

# **SurveyPro4**

## User Guide

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*SurveyPro 4.0 User Guide*

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# Chapter 1

## **Getting Started**

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## Using this Guide

Each of the chapters is identified as “Reference” or “Tutorial.” Reference chapters introduce new terms, provide advice on the best use of a particular feature, and document the dialog controls. Tutorial sections walk you through setting up a particular feature. Tutorials can usually be completed out of order—any assumptions about your knowledge will be identified at their start. You’ll find the reference and tutorial chapters are grouped in three sections: questionnaires, data collection, and analysis.

This guide includes complete information on working with paper questionnaires and reports. You’ll find functions specific to Web surveys in the NetCollect *User Guide*, keyed data entry on remote systems in the KeyCollect *User Guide*, and kiosk/LAN surveys in the DirectCollect *User Guides*.

## Additional Resources

### Guided Tours

These are quick videos that walk you through the main features of SurveyPro and acquaint you with how some of the tools operate.

<http://apian.com/software/surveypro/tour/>

### Discussion List and Newsletter

Apian provides a free discussion list for users to ask questions about SurveyPro and survey research in general. You can opt for either an e-mail or Web-based interface.

We also recommend signing up for the Apian newsletter to stay posted on product updates and workshops, and for the tips from our Support team.

<http://apian.com/support/forum/>

### Knowledge Base

This is a searchable resource for how-to questions and problem-solving.

<http://apian.com/support/knowledgebase/>

### Technical Support

All new orders and upgrades come with a period of free support. Annual support contracts may be purchased by phone at (800) 237-4565 or online.

<http://apian.com/support/> (206) 547-8392

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<http://apian.com/downloads/>

## Installing SurveyPro

SurveyPro's installation is a straightforward process, similar to other Windows applications.

1. Download the Install program according to instructions in your download e-mail (or get it from the CD if you requested one)
2. Run the Install program and follow the instructions
3. Make sure to have your SurveyPro 4.0 serial number available because the installation will require it.

### Installing KeyCollect, Respondent EMailer, or NetCollect Server Application

The installation programs for these supporting applications are placed on your hard drive while installing SurveyPro. You do not need to install SurveyPro itself on a system that only needs one of these modules.

The KeyCollect and Respondent EMailer installations are also very standard. For the NetCollect server scripts, you will need to refer to either the *NetCollect User Guide* or the server setup excerpt guide for details on server permissions.

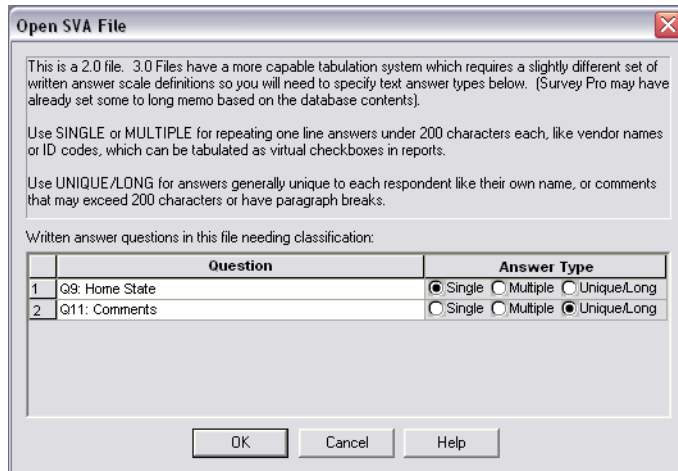
## Opening SurveyPro 2.0 Files

Before opening your version 2.0 files, be sure you have finished all your data entry and imported all your Collect data files. Once you convert the file to version 4.0, you can re-publish any KeyCollect or NetCollect surveys which you are continuing to use (see page 89).

When you open a SurveyPro 2.0 file, you'll be prompted to identify the type of 4.0 Written Answer scale you want for each open-ended question.

If you're unsure of the structure you need, the safest approach is Unique/Long which allows up to 10,000 characters, and then later you can change the scale to a shorter countable Written Answer.

In addition, question tiles which were stacked up to appear as grids in version 2.0 will be combined into a single tile Question Grid. These can be broken back into individual tiles via the Edit menu, Split Grid command.



## Chapter 2

# Key SurveyPro Concepts

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## Read This and Avoid Headaches

We know many of you hate to read documentation, but some of the following information will save you time, and some can prevent major problems with your project.

### 1. Your SP4 file is your whole project

One file includes your questionnaires, database and reports. Any data which you want to compare, such as different departments, should be in the same SP4, but separate projects should be in separate files.

### 2. SurveyPro is object-oriented surveying

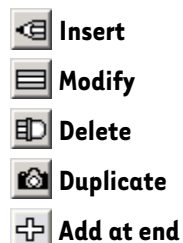
You've probably heard the term “object-oriented”—all it means is that something is constructed from a number of smaller building blocks. For documents, the objects are “tiles” arranged in a flow down a page. Question tiles consist of the question text and two more objects, the Scale and Text Styles. SurveyPro's objects are named items, so once you define one it can be used again and again. Then if you need to edit it later, you change it once and everything using it is updated.

### 3. Questionnaires are more than just page layouts

SurveyPro's questionnaire designer may behave like a page layout program, but behind the scenes it's creating a database based on your question structures. So, if you get creative and start putting underscores “\_\_\_” in for entry blanks, you're not creating a place for the data to go later.

### 4. Get to know the pencil buttons

Within the SurveyPro dialogs you'll see several types of controls used over and over, always with the same function.



Some or all of these buttons appear whenever a named object is used in a dialog. Named objects include Text Styles, Scales, and Form Selects. Insert is used to add a new object, modify edits the object (updating all tiles referencing/using it), and delete removes it. Duplicate allows you to create a new object starting with the settings of the currently selected item. The plus button adds a new item to the end of a list, such as a question grid or banner definition.



## 5. Collect = survey distribution and data collection

Within SurveyPro you'll see references to Collect modules. These are used to handle the distribution and data collection for surveys:

- NetCollect for Web surveys (see page 9)
- DirectCollect for independent executable surveys for kiosks, LANs and telephone interviews (see page 9)
- KeyCollect for additional paper survey data entry stations (see page 10)

## 6. If it feels like you're working too hard, you probably are

SurveyPro has a great deal of power, but sometimes all its features aren't obvious. If you end up doing something which takes a lot of steps, or feels like it's a lot of work, contact Technical Support or try the SurveyTalk discussion list (see page 2) for an easier approach.

## Project Planning

SurveyPro was designed to gracefully accommodate the editing and evolution involved in conducting surveys. However, a little planning at the beginning of your project can prevent headaches later.

While you create your survey, be sure to consider the following issues:

- What decision am I making?
- Who are the respondents?
- What are the most effective media to reach them?
- Will I need multiple languages?
- What types of analysis do I need to make my decision?
- Does the survey include all the questions I need to break down the data?
- Do the questions have the correct scales for entry and analysis? (Scales are data structures such as a number or date, single or multiple answer checkbox.)

Every one of these issues needs to be resolved before the questionnaire is tested with sample respondents, much less distributed. One of the most common support scenarios is a user attempting to analyze their results, only to discover that their questionnaire structure will not produce the statistics they need. While most problems can be corrected, some cannot,

so a little planning time is invaluable. If you have any questions about your questionnaire, Apian technical support is happy to check its structure.

## Survey Project Files

SurveyPro's tightly integrated SP4 files contain all the elements of a project: questionnaires, database, and reports. A single project can contain multiple questionnaire and report documents, but should only include questionnaires and data which are analyzed together. There's no limit in SurveyPro on the size of your database, or the number of projects you can create.

There are two tools you can use for viewing the contents and status of your file: the object tree (see page 15) and the File History dialog (see page 25).

In addition to SurveyPro, you'll come across several Collect modules. SurveyPro includes paper questionnaire design, database, and analysis. The Collect programs are used to deploy surveys and collect data for non-paper surveys.

Whether you select paper, Web or screen—or a combination of media—SurveyPro creates surveys, collects data, and generates reports in essentially the same manner. Of course there are differences in the details, for example skips and branching are a transparent experience via the Web or computer, but are clumsy via paper. Likewise, some of the paper layout options are unavailable for Web and screen-based surveys. However, these differences are more in the respondent experience than in the operation of SurveyPro.

## NetCollect for Web Surveys

NetCollect refers to Web surveys and the scripts you will install on your Web server to process the surveys, check passwords, branch, etc. NetCollect has two modes: ASP and Perl (set in Document Properties).

Version	Features	Documentation
ASP	The primary mode, with a rich set of features including randomization, forced sum tests, forward and back, and CSS-based layouts. May be used on your own Windows Web server and on QuestionWeb.com.	NetCollect4UserGuide.pdf SurveyPro's Help menu
Perl	Offers fewer features than the ASP mode, but allows you to execute surveys on Unix and Linux Web servers.	NetCollectPerl-QuickRef.PDF NetCollect+Perl.PDF

User Guides are located in the Documentation folder under your SurveyPro program installation.

## Respondent EMailer

The Respondent EMailer is an accessory program where you build a database of respondent information including:

- E-mail address
- Name
- Password
- Additional merge fields such as department, etc.

This is used to e-mail invitations and reminders for NetCollect Web surveys. It can also provide a pipe-in file for pre-loading information in your Web survey.

## DirectCollect for Kiosks

DirectCollect is for the design and distribution of screen based surveys. Applications of these self-contained surveys are varied, and can include e-mail, LAN, kiosk, or telephone and personal interviews.

DirectCollect is documented separately in three user guides which you'll find in the Documentation folder under your SurveyPro installation:

- Tutorial Guide
- Designer's Guide
- Interviewer's Guide

## KeyCollect for Data Entry

KeyCollect is designed for multi-user keyed data entry, whether you need additional users at one location or wish to distribute data entry to the survey collection points. The functionality is identical to the Answer Entry mode in SurveyPro (see page 121), except for a special Verify feature which allows for double-entry when you need complete accuracy.

KeyCollect is installed as a separate program from SurveyPro, and has its own User Guide and Help system. Your SurveyPro serial number will unlock 10 user seats per KeyCollect installation. If you need more than 10 seats at a site, simply install additional copies of KeyCollect (total seats is unlimited).

## Protecting your Projects

SurveyPro includes several features to protect your projects,:

- Optional automatic save, can be set from 5-60 minutes. Turn on the saves in the Tools, Options dialog.
- Automatic save in Answer Entry (the data entry screen) every time you edit a form in the database. Data is saved to a separate file, which is then merged into the main SP4 file when you leave Answer Entry.
- Automatic creation of a backup file (BAK), which is the last version you saved. If you ever make a serious error, exit SurveyPro without saving, then File, Open the BAK copy of your file.
- Questionnaire locking when you publish a document (to the Web, kiosk, etc.). This ensures it will not be edited accidentally and become incompatible with your data files. Documents are unlocked under the Edit menu.
- Password protection of the questionnaires, database, and/or reports. Set passwords in the Tools, Options dialog.

- Warning messages on changes which affect the database, such as modifying the structure of a scale or deleting a question which contains responses.

However, **none of this is a substitute for a formal backup policy!** You will see a reminder to backup your data before SurveyPro performs certain functions, but it's always a good idea to regularly copy files to CD, tape, floppy, or a LAN disk. If you're going to be experimenting with a file, use Save As to create a working copy.

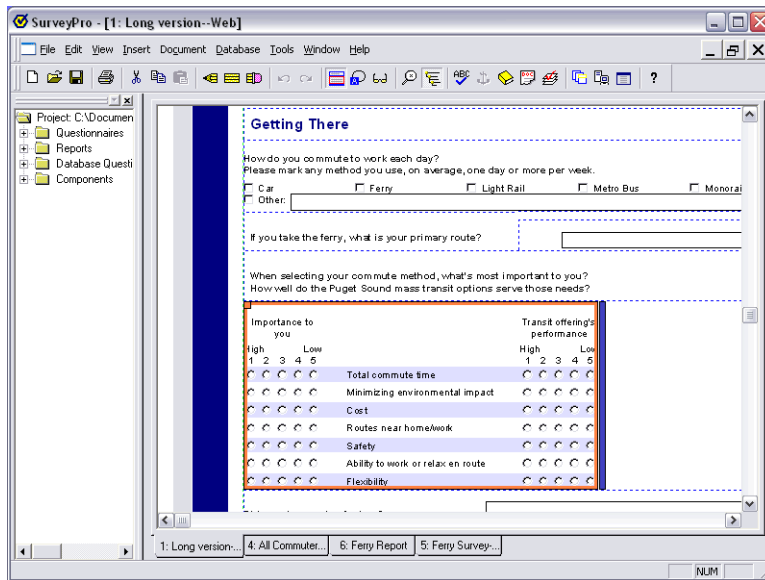
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# Understanding Questionnaire and Report Documents

A “document” in SurveyPro is a complete multi-page questionnaire or report. Unlike word processors which create long strings of content with very little structure underneath, SurveyPro’s document layouts are primarily reflections of your project structure. And while the contents of a question are dramatically different than those of a pie chart, the way SurveyPro works with in building a document are quite similar.

All documents are constructed of “tiles.” The image below shows several tiles, identifiable by their dotted outlines, or in the case of the selected tiles, heavier orange borders:



A tile in SurveyPro is a complete unit, able to stand on its own and be manipulated without requiring anything from other tiles. It’s a new concept to get used to, but here are four examples of tiles:

Tile	Contains
Text heading	Text, font specification, tile width, indentation
Question	Question text, short report label, scale (data structure), layout settings
Logo	Graphic filename, sizing dimensions, tile width, placement on page
Bar chart	Questions being reported, style (2D/3D), labeling style, legend

You'll become acquainted with tiles quickly enough as you begin to work with SurveyPro, because everything is contained in a tile, from the smallest rule line to a multi-page table.

While each tile does stand on its own, they also have ties to the Components you'll find in the Object Tree on page 15. Tiles in both your questionnaires and reports may reference the same Text Style to format their text, and several questions may share the same checkbox scale.

You can have many documents in a single project file. Examples of using multiple questionnaire documents would be conducting both paper and Web versions of a survey, or having your questionnaire evolve over time and maintaining the older versions intact. Multiple reports are often used for detailed versus overview perspectives, or reporting on verbatims independently of quantitative data. Remember that elements shared among documents remain connected, so if you edit a Scale or Form Select one place, all instances are updated.

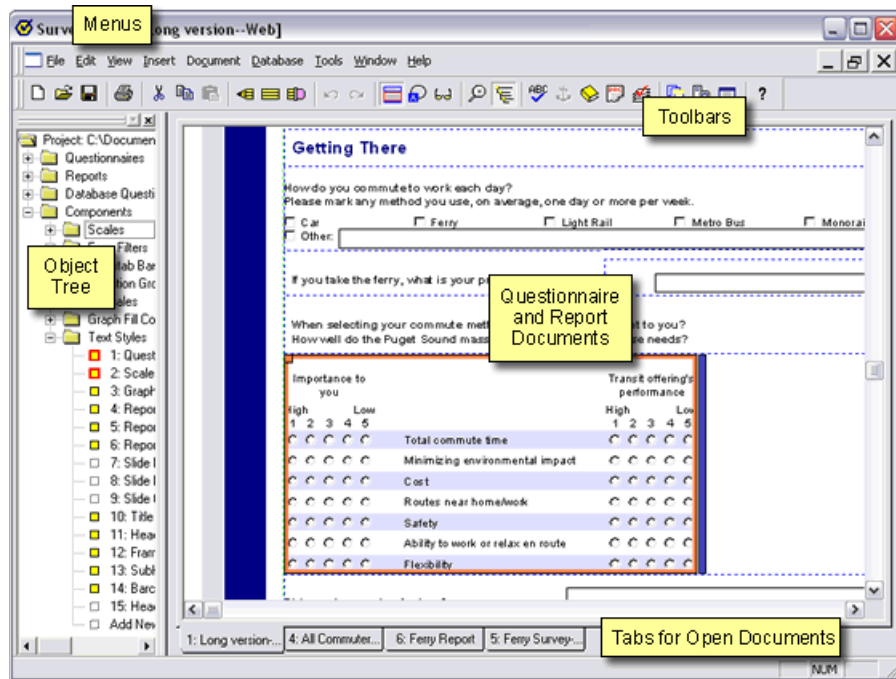
This chapter covers the aspects of documents which are common to both questionnaires and reports. See also *Questionnaires* on page 80 and *Reports* on page 242.

## Document Editing Screen

The main SurveyPro screen is broken into four primary areas:

<b>Menus</b>	The full set of tools for working with SurveyPro. (See page 16.)
<b>Toolbars</b>	Quick access to common functions.
<b>Object tree</b>	Shows all elements present in the file, and indicates which are in use. Elements can be edited by double-clicking, and right click offers other options (see page 15).
<b>Documents</b>	Open questionnaires and reports for this project file. The tabs at the bottom of the screen show all documents within the file which are open; others can be reached through the Document menu's Open Document.

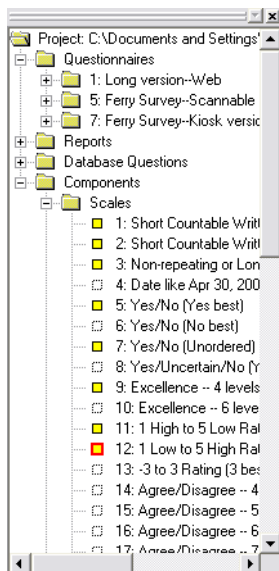




In addition there are several common dialog controls such as the pencil (see page 6) which you may want to review if you're new to SurveyPro.

Note that this is the screen for editing questionnaire and report documents—the Answer Entry screen for data entry and database management is covered separately on page 112.

## Object Tree



While your questionnaire and report documents are the visual representation of your project, the Object Tree is the structural. It's toggled on and off with the toolbar button or under the View menu. The tree can also be “undocked” so you can move it around your screen by clicking and dragging the horizontal bars at the top. Within the tree, you'll find folders and items grouped under four main sections: Questionnaires, Reports, Database Questions and Components.

The Questionnaires and Reports folders are organized similarly, each containing additional folders for each document you have created. Individual documents, like the one you see expanded at the top of the tree to the left, list the tiles contained in the document. (Tiles are questions, graphics, and figures.)

Database Questions is the master list of fields in the file. If your file contains only one survey, it will be almost identical to the questionnaire doc-

ument folder. However, if your file contains several questionnaires, or has evolved over time, the Database Questions folder will be a super-set of any one questionnaire.

The last main folder, Components, contains the reusable building blocks which make working with SurveyPro so much easier. When you start a new file, the Scales and Text Styles will be pre-loaded with components, ready for your use in constructing surveys. Since the remaining components are based on the data you will collect, their folders are empty in new files.

In addition to this organization, color coding tells you how a tile or component is being used. A filled box means it's in use in your file, while a colored outline indicates it's in use in the selected tile(s). Empty boxes indicate tiles or components which exist in the project, but which are not currently in use.

For the most part, SurveyPro's tree works similarly to those in other applications:






- To expand or contract portions of the tree, click the plus and minus buttons next to the folders.
- Click on an item to select it, and with tiles, jump to its location.
- Double-click on an item to edit it, or in the case of "Add New," to insert a new object.
- Right-click to access shortcuts to common commands.

## Document Editing Menus

SurveyPro uses two slightly different sets of menus depending on whether you're editing documents or the database. In addition, menu items will change slightly depending on whether one is working in a paper survey, Web survey, or report. See also *Answer Entry Menus* on page 113.






## File Menu






This includes common Windows file functions, such as print, save, and most recent files.

<b>New</b>	Ctrl+N		Creates a new empty SurveyPro project file.
<b>Open</b>	Ctrl+O		Opens a SurveyPro SP4 file. Can also be used to open a backup BAK copy, version 3.0 SP3 file, version 2.0 SVA file, or survey tag language STL/ST3 file.
<b>Save</b>	Ctrl+S		Saves the current file.
<b>Save As</b>			Saves the current file to a new name and/or location.
<b>Page Setup</b>			Jumps to the Document   Properties dialog for setting margins, layout preferences, and other elements specific to that questionnaire or report.
<b>Print Preview</b>			Shows the document with no tile outlines. Pages in preview mode cannot be modified, so select the preview menu item again to turn it off or go to the Edit menu and select Inline or Page Graphic tiles to resume editing.
<b>Print</b>	Ctrl+P		Brings up the Windows system print dialog.
<b>Print Setup</b>			Windows dialog for selecting your printer and setting options. This is also where you set the paper page size.
<b>File List</b>			Lists the SurveyPro files most recently accessed by your system.
<b>Exit</b>	Alt+F4		Closes the current file (prompting to save changes), and exits SurveyPro.

## Edit Menu



Cut, copy, paste, as well as SurveyPro specific functions for changing editing modes and locking documents.

<b>Undo</b>	Ctrl+Z		Undoes up to 5 prior actions.
<b>Redo</b>			Undoes the last Undo.
<b>Cut</b>	Ctrl+X		Standard Windows functions for cutting, copying or pasting the selected tile or text. This can be used to copy and paste text or tiles between SurveyPro and other applications, as well as within or between SurveyPro projects.
<b>Copy</b>	Ctrl+C		
<b>Paste</b>	Ctrl+V		

<b>Paste Same Questions</b>			Enabled in the Options dialog (see page 26) and used in Web surveys. Inserts a copy of a question tile within one questionnaire which has the same Q number as the original. See the <i>NetCollect User Guide's</i> Dynamic Questions chapter.
<b>Modify</b>	Enter		Brings up the relevant editing dialog for the selected tile(s). When modifying multiple tiles only the common values may be changed.
<b>Delete</b>	Del		Deletes the selected tile from the document. If it's a question tile with data, the field will remain in the database until you delete it from the data fields list in the tree.
<b>Inline Question Tiles</b>			Toggles between editing inline tiles which flow down the body of the page, and page graphic tiles which are fixed to a location on a specific page (unless anchored to an inline tile).
<b>Page Graphic Tiles</b>			
<b>Anchor Graphic</b>			When you have a page graphic selected you can anchor it to an in-line tile so they will move in sync. See page 49.
<b>Merge Into Grid</b>			Merges two similar grids or sets of questions together. Questions must use the same scale. See page 67.
<b>Split Grid</b>			Splits one large grid into two or more tiles. See page 68.
<b>Report Labels</b>			Changes the figure labels for questions, as well as the statistical labels such as "Counts." See page 248.
<b>Lock Changes</b>			Protects the questionnaires, database, and reports from accidental changes. When you publish questionnaires you will be prompted to lock the surveys, so that the data files will match the questionnaire when you import. See also the <i>Options Dialog</i> on page 26 for password protection.

## View Menu


Preferences for which screen elements to display and how.

<b>Zoom</b>			Adjusts the display size of the document.
<b>Object Tree</b>			Displays or hides the tree which appears by default on the left side of the screen.
<b>Document Tabs</b>			Displays or hides the tabs at the bottom of the document editing screen which are used to toggle among open questionnaires and reports.

<b>Toolbar</b>	Displays or hides the toolbar.
<b>Status Bar</b>	Displays or hides the status bar at the bottom of the SurveyPro window.
<b>Open Document</b>	Lists the documents in the current SurveyPro file which can be opened for editing.

## Insert Menu

While a few items in this menu apply to all document types, many vary depending on whether you have a questionnaire or report as the active document.

The Insert button  drops down a list of the most common selections.


### Common Elements:

<b>Inline Text/Graphic</b>	Adds text headings, comments, or images within the tile flow of questions or figures. See page 45.
<b>Page Text/Graphic</b>	The contents of the tile are identical to the inline text/images, but instead the tile is on the page graphic layer and fixed to a location on the page unless you anchor the graphic to an in-line tile (see page 49). This item is disabled when working in NetCollect documents.
<b>Text Style</b>	Similar to styles in word processors, Text Styles in SurveyPro are named styles for questions, scales, headings, and other types of information. Text Styles can be overridden for an individual tile or a few characters. See page 42.
<b>Breaks</b>	Ctrl+B Inserts page and column breaks within the tile flow. See page 50.
<b>Questionnaire</b>	Adds a new questionnaire document within the open SurveyPro file. Applications include multiple media (paper and Web), or surveys which evolve over time. See page 83.
<b>Report</b>	Adds another report document to the open SurveyPro file. Each report can contain multiple figure tiles (just like surveys contain multiple question tiles), so examples of report types are overhead slides, summaries, detailed cross-tabs, subgroup analysis, etc.
<b>Questionnaire Elements:</b>	
<b>Question</b>	All questions which will have data associated with them should be added using Question or Grid of Questions. See page 55.
<b>Grid of Questions</b>	Grids are a set of related items in a compact table format. This can include grids of open-ended or numeric data. See page 60.

<b>Scale</b>	Scales are the data structures associated with questions. These are named items, so a scale can be created once and then used by many questions. See page 72.
<b>Report Elements:</b>	
<b>Figure</b>	Inserts a new figure above the current selection. The type of figure is specified in the first tab. See page 187.
<b>Clone Figures</b>	Allows you to quickly replicate figures for multiple questions in your survey. See page 206.
<b>Form Select Filter</b>	Adds a named filter for use in working with sub-sets of the database. This also appears when questionnaires are selected. See page 213.
<b>Rescale</b>	Creates a layer you can apply to a scale for label changes, regrouping, value changes, etc. Each scale can have multiple rescales defined, and they're named objects which can be reused in many figures. See page 217.
<b>Banner</b>	A banner is a set of cross-tab specifications, used for complex settings which will be reused in multiple figures. See page 225.
<b>Question Group</b>	Each question grid column automatically creates a Question Group which can be analyzed as a single unit, but you can also create new groups which are sub- or super-sets, or with different orders. See page 232.
<b>Graph Color Fills</b>	Projects may contain several sets of color fills, which can be applied both at Document Properties and in individual figure dialogs. See page 250.

## Document Menu


Management functions for the open file's questionnaires and reports.

<b>Properties</b>	 Opens the Document Properties dialog where you can set preferences for medium, margins, numbering, headers and footers, etc. Many settings are specific to the medium, and whether the document is a questionnaire or report. See page 30.
<b>Skip Patterns</b>	Sets rules for skips and branches in a survey. See page 82.
<b>Publish Questionnaire</b>	The Publish command takes your SurveyPro questionnaire and packages it up for distribution. If you don't see an option you expect, check your Document Properties to make sure the medium is correct. See page 89.
<b>Report On</b>	This is like a filter or cross-tabulation at the document level. You specify a question or Banner and the report is replicated for each answer in the question or banner point. See page 238.

<b>Publish Report</b>	Exports either a report document as an HTML page, or a set of images for placement in other applications. The printable images can be saved as a higher resolution than you can get via copying and pasting tiles from SurveyPro to another program. See page 251.
<b>New Questionnaire</b>	Adds a new questionnaire document within the open SurveyPro file. Applications include multiple media (paper and Web), or surveys which evolve over time. See page 83.
<b>New Report</b>	Adds another report document to the open SurveyPro file. Each report can contain multiple figure tiles (just like surveys contain multiple question tiles), so examples of report types are overhead slides, summaries, detailed cross-tabs, subgroup analysis, etc.
<b>Copy Document</b>	Creates a new questionnaire or report which is a copy of the currently selected document. For questionnaires, any questions which are shared between documents will collect in the same database field. See page 83.
<b>Delete Document</b>	Permanently removes a questionnaire or report from the current file. Note that this will not remove questions containing data or sub-elements such as scales. See also <i>Mass Delete</i> on page 128.
<b>Open Document</b>	Lists the documents in the open SurveyPro file which can be opened for editing.



## Database Menu

Access to the Answer Entry screens as well as import and export.

<b>Answer Entry</b> F8		Switches from the document editing mode into Answer Entry, where you can view, edit, and add individual records. See page 111.
<b>Import from</b>		Adds data to your survey file, either as new forms or updating existing forms. Note that the fields into which you are importing (created by scaled questions) must already exist. See page 144.
<b>Batch Import</b>		Allows you to import multiple Collect data files at once. See page 155.
<b>Export to</b>		Creates a data file of selected forms and questions for transfer to another application. See page 159.

## Tools Menu

Utilities and preferences for working in SurveyPro.


<b>Spell Check</b>	F7		Checks spelling in the current document, including sub-elements such as scales and figure labels. See page 23.
<b>Spelling Options</b>			Allows you to control what the spell checker should ignore, edit your custom dictionary, and activate the legal and medical supplements.
<b>File History</b>			Displays the current status of your file as well as publish, import, and export activity through its history. See page 25.
<b>Make PIN File</b>			Creates a SurveyPro compatible PIN file for password or field checking. Could be generated by SurveyPro or a conversion of an ASCII file. See page 88.
<b>Options</b>			Preferences for both the current file and for your system. See page 26.

## Window Menu

List of open documents and tools for arranging them.

<b>Cascade</b>			Stacks up all the open documents so you can see the title bar of each one.
<b>Tile</b>			Arranges the open documents on the screen so that you can see each one.
<b>Arrange Icons</b>			Aligns the icons of documents which are open but minimized along the bottom of the screen.

## Help Menu

<b>Contents or Index</b>			Jumps to the contents of the Help system.
<b>About SurveyPro</b>			Displays the version, serial number, license, and legal notices.



## Managing Documents

New SurveyPro project files start out with four documents:

- Questionnaire: an empty survey document
- Executive Summary: an automatic report (see page 243)
- Data Table: another automatic report (see page 244)
- Custom Report: an empty report document

There are several tools for adding, opening, and managing your documents:

### **Object Tree**

Lists all documents in the file, grouped under Questionnaires and Reports. Double-clicking on a document folder brings up its Document Properties dialog (see page 30). Right-clicking allows you to copy a document or insert a new one. See page 15.

### **Document Menu**

Allows you to modify the document properties, add a new report or questionnaire, copy an existing document, delete a document, or open a document which exists in the project file but is not currently on display. This is also the menu for publishing documents, such as screen-based surveys to file, or reports to HTML.

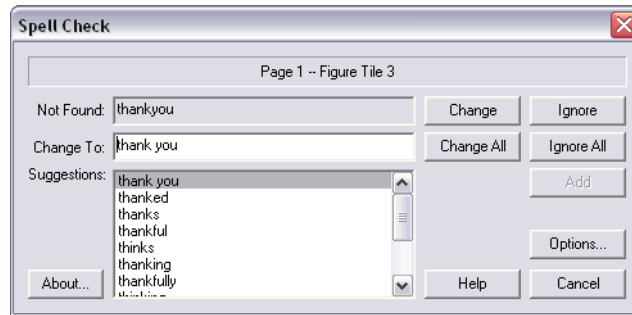
### **Document Tabs**

Displayed at the base of the document screen, these tabs show the open documents. You can also switch between documents using the Window menu, but the tabs are generally quicker. In general, you only want to keep your active documents open to save time on file open and save (especially if your file includes a few 200 page reports detailing 10,000 respondents).

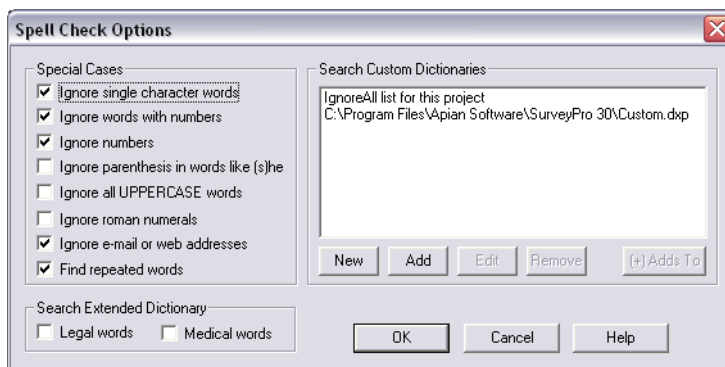
While a single SP4 file may contain up to 1,000 documents, most consist of 4-10 documents. If you start working with multiple questionnaire documents, we strongly recommend you review the information on page 83. And, if you are generating a large number of reports, you may find Report On a lifesaver (see page 238). Technical support is also available to discuss issues of consolidating or breaking apart survey projects.

## Spell Check

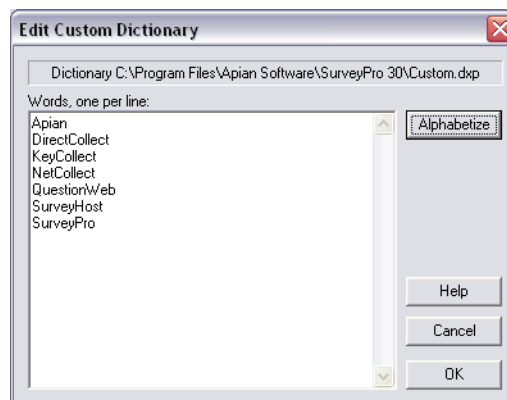
SurveyPro checks the spelling of everything displayed in the document, including scale labels and other elements in questionnaires. In reports, this includes the question names and form select filter names.



The Options dialog is where you decide what you want the spell checker to ignore, whether it's e-mail addresses or specific words you add to your dictionary. By default, all the words you add in the spell check dialog go into your system's custom dictionary (which you need to create to enable the Add button), but you can also exchange dictionaries with co-workers for sharing industry-specific terms.



If you know of a set of words you'll need to use, or would like to edit the words you've added, select the custom dictionary you want to modify and click Edit. You can type in this dialog as a simple list, adding, changing, or removing entries.



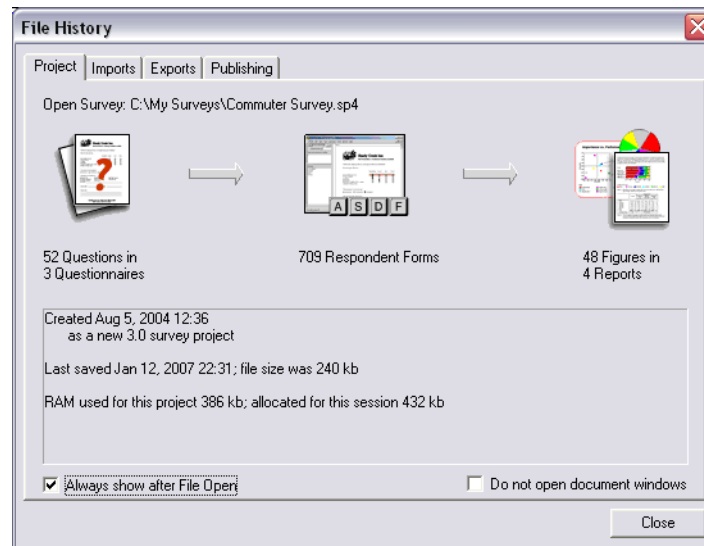
## File History

File History is a great tool for checking the current status of your file, as well as digging through old log files to see what you've done in the past.

The top panel displays the contents of your file, with the number of questions in questionnaires, records in the database, and figures in reports.

Below that is a history of the file, including whether it was converted from an earlier version or started in 4.0.

At the bottom you can disable the dialog from popping up automatically when you open the current file.



### Project tab

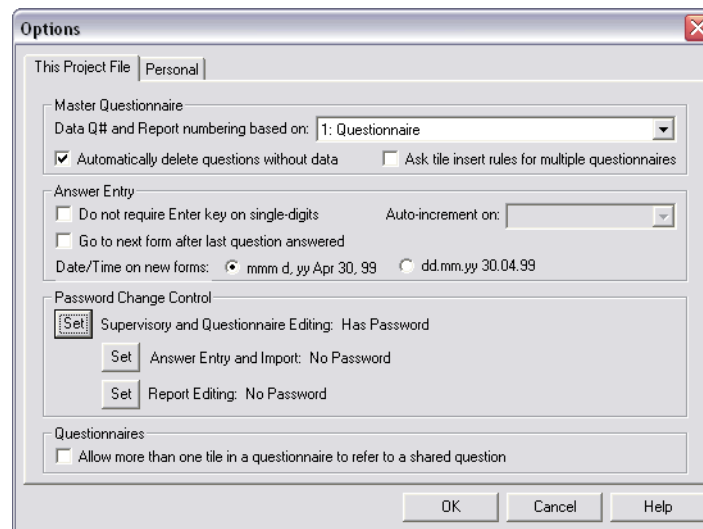
On the first tab is a summary of the project, with the name and location, contents, and a history of its creation. This screen appears when you open files (unless you turn it off), and is a convenient snapshot after major transactions such as import and mass delete. At the bottom of the dialog is an option to not open document windows, which can be a way to quickly open large files, then individually opening questionnaires or reports through the Document menu.

### Import, Export and Publishing tabs

Every time data is imported or exported, or a document published (such as to HTML), a log is generated. Logs are stored in these tabs until cleared, and act as confirmation, reference, and troubleshooter. The logs do not take much space, so we recommend keeping them in the file. See *Publish Logs* on page 28, *Import Log Files* on page 157, and *Export Log Files* on page 168.

## Options Dialog

Most of the options apply to the file currently open. They are retained during Save and Save As operations.



### Data Q# and Report numbering

If you have multiple questionnaire documents, you can select the question numbers referenced in reports.

### Automatically delete questions

Behind your questionnaire(s) is a master database which normally matches your survey's content. By default, SurveyPro deletes questions which do not contain data when they are removed from all questionnaires, but you can turn off this option to keep the question for future use. Use the object tree to manage questions in your project (see page 15).

### Ask tile insert rules

When you have multiple questionnaire documents, inserting new questions involves a prompt for whether you want to add the tile to all questionnaires or just that one survey. At the bottom of that prompt dialog is an option to stop asking—this setting turns the prompt back on.

### Do not require Enter key

To speed data entry, you can have SurveyPro automatically drop to the next question after entering an answer to single-digit scales.

### Auto-increment

Select a question to automatically increment as you enter new forms. The question must have a number scale.

### Go to next form

After the last field is entered on a survey, Tab will take you to a new form when this is enabled.

### Date/Time on new forms

Switch the format for SurveyPro's internal date/time stamp from American to European.

**Password Change Control**

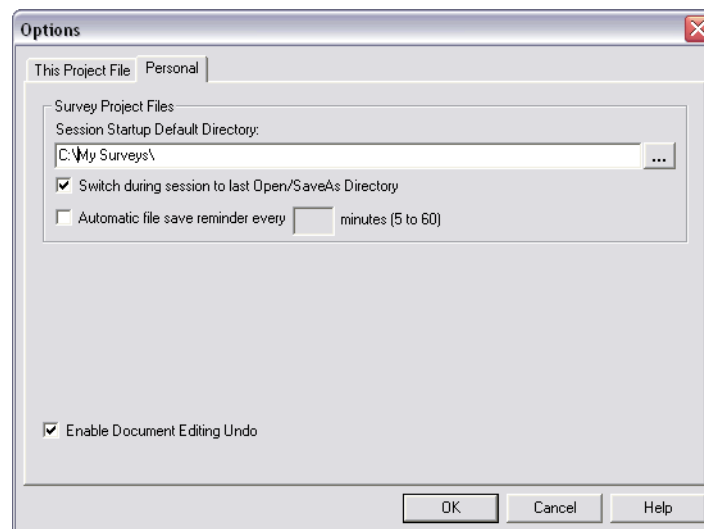
By default, SurveyPro files are open for any editing. The first level password prevents unauthorized users from making edits to the questionnaire or the password settings. You can then add passwords which will restrict data entry/import, and reporting.

When a protected file is opened, it has these areas locked using the setting in the Edit menu. To unlock, click on the area, and enter your password.

Note that your internal LAN security can be used to protect entire files from access by unauthorized users.

**Allow more than one tile in a questionnaire**

Normally, when you copy and paste a question within one document, the pasted tile is added as a new field in the database. In some advanced survey designs, you may want the same question (by Q#, not just visible text) to appear more than once in the survey. Be certain the multiple locations are exclusive skip paths, as any later instance of a question for one respondent would overwrite the original instance.

**Session Startup Default Directory**

Sets the default for SurveyPro to look for and save data files.

**Switch during session to last**

Has SurveyPro look wherever you were last working for imports, exports, graphics, and new files. With this off, SurveyPro will look first in the default directory.

**Automatic file save**

Has SurveyPro save automatically at an interval you specify. The warning notification will appear just once per session, not per file.

**Enable document editing undo**

If you do not use the Undo function, disabling it might enhance SurveyPro's performance. However, before turning off Undo, try closing any doc-

uments you're not actively editing as this also speeds file changes. With a newer system with sufficient RAM, you will rarely need to turn off Undo.

## Publish Logs

Publish logs are most useful for NetCollect surveys, where they specify the filenames, paths, administrator passwords, and other settings for the surveys.

In other cases, the logs are a useful reference for when a document was last published and to which format.

Publish logs are accessed through the Tools menu, File History dialog.

Chapter Contents:

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  - General Tab for Questionnaires . . . . . 31
  - General Tab for Reports . . . . . 32
  - Title Tab for Paper Documents . . . . . 33
  - Logo Graphic Tab . . . . . 34
  - Footer and Header Tabs for Paper Documents . . . . . 35
  - Layout Tab for Paper Questionnaires . . . . . 36
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## Document Properties

For both questionnaires and reports, Document Properties sets many of your layout preferences.

For questionnaires, Document Properties also sets the medium (paper, NetCollect, DirectCollect). Because this can have a significant impact on your layout options, setting it first can prevent time-consuming redesigns later.

While some of the controls differ slightly, the dialog sets essentially the same elements for all media:

- Questionnaire dimensions
- General look and feel, such as colors and checkbox styles
- Translation or customizing of automatic labels for Other blanks, NAs, and buttons
- Default graph fill set (colors for pie charts, etc.)
- Automatic numbering style
- Passwords (see page 86)
- Logos and titles
- Headers and footers

Since all of these elements are applied at the document level, it's easy to quickly change the appearance of a survey or report, and to have very different layouts for the different questionnaires in your project.

All settings that are made in Document Properties carry through the survey process. For example, if you turn on a password, your settings will appear automatically in both the Questionnaire Publish dialog (see page 89) and Import Data Cleaning tab (see page 153).

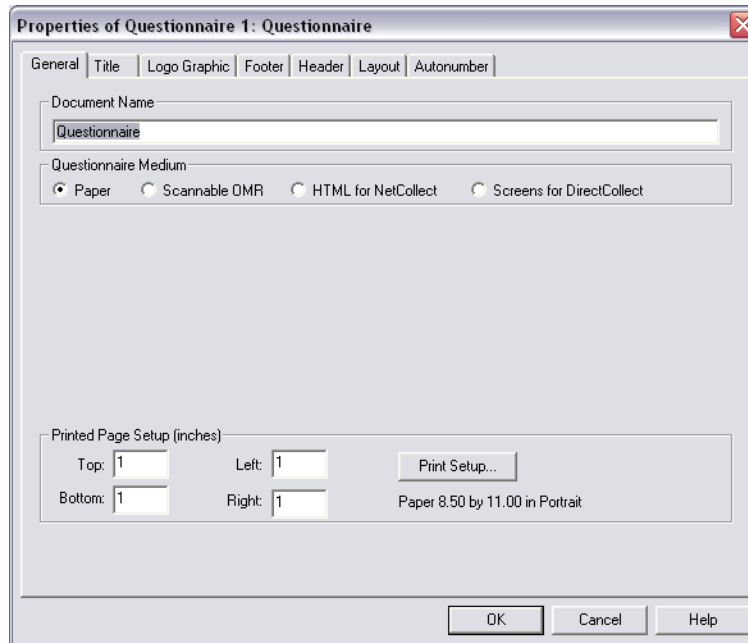
See the NetCollect and DirectCollect User Guides for details on their Document Properties options. Several of the tabs are described here as “for Paper Documents” or “for Paper Questionnaires” when the settings are specific to surveys for a particular medium.

The two automatic reports, *Executive Summary Automatic Report* on page 243 and *Data Table Automatic Report* on page 244, have custom Document Properties dialogs.



## General Tab for Questionnaires

Settings to this tab should be made first as they ripple through the rest of the dialog. Paper surveys are also used for scannable forms, just set the checkbox style in the Layout tab.



### Document Name

Document names are for internal reference only in dialogs and lists, and will not be printed on questionnaires or reports.

### Questionnaire Medium

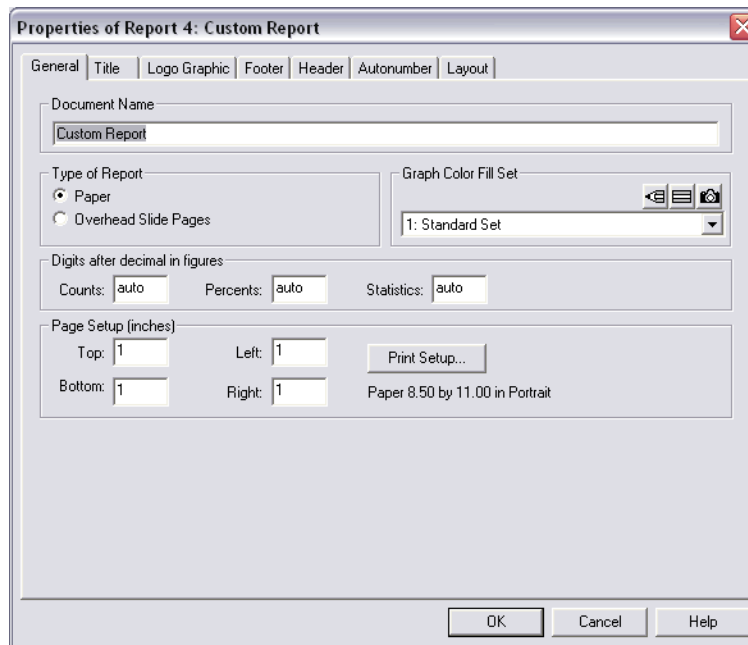
The medium setting ripples through many layout and input controls, so we recommend setting it early. If you need to create a survey in multiple media, finalize the content in one version then use Document | Copy Document to create a duplicate, then change the medium on the new version. Then adjust the layout in each medium.

### Page Setup

Sets the margins for your overall document—individual sections can be overridden through the Insert, Breaks dialog. Page size and orientation are set in Print Setup.

## General Tab for Reports

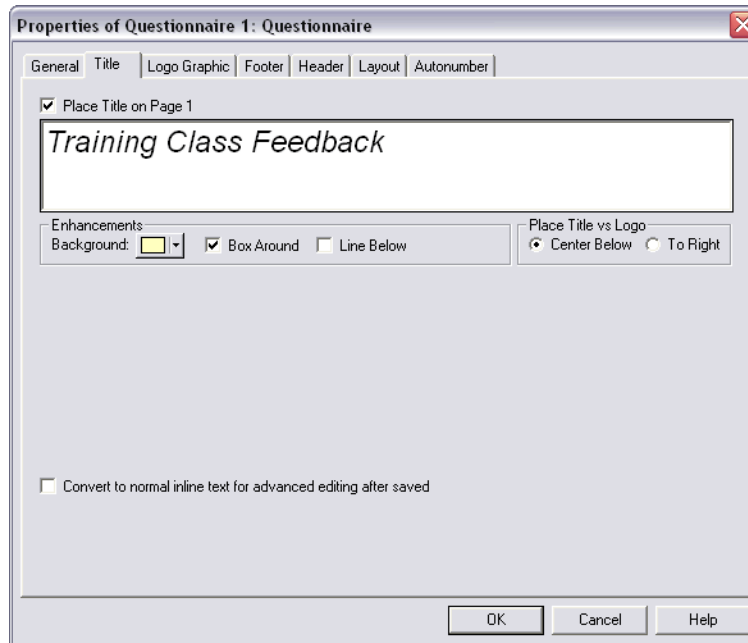
Unlike questionnaires, reports can be published to assorted media (including HTML), even when Paper is selected. See also *Automatic Report Document Properties Dialog* on page 245.



- Document Name** Document names are for internal reference only in dialogs and lists, and will not be printed on questionnaires or reports.
- Graph Color Fill Set** The set of colors used to fill pie charts and bar graphs can be set at the document level, as well as overridden at the figure level. See page 250.
- Type of Report** Your report can be formatted for paper, or large format for use with projectors. See *Publishing Reports* on page 251.
- Digits after decimal** Override the default number of decimal places for counts, percentages, and statistics such as the standard deviation.
- Page Setup** Sets the margins for your overall document. Page size and orientation are set in Print Setup.

## Title Tab for Paper Documents

Quickly add a title to the top of your document with this tab. If you need more control over the placement, you can convert the tile to a regular page graphic or insert one manually.



### Place Title on Page 1

While in the text box, it will preview all your settings except line breaks. Use the Text Palette to change the typeface, size, color, etc. You can type up to 2000 characters, and multiple paragraphs.

### Enhancements

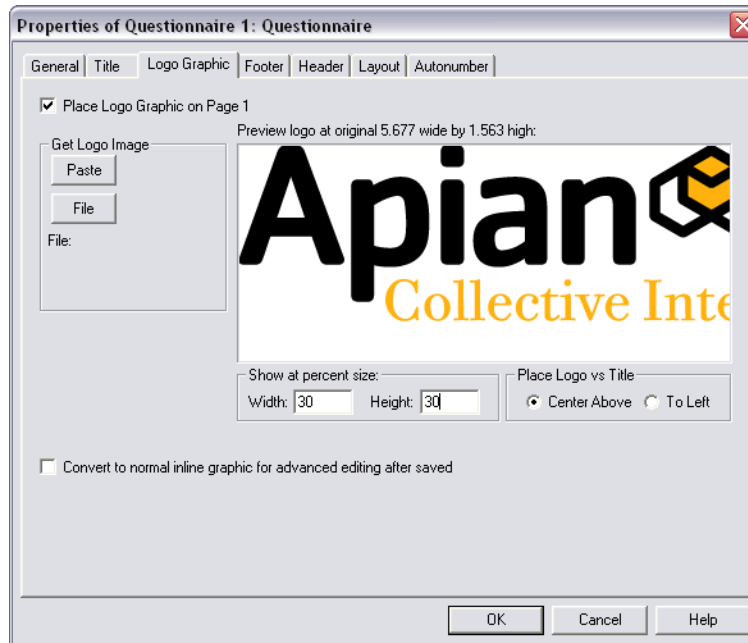
Places a border around the title. Additional options are available if you convert the title to a regular graphic tile.

### Place Title vs. Logo

Either centers the title below any logo you've included using Document Properties, or places it to the right of the logo. If you have not included a logo, you can align the title to left, center or right.

## Logo Graphic Tab

Quickly add a logo to your document with this tab. If you need more control over the placement, you can convert the tile to a regular page graphic or insert one manually.



### Preview logo

Provides a peek at the image. Note that you should always print your document or publish it to the final format for a completely accurate representation.

### Get Logo Image

Select the image from a file or paste it from the clipboard.

### Show at percent size

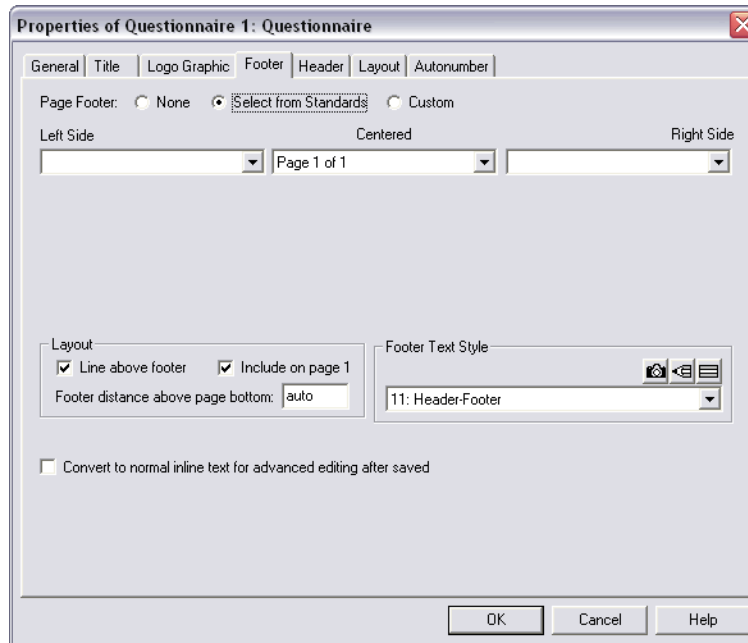
Allows you to resize the image. Bitmaps should only be resized down, as increasing their size will produce a poor-quality image.

### Place Logo vs. Title

Sets the graphic's location within the specified tile.

## Footer and Header Tabs for Paper Documents

These tabs are a quick way to set up your footers and headers. Once they're done, you can either leave them under the control of this dialog or convert them to fully editable page graphic tiles.



### Page Footer/Header

Select from among pre-loaded headers and footers or switch to custom for full control.

### Custom Format

With custom headers and footers you have free control over the format and can create multi-line items. Use the variables button on the Text Palette to insert page numbers, dates and times (variables are indicated by strike through text).

### Left Side/Centered/Right Side

Pre-loaded headers and footers for left, center, and right alignment based on the margins you set in the General tab. For custom controls, see below.

Overrides the automatic placement of the header or footer.

### Line above/below

Draws a fine line between the header or footer and body of the page. This can also be done manually with page graphics.

### Include on page 1

Allows you to exclude the footer or header from the first page. If you need more control over the page usage convert the footer or header to a page graphic.

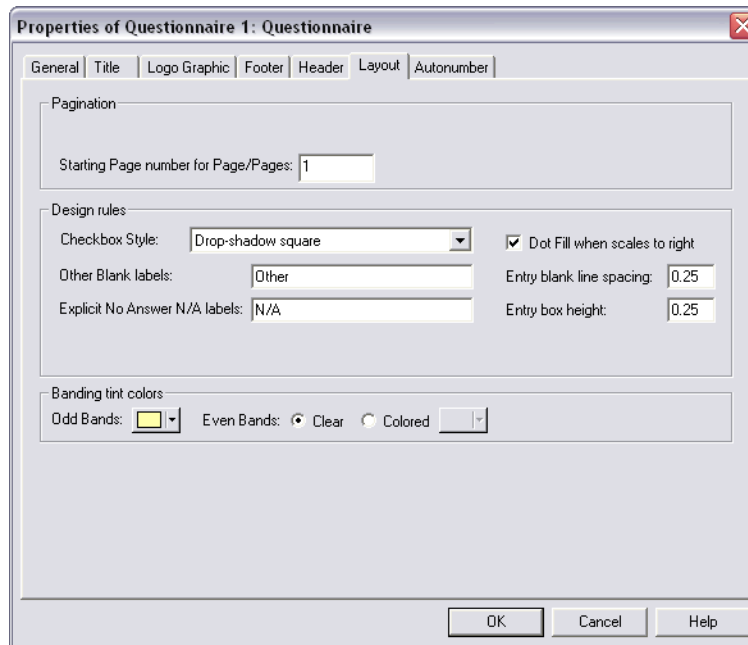
### Footer/Header Text Style

Text Styles provide the basis for your font settings. Use the Insert pencil point to add new styles for different types of information such as instructions, or modify existing styles to suit your needs. Remember, when a

style is changed, all tiles using it are automatically updated. If you need to override a style for just one tile or a few letters use the Text Palette (see page 44).

