask”

→ Go back to the routing just defined, and change the routing action from “Go to” to “Do not ask” and change the target from Q7 to Q6.

→ Explain that using “Do not ask” can be clearer and easier to understand than using “Go to”.

Method 3: Using “Only ask if”

→ Go back to the routing just defined, and change the routing action from “Do not ask” to “Only ask if” and keep the target set to Q6.

→ Explain that using “Only ask if” can also be clearer and easier to understand than using “Go to”, and whether you use “Only ask if” or “Do not ask” is a matter of using which seems clearer at the time.

"Do not ask" actions and chapters

→ If time permits, show how to set up the routing on a chapter by creating a routing around the chapter "Account Billing and payments" (Q5-12).

→ If time is short, open up the completed demo survey *Askia Credit Cards.que* and step through the routing applied after Q4 to the "Account Billing and payments" chapter.

■ Notes for participants

The "Do not ask" routing action can also be applied to whole chapters. This then means that 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

→ Explain that when setting up an "other (specify)" question, we should use routing to ensure that it is only presented to the respondent if the appropriate response was selected in the associated question.

→ Create an open text question for Q17, and call it *Q17open*. In routing mode, define a routing for Q17, so that if the respondent does not answer "other reasons", Q17open is set to "do not ask".

→ Remove the "Semi-open" option from the original Q17 answer.

→ Test the survey, to demonstrate this working.

■ Notes for participants

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 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

→ Explain the differences between routed open and semi-open questions, which are as follows.

Notes for participants

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.

→ Explain that there is a Knowledgbase article that compares the capabilities of Semi-open and routed open questions for handling "Other (Specify)" responses.

Notes for participants

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

→ Explain that another action available from a routing is to show a message. For example, you could present a validation error message or a warning.

There is an option available when you define a message that turns it into a **Blocking message**. This will prevent the respondent from continuing any further, so long as the routing condition defined remains true.

Blocking messages are an effective way to perform additional validation checks where you wish the interviewer (in CATI and CAPI) or the respondent (in self-completion surveys) to go back and make a correction before continuing.

→ Ask course participants to look at Q10 and Q11 for an example requiring a blocking message

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 ________________

→ Explain that the answer to Q11 should never be zero if the respondent has selected answer 4.

→ Create a blocking message for Q11:

→ select none, then select response 4 to the question;

→ in action, select show message.

→ Select blocking message, and in the text box enter: 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 is zero. Please go back and change the answer to either the last question or the one before that")

→ Explain that for CAWI projects, show message only works if selected as a blocking message; also, the start question needs to be visible.

→ Test the survey to demonstrate the effect of the blocking message

→ Go back and change the zero at Q11 to some positive value, and show that message no longer appears.

→ Uncheck the Blocking message checkbox

Notes for participants

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

→ Explain that in the last example used, that you may choose not to make this a blocking message, simply a warning, if you think it is possible that the balance is zero because the respondent has paid it off since the last statement.

→ De-select the Blocking message checkbox

→ Demonstrate this in test mode again, chosing answer 4 at Q10 then entering zero at Q11.

Notes for participants

By defining a message and not selecting (or de-selecting) Blocking message, your 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

Hiding dummy items

→ Explain that in the last session we talked about using dummy responses or questions to ensure that randomised lists have the same number of items. We can hide the dummy items using routing.

→ Explain that you can use a special kind of routing – either **ignore responses** or **make question invisible** – to hide the items. We won't go into this today, but it is covered in the student coursebook.

Notes for participants

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:

Ins

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

■ **Notes for participants**

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

→ Explain that conditions, or 'if logic' can also be applied to text substitution.

→ Type or paste in the additional text to Q7, so that it appears thus:

Q7. We would now like to ask you some questions just about the credit card [if Q5.1: "you use most often"; if Q6.1: "with the largest balance outstanding"; if Q6.1 "that you used most recently"] What is the name of this card? "that you used most recently"] What is the name of this card?

→ Explain the need to vary the text according to the conditions. Explain that this is not askia syntax yet – merely the instructions provided by the researcher that wrote the questionnaire.

→ Now convert the logic into askia text substitution logic:

■ Notes for participants

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

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

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

→ Ask the participants to complete this 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

Tutorial

Before you start, please check:

☐ You have downloaded and installed the latest version of Askia with the latest templates

Automatically generating screens

→ Switch to **screen mode**, and generate screens for the questionnaire.

→ Switch to the **screens** tab, and show some of the screens.