## Layout Tab for Paper Questionnaires

In addition to all the question-level layout settings you can make, this sets up the general attributes such as the shape of checkboxes and coloring.



### **Pagination**

If your questionnaire is part of a longer document, you can change the starting page number for headers and footers.

### **Checkbox Style**

Checkbox style is both a preference and a functional setting. The two thin line styles are used for scanning where drop shadows can confuse the OMR/OCR software.

### **Other Blank labels**

Modify or translate the label used for SurveyPro's Other blanks.

### **Explicit No Answer**

Lets you set the label used for SurveyPro's special Not Applicable scale item (excluded from means and other calculations, but tabulated for frequencies).

### **Dot Fill**

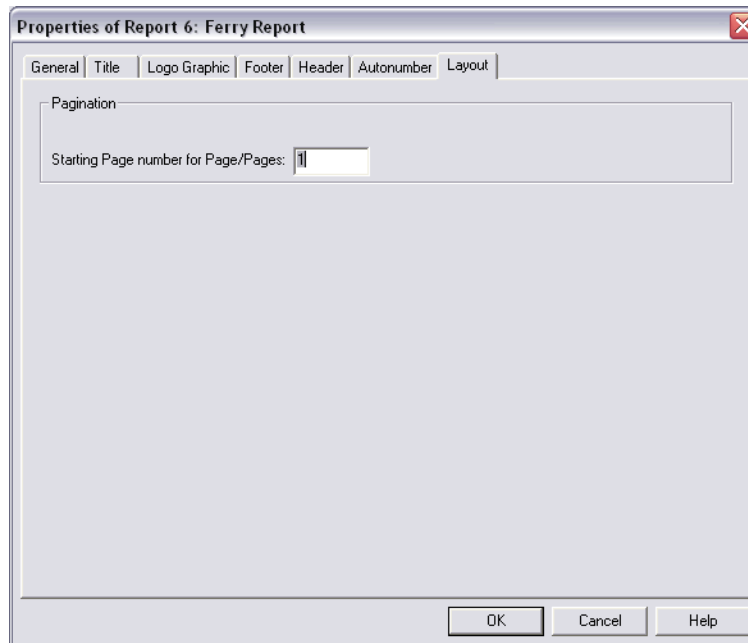
Use the dot fill (.....) to provide a visual connection between a question and its scale at the right margin.

### **Entry blank line spacing**

Allows you to adjust the vertical space SurveyPro allows for writing in responses.

- Entry box height** Sets the height of write-in boxes. Width is set in the individual question dialogs.
- Banding tint colors** Within grids, you can tint alternating rows to help distinguish items. This is particularly useful for Web surveys where you cannot use the dot fill.

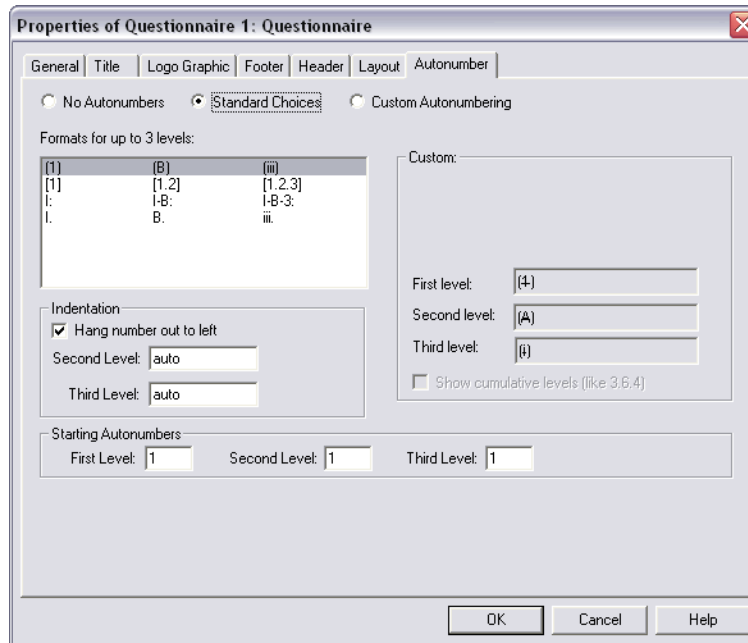
## Layout Tab for Reports



- Pagination** If your report is part of a longer document, you can change the starting page number for headers and footers.

## Autonumber Tab

Set up automatic numbering for your survey using preset styles or custom formats. Autonumber is applied within an individual question tile, so you have full control over what is first, second, or third level. When multiple levels are used, the lower levels reset as soon as an upper level is used.

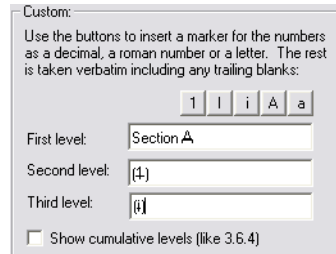


- Type** Sets whether you want automatic numbering, and if so a pre-loaded or custom format.
- Formats for up to 3 levels** Select from among pre-loaded Autonumber formats. Note that even though three levels are defined, the application of the levels is left to the individual tile so you may only use one or two.
- Indentation** Controls whether you want the number to “hang” to the left of the text string, as well as how far you want levels indented. By default levels 2 and 3 indent slightly, but you can set that to “0” or any other value.
- Starting Autonumbers** In most cases the starting number will be 1, but if your questionnaire or report is part of a longer document you can increase the value.



## Custom Autonumbering

With custom autonumbering you can customize the text and format to match your corporate standards. Text shown with a ~~strike through~~ is a variable which will be replaced by the actual value in your document.



### 1 | i | A | a buttons

Insert variables for numbers, uppercase Roman, lowercase Roman, uppercase alpha, and lowercase alpha respectively.

### First/Second/Third level

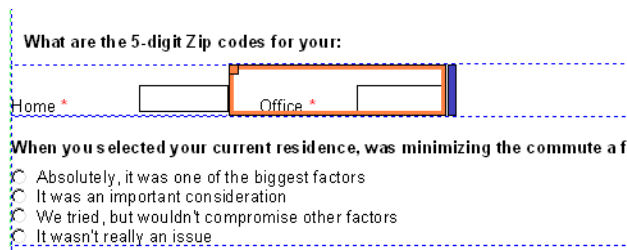
Type the extra text you want in your format, then use the buttons above to add the numbering variables. Be sure to include a few trailing spaces to separate the number from your text. Fonts can be overridden using the Text Palette (see page 44).

### Show cumulative levels

Includes the upper level numbers and text in each tile. Applies to all three levels.

## Working with Tiles

Tiles are SurveyPro’s building blocks for constructing documents, and include graphics, text, questions, and charts. They can be placed either in the column flow, or fixed to a location on one or more pages. In most cases, tiles will span the width of the column, but you can also lay them out side-by-side:



## Editing Tiles

Your primary tool for editing tiles is the pencil:



**Insert**

Adds a new tile above the current selection. To add a tile at the end of a document, click the blue bar to select it (turning it orange) and then insert. If you want to add tiles side-by-side as for an address, first shorten a tile, then click the vertical blue bar and insert a tile to its left. Right-click can also be used to insert tiles.



**Modify**

Brings up the graphic, question or figure dialog to edit the tile's settings. Double-clicking on a tile, pressing Enter when a tile is selected, and right-click menu can also be used to access the tile's editing dialog.



**Delete**

Removes the tile from the current document. If it is a question tile which exists in more than one document or contains data, you will have to delete it from the Object Tree's Database Questions section to completely remove it and the responses associated with it from the file. The Delete key can also be used to remove selected tiles.

### Editing multiple tiles

In some cases, you can edit several tiles at once. To select a series of tiles in a flow, click on the first one, hold Shift down, and click on the last. Non-sequential tiles can be selected with Ctrl+click. When you click Modify and the editing dialog appears, you will be able to edit settings common to all selected tiles.



**Inline vs.**



**Page tiles**

Inline tiles are manipulated in a separate mode from page tiles. To switch modes, use the inline, page, and preview toolbar buttons. If you cannot switch out of preview mode, it means the document has been locked under the Edit menu to prevent changes. Tiles cannot be converted from page to inline or vice-versa. Note: NetCollect surveys can only use inline tiles.

### Moving tiles

In the upper-left corner of selected tiles (orange outline), there is a small square which is the move handle. When you place your mouse pointer over the square, it changes to a hand. For inline tiles, click and drag the tile, releasing when you see a red insertion bar where you want it to move to. Page graphics can be moved anywhere on a page. Cut and paste can also be used to relocate tiles.

### Resizing

Tiles can be resized in width and height with the mouse or numerically through the dimensions settings in their graphic/question/figure dialog. With a mouse, move your pointer over the right or bottom edge, until you see a double-headed arrow. Then click and drag to the desired size. You may notice that as you change a tile's width, the height changes also, reflecting the line wraps at each width. There's a minimum height and

width for each tile, which you may be able to adjust by changing layout and font settings in the editing dialog.



**Cut**




**Copy**



**Paste**

As with other Windows programs, Cut removes tiles to the clipboard, Copy places a copy on the clipboard, and Paste inserts the tiles back in. When you copy and paste tiles within SurveyPro, it keeps track of all the elements including scales, fonts, etc. Pasting tiles into other applications, such as Microsoft Office, will insert plain text or a graphic depending on the application and tile type.

You can also paste text into SurveyPro when you're in a question, grid, text graphic, or figure tile's editing dialog. In addition to the usual Ctrl+v paste, when the Text Palette is visible (see page 44) a Paste Unformatted  option is available to insert plain text.

Question tiles in a multiple questionnaire document files have some special issues—see *Multiple Questionnaire Documents* on page 83 for details.

## Tile Names & IDs

Within your SurveyPro file, tiles are identified in the following ways:

- The Object Tree groups tiles under the document(s) in which they are used. Question tiles are also listed under Database Questions.
- Tile number, such as T4, identifies its place in that questionnaire or report. This is used primarily as a reference in the Object Tree (see page 15).
- Question number, such as Q7 or a range Q45-53 for a grid. Q numbers are their IDs, so you'll see them used in the object tree, dialogs, and data files.
- Internal question number, a unique ID which, unlike the Q number, will not change or be assigned to another question.
- Autonumber, the question or figure number you set up with the tile definition (activated in Document Properties). When you create report figures, you may be given the option to number questions in the figure by their autonumber or Q number.
- Name, required for questions and grids, optional for figures. Names are used both for reference in the Object Tree and dialog lists as well as for display in documents. Question names are sometimes referred to as Report Labels in dialogs.

When working with a single questionnaire document, the distinctions between these different identifiers are much less important because your

questions will be organized similarly throughout the project file. However, in multiple questionnaire document files, the correspondence between Q numbers and the order of a survey may decrease. For all projects, taking a moment to type a clear, descriptive name will eliminate having to hunt for tiles and correct labeling later.

## Text Formatting

Each element of text within a tile, such as the caption and labels in a figure, has a Text Style associated with it. The Text Style is a named component which defines the font, size, emphasis and color of the text. This Text Style can be shared among many tiles, and when it is edited, all tiles using it will be updated at once.

In addition to this style, you can override the font settings for a letter, a word, or an entire string of text. Overrides are made by selecting the characters you want to change, and then clicking the control you want to change in the Text Palette.

Attributes set by Text Styles and the Text Palette are:

### **Typeface**

The typeface can be a specific TrueType font, or you can select “Best Sans Serif” (like Arial) or “Best Serif” (like Times Roman). These two options are recommended for NetCollect and DirectCollect forms because you cannot ensure respondents will have a specific font.

### **Size**

Font sizes are specified in points ( $1/72$  of an inch), but the dialog also indicates the size at which it will publish to HTML.

### **Emphasis**

Bold, italic and underline. Note that long strings of Italic are difficult to read on-screen for NetCollect and DirectCollect forms, and underline can be confused with links on the Web.

### **Color**

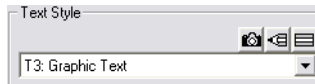
Common color selections are offered in the mini palette, or you can click Other to select a custom color.

While SurveyPro’s dialogs and screens do preview your font settings, we always recommend viewing the document in its final published form—printed, published to HTML, published to screen—before finalizing your choices.

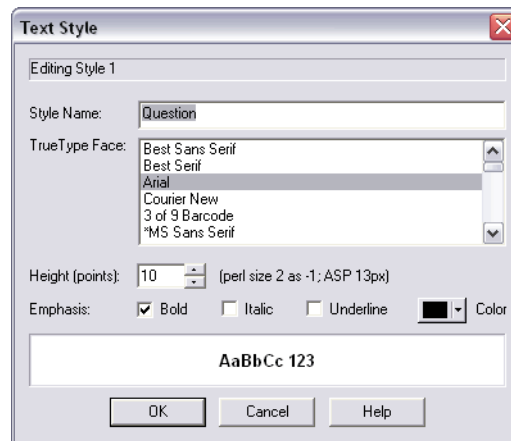
## Text Style Dialog

SurveyPro's Text Styles are an easy way to maintain a consistent look within your documents. New projects come pre-loaded with 12 styles which are the defaults for questions, scales, figures, and other components. While you cannot delete or rename these styles, you can edit them to match your document's style. Note that even though the pre-loaded Text Styles may be named for their default use, you can apply them to any element.

Text Styles may be inserted through the Object Tree and Insert menu, but the quickest approach to adding and editing styles is right where you use them. In the question, figure or graphic dialogs, you'll select your style through a drop-down list. Next to that list are Duplicate, Insert and Modify buttons which take you directly to adding or editing styles.



Since Text Styles are named objects, when you change them one place, every application is updated. So, if you need a one-time override, use the Text Palette (see page 50), and if you need another style, just add one. Just remember they're reusable, so you don't need one style per question!



### Editing Style 1

The internal ID of the Text Style, a unique number since SurveyPro allows you to repeat the name.

### Style Name

Reference name used for the drop-down lists in SurveyPro dialogs. It will not appear on any documents or output.

### TrueType Face

Allows you to select among the TrueType fonts installed on your system. The "Best Sans Serif" and "Best Serif" are primarily designed for Net-

Collect and DirectCollect projects, where the survey is completed on a system whose fonts you cannot control. In these cases, SurveyPro will use the best font available. “Sans Serif” refers to fonts like Arial, and “Serif” fonts like Times.

### Height

Size of the font you will be using. 10-12 points tends to be the most readable range for body type. The note “HTML size” is just a reference for HTML designers, who may want to know how the points are being translated to code.

### Emphasis

Style settings for the Text Style. Note that if you only want a few words to be bold, italic, or colored, you should use the Text Palette overrides.

### Preview

Shows a preview of how your settings will appear.

## Text Palette

Whenever you are in a text field which allows these overrides, the Text Palette will appear. Simply select the text to change, and click in the palette to make edits. In addition to the font formatting, the Text Palette also allows you to insert variables and special characters.



Variables are wild cards such as page numbers which SurveyPro automatically updates with the final values. Inside a dialog they will appear with a ~~strike-through~~, but as soon as you close the dialog and look at the document, you'll see the substituted value. Most variables are applicable to headers and footers, but you may also find them useful for comments in your reports.

To add a variable, click in a text box where you'd like it inserted, click the variable button **#4** on the text palette, and select the variable.

The character map is a convenient way to insert special accented characters or symbols and bullets. When you click the **é** button, SurveyPro will

pop up this palette. Change the font if needed, then click once to insert a character in your text.

## Graphics

A graphic in SurveyPro is anything which is not a scaled question or report figure. In general, graphic tiles behave just like any other tile (see page 39), including editing common attributes of multiple tiles.

Note that titles, headers and footers can be quickly set up using the Document Properties dialog for your questionnaire or report (see page 30). If you need finer control over their design, you can convert those elements to regular graphic tiles for full editing. See also the *Graphic Dialog* on page 46.

### Types of graphics

#### Text

Text can be used for instructions, headings, and notes—anything which will not be collecting or displaying data. You can add borders to a text graphic, so you don't need to overlay text on a box for that effect.

#### Picture

Use pictures to insert logos, icons, or photographs within your document flow. SurveyPro supports BMP, TIF, GIF, JPEG, PCX, DIB and TGA file formats, though only GIF and JPEG should be used for NetCollect surveys.

#### Line

Lines can be used to add divider lines within the page flow, or as accents fixed to the page.

#### Box

Boxes are used only occasionally. More often, a Text or Picture graphic will be inserted, using their Tile tab to add a box around the heading or logo.

### Placing graphics

All types of graphics can be placed in documents three ways:



#### Inline

These behave like question and figure tiles, placed within the main body column of the document. Inline text graphics may be autonumbered, which is useful for section headings and captions to imported picture graphics.



#### Page

Page graphics are fixed to a location on the document, but can be set to appear on multiple pages for use as a header, footer or accent.



#### Anchored

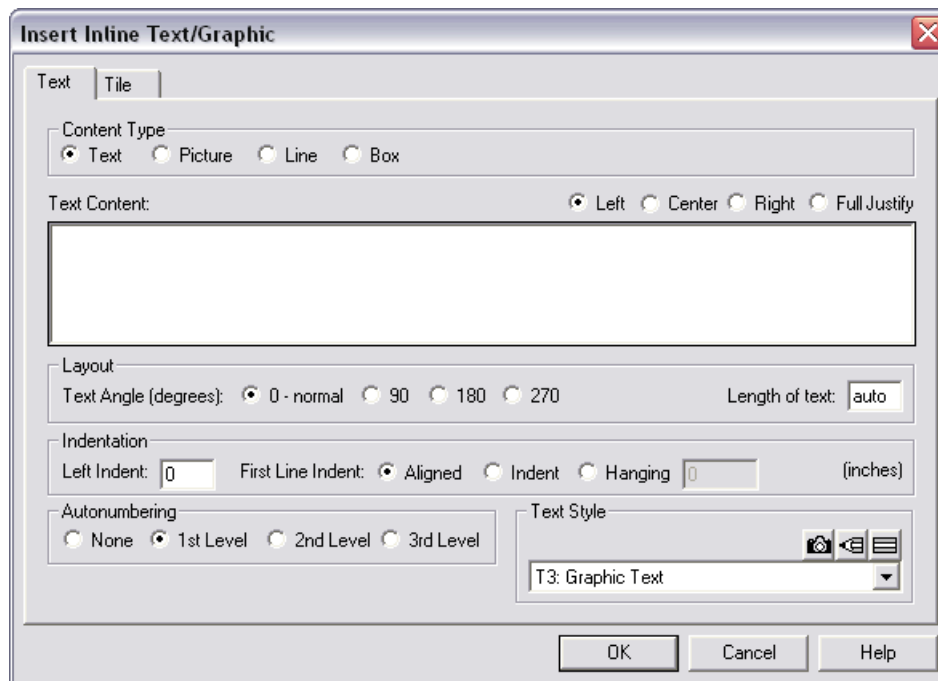
When you need to make a call-out on your project, use an anchored graphic to attach a page graphic to an inline tile. It's great for annotating

figures, and can even include an arrow pointing to a specific location in the inline tile. See page 49.

## Graphic Dialog

With this dialog, the first option you want to set is the **Content Type**. This will rearrange the controls on the screen for Text, Picture, Line or Box graphics. See *Graphics* on page 45 for a description of how to use graphics in SurveyPro, and *Working with Tiles* on page 39 for more on how tiles work in a document.

Note that the dimensions in this dialog change depending on whether you're in a paper document (points, inches) or NetCollect document (pixels).



### Controls for Text graphics

See also the Tile controls on page 48.

#### Alignment

Sets the alignment of the text string within its tile boundaries and indentation settings.

#### Text Content

While in the text box, it will preview all your settings except line breaks. Use the Text Palette (see page 44) to change the typeface, size, color, etc. You can type up to 2000 characters, and multiple paragraphs.



<b>Layout</b>	Text graphics can be rotated in 90 degree increments.
<b>Length of text</b>	By default, the text will fill the width of the tile, but you can use this setting to specify a shorter length.
<b>Indentation</b>	Set indentation for the left margin, as well as special indentation for the first line.
<b>Autonumbering</b>	Autonumber can be applied to all question, figure, and inline text graphic tiles. To activate Autonumber and specify what each level does, see <i>Document Properties</i> on page 30.
<b>Text Style</b>	Text Style for the inline text. Use the Insert pencil point to add new styles for different types of information such as instructions, or modify existing styles to suit your needs. See <i>Text Formatting</i> on page 42.

### Controls for Picture graphics

See also the Tile controls on page 48.

<b>Get Picture</b>	Select the image from a file or paste it from the clipboard.
<b>Preview at 100%</b>	Provides a peek at the image. Note that you should always print your document or publish it to the final format for a completely accurate representation.
<b>Sizing</b>	Allows you to resize the image. Bitmaps should only be resized down, as increasing their size will produce a poor-quality image.

### Controls for Line graphics

See also the Tile controls on page 48.

<b>Width</b>	Set the thickness from 1 point to 18 points.
<b>Length</b>	Sets the length of the line within your tile.
<b>Style</b>	Line styles can be solid or dashed.
<b>Color</b>	Pops up a small palette of colors, and with the Other button brings up the standard Windows color dialog where you can set any color.
<b>Direction</b>	Insert a vertical or horizontal line. For other angles, use a picture graphic.

### Controls for Box graphics

See also the Tile controls on page 48.

<b>Border</b>	Adds an outline to box graphic's tile edge.
<b>Line Width (Pts)</b>	Set the thickness from 1 point to 18 points.

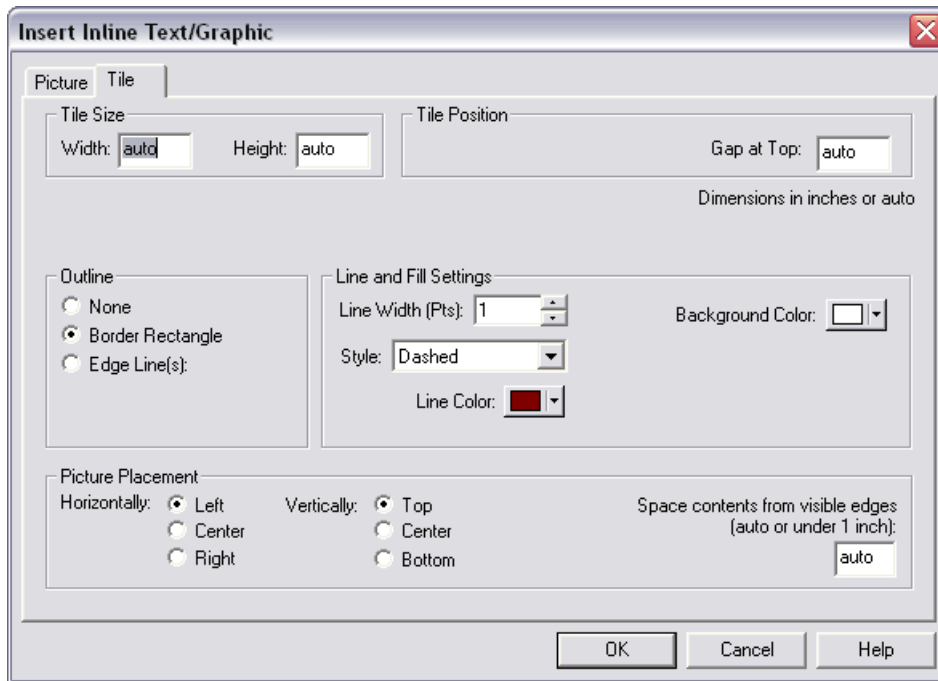
**Style** Line styles can be solid or dashed. With solid boxes a shadow option will also appear.

**Line color** Pops up a small palette of colors, and with the Other button brings up the standard Windows color dialog where you can set any color.

**Background color**

**Tile controls**

With graphics, the Tile tab is where you set dimensions for the tile outline, as well as any boxes or backgrounds for Text and Picture graphics. Not all controls will be available for all graphic types.



**Tile Size** By default, SurveyPro automatically sizes the tile based on the contents, but you can override this with an absolute value.

**Gap at Top** With inline tiles, SurveyPro puts a small gap at the top of each tile to separate it from the previous tile. This setting allows you to override the height of the gap.

**Outline** Adds an outline to the text or picture graphic. The outline will be around the tile edge.

**Line Width (Pts)** Set the thickness from 1 point to 18 points.


**Style** Line styles can be solid or dashed. With solid boxes a shadow option will also appear.

<b>Line color</b>	Pops up a small palette of colors, and with the Other button brings up the standard Windows color dialog where you can set any color.
<b>Background color</b>	
<b>Placement</b>	Sets the text or picture's alignment within the tile border.
<b>Space contents from visible edges</b>	Adds a buffer or margin around all sides of the content.

## Anchor Graphic Dialog

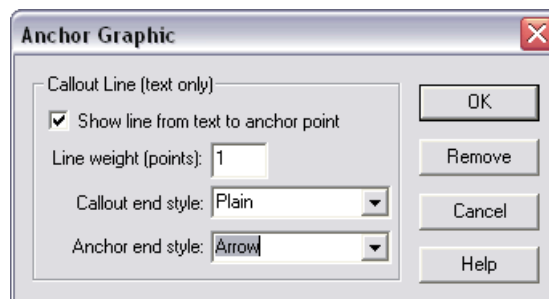
Anchored graphics exist on the graphics layer, so they can overlap inline tiles, but are tied to an inline tile and follow it wherever it goes. One of the most common applications for this feature is call-outs on report figures. These apply only to paper documents, so the option will be disabled for NetCollect surveys and annotations will not be included in reports you Publish to HTML.

### To anchor a graphic:

1. Select one page graphic (at a time)
2. Click the  button or select **Anchor Graphic** from the **Edit** menu
3. If you want the connection to be visible, adjust the **Show line** settings to your preferences
4. Click on the inline tile to which you'd like the graphic attached

You can change the placement of the graphic relative to the inline tile by dragging it. The location of the anchor can also be moved within the inline tile or to another tile.

To remove anchor settings, bring the Anchor Graphic dialog up again and click Remove.



## Page Breaks & Columns

Depending on your layout, there are several tools you may use to adjust the inline tile flow:

**Page size & margins** Set in the Document Properties dialog (see page 30), the “page” size may be in inches for a paper report, or pixels for a Web survey. Margins are also set in this dialog, and settings can be used to create page sizes smaller than your printer offers.

**Columns** The number of columns can be changed from one to three and back at any point in the survey. In the Edit, Breaks dialog select New Section and specify the number of columns. By default, columns have equal width, but that can be changed to custom widths in the Breaks dialog.

Note: If you want to add a short multi-column section within a longer survey, first go to the place where you want to resume your normal layout and insert a New Section (no other settings). Then go to where you want the multi-column section to begin, and add another section break with its changed settings.

For Web surveys, multi-column layouts are generally not recommended. If you do use them, make sure the section is small enough that it fits on the screen without scrolling—even for respondents with small monitors.

**Side-by-side tiles** If you want just a few tiles side-by-side, you can resize individual tiles and manually arrange them. Common applications of this type of layout are city/state/zip blocks, or any time you have a series of short questions and want to reduce white space. For details, see *Working with Tiles* on page 39. If you’re aligning a large number of question tiles, you may want to complete *Building Complex Question Grids* on page 102 as well.

**Page breaks** The Insert menu’s Breaks dialog allows you to insert simple page and column breaks as well as more complex layouts. To remove a break, simply select the tile following the break and turn off the custom break settings.

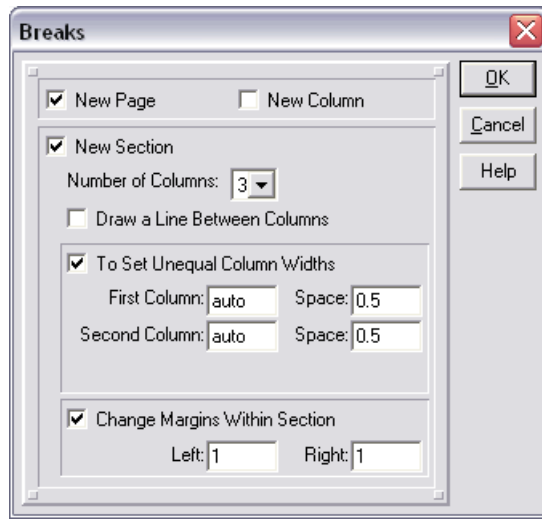
## Breaks Dialog

*Accessed from the Insert menu.*

All breaks are inserted just before the selected tile. **To clear a break** select that tile again, go to the Breaks dialog, and uncheck the options you want to turn off.

These are the options for paper questionnaires. Paper reports only allow single column layouts, though you can place tiles side by side (see page

39). The breaks dialog and page handling for Web questionnaires is somewhat different—see the *NetCollect User Guide*.



- New Page/Column** Starts the selected tile at the top of the next page or column.
- New Section** Creates a new section where you can change the number of columns and/or margins.
- Number of Columns** Sets the number of columns within this section, from 1-4.
- Draw a Line Between Columns** Draws a thin line between the columns, a useful feature for tightly-packed layouts.
- To Set Unequal Column Widths** By default the columns are equally spaced, but you can override this to set custom for some or all of the columns.
- Change Margins within Section** Allows you to override the Document | Properties margins for the current section.
- Tip** If you want to add a short multi-column section within a longer survey, first go to the place where you want to resume your normal layout and insert a new section (no other settings). Then go to where you want the changed area to begin, and add another break with your changes.

# Chapter 5

## Questions, Grids and Scales

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## Understanding Question, Data, Report Linkages

All you did was make a small edit in your survey—you added another checkbox to a custom scale and switched it from single to multiple answer. All of a sudden the data entry screen is different, your report was re-built with new legends, bars and columns, and some figures are grayed out because the statistics you had selected are no longer applicable.



While SurveyPro documents resemble page layouts, in many ways they are closer to database design tools. Everything you do in a questionnaire ripples through the program, and while it's a wonderful thing, this tight interconnection means that you really want to get your survey right before collecting data and beginning analysis. **A little planning can have a huge payoff!**

Unfortunately you can't anticipate for every possibility, so SurveyPro includes tools that let you work with evolving surveys in long-running research projects. It also adapts to many of the other edits which come along in the real world. In the example above, no data was lost even though the structure of the field changed. (Not not all changes are safe, though, so heed your warning messages.)

### Important:

Do not edit your questionnaires while data collection is ongoing, whether via scanning, KeyCollect, DirectCollect, or NetCollect. Doing so creates differences between your SP4 file and your data files, which can generate mismatches in your imports and distort your reports. Only make edits once all data files have been imported, and make a backup copy first.

## Questions and Grids

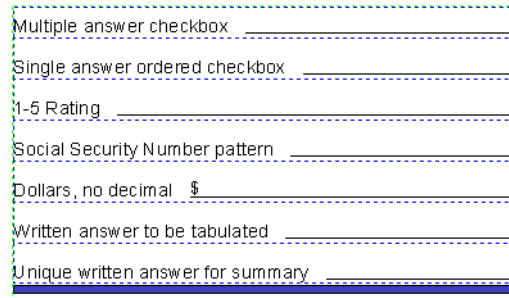
SurveyPro questionnaire documents are constructed from question tiles and graphic tiles. To add a question, use the Insert  toolbar button, selecting either a single question or a grid of multiple questions. If these options are disabled, check to see if you are in the inline editing mode . (See also *Working with Tiles* on page 39 and *Creating a Questionnaire* on page 91.)

A question is fundamentally a database field, with four core attributes:

- Question text, up to 2000 characters
- Report Label, up to 200 characters, for use in lists and reports
- Question number (Q number), an automatically assigned ID
- Scale, the data structure for responses

In addition, there are layout settings for the tile dimensions, scale, indents, and fonts—all of which are tile-specific to accommodate questionnaire documents for different audiences or applications.

New users often make the mistake of treating SurveyPro like a page layout program instead of a database application. Unfortunately, layout is not a reliable gauge of a question’s contents, as you can see from these questions with identical layouts but completely different data structures:



In practice, users wanting a blank for a question will often specify a Written Answer, or even use underscores “\_\_\_\_\_.” Unfortunately, that doesn’t allow SurveyPro to enforce formatting on entry or import, or to manipulate the data properly in reports. So, when you’re setting up your survey, be sure to choose the correct scale structure, not just the right layout. See *Selecting Scales* on page 69 for more.

## Question Grids

Grids let you quickly set up a number of related questions that you can treat as a single tile for editing and layout.

When you define a grid, you’ll enter question text for rows, and select scales for columns. Any scale can be used for grids, so you can do anything from a simple Yes/No checkbox column to detailed tables asking for dozens of data points.

	Excellent	Good	Fair	Poor
A) Food service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B) Number of runs per day	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C) Passenger load/unload time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D) Staff courtesy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E) Timing of ferry schedule	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F) Vehicle load/unload time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Each row/scale combination produces a distinct question. In the example above there are six questions, but if you added another column with an importance scale, you would have twelve fields which could be analyzed independently or as part of a group. SurveyPro automatically creates question groups (see page 228) from each scale column as a starting point for your analysis.

As a survey evolves, or expands to include multiple questionnaire documents (see page 83), some rows and columns may no longer be applicable to your survey. Because the grids are a single unit, you can't remove individual items without deleting your data or affecting all uses of the grid. However, both question rows and scale columns can be selectively hidden or revealed as needed—all without disturbing a single response in your database.

The grid dialog has two modes: Normal one-screen setup and Advanced option screens. The basic mode is all you'll need for many grids, since it allows up to two scales and includes basic layout features. Even if you know you'll need the advanced settings, it's often fastest to rough in the grid using the basic mode, then switch to advanced.

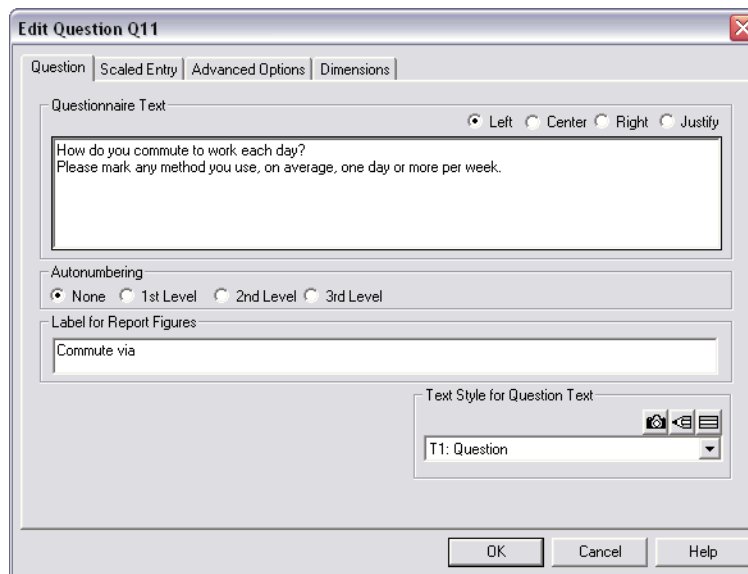
*Creating a Questionnaire* on page 91 inserts a grid, and *Building Complex Question Grids* on page 102 walks through the advanced settings to give you a good feel for your options. The Help system includes detailed information on specific grid dialog controls.

## Question Dialog

The Question and Question Grid (see page 60) dialogs are used to add anything which will collect data. For elements such as titles, subheads, and instructions, use an inline text graphic (see page 45).

When you first insert a question, the dialog will be in “wizard” mode stepping you through each tab. When editing an existing question, all four tabs will be visible.

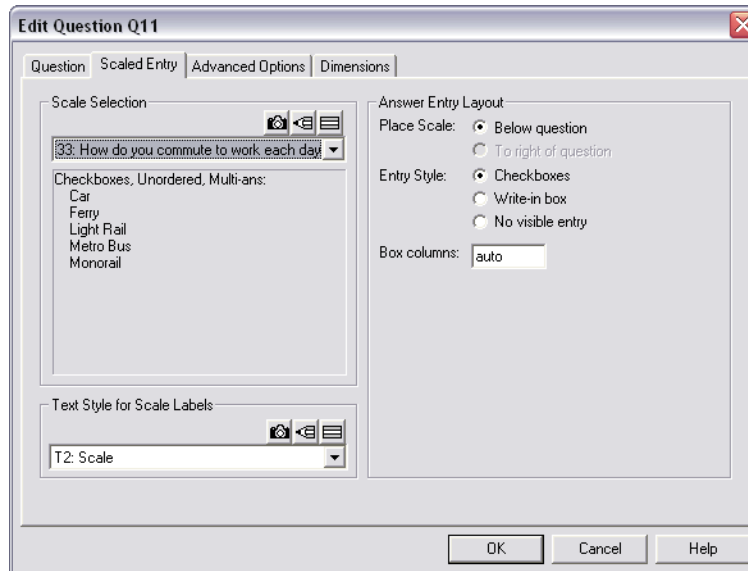
## Question Tab



- Left/Center/Right/Justify** Sets the alignment of the text string within its tile boundaries and indentation settings.
- Questionnaire Text** While in the text box, it will preview all your settings except line breaks. Use the Text Palette to change the typeface, size, color, etc. You can type up to 2000 characters, and multiple paragraphs. This field can be left empty.
- Autonumbering** Autnumber can be applied to all question, figure, and inline text graphic tiles. To activate Autnumber and specify what each level does, go to Document Properties (see page 30).
- Label for Report Figures** The report label is used both in figures and in drop-down lists, so while you can have up to 200 characters, shorter is better.
- Text Style for Question Text** Sets the base style for the question text (scales are set separately). Note that if you only want a few words to be bold, italic, or colored, you should use the Text Palette overrides (see page 44).

## Scaled Entry Tab

Note that some additional scale layout options are in the Advanced tab (see page 58).



### Scale Selection

Select a scale, use the Insert pencil point to add a new scale, or Modify button to edit an existing scale (remember all questions using that scale will be updated too).

### Text Style

Text Style for the scale, which is separate from the style for questions and headings. (See page 42.)

### Answer Entry Layout

The scale layout options are driven by the questionnaire medium (paper, NetCollect, DirectCollect), type of scale, and your Place Scale and Entry Style selections.

## Advanced Options Tab

This tab has additional options for the scale, and which ones appear depends on its underlying structure.

**Edit Question Q11**

Question | Scaled Entry | **Advanced Options** | Dimensions

Checkbox Options

	Checkbox in Tile Order	Hide	Break
1	Car	<input type="checkbox"/>	<input type="checkbox"/>
2	Ferry	<input type="checkbox"/>	<input type="checkbox"/>
3	Light Rail	<input type="checkbox"/>	<input type="checkbox"/>
4	Metro Bus	<input type="checkbox"/>	<input type="checkbox"/>
5	Monorail	<input type="checkbox"/>	<input type="checkbox"/>

Other Box and Blank Full Width

Ordering

Per Scale  Reversed  Randomize  Drag & Drop List Above

Note: These affect the order in this tile only. Edit the shared scale to re-order all its uses.

Boxes Checked - Minimum:  Maximum:

OK Cancel Help

### Checkbox Tile Order

Lists the checkboxes in your scale, by default in the same order as the scale definition. While you can type over the labels in this area, those changes will not be saved—edit the scale instead (see page 69).

### Hide

When you have an unordered scale, you can hide boxes that have data in the database but which are no longer used.

### Break

Mark to override the column breaks in checkbox layouts.

### Other Box and Blank Full Width

By default the Other blank extends across all columns of your checkbox scale. Turn off to have the Other blank in only one column.

### NetCollect n/a box

Override the Document Properties setting for the n/a option. See the *NetCollect User Guide* for more.

### Ordering

Reverse (flip), randomize, or manually reorder the answers within the scale. The options available depends on whether the scale is ordered or unordered.

### Dot Fill

Override the Document Properties setting for dot fill between questions and scales placed to their right (see page 36).

### Boxes Checked

Set minimum and maximum boxes allowed for multiple answer checkbox scales.

### Respondent must answer

Requires an answer to the question.

## Dimensions Tab

Dimensions includes settings for the size of the tile and layout within.

Note that several of these controls are dependent on the scale layout (below or to left of question, checkboxes vs. written answer), so if an option you want is missing, check the Scaled Entry tab (see page 57).

### Tile Width

By default, SurveyPro automatically sizes the tile to fit the margins, but you can override this with an absolute value.

### Question Text Left/Right Indent

Indents the question text from the tile's left and right edges.

### First Line Indent

Allows a different indentation for the first line, either further indented from the left margin, or "hanging" to the left of the margin.

### Scale Entry Left Indent

Indents the scale from the question's left margin.

### Down from Top

With inline tiles, SurveyPro puts a small gap at the top of each tile to separate it from the previous tile. This setting allows you to override the height of the gap.

### Below Question

Adjusts the small gap SurveyPro places between the scale and question.

### First Box from Left Box Steps

These layout details vary depending on the scale type and layout. In general, they are used to fine-tune the placement of the scale, spacing of checkbox columns, size of text boxes, etc.

## Question Grid Dialog

Question Grids set up multiple items with one or more measurement scales. The scales can be any structure, from checkbox to numeric, and mixed within the grid. Grids also automatically create Question Groups (see page 228), for easy analysis. See also *Questions and Grids* on page 53.

Even if you know you're going to need some of the advanced layout options, it's usually fastest to rough in your grid with the two quick setup tabs. When you're done with them, switch the setting on the first tab to advanced.

### General Tab

The General tab sets the primary layout style and the reporting label for the grid. It also gives you the choice of the Quick or Advanced setup method. You can go from Quick to Advanced at any time, but once you have used an Advanced feature the Quick option will no longer be available. You'll also have fewer options if you're editing the questions or scales of a grid across questionnaires (versus the layout in one questionnaire).

**General**

Setup Level

Normal one-screen setup  
 Advanced option screens

Grids ask for input on several questions on one or more issues at once, like "Ratings" or "Importance/Performance". Questions are the rows and the columns are answer scales.

Label for Report Question Grid: Ratings

Grid Style

No borders or tints  
 Horizontal divider lines  
 Full grid border lines  
 Alternating tinted bands

	Excellent	Good	Fair	Poor
<b>Products</b>				
Selection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Sales Staff</b>				
Courtesy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

< Back   Next >   Finish   Cancel   Help

#### Setup Level

The Normal one screen setup is the fastest way to create a grid, then use the Advanced option to access additional controls.

#### Label for Report Question Grid

Grid names are the basis of question group names, so this may appear in your reports.

**Grid Style**

This sets the basic style of your grid—you can control some finer points in the Advanced tabs.

**Quick Set Tab**

The screenshot shows the 'Edit Question Grid' dialog box with the 'Quick Set' tab selected. The dialog is titled 'Edit Question Grid' and has a close button (X) in the top right corner. It contains two tabs: 'General' and 'Quick Set'. The 'Quick Set' tab is active and displays the following elements:

- One or more Question Rows:** A table with 6 rows and 2 columns. The first column contains numbers 1 through 6. The second column contains the text 'Service', 'Value', 'Selection', 'Location', 'Hours', and an empty row. To the right of the table are three icons: a plus sign, a pencil, and an eraser.
- Column 1 (required):** A section with a 'Scale' dropdown set to 'S12: 1 Low to 5 High Rating', a 'Label' text box containing 'Importance to You', and an 'Entry' dropdown set to 'Circle-the-answer'. Below the entry dropdown is a 'Horizontal Above' dropdown. At the bottom are buttons for 'Insert New Column 1' and 'Delete Column 1'.
- Column 2 (optional):** A section with a 'Scale' dropdown set to 'S12: 1 Low to 5 High Rating', a 'Label' text box containing 'Our Performance', and an 'Entry' dropdown set to 'Circle-the-answer'. Below the entry dropdown is a 'Horizontal Above' dropdown. At the bottom are buttons for 'Swap 1<->2', 'Add Column 2', and 'Delete Column 2'.
- Buttons:** 'OK', 'Cancel', and 'Help' buttons are located at the bottom of the dialog.

**Question Row Labels**

Type and edit entries directly in the list, or using the larger type-in box. Enter will drop you down to the next item (or add a new one), or you can use the plus, insert, and delete buttons to change items. To rearrange items, click on the gray box at the left of the row once to select it, then click and drag, releasing when the red line is where you want the item to go. The three buttons to the right are used to edit items in the list. The plus sign adds a new item at the end of the list; the Insert pencil point adds an item above the currently selected one; the Delete eraser removes the current item.

**Scale**

Select a scale, use the Insert pencil point to add a new scale, or Modify button to edit an existing scale (remember all questions using that scale will be updated too).

**Label**

Optional column heading centered above the scale labels. The Advanced tabs include options for repeating the headings and formatting the text style.

**Entry**

Layout options for the selected scale.

**Column Buttons**

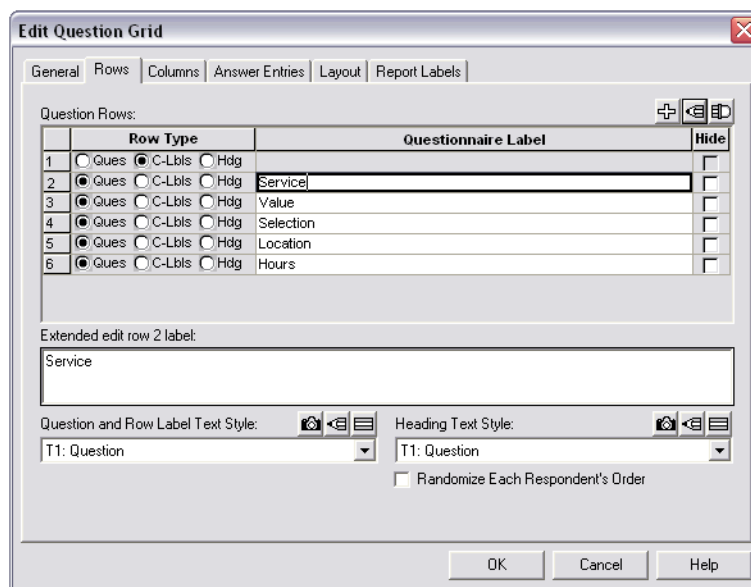
Rearrange, add, and remove the scale columns. If you need more scales or greater flexibility, use the Advanced tabs.

## Rows Tab (Advanced Setup)

In the Quick Set dialog, the rows you enter are all scaled questions using the default font settings. Here you can have:

- Questions: “Ques.”
- Column labels: “C-Lbls,” are the optional headings and scale labels from the Columns tab. Repeating column labels is particularly useful with NetCollect surveys where the headings can scroll off-screen on larger grids.
- Headings: “Hdg,” are informational text you can add to separate different question categories.

You can vary the style of questions and headings by using the Text Palette which appears when typing in the larger box (see page 44). Note that the Base Text Style for Questions and Headings can be different.



### Row Type

Set whether the row is a scaled question, column labels, or headings.

### Questionnaire Label

Type and edit entries directly in the list, or using the larger type-in box. Enter will drop you down to the next item (or add a new one), or you can use the plus, insert, and delete buttons to change items. To rearrange items, click on the gray box at the left of the row once to select it, then click and drag, releasing when the red line is where you want the item to go.

### Hide

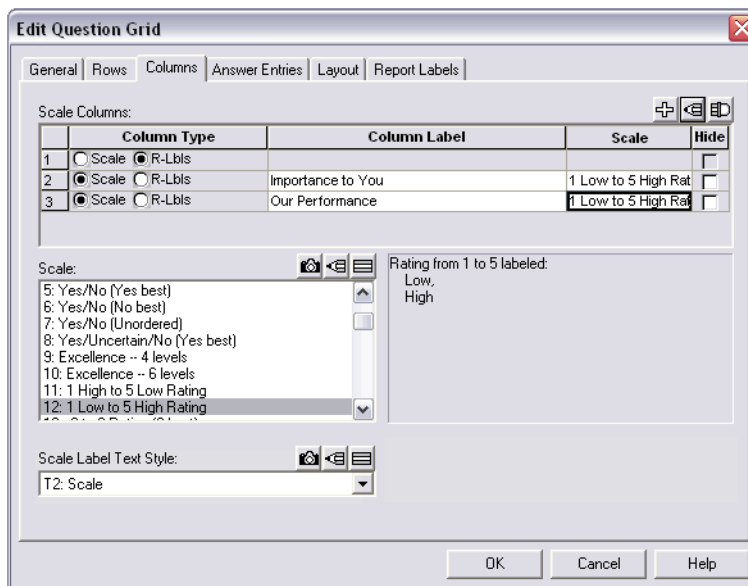
As your questionnaire evolves, or if you have multiple questionnaire documents, you can hide elements which do not apply.



- Extended edit** Lets you work more easily with longer labels, as well as enhancing selected words with the Text Palette (see page 44).
- Question and Row Label Text Style** Sets the style of the questions in your rows.
- Heading Text Style** Lets you set a different style for any rows designated as Hdg.
- Randomize Each Respondent's Order** Randomizes the row order to reduce order biases. This is best applied with NetCollect or DirectCollect surveys where it is randomized for each respondent—paper forms will only randomize on Print.

## Columns Tab (Advanced Setup)

This tab stacks up the columns in your grid. By default, the first column is the row labels “R-Lbls,” but they can be moved to the middle, right column, or repeated within the grid. Each scale is considered a column, even if it contains multiple columns for the checkbox or rating entry. You can also add scales beyond the two allowed in the Quick Set dialog.

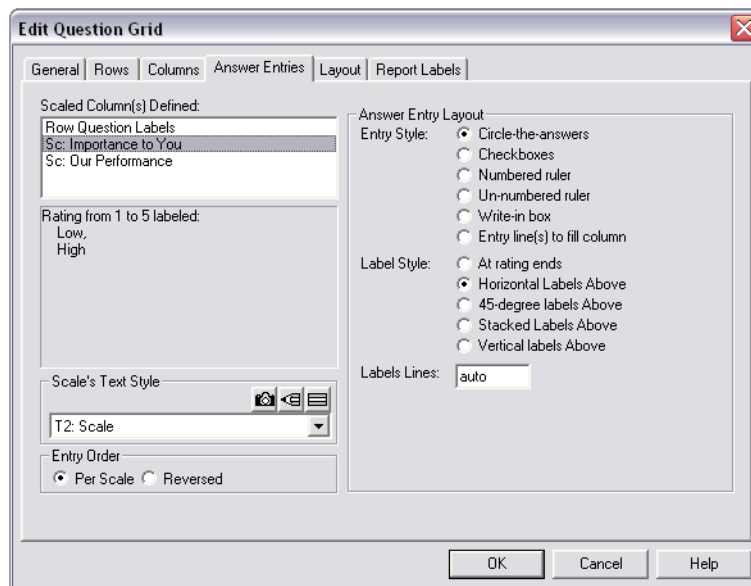


- Column Type** Set whether the column is the question labels or a scale column.
- Column Label** Type and edit entries directly in the list, or using the larger type-in box. Enter will drop you down to the next item (or add a new one), or you can use the plus, insert, and delete buttons to change items. To rearrange items, click on the gray box at the left of the row once to select it, then click and drag, releasing when the red line is where you want the item to go.

- Scale** Displays the scale for the row. Select the scale from the list that appears when you click in the cell.
- Hide** As your questionnaire evolves, or if you have multiple questionnaire documents, you can hide elements which do not apply.
- Scale Label Text Style** Sets the style of your scale labels in the columns.

## Answer Entries Tab (Advanced Setup)

This tab is devoted to the layout of your grid's scales. Be sure you've set the Document Properties to the correct medium before getting too detailed.

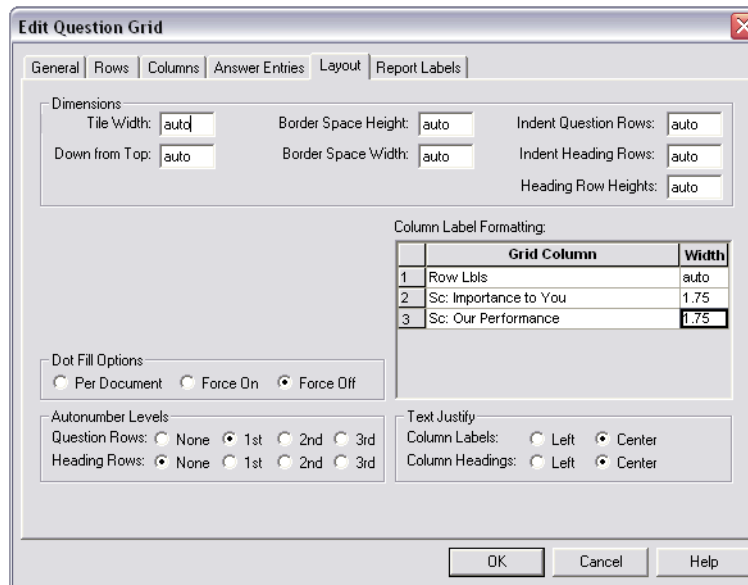


- Scaled Column(s) Defined** Every element in this screen is driven by the item you have selected in this list.
- Answer Entry Layout** The scale layout options are driven by the questionnaire medium (paper, NetCollect, DirectCollect), scale structure, and the selection in the first set of layout radio buttons.
- Scale's Text Style** Text Style for the scale labels, which is separate from the style for questions and headings.
- Entry Order** Lets you choose the layout order for elements in the scale: Per Scale, Reversed, or Randomized. Note that the Per Scale layout of the scale is normally from the first box at the left to the last at the right. Reversed is the opposite order of Per Scale.

**Forced Sum** Appears in NetCollect documents, allowing you to set a total for the selected scale column. Error notices are specified in the Answer Tests dialog.

## Layout Tab (Advanced Setup)

Additional layout items which apply to the grid overall.



**Tile Width** By default, SurveyPro automatically sizes the tile based on the contents, but you can override this with an absolute value.

**Down from Top** With inline tiles, SurveyPro puts a small gap at the top of each tile to separate it from the previous tile. This setting allows you to override the height of the gap. This is most often overridden to 0 in order to close up the gap between a grid and its instructions.

**Border Space Height/Width** Borders are the padding between rows and columns.

**Indent Question/Heading Rows** You can set different indentation levels for the question and heading rows. Both are from the left tile edge.

**Heading Row Heights** By default heading rows are the same height as questions, but you can set a value up to 1 inch.

**Line Between Scales** Adds a vertical line between the scales. NetCollect surveys only.

**Column Label Formatting** Allows you to specify the width of each column in the grid, including the question column.

**Dot Fill Options**

For this grid, choose whether to leave the dot fill (.....) Per Document (to match the document's default setup), Force On (no matter what the default is), or Force Off. See page 36.

**Autonumber Levels**

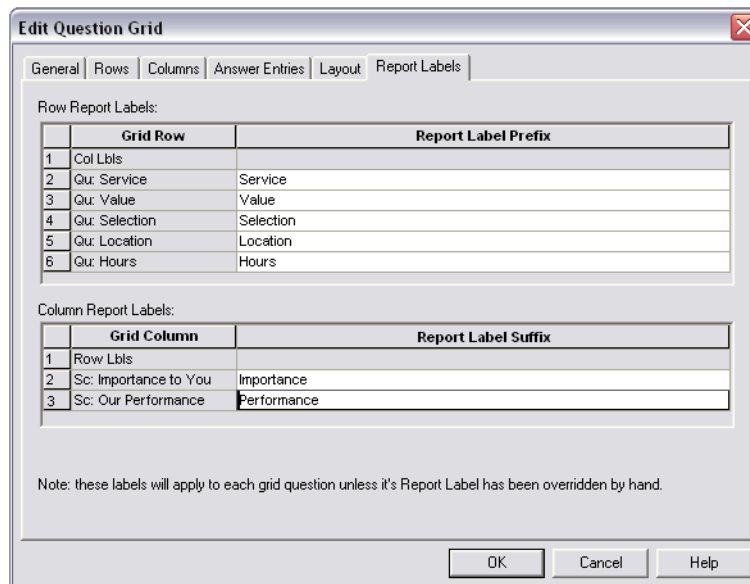
Autonumber can be applied to all question, figure, and inline text graphic tiles. To activate Autonumber and specify what each level does, go to Document Properties (see page 38).

**Text Justify**

Change the alignment of column headings (question columns are left aligned).

**Report Labels Tab (Advanced Setup)**

Each grid row creates a data field with a SurveyPro Q code for each scale used, so in this example, with 5 question rows and 2 scale columns, there will be a total of 10 fields, each one of which needs a unique report label. By default, SurveyPro generates these labels by combining the row prefix with the column suffix. Of course, if you only have one column, this isn't a critical setting.



**Row Report Labels**

Lists the text of the question in the row, and allows you to override that with a report label prefix for the row.

**Column Report Labels**

When a grid has more than one column, each you can set a suffix to each row to indicate what aspect is being measured.

**Note about overrides**

Labels set in this tab can be overridden through the Edit menu's Report Labels on a question-by-question basis (see page 248). Once you have set your own report labels, they do not change if you later change the grid's

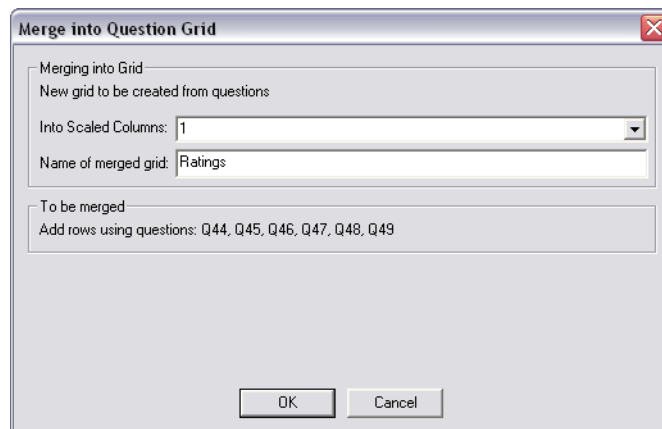
labeling. You can re-set them to the defaults in the Report Labels dialog. See also Question Groups on page 228 for changing the labels in specific figures.

## Merge into Question Grid

This can be used to merge one or more grids into a single grid, or one or more questions into a grid (particularly helpful with SurveyPro 2.0 files). The advantage of this function is that it can be used with questions that have data.

Create a backup copy of your file before making these changes, and do not make any questionnaire edits while data collection is ongoing. Note that you can create Question Groups for reporting from individual questions (see page 228).

Select the questions or grids you want to combine, then Edit menu, Merge into Grid.



### Into Scaled Columns

In most cases, this will be one column. However, if your individual question tiles alternate scales you can specify a dual scale grid. If your questions contain data, make sure they end up in the columns you expect.

### Name of merged grid

The name of the question grid. Used as part of the name in the automatic question groups, and can be edited after the new grid is created.

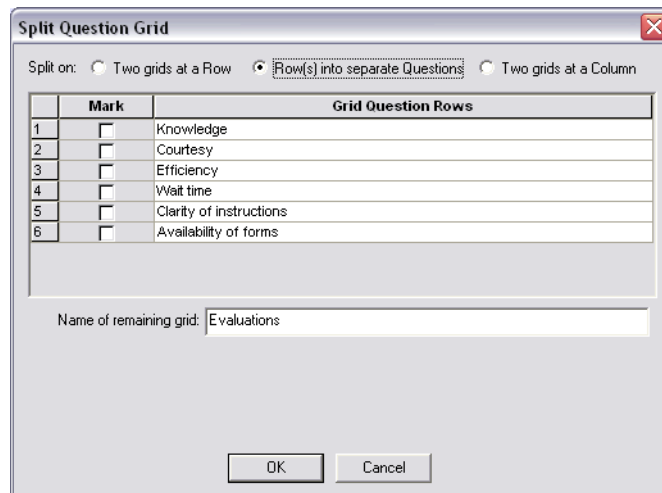
## Split Question Grid

Since question grids must fit on one page, this is a way to divide a grid into two grids or individual question tiles. You can apply this to questions that have data.

If you're conducting Web surveys and simply want the headings to stay visible as the respondent scrolls, you can add C-Lbls rows to your grid to repeat the headings (see page 62).

Create a backup copy of your file first, and do not make any questionnaire edits while data collection is ongoing. Note that you can create Question Groups for reporting from individual questions (see page 228).

Select the grids you want to divide, then Edit menu, Split Grid.



### Split on

You can divide a grid into two sets of rows or two sets of columns. For this division, mark the row or column which will be the first one in the new grid. If you need to split into more than two grids, just repeat the Split command.

You can also extract individual question tiles from a grid, marking all the questions you want to pull out.

### Name of grids

The name of the question grid or grids. Used as part of the name in the automatic question groups, and can be edited after the split.

## Selecting Scales

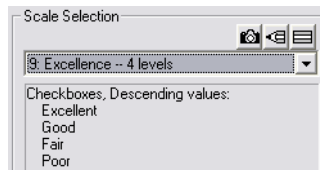
A scale is the structure of a question, from a Yes/No “checkbox,” to written answers, to dates. The two questions to ask when selecting a scale are:


*What’s the best respondent experience?*

*How am I analyzing this data?*

Usually these questions produce the same scale, but in cases when they don’t, Rescales are there to bridge the gap (see page 216).

To insert and edit scales, you can use the Insert menu, the Object Tree (see page 15), and most commonly, dialog boxes where you select scales:



You can also insert a copy of a scale through the Object Tree or the duplicate button  in a dialog. Note that scales are named components, so once one is defined you can apply it as many places as you need, and edits to one instance will update all questions using the scale.

SurveyPro includes 32 common scales for use as-is or with modifications, as well as several structures for adding your own custom scales.

### Unordered scales

These scales consist of answers or options which are not inherently related. For example, New York is not better or worse than Los Angeles, and one person's comment is not greater or less than another. In SurveyPro, they include:

- Long Non-Repeating Written Answers
- Short Countable Written Answers
- Pattern Scales
- Unordered Checkboxes

## Ordered scales

Ordered scales consist of items which have an inherent relationship, such as Excellent/Good/Fair/Poor, -3 to 3, or dates. Often, the spacing between the options is consistent (the fourth option has twice the value of the second), though that is not required. SurveyPro's ordered scales are:

- Ranking Scales
- Ordered Checkboxes
- Rating Scales
- Date/Time Scales
- Number Scales

Most of the scales will quickly become familiar, especially if you complete a few tutorials. This table's detailed breakdown is primarily for your reference and for troubleshooting. For an explanation of the analysis terms, see *Statistics in SurveyPro* on page 207.

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### Long Non-Repeating Written Answers

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Applications	Comments, essays, and other unique long responses. Can also be used for shorter items, such as the respondent's name or address, which you do not expect to be repeated.
Layouts	Write-in blanks or type-in boxes.
Analysis	Bulleted lists. You can use Rescales to extract keywords, but that it is more effective to add a short written answer scale and manually postcode responses into categories (see page 125).

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### Short Countable Written Answers

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Applications	Departments, products, locations, and other items where you expect respondents to repeat answers. The Multiple Answer version of this scale is used when respondents may provide several answers to the question, such as products they use. These scales may be paired with a long comment to postcode a respondent's comment.
Layouts	Write-in blanks or type-in boxes
Analysis	Counts and percentages. May also be used in crosstabs and Form Selects to analyze sub-groups (see page 212). For best results, countable written answers should be "cleaned" during entry or import (see page 123) so SurveyPro has consistent responses to tabulate.

---



<b>Pattern Scales</b>	
Applications	Telephone numbers, social security numbers, Zip codes, IDs.
Layouts	Write or type-in blanks, pattern boxes, bubble grids, barcodes.
Analysis	Same as written answers—the type of written answer is specified in the pattern scale definition.
<b>Unordered Checkboxes</b>	
Applications	Products, locations, interests, services. Unordered checkboxes can accept single or multiple answers, and may include an Other blank for less frequently used responses.
Layouts	Checkboxes, drop-down lists, or write-in blanks.
Analysis	Counts, percents, confidence interval cross-tabs, chi-square. "Other" responses are tabulated with the checkboxes by default.
<b>Ranking Scales</b>	
Applications	Relative importance of items being evaluated, such as features, issues, services. Does not provide information on how much more important one item is than another. Note some features, such as using each number only once, are only enforced in grids.
Layouts	Checkboxes, write-in blanks, circle-the-answer, drop-down lists.
Analysis	Counts, percents, mean, weighted mean, median, top/bottom boxes, cross-tabs, chi-square.
<b>Ordered Checkboxes</b>	
Applications	Excellence, importance, agreement/Likerts.
Layouts	Checkboxes, circle-the-answer, write-in blanks, drop-down lists.
Analysis	Counts, percents, mean, weighted mean, standard error of the mean, median, top/bottom boxes, cross-tabs, chi-square.
<b>Rating Scales</b>	
Applications	Excellence, importance, agreement, Stapels, semantic differentials. Only allows labels at ends and midpoint.
Layouts	Checkboxes, circle-the-number, rulers, drop-down lists, write-in blanks.
Analysis	Same as ordered checkbox.

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**Date/Time & Number Scales**


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Applications	<p>Birth date, time of visit, income, age, and other values which will be used in calculations. A pattern can be applied to enforce a custom format of the response.</p> <p><b>Not</b> for use with IDs, SSNs, Zip codes, or telephone numbers (use pattern or written answer).</p>
Layouts	Write or type-in blanks, pattern boxes, bubble grids.
Analysis	Everything, though some actions such as crosstabs require responses be binned into groups through the Figure dialog or a Rescale.

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## Scale Dialog

Because SurveyPro structures its questionnaires and database from the scale definition, it impacts:

- Layout options
- Respondent experience for DirectCollect and NetCollect surveys
- Data import and entry
- Analysis options

There are a wide range of Tech Support reporting calls where the first step is to go back to the scales of the questions involved, so an investment in getting your scales right is well worth the time. In fact, Tech Support is more than happy to check subscribers' questionnaires for structural issues—before you distribute copies to everyone.

If you're new to surveying, start with *Selecting Scales* on page 69 to learn about the impact they have on your reports. Experienced researchers may want to review *Modifiers & Rescales* on page 216 and *Postcoding* on page 125 for some of the advanced manipulations you can perform.

### Common Elements

<b>Name</b>	By default, SurveyPro puts the question label in for your scale name, but it can be anything. The name is just for reference in dialogs, so shorter is better.
<b>Type</b>	The scale type can have a significant impact on your layout options, data input, and analysis, so if you're not sure which one you need see <i>Selecting Scales</i> on page 69.

## Checkboxes

Checkbox scales are the most common custom scales, used for both ordered information such as importance, and unordered lists such as locations.

Note that this dialog is a composite, with some options only available for unordered or ordered scales.

	Label	Hdg	Lgd	Val
1	Outstanding	<input type="checkbox"/>	1	1.0
2	Great	<input type="checkbox"/>	2	2.0
3	Good	<input type="checkbox"/>	3	3.0
4	Fair	<input type="checkbox"/>	4	4.0
5	Poor	<input type="checkbox"/>		

### Box Statistical Values

An unordered scale is used for scales such as locations, names, or products, where one option is not better or worse than the others. The other 3 options are different ways of approaching ordered scales (like importance), and their values are used in reporting to calculate means and set axis labels.

### Answers Single/Multiple

Unordered checkbox scales can be single or multiple answer. With multiple answers, you can specify minimum and maximum numbers of boxes that can be marked while Publishing some document types.

### Add Other Blank

Unordered scales can have an Other blank which adds a checkbox and text box. The Other label is set in the Document Properties dialog.

### Add Explicit N/A

Differentiates a missing response from Not Applicable. Not Applicables are also automatically dropped from mean calculations of ordered scales. The NA label is set in the Document Properties dialog (see page 36).

### Automatic Legends

By default SurveyPro uses a simple alphanumeric legend for reports, but you can override this with your own 1-2 digit labels.

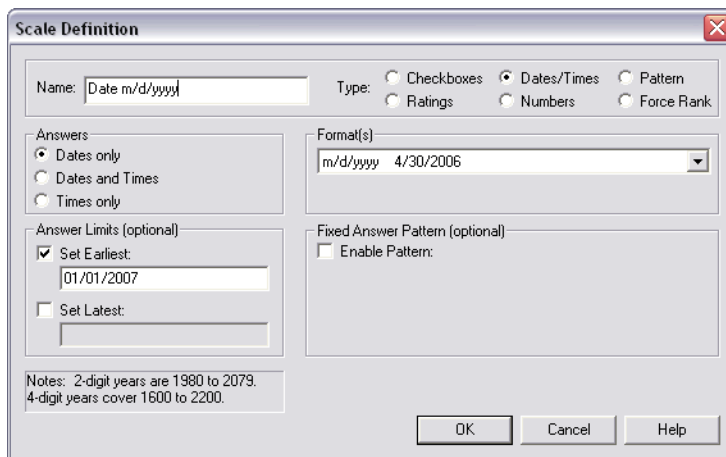
### Sorts Box 1 as Best/First

Applies in analysis when you're working with top box and bottom box settings, and simply tells SurveyPro whether you consider the first answer to be best (top) or worst (bottom).

- Label** Type and edit entries directly in the list, or using the larger type-in box. Enter will drop you down to the next item (or add a new one), or you can use the plus, insert, and delete buttons to change items. To rearrange items, click on the gray box at the left of the row once to select it, then click and drag, releasing when the red line is where you want the item to go. Labels can be up to 200 characters.
- Hdg (Heading)** Unordered scales can have headings intermixed with scale items. This is useful for longer scales and multiple answers containing multiple categories of information.
- Lgd (Legend)** To activate this type-in area, turn off automatic legends. You can enter one or two alphanumeric digits.
- Val (Values)** Values used for calculating means and other analysis functions. You can activate this column by turning on Set Own Values. In addition, you can use Rescales to modify the values without editing the underlying scale.
- Extended Edit** While in the text box, it will preview all your settings except line breaks. Use the Text Palette to change the typeface, size, color, etc. You can type up to 200 characters in a single line/paragraph.

## Dates/Times

Dates and times can be in almost any format, and the format can be modified at any time without affecting the data (unless you change whether it's looking for a date or time). SurveyPro is somewhat flexible on entry, recognizing variations as long as they are in the same order or unambiguous.



- Answers** Date/time scales can include both measures, or just a date or time.
- Format(s)** Select from the drop-down lists the formats you'd like for dates and times.

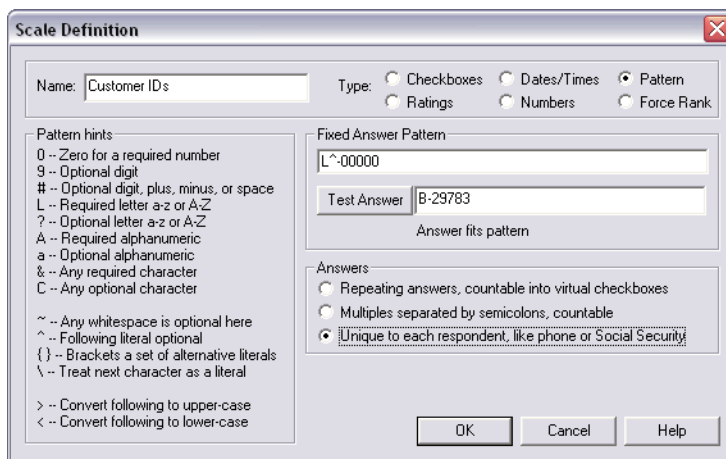
**Answer Limits** Set the minimum and/or maximum acceptable responses to the question by entering values in the same format as your scale. These will be enforced during data collection.

**Enable Pattern** You can apply a pattern to a date scale. See the next section.

**Pattern**

Pattern scales are saved internally as written answers, but screened on collection to match a set format. Once input and reformatted by SurveyPro, the information stored is exactly what you see on the screen. Before you define your own pattern, check the scale list as the most common ones are pre-defined in SurveyPro.

The pattern codes are similar to Microsoft Access' input masks, with some enhancements for greater flexibility of input.



**Pattern Hints** Reference of pattern characters.

**Fixed Answer Pattern** Type-in box for the pattern.

**Test Answer** Type an answer you think should or should not be accepted, and click the Test Answer button. An message will appear saying if the entry was OK, or if there was a mismatch at a character number.

**Answers** Patterns are based on written answers, and these options correspond to the 3 types. The first two options can be autopostcoded (tabulated) by SurveyPro, and are useful for Zip, organization, and similar codes, while the third assumes values are unique or seldom repeated. Uniqueness will not be enforced unless the question is set as a password field.

## Example Patterns

To get you started, here are some sample patterns (several built in to SurveyPro). The first acceptable answer listed is the format in which data will be stored.

<b>Pattern</b>	<b>Acceptable Answers</b>
<code>^(~000~{-}. )^ ~000~{-}. }~0000</code>	(206) 555-1212 206-555-1212 206 555-1212 206.555 1212
<code>000~^--00~^--0000</code>	555-88-1234 555881234 555 88 1234 555 - 88 - 1234
<code>00000~^--9999</code>	98103-1234 98103 98103 1234 98103 - 1234
<code>&gt;LLLL~^#\#~009999</code>	ABCD#123456 abcd 12 aBcD # 1234
<code>{\A\ a}{\X\ x}~^--0000</code>	AX-1234 ax1234 aX - 1234

## Ratings

Rating scales are used for semantic differentials and other ordered scales.

### Answer Range

Endpoints can be from any low to high numeric values, including ranges around 0 such as -3 to +3.

### Reports sort minimum as best/first

Applies in analysis when you're working with top box and bottom box settings, and simply tells SurveyPro whether you consider the first answer to be best (top) or worst (bottom).

### Add Explicit N/A

Differentiates a missing response from Not Applicable. Not Applicables are also automatically dropped from mean calculations of ordered scales. The NA label is set in the Document Properties dialog (see page 36).

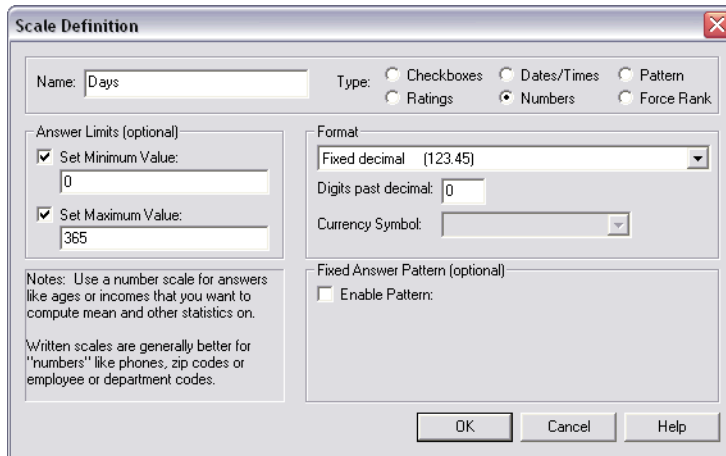
### Labels

Rating labels are optional, and can be placed at the ends and midpoint of the scale. If you need to label all the levels, use an ordered Checkbox scale (see page 73).

## Numbers

Number scales should only be used for fields which are going to be computed, such as income or age. SurveyPro stores 6-7 significant digits internally, so if you're collecting data on very large numbers we recommend changing the units, and asking respondents to provide answers in thousands or millions.

For IDs, zip codes and other values which may be numeric but are not computed, use pattern (see page 75) or written answer scales (see *Selecting Scales* on page 69.)



**Answer Limits**

Set the minimum and/or maximum acceptable responses to the question by entering values in the same format as your scale. These will be enforced during data collection.

**Format**

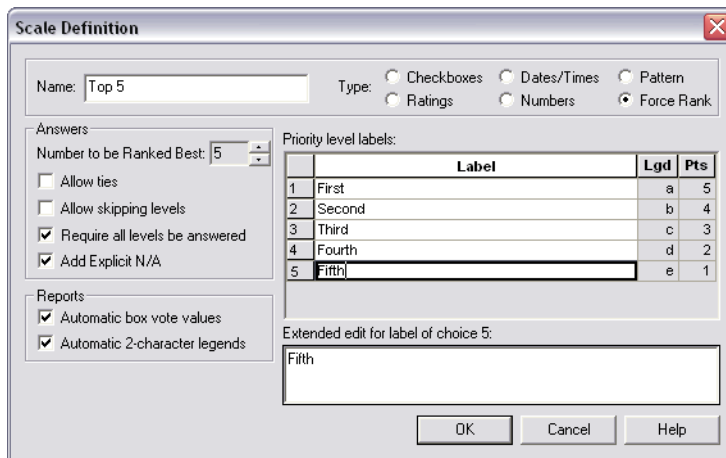
There are assorted formats for displaying the numeric data (it's always stored simply as a number). When a currency format is selected, you can change the symbol used.

**Enable Pattern**

You can apply a pattern to number scales. See *Pattern* on page 75.

**Force Rank**

Forced rank scales are used almost exclusively with question grids, where SurveyPro can enforce the answer tests. Note that you can have 8 items in your question grid, and ask respondents to rank their top 3.





<b>Number to be Ranked Best</b>	Set the number of ranking levels with the up and down arrows.
<b>Allow ties</b>	By checking this you will allow respondents to mark 1, 2, 2, 3 and similar entries. This can be a good option with paper surveys where the answers cannot be enforced when the respondent is completing the survey.
<b>Allow skipping levels</b>	Allows respondents to mark “1, 2, 4” and similar entries. As with allowing ties, this can be a good setting for paper surveys.
<b>Require all levels be answered</b>	Enforces the completion of each ranking level.
<b>Add Explicit N/A</b>	Differentiates a missing response from Not Applicable. Not Applicables are also automatically dropped from mean calculations of ordered scales. The NA label is set in the Document Properties dialog (see page 36).
<b>Automatic box vote values</b>	Turn this off to set custom values in the Points column.
<b>Automatic Legends</b>	By default SurveyPro uses a simple alphanumeric legend for reports, but you can override this with your own 1-2 digit labels.
<b>Label</b>	If you need to add or remove ranking levels, adjust it at the left. Type labels directly in the list, or using the larger box below. Labels can be up to 200 characters.
<b>Lgd (Legend)</b>	To activate this type-in area, turn off automatic legends. You can enter one or two alphanumeric digits.
<b>Pts (Points)</b>	Values used for calculating means and other analysis functions. You can activate this column by turning off Automatic box vote values. In addition, you can use Rescales to modify the values without editing the underlying scale.
<b>Extended Edit</b>	While in the text box, it will preview all your settings except line breaks. Use the Text Palette to change the typeface, size, color, etc. You can type up to 200 characters in a single line/paragraph.

## REFERENCE

# Chapter 6 Questionnaires

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## Designing for Specific Media

The steps to create a questionnaire for paper, scanning, Web and screen are the same—the only differences are in the details of the content and layout. SurveyPro projects can contain surveys with multiple questionnaire documents for cases when you need to use multiple media. The same question (based on Q number) appearing in multiple documents will save data to just one field. Of course you can break the data apart for analysis by document if you wish. See *Multiple Questionnaire Documents* on page 83 for details on working with linked questions.

Different media have different strengths and weaknesses, so depending on your audience one medium may have a significant advantage over the others. This table provides a brief summary of their attributes.

Medium	Pros	Cons
Paper surveys for keyed entry	Anonymous Reaches widest audience Most flexible layouts	Slow turnaround Answer format not enforced at time of response Data entry costs
Scanned surveys	Anonymous Reaches wide audience Fast, automated entry	Slow turnaround Answer format not enforced at time of response Start-up investment in scanner, software, time Some systems require particular form layouts Handwritten responses still require keyed entry
NetCollect Web surveys	Fast turnaround Reaches wide audience Industry-standard technologies	Less anonymous (real or perceived) Potential ballot box stuffing without unique passwords Uncontrolled respondent environment (layouts flex on different systems)
DirectCollect E-mail/LAN/Kiosk surveys	Fast turnaround Interactive interface	Less confidential (real or perceived) Some e-mail systems block EXE files Requires Windows 95/98/NT/2000/XP
DirectCollect telephone surveys	Fast turnaround Interactive	Long/complex surveys difficult for respondents Interviewer costs

## Skips and Branches Dialog

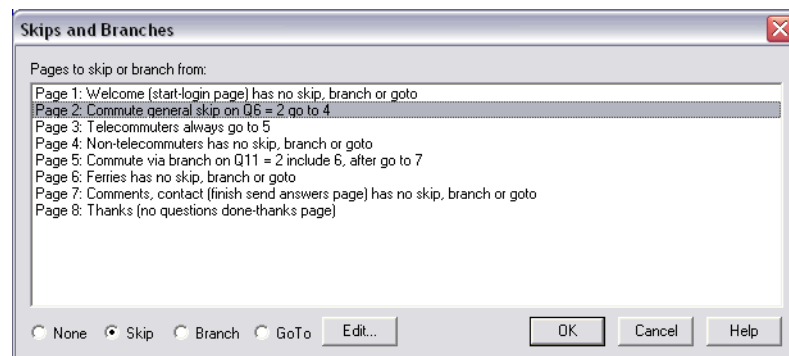
Skips and branches allow you to direct a respondent's experience based on his or her responses. They are best used with NetCollect and Direct-Collect surveys, where the skips and branches can be enforced at the time of collection, but paper surveys can use skips too.

Both skips and branches target pages, not individual questions, so be sure you've set the page breaks you need before you start (see page 50).

**Skips** are forward jumps to a page. They're based on single answer questions, such as Yes/Uncertain/No, where Yes and Uncertain continue in question order, while No and a missing answer might skip ahead to the next topic.

**Branches** work with single or multiple answer questions, sending the respondent one or more pages of questions for each option they select. This works well for product evaluations, where you might have a multiple answer asking which brands they use, and then a page with detailed questions for each one.

When you go to Skip Patterns under the Document menu, the first screen you see shows the status of the current project. From there, click Set Skips or Set Branches to configure individual pages. Be sure to test your settings thoroughly after publishing the questionnaire.



### Pages to skip or branch from

Displays the pages and status of the current questionnaire. Skips & branches are document-specific, so you can have different settings for each questionnaire. However, each page can only have one skip or branch.

### None

Removes the skip or branch from the document.

### Skip/Branch

Brings up the detailed dialog (following) for setting a destination for each response to a question.

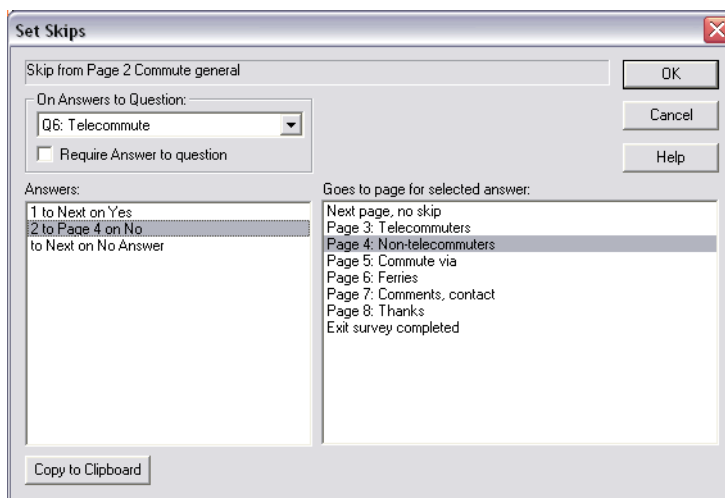
**GoTo** Brings up a simpler dialog for jumping ahead everyone who arrives at a survey page, regardless of what they mark for answers.

**Edit** Modifies an existing Skip, Branch or GoTo definition on the page.

## Set Skips/Branches

To set up a skip or branch:

- Select a question from the list in the upper-left. Valid questions from the current page and all prior pages will be displayed.
- Decide whether or not to require an answer.
- Click on a response in the left list, then click on its target pages on the right (Shift+click to select a range).



## Multiple Questionnaire Documents

SurveyPro's multiple questionnaire documents are designed for projects where you're analyzing data from several related survey versions. Applications include:

- Multiple media
- Longitudinal studies and other ongoing surveys where the questionnaire evolves
- Long and short versions of a survey, or overlapping question sets for different audiences
- Distinct layouts for different clients, brands, etc.

- Postcoding, adding fields to the database for information beyond what the respondent supplies (see page 125)

The main “don’t” for multiple questionnaire documents (and the reason for the warning when you add a document) is to have two independently analyzed surveys in one file. While nothing bad would happen, it unnecessarily increases the file size and complicates analysis, since you would need to sort through the master question list for the questions from a particular document.

## Working with Linked Question Tiles

The whole purpose of multiple questionnaire documents is to have questions in different surveys linked to a common data field. SurveyPro bases these connections on the internal Q number, not the content of the question text or scale, so there are a few special ways to work with the tiles.

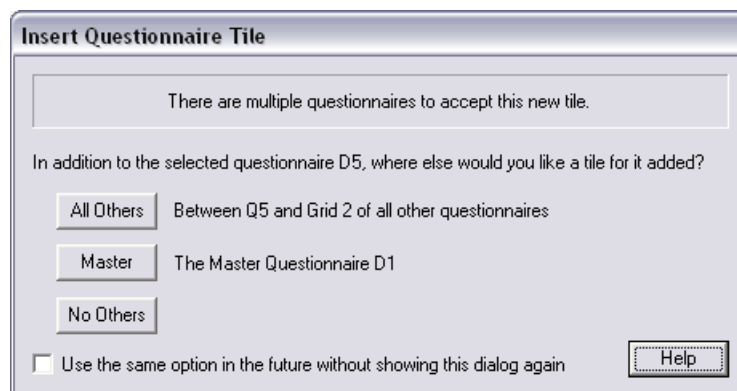
### Question Numbers Q\*

With single questionnaire documents, the internal question numbers simply track the order in the survey. With multiple questionnaires, you tell SurveyPro which document to use to control the question ordering by specifying a Master Questionnaire in the first tab of Tools, Options.

If you do change this setting, make sure it’s either before or after all your data has been collected—otherwise you’ll encounter import mismatches between the new question numbering and older documents’ data sets.

### Inserting new questions

When you add a new question or grid to a document, the setup screens appear as usual—the difference is that when you reach the end, SurveyPro displays a dialog asking how many places you’d like the question inserted:



This is a fast way to insert questions in several documents at once—even if the order of the other documents is different and you need to do some rearranging.

**Moving tiles within a document**

Rearranging linked question tiles is just like working with unlinked tiles. Drag and drop, or cut and paste to the new location.

**Copying and pasting between documents**

If you have a question in one survey document which you also want in another, copy it from the first document, and paste it into the second.

**Breaking the link on a question**

Sometimes you want to use a linked question as a template for a new field, but first you need to break the link so you can freely edit the tile. To do this, copy and paste the tile *within one document*. When the second instance is pasted, it will be with all the same settings, but a new Q number unique to that tile.

**Editing linked questions**

Because the question text, report label and scale are integral to the question definition, an individual tile can only edit layout attributes. When you bring up the editing dialog for a question or grid, you'll be given the following options in the lower-left corner of the first tab:

- Selected questionnaire only, which allows you to edit the text styles, scale layout, and tile dimensions such as width and indentation.
- All documents of the same media, same as above but applies changes to several surveys at once.
- All questionnaires, which allows all settings to be edited.

**Surveys in Multiple Languages**

SurveyPro considers the question text and scale labels part of the field definition, so they have to be identical in all questionnaires.

The technique for working with multiple language versions is to finalize your "master" survey in one language (usually the language you will use for reports). When that's done, save your SP4 project to a new file and translate the questionnaire in the copy.

All data should be entered or imported into the master project file for common analysis. This includes open-ended responses in different languages. You may want to add a question which identifies the language version the respondent used.

**NetCollect and Chinese, Japanese, Arabic, ...**

You can create "double-byte" surveys when working with NetCollect's HTML output. While SurveyPro uses only the ANSI character set's accented letters, you can translate its HTML files after export to double-byte character languages. Data files may be imported for analysis of checkbox, rating and numeric data. Written answers cannot be analyzed in SurveyPro without translation (they appear as a series of random accented characters), but they will export cleanly to comma delimited

ASCII files for analysis in MS Access and other applications which will properly encode the double-byte characters.

## Impacts on the rest of the project

As with everything else in questionnaires, multiple survey documents affect other aspects of your project.

### **Answer Entry**

When you enter the Answer Entry screen you'll be asked which questionnaire you'd like to use for entering new forms. This can be changed mid-session using Edit, New Form Questionnaire.

### **Import**

As with Answer Entry, Import needs to know the document into which you want new records placed. This setting is made on the first screen. (Collect data files remember the document which created them.)

### **Analysis**

By default, analysis is made to the entire database. However, you can set up Form Select Filters (see page 212) to analyze results from one or more questionnaires.

## Passwords

Passwords can be a double-edged sword in surveying. On the positive side, they ensure respondents are qualified, and in some cases, that there is only one submission per respondent. Unfortunately they also reduce the real and perceived anonymity of the project and may increase the administration costs. If a survey is particularly sensitive (such as employee evaluations), the use of unique passwords often requires the buffer of a consultant or third-party hosting service such as Apian Survey-Host.

Passwords are most applicable for NetCollect and DirectCollect surveys. SurveyPro supports two main password modes:

- Single value, with or without case sensitivity
- File of multiple values, allowing either one or many submissions per password

When checking against a file, the most common application of multiple use passwords is to segment the respondent base. Different passwords can be issued to individual departments or customer segments, identifying their group while maintaining individual anonymity.



## Generating password PIN files

Whether you supply a list of values (such as employee IDs, e-mail addresses, or department codes) or have SurveyPro create a set, it needs to be converted to a PIN format. PIN files are specially structured and sorted for fast checks and marking of used values.

Valid passwords are alphanumeric, with some special characters such as “@,” “-,” and “\_” allowed, but no spaces.

SurveyPro generated passwords are 4 or 5-letter alphanumeric values, or longer pure numeric values. One advantage of using the 4 and 5-letter PIN values is that NetCollect and DirectCollect will automatically substitute for several common typing errors, such as “O” for “0.” These PINs are also generated from a large supply, so there is a low probability of randomly typing a valid password.

Whether you are generating a PIN file from scratch or converting your own file, the utility to use is Make PIN File under the Tools menu. Make sure you generate enough passwords for your full respondent population, including some spares for testing.

## Seeding a database with passwords

While the Make PIN File utility generates an external PIN file, there’s another option for generating PINs within a database. The primary application for this tool is mail merges, such as printing paper surveys with a unique barcode, or creating a list of passwords and e-mail addresses for a mass mailing.

Fill Passwords is located under the Database menu when you’re in Answer Entry. When you specify a question that uses one of the Apian PIN scales, it will add a unique password to forms which do not already have one. Before running Fill Passwords, you will need to have entered or imported the forms you would like filled.

Then, to generate an external PIN file for administering your survey, use the Make PIN File utility.

## Specifying a question as a password

For NetCollect and DirectCollect surveys, you can quickly add a password using the Document Properties dialog. On the Welcome tab there’s a checkbox for “Enable Password,” which allows you to select an existing question or add a new one.

Then when you Publish the document, you specify the type of password check (single, multiple, unique) you'd like to use.

## Screening and cleaning

Data cleaning tools exist both in the Import dialog and in the Data Cleaning dialog under the Answer Entry Tools menu. If the survey was published with password settings, they will be pre-set in the cleaning dialog. Or, if no password has been set (or you need to change it), you can do so at this time.

Paper survey password screens are performed both at import and in the Data Cleaning dialog.

## Make PIN File Dialog

As passwords are most frequently used in Web surveys, configuring logins and creating PIN password files are covered in the *NetCollect User Guide* and Help system.

## Alternative access restrictions

Depending on your project's media, respondent base, etc., you may find an alternative access restriction method more effective than a SurveyPro password.

### **LAN or Web security**

Use your existing server security to restrict access to NetCollect or DirectCollect projects. This can work particularly well on Intranets where extensive user-based security is already in place.

### **Must Answer Pattern Scale**

Add a question to the survey which uses a pattern scale, such as a the one used by your customer IDs, and set it as a Must Answer question. This is similar to checking against a password file, but can be used when you don't have access to the values.

### **Cookies (Web only)**

This is the loosest way to restrict access, and should only be used in narrow circumstances. Cookies place a small file on the server which says something like "respondent completed survey." This is a browser-specific setting, so if a computer is shared it will block additional respondents. At the same time, cookies can also be refused or deleted by the respondent, so in spite of the block they may return many times.

## Publishing Questionnaires

Publish is the point at which a document leaves SurveyPro's design environment and becomes accessible to a wider audience. Settings in the Document menu's Publish dialogs are highly medium-specific to accommodate features as diverse as Web server script locations and interviewer start-up screens.

### **Text to Clipboard/File**

Send the contents of the entire questionnaire to the clipboard or a text document for use in another application. This does not include any of the formatting, so if you're interested in a mechanism for electronically distributing copies of a paper survey we recommend using the Adobe Acrobat PDF format.

### **DirectCollect Template**

Creates the survey template file which will be used with the DirectCollect run-time application. Some of the settings made at this point are the distribution method (e-mail, kiosk, telephone interviewer), and answer tests with your custom error messages. See the *DirectCollect User Guide* for details.

### **KeyCollect Template**

KeyCollect Publish is the simplest because it's creating a mirror of the SurveyPro Answer Entry screen—all you do is specify a filename. See the next section.

### **NetCollect File Set**

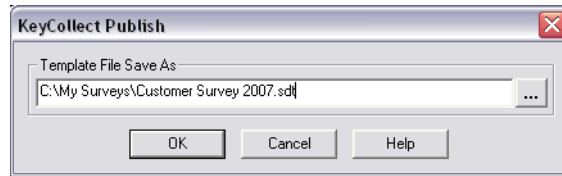
Generates a set of HTML files for the questionnaire, as well as the configuration file used to drive the scripts. See the *NetCollect User Guide* for details, including a tutorial.

## KeyCollect Publish Dialog

This dialog specifies the location of the SDT (survey data template) which will be used by the KeyCollect user to create a SDE (survey data entry) file.

The template contains information for all questionnaire versions, including the question structures, skips, and other enforcements you may have configured.

Note: After you publish, your questionnaires will be "locked" to prevent changes which would create import problems. Use the Edit Menu, Lock Changes item to unlock.



## Publish Logs

Publish logs are most useful for NetCollect surveys, where they specify the filenames, paths, and other settings on your server. See the *NetCollect User Guide*.

In other cases, the logs are a useful reference for when a document was last published and to which format.

Publish logs are accessed through the **Tools** menu, **File History** dialog.

# Chapter 7

## Creating a Questionnaire

This first lesson walks you through the core questionnaire design features in the creation of a one-page survey.

In this tutorial you'll learn how to:

- Set up a title and footer in Document Properties
- Place a logo on the page
- Add questions
- Insert a basic question grid
- Create scales
- Add text comments, headings, etc.
- Format text

In addition to this tutorial, there's a lesson about building more complex question grids on page 102. The NetCollect and DirectCollect guides also cover questionnaire features for the Web and screen, but assume you're familiar with the fundamentals of questions and scales covered in this lesson.

### Tutorial Notes

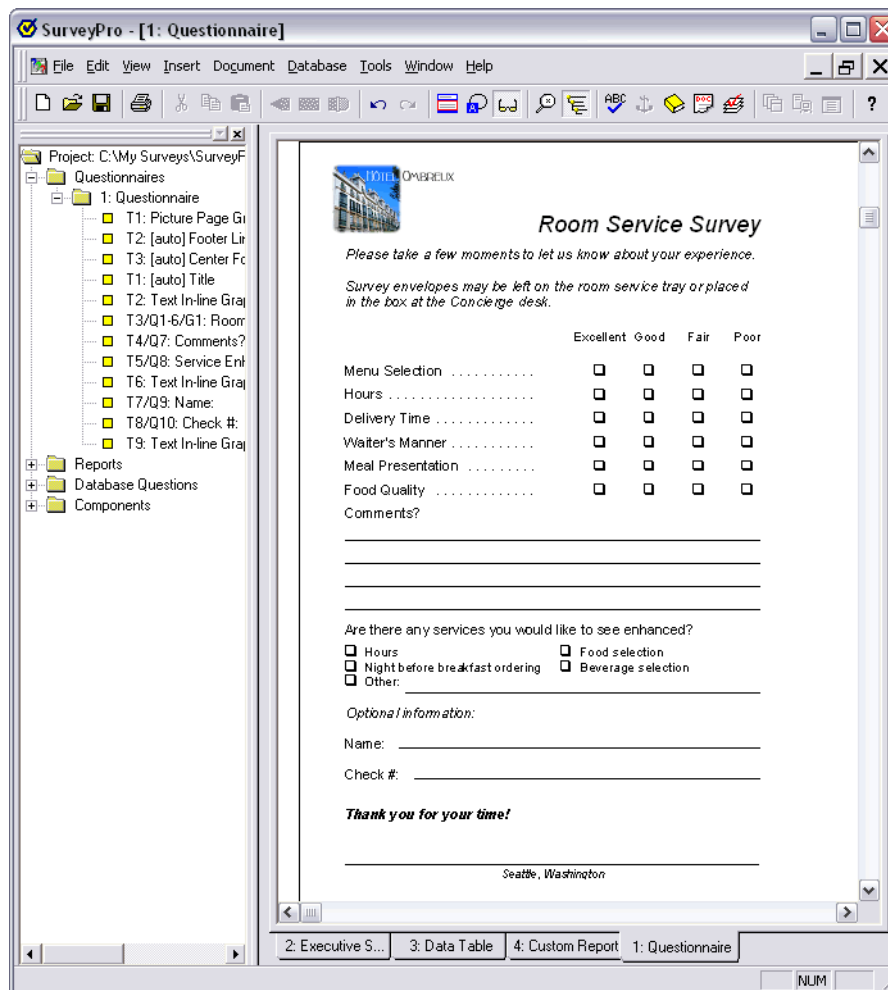
**General** You can save your file and take a break any time you're in the main document screen.

**Tutorial Files** Are in your **SurveyPro Samples** folder, by default under:  
C:\Program Files\Apian Software\SurveyPro 40\

Hotel Ombreux, an older hotel which currently serves tourists, is attempting to upgrade its image, facilities, and services to attract business and luxury travelers. Based on past comments, they know that room service has problems, so they're beginning their surveying with that department.

Note, while this tutorial works with a paper form, what you learn will translate to your Web and screen based surveys.

When you have completed the lesson, your survey should look like this example.




1. Start SurveyPro, log in, and if the window isn't filling the screen, maximize it.
2. Save your file as **YourName Questionnaire Tutorial.SP4**.

The screen should be showing an empty new questionnaire, with additional tabs at the bottom for the Executive Summary, Data Table and Custom reports. At the left you may see a tree containing all the information about the current project, so right now it's empty except for the pre-loaded scales and text styles under Components.

## Editing Document Properties

Let's quickly add a title and footer through the Document Properties dialog:


1. Click the Document Properties toolbar button  or go to the **Document** menu, **Properties**.
2. Let's change the name from "Questionnaire" to something more descriptive—in the first field on the General tab, type Room Service Survey.

We want this to be a small form, so we're going to convince a letter size piece of paper it's smaller. When it goes to the printer, they will trim it down to size, 8.5" x 5.5"

3. Change the **page setup** dimensions to:
  - Top 0.75
  - Left 0.5
  - Right 3.5
  - Bottom 3.5
4. At the top of the dialog, click the **Title** tab and turn on **Place Title on Page 1**.

There's nothing on this tab which cannot be done manually with in-line graphics tiles, but Document Properties is usually the fastest approach. Titles created in this manner must be edited in the Document Properties dialog, unless you click the "Convert" option at the bottom which will allow free-form editing.

5. Type the title Room Service Survey and for **Place Title To** select **Right**.
6. Click the **Footer** tab, and change it to **Select from Standards**. Take a quick look through the options which are pre-loaded (all three lists are identical).
7. For this project a different footer makes more sense, so change the setting to **Custom**.

The type-in boxes may include text with some words formatted in a ~~strike-through~~. This indicates a variable, which is inserted using the Text Palette floating on top of the Document Properties dialog. Just place your insertion point where you want the variable, click the button  to drop down a list of numbering and other options, and select the variable you want.

Because this is a single page survey, we actually want some simple, static text in the footer.



8. Clear any existing text, and type in the **Centered** section:  
Seattle, Washington

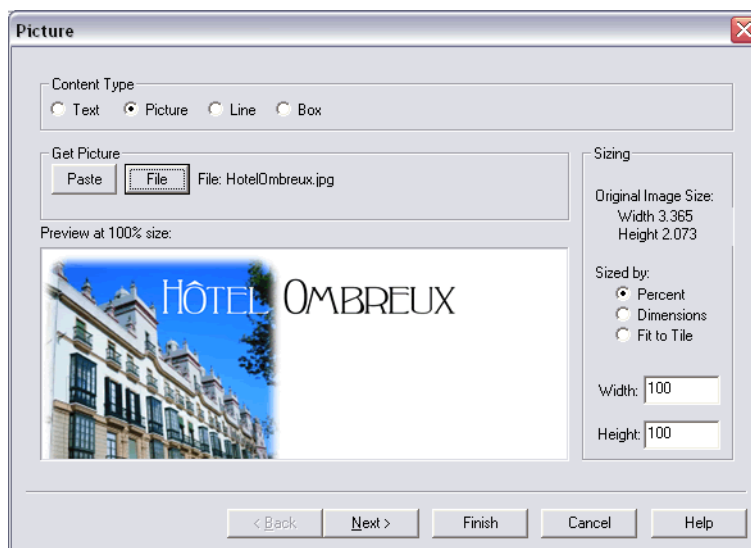
- In the lower-left, change the **Footer distance above page bottom** to 3. Click **OK**.

Note that SurveyPro will update the left/center/right alignments if you later change the page margins.

## Adding page graphics

Now let's add a logo to the top of the page.

- Click on the **Page Tile** mode  in the toolbar.
- Click the **Insert** button , select **Page Text/Graphic**.
- At the top of the dialog, change the tile type to **Picture**.
- Click the **File** button for the source, and from the SurveyPro Samples folder select **HotelOmbreux.JPG**.

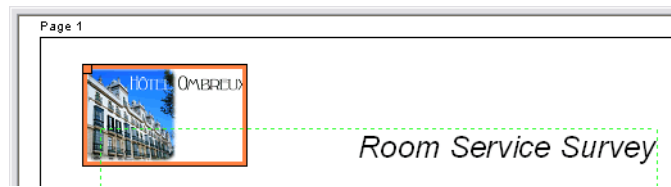


The logo is a little large, so let's scale it down a little.

- In the lower-right corner, change both scaling dimensions from 100 to 40. The setting just above, on percent by default, can be used to change the scaling method.
- The next tab is dimension settings for the tile, which we don't really need here, so click **Finish**.
- The Hotel Ombreux logo should be in the center of the screen with an orange outline (if it isn't outlined, click to select it). Move your mouse over the small box in the upper-left corner until it turns into a hand.





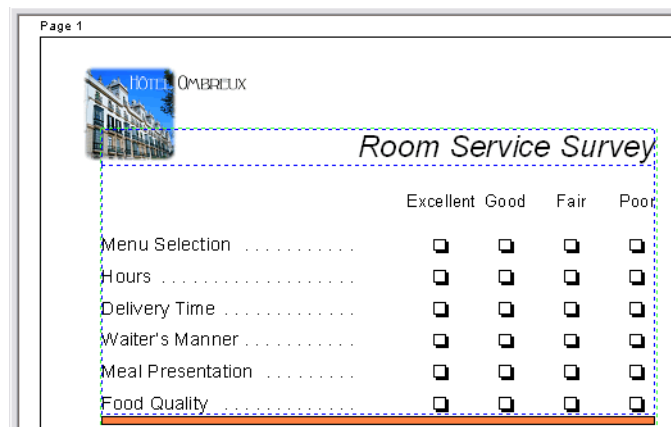
- Click and drag until the logo is in the upper-left corner of the page, similar to the image below:



We could have placed the logo in the Document Properties dialog like we did the title, or as an inline graphic, but it wouldn't have let us place the image outside the margins.


### Inserting a rating grid

- Click on the **Inline Tile** mode  so we can add questions.
- Insert  a **Grid of Questions**.
- In the first tab, give it the **Report Label** Room Service Ratings.
- Change the layout style to **Alternating tinted bands** and Click **Next**.
- Click at the top of the dialog, in the white box next to Row 1. Type the following questions with **Enter** after each item:  
 Menu Selection  
 Hours  
 Delivery Time  
 Waiter's Manner  
 Meal Presentation  
 Food Quality
- Just below, in the Scale drop-down list, select **S9: Excellence -- 4 levels**. Click **Finish**.



That was relatively painless, wasn't it? Of course there's a great deal more to grids, which is why *Building Complex Question Grids* on page 102 delves into all their details.

## Adding a comment question

1. Click Insert  again, this time for a **Question**.
2. The big box at the top is for the question text, in this case just type Comments?

Note that as you typed, the Label for Report Figures below the question text followed along. SurveyPro copies the first 200 characters of your question text (which can be up to 2,000 characters) into this field for use in the object tree, drop-down lists, and figures. In general, shorter labels are much more useful.



3. Click **Next**.
4. As with the grid, we're going to select a scale—choose **3: Non-repeating or Long Memo Written Answer** from the list in the upper-left.

While it may be confusing when you start out, when you get to analysis you'll be glad SurveyPro doesn't treat all written answers alike. For details on scale applications, see *Selecting Scales* on page 69. When you selected the scale, a brief explanation also appeared below the scale. Your layout settings also appeared, and we'll set those now:

5. On the right hand side, change the **Entry Lines** to 4. Click **Finish**.

## Creating a custom answer scale

So far, we've only selected scales which were pre-loaded in SurveyPro. However, often you'll need something unique.

1. Insert  another question, giving it the text:  
Are there any services you would like to see enhanced?  
and **Report label** Service Enhancements.
2. Click **Next**.
3. SurveyPro has remembered your scale setting from the previous question, but in this case we need a new scale. In the upper-left, above the Non-repeating or Long Memo scale showing in the list, click the Insert button .

The dialog picked up your question's report label as a name, so we can leave that as-is. Next to the name, at the upper-right, are the six types of custom scales SurveyPro creates (see page 72). This setting drives the controls for the remainder of the dialog, so it should be the first item set in

creating a new scale. New scales always default to Checkbox as that's the most common custom scale.

4. On the left hand side, change the **Answers** setting from Single to **Multiple**.
5. Turn on **Add Other Blank** just below, which will add both a checkbox labeled Other (or your override from Document Properties) and a text field to collect the responses.
6. On the right hand side, click in the white box next to row 1, just like we did with grids.
7. Type the following labels, with Enter after each one:  
Hours  
Food selection  
Night before breakfast ordering  
Beverage selection


As you typed in the grid, the text was mirrored in the larger box below. This box is convenient when you have long labels (text can be up to 200 characters), and is also used for overriding the formatting with bold, italic, etc.

It would probably make more sense to have the second and fourth items next to each other, so let's rearrange them:


8. Click once on the gray number 3 next to the breakfast item to select it.
9. Click on the number 3 again, but hold and drag the item upward until you see a red line between items 1 and 2, then release.
10. Click **OK**, and click **Finish** to close the Question dialog.

When you have responses in your database, it's critical that you rearrange scale items in this manner so SurveyPro can track which data goes with which item. If instead we had manually swapped label text for the items, or added a new item where we wanted to move the breakfast question and deleted the old one, data would have been lost. Of course this project has no data yet, so maintaining its integrity isn't an issue, but it's good to get into the habit. The same principles apply to rearranging question tiles (see page 39).

## Adding instructions and editing Text Styles



1. Click Insert , this time for an **Inline Text/Graphic**.
2. Type Optional information: in the text box.

The current Text Style is too close to questions and scales, but changing it to italic would set it apart. We could override the formatting using the Text Palette which appeared when you started typing, but there are going to be two other text graphics in this survey so we might as well change the Text Style.

3. In the lower-right corner, next to the **Text Style** drop-down list, click Modify .
4. Reduce the **Height** to 11 points, and turn on **Italic**. The preview box should reflect the changes.
5. Click **OK**, and click **OK** again to close the graphic dialog.

## Asking a name



Just two more quick questions and a little copy/paste to go!



1. Insert  a **Question** with text Name :
2. Click **Next**, and again select scale **3, Non-repeating Written** (although responses will be short, we won't be tabulating them).
3. On the right-hand side, change the **Place Scale** setting **To right of question**.
4. Click **Finish**.
5. Insert  a second **Question** with text Check #:
6. Click **Next**, then **Finish**.

While the hotel is planning on using different paper colors to identify feedback for the different meals, if the customer provides the check # they will be able to pull in details about that order's staff, selection, and time—as well as the customer's other orders and feedback. *Importing Data* on page 172 uses this scenario to demonstrate an import merge.