■ **Notes for participants**

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

Describe the importance of testing the survey with screens generated.

Using the library

→ In the toolbar, click **library management** to open the library settings.

→ Explain the concept of a **global library**, which is shared by co-workers, as opposed to the **local library**, which is just accessible to one computer. Use the local library in this example; we'll explain how to create a global library in session 107.

→ Explain that you can specify the file path and location for these here.

→ Talk about the "biblio.bib" files can be shared between co-workers (you can replace your own file with one given to you by a colleague).

→ Show that in the **internet** tab, you can specify the default internet settings; right-click a template and choose **set default**.

→ Show that in the **generation** tab, you can specify the default screen generation template; right-click it, and choose **set default**.

■ **Notes for participants**

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 72, 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

→ Explain that there are two ways to test the survey in screen mode: for CATI and Web.

→ Demonstrate using the Internet Explorer preview (for Web).

→ Demonstrate testing the survey for CATI.

■ **Notes for participants**

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

→ Open the properties for the screen group, choose a different template and apply it.

→ Use the template **AskiaTemplate1** for internet options and **AskiaTemplate** (default) for screen generation.

→ Re-generate the screens (right-click the group and select **generate**), and show some of them.

→ Explain the importance of selecting the right template for that interviewing mode or the style of the survey.

■ Notes for participants

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

Editing a template and saving it as a new one

→ Open the screen group properties, and make changes to the settings (background colour, question fonts, etc.).

→ Save this as a new template: choose a sensible name for it.

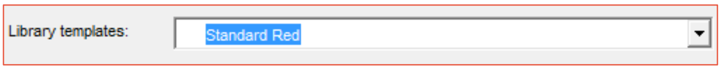
→ Generate the screens again, and show this.

Notes for participants

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:



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

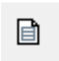
Practical exercise

→ Ask the students to complete this exercise.

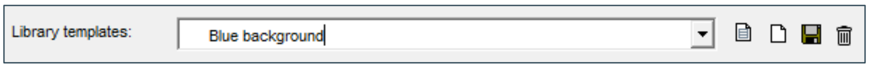
Working with templates

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:



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

Tutorial

Using libraries to re-use and share questions

Using a library to re-use questions

→ In **question mode**, add the question Q2 to the local library. Add the question to the category **payment services** (explain how to add to an existing category or create a new one).

→ Demonstrate opening the library and dragging a question into the questionnaire.

Notes for participants

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.

Using the global library to share questions

→ Show how to define a global library (using *the library management* dialog, accessed from the **edit** menu).

→ Add the question Q2 to the global library.

Notes for participants

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.

→ Explain that there are three stages to creating a multi-lingual questionnaire:

- Declare the languages you will be using;
- Add a "select language" question to the survey;
- Add the translations for each text in the survey.

Declaring the languages

→ Use the *languages* dialog to add the Spanish language to the survey.

→ Explain that there is a default language, which will be used during interviewing in the case of missing translated texts. The default should not be changes once questions have been defined in the survey.

■ Notes for participants

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

→ Use the *languages* dialog to add the French and Spanish languages to the survey.

→ Add a new question, LANGUAGE, to the survey:

LANGUAGE. What is your primary language? English Español Français None of these

→ Move this question so it is first in the running order.

→ Add routings to the questionnaire, so that the appropriate language is set (English, French, or Spanish) in response to the LANGUAGE question.

Notes for participants

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

→ Explain that you can enter translated texts in two main ways:

- By importing an Excel file from an external translation agency, using askiatranslator.
- By typing texts directly in askiadesign. This is useful for making minor changes and corrections to translations.

Adding translations directly in askiadesign.

→ Translate the question Q1 as follows:

French text:

Vous avez toute les cartes de crédit ou autre paiement cartes comme les cartes de débit, cartes, stockent des cartes ou similaire ?

Oui
Non

Spanish text:

¿Tiene usted alguna tarjeta de crédito u otras tarjetas de pago como las tarjetas de débito, tarjetas de crédito, tarjetas de tiendas o similares?

Sí
No

→ Test the survey, and demonstrate what happens when you select different languages.

Importing translations from an external agency

→ Demonstrate:

- using askiatranslator to export an Excel file;
- how the translator enters texts in Excel;
- importing the translator's file back into askiatranslator.