## Copying and pasting tiles

Now let's quickly add a few more headings by copying the one we already created.

1. Click once on the "Optional information:" text graphic in your survey to select it.
2. Copy the tile, either through the toolbar button , keyboard shortcut **Ctrl+c**, or right-click menu.
3. Click on the blue bar at the end of the survey and paste using the toolbar , **Ctrl+v**, or right-click menu.

4. Click on the grid (with the blue shading), and paste  again.
  5. Double-click on the copy you placed above the grid to open its editing dialog.
  6. Highlight the text, and change it to:  
Please take a few moments to let us know about your experience.
- Survey envelopes may be left on the room service tray or placed in the box at the Concierge desk.
7. Click **OK**.
  8. Double-click on the copy of the text graphic you placed at the end of the survey.
  9. Highlight the text, and change it text to  
Thank you for your time!
  10. And let's add a little emphasis, so highlight the text you just typed and click the **Bold** button  in the Text Palette floating to the side of the main dialog.
  11. Click the **Tile** tab at the top of the dialog.
  12. In the upper-right corner, change **Gap at Top** to 0.25 to separate it a little more from the previous question. Click **OK**.

You can also adjust the gap by dragging the bottom of a tile down (see page 39), but if you're adjusting the space for multiple tiles this gives you a bit more precision.

Well, that was it! Your survey should look like the one on page 92, and if it doesn't you may want to open the sample file **Questionnaire Tutorial End.SP4** to compare your file.

From here, you could continue with *Building Complex Question Grids* on page 102, or skip ahead to *Working in Answer Entry* on page 132 to start working with the database.





## Building Complex Question Grids

Question grids are sets of related questions which are analyzed together. *Creating a Questionnaire* on page 91 inserted a basic grid, but this lesson plays with the more advanced settings.

In this tutorial you'll learn how to:

- Use the one-screen setup dialog
- Customize layouts and headings using the advanced dialog settings
- Create a table of write-in boxes


### Tutorial Notes

<b>General</b>	You can save your file and take a break any time you're in the main document screen.
<b>Tutorial Files</b>	Are in your <b>SurveyPro Samples</b> folder, by default under: C:\Program Files\Apian Software\SurveyPro 40\

Note: While this lesson is designed for a paper form, the concepts are fully applicable to NetCollect and DirectCollect surveys. For screen-based surveys you will often need to use more compact layouts than paper, though.

1. Start SurveyPro, log in, and if the window isn't filling the screen, maximize it.
2. Save your file as **YourName Grid Tutorial.SP4**.

### Inserting a rating grid

1. Insert , **Grid of Questions**.
2. In the **Label** field, type Evaluations, and click Next.
3. At the top of the dialog, click in the white box for the first **Question Row Label**.



4. Type the following questions with **Enter** after each item:  
 Knowledge  
 Courtesy  
 Efficiency  
 Wait time  
 Clarity of instructions  
 Availability of forms
5. For the scale, select **S9: Excellence -- 4 levels**, and click **Finish**.

	Excellent	Good	Fair	Poor
Knowledge .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Courtesy .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Efficiency .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wait time .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clarity of instructions .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Availability of forms .....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Though this grid needs a little tuning, you can see how fast inserting a basic grid can be. Even if you plan on using the advanced features to modify a grid, it's usually fastest to rough it in using the two-screen Quick Set.

### Adding a second rating column

Assuming your grid looks like this one here, let's proceed:

1. Double-click on the grid, and click **Add Column 2** in the lower-right corner.
2. Select **S18: Importance -- 4 levels**.
3. Add a **Label** for the second column  
 Importance to you  
 and a **Label** for the first column  
 Our performance today.
4. Click **OK**.



Well the grid just got more detailed, but it lost some clarity along the way.

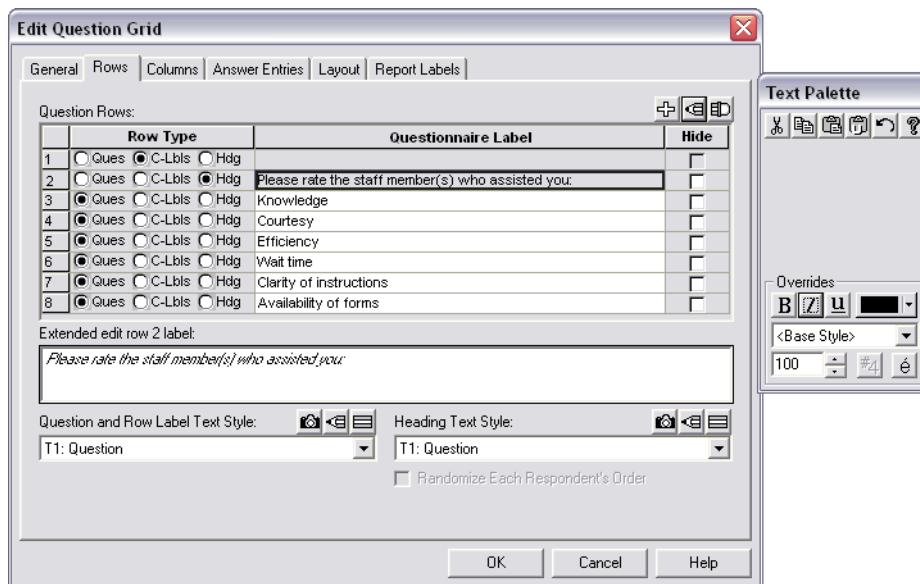
### Using Advanced tabs to add headings



1. Double-click on the grid again.
2. This time, click the **General** tab at the top of the dialog.
3. Change the upper-left setting to **Advanced option screens** and notice a lot more tabs just appeared.

4. Change the **Style** to **Alternating tinted bands**.
5. Click the **Rows** tab at the top and notice that the questions we typed are all present.

Unfortunately the rows are somewhat mixed, so a couple subheads will clarify the questions for respondents.

6. Click on Row 2, Knowledge (row 1 is the column labels or "C-Lbls" for the scale), and click the Insert button  at the upper-right.
7. Change the radio button setting for this new row 2 to **Hdg** for an unscaled heading.
8. Type as the label:  
Please rate the staff member(s) who assisted you:  
and note that as you type in the row, the text is mirrored in the larger editing box below.
9. In the larger editing box, highlight all the text you just typed.
10. Click the **Italic** button  in the Text Palette.



11. Now for the second heading, click on row 6, Wait time
12. Click the insert button  at the upper-right.
13. Change the new row 6 to a **Hdg**, and type:  
And please rate this branch:
14. Again, highlight the text and click italic  in the Text Palette.

## Streamlining the scale columns

Another problem with the original layout was the clutter of all the scale and column labels, so the next step is changing their format.

1. Click the **Columns** tab at the top.

As in the Rows tab, you have a set of columns for the grid: one containing Row labels (questions), and two scale columns. The column labels are probably fine if we simplify the scales.

2. Click on the scale for row 2: Excellence -- 4 levels.
3. In the new area that appeared at the lower left, select scale **12: 1 Low to 5 High Rating**.
4. Repeat for the Importance column's scale.
5. Click **OK** to see the revised version.

	Our performance today		Importance to you	
	Low	High	Low	High
<i>Please rate the staff member(s) who assisted you:</i>				
Knowledge	1	2 3 4 5	1	2 3 4 5
Courtesy	1	2 3 4 5	1	2 3 4 5
Efficiency	1	2 3 4 5	1	2 3 4 5
<i>And please rate this branch:</i>				
Wait time	1	2 3 4 5	1	2 3 4 5
Clarity of instructions	1	2 3 4 5	1	2 3 4 5
Availability of forms	1	2 3 4 5	1	2 3 4 5

That's a little too tight, so let's play a little more with the scale layouts.

6. Double-click on the grid again, and click on the **Answer Entries** tab.

The settings in this tab are driven by the column selection at the upper left, since each scale column could potentially have a different layout.


7. Select **Sc: Our performance today** from the column list at the upper-left.
8. On the right-hand side, change the **Label Style** to **Vertical Labels Above**.
9. Select the second column, **Sc: Importance to you**.
10. Change its **Label Style** to **45-degree labels Above**.
11. Click **OK**.

	Our performance today					Importance to you				
	Low				High	Low				High
<i>Please rate the staff member(s) who assisted you:</i>										
Knowledge	1	2	3	4	5	1	2	3	4	5
Courtesy	1	2	3	4	5	1	2	3	4	5
Efficiency	1	2	3	4	5	1	2	3	4	5
<i>And please rate this branch:</i>										
Wait time	1	2	3	4	5	1	2	3	4	5
Clarity of instructions	1	2	3	4	5	1	2	3	4	5
Availability of forms	1	2	3	4	5	1	2	3	4	5

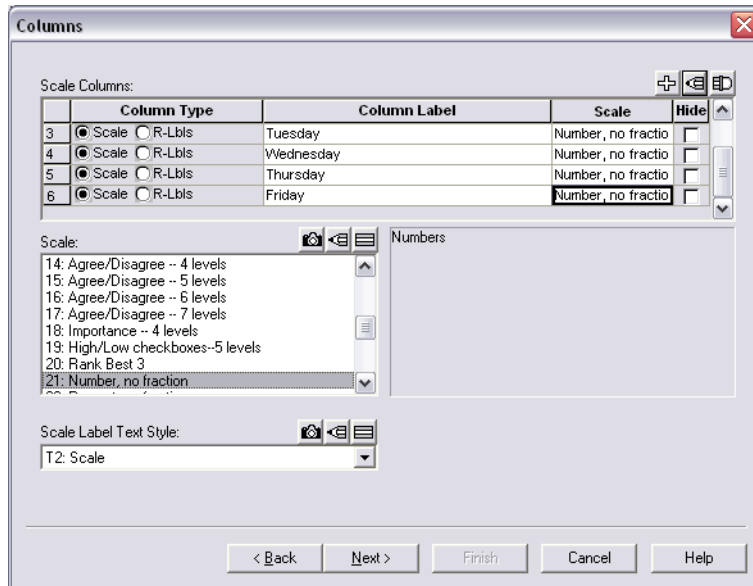
It's not a combination you're likely to use for a real survey, but this gives you a look at another feature for this style of grid. Both these styles appear for paper documents, but will be missing from the dialogs for Web surveys since HTML doesn't support rotated text.

### Creating a grid of number entries

The other type of grid is sometimes referred to as a table, and consists of write-in fields for numbers, text, dates and other scales.

1. Insert  a new Grid.
2. Switch the dialog mode to **Advanced options screens**—you won't see the tabs change because it's in wizard mode.
3. Name the grid Employee time breakdowns. Click **Next**.
4. At the top of the Rows screen, click in the white box for row 2, the first question.
5. Type the following questions with Enter after each item:  
 Billable hours  
 General correspondence  
 Meetings  
 Web surfing  
 Filling out forms  
 Other (please specify below)
6. Click **Next**.
7. We want a column for every work day, so type labels for Monday through Friday.

8. Click in the cell next to Monday which currently says "<select a scale>." From the scale list that appears in the lower-left, select 21: Number, no fraction.
9. Repeat for the other four rows.




10. Click **Next**.
11. We actually do want a write-in box for each of these (it's why we left the grid style so plain), so click **Finish**.

	Monday	Tuesday	Wednesday	Thursday	Friday
Billable hours .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
General correspondence ...	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Meetings .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Web surfing .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Filling out forms .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other (please specify below)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Setting column widths

The grid is sizing the entry blanks based on the column labels, which are different lengths, so let's make that more consistent. However, if we make them all as wide as Wednesday, the grid won't fit on the page so let's adjust the label size as well.

1. Double-click on the grid to reopen the editing dialog.
2. Click on the **Columns** tab.

3. In the lower-left, where it says **Column Label Text Style**, click the Insert button  next to its drop-down list.
4. Give the style the **Name** Scale size 9.
5. Reduce the **Height** point size to 9 and click **OK**.
6. Now on to the entry blank, so click on the **Layout** tab.

On the right-hand side is a list of all the columns with an “auto” next to them for their width.


7. Leaving the first item Row Lbls on “auto,” change the settings for Monday through Friday to 0.75.
8. At the top of the dialog, change the **Border Space Width** to 0.05 and click **OK**.

	Monday	Tuesday	Wednesday	Thursday	Friday
Billable hours .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
General correspondence .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Meetings .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Web surfing .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Filling out forms .....	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other (please specify below) ..	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

On a Web survey, you can set the grid to a forced sum for each column. The option appears on the Answer Entries tab.

### Adding a blank for Other responses

The layout is much improved, but since the grid requests the respondents specify their Other response, we need to add one before we’re done:

1. Click the grid below the table we just finished, and Insert  a new **Question**.
2. Leave the question text blank, but give it the report label  
Time breakdown Other text
3. Click **Next**.
4. For the **Scale**, choose **2: Short Countable Written -- Multiple answers**.
5. Set the **Entry Style** on the right side to **Write-in box**.
6. Click **Next** twice to get to the Dimensions screen.

7. Make three adjustments:
- Question Text: Down from Top = 0**
  - Scale Entry: Entry Width = 2**
  - Scale Entry: Below Question = 0.1**

The screenshot shows the 'Dimensions' dialog box with the following settings:

- Title:** Width: auto
- Question Text:**
  - Left Indent: auto
  - Right Indent: auto
  - First Line Indent:  Aligned,  Indent,  Hanging
  - Down from Top: 0
- Scale Entry:**
  - Left Indent: auto
  - Entry Width: 2
  - Below Question: 0.1

Buttons at the bottom: < Back, Next >, Finish, Cancel, Help.

8. Click **Finish** to see the entry blank below the Other rating item.

Those are the essentials of creating complex grids. For the remaining controls which were not covered here, simply press the Help button when you're in the grid dialog.

In the SurveyPro Samples folder you'll find a file called **Grid Tutorial End.SP4** with the finished tiles.

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## Working with the Database

Working with SurveyPro's database may involve:

- Entering forms directly into the program
- Importing data from a Collect add-on or another source
- Deleting individual or selected forms
- Replacing responses in a question for selected forms
- Correcting formatting
- Screening for passwords
- Removing duplicate records
- Printing surveys with data filled in (mail merge)
- Exporting data for use in another application

With the exception of import and export, all these functions are performed in SurveyPro's Answer Entry mode. When you launch SurveyPro, you're in the main or document editing mode, an environment that is optimized for creating questionnaires and reports. Answer Entry is optimized for adding new forms, searching for forms based on a variety of criteria, and changing responses.

The Answer Entry screen is broken down into two main sections: the questionnaire and the data entry controls. Each survey entered or imported is represented as a filled in questionnaire in the database—just as it appears in the design screen. On the left hand side, there are a type-in box where you enter responses, and a reference list of acceptable answers or existing data (depending on the question type).

## Database Fundamentals

If you're new to databases, here are some concepts and terms which will help you understand SurveyPro.

**Form = Record =  
Respondent**

In your SurveyPro file, each respondent (unless they've answered several times) is represented by one form in the database. That respondent's form includes all the information they've submitted.

**Field = Question**

When you're designing your survey, each question you add creates a field in the database. This field definition includes information on the values it can accept, such as numeric, date, written, or multiple answer checkbox.

In some cases, a single question tile will actually add several fields, such as with grids, or checkbox scales with Other blanks.

#### **Database vs. Data File**

These two terms crop up when you get into import and export, and unfortunately the lines are somewhat blurry. In that context, a data file (such as delimited ASCII) consists of the respondents' answers. A database will include the respondents' answers as well as definitions of the fields (numeric, text, etc.).

#### **Form ID**

Each form in your SurveyPro database includes a Form ID such as 9c46-03cm-1fc. This ID is created when each response is completed when using NetCollect, DirectCollect, KeyCollect, or SurveyPro's data entry screen. If you are importing files from another source, the ID will be generated on import. The IDs are designed to be unique, combining the date and time of the submission with other variables for almost no chance of duplication.

## Answer Entry Screen

Go to Answer Entry from the Database menu or toolbar  to:

- Add new forms (see page 121)
- Navigate to forms based on form number, an answer, or a filter
- Edit or delete forms individually or in batches (see page 123)
- Print forms with data for a mail merge or to view individual responses (see page 118)

About the only data manipulations you can't do in Answer Entry are import/export (see page 141) or change field structures (scale definition).

The Answer Entry screen includes several elements:

#### **Menus**

Specialized for database management. See page 113.

#### **Data Entry Panel**

The left-hand panel contains a type-in box for entering responses, and the Answer List which contains answer options for pre-set scales, or previous responses for written answers.

#### **Questionnaire Image**

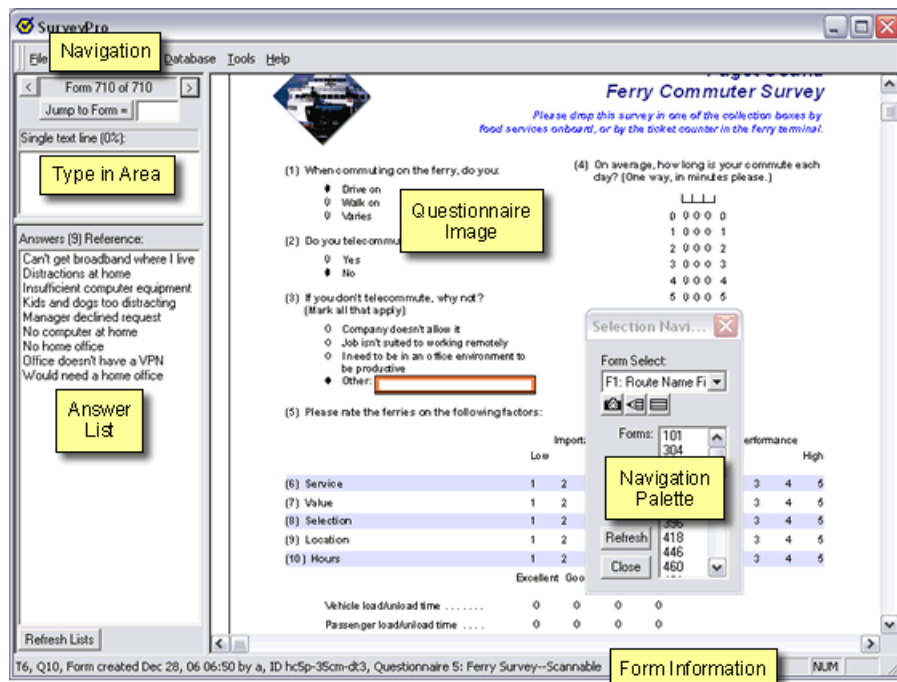
The main area of the screen is an image of the questionnaire, with the current question highlighted in orange.

#### **Navigation Palettes**

When navigating the database, you can opt to find questions matching certain criteria, and SurveyPro will pop up one of these palettes for quick jumps. See *Data Cleaning* on page 123.

**Form Information**

In addition to the questions you create, each form has several other attributes such as the source and internal unique ID.



**Note:** When you first go to Answer Entry, you may be prompted by these dialog boxes:

**Automatic Save**

To properly protect your data, SurveyPro needs to be able to save frequently to the file. If you're just experimenting, click No and then Save As to a new filename before going into Answer Entry.

**Questionnaire for New Forms**

If your project contains multiple questionnaire versions, such as paper and HTML, you'll be asked which one to use for entry. You can change this at any time via the Edit menu, and can scroll through forms using other questionnaire versions.

**Answer Entry Menus**

SurveyPro uses two slightly different sets of menus depending on whether you're entering/editing forms or working with documents. See also *Document Editing Menus* on page 16.

## File Menu

Common Windows file functions, such as print, save, and most recent files.

<b>Save</b>	Ctrl+S	Saves the current file.
<b>Print with Data</b>	Ctrl+P	Allows you to print the forms filled in with all or some of the data. This is useful for “mail merges” of address information or ID barcodes, or for looking at individual responses in the context of the survey. See page 118.
<b>Print Setup</b>		Windows dialog for selecting your printer and setting options. This is also where you set the paper page size.
<b>Quit Answer Entry</b>	Ctrl+F4	Returns you to the document editing screens.
<b>Exit SurveyPro</b>	Alt+F4	Closes the current file (prompting to save changes), and exits SurveyPro.

## Edit Menu

Cut, copy, paste, and other functions.

<b>Cut</b>	Ctrl+X	Standard Windows functions for cutting, copying, pasting, or deleting the selected text. This can be used to copy and paste text between SurveyPro and other applications, as well as within or between SurveyPro projects.
<b>Copy</b>	Ctrl+C	
<b>Paste</b>	Ctrl+V	
<b>Delete</b>	Del	
<b>Clear Answer</b>	Ctrl+ Del	Clears the current answer.
<b>Copy Last Form's Answer</b>	F7	Copies either the answer from the same question in the previous form, or the entire contents of the last form—in either case, overwriting the current answers. If you are doing this frequently to copy session or batched answers, you can also use the View menu's Preload Answers to add answers in each new form.
<b>Copy Last Form</b>	Ctrl+F7	
<b>Protect Answers</b>		Prevents accidental changes to forms in the database. See page 118.
<b>New Form Questionnaire</b>		In a multiple questionnaire project, changes the document used for adding forms to the database. See page 131.



## View Menu

Preferences for which screen elements to display and how.

<b>Zoom</b>	Adjusts the display size of the document.
<b>Preload Answers</b>	Preloads some of the answers in new forms for batch entry of responses. When you switch to the Preload mode the screen looks normal except that the form number will say "PRELOAD." Enter whichever answers you want to preset (during entry answers can be changed for exceptions). Select the Forms, Preload menu item again to switch back to normal entry. See also the Edit menu's Copy Last Form's Answer and Copy Last Form.

## Form Menu

Navigate among forms.

<b>Next Form</b>	F10		Step forward and back through the forms. When you reach the last form, F10 will add a new one.
<b>Last Form</b>	F9		
<b>Find Form Select Find Same Answers Find Duplicates</b>			A set of tools for navigating and cleaning the forms and the database. Each one pops up a small palette which lists forms matching a Form Select, the response of the current question, or is a duplicate. Within the palettes, click on a form number to jump to that record, or Refresh to update the list when you make changes to your criteria or the data. See also <i>Data Cleaning</i> on page 123.
<b>Delete Form</b>	Ctrl+ F11		With Delete, the form is completely removed, which renumbers the forms after it in the database. Void leaves a placeholder to maintain form numbering, but also eliminates the form's data. See also <i>Mass Delete</i> on page 128.
<b>Void Form</b>	Ctrl+ F12		

## Database Menu

Functions for changing many forms at once.

<b>Mass Delete</b>	Deletes forms matching a Form Select, within a range of form numbers, or for the entire database. See page 128.
<b>Mass Replace</b>	Replaces the response to a question based on a Form Select, within a range of form numbers, or for the entire database. See page 129.
<b>Answer Replace</b>	Replaces one particular answer to a question with another—a quick way to consistently code short written answers. See page 130.
<b>Fill Passwords</b>	Seeds forms in the database with a password value, for use with mail merges or other notifications. See page 119.

## Tools Menu

Utilities and preferences.

<b>Spell Check</b>	F7	Checks spelling for responses in the current question, form or the entire database. See page 23.
<b>Spelling Options</b>		Allows you to control what the spell checker should ignore, edit your custom dictionary, and activate the legal and medical supplements.
<b>Refresh Answer Lists</b>		Forces an update of the Answer list in the left panel. To speed performance, SurveyPro updates this list with new entries instantly, but only removes deletions on Refresh or Save.
<b>Data Cleaning</b>		Similar to the import cleaning screen, this allows you to clean the contents of your database, checking for required fields and pattern matches. See page 126.
<b>File History</b>		Displays the current status of your file as well as publish, import, and export activity through its history. See page 25.
<b>Make PIN File</b>		Creates a SurveyPro compatible PIN file for password or field checking. Could be generated by SurveyPro or a conversion of an ASCII file. See page 88.
<b>Options</b>		Preferences for both the current file and for your system. See page 26.

## Data Collection Options

There's now a wide (and sometimes dizzying) array of data collection options for surveying. What are the best choices given the respondent base, survey content, time frame and budget?

A basic run-down of your alternatives is:

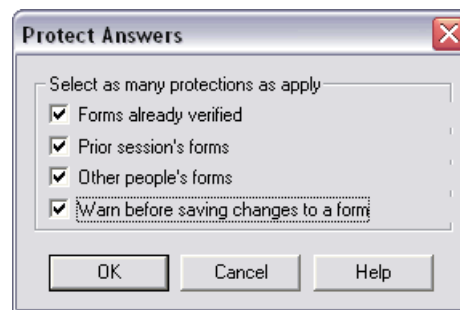
<b>Collection Technique</b>	<b>Requires</b>
Keyed data entry	SurveyPro, or KeyCollect for more economical multi-user entry (see page 10)
Web or Intranet	NetCollect document (see page 9)
E-mail, phone, disk, kiosk, LAN	DirectCollect document (see page 9)
Scanning	Third-party scanning software compatible with SurveyPro's forms
Enterprise databases or other sources	SurveyPro

Note that a single project can be administered via a scanned paper form, the Web, a kiosk, and any other combination you need. The advantage of the Collect programs is their tight integration with SurveyPro, which allows you to use sophisticated functions for Web surveys without coding, and streamlines data import. However, SurveyPro's import filters (see page 144) can handle just about any file type, so you can use many third-party data collection tools for specialized applications.

## Protect Answers

*Accessed from the Edit menu in Answer Entry.*

Use this dialog to protect responses from accidental change. If you're interested in restricting access to editing, use the administrative passwords in the Options dialog (see page 26).



### **Forms already verified**

Verification is a KeyCollect option where two different clerks enter forms to confirm accuracy, so this may not apply to your project.

### **Prior sessions' forms**

Sessions start with the launching of SurveyPro, and end when you exit.

### **Other people's forms**

SurveyPro prompts you for an ID when you launch a Workgroup license or go to Answer Entry for a Personal License. This ID is embedded in forms which are entered directly into SurveyPro or with KeyCollect.

### **Warn before saving changes**

Pops up a confirmation warning when you leave a form which has been changed.

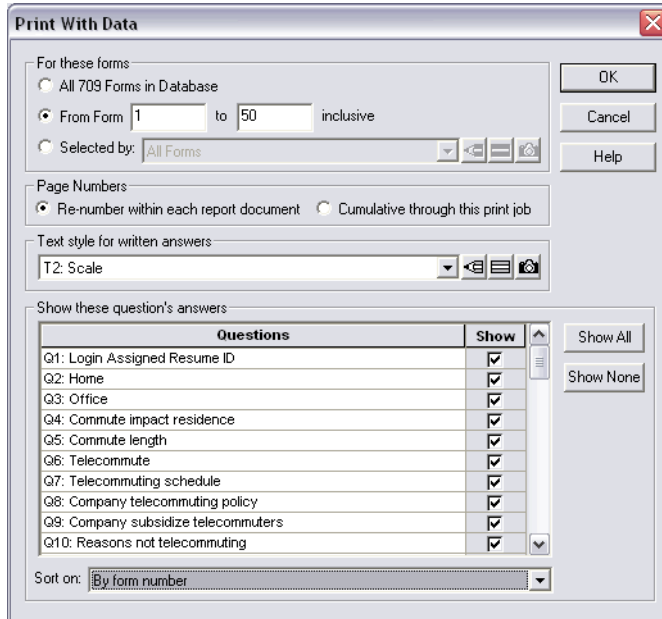
## Print with Data

*Accessed from the File menu in Answer Entry.*

Print with Data allows you to merge database information into a questionnaire form. For example, you may want to do a mail merge where you place respondent names and addresses on the questionnaire, or to merge an ID into a barcode for scannable forms. Another application is printing respondents' answers in the context of the questionnaire (see also the *Data Table Figure* on page 204).

The primary control in the dialog is your ability to select a range of forms—see *Form Select Filters* on page 212 for details on their construction.

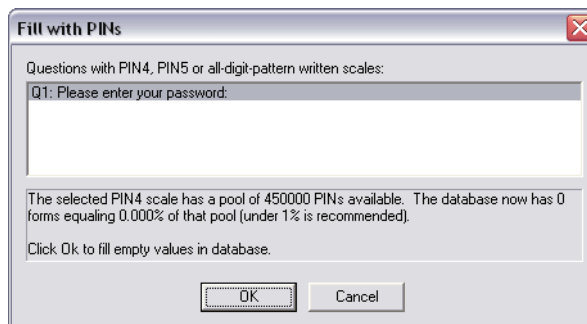




## Fill Passwords

*Accessed from the Database menu in Answer Entry.*

This is a great little utility for seeding a database with passwords. Just import your respondent contact information, adding a couple extras just in case. Make sure you have a question with a SurveyPro 4, 5, or all number PIN scale. Then go to Answer Entry, Database Menu, and click Fill Passwords. SurveyPro will add passwords to any forms which don't already have them, checking to make sure the values are unique.




# Chapter 10

## **Entering and Editing Data**

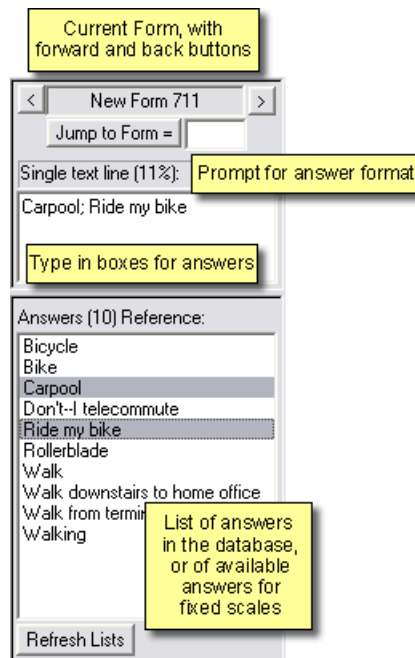
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## Data Entry in SurveyPro

Data entry has been optimized for both the mouse and keyboard, including features such as single keystroke entry for shorter checkbox and rating scales. The Answer Entry screen is automatically created from the questionnaire definition(s), and accessed from document editing through the Answer Entry toolbar button  or Database, Answer Entry.

Entry and editing are primarily handled in the left-hand side of the screen:



The panel is driven by the question selected in the current form (as indicated by an orange highlight on the right side of the screen), so any current response is highlighted in the list and may be edited in the type-in box.

### Moving from field to field


To move the highlight from question to question, you can use the mouse, Tab/Shift+Tab, or Enter keys. The only time Enter does not work is when you are editing a long written answer.

### Moving from form to form

At the top of the left panel is the current form's number and two buttons for stepping back and forward one form at a time. F9 and F10 move back and forward through forms as well. Below the buttons is a field for typing in a form number for a direct jump. In addition to these basics, there are a number of "Find" functions under the Form menu.

### Tools, Options dialog

The first tab of the Options dialog includes two settings to streamline data entry. The first, Do not require Enter key on single-digits, means that

when a checkbox or rating has less than 10 items, one numeric keystroke will mark the response and drop you to the next question. The second, Go to next form after last question answered eliminates the need for clicking next  or pressing F10.

#### **Pre-loading answers**

Under the View menu is a Preload option which lets you set the initial values in a new form. When you select Preload, the form number in the upper left changes to indicate you're entering initial values. When you're finished, select View, Preload again to resume normal entry. This is primarily used for batch entry or session information, where a number of forms share common answers, but is easy enough to change that it can be practical for even small batches.

#### **Copying answers from other forms**

The Edit menu includes two commands for copying responses from the previous form. Copy and paste can also be used to paste text into the entry box.

#### **Spell check**

Spell checking may be applied to written answers in a single response, a form, or the entire database.

## Entering data by scale type

Depending on the current question's scale, you will need to enter the answer in a particular format. Just above the type-in box is a prompt line which will remind you of the scale type.

#### **Single answer checkboxes, Ratings and Rankings**

Type the number of the response or double-click on an answer in the list. You don't need to enter the complete label.

#### **Multiple answer checkboxes**

Type one or more numbers to indicate the box or boxes checked. As each checkbox number is entered, a highlight will appear in the Answers list. Numbers may be separated by spaces, commas, periods, plus +, minus -, or slash / keys. For mouse entry, click on the first answer you're marking, then Shift+click for sequential entries or Ctrl+click to turn on and off non-sequential items.

#### **Number scales**

Enter the number value without any "\$," "%" or other symbols. The Answers list will also display existing responses which you can click to select.

#### **Dates and times**

Check the prompt line above the type-in box for the scale's preferred format. SurveyPro will accept any unambiguous response in the same month/day/year or hour/minute/second order as the scale structure.

#### **Patterns**

The underlying structure of a pattern is one of the three Written Answer formats (short, short multiple, long unique). SurveyPro's strictness on the entry (allowing spaces, etc.) depends on the definition of the pattern.

**Short, countable written answers**

Type in the response, up to 200 characters (the prompt line will let you know how much space you've used). If it is a multiple answer scale, use a semicolon “;” to separate distinct responses such as “cat; dog.” The Answer list will display up to 64,000 unique responses, which you can select by clicking. Short countable written answers are always one line, so Enter will drop you to the next field.

**Long/unique written answers**

Long/unique answers may be up to 10,000 characters, and as with short written answers the prompt line will keep track of your capacity. Normally long written answers allow multiple paragraphs, but they can also be set to Single Line for shorter unique answers such as names.

## Data Cleaning

So what is data cleaning, why do you need to do it, and why doesn't SurveyPro do it automatically?

Data cleaning exists because usually we're happy if respondents complete the survey—reading the instructions is icing on the cake.

When you receive forms with dates in the wrong format, rankings that go “1, 2, 2, 4, 5,” or “Wash” when you're using 2 letter state abbreviations, you'll need to do some data cleaning. Because it is a normal part of the survey process, SurveyPro includes a suite of tools both for minimizing and performing data cleaning.

### Questionnaire Definition

The place to start is with a well-designed survey.

Make sure your scales have the proper structure for single/multiple answer checkboxes, date scales, etc. Questions should include clear instructions about how you'd like respondents to answer. Make sure skips and branching are explicit for paper forms, and properly constructed for DirectCollect and NetCollect.

### Publish

If you are conducting the survey with a DirectCollect or NetCollect form, most potential problems can be caught while the respondent is completing the form. Do make sure the answer formatting tests are enabled in the Publish dialog and properly tested, though. Also, while your instructions may not need to be quite as detailed as for paper forms, you still need to tell respondents what you want so they're not frustrated by unnecessary error messages.

## Import

Every SurveyPro import has the option of cleaning the data. This includes whether you'd like to enforce pattern scales (such as telephone numbers), required answers, and passwords. Responses which do not match a set format, such as a date or number scale, are brought up for manual correction. This cleaning pass is usually the fastest way to correct entries, so even if you're in a hurry to see your results, we strongly recommend taking a couple minutes to perform the scan during import.

## Answer Entry

Both SurveyPro and KeyCollect data entry screens will pick up your questionnaire structure and enforce the entry rules as new forms are entered.

For existing forms, there are several tools available:

- Tools, Data Cleaning performs a scan similar to the one in Import. It can also apply a password to paper survey data. See page 126.
- Form, Find commands bring up navigation palettes which list all the forms matching your criteria. Click on a form number to jump to it for editing. A marker \* will be placed next to forms which have been changed. See also *Form Select Filters* on page 212.
- Database, Answer Replace takes answers in one question and replaces them with another. This is a great time saver for consistently coding Other blank responses and short written answers. See page 130.
- Database, Mass Replace is a super-set of the Answer Replace function. The rule for selecting the forms whose value you want to replace can be far more complex than in Answer Replace's. See page 129.
- Database, Mass Delete clears forms from the database based on a form range, or filter, or for all forms. See page 128.

## Analysis

If for some reason you want to exclude forms from your analysis, use a Form Select Filter (see page 212). This can be done quickly for an entire document with Report On (see page 238). Rescales (see page 216) may also be used to group similar responses, though coding them consistently in the database is usually a better approach.

## Postcoding

Postcoding is modifying a questionnaire and/or data after collection to optimize it for analysis. Many of the common applications, such as Zip code grouping and product name tabulations, are handled through SurveyPro's data cleaning (see page 123), and rescales (see page 216).

Postcoding can also be used to add questions to the survey which allow you to enhance the respondent data. Two examples are:

### Coding comments

A wonderful way to work with open-ended responses is to pair them up with a multiple-answer short countable written scale. By adding this field to the questionnaire after printing or publishing, you can keep the verbatims intact while encoding them about subject, attitude, or any other factor.

If you are encoding answers on several dimensions, such as product name and attitude, you may want to add a question for each aspect. Or, if you use a multiple answer written scale you can include several attributes in one, such as "Negative; Products; Services."

During analysis, you can use the short written scales in Form Select Filters (see page 212) to extract sub-groups of respondents, or even to cross-tab the written answers themselves (see page 211).

### Merging information

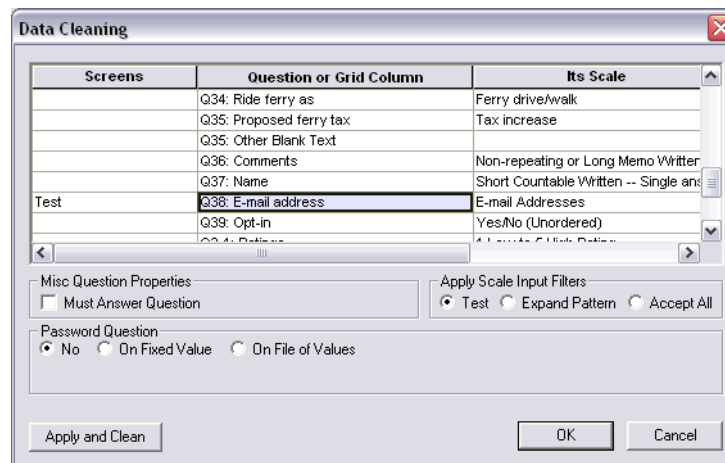
When respondents are identified with a unique customer or employee ID, you can merge information from other sources with your survey data for common analysis. For a customer survey, rather than asking respondents to provide purchase history (since this type of question is hard work for them and produces inaccurate responses), simply ask for their customer ID. Then add questions to the survey that can receive the additional information, and merge in the information from your invoicing system using their ID as a key (see page 151).

## Data Cleaning Dialog

*Accessed from the Tools menu.*

This dialog is very similar to the ones during import, and allows you to manage your database after collection.

The options in the lower half of the dialog depend on the structure of the selected question or grid, so if you don't see an option you need, check your scale definition. Questions which don't have a screen indicated in the first column will be ignored when you click Apply and Clean. Must Answer is the only one which applies to all question types—the other controls are covered further down this page.



### Screens column

The first column lists the “test” which will be performed on the data, such as a password screen or pattern check for an ID.

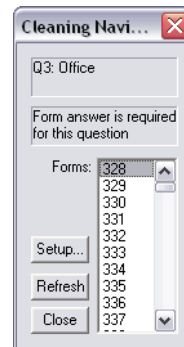
### Must Answer Question

Must answers are the only universal settings, and are absolute, so they should generally only be used when the form is invalid without an answer.



## Cleaning Navigator

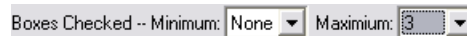
Once you click Apply and Clean, this navigation palette will pop up:



To jump to a matching record, just click on a form number in the list. Click Setup to bring the main dialog back, and Refresh to update the form list after you make edits.

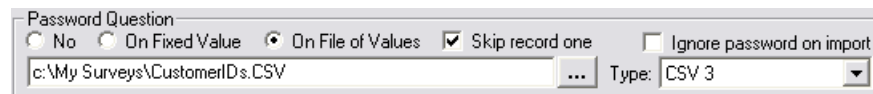
## Checkbox and Rating Scales

For multiple answer checkbox scales, you can specify a minimum or maximum number of boxes which can be selected:



## Written Answer and Pattern Scales

For each import there can be only one password field, whether it's a single value or file.



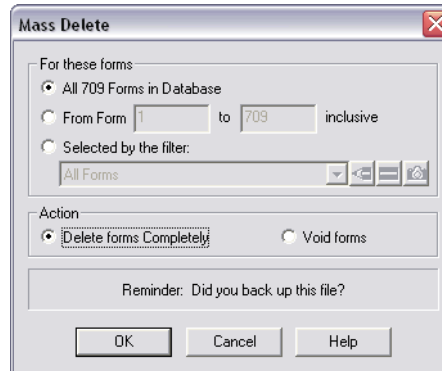
In addition, pattern scales can be enforced or loosened to allow data through.



## Mass Delete

Accessed from the Database menu in Answer Entry.

Individual forms can be deleted one by one, but if you want to clear out a block of forms Mass Delete is the tool to use. You'll find Mass Delete inside Answer Entry, under the Database menu. **This is a permanent operation, so we recommend creating a backup before beginning.**



### For these forms

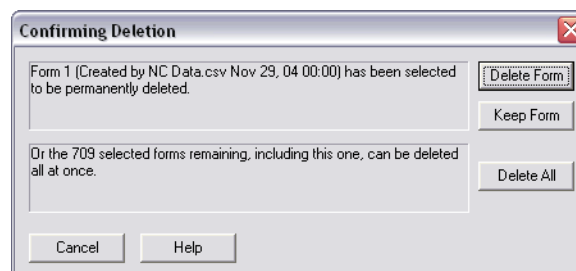
Select among these options for a range of forms or the entire database. Remember that you can perform analysis on a subset of the data without deleting records.

### Action

Regardless of whether you choose Delete or Void, the data will be gone. The only difference is that Void leaves a placeholder so the form numbers after the deleted forms remain the same as before the Mass Delete.

### Confirmation

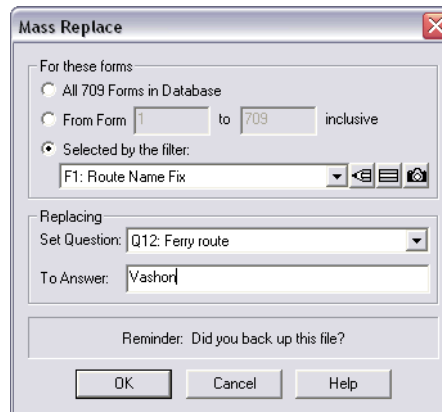
When you click OK, you'll be prompted with a confirming dialog. You can either delete the forms one-by-one, keep them, delete all at once, or cancel the operation.



# Mass Replace

*Accessed from the Database menu in Answer Entry.*

Mass Replace changes the answer to a question in forms which match your selection criteria, whether it's for the entire database or a complex filter. However, if all you want to do is a simple replacement of one answer for another, you can use Answer Replace on page 130. **This is a permanent operation, so we recommend creating a backup before beginning.**



**For these forms**

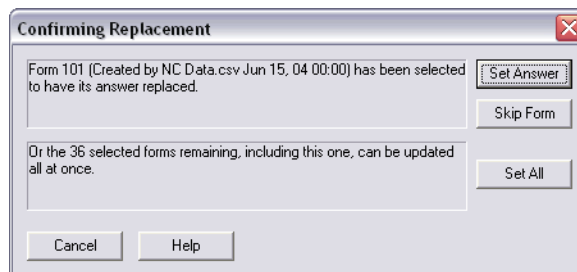
The criteria you use to select the forms can be completely unrelated to the question whose answer(s) you're replacing.

**Replacing**

Select a question you want to update, and the value you'd like to set. For the answer, type it just like you would in Answer Entry, such as the box number for a checkbox value.

**Confirmation**

When you click OK, you'll be prompted with a confirming dialog. You can either update the forms one-by-one, update all at once, or cancel the operation.



## Answer Replace

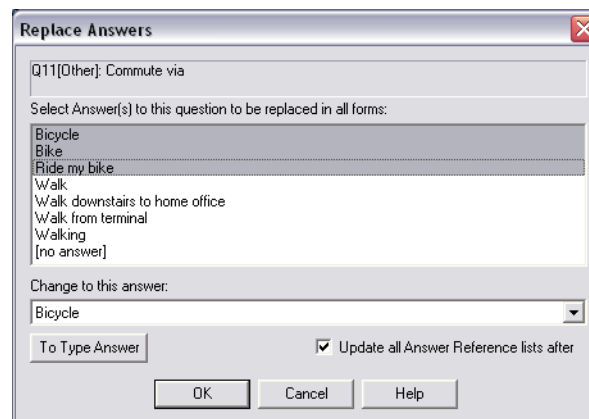
*Accessed from the Database menu in Answer Entry.*

Answer Replace literally replaces one answer with another within the same question. Mass Replace can also do this, but takes a little longer since it's geared for more complex replacements (see page 129).

The most common application is consistently coding short written answers for tabulation, such as replacing instances of “Wash” with “WA.” However, it can be applied to any scale type, not just text. You can also replace just one answer within a multiple answer checkbox or written scale.

To replace answers, just select the question in Answer Entry mode, then select Answer Replace from the Database menu. You'll be provided with a list of all current responses, and can use Ctrl+Click or Shift+Click to select multiple answers to replace. The value you use to replace can be either from the drop-down list or click Type Answer to add a free-form response.

After clicking OK, you'll see a confirmation dialog and then a message indicating the number of replacements.



### **Q#: Name**

The question whose answers you're replacing. If it's not the right question, click Cancel, select the right field, and try again.

### **Select Answer(s)**

List of all current responses to the question. To access Other blank text entries, you have to select the Other blank itself, not the block of checkboxes.

### **Change to this answer**

List of current responses from which you can select a replacement answer. For type-in scales (written answers, dates, etc.) you can click Type Answer to add a new response.

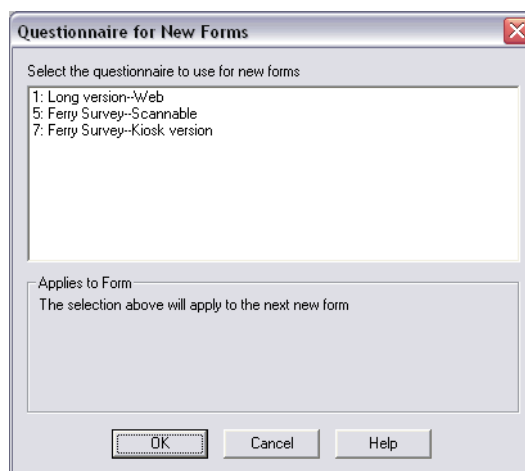
<b>Type Answer</b>	Toggles the drop-down list to a type-in field and back. Only appears for written, date, number and pattern scales.
<b>Update all Answer Reference lists after</b>	Updates the answer list for the current question when you finish the replacements. Generally you will only want to disable this if you are doing repeated replacements on the same question in a very large database.

## Questionnaire for New Forms

*Accessed from the Edit menu in Answer Entry.*

When a project contains multiple questionnaire versions, SurveyPro needs to know which document to use when entering new forms. This dialog allows you to select the questionnaire for entry, and will not affect your ability to view or edit any existing forms.

To select other survey for data entry, you can choose this option again from the Edit menu (or exit and reenter Answer Entry).



# Chapter 11

## Working in Answer Entry

While not everyone needs to enter new forms, searching and editing the database is an almost universal task.

In this tutorial you'll learn how to:

- Enter new forms in the database
- Set entry preferences for faster input
- Replace answers on multiple forms at once
- Find forms based on a Form Select Filter

### Tutorial Notes

<b>General</b>	You can save your file and take a break any time you're in the main document screen.
<b>Tutorial Files</b>	Are in your <b>SurveyPro Samples</b> folder, by default under: C:\Program Files\Apian Software\SurveyPro 40\

1. Start SurveyPro, log in, and if the window isn't filling the screen, maximize it.
2. **File, Open Data Entry Tutorial.SP4** and save as **YourName Data Entry Tutorial.SP4** when prompted.
3. The File History dialog gives you a brief overview of the project's contents. Click **Close**.

### Entering forms with the mouse

This is a fairly typical project, with a rating grid, multiple answer checkbox, long comment, short tabulated written answer, and a date. First let's enter a couple forms, so you get the idea of how editing the different scale types work.

1. Select **Answer Entry** from the **Database** menu, or click the toolbar button .

The screen changed dramatically when you switched into Answer Entry, because this area of SurveyPro is optimized for data collection instead of document editing.

The screenshot shows the SurveyPro software interface. The main window displays a questionnaire for "HOTEL OMBREUX". The title is "May we have a moment?". Below the title is a thank you message: "Thank you for visiting Hotel Ombreux! If you have a moment, would you please share your experience and interests with us so we may better serve you in the future?".

The questionnaire includes a rating grid for various hotel services. The columns are labeled "Very Important", "Unimportant", "Excellent", and "Poor". The rows are "Front Desk", "Hotel Room", "Dining Room", "Room Service", and "Concierge". The "Front Desk" row is highlighted with an orange bar, indicating it is the current field selected for entry.

Below the rating grid is a "Comments?" section with three lines for text entry. At the bottom of the form, there is a question: "When you travel, what are your favorite hotel amenities? Please mark up to 3:". The status bar at the bottom indicates "T3, Q1, Form created Jan 20, 07 08:20 by a, ID hcn4-3jc5-5nn".

The left sidebar contains a navigation panel with "New Form 533" and "Jump to Form =". Below this is a section for "Answers:" with a list of possible or existing answers to the current question: "1-Very Important", "2-", "3-", and "4-Unimportant".

On the right is an image of your questionnaire, with the first field selected for entry.

The status bar at the bottom of the screen indicates the current field, when the form is being added and by whom, and the unique ID this form will have (Form numbers can change if records are deleted).

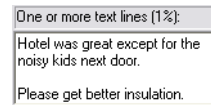
On the left are three sections: a simple navigation panel around “New form 533,” a type-in area for responses just below, and a list of possible or existing answers to the current question.

Data entry can be done by either keyboard or mouse—let’s try the mouse first. With the mouse, you can select an answer from the list with one click, or double click to select and jump to the next question.

2. Double-click on answers **in the list on the left** until all ten rating grid questions have responses.

Note that the highlight jumped between separate small fields in the scale columns. If you ever want to select and edit a grid response, you need to click on the scale instead of the question text.

3. When your highlight has landed on the Comments question, click in the type-in box at the upper-left and enter an answer—anything you'd like, including paragraph breaks.



There are three things to note while in this question. First, the line of text above the type-in box says “One or more text lines,” letting you know that this is a long written answer. Second, the percentage next to that prompt is an indicator which will track how many of the 10,000 possible characters you’ve used up. Third, the Answer Reference List below the type-in box is grayed, because these responses are assumed to be unique.

4. Enter will just add another paragraph break for this type of question, so press **Tab** to move forward.

This is a multiple-answer checkbox scale, as you can tell from the prompt “One or more box numbers.” With a mouse, you treat this like standard Windows multiple-select lists.

5. Click in one of the answers in the list, then Ctrl+click on additional responses. You can also use Shift+click to select sequential items.
6. Make sure one of the boxes you select is **6-Other**.
7. Press **Tab** to move to the next field.
8. That question had an answer test, so SurveyPro may have popped up an error message. If it did, click Correct, reduce the number of boxes selected to three or fewer, and click **Tab**.

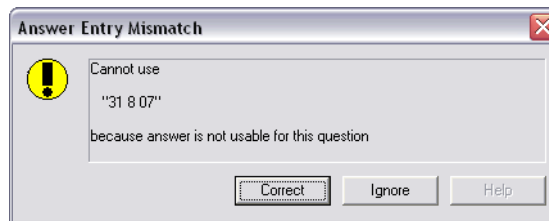
Because you selected the Other box, your highlight is now on the Other blank for a text entry—otherwise SurveyPro would have skipped ahead to the next question. The Answer Reference List is filled up with the existing answers in case you’re trying to code responses for tabulation.

9. Double-click on any of the items in the Answer list.
10. Double-click on an answer for the trip purpose question.




Now for the date. While SurveyPro will list up to 64,000 unique dates in the Answer list, sometimes you need the one that's missing. Above the type-in box, you'll see the prompt is letting you know the entries should be like Apr 30, 2007, but SurveyPro is actually a bit more flexible on what it will accept.

11. Click in the entry box, type 31 8 07 and press **Tab**.



12. Click Correct on the error message.
13. This time, try typing 8 31 07 and pressing **Tab**.

Now SurveyPro takes the value, because even though it wasn't a very descriptive entry, it does match the Month-Day-Year order of the scale. SurveyPro will take other formats as well, such as "F/28/07" for February 28th, but not "A 28 2007" because "A" could apply to either April or August. Whenever it accepts an entry, SurveyPro reformats it to match the scale style.

14. Your highlight should now be on the State question, and the Answer list populated with entries. Double-click on one of the existing answers.
15. The form is complete, so click the Forward button  at the top-left of the screen or **F10** to move ahead.

You probably noticed the little "saving" message as you advanced. SurveyPro saves each form as you leave it, whether it's an addition or edit. The saves are to a working data file to save time, and when you leave Answer Entry, SurveyPro confirms that you want to merge the changes with your SP4 file.

## Changing data entry preferences

If you're a keyboard enthusiast, you'll find SurveyPro's data entry very fast. Many of the commands can also be made on a 10-key pad.

1. First, go to the **Tools** menu and select **Options**.
2. In the middle of the dialog is an Answer Entry panel—turn on **Do not require Enter key on single-digits**.

**3. Click **OK**.**


This will speed things up quite a bit, since for each of those rating items in the grid you'll just have to type one character, with no Tab or Enter required to advance fields.

## Entering forms with the keyboard

1. Click in the entry box in the upper-left.
2. Using your regular or numeric keypad, type a value from 1-4 for each of the grid items.
3. You know how the comments work, so just press **Tab** or **Enter** to skip over it.
4. Like dates, multiple answers may be entered in several formats. Type 1.3-4 and note the highlight added to the Answer list with each new number.
5. Press **Enter** to advance.

## Data cleaning text answers

Any time you need to change an answer in the database, you just go to the form, click on or Tab to the question, and change it. Or, if you need to change several items, you use one of the tools we're covering next.

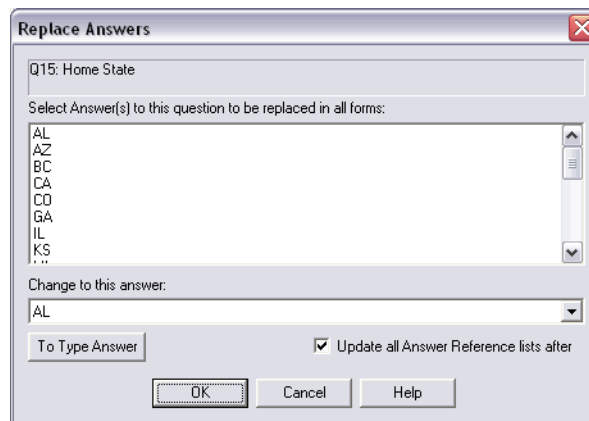
1. Press **F9** or use the back button  to skim through a few forms. Note that the responses change on the form each time you move.

Cleaning data by going form-by-form would take forever so let's give it a try with some tools for finding and replacing answers.

2. Click on the Home State question at the end of the survey.

In the Answer list you'll see that most of the data is 2-character abbreviations, but a few exceptions could be problems for analysis—especially since Washington is listed three ways and would therefore tabulate as three items.

3. Under the **Database** menu, select **Answer Replace**.



At the start, both the tall scrolling list and the drop-down list below it contain the same answers. The assumption is that you're trying to consistently code written answers, consolidating similar entries.


4. Scroll the top list until you reach the end. Click on **Wash**, then Ctrl+click on **Washington**.
5. From the lower drop-down list, select **WA**.
6. Click **OK, Yes** at the confirmation dialog, and **OK** to close the report about the number of forms updated.
7. Once again, go to the **Database** menu and select **Answer Replace**.
8. This time, select **New York** in the upper list.
9. Since NY is not in the database yet, click the **To Type Answer** button at the bottom of the dialog.
10. Type NY in the entry blank that just appeared.
11. Click **OK, Yes** at the confirmation dialog, and **OK** to close the report about updating 1 form.

The same dialog can be used to consolidate the similar entries in the Amenities question's Other blank.

Another tool for replacing answers is Mass Replace, also under the Database menu. While Answer Replace is limited to replacing values within one question, Mass Replace can use a variety of criteria to set answers. For example, if a batch of data wasn't marked with a location code, you could create a Form Select Filter on a range of data entry dates and change the location for all forms matching the filter. In general, if you need a replacement that Answer Replace can't handle, use Mass Replace.

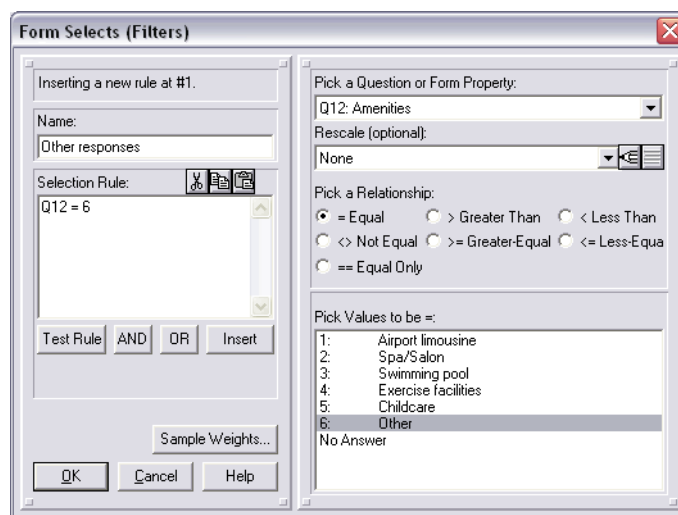
## Finding forms for data cleaning

Under the Form menu are three “Find” functions Each one has a specific application, and the one we’re going to use here is Find Form Select.

1. Pull down the **Form** menu and click **Find Form Select**.
2. There are no filters defined, so click the Insert button  to add one.

Form Selects can be typed manually, but usually they’re built in the dialog by selecting a question, relationship, and values.

3. In the upper-left corner, type the filter **Name** Other responses.
4. From the **Pick a Question or Form Property** drop-down list at the upper-right, select **Q12: Amenities**.
5. Click the **= Equal** radio button below.
6. From the list of answers, select **Other**.
7. Click the button labeled **Insert** on the left side of the dialog to transfer the filter to text.

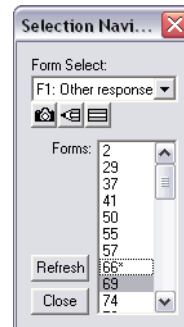


8. Click **Test Rule** to find approximately 35 forms (depending on your entries), and click **OK**.

Now the palette is filled with a list of forms matching your Form Select. You may not have noticed, but some of the forms which had the Other box marked but no text in the entry blank.

9. Click on the Other blank to select it—that way you can see its responses in the Answer list as we search.

10. Click on the form numbers in the navigation palette until you find a form with no Other text.
11. When you get to a matching form, click on the multiple answer checkbox scale.
12. Ctrl+click on **6-Other** in the Answer list to turn it off.
13. Click another form number in the navigation palette list.



Note that the form number of the record you edited is now marked with an asterisk “\*” to indicate it was edited. To save time (especially on large files), SurveyPro doesn’t update the Answer list with every edit, so even though the form you changed no longer matches the rule, it’s still in the list.

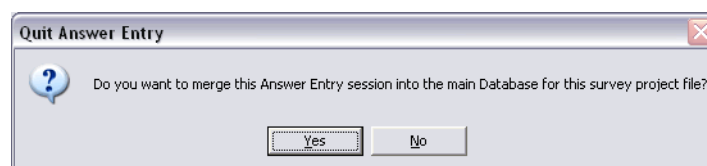
14. Click the **Refresh** button on the navigation palette, and see the form number disappear.

While there’s a great deal more to data cleaning, those are the essentials of adding, updating, and finding forms. See also *SurveyPro’s Database* on page 110 and *Data Cleaning* on page 123.

## Finishing your session

Generally you’ll return to the main document editing screens after a data entry session:

1. Close the navigation palette.
2. From the **File** menu, **Quit Answer Entry**.



Most of the time you'll click Yes on this dialog, merging you data entry session into your main SP4 project file. On very rare occasion, such as an "Oops" during data cleaning, you'll discard the session with No.

3. Click **Yes** to save your changes, then **Exit** SurveyPro.

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## Import/Export Fundamentals

If you have not already done so, you may want to read *Database Fundamentals* on page 111 to acquaint yourself with some of the terms.

SurveyPro can import and export a variety of data formats. Some formats are fairly sophisticated, containing information such as the field structure (date, number, text), while others contain only the basic data. While data files with more information minimize the transfer time and potential errors, they're not always compatible with the applications or operating systems you're using.

### More Structure

SurveyPro family files

Survey Tag Language

MS Access or ODBC

Comma/Tab Delimited or Fixed ASCII

### Less Detail

### SurveyPro family files

When you're moving data among SurveyPro and the Collect programs, your best choice is one of these formats.

<b>DirectCollect</b>	SDD	For exchanges with DirectCollect, both for empty templates and for files with completed responses. To create a DirectCollect file with data, use Publish.	Import on page 146
<b>KeyCollect</b>	SDE	Primarily for importing from KeyCollect or filling KeyCollect files with data for additional entry or editing, but can also be used to exchange data between SurveyPro project files. To create a KeyCollect file with data, use Publish.	Import on page 146 Export on page 160
<b>NetCollect</b>	SDH	Format saved to your Web server by the NetCollect scripts. In addition to the responses, the file includes a date/time stamp, page number, form ID, and Q numbers.	Import on page 146
<b>Survey Pro 2.0</b>	SVA	SurveyPro 4.0 will open a 2.0 SVA file and save to a SP4, converting elements such as written answer scales and grids. If you need to exchange files with someone on an older version of SurveyPro, export to Survey Tag Language 2.0 (STL).	Import on page 146 File Open on page 3



<b>SurveyPro 3.0</b>	SP3	You can open a 3.0 SP3 file and save to a SP4 with very little impact to the documents. If you need to exchange files with someone on an older version of SurveyPro, export to Survey Tag Language 3.0 (ST3).	Import on page 146 File Open
<b>SurveyPro 4.0</b>	SP4	The best format for combining entire SurveyPro databases (to merge only part of a database, export to KeyCollect SDE, then import into SurveyPro).	Import on page 146 File Open

## Survey Tag Language files

Survey Tag Language files can be opened to create a new project file, as well as used to exchange data among Apian's products and our partners'.

<b>Version 2.0</b>	STL	STL files are compatible with SurveyPro 2.0, so you can export a SurveyPro 4.0 project to STL, and users with older versions can open it.	Import on page 146 Export on page 160 File Open
<b>Version 3.0</b>	ST3	A more detailed file format, including specifications for the new scale types introduced in SurveyPro 3.0, this is the better approach for users. Can also be used by SurveyPro 4.0 to create templates by exporting a file with no data but all the file's scales or exchange files with SurveyPro 3.0 users.	Import on page 146 Export on page 160 File Open

## MS Access and ODBC

For many users, these will be the primary tools for transferring data between SurveyPro and other applications.

<b>Microsoft Access</b>	.MDB	Compatible with a wide range of applications, and includes field information. Export creates a MDB file from scratch.	Import on page 148 Export on page 163
<b>SQL</b>		Allows you to exchange data with enterprise databases.	Import on page 148 Export on page 165

## ASCII Data

We're down to the workhorses of data transfer, used for the vast majority of imports and exports because they are the least common denominator. ASCII formats are not only compatible with a wide range of applications, but are also cross-platform.

<b>Delimited</b>	CSV	Comma and tab delimited ASCII are structurally the same—the only difference is whether a comma or a tab is used to separate the fields. Delimited ASCII is the best choice for files with text fields, and also makes it easier to match up fields when importing into the final application.	Import on page 147
	TXT		Export on page 162
	TAB		

## Import Dialog

Import can be used to add entire new forms to the database, or to merge information from a data file into the existing database. The second technique is called “keyed” import in SurveyPro, as it requires a common key field in both the existing data and the import file to match them together. Keyed import is most often used for merging together data files from multi-page NetCollect surveys, or adding information from a customer or other company database to the survey data.

The two most common sources of import problems are:

- Editing the questionnaire after documents have been printed or published. If the Q numbers and/or scale structures have been changed, it becomes difficult or impossible for SurveyPro to automatically match up fields.
- Exporting data from a third-party application without checking SurveyPro’s data file preferences.

Both of these can cause a number of time-consuming problems, and both are easily avoided. We recommend always testing the entire survey process—from the content of the questionnaire to collecting the data to producing test figures—before launching your study.

### Steps for any import

Regardless of the type of file you are importing, you will go through these steps:

1. Select a file type
2. Select a file name and location

3. Choose a previously created import map, and/or specify details of the file format and forms to be included
4. Match the import file's fields to questions
5. Set key controls to merge import data into the current forms (optional)
6. Clean for passwords, duplicates, coding open-ended responses, etc. (optional)
7. Type a name for the export map you've just created (optional)

**Field names**

If the data file includes field names, you can use them to automatically match up the data file's fields to SurveyPro's questions. SurveyPro includes default matchups, or you can define custom sets (see page 170).

**Data values**

The compatible file formats are listed on page 142. Ideally, checkbox and rating data should be coded with the numeric value, not the plain text label, though the Scale Value Matchup dialog can take care of mismatches. For written answers, SurveyPro can take any ANSI characters, and will safely import and export double-byte languages (Chinese, Arabic, etc.), though characters will not be legible within SurveyPro.

**Import maps**

For each import file type (ASCII, MDB, etc.) SurveyPro will store a set of import maps which remember all your file format, field matchup, key and data cleaning settings. Saving your settings can streamline any repeated imports.

**Log files**

At the end of every import you will see a log file with detailed information about the file source, forms added, mismatches, and other aspects of the import. If SurveyPro encountered any difficulties, this is where they will be reported. Logs are also stored in the Tools menu, File History dialog for later reference.

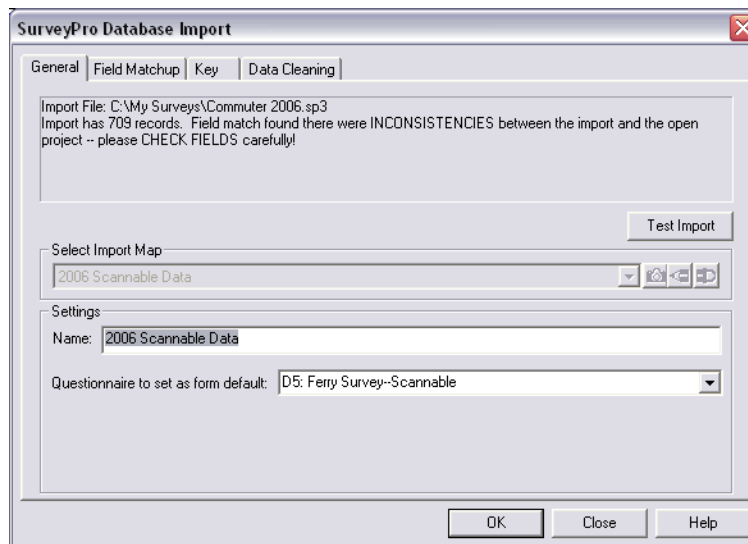
*Importing Data* on page 172 provides a detailed walk-through of the import process, from matching up your fields to questions, to key settings, to data cleaning tools. While the Collect programs automate many of these settings, if SurveyPro encounters a problem you will need to use the standard dialogs.

## General Tab for SurveyPro Family Files

This includes SurveyPro project (SP4, SP3), Survey Tag Language (ST3, STL), KeyCollect data (SDE), NetCollect data (SDH) and DirectCollect data (SDD) files.

You can merge information from different SurveyPro files using the SP4 import. Or, if you only want to import a few forms from a SurveyPro file, export first to the Survey Tag Language (ST3), then import that file.

Whenever you're importing a SurveyPro family file, the software will look at the questions and scales and attempt to match up all the fields. Pay special attention to the notice at the top of this first screen as it will tell you whether the files are a match or if you need to check the Field Matchup tab (see page 149).



### Notice

Before you see this dialog, SurveyPro has already scanned your file selection for possible problems. Be sure to check this panel for any warnings.

### Import Map

If the import may be repeated, it's helpful to save the settings as a named map. Maps are specific to a file type, and include settings in all four tabs.

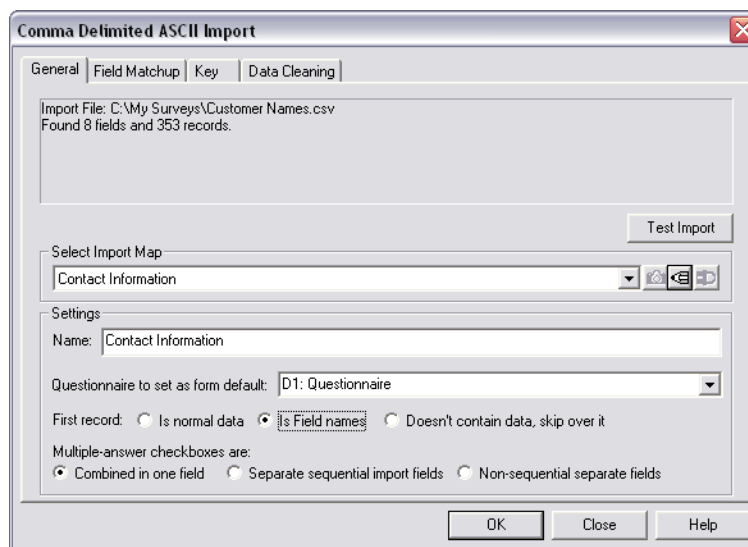
### Questionnaire to set as form default

If your file contains multiple questionnaires, you'll need to tell SurveyPro which version you want to use for the new forms.

## General Tab for Comma/Tab Delimited ASCII

The controls for comma and tab delimited ASCII are identical, so both are documented here. For the pros and cons of delimited ASCII see *Import/Export Fundamentals* on page 142.

If you don't have any Import Maps saved, you'll go through the four dialog tabs as a wizard. Only the General and Field Matchup screens are required to import data—the others serve specialized needs for merging pieces of records and cleaning respondent data. As with all SurveyPro tabbed dialogs, it's best to make your settings in the General tab first since they can affect the remaining tabs.



**Notice** Before you see this dialog, SurveyPro has already scanned your file selection for possible problems (such as irregular record lengths or field counts). Be sure to check this panel for any warnings.

**Import Map** If the import may be repeated, it's helpful to save the settings as a named map. Maps are specific to a file type, and include settings in all four tabs.

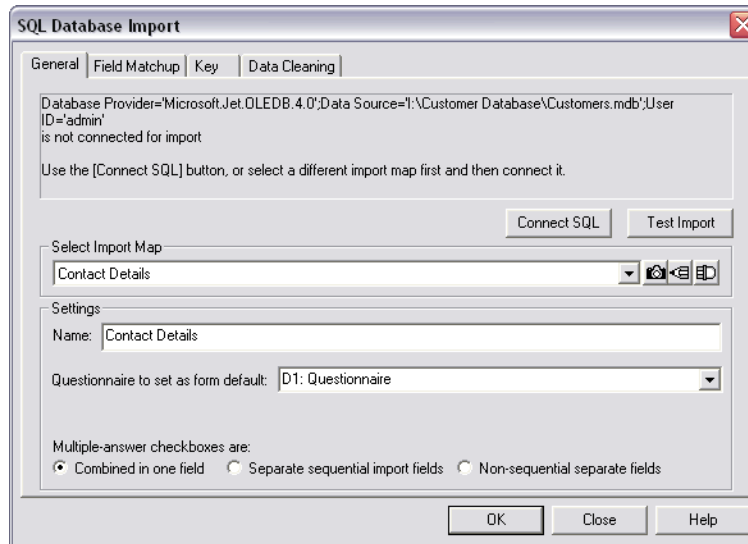
**Questionnaire to set as form default** If your file contains multiple questionnaires, you'll need to tell SurveyPro which version you want to use for the new forms.

**First record** The first record of ASCII data files often includes field names instead of labels. If so, tell SurveyPro here.

**Multiple-answer checkboxes are** There is no database standard for multiple answer scales, so the two formats are as a single field separated by semicolons "2;4;5", or as a set of yes/no or on/off fields "0,1,0,1,1".

## General Tab for Access MDB and SQL Databases

Import allows you to select a table within your MDB file or SQL database and bring it into SurveyPro. You can add the information from additional tables by keying on a unique value.



### Notice

Before you see this dialog, SurveyPro has already scanned your file selection for possible problems (such as irregular record lengths or field counts). Be sure to check this panel for any warnings.

### Connect SQL

Click the Connect SQL button to connect to create a new import connection. Or, to use a previously defined setup, select an import map and then click this button to connect. See page 169.

### Import Map

If the import may be repeated, it's helpful to save the settings as a named map. Maps are specific to a file type, and include settings in all four tabs.

### Questionnaire to set as form default

If your file contains multiple questionnaires, you'll need to tell SurveyPro which version you want to use for the new forms.

### Multiple-answer checkboxes are

There is no database standard for multiple answer scales, so the two formats are as a single field separated by semicolons "2;4;5", or as a set of yes/no or on/off fields "0,1,0,1,1".

## Field Matchup Tab

Depending on whether you're importing a SurveyPro file or a general file format such as ASCII, this screen may be automatically filled in for you.

### **SurveyPro family files**

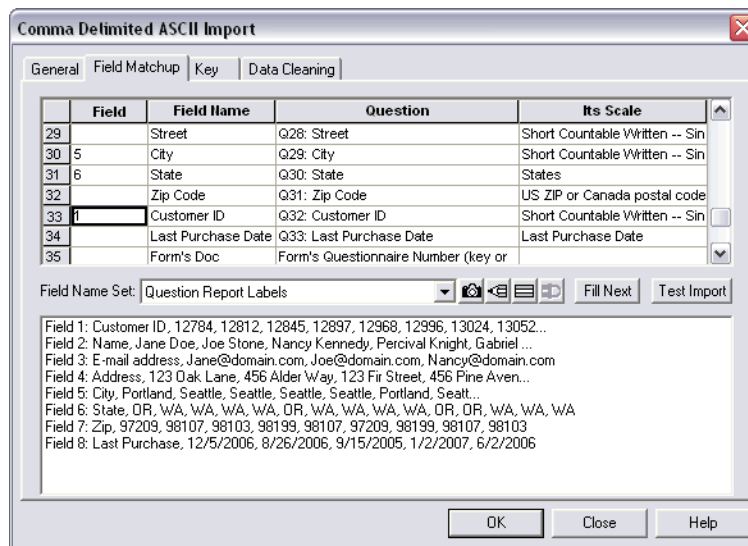
Unless SurveyPro finds a discrepancy between your open SP4 and the file you are importing, you should not have to manually set field matchups. For Collect files, if SurveyPro gives you a warning in the General screen it often means the survey was edited after the Web, kiosk or KeyCollect data collection began, which means you need to very carefully check the match-ups. With SP4, SP3, and ST3 imports, it's not uncommon to be merging slightly different sources, so just be careful to check the match-ups.

### **ASCII, MDB and SQL imports**

In the Field Matchup screen you're just linking the import file's fields to the correct questions in the file. This is done manually by clicking in the field column and typing the field number you see in the peek window at the bottom of the screen. If your import file's field numbers (or a subset) are in the same order as the SurveyPro questions, you can use the Fill Next button to set field matchups after the first.

If the first record of your file contains field names (and you indicate it in the General tab), there's an automatic approach you can take called the Field Name Set. The sets already defined are for standard SurveyPro question IDs, such as Q numbers and report labels. If your source file uses a different set of labels, use the insert button next to the field name set to add your own. Then, when you select a Field Name set which matches up the import file's first record to your questions, SurveyPro automatically fills in the first column matchups. See page 170.

Note: If the question names do not seem to match the questionnaire, it is because their Report Labels need to be updated. See page 248.



- Field** Type the field number which matches the question, or type the first in a series and use the Fill Next button to enter the rest.
- Question/Its Scale** Questions and scales in the file. This is the master list, not just the contents of a single questionnaire.
- Field Name Set** If your data files include field names in the first record (and you'll be repeating the import), create a Field Name Set to automatically match fields to questions.
- Fill Next** Fill Next increments field matchups for quick setup when your import file's fields are in the same order as the SurveyPro file's questions.
- Test Import** If you're uncertain of your settings, the Test Import button is a quick check to ensure everything is fine. It produces a report similar to the Log you'll see on a completed import.
- Preview Window** The lower half of the dialog shows the first few records of your data source.



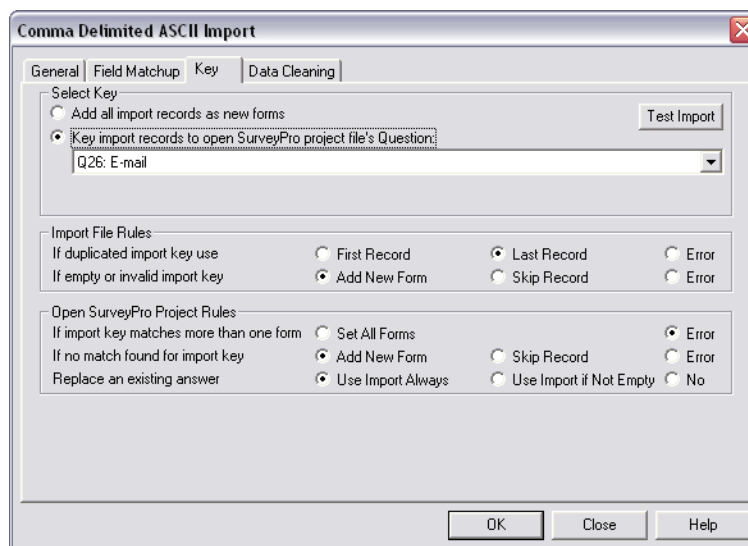
## Key Tab

By default, SurveyPro adds imported data as complete forms at the end of your current database. However, you can also use a “keyed” import to merge information from the import file into existing forms. Two common applications are:

- Adding individual respondent information from another source, such as from a customer contact database
- Coding data similar to a Rescale, such as adding city names based on a Zip code

To do a keyed import, the first step is to select the question, such as a customer’s e-mail address, which will be used to match imported records to the existing data. Everything else on the screen is used to handle the exceptions, such as having two forms containing the same e-mail in either the imported file or existing SurveyPro data.

It's a bit confusing at first, but if you're ever unsure just set everything to Error and try Test Import. This way SurveyPro will report any problems before importing anything.



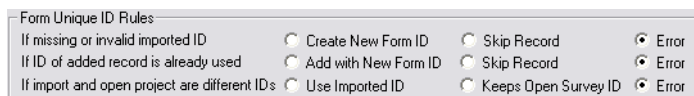
### Select Key

For most imports, this defaults to “Add all import records as new forms.” If you’re importing a Collect file including the Form ID (FID), then it defaults to keying on that value (to prevent duplicates) or adding new forms if it doesn't find a match. When you switch this to Key import, you can select one of the questions you’re importing into as the shared link. The key does not have to be a unique value in SurveyPro or the import file.

- If duplicated import key use** If the file which you are importing contains more than one record with the same key, then would you like SurveyPro to use the first instance, last, or stop and produce an error?
- If empty or invalid import key** If the file you are importing has a form with nothing in the key field, would you like a new form added, the form skipped, or an error?
- If import key matches more than one form** In the SurveyPro file's existing forms, a key value is used in more than one form. Would you like the import file's data merged with all instances or an error?
- If no match found for import key** One of the key values in the import file does not exist in the SurveyPro database. Would you like a new form added, the import form skipped, or an error?
- Replace an existing answer** Among the fields being imported, data may already exist in the SurveyPro database. If so, would you like this replaced with the import file's data, only replaced if it's not a blank field, or never replaced?

### Form Unique ID Rules

This last set of controls only appears in the fringe case of a Collect Form ID (FID) being imported, but not being used as the key. Regular Key-Collect, DirectCollect and NetCollect imports key off this automatically generated but unique ID to prevent double imports of the same forms. If you do encounter this condition, you may want to contact Technical Support, because many times we can find an easier way.



- If missing or invalid imported ID** If an individual record within the import file does not have a Form ID, then you have an option of creating a new FID or having SurveyPro skip the form.
- If ID of added record is already used** This is a very unlikely case, so it's best to leave it on Error. If your SP4 file contains Form IDs, and the import file contains Form IDs, and there's a form where its FID is the same as an existing record in the SP4 but which isn't the one to which it is merging, then you can add the record with a new FID or skip it. If you do encounter this condition, you may want to e-mail your files to Tech Support for assistance.
- If import and open project are different IDs** When you match up an SP4 and import record using your key question, they should have the same Form ID or the SP4 record should be empty. However, if they both have FIDs and they're different, you can select which one to retain.

## Data Cleaning Tab

The Data Cleaning tools let you:

- Specify Must Answer questions
- Screen for passwords
- Enforce or loosen pattern checking on telephone numbers, zip codes, etc.
- Map data within a field which doesn't match the checkbox labels (such as a,b,c,d instead of 1,2,3,4)
- Manually check all responses to a question for coding open-ended answers
- Correct responses which don't match your scale's format, such as dates or numbers

While you can also use the data cleaning tools in Answer Entry (see page 123), that is generally reserved for consistently coding responses. The import cleaning dialog is critical for correcting any answers which do not match the scale format (dates, numbers, patterns) and therefore would not import into the file.

You'll see the settings in the dialog change depending on the scale of the selected question. Must Answer is the only one which applies to all question types—the other controls are covered further down this page.

With Collect files, all of your Publish settings for passwords and other field checking will be pre-loaded in this dialog.

**Comma Delimited ASCII Import**

General | Field Matchup | Key | **Data Cleaning**

Screens	Field	Question or Grid Column	Its Scale
Key,Test	3	Q26: E-mail	E-mail Addresses
	--	Q27: Gender	Your gender:
	4	Q28: Street	Short Countable Written -- Single a
	5	Q29: City	Short Countable Written -- Single a
	6	Q30: State	States
Test,Corr	7	<b>Q31: Zip Code</b>	US ZIP or Canada postal codes
	1	Q32: Customer ID	Short Countable Written -- Single a

Sample of File Answers: Field 7: Zip, 97209, 98107, 98103, 98199, 98107, 97209, 98199, 98107, 98103

Misc Question Properties  
 Must Answer Question

Apply Scale Input Filters  
 Test  Expand Pattern  Accept All

Password Question  
 No  On Fixed Value  On File of Values

Manual Cleaning  
 None  Review All  Mismatches Only

OK Close Help

<b>Screens</b>	Lists all the screens set for the question, including ones from answer tests and passwords defined during your questionnaire design.
<b>Field</b>	The import file's field which you will be cleaning. "--" indicates there is no field being imported into a question.
<b>Sample of Answers</b>	Shows the first few records in your import file for reference.
<b>Must Answer Question</b>	Rejects the entire record if a response is not received to this question.
<b>Test Import</b>	We strongly recommend testing your import, especially if you're new to the process or working with complex settings. This button makes Survey-Pro to scan your file, and brings up a report indicating any possible problems. See page 157.

### Checkbox and Rating Scales

**Multiple answer checkboxes** For multiple answer checkbox scales, you can specify a minimum or maximum number of boxes which can be selected:

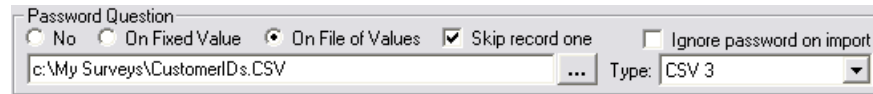
**Scale Value Mapping** Map individual data values to the checkbox labels, such as a,b,c,d to 1,2,3,4. See page 171.

### Written Answer and Pattern Scales

**Single line** When you're using scale 3, Non-repeating or Long Memo Written Answer, the data can contain paragraph breaks. Marking this box restricts the import to a single line instead.

## Password Question

For each import there can be only one password field, whether it's a single value or file. You can use a prepared PIN password file (see page 86) or simply reference a particular column in a CSV file. If you're using the CSV, you can ignore the first record, which is often field names. If for some reason the password was defined elsewhere but you don't want to enforce it on import, mark the **Ignore** option.



## Manual Cleaning

For written answer, pattern, date and number data you can review the answers on import. This can be for all of the answers, or just for ones which fail to match the scale's format. Select your cleaning option, then click Set Corrections to go through the responses for that question.



## Apply Scale Input Filters

In addition, pattern scales can be enforced or loosened to allow data through.



## Batch Import Dialog

*Accessed from the Database menu while in the document editing mode.*

Batch Import is used for importing multiple KeyCollect and DirectCollect files at once. (For NetCollect, use the Get Latest Data command in the Web Survey Setup dialog.) Batch Import automatically matches up import forms and performs all the data cleaning tests from Publish.

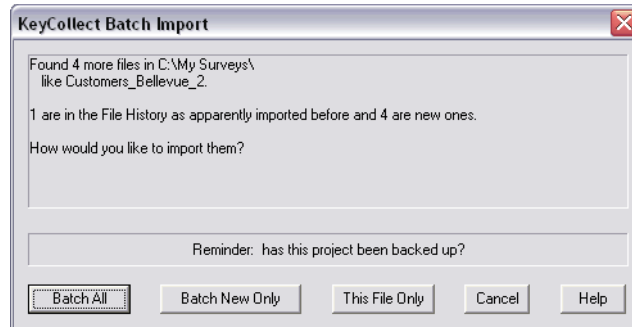
When you select Batch Import, SurveyPro will ask you for the name of one data file. If that file is not a perfect match with the current project, it will redirect you to the regular import dialog (see page 144).

If the file is a perfect match, SurveyPro scans the directory for other compatible files (or in the case of multi-page NetCollect surveys, file sets), and asks which files you would like to import. The import itself is completed using the default settings for that file type, so if you have any concerns, you should review the settings in a manual import first.

As always, be sure you review your log files (see page 157) when finished.

### Scan of data files in folder

The first dialog tells you it found sets, and asks if you'd like to proceed with all files or just the ones it hasn't imported before. Since SurveyPro scans all the files between the first and second dialog, selecting Batch New Only can save time.



#### **Batch All**

Scans all the files found for compatibility problems. You will still have a chance to review the files and un-select ones already imported.

#### **Batch New Only**

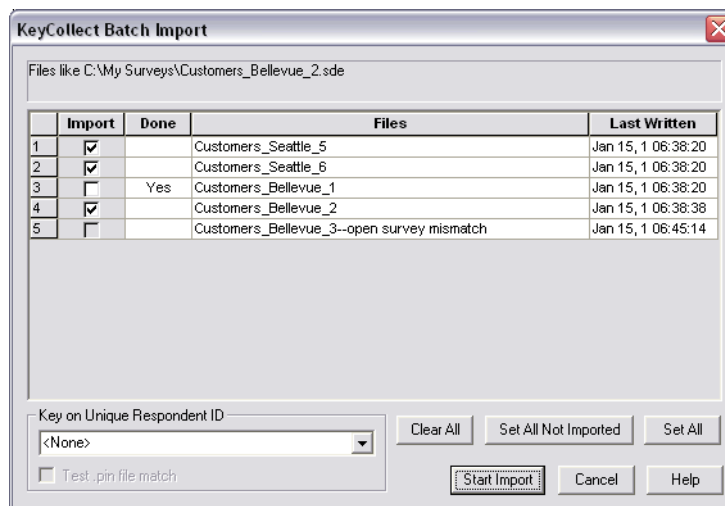
Scans only the files it does not have a record of importing in the logs.

#### **This File Only**

Switches from batch import mode into the standard dialogs.

### Import file list

When you reach the second dialog SurveyPro will indicate which sets have been imported already, and gray out any sets with which it encountered problems.



<b>Files</b>	Lists all file sets found, as well as any problems encountered. In this case, the third file has been imported already, and the last is a mismatch with the questionnaire so it cannot be imported as a batch (but can through regular import).
<b>Key on Unique Respondent ID</b>	If the project uses a unique password, the key will revert to that question—otherwise it will revert to the form's unique ID.
<b>Clear All/Set All Not Imported/Set All</b>	Buttons for selecting file sets. Sets can also be manually selected or unselected by clicking in the first column.

## Import Log Files

*Accessed from the Tools menu, File History dialog.*

Import logs generally serve as a confirmation that the import was performed and a record of which fields went where. Most of the complexity in the example below is due to the keyed aspect, so if you're simply adding forms your log will be quite a bit simpler. A complete description form matchup table is below the annotated version.

To print a record of the log, just copy the contents to the clipboard, and paste into Notepad or a word processor.

Logs are retained in the File History (under the Tools menu) until you remove them. Note that removing logs also removes SurveyPro's memory of what it has already imported.

One of the most important elements to watch for is the mismatches. At least one mismatch in each field usually means you forgot to indicate the first record was field names on the General tab. Other mismatches, such as the state below, can often be fixed in the Data Cleaning tab so the response isn't skipped.

Log of Comma-Separated ASCII Import  
 on file C:\My Surveys\Customer Names.csv Jan 15, 2007 07:04 *Project file and imported file name*  
 into C:\My Surveys\Retail Survey.sp4 Jan 15, 2007 06:45

There was no password test. *Data cleaning settings*

No must answer questions

Indexed imported key Field 3 with open survey file's key Question 26 and found:

11 Import records matched into open survey file

Import Rule Exceptions: *Keyed import settings and results*  
 5 Import keys duplicated, use last record  
 0 Import keys empty or invalid

Open Survey Project File Exceptions:  
 0 Import records matched more than one open survey form  
 335 Import records not matched in open survey file, adds as new form  
 Existing open survey answers will be replaced by import answers

IMPORT FIELD INTO MISMATCHES *Import field number, the question into which it was imported, and the number of mismatches with record number*

2 Q25 [Text] Name 0  
 3 Q26 [Text] E-mail 0  
 4 Q28 [Text] Street 0  
 5 Q29 [Text] City 0  
 6 Q30 [Checkbox] State 1 mismatches (1st @ 190). Reason(s): Not Usable  
 7 Q31 [Text] Zip Code 0  
 1 Q32 [Text] Customer ID 0  
 8 Q33 [DateTime] Last Purchase Date 0

Added unknown forms into D1: Questionnaire *Questionnaire document into which forms were added*

Open survey project file had 88 forms before this import. *Number of forms added to SurveyPro*  
 Import file had 352 records (field names in record 1).  
 Import added 335 new forms.

Table of import records disposition by target form number or reject reason: *Table showing how each import record was matched or added into the SurveyPro database*

	0	1	2	3	4	5	6	7	8	9
		Names	89	90	91	92	DupKey	93	94	95
10	96	97	98	99	100	101	102	103	104	105
20	106	107	108	109	110	111	112	113	114	115
30	116	117	DupKey	118	119	120	121	122	123	124
...										

In the keyed import above, only a few forms were matched to the database, with the majority added as new records. Let's look at the table at the end which lists all the records in your import file. This takes a little practice to read at first. The columns 0-9 indicate the ones digit of record numbers. The rows [blank] to end are the tens and hundreds of your imported record numbers. The four circled records are 1, 3, 6, and 32:

- Record 1 is the field Names in the database
- Record 3 was added to the SurveyPro database as form number 90
- Records 6 and 32 were skipped in the import file because they had the same Key values as records later in the file

Here's the full set of codes which may occur based on your import Key (see page 151) and Data Cleaning (see page 153) settings:



<b>Must</b>	Record rejected as one or more responses did not meet Must Answer requirement(s)
<b>Pwd</b>	Missing valid password
<b>DupKey</b>	Import file contained multiple instances of a key, and based on your key settings (First/Last), this record was not the one used
<b>NoKey</b>	Record was missing a key, and your settings were Skip rather than Add New
<b>NoFind</b>	SP3 file did not contain a matching key, and your settings were Skip rather than Add New
<b>DupUid</b>	Import record contained a unique Form ID which already existed in your project, and your settings were Skip rather than Create New
<b>NoUid</b>	Import record was missing a unique Form ID, and your key settings were Skip rather than Add
<sup>1</sup>	Superscript next to the form number, indicates the record was added with a new Form ID
<sup>2</sup>	Superscript next to the form number, indicates an existing Form ID was replaced by the import record's Form ID
<b>Names</b>	Appears only for record 1, indicating it contained field names instead of data
<b>Void</b>	Keyed import on form number, attempting to merge into a form which has been voided (meaning the data is gone, and only a form number placeholder is left)

## Export Dialog

Accessed from the Database menu while in document editing mode.

Export is a very straightforward function in SurveyPro, with compatible file formats listed on page 142.

For any export to a file (not SQL), you will specify the:

1. File type
2. File name and location
3. A previously created export map, and/or details of the file format and forms to be included:  
SurveyPro ST3/STL/SDE on page 160

Comma/Tab Delimited ASCII on page 162

MS Access MDB on page 163

SQL on page 165

4. Questions to export in the Field Selection Tab on page 164
5. If SQL, merge options for adding information to your database on page 167
6. Name for the export map you've just created (if you're going to repeat the process)

### Log files

At the end of every export you will see a log file with detailed information about the file created, and forms and fields exported. This is an excellent reference for matching the data file into the application which will be using it. Logs are stored in the Tools menu, File History dialog for later reference. See page 168.

## General Tab for SurveyPro ST3, STL and SDE

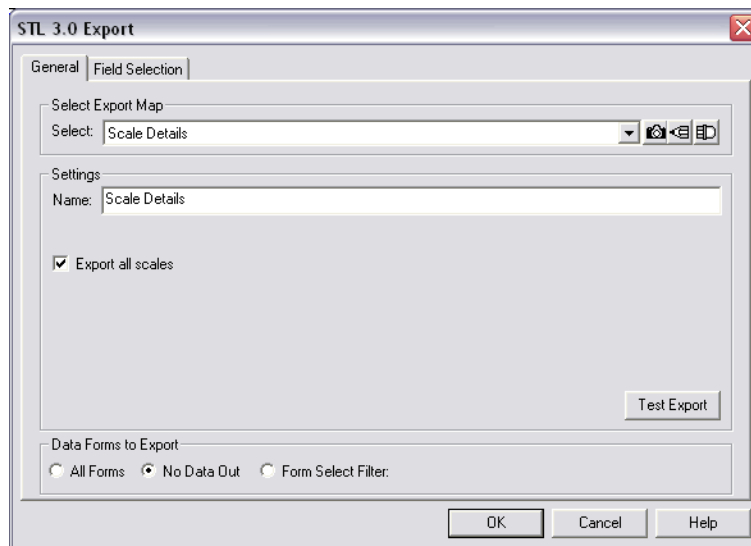
*Accessed from the Database menu while in document editing mode.*

The controls for Survey Tag Language 2.0 (STL) and 3.0 (ST3), as well as KeyCollect SDE data files are identical, so all three are documented here.

A great way to make a template is to export an ST3 file with all scales and no data, then you can open that in SurveyPro when you need to start a new file.

If you use ST3 Export as a template when using Remark 5.1 for scanning, it saves you the trouble of setting up a template in Remark question by question.

See also the *Field Selection Tab* on page 164.

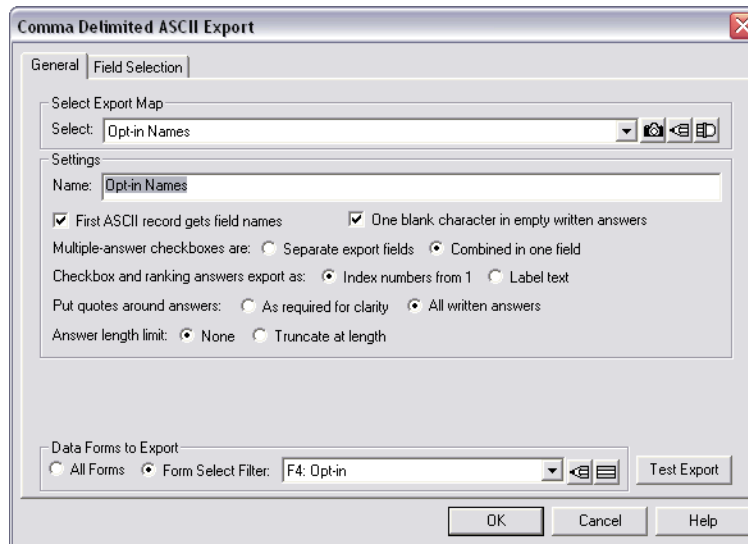


- Scale Export Map/Name** All the settings in both the General and Field Selection tabs can be saved as Export Maps. Maps are linked to the file type for future use. If you want to save your settings as an Export Map, type a name for your reference.
- Export all scales (ST3/STL only)** Exports all scales in the file, not just the ones used by the questions you're exporting. This is very useful for creating templates.
- Data Forms to Export** Depending on the file type you will have an option of all forms, no forms, or a sub-set determined by a Form Select Filter (see page 213).

## General Tab for Comma/Tab Delimited ASCII

Comma and tab delimited ASCII files are identical except for the delimiter, so both are documented here.

See also the *Field Selection Tab* on page 164.



- Scale Export Map/Name** All the settings in both the General and Field Selection tabs can be saved as Export Maps. Maps are linked to the file type for future use. If you want to save your settings as an Export Map, type a name for your reference.
- First ASCII record gets field names** Adds the field names as the first record in the data file. If the importing application supports this, including the names helps prevent mismatches.
- One blank character in empty written answers** Some applications prefer a placeholder, such as a single space, be added to empty fields.
- Multiple-answer checkboxes** There is no standard data file format for multiple answer fields, so you can export them as either a single field such as “,3;7;12,” or separate fields “, , ,1, , , ,1, , , , ,1,”. If you are uncertain what format your software prefers, separate fields is generally the safer choice.
- Checkbox and ranking answers** You can export either the checkbox number or the label used in Survey-Pro. Note this is the automatic number, not a custom value you may have added.
- Put quotes around answers** Within ASCII data files double quotes " indicate that the following text is to be taken verbatim, and that special characters such as commas or line breaks should be disregarded until the closing " is encountered. Although some applications only enclose data in quotes when it contains one of

these special characters, we recommend doing so for all written fields. Any quotes within a response will be doubled, becoming "".

**Answer length limit**

Allows you to truncate the length of written answers.

**Data Forms to Export**

Export all forms or a sub-set determined by a Form Select Filter (see page 213).

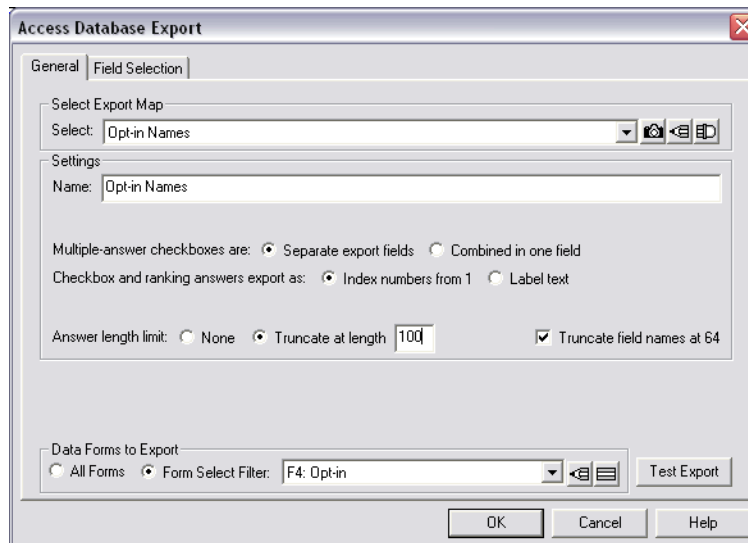
## General Tab for Microsoft Access MDB

*Accessed from the Database menu while in document editing mode.*

Microsoft Access MDB files can be a great way to transfer data among applications which support the format. This is also the most common approach for interfacing with ODBC databases.

When SurveyPro exports data to MDB, it creates a new single-table database with your responses.

See also the *Field Selection Tab* on page 164.

**Scale Export Map/Name**

All the settings in both the General and Field Selection tabs can be saved as Export Maps. Maps are linked to the file type for future use. If you want to save your settings as an Export Map, type a name for your reference.

**Multiple-answer checkboxes**

There is no standard data file format for multiple answer fields, so you can export them as either a single field such as “,3;7;12,” or separate fields “, , ,1, , , ,1, , , , ,1,”. If you are uncertain what format your software prefers, separate fields is generally the safer choice.

**Checkbox and ranking answers**

You can export either the checkbox number or the label used in Survey-Pro. Note this is the automatic number, not a custom value you may have added.

**Answer length limit**

Allows you to truncate the length of written answers.

**Truncate field names at 64**

Truncates the field names in the table at 64 characters. This is usually only an issue if you select the Question Report Labels as the field names to export on the Field Selection tab (see page 164).

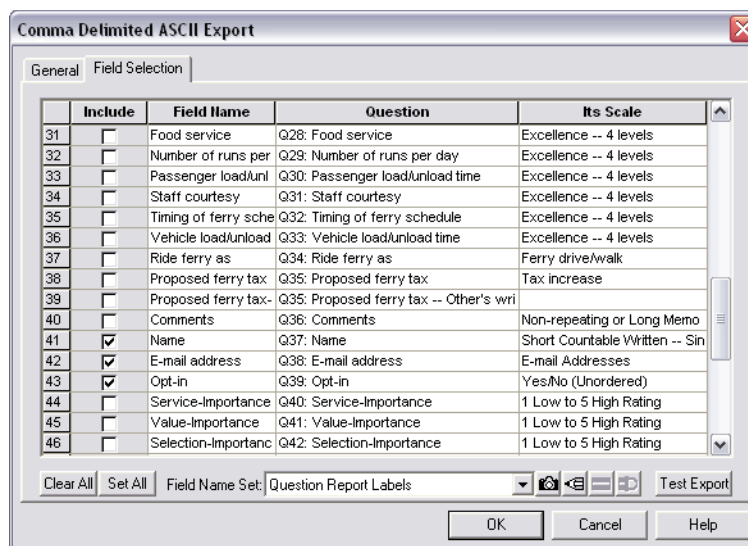
**Data Forms to Export**

Export all forms or a sub-set determined by a Form Select Filter (see page 213).

## Field Selection Tab

All the file formats except SQL use this screen to mark the questions you want to include in your export.

Note: If the question names do not seem to match the questionnaire, it is because their Report Labels need to be updated. See page 248.



**Include**

Selects the fields to export. At the end of the list are system fields such as the date and time a record was submitted online, or form number.

**Clear All/Set All**

Use these buttons to mark or clear all fields.

**Field Name Set**

When you export the field names as the first record, you can select the names you'd like to use or add a custom set. See page 170.

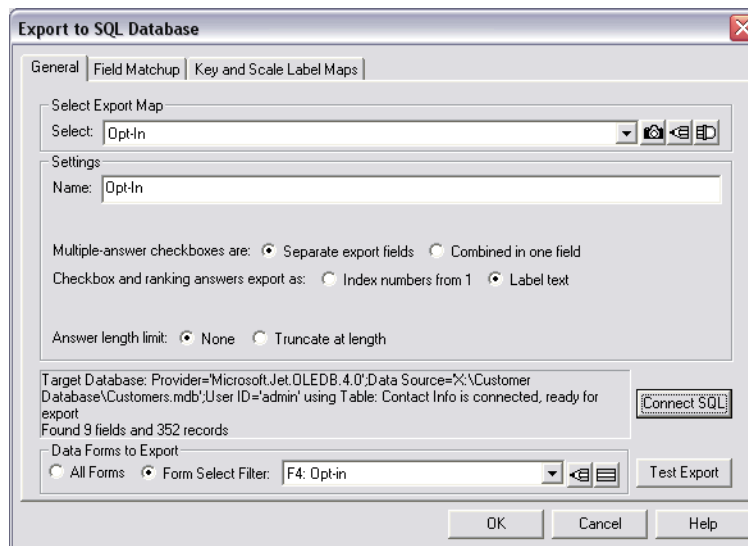
**Test Export**

If you're uncertain of your settings, the Test Export button is a quick check to ensure everything is fine. It produces a report similar to the log you'll see on a completed export (see page 168).

**General Tab for SQL Databases**

*Accessed from the Database menu while in document editing mode.*

SQL exports are slightly different from the others because instead of creating a new data file, they add information to an existing database. It uses a Field Matchup tab on page 166 which is similar to imports, as well as a Key tab on page 167 to specify how to handle overwriting information.

**Scale Export Map/Name**

All the settings in both the General and Field Selection tabs can be saved as Export Maps. Maps are linked to the file type for future use. If you want to save your settings as an Export Map, type a name for your reference.

**Multiple-answer checkboxes**

There is no standard data file format for multiple answer fields, so you can export them as either a single field such as “,3;7;12,” or separate fields “, , ,1, , , ,1, , , , ,1,”. If you are uncertain what format your software prefers, separate fields is generally the safer choice.

**Checkbox and ranking answers**

You can export either the checkbox number or the label used in Survey-Pro. Note this is the automatic number, not a custom value you may have added.

**Answer length limit**

Allows you to truncate the length of written answers.

**Connect SQL**

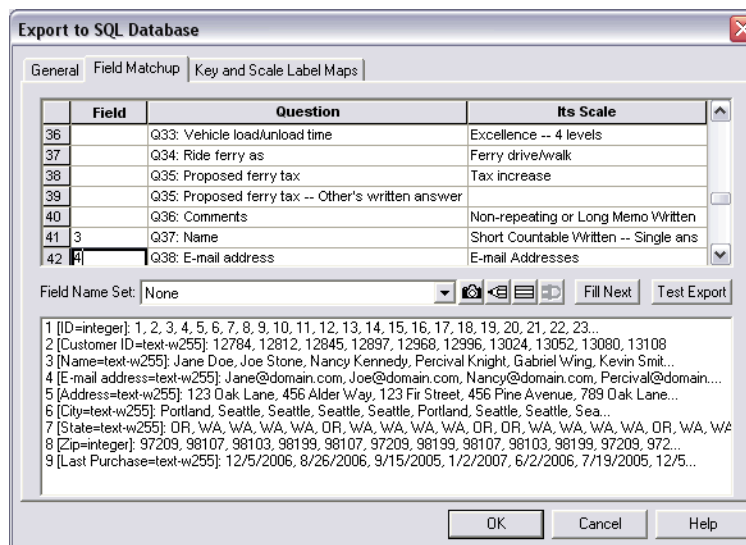
Click the Connect SQL button to connect to create a new export connection. Or, to use a previously defined setup, select an export map and then click this button to connect. See page 169.

**Data Forms to Export**

Export all forms or a sub-set determined by a Form Select Filter (see page 213).

**Field Matchup Tab for SQL Databases**

Use this screen to link the export file's fields to the correct questions in the file. Click in the field column and type the field number you see in the peek window at the bottom of the screen. If your export file's field numbers (or a subset) are in the same order as the SurveyPro questions, you can use the Fill Next button to set field matchups after the first.

**Field**

Type the field number which matches the question, or type the first in a series and use the Fill Next button to enter the rest.

**Question/Scale**

Questions and scales in the file. This is the master list, not just the contents of a single questionnaire.

**Fill Next**

Fill Next increments field matchups for quick setup when your import file's fields are in the same order as the SurveyPro file's questions.

**Test Export**

If you're uncertain of your settings, the Test Export button is a quick check to ensure everything is fine. It produces a report similar to the Log you'll see on a completed export.



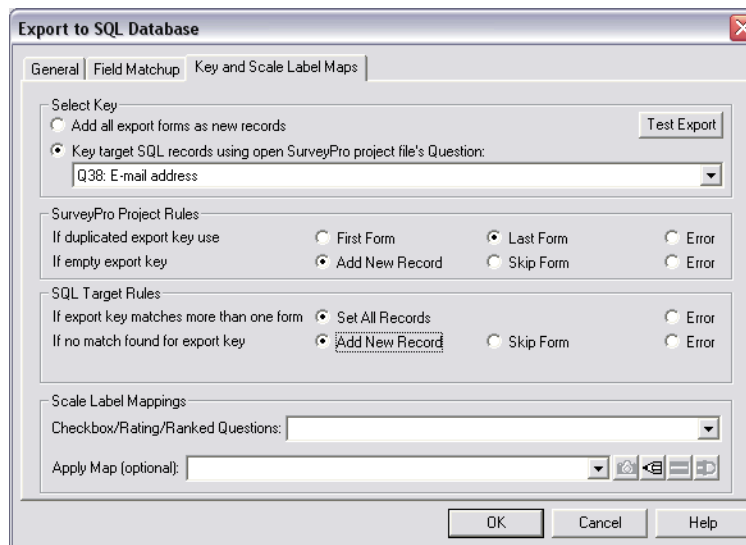
**Field Name Set** Because SQL databases tend to have their own field naming conventions, Field Name Set field is not typically used for SQL export. However, when needed you can select an automatic set or create a new one (see page 170).

**Preview Window** The lower half of the dialog shows the first few records of your database.

## Key and Scale Label Maps Tab for SQL Databases

Use this screen to fine tune information about database keys, export rules, and scale mapping.