■ Notes for participants

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:

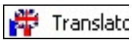
1. In the toolbar, click **languages**.
2. Select the appropriate language, and click **OK**. The status bar at the bottom right of the screen displays the current language.
3. Replace the text in the questionnaire with the translated text.

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:



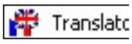
1. Start askiatranslator.
2. In the **file** menu, click **open…**, and select your questionnaire. Note that you can also enter translated texts directly in askiatranslator, by typing the translated text into the appropriate column.
3. In the **file** menu, click **export text file for translation…**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

→ Demonstrate exporting the questionnaire to Word, and show the exported questionnaire.

Notes for participants

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

→ Explain that when you use **save as** to save your questionnaire to a new location or file name, data is *not* saved with it. If you want to save a questionnaire and include the data, you will need to copy the QES file in Windows Explorer.

Notes for participants

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 cleated.

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

→ Ask the students to complete these 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

Tutorial

Before you start, please check:

- ☐ You have downloaded and installed the latest version of Askia with the latest templates
- ☐ You have one or more example media files, with at least one image and one video clip available for you to use

Setting the overall screen appearance

Templates and screen groups

Customising screens and templates

→ Explain the concept of the **target environment** for your surveys, and how to set it (**screen mode** – **screen group properties** – **screen group tab** – **target environment** options). Show how to set the interviewing mode (internet, windows, etc.) and the screen resolution, browser etc. for web surveys.

→ Show some of the things you can change in the properties of an **individual screen** (colours, font size, header, footer, navigation buttons, etc.).

→ Then, show the similar properties for a **screen group**.

→ *Explain that the group properties affect all of the screens in that group, but changes made to individual screen settings (or changes made to elements on a screen) over-ride those for the group.*

→ *Explain that if you make changes, it is useful to save this to a template. You can then apply this template to future projects, and don't then need to keep repeating the same work.*

→ *Show how to save a new template, and then show how this can be applied to a screen group.*

■ **Notes for participants**

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

■ Notes for participants

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.

Changing the layout of individual screens.

→ Demonstrate how to re-arrange questions manually on a screen (moving and resizing items).

→ Show how to merge screens together (to present questions on the same screen), and to split screens (to present questions on separate screens).

Placing text on a screen

→ Show how to place a label with text on a screen.

■ Notes for participants

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

→ Show the screen for Q13 – this will be laid out as a grid. Explain that this was set up automatically when the screens were generated.

→ In *question mode*, show Loop Q13 and Q13. Explain that this is a question table loop, and we will see how the resulting screen appear.

→ In *screen mode*, check that Q13 has been generated using the template **AskiaTemplate**. If not, re-generate it. Display the generated screen.

→ Explain that we can “flip” the orientation of a grid easily.

- Open the screen, and click the grid element.
- Right-click and select **properties**.
- Select the **response block** tab.
- In **library templates**, demonstrate the selections **horizontal grid** and **vertical grid**.
    - Point out that when you change from one to the other, the settings for *rows* and *columns* change automatically, as are the settings for *vertical loop* and *horizontal loop*.
    - Apply the change, and show the effect this has to the screen.

→ Explain that we can also change this from a *response block* (grid style), to *classic responses* (so that each row of the grid will be presented on a separate screen). This is useful when we want to change the positions of the individual items in the grid.

- Switch to question mode and open Q13. Add another response to the end of the response list: *rarely use*.
- Explain that we added the new response to the end so that we do not need to re-code the question. However, it should be displayed in the correct place (in between *sometimes* and *never*). We will remedy this in screen mode.
- Return to screen mode and open the screen for Q13.
- Click the grid element, then right-click and select **styles**, then **classic responses**.
- Rarely buy is at the bottom, but you can now drag the responses into the desired order.
- Use the Internet Explorer preview, to show how the screens are presented during the interview.

→ Explain that you can also present all these looped questions on one screen.

- Right-click on an empty area of the screen and select **properties**.
- In **sub-form**, select **vertical sub-form** and click **OK**.
- Show the IE preview, and point out the effect that this has (all the questions on one screen).

→ Explain that you may sometimes want to have questions running horizontally across the screen.

- To achieve this simply go into the screen properties again (right-click on the empty space, and select **properties**), and change **sub-form** to **horizontal sub-form**.
- Show the IE preview.

Notes for participants

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

→ Open the screen for the question Q8, and click any of the responses.

→ Right-click one of the responses, and click **select all controls of question**.

→ Right-click again, and select **styles**, then **combo-box**.

→ Make the combo box a little taller; this allows the items to be displayed.