Important: SQL databases have their own rules for adding fields, such as requiring unique values or prohibiting NULL (empty) values. Be sure your export rules here are consistent with the SQL rules. Otherwise, the export is likely to fail and you may receive cryptic error messages from the SQL system.



**Select Key** Often you'll be merging information into existing records. A Key question is used to match up forms in the import file to those in the existing database.

**If duplicated export key use** If your SurveyPro file contains more than one instance of a key, do you want the export to update your SQL database with the first instance, last instance, or stop with an error?

**If empty export key** If your SurveyPro file contains forms with no key entered, do you want them to be added as new records to your SQL database, skipped, or to halt the whole export with an error?

- If export key matches more than one form** If the database to which you are exporting contains more than one instance of a key, then would you like SurveyPro to update all instances or stop and produce an error?
  
- If no match found for export key** One of the key values in your SurveyPro file does not exist in the SQL database. Would you like a new form added, the export form skipped, or an error?
  
- Replace an existing answer** Among the fields being exported, data may already exist in the SQL database. If so, would you like this replaced with the SurveyPro file's data, only replaced if it's not a blank field, or never replaced?
  
- Scale Label Mappings** Scale Label Mappings lets you to override what is exported for specific scales to match what the SQL database expects. See page 171.

## Export Log Files

*Accessed from the Tools menu, File History dialog.*

Export logs generally serve as a confirmation that the export was performed and a record of any form or field sub-sets. They are invaluable when you don't export first record labels, or when you'll be passing the data file to another person.

To print a record of the log or e-mail to another person, just copy the contents to the clipboard, and paste into Notepad or a word processor.

Logs are retained in the File History until you remove them.

Log of Comma-Separated ASCII Export  
of file C:\My Surveys\Jan Opt-in.csv  
written at Jan 11, 2007 13:08  
from project C:\My Surveys\Commuter Survey.sp4  
last saved at Jan 11, 2007 13:05

*Data file created and project file name*

Form Select = Opt-in [ Q39 = 1 ]

*Indicates whether all forms were exported or a Form Select sub-set*

Export option settings:

Answer widths unlimited.  
Record one has field names.  
Blank written answers will have a space character.  
All written answers will be enclosed in quotes.  
Multiple-answer checkboxes will be output in one field with semicolon delimiters.  
Checkbox and Ranking answers will be output as box numbers.

*Formatting options—depends on file type exported*

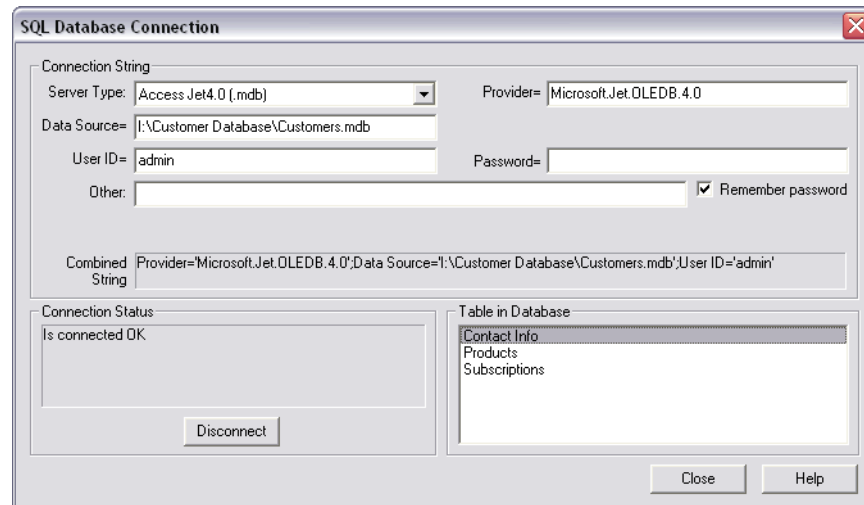
FIELD	NAME	CONTENTS	<i>Field number in the export file, name of the field, and the contents including Q number, scale type and internal question name</i>
1	Form Number	Form Number	
2	Name	Q37: [Written] Name	
3	E-mail address	Q38: [Written] E-mail address	
4	Opt-in	Q39: [Checkbox] Opt-in	

Output 51 records. *Total number of forms in the exported file*

## SQL Connection Dialog

*Accessed from the General tab of SQL Imports and Exports.*

Whether you are importing or exporting to a SQL database, when you click the Connect SQL button, you'll arrive at this dialog. You must connect to the database before you can test an import, or proceed with the import or export.



### Connection String

Choose a server type from the list. Your choice affects the other connection options that appear. SQL Server, MySQL, Oracle, and Oracle From Microsoft let you connect to those SQL server products. Access Jet lets you go to a MDB file. Data Link Files lets you use a predefined connection referenced by name. DSN lets you use an ODBC registered name. <Custom> offers the same entries as SQL Server but without the server name pre-loaded.

### Connection Status

Click to connect to the database. When connected, this button is renamed to Disconnect.

### Table in Database

After connecting to the database, select the database table you want to use. If there is only one, it is selected automatically. SurveyPro can only exchange data with one table at a time.

### Close

After connecting to the database and selecting a table, click Close to return to the import or export process.

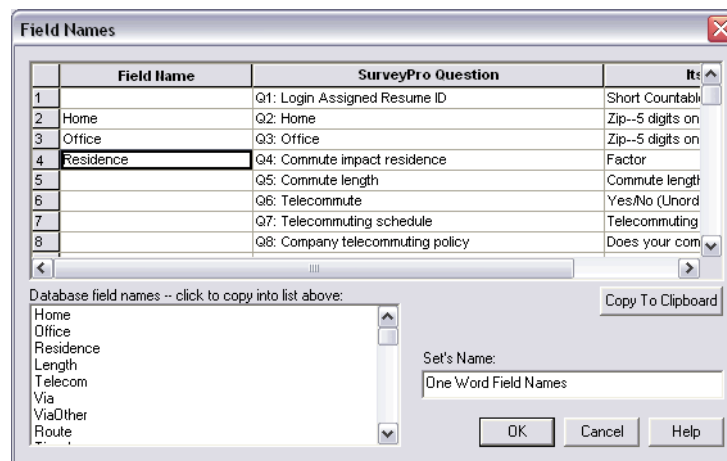
## Field Name Sets

*Accessed through the Field Matchup Tab on page 149 during imports or the Field Selection Tab on page 164 during exports.*

Use Field Name sets to match your data file's or database's field names to the SurveyPro question labels.

To match a field name, click in the first column, then click on a field name in the bottom left list.

Note: If the question names do not seem to match the questionnaire, it is because their Report Labels need to be updated. See page 248.



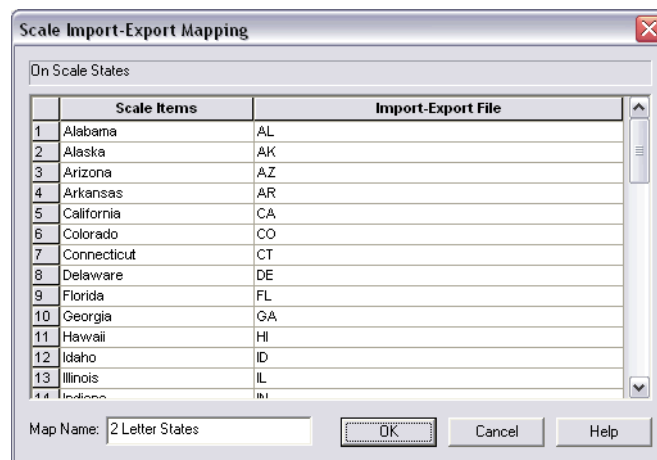
- Field Name** Lists the names currently associated with questions.
- SurveyPro Question/Its Scale** Questions and scales in the file. This is the master list, not just the contents of a single questionnaire.
- Database field names** Field names used in the file you are in the process of importing.
- Copy to Clipboard** Copies the field name, question ID and scale matchups to the clipboard. They can be pasted into a text editor, word processor, or spreadsheet.
- Set's Name** Copies the field name, question ID and scale matchups to the clipboard. They can be pasted into a text editor, word processor, or spreadsheet.

## Scale Value Mapping for Import and Export

*Accessed through the Data Cleaning screen during imports.*

While you select a checkbox question in the Data Cleaning screen during import, you'll see a control labeled Scale Mapping. What this control lets you do is select or create a scale mapping that translates SurveyPro's scale box values into the answers to be read from or written to your external sources.

To map multiple values into one scale item, separate them with semicolons “;”.



- To create a scale mapping:**
1. Select the question you want to map on the Data Cleaning tab
  2. Insert a mapping
  3. Type the value which is used in your ASCII file or SQL database next to every scale item (rows left blank will not save an answer)
  4. Give the map a Name and click **OK** to save

As with all named objects in SurveyPro, once a scale map is created you can apply it to other questions with the same scale. However, remember that any changes will also ripple to all uses, so if you're using a mapping that was defined by someone else for an import or NetCollect piping, you may want to duplicate the mapping before editing.

The basics of importing forms is straightforward, but there are many flavors of data files and possible combinations, so SurveyPro includes a large number of controls in its Import dialogs.

While the Collect programs take care of most of the matchup and merging for you (especially with batch import), if a file isn't a perfect match, you'll be using these same controls.

See *Database Fundamentals* on page 111 and *Import/Export Fundamentals* on page 142 for definitions of database terms.

In this tutorial you'll learn how to:

- Importing new forms into SurveyPro.
- Saving settings in an Import Map.
- Merging information into existing database forms (keyed import).
- Screening for incorrect responses.

### Tutorial Notes

**General** You can save your file and take a break any time you're in the main document screen.

**Tutorial Files** Are in your **SurveyPro Samples** folder, by default under:  
C:\Program Files\Apian Software\SurveyPro 40\

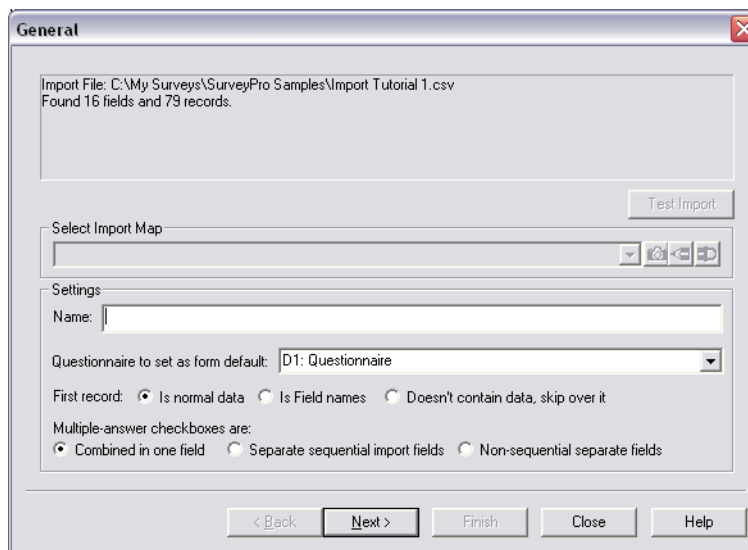
1. Start SurveyPro, log in, and if the window isn't filling the screen, maximize it.
2. **File, Open Import Tutorial.SP4** and save as **YourName Import Tutorial.SP4** when prompted. **Close** File History.

This is a modified version of the survey created in *Creating a Questionnaire* on page 91. The original questionnaire asked respondents for their room service check number, and for those who provided it, we'll be able to merge information from the hotel's invoicing system with the respondent data. So, the original questionnaire was copied into a new version, "D5: Data Entry Version," and a few fields were added to a second page for the invoicing data. All entry and import will be into this questionnaire document.

## Selecting the file and format

The files we're working with are comma delimited ASCII, also known as comma separated values (CSV). These are the most common data file imported apart from the Collect files.

1. Under the **Database** menu, select **Import from, Comma Delimited ASCII**.
2. Select **Import Tutorial 1.CSV** and click **OK**.



Before SurveyPro even brought this dialog up, it scanned your file for possible errors and reported what it found in the top panel.

3. In the first active field, give your settings the **Name** Ratings.

While this setting has little meaning for a one-time lesson import, it's extremely handy for real projects. SurveyPro will save all settings we're about to make under this name, so next time you import a file from the same source, all you would have to do is select the Import Map and click Finish.

4. Change the **Questionnaire** setting to **D5: Data Entry Version**.

- This file's first row does contain field names, so click the radio button for **First Record: Is Field names.**

The next setting relates to multiple-answer checkbox scales, which do not have a universal formatting in data files. The first option, combined, would mean there was a single field indicating the boxes marked, such as "1;2;5," while the separate fields uses a separate field for each box with a 1/0 or Yes/No switch such as "1,1,0,0,1."

- Set the **Multiple-answer** control to **Separate sequential import fields** and click **Next**.
- Click **OK** to close the warning dialog.

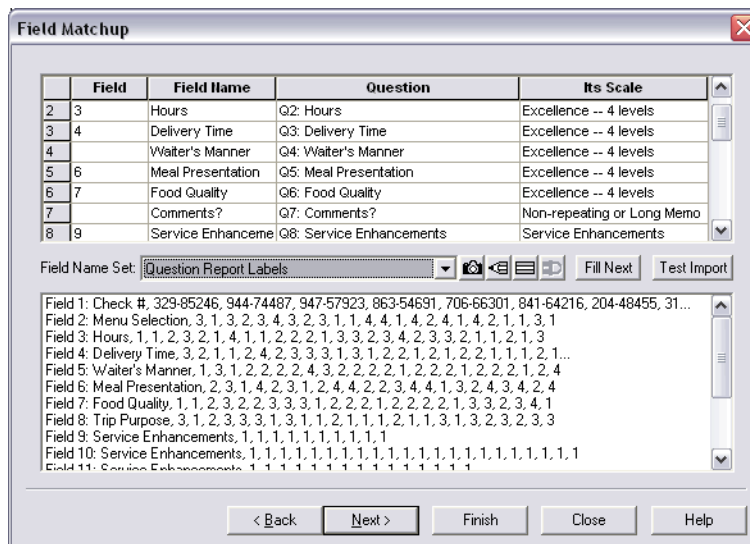
### Matching import fields to questions

The Field Matchup screen is just that—connecting fields from the data file into your SurveyPro questions.

At the top is a list of the SurveyPro questions in Q order. At the bottom is a list of the fields in the file you're importing. Next to each field number is a peek at the first few forms in the file, to help you match the right data to the right question.

Between the two is a control which is a real timesaver, and we're about to use it to have SurveyPro match our fields for us.

- In the middle of the dialog, change the **Field Name Set** to **Question Report Labels**.





Because the field names in the imported file are identical to the report labels, SurveyPro entered the field numbers in the first column for us. SurveyPro has several built-in field name sets, but you can also add custom sets to match existing databases.

2. It's always a good idea to double-check automatic settings, so scroll down the top list, comparing the field number in its first column against the data in the lower window.

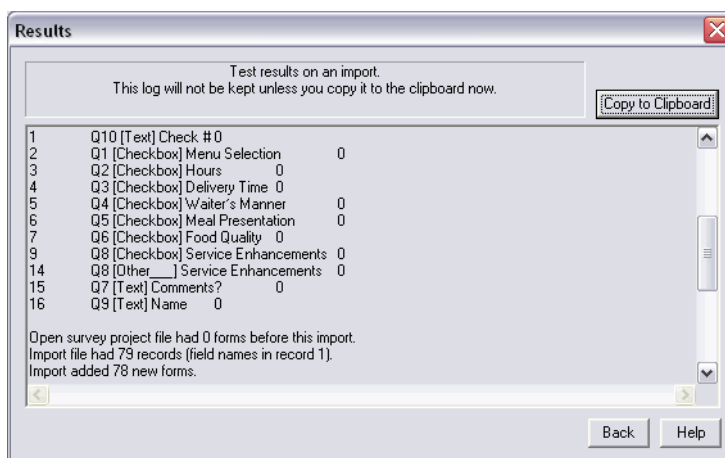
Questions 4 and 7 didn't match up because of different punctuation in the SurveyPro and import file labels.

3. Click in the **Field** column next to **Q4: Waiter's Manner** and type a 5 to match it to the fifth import field.
4. Type 15 next to **Q7: Comments?**

Note that Q8: Service Enhancements only has one field number, 9, even though the peek shows several fields with that label. This is the multiple answer question, and since it has 5 boxes, SurveyPro automatically looks to 9 and the following 4 fields.

Q8: Service Enhancements also has two rows in the upper list, the second with "Other" after the Question name. This checkbox scale had a write-in blank, which is a different database field in SurveyPro. It also wasn't matched by the Field Name Set, so we'll need to fill it in.

5. In the **Field** column for **Q8: Service Enhancements Other**, type 14 to match it to the field number labeled "Other" in the lower list.
6. The remaining empty fields will be filled in with our second import, so click the **Test Import** button to see whether we have any errors so far.



It's always best to correct problem files or incorrect settings before import, so clicking Test Import and reviewing the test log is worth a few moments. It's also better to learn about problems from the import log than an "off" report, so be sure you check the final log even on routine imports. Import logs are saved for your review in the Tools, File History dialog, and the Help system includes detailed information about their contents.

7. In this case, no mismatches show mid-way down the log, so click **Back** to close the log screen.
8. Click **Next** to go to the Key tab.

Keyed import merges information from the imported file into existing forms in your database. For right now, we're just adding forms, but the second import in this lesson merges information based on the Check #.


9. Click **Next** to see the Data Cleaning tab, which we don't need to use since we have no mismatches.
10. Click **Finish, Yes** at the prompt to save the map, and **OK** to close the log file.
11. Click on the **2: Executive S...** document tab at the bottom of the screen for the automatic Executive Summary report.

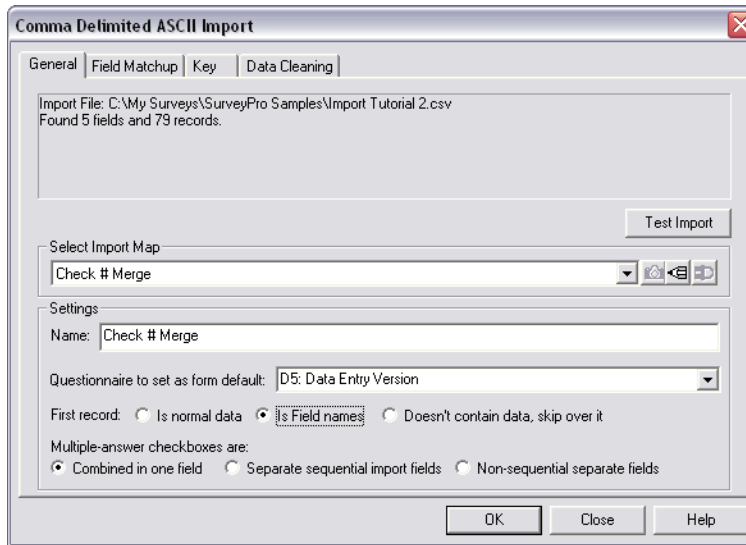
We have data in all the questions the guests answered. The remaining fields are ones we're going to fill in based on the Check #.

### Matching forms for a second import

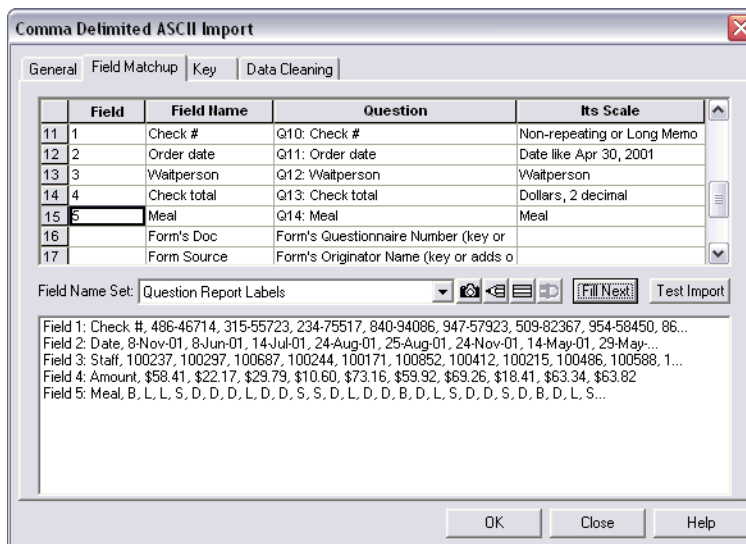
1. Go to the **Database** menu, and select **Import, Comma Delimited ASCII** again.
2. Select **Import Tutorial 2.CSV**.

This time the dialog looks different, with tabs instead of a wizard, because SurveyPro brought up the settings for the Ratings import map we just created.

3. The first control is a drop-down list asking for the **Import Map** to use. In this case we need a new one, so click the Insert button  next to the list.
4. If you're prompted to save changes to Ratings, click **No**.
5. Click in the **Name** field and type Check # Merge.
6. Again, click in the list below to change the **Questionnaire** drop-down list to **D5: Data Entry Version**.
7. Set the **First Record** to **Is Field Names** again, and check your screen against the one below.



8. Click on the **Field Matchup** tab at the top of the dialog.
9. In the middle of the dialog, change the **Field Name Set** to **Question Report Labels** again.
10. Scroll down the question list until **Q10: Check #** is at the top.
11. In this case, only two field names matched SurveyPro's, so click in the **Field** column next to **Q11** and click the **Fill Next** button.
12. Click **Fill Next** twice more to set the next two questions.



## Setting the import to update records instead of add

1. Click on the **Key** tab at the top of the dialog.

Now things are going to get interesting, since the next step is to match the information in this data file to the records already in the SurveyPro database. Keyed import has a somewhat confusing array of controls because the scenarios for merging data are so different. For your own projects, you may want to try a test run with a temporary file until you're sure it's doing exactly what you want.

2. Select the radio button for **Key import records**.
3. From the drop-down list that appeared under the radio, select **Q10: Check #**.

The drop-down list only displays questions into which data is being imported. An "ideal" keyed scenario is a 1:1 relationship between records in the existing data and the imported file, but those rarely exist. Most of the controls in this dialog are for dealing with exceptions.

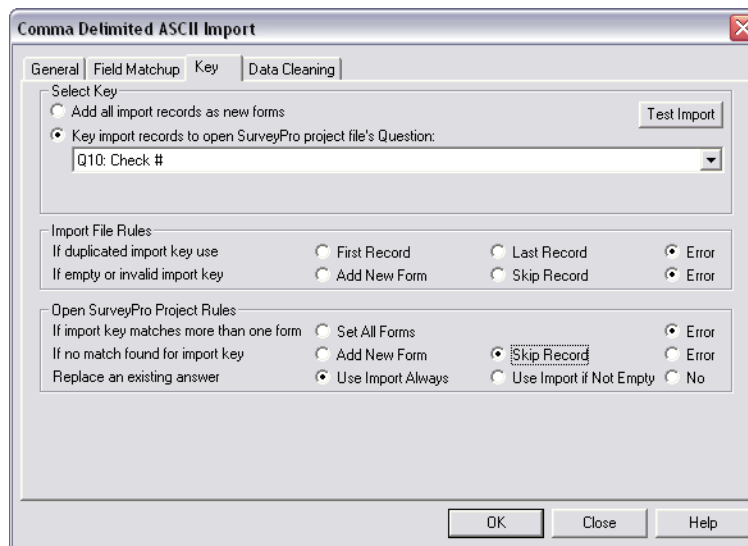
In the next set of controls are settings for exceptions in the CSV file we're importing. Because this data file originated in an invoicing system, every record should have a check number and there should be no repeats. If there are any problems, we want to know about it before importing.

4. For both **Import File Rules**, change the settings to **Error**.

The Error setting in keyed imports stops the import, produces a warning dialog, and will not let you proceed until the key settings and/or data file are corrected to eliminate all errors. Generally this setting is only used when the file should produce absolutely no errors, so getting one means the file is corrupted in some manner.

Next in the dialog are controls for exceptions in the existing SurveyPro data. Again, we need to make a change for this particular scenario, where many forms in the SurveyPro database don't contain a key value (it was an optional question), and the import file is a super-set of the responses (not everyone answered the survey).

5. Change **If no match found** for import key to **Skip Record**, since we don't want to add forms for which we have no feedback.
6. Check your screen against these settings, and then click **Test Import**.



As you read through the log, note that it matched up only 30 records and skipped 48, and that it encountered mismatches for the Meal question. If you remember from the peek on the Field Matchup tab, it was encoded as “B,L,D,S” while the SurveyPro scale is “Breakfast, Lunch, Dinner, Late Night Snack.” Since the “L” in the import file could be applied to both the second and fourth checkboxes and “S” doesn’t match the first letter of any labels, SurveyPro reported them as mismatches. Don’t worry, the next step is to fix it!


At the end of the log, instead of the solid grid of numbers which you saw in the first matchup, there are numbers interspersed with “NoFind,” which indicates the import file records for which it couldn’t find a match in the SurveyPro database.

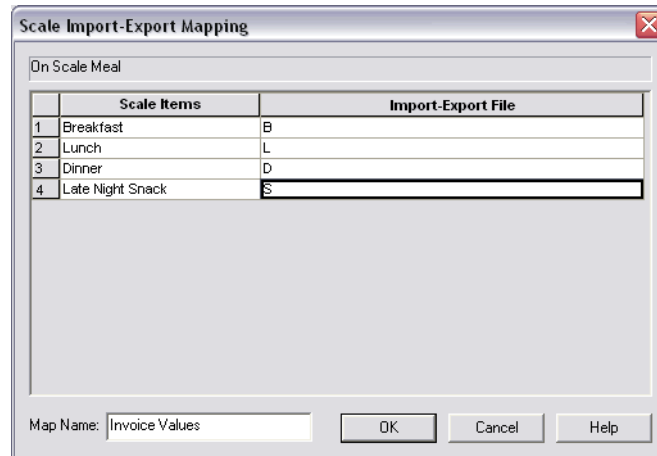
7. Click **Back** to close the log.

## Mapping import data to scale values

1. At the top of the dialog, click the **Data Cleaning** tab.
2. Scroll down to the end and note that the Key setting is indicated in the first column for Q10.
3. Click on **Q14: Meal** in the center column of the last row.

Notice that just below the question list a sample of the import data appeared. Now you don’t need to jump back to the Field Matchup tab for a peek at the values we need to fix.

4. Click the Insert button  next to the **Scale Value Mapping** drop-down list (you can have several sets for different sources).
5. In the **Import-Export file** column, type B, L, D and S next to Breakfast, Lunch, Dinner and Late Night Snack respectively.
6. Click in the **Map Name** field and type Invoice Values.



7. Click **OK**, and note that Sv1 has appeared next to Q14 in the Data Cleaning question list.
8. Click **Test Import**, confirm the mismatches are gone, and click **Back** to close the log.
9. Click **OK** to finish the import, and **Yes** to save your import map settings for future use.
10. Click **OK** to close the final log, and notice all the questions in the Executive Summary now have data!

In most cases, you'll need to become familiar with only a few of the import controls because you'll be importing data from only a few sources.

Even if you never manually enter data, you may want to take a look at *Working in Answer Entry* on page 132, so you can learn how to find and edit individual responses.







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## Understanding Report Elements in SurveyPro

SurveyPro creates report documents which are structured of tiles just like surveys, but instead of question tiles it uses figures. A figure can be a table, or bar chart, or pie, and can change as needed. *Using Figures Effectively* on page 185 is an excellent place to start if you are new to analysis.

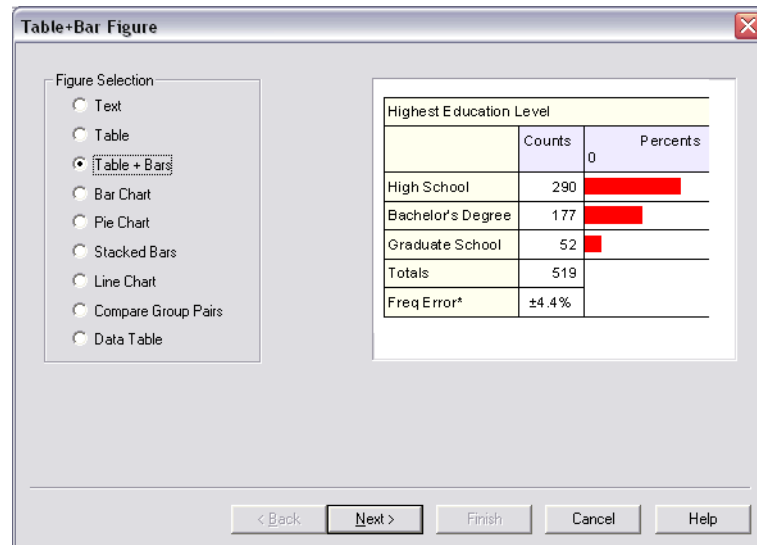
Again, just as questionnaires reference Text Styles and Scales in their definitions, figures reference an assortment of components which enrich and streamline your analysis. The components are referenced throughout this chapter, and used in *Creating a Report* on page 253 and *Breaking Data Down* on page 268, but their specific coverage begins on page 210.

SurveyPro's reporting engine is designed to be used from a novice to expert level, with automatic reports you can print as-is, to an array of options for fine-tuned analysis.

**Note:** If the figure dialogs and reporting tools don't offer you a statistic or function you expect, double-check your questionnaire definition. For example, if on your survey you asked a date question but used a written answer scale, the reporting will not give you the option to group dates by days, months, etc.

## Using Figures Effectively

You're constructing a custom report, you click the Insert button, and a list of nine figure types drops down. Not only do the different figure types provide different visual representations, they also report on different types of questions and work with different sets of statistics. So which to choose?



The best way to discover the pros and cons of different figures, as well as your personal preferences, is to experiment with your own projects. *Creating a Report* on page 253 walks through many of these figure types, but you can also insert a bar chart, change it to a table, modify the statistics, change it to a pie chart, and so on. When you finish playing with test figures, clean them up for use in your final report or simply delete them.

In general, the figures do have certain strengths and weaknesses though, which we've described here. All figure types have some common dialog elements which are covered beginning on page 187. Each figure dialog will offer the statistics applicable to that format (many more in tables than pies), and which are allowed for the selected questions' scales—see *Statistics in SurveyPro* on page 207.

### Text

Text figures are minimally formatted, so while they can be used to report on a wide range of statistics, they are normally used to analyze written answer scales. Written responses can be reported for the entire database or a sub-set of respondents, and may also be crosstabbed (broken down) by another question. See page 193.

## Table

Tables may be used when you need to pack a page with many statistics, questions, and crosstabs, but can also make effective presentations of smaller amounts of numeric data. If a table appears awkwardly long or wide, try tinkering with the layout settings to create a more balanced look. See page 193.

## Table + Bars

The default for Executive Summaries, Table + Bars combine numeric data with a visual representation. In this case, the table displays counts, while the bars show percents. See page 194.

## Bar Chart

Bar Charts are the classic graphs, excellent for reporting frequencies in a question, or even means for items in a question group (see page 228). They are not very effective for crosstabs, where they produce a figure for each breakdown, so for that type of analysis you may want to try a Stacked Bar figure. See page 195.

## Pie Chart

Pie Charts are a popular figure type, but tend to be limited in their applications. If you use a pie, take a look at the sorting function and rescales to simplify the chart, and 3D styles to maximize the impact. As with bar charts, crosstabs can become difficult to compare with pie charts, so you may want to consider a stacked bar or other figure. See page 196.

## Stacked Bars

A Stacked Bar is like a pie chart in that it contains slices for each response in the frequency distribution, but its strength is that you can stack these slices up for a quick visual comparison. See page 198.

## Line Chart

Line or profile charts are similar to stacked bars in that they present results for different groups in a concise visual format. See page 199.

## Compare Groups Pairs

Compare Groups figures can take several forms: bar charts, scatterplots, or line charts. In all cases, the figure is about comparing the results for two question groups or two customer segments on one question group, and only the layout changes. See page 201.

## Data Table

In addition to the Data Table report, individual data tables may be inserted into custom reports. One very effective use for these figures is to report on one group of customers for whom you want a more complete profile. For example, you can create a figure with a few key questions and a Form Select of records containing comments. See page 204.

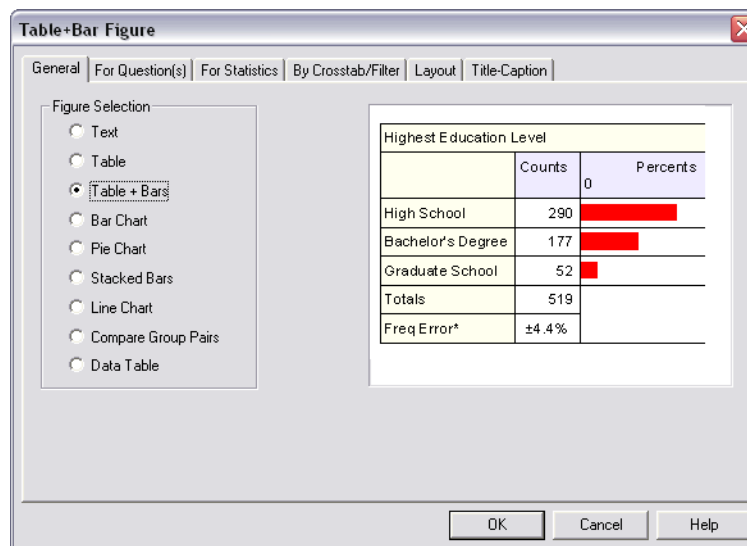
## Figure Dialogs

Figures act just like questions, added with the Insert pencil point and assembled in a document as tiles. Also like questions, when you initially insert a figure it will be in “wizard” mode stepping you through the tabs, but on editing all the controls will be available.

Many of the figure controls are used repeatedly in the dialogs, so start first with the following sections on the tabs. Then see the individual figure types for additional details.

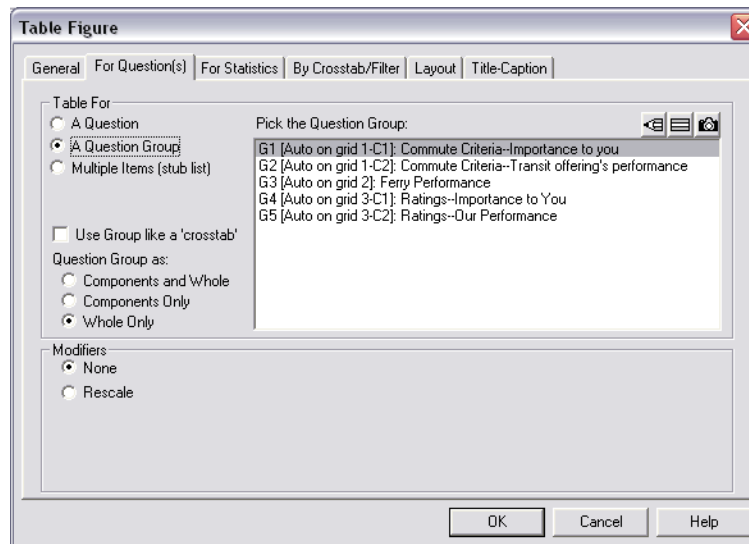
## General Tab

You’ll skip this tab when you use the pencil point to insert a specific figure type. After a figure is defined, you can change a tile to another figure type, but this can lose some layout and statistics settings so you may want to experiment on a copy.



## For Question(s) Tab

Select a question or group of questions as the primary elements in the figure. This tab is almost identical for every figure type except the Line Chart, which is covered on page 199.



### Table For

The figure can be for a single question, a question group, or a set of questions known as a stub list. See *Question Groups & Scores* on page 228 and *Stub List Dialog* on page 206.

### Pick the Question/Group/Stub Item

For questions, this displays the complete list within your project. For Groups, it lists the existing groups and has Insert, Modify, and Duplicate buttons for adding new groups. For Stubs, it lists the items in the stub list you've created, and as you click on each item in the list you can selectively apply modifiers, or click Apply To All to set them at once.

### Question Group as

Groups can be presented as a single unit, showing each question within the group, or both. The best choice usually depends on the type of figure and whether you're using a cross-tab. Try experimenting with all the settings to see how they appear.

### Modifiers

You can apply an optional Rescale to change the labels, grouping or structure of the selected question(s). With date and number scales you'll also see options for quick binning into common categories, and written answers are autopostcoded. See *Modifiers & Rescales* on page 216.

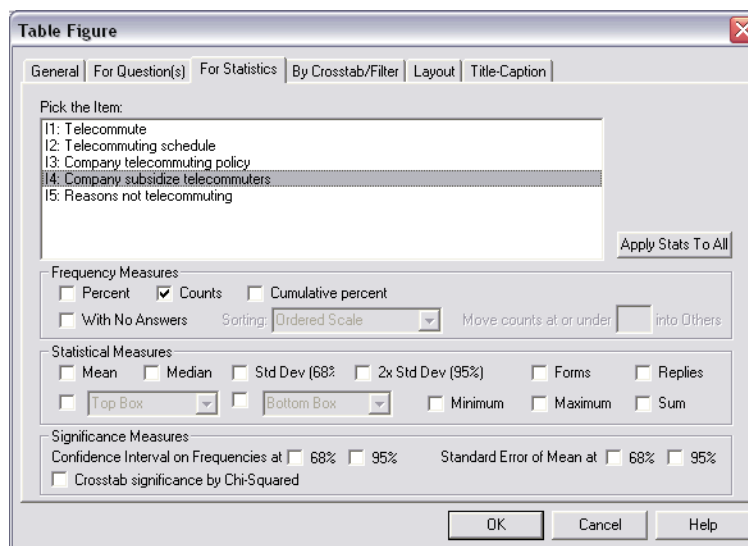
## For Statistics Tab

This tab will include the statistics applicable to your figure type and selected For Question(s). In figures without this tab, the statistics and sorting options will appear in other tabs.

For Text and Table figures, the dialog is identical, with a set of statistics in the lower half of the dialog and the ability to select individual Stub items in the upper half (will appear gray if a single question or group is the For Question).

Table+Bar and Bar Chart figures have a different arrangement of options due to the format of the graphs, but the meanings of the settings is the same.

Note that some of these settings also appear on other tabs. If they appear on a Layout tab (such as for Pies) then they apply to the For Question. If they appear on a By Crosstab/Filter tab, then they apply to the crosstab question.



### Pick the Item Apply Stats to All

When working with a Stub list, you may be mixing items which support different statistics. Click on each item to set individual statistics, or click Apply Stats to All and SurveyPro will apply whichever of your selected stats are valid to each question.

### Frequency/Statistical/ Significance Measures

See *Statistics in SurveyPro* on page 207 for a description of all the statistics. Which ones appear depends on the type of figure and scale.

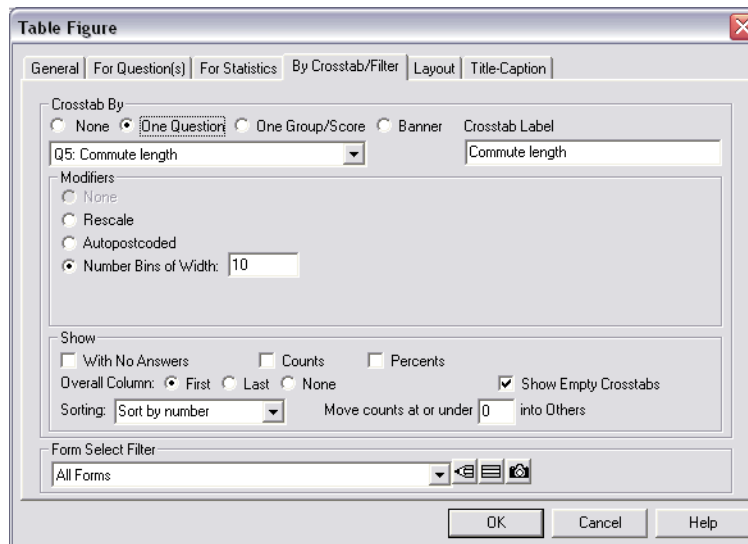
**With No Answers** Includes a category for the number of people who skipped the question. This is distinct from marking a NA you configured in the scale definition (see page 72). When you include No Answers, they're added to the denominator for percentage breakdowns.

**Sorting** The options offered depend on the type of scale and modifiers applied.

**Move counts at or under \_\_\_\_ into Others** By default, SurveyPro will count all repeated responses to Other blanks and short written answer scales (including telephone and Zip pattern scales). Use this setting to adjust the number of times an answer has to be provided before it shows as a unique response or is combined with other outliers into "Other."

## By Crosstab/Filter Tab

In addition to the primary question(s) and statistics in your figure, you can break down your analysis by the responses to a question, Group, or Banner. Banners are useful when you need more flexibility than is available here, or plan to re-use your settings (see page 223). This tab also includes statistics which apply to the crosstab question.



**Crosstab By** Select a question, Group, or Banner to break down your For Question's responses.

**Crosstab Label** An optional label override for the crosstab. Banners offer additional label controls.



<b>Modifiers</b>	You can apply an optional Rescale to change the labels, grouping or structure of the selected question(s). With date and number scales you'll also see options for quick binning into common categories, and written answers are autopostcoded. See <i>Modifiers &amp; Rescales</i> on page 216.
<b>With No Answers</b>	Includes a category for the number of people who skipped the question. This is distinct from marking a NA you configured in the scale definition (see page 72). When you include No Answers, they're added to the denominator for percentage breakdowns.
<b>Overall Column</b>	Adds a column for all responses to the For Question (after applying the Form Select), in addition to the breakdown columns. Banners offer additional options.
<b>Show Empty Crosstabs</b>	Includes a column for By Question or Banner categories which did not receive any responses, such as keeping a column for Alaska even though no respondents had marked it as their residence.
<b>Sorting</b>	The options offered depend on the type of scale and modifiers applied.
<b>Move counts at or under ____ into Others</b>	By default, SurveyPro will count all repeated responses to Other blanks and short written answer scales (including telephone and Zip pattern scales). Use this setting to adjust the number of times an answer has to be provided before it shows as a unique response or is combined with other outliers into "Other."
<b>Form Select Filter</b>	Form Selects subset the database based on answers to questions, form numbers, and other criteria. Select among the Form Selects already defined, or use the buttons to duplicate, insert, and modify filters.

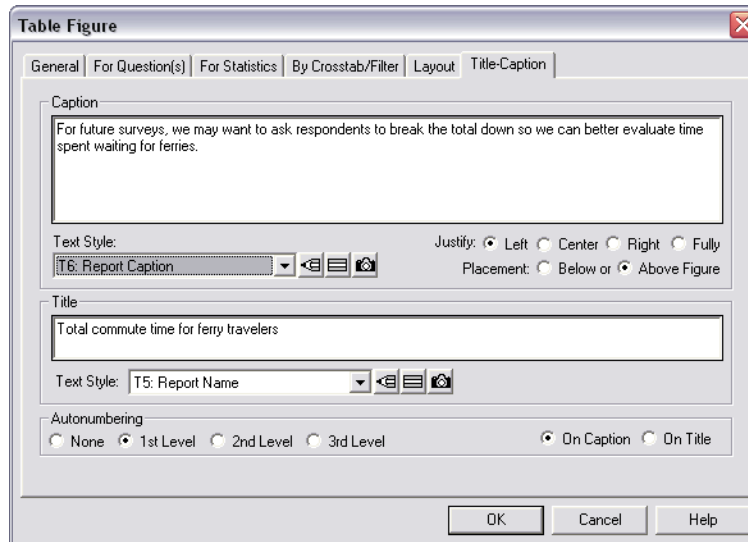
## Layout Tab

See also the individual figure types for layout options. Common controls include:

<b>Question Numbers</b>	With a single questionnaire document, the question numbering is quite straightforward. However, if you have multiple questionnaire documents and/or ones which have evolved over time, you may want to use an internal question number rather than the primary survey's autonumber values.
<b>Color Fill Set</b>	The fill set for a graph can be set at the document level or overridden on an individual figure. Use the Insert, Modify and Duplicate buttons to add and edit sets. See page 250.
<b>Text Style for Contents</b>	Sets the base Text Style for the figure's labels and data.
<b>Dimensions</b>	Sets the width of the tile, placement of the figure within it, and the size of the figure itself. See also <i>Working with Tiles</i> on page 39.

## Title-Caption Tab

These titles and captions are tied to the figure, and will stay with it in the document. You can also add titles, subheads and comments using text graphics (see page 45) and annotations with anchored graphics (see page 49).



### **Caption**

While in the text box, it will preview all your settings except the basic typeface. Use the Text Palette to change the typeface, size, color, etc. You can type up to 2000 characters, and multiple paragraphs. If you need additional characters, insert a text graphic after the figure.

### **Justify**

Sets the alignment of the caption within its tile boundaries and any indentation settings.

### **Placement**

The caption defaults to below the figure. If you place it above, it will still appear below any title text.

### **Title**

As with the caption, allows up to 2000 characters and line breaks. Appears centered above the figure.

### **Text Styles**

Text Styles provide the basis for your font settings. Use the Insert pencil point to add new styles for different types of information such as instructions, or modify existing styles to suit your needs. Remember, when a style is changed, all tiles using it are automatically updated. If you need to override a style for just one tile or a few letters use the Text Palette.

### **Autonumbering**

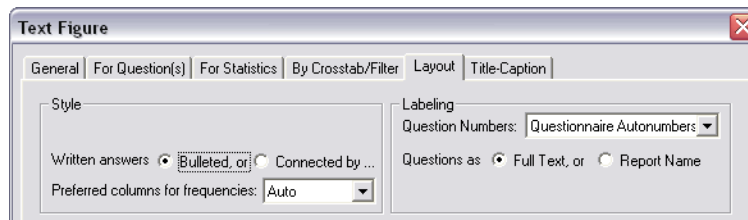
Autonumber can be applied to either the title or the caption. See page 38.

## Text Figures

Text figures and tables are very similar, both producing the greatest range of statistics. Their primary use is for reporting comments and other non-repeated text strings, but they can be applied to any scale type.

Most of the functions are covered under the descriptions of the shared tabs starting on page 187.

## Special Layout Tab Options



### Written Answers

Comments and Other responses which are not tabulated may be presented as a bulleted list or a continuous paragraph with responses separated by ellipsis.

### Preferred columns

When the Text Figure contains frequencies, this sets the number of columns in which they are reported (SurveyPro's automatic setting is to create the most compact layout).

### Questions as

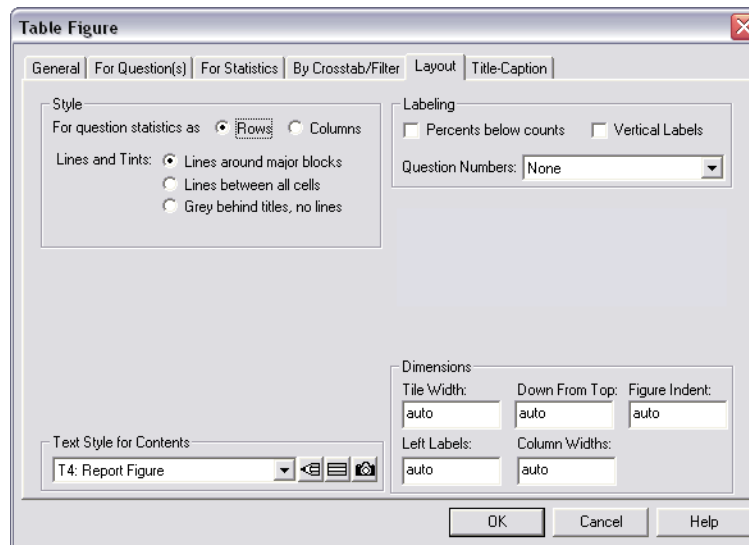
Specify whether you want the questions listed with their complete text or just the short report labels.

## Tables

Tables are the best way to present a great deal of numeric information, particularly with complex cross-tabs. When tables are pasted into a spreadsheet or word processing software, they will come through as editable text.

Most of the functions are covered under the descriptions of the shared tabs starting on page 187.

## Special Layout Tab Options



**For question statistics as** By default the For question is the row, and the By the columns, but you can swap layouts for style preferences or to better fit on a page (often this will eliminate a wrap in a table).

**Lines and Tints** Changes the style of the table.

**Percents below counts** If your table includes both percentages and counts, by default they are side-by-side in a cell. You can change this to a stacked arrangement.

**Vertical Labels** Rotates the column labels for a more compact arrangement. Rescales (see page 216) and Banners (see page 223) can also be used to edit labels.

**Left Labels** Overrides the automatic column width settings, which are to make columns as narrow as possible given the contents and Text Style. You can set the first column (row labels) separately from the other columns.

**Column Widths**

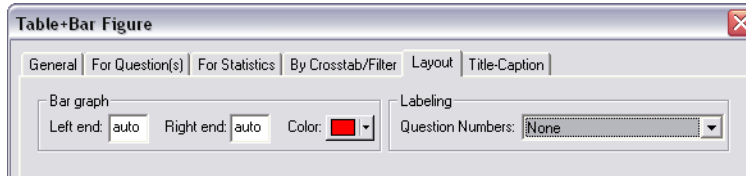
## Table + Bars

These charts are a great hybrid of a table's numeric data and a visual representation of the responses. Table+Bars can display almost as much information as Text and Table figures—the only absence is the Stubs.

Most of the functions are covered under the descriptions of the shared tabs starting on page 187.

## Special Layout Tab Options

Be sure you set the Bar Graph Portion statistic on the For Statistics tab before overriding the axis ends.



### Left/Right end

By default, SurveyPro will set the bar axis ends based on the contents, such as 0 to 100 for percentages, or the scale end points for the mean. You can override those endpoints by typing values in these boxes. To re-set, simply type “auto” as the value.

### Color

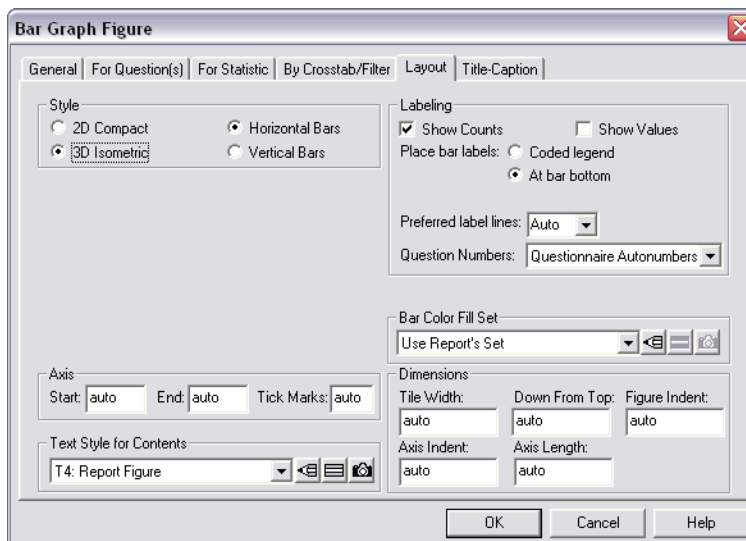
Select a color from the drop-down palette or click Other for more options.

## Bar Chart

Bar charts are at their best when working with a single question or group, though as with all reporting there are many uses for the figure types. If you're cross-tabbing your bar chart, you may want to look into stacked bars (see page 198).

Most of the functions are covered under the descriptions of the shared tabs starting on page 187.

## Special Layout Tab Options



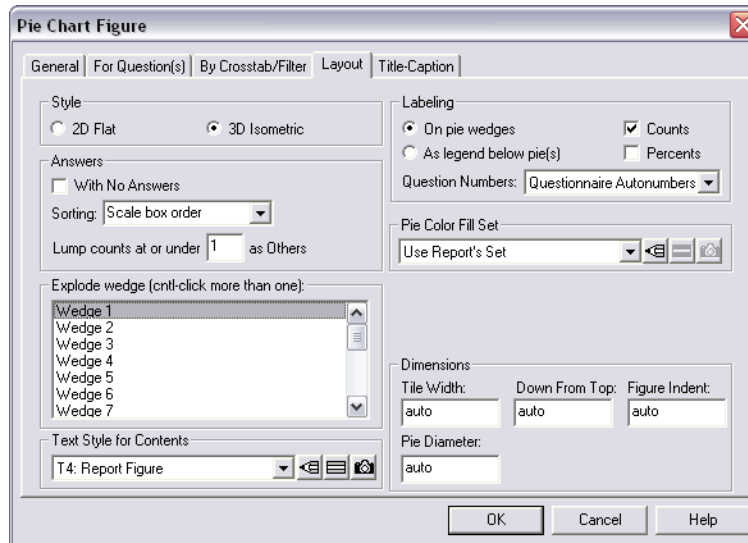
<b>2D/3D</b>	Bar graphs are 3D by default, but you can change this for a more compact layout.
<b>Horizontal/Vertical Bars</b>	With vertical graphs, SurveyPro automatically rotates any question labels and numbers you have at the bar ends.
<b>Show Counts/Values</b>	Place the counts and/or values at the ends of the bars. Values are whatever you selected in the statistic tab, whether percentages, mean, etc.
<b>Place bar labels</b>	Unless you have extremely long labels, having them at the bar bottom is generally the easiest way to read them.
<b>Preferred label lines</b>	Override the number of lines labels wrap onto to adjust spacing.
<b>Axis</b>	Mark the beginning and end points for the axis (typically the scale end values), and if desired, the breakdowns in between.
<b>Axis Indent</b>	Type a value in inches for the start of the axis, regardless of the length of labels at bar bottom.
<b>Axis Length</b>	Overrides the automatic scaling of the axis. Enter a value in inches.

## Pie Chart

Pies very quickly and intuitively convey the breakdown of responses to a single question, particularly with 10 or fewer answer options. They can also be used for cross-tabs and larger distributions, but in those cases you may want to look into *Bar Chart* on page 195 and *Stacked Bars* on page 198.

Most of the functions are covered under the descriptions of the shared tabs starting on page 187.

## Special Layout Tab Options



### **2D/3D**

Create circular 2D pies, or angled 3Ds.

### **Answers**

These controls are identical to those on the For Statistics tab of other figures. See page 189.

### **Explode wedge**

Wedge 1 is the first clockwise of vertical, and you can explode as many wedges as you like.

### **Labeling**

Labels on pie wedges have an angled line tying them to a slice. Legends tend to work best when there are many tightly packed slices, or with a cross-tab where there are many pies and a single legend works for all of them.

### **Counts/Percentages**

Click these to display the percentages and/or counts with the slice labels.

### **Pie Diameter**

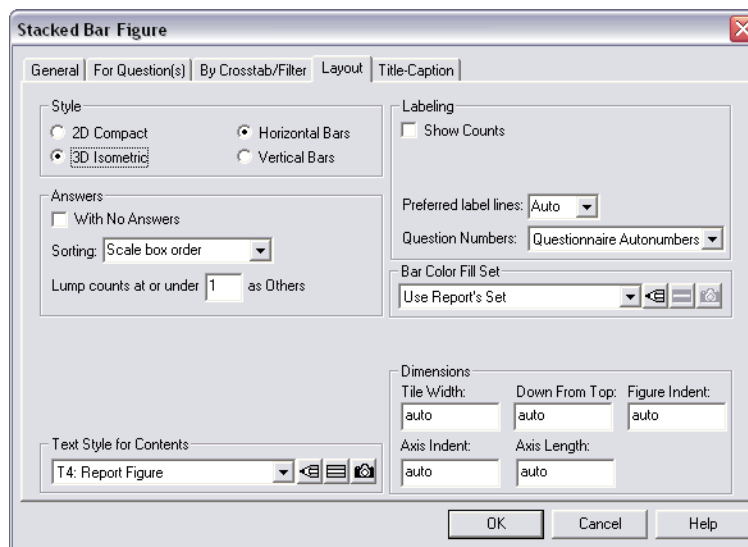
Allows you to specify a size for the pie(s) in inches.

## Stacked Bars

Stacked bars are the densest visual approach for cross-tabs and detailed question group analysis.

Most of the functions are covered under the descriptions of the shared tabs starting on page 187.

## Special Layout Tab Options



- 2D/3D** Bar graphs are 3D by default, but you can change this for a more compact layout.
- Horizontal/Vertical Bars** With vertical graphs, SurveyPro automatically rotates any question labels and numbers you have at the bar ends.
- Answers** These controls are identical to those on the For Statistics tab of other figures. See page 189.
- Show Counts** Place the counts at the ends of the bars.
- Preferred label lines** Override the number of lines labels wrap onto to adjust spacing.
- Axis Indent** Type a value in inches for the start of the axis, regardless of the length of labels at bar bottom.
- Axis Length** Overrides the automatic scaling of the axis. Enter a value in inches.



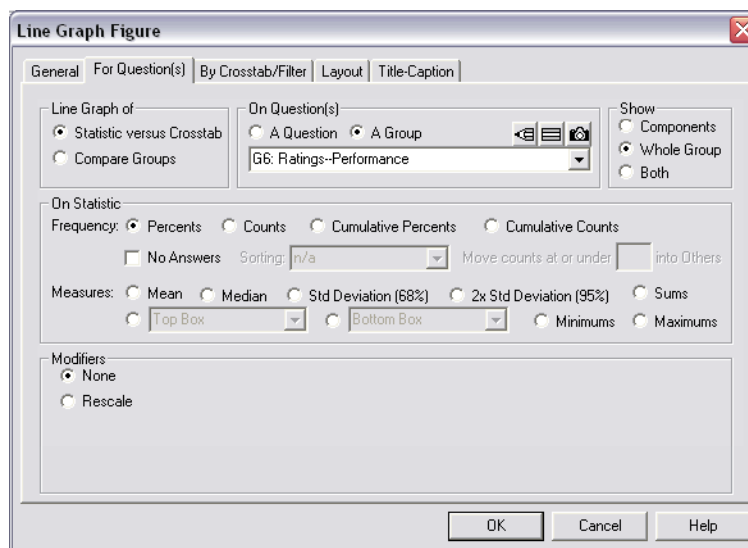
## Line Chart

Line Charts have two modes: crosstab and question group. Statistic versus Crosstab charts lines for each crosstab “by” or column. Compare Groups is similar to the compare group pairs figure (see page 201), but offers the ability to chart up to 8 groups or group/filter combinations.

Most of the functions are covered under the descriptions of the shared tabs starting on page 187.

### Statistic versus Crosstab For Question(s) Tab

When line graphs are in crosstab mode, two tabs appear to select the primary (For) and crosstab (By) questions or groups.



#### On Question(s)

The figure can be for a single question or question group.

#### Show

Groups can be presented as a single unit, showing each question within the group, or both. The best choice usually depends on the type of figure and whether you're using a cross-tab.

#### On Statistic

These controls are identical to those on the For Statistics tab of other figures. See page 189.

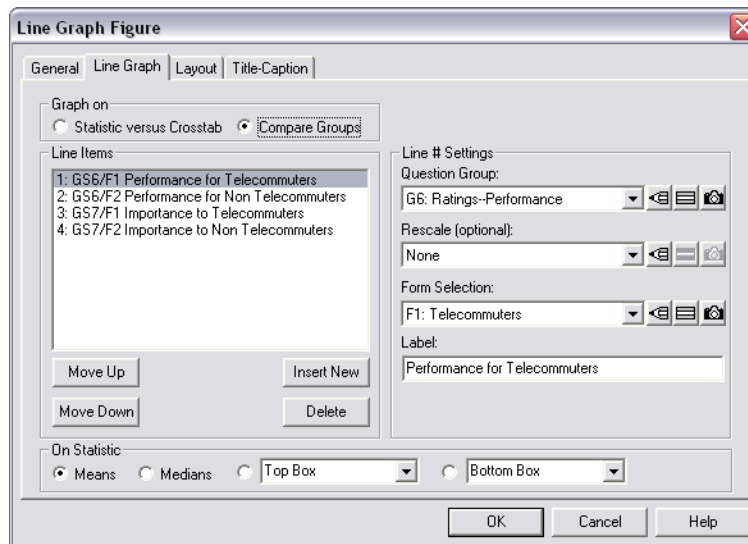
#### Modifiers

You can apply an optional Rescale to change the labels, grouping or structure of the selected question(s). With date and number scales you'll also see options for quick binning into common categories, and written answers are autopostcoded. See *Modifiers & Rescales* on page 216.

## Compare Groups For Question(s) Tab

The Compare Groups mode for line graphs allows you to chart up to 8 customized lines. In this case, a question group is being graphed for the overall results and for breakdowns by business size. Another set of lines could be added for a second group using the same breakdowns.

Controls on the right-hand side of the dialog are driven by the item selected in the left-hand list.



### Line Items

Click the buttons below the list to rearrange, add, and remove list items. Each line is identified with the Question Group number, any Form Select Filter you've added, and then the label you specify.

### Question Group

Select among existing groups or use the Insert, Modify and Duplicate buttons to add new ones. See *Question Groups & Scores* on page 228.

### Rescale

You can apply an optional Rescale to change the labels, grouping or structure of the selected question(s). See *Modifiers & Rescales* on page 216

### Form Selection

Form Selects subset the database based on answers to questions, form numbers, and other criteria. Select among the Form Selects already defined, or use the buttons to duplicate, insert, and modify filters.

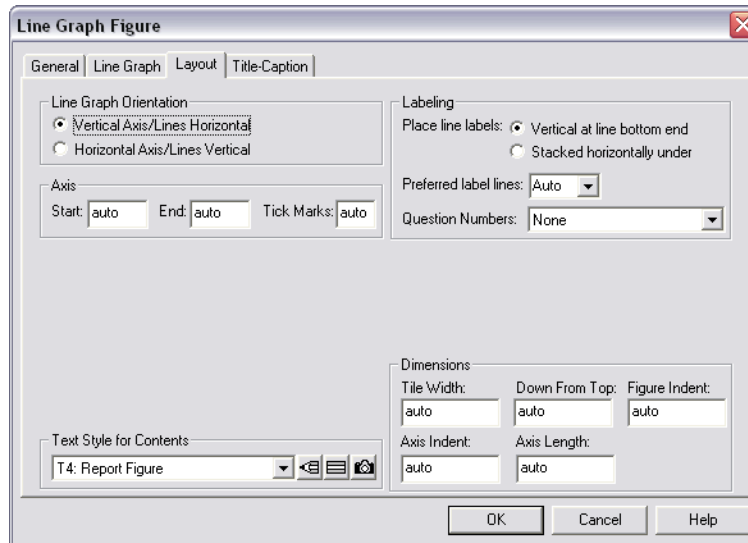
### Label

Set the legend labels for the chart.

### On Statistic

These controls are identical to those on the For Statistics tab of other figures. See page 189.

## Special Layout Tab Options



### Line Graph Orientation

Lines may be charted horizontally or vertically in the figure.

### Place Line Labels

Shorter labels work well vertically under the figure, while longer labels may be accommodated stacked. This is for the axis labels, not the line labels which are contained in a legend.

### Preferred label lines

Override the number of lines labels wrap onto to adjust spacing.

### Axis

Mark the beginning and end points for the axis (typically the scale end values), and if desired, the breakdowns in between.

### Axis Indent

Type a value in inches for the start of the axis, regardless of the length of labels at bar bottom.

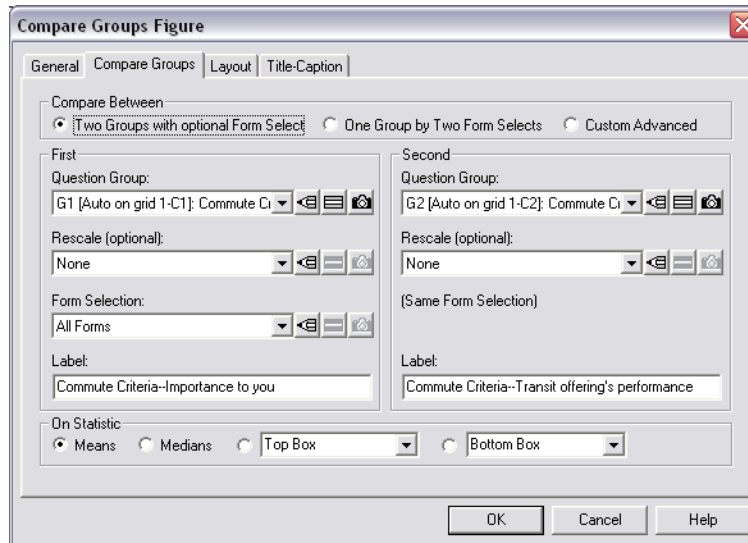
### Axis Length

Overrides the automatic scaling of the axis. Enter a value in inches.

## Compare Groups Pairs

Comparison graphs do simply that—compare the results for two question groups (i.e. importance vs. performance), two demographic groups, or a combination of the two. These can be laid out as scatterplots, bar graphs showing differences in means, or line graphs. If you need to compare more than two items, see the *Line Chart* on page 199.

## Compare Groups Tab



### Compare Between

The Custom setting is a super-set of the two more common applications: comparing two groups or comparing two respondent segments across one group.

### Question Group

Select among existing groups or use the Insert, Modify and Duplicate buttons to add new ones. See *Question Groups & Scores* on page 228.

### Rescale

You can apply an optional Rescale to change the labels, grouping or structure of the selected question(s). See *Modifiers & Rescales* on page 216

### Form Selection

Form Selects subset the database based on answers to questions, form numbers, and other criteria. Select among the Form Selects already defined, or use the buttons to duplicate, insert, and modify filters.

### Label

Set the legend labels for the chart.

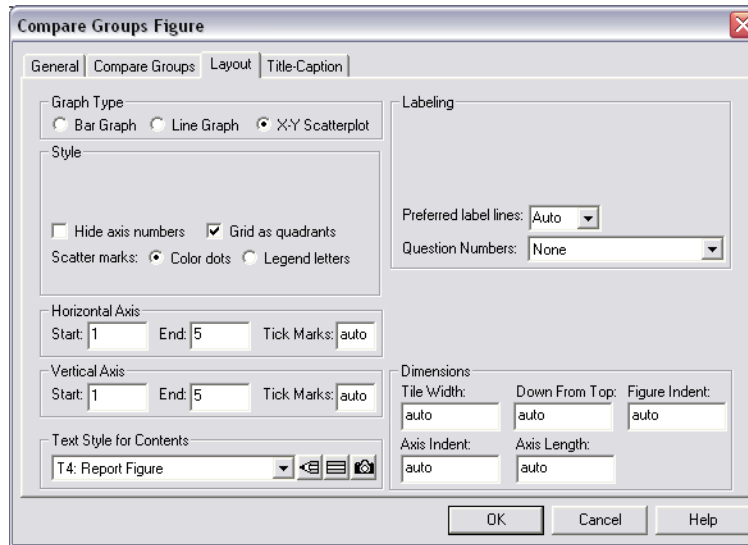
### On Statistic

These controls are identical to those on the For Statistics tab of other figures. See page 189.

## Special Layout Tab Options

Layout settings are driven by the Graph Type in the upper-left corner. In particular, the settings below and to the right of the Graph Type will change greatly based on the chart style.

Below are the settings for X-Y Scatterplot as that is the unique layout for this figure. The controls for the bar and line styles overlap with layout options for *Bar Chart* on page 195 and *Line Chart* on page 199.



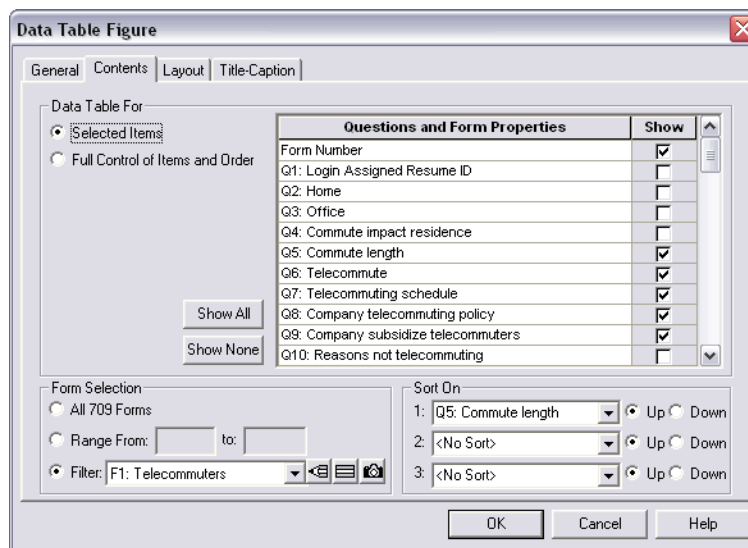
- Graph Type** The best way to determine which style suits your report is to try a few settings, edit the figure, try a few others, and so on.
- Hide axis numbers** Removes the axis numbers from the scatterplot, leaving only the distribution of dots.
- Grid as quadrants** Adds quadrant lines within the scatterplot.
- Scatter marks** Switches between colored dots and lettered points for black and white reproduction.
- Preferred label lines** Override the number of lines labels wrap onto to adjust spacing.
- Axis** Mark the beginning and end points for the axis (typically the scale end values), and if desired, the breakdowns in between.
- Axis Indent** Type a value in inches for the start of the axis, regardless of the length of labels at bar bottom.
- Axis Length** Overrides the automatic scaling of the axis. Enter a value in inches.

## Data Table Figure

Data Tables are a more flexible version of the Data Table report. You can also intermix them with other figures in a longer report, such as a figure containing comments along with the respondent name and the rating they gave service.

### Contents Tab

Select among a few key questions or include them all.



### Data Table For

By default, the dialog lists all questions in the survey with Show All and Show None buttons for quick marking or clearing of the list. Select Full Control to switch to a Stub List mode where you can change the sort order and labels for each column (see page 206).

### Questions and Form Properties

Lists all questions in your project, as well as question groups and system fields such as the form number and date/time stamp.

### Form Selection

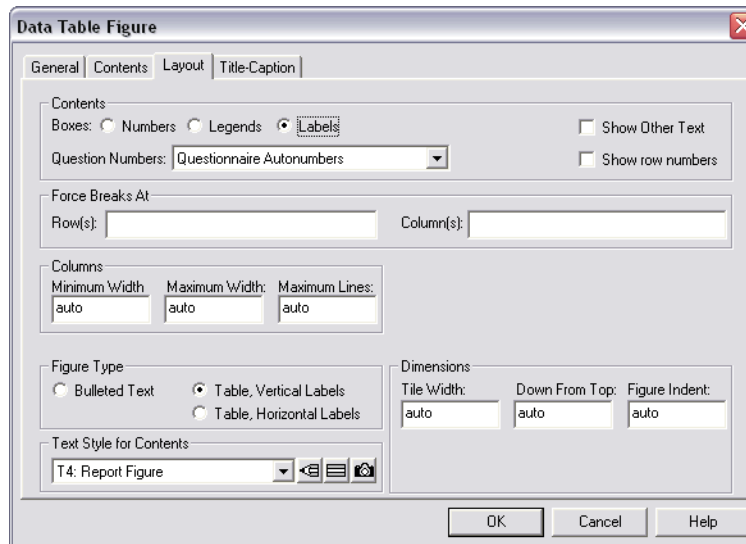
Select the forms you'd like to include by a form number range or with a filter. See page 212.

### Sort On

Sort the data using up to three questions, including ones which are not shown in the table.

## Special Layout Tab Options

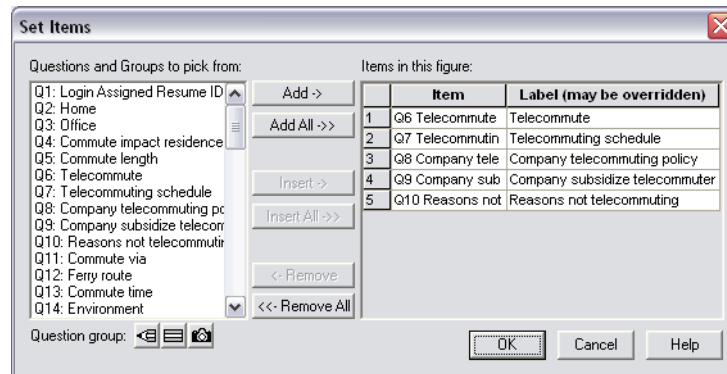
Data Tables are primarily designed for content, and have just a few layout settings.



- Boxes** Sets whether to display the checkbox number, the 1 or 2 digit legends, or the full text label. If you'd like to modify the legends, go back to the Scale definition (see page 72).
- Show Other Text** Select to include the text of Other responses as well as the number of people who marked an Other box.
- Show row numbers** Numbers each row of the table. Another option is to include the Form Number for each respondent.
- Force Breaks At** Allows you to specify row and column numbers at which you would like the table to break.
- Columns** Override the default spacing with the minimum and maximum column widths, as well as the maximum number of lines to wrap a cell.
- Figure Type** Select Bulleted Text for a format which focuses on an individual respondent and allows for a great deal of data. Select a Table format for a more compact view which also copies and pastes well into spreadsheet software.

## Stub List Dialog

Stub lists are used to select multiple questions for inclusion in a text figure or table. Unlike Question Groups, stub lists do not have to have compatible scales—you can assemble any combination you like. Stubs are not named items, so if you'd like to reuse one, copy and paste the figure, then make edits on the copy.



### Add/Insert/Remove

Click to add and remove items from the master list of questions to the stub list for this figure.

### Questions and Groups

The list will display questions and groups, to be added to the Stub list. At the bottom of the list, you can insert, modify and duplicate groups.

### Items in this figure

Type edits directly into the grid rows. To rearrange items, click on the gray box at the left of the row once to select it, then click and drag, releasing when the red line is where you want the item to go.

## Clone Figures Dialog

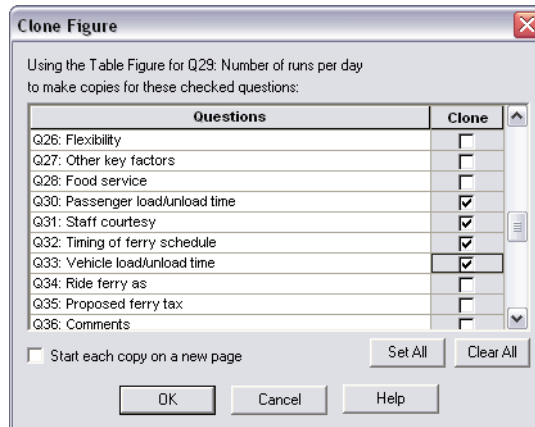
*Accessed from the Insert menu.*

Use Clone Figure to quickly replicate a figure for several other primary questions (the For Question tab). Note you can also copy/paste figures for just one or two, and you can embed the results for several questions in a single figure with Stubs (see page 206) or Groups (see page 228).

Unlike questions where copying and pasting between documents maintains a link (see page 83) copied figures are completely independent and can be freely edited.

All you have to do is select the items you want to use in the right column, decide whether you want a page break before each one (removable later using the Breaks dialog), and click OK.





## Statistics in SurveyPro

When you look in the figure dialogs, you'll see up to three groupings of statistics: Frequency Measures, Statistical Measures, and Significance Measures. (The specific controls which appear depend on the figure type and questions.) In many cases, you may apply more than one statistic to a figure. For example, with a table you could include a half dozen calculations, and even a bar chart graphing percentages could add the counts at the end of the bars.

Depending on the content of the survey, decision being made, and statistical knowledge of the decision makers, it's entirely possible that the Executive Summary report containing only frequency measures is a perfect fit. Greater statistical complexity does not always enhance the decision-making process.

### Frequency Measures

Frequency measures are simply counts and percents, and cumulative percents. The other settings in this section affect what is being counted and how it is being ordered.

Counts and percents will also appear in the Figure dialog's By Crosstab/Filter tab when you have a crosstab selected. Some charts also have the option of adding counts and percents to the graphic

#### Counts

The number of respondents who marked each answer.

#### Percents

Calculated as the number of respondents to a question divided by the total number of replies to that question.

<b>Cumulative %</b>	Applied to ordered scales, by arranging them in order, then keeping a running total of the individual percentages. A specific cumulative percentage is referred to as a “percentile.”
<b>With No Answers</b>	Adds an answer category reporting on how many people didn’t answer. If this is turned on, it affects the number of replies by which percentages are divided.
<b>Sorting</b>	When applied to unordered scales, Sort orders responses alphabetically (written scales), in scale order, or by frequency. It can also be used to simplify figures, reporting on only the most common responses.
<b>Move counts at or under ____ into Others</b>	As with Sorting, Move counts simplifies figures by reducing the number of answers being analyzed. A setting of “0” will force SurveyPro to report every answer, including singles, while increasing the threshold will display only the most common responses.

## Statistical Measures

Where frequency measures look at individual responses, statistical measures tend to look at a question as a whole. Measures include:

<b>Mean</b>	Also known as the average, the mean is the sum of all responses divided by the number of responses. For checkboxes, the mean is based on the box number, and depending on the scale order, a low mean may be better than high.
<b>Median</b>	For continuous data (dates, numbers) you arrange all the responses in order and go halfway down the list to find the “middle” value (equal to 50th percentile). For checkbox and rating scales, a formula is used to calculate how far into a bin the middle would fall, so you will see a number like 2.3 instead of simply 2. The median complements the mean, as it is less likely to be distorted by a few extreme responses.
<b>Standard Deviation</b>	Standard deviations calculate a range around the mean in which 68% or 95% of your respondents replied. For example, if your mean were 30 and your 95% standard deviation $\pm 8$ , then all but 5% of your respondents answered between 22 and 38.
<b>Forms/Replies</b>	Forms is the total number of forms in the database, while Replies is the number of people who marked a particular question.
<b>Top/Bottom Box</b>	If you just want to know how many people were happy, you would select Top Box, or Top 2 Boxes, and SurveyPro would produce a number for everyone who marked Excellent and Good. While this is a handy snapshot, focusing only on the top or bottom boxes can be misleading.

**Minimum/Maximum** These can be applied to any ordered scale, including checkboxes, but tend to be used most for reporting the highest and lowest answers to number and date questions.

**Sum** The sum is a total of all answers, and most commonly applied to number scales (you may also want to take a look at scoring on page 228). Sums can also be applied to other ordered scales, where they will produce a weighted total (3 replies \* box 1 = 3, +, ...).

## Significance Measures

Significance measures look at the data in your file—the data reported by frequency and statistical measures—and *estimate* how accurate it is for predicting the people who didn't reply. If you have a census (100% response rate) or close to it, then there's little need for these predictions.

When significance measures produce an estimate, they do so to a degree of certainty. For confidence intervals and standard error of the mean, you select a certainty of 68% or 95%. Chi-square on the other hand, tells you the likelihood that there is a relationship.

**Confidence Interval on Frequencies** A statistic frequently seen in newspaper polls, this provides a range around percentage frequencies.

**Standard Error of Mean** Calculates a range around the mean into which the population should fall with 68% or 95% certainty. This will be a wider range than the standard deviation which only reports on the data in your file.

**Chi-Squared** In a crosstab, patterns will appear, such as a relationship between the frequency someone purchases and their satisfaction. Chi-squared (pronounced "kai") tells you the likelihood that the relationship is a real pattern and not just random noise. (See *Crosstabs & Banners* on page 223.)

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## Slicing, Dicing, and Rearranging Data

The figures and statistics are just the beginning of SurveyPro's analysis. Everything covered already can be enriched by comparing answers from one group of respondents against another's or just looking closely at one group.

Here are some ideas of what you can do with SurveyPro:

- Create a figure analyzing a subset of the respondents, such as just the females, with Form Select Filters (see page 212).
- Add questions or other dimensions to a crosstab with a banner (see page 223)
- Run a report for the latest quarter's data, or repeat the report for every quarter, using Report On (see page 238)
- Show differences between related questions—typically done by looking at means, medians, or perhaps the percentages of who marked the best or worst choices. Most often, the related questions are in a grid, and analyzed with a Question Group (see page 228)
- Include more than one question in a table row, also known as using a stub list, as covered in *Breaking Data Down* on page 268.
- Change the labels on the questions to make labels and graphs clearer—there are two places for this: Report Labels under the Edit menu, as well as in the individual question tiles. In many places, question labels can be overridden for an individual figure. Scale answer labels can be selectively edited using Rescales (see page 216).
- Combine answers into categories using Rescales (see page 216).
- Change the way statistics are computed or scored by modifying the values underlying the labels—another Rescale (see page 216).
- Score a test for a total, or calculate a score for a satisfaction index on a survey or other application with Groups (see page 228).

*Creating a Report* on page 253 and *Breaking Data Down* on page 268 will introduce you to more possibilities, as well as getting hands-on with Rescales, stubs, and other tools.

## Form Select Filters

Form Select Filters are used in both Answer Entry and analysis, although they are most commonly applied to reports. For example, you would create a figure analyzing respondents over age 55, or people who answered an open-ended question. You can also apply a Form Select to an entire report at once through Report On (see page 238).

Filters are one of the named components you'll find under the Object Tree (see page 15), so once you define a filter it can be reused for many figures. When using filters for data cleaning or experimentation, it's often useful to create a filter called "Working" which is edited again and again as needs change.

### Form Select structure

Filters are in the format:

Item	Relation	Value
Q5	=	"500-999"

Items can be questions (with or without Rescale), document names, entry date and time, or even another Form Select Filter.

Relationships are things like =, <, >, and not equal.

Values are the pre-set scale options, existing data, or hand-typed data as in this range.

### Building Filters

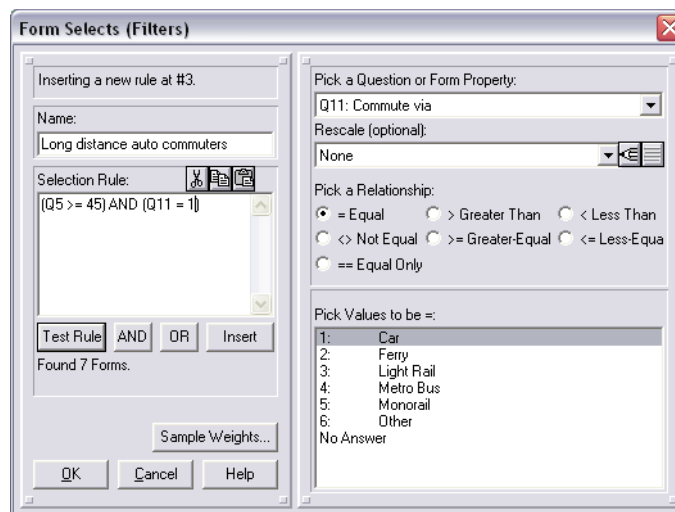
As with other components in SurveyPro, filters are most frequently inserted and edited through the dialogs that use them—just look for the insert button next to the filter drop-down list. If you need a similar figure, and don't want to alter the original, use the duplicate (camera) button.

The right-hand side of the Form Select dialog is a point-and-click interface for building filters. This is the best approach to create a filter, even if you plan on hand-editing it later.

## Form Select Filter Dialog

While filters can be manually constructed using the text box on the left, the easiest approach is to have SurveyPro build it. The AND rule pictured below selects all auto commuters who drive more than 45 minutes. It's built with the following steps:

1. Select the first question from the upper right drop-down list—in this case Q5 Commute length.
2. Click >= Greater-Equal.
3. Select 45 (minutes) from the list.
4. Click the button labeled Insert on the left side.
5. Click AND to add the parentheses.
6. Select the second question, Q11 Commute via.
7. Click = Equal.
8. Select checkbox 1, Car.
9. Click your mouse inside the second set of parentheses.
10. Click Insert.



You'll find it takes longer to read these instructions than to create the rule itself. If you create complex rules with many ANDs and ORs, be very careful to check your parentheses.

It's always a good idea to use the Test Rule button to check your syntax and see if you're getting about the right number of forms.

<b>Name</b>	Filter names can be up to 200 characters and will appear in figures (though some figures allow label overrides).
<b>Selection Rule</b>	The actual specification of what forms to find. Rules can be created or edited by hand, but generally it's easiest to build them with the right-hand panel.
<b>Test Rule</b>	Provides either the number of forms it found or an error statement if it has a problem with the rule's syntax.
<b>And/Or</b>	Add parentheses around the existing rule, the word AND or OR, and an empty set of parentheses at the end of the rule. Depending on the rule you are constructing, you may need to adjust the parentheses.
<b>Insert</b>	Transfers the rule you constructed on the right-hand side into the text box. If the Insert button is grayed out, you need to first click in the text box to tell it where to insert.
<b>Sample Weights</b>	An advanced capability to correct for sampling biases. See page 215.
<b>Pick a Question or Form Property</b>	Lists the questions in the file, form attributes such as the date/time stamp or questionnaire, and any Form Selects you have already defined.
<b>Rescale</b>	Applies a rescale to the question, handy if you have already grouped some checkboxes into categories, or dates and numbers into ranges. When a rescale is applied, it will read R7(Q3) in the rule, meaning the 7th rescale applied to the 3rd question. See page 216.
<b>Pick a Relationship</b>	Sets the relationship between the question or form attribute and the value. Equal Only == will pull a response which is exactly equal to the selected Value, and equal to no others (applies primarily to multiple answer checkboxes and written answers).
<b>Pick Value</b>	Lists the values applicable to the selected question/rescale combination. Dates and numbers without a rescale will list the actual data. Written answers and patterns give you the option of displaying the whole Answers or extracting Keywords to fill the value list. Form Selects can be True or False. If the value you need is not listed (such as January 1, 2007) you can select a similar value to get the correct syntax, then edit the value within the Selection Rule box.



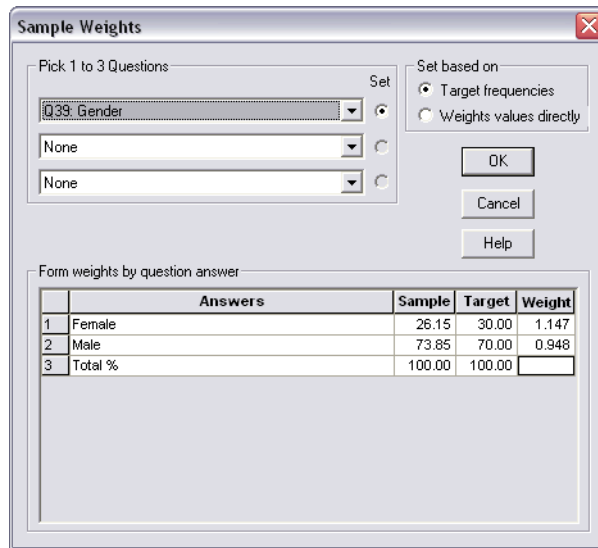
## Sample Weights Dialog

Sample weights are a specialized capability for correcting sampling biases or for forcing a bias to favor a respondent sub-group. They should be used with care or the results will be a distortion rather than an improvement. Related to Sample Weights are Scores for answers.

This is a weighting of the samples; it weights all the answers in each form. Sometimes the term “weights” is used instead for assigning values to responses for statistical or test evaluation purposes, which Survey Pro does through rescales (see page 216) and scoring (see page 228).

The sample weights in Survey Pro are tied to a form select to allow for the cases where the bias differs from one part of the database to another, say differing by quarter on a repeated survey. The sample weighting will only be applied to a figure where its parent form select rule has been applied. Since you can leave the actual selection rule blank, you can still apply weights to all forms.

If you want to weight an entire document, you can apply a Form Select Filter through the Report On settings (see page 238). The Sample Weights button displays the dialog below, which shows one weighting question set.



### Pick 1 to 3 Questions

You can set 1, 2 or 3 questions to weight. Each pull-down list contains all the questions using single answer scales. A multiple-answer scale or rescale cannot be used for sample weights. The Set column of radio buttons determines which question’s weights are being edited.

The order of the questions does not matter, just like any other multiplication problem. Thus if you correct on both Gender and Age questions, it

adjusts for Age and for Gender as separate ratios, then multiplies them when they overlap.

**Set based on**

You can set target frequencies, as for correcting demographic imbalances, or weights, such as when you want to emphasize one group's contributions. This setting determines which fields are active in the lower section of the dialog.

**Form weights by question answer**

When adjusting the Target Frequencies, as shown here, you will be provided with the distribution (subset by the parent Form Select Filter). You must make the target frequencies add up to 100%. The last column, Weight, is for your reference and calculated automatically by SurveyPro.

When you set Weights Directly, SurveyPro ignores the sample's frequencies and target, leaving the right side with two columns.

In either case, you can then edit the Target or Weight by clicking to select it and then typing in the box below. Enter will automatically drop you to the next answer to be weighted.

## Modifiers & Rescales


Rescales add a layer on top of a question, allowing you to change the way data is grouped, ordered, and valued. Examples include:

- Combining Zip codes into regions
- Changing the labels on a scale
- Setting custom values for computations (instead of 1,2,3,4, perhaps 1, 4, 7, 10)

Since it isn't changing the question or data, you can still analyze responses in their original format or use as many different Rescales as you need.

In addition the custom Rescales you can build, most figures include several Modifiers which can be used to quickly group dates into months, or numbers into ranges.

### Building Rescales

Rescales are most frequently inserted and edited through the dialogs that use them—just look for the insert button  next to the filter drop-down list. Rescales are tied to a specific scale type, so only the ones which are valid for the current question will appear in the list.

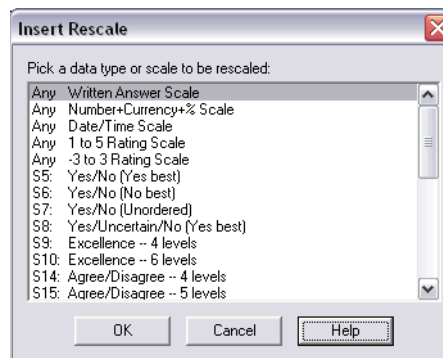
Rescales are built in four stages:

1. Selecting the scale or scale type to which it will apply
2. Processing the raw responses for written answer, number or date/time scales
3. Setting the mapping/grouping/binning of the responses
4. Adjusting the output labels and values

## Rescale Dialog

Checkbox and rating scales already have a set of fixed answers, so you simply use the *Answer Mapping Tab* on page 220 to combine responses, and *Output Bins Tab* on page 222 to adjust labels and values. For other scale types, you need to create sets of responses first. See *Written Answers Tab* in the next section, *Number Inputs Tab* on page 219 and *Date-Time Inputs Tab* on page 219.

See also *Modifiers & Rescales* on page 216.



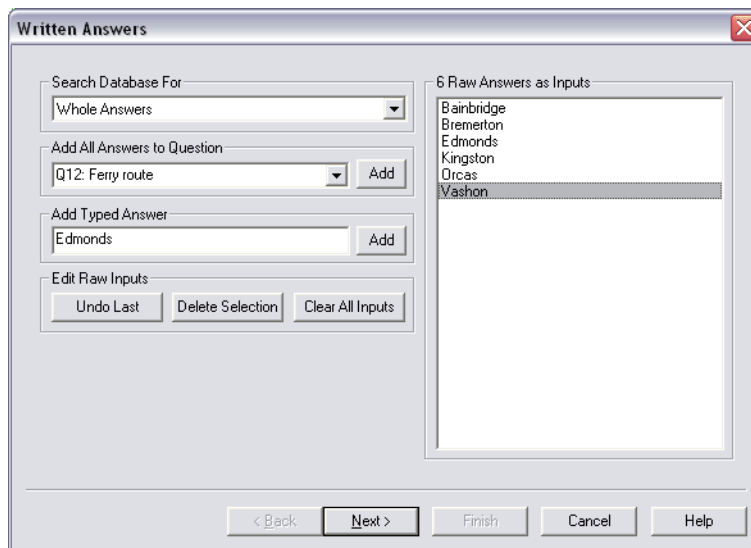
## Written Answers Tab

Written answers can be rescaled in their entirety, or you can work with prefixes, suffixes, or keywords (such as area codes). To construct the Rescale, you first need to create the raw answer inputs, which will be used by the other two tabs beginning on page 220.

For written answers in particular, it is much easier to construct a Rescale if your data has been cleaned. There are also circumstances where post-coding is a better approach than Rescales. See *Data Cleaning* on page 123.

You can build your Raw Answer list by extracting responses from one or more written answer questions, or manually by typing answers. To

remove items, simply select them in the list and click Delete Selection. Note that the order does not matter at this point, just the content.



- Search Database For** Whole Answers work well for short entries, like product names and locations. Keywords work best for longer comments. Prefixes and suffixes are best for IDs, Zip codes, and telephone numbers.
- Add All Answers to Question** Select the question from which to extract responses. You may select more than one question, clicking Add after each one.
- Add Typed Answer** Manually construct or modify the list by typing entries not yet in your database.
- Edit Raw Inputs** Undo the last addition, delete a term in the list, or completely clear the list.
- Raw Answers As Inputs** Includes all answers you wish to use in the rescale. Answers not included will be ignored in figures which use the rescale.

## Number Inputs Tab

You can enter the endpoints and increments, manually enter the bin edges, or both. Don't worry about the Below and Above values if you won't need them—they can be taken care of in the *Answer Mapping Tab* on page 220.

- Format Default** Sets the sensitivity of the bin edges, and will not necessarily be displayed in the final outputs.
- Add Edges from Range** To quickly set ranges, enter low and high values, along with how often you'd like them broken. You can always manually add bins above, below, and in the middle.
- Add Bin Edge** Bin edges are the inclusive upper edge.
- Edit Raw Inputs** Undo the last addition, delete an edge point in the list, or completely clear the list.
- Raw Answers As Inputs** Includes all answers you wish to use in the rescale.

## Date-Time Inputs Tab

The main figure dialogs allow you to group dates into days, weeks, months, quarters and years, and times into several intervals, so you only need to define a Rescale when you need special periods.

Note that you can rescale a sub-set of a date/time scale. For example, if you were collecting the date and time someone visited, you could create

one rescale which grouped respondents by the time of day, and a separate rescale grouping them by month.

**Bins Based On**

Select whether you're rescaling the dates, times, or both, and the formats you'll use for your Rescale. The format does not have to match the scale definition's.

**Add Automatic Bins**

Select whether you're rescaling the dates, times, or both, and the formats you'll use for your Rescale. The format does not have to match the scale definition's.

**Add Bin Edge**

Type here to manually add a date/time bin edge in the format you specified above.

**Edit Raw Inputs**

Undo the last addition, delete an edge point in the list, or completely clear the list.

**Raw Answers As Inputs**

Includes all categories you wish to use in the rescale.

## Answer Mapping Tab

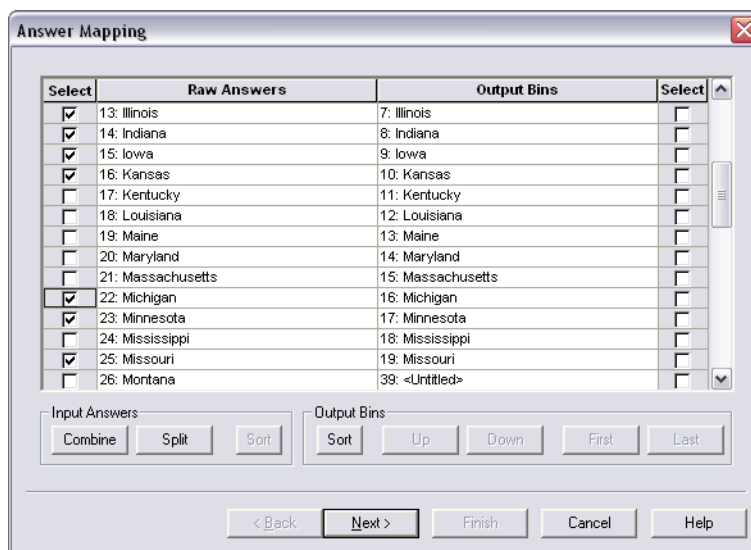
This screen serves two functions:

- Grouping the Raw Answers
- Ordering the Output Bins (can also be done in the Output Bins tab)

The way this works can get a little tricky, but here's a typical scenario:

1. Scroll through the list on the left and select responses you want in one category, such as California, Washington and Oregon. Click Combine which results in all their Output Bins changing to a common "1: <Untitled>."

2. Click on the “1: <Untitled>” bin label and click First to bring it to the top of the list—note that the left list was reordered as it brought its items with it.
3. Switch to the Output Bins tab to assign a name to your new bin.
4. Switch back to Answer Mapping to create another group.
5. Combine another bin, but notice you missed an item, so click on the Answer you need to add, then click on the Output Bin, and click Combine again.
6. Combine a third bin, but notice you had an extra item, so click on that extra in the Answers column, then click on the Output Bin you need to extract it from, and click Split.



**Raw Answers**

Lists all the checkboxes or rating levels in the scale, or the answers you set up in the first tab for Written Answer, Date or Number scales.

**Output Bins**

If you are grouping several Raw Answers into new Output Bins, this column will show the new categories. When you first combine categories, they show as “Untitled.”

**Select**

Use the column next to the Raw Answers bin to mark several Raw Answers you want to Combine. Or use the column next to Output bins to select a bin you want to Split, or to rearrange the items.

**Combine**

Combines any checked Raw Answers together into a new Output Bin, or if a bin is also selected, combines the answers into that bin. Any answers combined with No Answer will be treated like missing responses in figures.

**Split**

Splits an Output Bin apart into its original Raw Answers. If you have specific Raw Answers checked, it will split them out selectively.

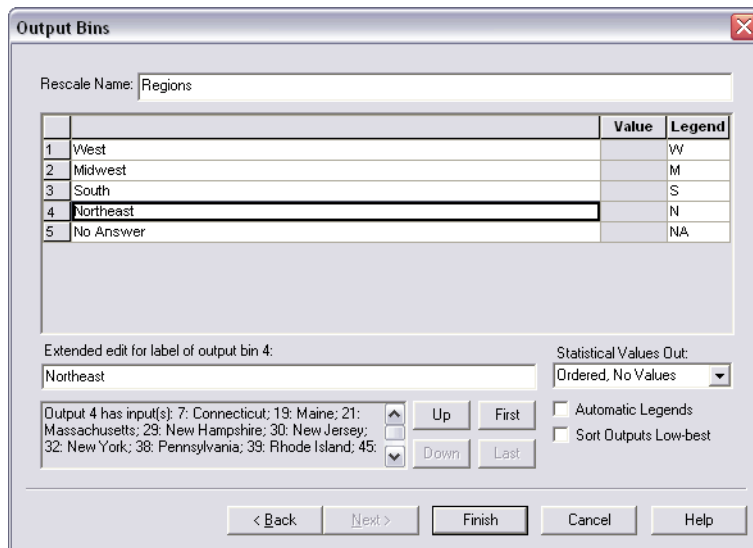
**Sort** Sorts the lists in order of the label number.

**Up/Down/First/Last** Arranges the Output Bins, moving them up, down, and to the top and bottom of the list. Note that a bin consisting of many Raw Answers moves as a single unit (clearer if you sort on the outputs).

## Output Bins Tab

It's very helpful to alternate between this screen and the Answer Mapping if you're doing a lot of rearranging to your scale.

This is the final step, where you set labels, values (for means, scoring, etc.), and legends.



**Rescale Name** Rescale names are displayed in some figures, so it helps to make this descriptive.

**List of Bins** Includes a row for each Output Bin from the Answer Mapping tab. If you've combined categories, this will come in as empty, so use the gray area in the lower-left corner to see what it contains.

**Value** By default Rescales have no values, so they will only produce frequencies, but you can override this with automatic values or custom ones. When Set Own Values is selected, that column in the grid becomes active, and you can type them in.

**Legend** Legends are used in a few figure types. Turn off Automatic Legends to activate this column.



- Extended edit** While in the text box, you can use the Text Palette (see page 44) to change the typeface, size, color, etc. You can type up to 200 characters in a single line/paragraph.
- Output has input(s)** Offers a peek at the items you've grouped into the selected bin.
- Up/First/Down/Last** Arranges the Output Bins, moving them up, down, and to the top and bottom of the list.
- Statistical Values Out** By default Rescales have no values, so they will only produce frequencies, but you can override this with automatic values or custom ones. When Set Own Values is selected, that column in the grid becomes active, and you can type them in. See *Selecting Scales* on page 69.
- Automatic Legends** By default SurveyPro uses a simple alphanumeric legend for reports, but you can override this with your own 1-2 digit labels.
- Sort Outputs Low-best** Applies in analysis when you're working with top box and bottom box settings, and simply tells SurveyPro whether you consider the first answer to be best (top) or worst (bottom).

## Crosstabs & Banners

If you've read a magazine's poll results, you've seen a crosstab. It's simply a comparison of the responses to one question against another:

	Overall	Store Credit Account	
		No	Yes
	77	45	28
Times Visited (Last 6 months)			
0 to 2	50.0%	59.1%	35.7%
2 to 4	38.9%	31.8%	50.0%
4 to 6	8.3%	4.5%	14.3%
6 to 8	0.0%	0.0%	0.0%
8 to 10	1.4%	2.3%	0.0%
10 to 12	1.4%	2.3%	0.0%
Totals	100.0%	100.0%	100.0%
Mean	1.92	1.70	2.25
ChiSq Significance	NA	Under 50%*	

\* Note: ChiSq has over 20% low count cells.

In this table, the number of store visits was selected on the For Questions tab, then Store Credit Account was selected on the By Crosstab/Filter tab. When you look at the data, it appears cardholders visit more frequently, but the Chi-Squared (Ch Sq) of "Under 50%" indicates that's likely to be random variation, not a reliable relationship. The table also has an automatically generated footnote that the results could become more certain with more responses.

Generally you'll want to analyze crosstabs with percentages, since they make it easier to see the relationships and not be distracted by significantly different response numbers. In the example above, note the dramatic difference between the number of respondents in the three categories (in gray bar), which would make finding patterns with counts very difficult.


SurveyPro will apply crosstabs to most figure types, although it's better suited to some than others (see page 185).

## Banners

Banners are commonly used to create crosstabs, but they can also be used for much more. A Banner is another SurveyPro Component, in this case a saved definition of one or more column specifications. Yes, they can be applied to pie charts as well, but it's easiest to describe them in terms of columns.

The simple crosstab example in Banner form would consist of two items: the first a Filter item to select all forms for the Overall, and the second a 2D crosstab using the Trip Purpose question. For this case, it's clearly simpler to use a regular crosstab, but what about stacking another 2D crosstab next to Trip Purpose? Or another Form Select column, this time restricted to last quarter's responses? Or a 3D crosstab comparing the Amenities question against two others at once? Banners can contain up to 500 columns, and while a crosstab could produce several columns, that still leaves plenty of room for heavy-duty analysis. Since they're named components, you only have to define a Banner once, then it's available in almost any figure type.

Another advantage of Banners is that you can completely customize the labeling, even adding additional headings across multiple items.

As with other components in SurveyPro, Banners are most frequently inserted and edited through the dialogs that use them—just look for the insert button  next to the filter drop-down list.

*Breaking Data Down* on page 268 creates a Banner (among other table tricks), and the full description of the dialog controls is in the Help system.

## Banner Dialog

Banners are a very flexible mechanism for defining cross-tabs within SurveyPro. Banners allow you to run a cross-tab on combinations of questions and/or form selection filters, as well as providing control over labeling and certain tabulation features beyond the basic Figure Definition dialog. Like Question Groups and Form Select Filters, Banners are named building blocks, so once you define one you can select it from any figure dialog.

The easiest way to think of a banner is in a basic cross-tabulation table where the cross-tab appears across the top of the table columns. So even though banners can be used with graphs and Report On, we will use the terminology of columns throughout this section.

In SurveyPro, a banner consists of a series of items where each item can be a Form Select, a 2D cross-tab question or a 3D set of nested cross-tab questions. If you have used a simple cross-tabulation question in the main Figure Edit dialog, then you have already seen a simple 2-item banner consisting of an optional “Overall” column and a 2D cross-tab question.

The settings below would produce the following columns:

- Database-wide values
- Western region (Form Select 5) values
- A set of columns, one for each quarter, for the Western region (2D Crosstab using Q3 with FS5)

The grid in the upper portion lists the banner items, each one of which could be one or many columns. When you click on a banner item you can change its type from filter to 2D or 3D cross-tab, modify the questions, or change the Labels and Modifiers.

- Name** The banner name is used both as a reference in dialogs and in figures. Shorter names are typically best.
- Item List** Lists the items currently defined in your Banner with an internal label reflecting their contents. Click the buttons to the right to add new items at the end (+), insert above, or delete. To rearrange items, click on the gray box at the left of the row once to select it, then click and drag, releasing when the red line is where you want the item to go.
- Sort On** Sorts the figure's rows based on the selected item's values. Does not apply when the figure's primary question is an ordered scale.
- Labels** Allows you to override the default column labels, as well as to set “heading” labels across multiple banner items. See below.
- Item Type** Items can be a simple filter, a 2D cross-tab which breaks down with one question, or a 3D which breaks down by two questions. For example, a 3D cross-tab using gender and Yes/No would result in columns for Female Yes, Female No, Male Yes, and Male No.
- Form Select Filter** Form Selects subset the database based on answers to questions, form numbers, and other criteria. Select among the Form Selects already defined, or use the buttons to duplicate, insert, and modify filters.
- Crosstab** List of all questions in the project.
- More** You can apply an optional Rescale to change the labels, grouping or structure of the selected question(s). See below.

## Labels in Banner Dialog

Another reason for using a Banner instead of a simple cross-tab is that you have complete control over the labeling. In addition to overriding the labels for any filters and questions, you can also create header labels that stack above the columns.

If you use a Header label, it will go continuously across all adjacent banner items specifying the same label. Note that this dialog applies only to the currently selected banner item.

The dialog box titled "Item 3: 2D on Q3 with FS5" contains the following settings:

- Header 1:  None  Start  
Text field: Baseline and Western Results
- Header 2:  None  Start  
Text field: (empty)
- Header 3:  None  Start  
Text field: (empty)
- Override Filter Label: Western Region
- Override Crosstab Label: Last Visit Date

Buttons: OK, Cancel, Help

## Modifiers in Banner Dialog

These settings are scale dependent, so you may not see all for all questions. They apply only to the selected question, so you make settings for each question in a 3D cross-tab independently.

The dialog box titled "Item 3 Crosstab Q3: Last Visit Date" contains the following settings:

- Modifiers:
  - None
  - Rescale
  - Autopostcoded
  - Days
  - Weeks
  - Months
  - Quarters
  - Years
- Answers:
  - With No Answers
  - Show Empty Crosstabs
- Sorting: Sort by date (dropdown)
- Move counts at or under 1 into Others

Buttons: OK, Cancel, Help

### Modifiers

You can apply an optional Rescale to change the labels, grouping or structure of the selected question(s). See Using Modifiers for all the details. With date and number scales you'll also see options for quick binning into common categories, and written answers are autopostcoded.

<b>With No Answers</b>	Check this to add a category for missing responses, so your cross-tab breakdown would be Female/Male/No Answer.
<b>Show Empty Crosstabs</b>	In some circumstances the combination of data, cross-tab setting, and Form Select can create empty cross-tab categories, such as quarters or states with no data. Check this box to display those missing categories.
<b>Sorting</b>	Sorting options apply to unordered scales (written, pattern and unordered checkboxes). By default all responses will be displayed, but you can override this to show only the 5 most popular answers, or only answers with a minimum number of responses—in either case, the rest will be grouped into an “Other” category.
<b>Move counts at or under ____ into Others</b>	By default, SurveyPro will count all repeated responses to Other blanks and short written answer scales (including telephone and Zip pattern scales). Use this setting to adjust the number of times an answer has to be provided before it shows as a unique response or is combined with other outliers into “Other.”

## Question Groups & Scores

Question groups are collections of questions which are analyzed collectively. There are three types of groups which produce significantly different figures and statistics.

### On Scales/Rescales

These are the simplest of the groups, basically just a grouping of questions for common analysis. Typical applications of this type of group are importance/performance scatterplots, bar graphs of group means with an overall line, and frequency distributions. This is the type of group automatically created from question grids.

Whenever you create a question grid, SurveyPro will create a group for each of the scale columns, and these groups can be modified for any required label overrides.

Unlike the scoring groups, On Scales/Rescales requires the scales have compatible structures so they can be analyzed together:

<b>Checkbox</b>	Same scale (based on ID, not labels)
<b>Ratings</b>	Same end-points, such as 1 to 5 or -3 to 3
<b>Forced Rank</b>	Same number of levels

<b>Written Answers and Patterns</b>	Same rescale must be applied to all questions
<b>Dates</b>	Same rescale
<b>Numbers</b>	Same rescale

## Point Scores

Point Scores can be used for exams, or for certain types of assessments such as risk level for a disease. Compared to Weighted Scores these groups are quite straightforward.

In our example here, we're looking at a sample adrenaline addiction assessment:

	True	False
<input type="checkbox"/> I habitually drive over the speed limit	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I drink caffeinated beverages to make it through the day	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I'm frequently late for appointments	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I tend to speak quickly, often dominating conversations	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I pace or fidget	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> I rarely complete "To Do" lists	<input type="checkbox"/>	<input type="checkbox"/>

This is very straightforward, since we just want to give True 1 point, and False or No Answer 0. Whenever you have a situation like this, you only need to set the points for one question, and then you can apply them to all others with the same scale.