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.)

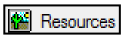
→ Adding a media file to the project.

→ Placing this file on a screen.

■ Notes for participants

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.

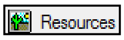
To add a multimedia file to the project resources:



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

→ Demonstrate viewing a preview of the current screen.

■ Notes for participants

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

→ Demonstrate testing the survey using the Internet Explorer preview.

■ Notes for participants

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

Discuss how Askia Design Controls (ADCs) are used to add rich content.

→ Explain that there is a library of example ADCs, and you can also create your own. There is an online manual for creating the controls; the link to this is given in the student coursebook.

Notes for participants

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

→ Show how to add an ADC to an interviewing screen, by adding the **gender** control to the screen for Q18.

→ Use the Internet Explorer preview to show the screen.

→ Explain that you also need to take out the raw question; to do this, go into the answer properties. On the **HTML** tab, enter the following in **code in cell**: “style=”display:none;”

Notes for participants

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

→ Ask the students to complete these exercises. You will need to instruct participants if they should attempt option A or option B.

1. Converting a grid

→ Option A applies if the default template presents grid questions as classic questions. Option B applies if the default template presents grid questions as response block.

(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 70 if you have forgotten how to do this).
4. Apply the template to your screens by generating the screens again (refer to page 70 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;
   ```

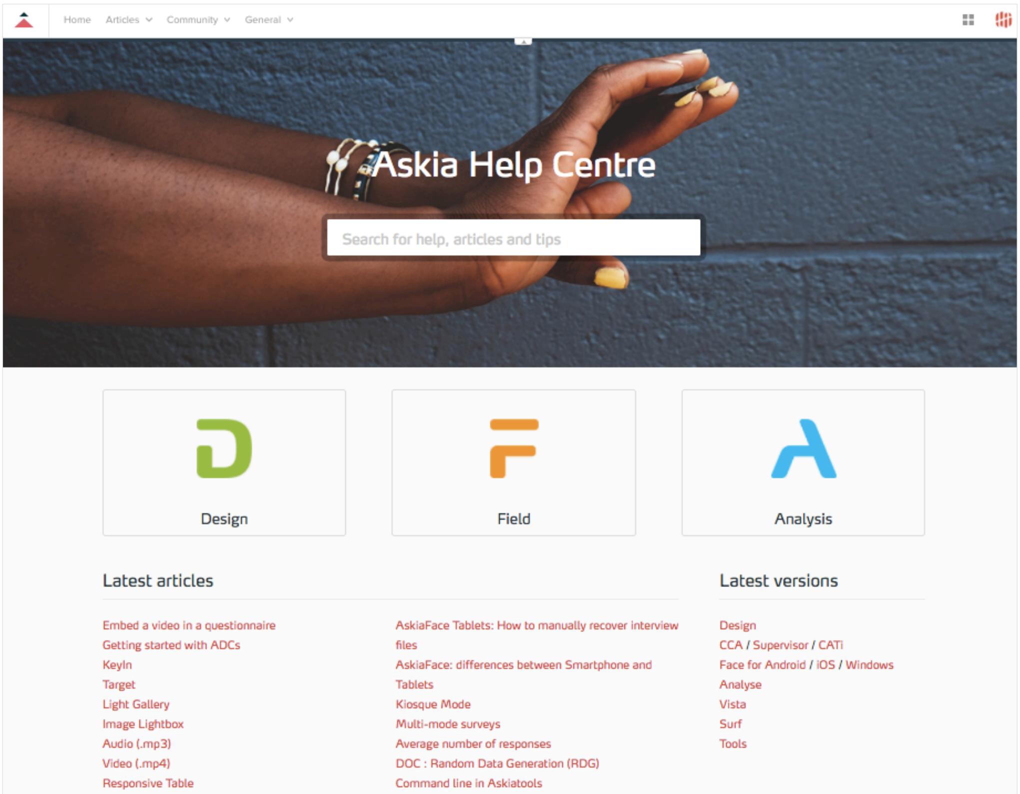
   Finally, click **OK**.
7. Select one or two screens from your questionnaire, and experiment with the layout options available to you:
   - re-position and re-size the items on the screens;
   - place custom text onto a screen;
   - try merging two screens and then splitting them again.
8. Save your work, 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	continue
3.	Tablet computer including Apple iPad	
4.	Smartphone	
5.	None of these	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	)on’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 — Skip to close message
2. I will give you a different email address — > 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.