In other cases, you may have a mix of scale types, and have to address each answer individually. Values can be either positive or negative, so if you wish to discourage guessing, wrong answers could have -0.25 points on the Points tab

When SurveyPro computes the score for this respondent, it will simply total the points for each question marked (including multiple answer checkboxes).

Scales can be of any type, though written, pattern, date and number scales require a rescale to “bin” them before applying points.

The point scores themselves can also be “binned” into ranges (similar to a rescale or other modifier), such as grade ranges or addition levels in our example. This is very useful if you're planning on cross-tabbing the scores against other questions or want to apply plain text labels to score ranges on the Output Bins tab.

## Weighted Scores

To illustrate the way weighted scores work we'll look at creating a “satisfaction index” for a spa survey. The questions we're working with are a rating grid and a yes/uncertain/no scale. Scales must be discrete and have values, so you may need to apply rescales to some of your own questions (such as written answer and number scales) when creating your groups.

How would you rate your experience on this visit?

	Sublime		Disappointing	
1. Front desk (including making appointment)	4	3	2	1
2. Environment	4	3	2	1
3. Technician's skills	4	3	2	1
4. Technician's manner	4	3	2	1
5. Refreshments	4	3	2	1

6. Do you have any comments on our facilities, staff or services?

---



---



---

7. Would you recommend Sublime Spa to a friend?

Yes  Uncertain  No

Weighted scores take the answers for each respondent and create a numeric score for that respondent. While the score won't appear on their form in Answer Entry, you can treat it like any normal number question for analysis. This means the scores can be reported respondent-by-respondent in a data table figure, or analyzed across all your respondents with means, medians, cross-tabs, and other tools.

In this example we have a mix of scales, so while the best answer for the grid is a 4, the best possible answer for Q7 is only a 3. To eliminate this distortion, we can convert all values to a 1-10 range on the Weighting tab (don't worry, SurveyPro calculates the intervening values).

Question	Scale Value	Converted 1-10 Value
Q1-Q5	4	10
	3	7
	2	4
	1	1



Question	Scale Value	Converted 1-10 Value
Q7	3 Yes	10
	2 Uncertain	5.5
	1 No	1

While we could consider each question equally important, it's more common with this type of group to “weight” certain questions as more or less important. In our case, we want to make the referral question, Q7, twice as important as the others, and Q5 regarding refreshments half as important. If you look in the table below, you'll see this reflected by weights of 1 for Q1-Q4, 0.5 for Q5, and 2 for Q7 (by default, SurveyPro gives all questions a weight of 1). Note that weights apply to the group overall, so they're identical for both respondents in the table.

	First Respondent				Second Respondent			
	Answer	Converted Value	Weight	Score (Weight *Value)	Answer	Converted Value	Weight	Score (Weight *Value)
<b>Q1</b>	2	4.0	1.0	4.0	[blank]			
<b>Q2</b>	3	7.0	1.0	7.0	2	4.0	1.0	4.0
<b>Q3</b>	3	7.0	1.0	7.0	4	10.0	1.0	10.0
<b>Q4</b>	4	10.0	1.0	10.0	[blank]			
<b>Q5</b>	1	1.0	0.5	0.5	3	7.0	0.5	3.5
<b>Q7</b>	Yes	10.0	2.0	20.0	Uncertain	5.5	2.0	11.0
<b>Raw Totals</b>			6.5	48.5			4.5	28.5
<b>Final Score</b>				7.5				6.3

Where Final Score = Total Score ÷ Total Weight.

Note that the second respondent didn't answer two grid questions, reducing the total weight used in the calculation of their final score. You can also opt to have missing values scored at the lowest or highest possible values, which would have given that respondent scores of 4.7 and 7.5 respectively. [See Weighting tab.]

In addition to analyzing the scores numerically, you can also “bin” them into ranges (similar to a rescale or other modifier). This is very useful if

you're planning on cross-tabbing the scores against other questions or want to apply plain text labels to score ranges.

## Question Groups Dialog

In SurveyPro you can evaluate sets of questions as a single unit. There are three different structures to groups, two of which are fairly complex, so we strongly recommend reviewing this conceptual information on page 228 before diving into the dialog controls.

As with other components (such as Rescales and Form Selects), once you define a group you can reuse it in many figures, and when you make a change, it will automatically update all reports using the group.

### Creating Groups

The first two tabs of the group dialog are common to all types:

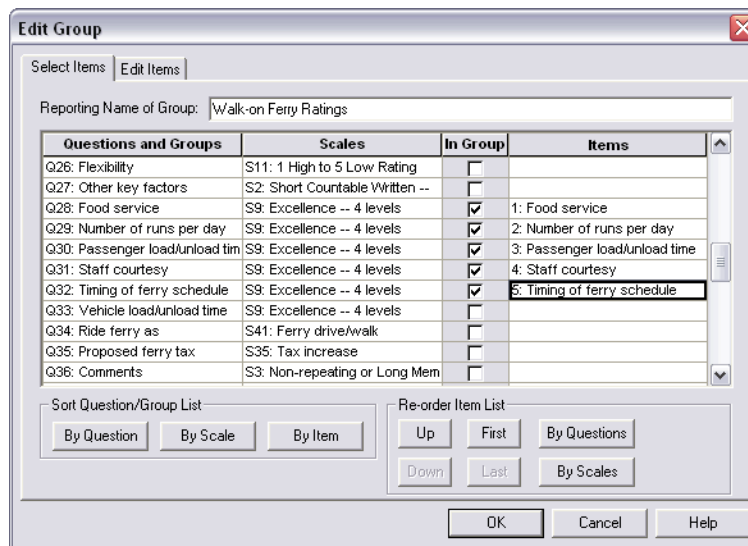
1. Name the group (*Select Items Tab* in the next section)
2. Select the questions to include
3. Order the questions (*Select Items Tab* or *Edit Items Tab* on page 233)
4. Apply rescales to questions as needed (*Edit Items Tab*)
5. Modify question labels and legends
6. Specify the group type

If you are creating a Point or Weighted Score, you'll have two additional tabs to:

7. Specify the calculation details (*Points Tab* on page 234; *Weighting Tab* on page 236)
8. Optionally group score ranges into bins (*Output Bins Tab* on page 237)

### Select Items Tab

In this first tab you give the group a name, select the questions, and have the option of arranging the group order.



**Reporting Name** Group names will appear in some figure types, and can be up to 200 characters.

**Questions and Groups** Lists all questions in your file with their scales. Not all groups can include all scales, so see the details on the three group types on page 228.

**In Group** All questions in your file with their scales. Not all groups can include all scales, so see the detailed pages on the three group types.

**Items** The number at the beginning indicates the order in the group. This can be adjusted using the buttons below, or in the second tab where you modify labels and rescales.

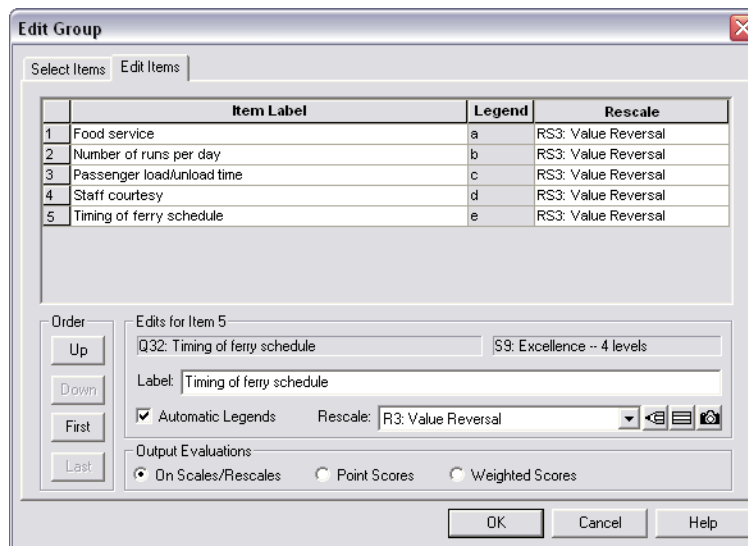
**Sort Question/Group List** Changes the display of the list for your convenience. This does not impact the order of questions within the group (use the buttons to right or the second tab).

**Re-order Item List** Click on an item in the right column and move it up or down in the group. Note that this will be indicated by a change in the number before the item, and not in the rows unless you update the sort.

## Edit Items Tab

Like the Select Items screen, this one is common to all group types.

The lower half of the dialog is driven by the item selected within the grid. Some scale types, such as numbers and dates, require rescales before the group can use them. See also the detailed information on each group type for its requirements.



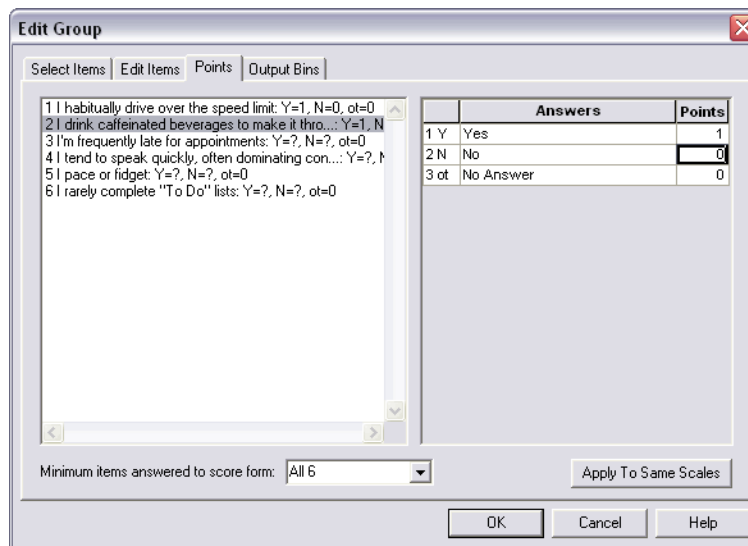
- Item** Select an item in the list to change its rescale or label. You can also type label changes directly into the grid.
- Order** Rearrange the group, moving the selected item up or down in the list.
- Edits for Item** Indicates the original label and scale for your reference.
- Label** Change the figure label for the selected group item. While they can be up to 200 characters, shorter is generally better.
- Automatic Legends** Uncheck this box to type custom 1 or 2 digit legends in the list.
- Rescale** Select from among existing rescales or insert a new one. Note that groups are sensitive to the numeric values underlying scales, so make sure yours are set up properly to produce the calculations you want.
- Output Evaluations** Sets the type of group you are creating. See *Question Groups & Scores* on page 228.

## Points Tab

This dialog only appears if you selected Point Scores on the Edit Items tab.

With a Point Score you need to specify a value for each possible answer within the group. This is done by selecting a group item in the left side and typing points on the right.

If you have a simple assessment, such as our adrenaline test where the points are the same for each item, you can set one question and then use the “Apply to Same Scales” to set the rest.

**Question List**

Lists the questions in the group, along with a peek at their current points. If you need to adjust the order, return to the Edit Items tab.

**Answers/Points**

Lists the possible answers of the selected item. A point value is required for each possible response, and can be positive, negative, or decimal.

**Minimum items answered**

By default, a respondent receives a score if any item is marked, but you can change this to all items or a number in between. Note that with Points you provide a value for No Answer as well as the other possible responses.

**Apply to same scales**

Applies the current item's points to all other items using the same scale.

## Weighting Tab

This dialog only appears if you selected Weighted Scores on the Edit Items tab.

### Important:

If you have not read the detailed information on page 230, please do so first—this section assumes you already understand how the calculations are made.

	Item	Raw Answers	Low To	High To	Weight
1	Food service	1 to 4	1	4	.5
2	Number of runs per day	1 to 4	1	4	1
3	Passenger load/unload time	1 to 4	1	4	1
4	Staff courtesy	1 to 4	1	4	1.5
5	Timing of ferry schedule	1 to 4	1	4	2
6	Vehicle load/unload time	1 to 4	1	4	1

Score No Values As:

Add in as Low value  
 Add in as High value  
 Remove from decision weight

Output score:

Required values to score: Any one

Total Weights = 7  
Raw weighted sum ranges 1 to 4  
Make sum be: 0 to 100

OK Cancel Help

### Item

Lists the questions in the group. If you need to adjust the order, return to the Edit Items tab.

### Raw Answers

Values from the question's scale or rescale. This is a critical component to your calculations, so it's worth double-checking that the low and high ends correspond to the answers you think they do.

### Low To/High To

When working with scales with different ranges, you can minimize bias by converting them to common end points.

### Weight

By default all questions are weighted 1, but this can be changed to any positive value. The easiest approach is to vary the exceptions as here since the weights are relative to each other and not absolutes.

### Score No Values As

If you are allowing scores on incomplete groups you have three options for how to calculate the missing responses. The Low and High options provide worst and best case scenarios, while **Remove from decision weight** tends to be a middle-ground. This is easily changed, so you may want to experiment with the three settings to see their effects on your data.

**Required values to score** You can produce a score on partially complete groups or require all questions be marked for calculation.

**Make sum be** By default SurveyPro converts your score to a 1-100 range. Aside from being an intuitive range, this is very handy when comparing information across groups with different scale levels.

## Output Bins Tab

Output Bins are only available with Point and Weighted Scores.

With the Output off, SurveyPro will report the numeric score you set up in the Points or Weights tab. If you prefer to bin score ranges and apply text labels, you can either turn on the Output Bins or selectively apply Rescales in the figures.

Basically what you do is tell SurveyPro the lower edges of your bins, and it manages the ranges. Then you provide text labels, and optionally legends and values.

The screenshot shows the 'Edit Group' dialog box with the 'Output Bins' tab selected. The 'Enable output bins on values' checkbox is checked, and the text 'Weighted sums can range from 0 to 100' is visible. Below this is a table with the following data:

	Bin Range	Bin Label	Legend	Value
1	Below 50	Unacceptable	a	1
2	From 50 to Below 70	Watch Problem Areas	b	2
3	From 70 to Below 90	Satisfactory	c	3
4	At or Above 90	Outstanding	d	4
5	No Answer	No Answer	na	

Below the table, there is a 'Labels and Legends' section with a 'Label' field containing 'Outstanding' and a checked 'Automatic Legends' checkbox. At the bottom, there is a 'Change Bins' section with 'Add New Bin' and 'Delete Bin' buttons, and a 'Bin Statistical Values' section with radio buttons for 'No Values', 'Ascending from 1 by 1', and 'Descending to 1 by 1'. The 'at edge' field is empty.

**Enable output bins** Without the output bins, the score will simply produce a numeric total for each respondent. With the output bins, the score instead acts like a checkbox scale in figures.

**Weighted sums can range** Lists the possible score range for your group.

**Bin Range** Lists the possible score range for your group.

**Bin Label** Labels can be up to 200 characters, but shorter is usually better. You can type directly in the list, or in the larger box below.

<b>Legend</b>	Labels can be up to 200 characters, but shorter is usually better. You can type directly in the list, or in the larger box below.
<b>Value</b>	The values are used for calculating means and other statistics on the bins. To manually override them, choose Custom Values below.
<b>Label</b>	Labels can be up to 200 characters, though shorter is generally better.
<b>Automatic Legends</b>	By default SurveyPro uses a simple alphanumeric legend for reports, but you can override this with your own 1-2 digit labels.
<b>Change Bins</b>	To add a bin, type the lowest value you want it to contain in the box and click Add. Remove bins by selecting them from the list and clicking Delete.
<b>Bin Statistical Values</b>	Values are used for means, medians, and other statistics in your figures.

## Report On

This is one of the greatest time-savers you will encounter in SurveyPro. With just a few clicks it will let you:

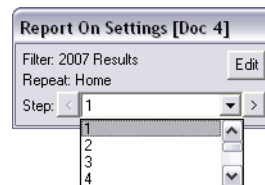
- Tailor an entire report document to the last quarter's results.
- Repeat the report for each answer in a question (similar to a crosstab), such as creating a custom report for each employee being evaluated in a 360 analysis. It'll handle up to 64,000 repeats, so you can use this for larger organizations.
- Create reports tailored to each division, but with company-wide summary data included as well.

Report On has two main settings, which can be applied separately or together: a Form Select Filter and a Repeat Report setting. The first example is using a filter, and the second two a repeat. The third does something really special—instead of applying the Report On settings to the entire report, it's only going to change the data in figures using a special filter called "Report On Selection."



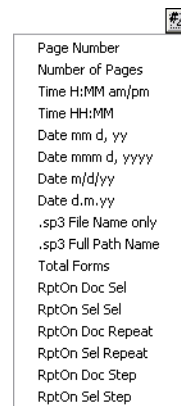
## Switching between repeat versions

Once you turn on Report On, a small navigation palette appears. This will show the number of “steps” in your current settings, and allows you to jump to a step or click through. Remember that these are only views of one document, so that if you edit a figure tile in one step, it will update in all of them.



## Identifying the report version

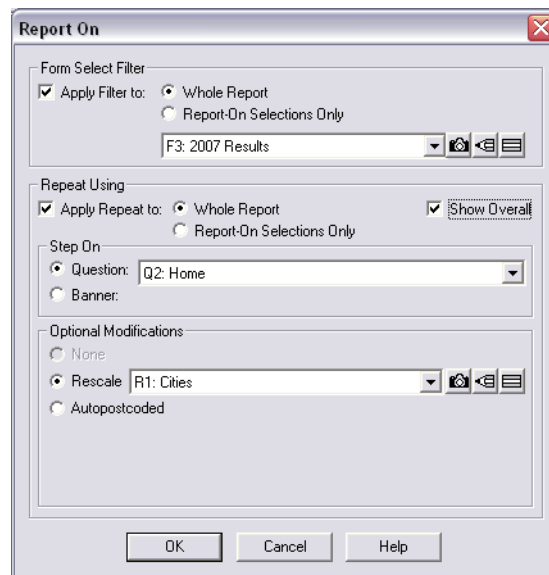
You really don’t want to change the headline, print a version, change it again, and so on for all 64,000 possible repeats—or even for one filter. The solution is to use the variables in the Text Palette (see page 44). Insert an inline text graphic, and type something like “Results for,” then click on the Report On variable you need. These will be replaced with real information as soon as you return to the document.



The best way to get a feel for Report On is to play around with the dialog a little and seeing what it does. For example, if you have a demographic question, put a figure using it into a report, then apply a Report On Repeat using that same question. As you move through the report versions you’ll have a clear indicator of what’s going on. This is exactly what’s done at the end of *Breaking Data Down* on page 268, so you may want to give the tutorial a try.

## Report On Dialog

To remove a Report On, just un-click the two checkboxes for Apply Filter and Apply Repeat.



### Apply Filter

Applies a Form Select Filter to the document, just as you could do manually figure-by-figure.

### Whole Report/Report On Selections Only

By default, Report On settings are made to the entire document. However, you can choose the “Report On Value” option and it will only apply your settings to the figures using the Report On Value Form Select. This way you can interleave in a single document the “overall” results for your entire database with ones tailored to your Report On settings.

### Apply Repeat

Creates a report version for each answer in the selected question, or each column in a Banner. For example, if you apply a Repeat using a regional scale of West, Central, East, you'll end up with three steps of your report, each one reflecting only the respondents from one region.

### Show Overall

Creates a version reflecting your entire database (after applying your Form Select) as the first step.

### Step Using

Select among your questions for the repeat, or use a Banner (see page 223) to generate more complex selections. Your combination of Form Select and Repeat can create a maximum of 64,000 steps.

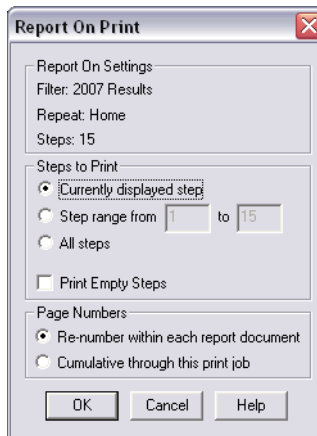
### Optional Modifications

You can apply an optional Rescale to change the labels, grouping or structure of the selected question(s). With date and number scales you'll also see options for quick binning into common categories, and written answers are autopostcoded. See *Modifiers & Rescales* on page 216.

## Printing Report On Repeat Documents

If your Report On includes a Repeat, when you print you'll first be prompted with the steps you'd like to include. An “Empty” step is one where the combination of data and report settings produce nothing to analyze (like a region whose responses are not yet entered).

See also *Publishing Reports* on page 251 for how to create one HTML document for each step.



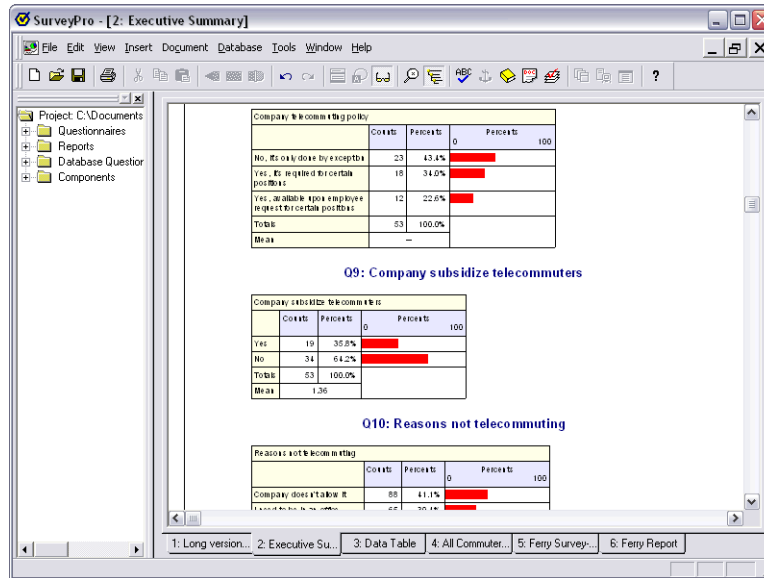
## REFERENCE

# Chapter 16 Reports

Chapter Contents:	Executive Summary Automatic Report . . . . .	243
	Data Table Automatic Report . . . . .	244
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	Executive Summary Tab . . . . .	245
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## Executive Summary Automatic Report

The Executive Summary is a quick run-down of responses to your survey, and uses either table+bar figures or straight text. Best of all, the report is automatically maintained in your project file, so you can take a look at your results before beginning your custom reports.



By default, the report will include results for every question in your project. This can be tailored to a sub-set if needed. You can also adjust the statistics used, although of course you don't have the fine control which comes with a custom report.

While the Executive Summary document cannot be deleted, you can close it if you are working with other aspects of your project. To re-open the report, use the Document menu's Open Document command.

## Data Table Automatic Report

While the Executive Summary views the database overall, the Data Table looks at individual respondents. The report has one row per respondent, and by default includes all the questions as columns (if there are too many to fit across they will wrap onto additional pages).

The screenshot shows a window titled "SurveyPro - [3: Data Table]" with a menu bar (File, Edit, View, Insert, Document, Database, Tools, Window, Help) and a toolbar. On the left is a project tree showing folders for Questionnaires, Reports, Database Question, and Components. The main area displays a data table with the following columns and rows:

Form Number	Login Assigned	Resume ID	Home	Office	Commuter impact residence	Commuter length	Telecommute	Telecommuting schedule	Company telecommuting policy	Company subsidize telecommuters	Reasons not telecommuting	Commuter via	Ferry route	Commuter time	Environment	Cost
1	98139	98122	1	25	2						1; 2	1		5	4	3
2	98113	98006	1	5	2						1	5		3	2	1
3	98134	98041	3	2	2							5		3	2	2
4	98146	98115	4	35								1		3	2	1
5	98108	98119	3	30	2							1		5	4	4
6	98146	98106	2	10								1		4	3	3
7	98003	98158	1	30	2							1; 4		3	2	1
8	98053	98184	4	27	2							4		5	4	4
9	98171	98101	3	35								3		3	2	1
10	98168	98206	15	2							1; 2; 3	4		5	5	5
11	98110	98109	2	20								5		3	2	1

At the bottom, a taskbar shows several open documents: 1. Long version..., 2. Executive S..., 3. Data Table (active), 4. All Commuter..., 5. Ferry Survey-, 6. Ferry Report.

In addition to providing a look at individual respondent responses, the Data Table is also a valuable data cleaning tool, allowing you to quickly pinpoint the form numbers of records needing edits (see *Data Cleaning* on page 123).

The initial settings are designed for the most compact layout, but through the Document Properties dialog you can change the data from checkbox numbers to labels. Document Properties also contains the controls for omitting questions or adjusting the range of forms being reported.

If you need additional controls for this type of report, you can insert a Data Table figure in a custom report document.

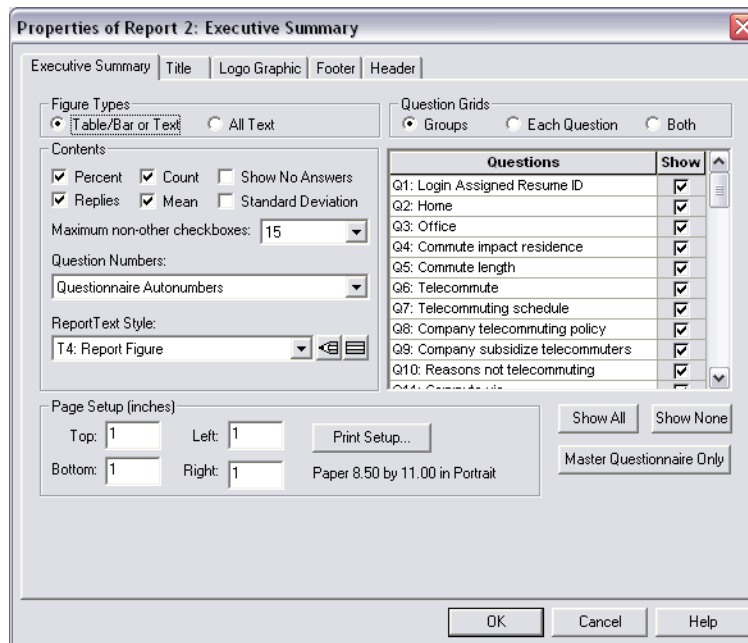
The Data Table document cannot be deleted, but you can close it if you are working with other aspects of your project. To re-open the report, use the Document menu's Open Document command.

## Automatic Report Document Properties Dialog

The Executive Summary and Data Table Document Properties dialogs are a blend of the regular Document Properties and figure controls. This section covers the first two tabs, which are the unique elements. See also *Logo Graphic Tab* on page 34 and *Footer and Header Tabs for Paper Documents* on page 35.

### Executive Summary Tab

The Executive Summary is a quick run-down of responses to your survey, and uses either table+bar figures or straight text (both can be published to HTML). This dialog allows you to change some basic settings on the contents and appearance.



#### Figure Types

By default, the report consists of Table+Bar figures, but you can override this to plain text if desired.

#### Question Grids

The Executive Summary can report on grids as a group, individually, or both. This does not impact the list of questions, where you can un-select individual questions within a grid.

#### Contents

Select among the statistics you want in the report overall. SurveyPro will only apply statistics relevant to the questions, so if you don't see something you want, check your scale definition.

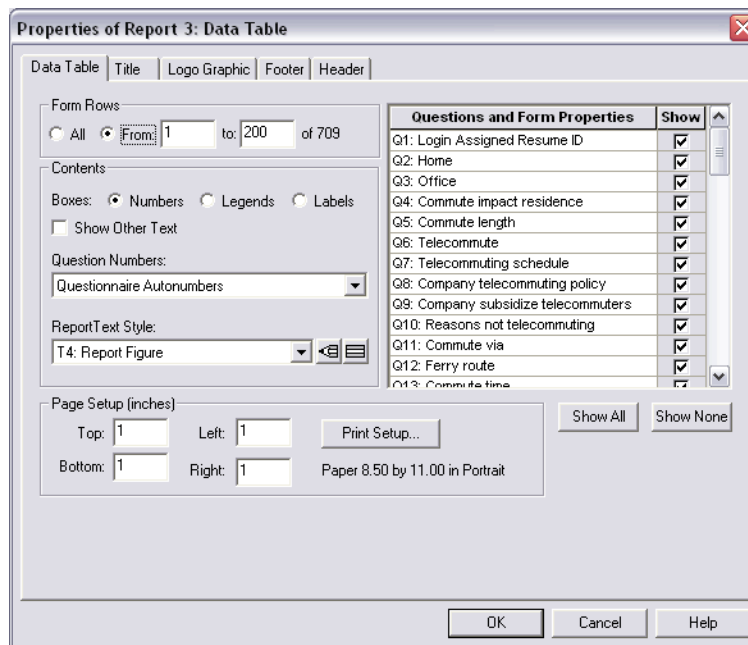
<b>Maximum non-other checkboxes</b>	For unordered checkbox scales you can limit the number of boxes displayed to the most popular responses—everything else will be grouped into an “Other” category.
<b>Question Numbers</b>	With a single questionnaire documents, the question numbering is quite straightforward. However, if you have multiple questionnaire documents and/or ones which have evolved over time, you may want to use an internal question number rather than the primary survey's autonumber values.
<b>Report Text Style</b>	Sets the base Text Style for the figure's labels and data.
<b>Questions</b>	Lists all questions in your project, as well as system fields such as the date/time stamp (though the latter are not selected by default). Click on the checkboxes to include individual questions, or use the buttons below to select all at once.
<b>Page Setup</b>	Sets the margins for your overall document. Page size and orientation are set in Print Setup.

## Data Table Tab

The Data Table has one row per respondent, and by default includes all the questions as columns (if there are too many to fit across they will wrap onto additional pages). This dialog allows you to change some basic settings on the contents and appearance. You can also create a data table figure (see page 204) within a custom report where you have more options and overrides.

To review and edit responses on a form-by-form basis, go to Answer Entry. See *Working with the Database* on page 111.



**Form Rows**

Include all records, or just a range based on the form number. To use a Form Select for more detailed filtering, create a Data Table figure in a custom report.

**Questions**

Lists all questions in your project, as well as system fields such as the date/time stamp (though the latter are not selected by default). Click on the checkboxes to include individual questions, or use the buttons below to select all at once.

**Boxes**

Sets whether to display the checkbox number, the 1 or 2 digit legends, or the full text label, as well as whether you want the Other text included or just a count for the number of Others. If you'd like to modify the legends, go back to the Scale definition.

**Question Numbers**

With a single questionnaire documents, the question numbering is quite straightforward. However, if you have multiple questionnaire documents and/or ones which have evolved over time, you may want to use an internal question number rather than the primary survey's autonumber values.

**Report Text Style**

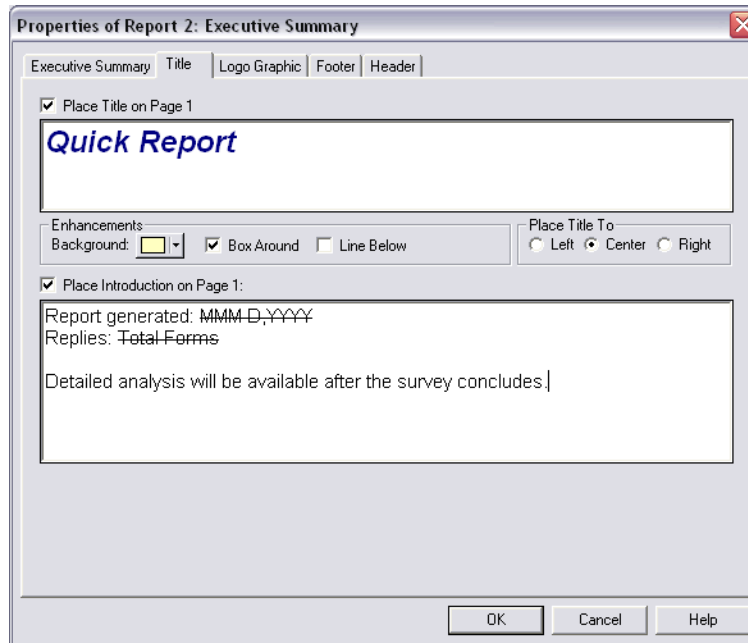
Sets the base Text Style for the figure's labels and data.

**Page Setup**

Sets the margins for your overall document. Page size and orientation are set in Print Setup.

## Title Tab

Because you cannot add individual tiles to the Executive Summary or Data Table, you'll need to use this tab for a title and introduction.



### Title/Introduction

While in the text box, it will preview all your settings except line breaks. Use the Text Palette to change the Text Style or make character overrides for Italic, color, etc. You can type up to 2000 characters and multiple paragraphs. You can also insert variables, which will appear in the dialog with a ~~strike through~~ but display properly once you close the dialog. See also *Text Palette* on page 44.

### Enhancements

Places a black border around the title or a line below.

### Place Title

Either centers the title below any logo you've included using Document Properties, or places it to the right of the logo. If you have not included a logo, you can align the title to left, center or right.

## Report Labels Dialog

*Accessed from the Edit menu when a report document is selected.*

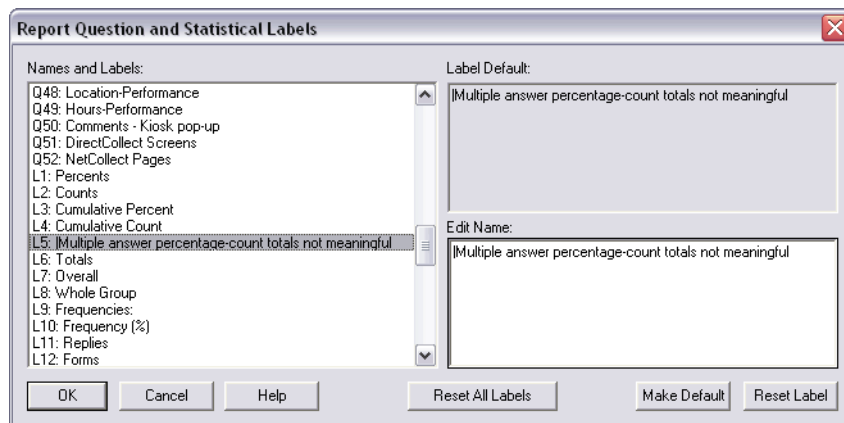
By default, SurveyPro sets the report labels as the first 200 characters of your question text. This can be changed question-by-question in the question or grid dialogs, or for many questions at once using this dialog. These

short names not only appear in figures, they're also used within dialogs to refer to questions, such as the Object Tree and Import dialog.

Once a question name is overridden, it will no longer automatically update when the question text is modified. Be careful of this if you have files which have evolved a great deal over time.

You can also change the labels (indicated with a L number) used for statistical functions, either for translation or preference. Some of the labels include wildcard characters which are substituted for other values, so be very careful to leave these portions intact. (Note, unlike variables you can insert through the text palette, the statistical labels using these wildcards expect a specific function to be present.)

<b>%d</b>	Inserts an integer value in the label, such as for Top Box where it inserts the number of boxes.
<b>%.0f through %.6f</b>	Inserts a decimal value in the label. You can set this from no decimal "3" up to 6 decimal places "3.141593."
<b>%%</b>	Only used immediately after wildcard value such as %.1f. Inserts a "%" symbol in the text.
<b>  "pipe" symbol</b>	For labels which include footnotes, this symbol separates the in-figure label from the note text. An asterisk "*" in the figure referring to the note is inserted automatically.



**Names and Labels**

Lists first the question labels by internal Q number, then the statistical labels.

**Label Defaults**

If a question is selected, displays the full text for your reference. If a statistical label is selected, displays the default, or in this case, both SurveyPro's default and the one you have set as your personal default.

- Edit Name** Type the label text you want to use for the figures. Shorter is generally better.
- Make Default** Sets the statistical label as your personal default for new projects.
- Reset Label** Resets question labels to the first 200 characters of question text, or statistical labels to SurveyPro's default.
- Reset All Questions/Labels** If a question is selected, this resets all question names to their default, the first 200 characters of question text. When you have questions with no visible text, you'll have to manually give them labels before leaving this dialog. Or, if a statistical label is selected, it resets to their defaults.

## Graph Color Fills

By default, SurveyPro comes with a mixed set of graph colors. The initial set may be modified, or you may insert additional sets for specialized applications, such as creating bar charts of all one color when a legend is not needed. Graph fill sets are specified in the Document Properties and in individual figures.

To change the settings, just click on the drop-down lists for each of the 16 items and select from one of the pre-set colors or add a custom color. The Side Color is for shading on 3D pie and bar graphs.

You can repeat colors within the fill definition, and you don't have to set all the custom colors if your figures will not use them.



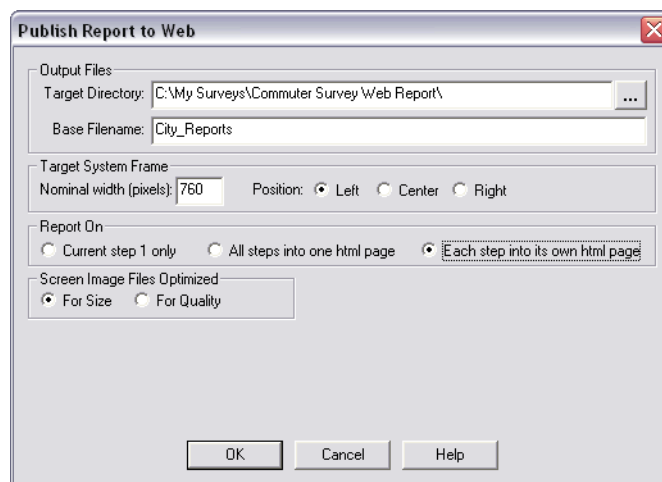
## Publishing Reports

This feature allows you to publish SurveyPro's custom and automatic report documents to either HTML or individual image files. Note that you can also copy and paste individual figure tiles from SurveyPro into other applications.

After each Publish, a log is created with the results. You can retrieve this later through the Tools menu, File History.

## Web HTML Reports

In addition to posting HTML reports on a server, these files can also be opened in Microsoft Word and other applications. If you're conducting Web surveys, see also the *NetCollect User Guide* for the real time server-based reports.



### Target Directory

Set the destination for the HTML pages and image files.

### Base Filename

The individual files exported will add a document number prefix such as “D5” and name suffix to this base filename.

### Target System Frame

760 pixels will fit on an 800x600 SVGA screen without a horizontal scroll bar. For users with larger displays, set whether you want that column to be left, centered, or right aligned within their browser.

### Report On

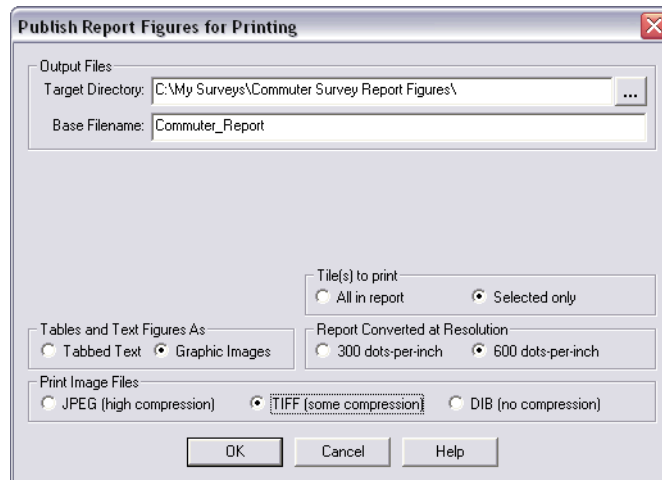
When the document has a Report On Repeat set, you can specify whether you want to save just one “step” or all of them. When you select **Each step into its own HTML page** the step number will be appended to the HTML and image file names.

**Screen Image Files  
Optimized**

Images are exported at screen resolution. This option simply determines whether they're saved as high quality JPEGs or with some compression. If you need higher resolution images, use the Printable Images Publish.

## Printable Images

This is a convenient way to save all your figures to print quality images for use in a page layout or other application.



**Target Directory**

Set the destination for the image and text files.

**Base Filename**

The individual files exported will add a document number such as “D5” and tile number to this base filename.

**Tile(s) to print**

Select either all tiles in the document or just the selected item. Note you can also paste SurveyPro tiles into most applications.

**Tables and Text Figures As**

Tables and text can be saved as editable TXT files, or they can be saved as images just as they display in your SurveyPro document.

**Report Converted at  
Resolution**

Select 300 or 600 DPI for the images.

**Print Image Files**

Select the preferred format of your graphic designer. Only JPEG files should be used on the Web.

SurveyPro is designed to create reports, not just independent figure tiles. This lesson is a complement to *Creating a Questionnaire* on page 91, which uses additional document editing tools in the creation of a questionnaire.

In this tutorial you'll learn how to:

- Insert different figure types
- Create cross-tabulations
- Apply form select filters
- Work with question groups
- Adjust Other groupings and Sorting
- Summarize written answers

### Tutorial Notes


<b>General</b>	You can save your file and take a break any time you're in the main document screen.
<b>Tutorial Files</b>	Are in your <b>SurveyPro Samples</b> folder, by default under: C:\Program Files\Apian Software\SurveyPro 40\

1. Start SurveyPro, log in, and if the window isn't filling the screen, maximize it.
2. **File, Open Report Tutorial.SP4** and save as **YourName Report Tutorial.SP4** when prompted.
3. **Close** File History.


The Hotel Ombreux departure survey was created to help prioritize improvements in the hotel, as well as track changes in the feedback as improvements are implemented.

At the bottom of the screen are tabs for the four starting documents in a file: Questionnaire, Executive Summary, Data Table and Custom Report. The Custom Report is empty, waiting for your content, while the Executive Summary and Data Table are automatically maintained reports which display results as soon as a single form is in the database.

4. Click on the **Questionnaire** tab and take a moment to acquaint yourself with the survey we're going to analyze.
5. Click on the **Executive Summary** tab, and scroll through the report.
6. Click on the **Data Table**, and scroll through the respondent answers.

Both the Executive Summary and Data Table have a few customization controls through their Document Properties dialogs , but they're a subset of the normal reporting tools. So, let's make a custom report!

## Adding a bar graph

1. Click on the **Custom Report** tab.
2. In the toolbar, click the Insert button  and select **Bar Chart** from the drop-down list.
3. In the **For Question(s)** tab, select **Q12: Amenities**.

As you clicked on the question, the section below added a selection: Count writtens into virtual checkboxes. This is available because the amenities question includes an Other blank. SurveyPro assumes you're going to want to count the write-ins as well as pre-loaded checkboxes, so if it finds repeats it will report them in bars just like the original boxes. If you don't want SurveyPro to tabulate the Others, you can always turn the setting back to None.

4. However, in our case, we want the Others counted, so click **Next**.
5. Leave the statistic setting at the top on Frequency
6. Check the box for **With No Answers** to add a bar for missing responses.
7. Click on the **Sorting** drop-down list and change it to **Sort by Frequency**.

Bar and pie charts are among SurveyPro's simplest figures, as you can see from the limited set of statistics active on the screen. This is an unordered scale, so it's even simpler because the options for means, medians, and standard deviations are not applicable (see *Statistics in SurveyPro* on page 207).

The one setting we didn't change, Move counts at or under 1 into Others, is related to the selection we made on the first screen to count written responses.

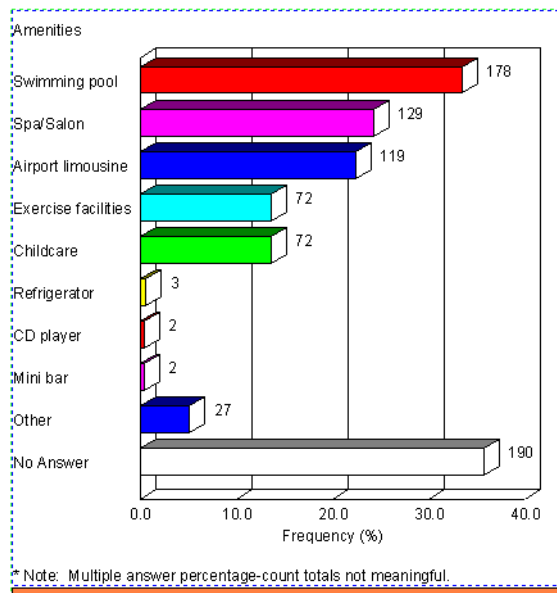
8. Click **Next**, and **Next** again (we'll come back to the crosstab screen).

The Layout screen includes a variety of options, both for the display of the bar and the dimensions of the tile itself.



9. In the upper-right corner, under **Labeling**, turn on **Show Counts**.

10. Click **Finish** to see your chart.



Not bad for a few clicks, and best of all, it will automatically update as new data is received. In order for SurveyPro to tabulate the three repeated write-ins, they had to be entered consistently in the database. See *Data Cleaning* on page 123 and *Working in Answer Entry* on page 132 for more information.

### Adding a crosstab to the bar chart

Let's play some more with the bar chart.

1. Double-click on the bar chart.
2. Click on the **For Statistic** tab, and turn off **With No Answers**.
3. Click on the **By Crosstab/Filter** tab.

A crosstab (A.K.A. cross-tab or cross-tabulation) is simply a breakdown of one question's responses by another. Common examples would be breaking down an opinion poll by region, gender, or political party. Sometimes there's a relationship in the breakdown, and sometimes there isn't. (See also *Crosstabs & Banners* on page 223)

In our case, we're going to look at whether the amenities requested vary based on whether a guest is traveling on business or pleasure.

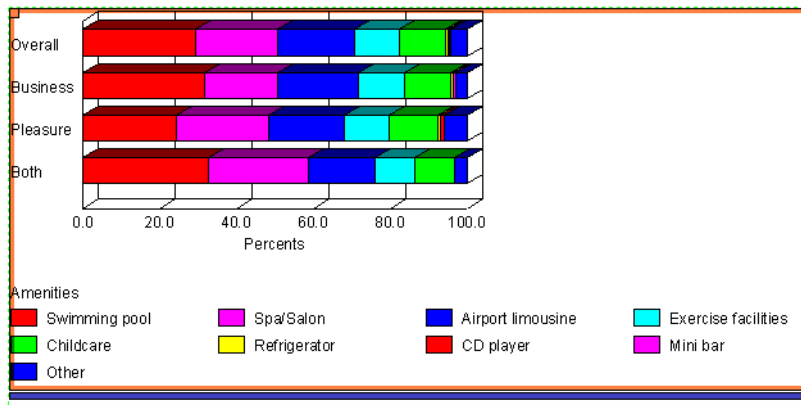
4. Click on the **One Question** radio button at the top.

5. From the list which appeared just below, select **Q13: Trip Purpose**.
6. Near the bottom of the dialog is a setting for **Overall Column**—click to select **First**.
7. Click **OK**.

Well, we now have four charts, one for overall and three for the Trip Purpose answers, but they break across the pages and it's difficult to compare the respondent groups. While we could tighten up the layouts so they're closer together, another approach works better for cross-tabbed bar charts.


8. Double-click on the bar chart again.
9. Click on the **General** tab.
10. Change the figure type to **Stacked Bars** and click **OK**.

Much more concise! Stacked bars and line charts tend to be the best visual representations of cross-tabulations, with tables the winner in detailed data.



## Creating a table of dates

So onward with a table...

1. Click on the blue insert bar beneath the stacked bars.
2. Insert  a **Table**.
3. From the list, select **Q14: Arrival Date**.

Again, some more modifiers appeared based on the question's scale definition. If you have a date question in your survey but didn't see these options, go back to the questionnaire and check your scale.

4. For **Put dates into bins by**, select **Months**.
5. Click **Next**.
6. For the statistics, turn on **Percents**, **Confidence Interval on Frequencies at 95%**, and **Crosstab significance by Chi-Squared**.
7. Click **Next**.
8. Change the **Crosstab By** setting to **One Question** again.
9. Again, let's use **Q13: Trip Purpose**, so select it from the drop-down list.


Here we can take advantage of the additional statistical detail you can display in tables.

10. In the bottom half of the dialog, in the **Show** section, turn on **Counts** and **Percents**.

11. Click **Finish** to see the table.

Since we used the SurveyPro automatic binning for the dates, it will continue to add rows as data is collected. Or, if we just want to look at Q1, we can do so with a Form Select Filter.

## Adding a Form Select Filter

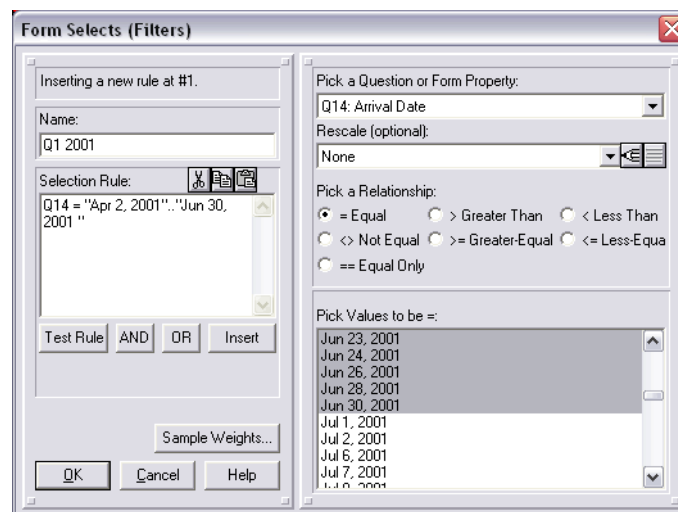
1. Double-click on the table.
2. Click on the **By Crosstab/Filter** tab.
3. At the bottom of the dialog, click the Insert button  next to the **Form Select Filter** drop-down list.

Form Select Filters tell SurveyPro to focus on a sub-set of your database, based on the rules you set up. Rules can be as simple as Q13=1 (the first checkbox), or complex nested filters with nesting, ANDs, and ORs. See page 212.

4. In the upper-left corner, type the filter **Name** Q2 2001.
5. In the question list at the upper-right, select **Q14: Arrival Date**.

Note that at the end of the list are form properties, such as the questionnaire document used and date it was collected, all of which can also be used to look at specific forms in your database.

6. Below the question list is a set of radio buttons for the **Relationship**—select = **Equal**.
7. SurveyPro lists the existing data below, which is a good starting point. Click on Apr 2, 2001, scroll down until you can see Jun 30, 2001, and Shift-click on Jun 30, 2001.
8. You should now see a block of selected values—click the button labeled **Insert** on the left side of the dialog to transfer the rule you specified into the text area.



Note that your settings in the right panel all translate to a text-based rule, which SurveyPro interprets and which you can manually edit. In this case, we do need to make one change because the first date in our database falls after the beginning of the quarter.

9. Click in the typing area on the left side of the dialog and change the rule so it reads Q14 = "Apr 1, 2001".."Jun 30, 2001".

10. Click the **Test Rule** button, and you should see a line appear below the rule box "Found 179 Forms."
11. Click **OK** to return to the table dialog, and note your new rule is already selected in the Form Select drop-down list.


Once a filter is defined, you can apply it anywhere, from Answer Entry searches to other figures to exports. Filters are organized under the Object Tree in the Components section (see page 15). Other reporting components, such as Rescales, Banners, Question Groups and Graph Fills can also be defined once, then applied again and again.

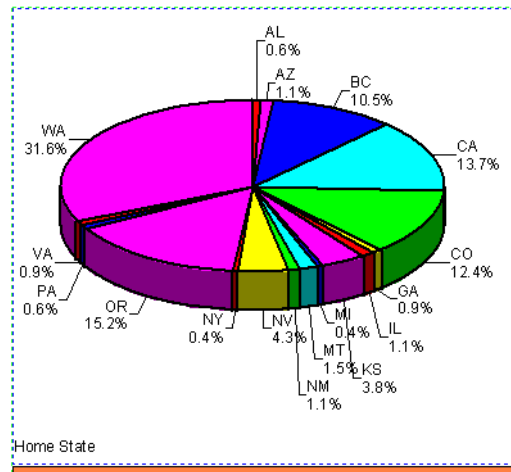
12. Click **OK** to see the revised table.

The last line of the table, Chi Sq Significance, reads "Under 50%." This means that there's a less than 50% chance that the guests' Trip Purpose varies with the date they arrived. Now if the comparison were done across a year, it's possible at trend would be visible for summers and holidays.

If you're interested in exploring tables more, see *Breaking Data Down* on page 268 for a walk-through of its interactions with complex filters, banners, and other settings.

## Using Pie Charts

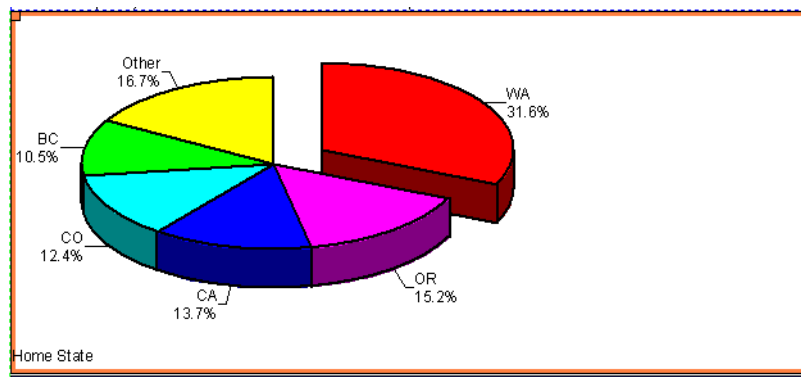
1. Click on the thick blue insertion bar beneath the table, and Insert  a **Pie Chart**.
2. In the first screen, select **Q15: Home State** from the list.
3. Click **Next** twice to reach the **Layout** screen.
4. At the upper-right, in the **Labeling** section, click to select **On Pie Wedges** and **Percents**.
5. Click **Finish** to see the chart.



It's colorful, but if you want the full breakdown a table or bar chart would be better. Let's clean the pie up to the biggest groups.

### Showing only the most common answers

1. Double-click on the pie chart, and click on the **Layout** tab.
2. On the left-hand side is a drop-down list labeled **Sorting**, currently set on Sort Alphabetically. Change this to **Biggest 5**.
3. Just below, click on **Wedge 1** to in the list to select it.
4. Click **OK**.



With the Sorting setting, SurveyPro pulls out the largest segments and groups the rest into an “Other” category. In this case, we end up with a clear regional picture. There's one other way to approach this type of consolidation.

5. Double-click on the pie chart again.

6. Change the **Sorting** drop-down list from Biggest 5 back to **Sort alphabetically**.
7. Just below the drop-down list is a control for **Lump counts at or under 1 as Others**. Change this to 25 and click **OK**.

This setting achieves a similar effect to the Biggest 5, but from a different direction. These controls are available in most figures (though typically on the For Statistics tab), so you can apply them whenever you want to quickly consolidate data. Rescales can also be used to group responses (see page 216).

## Showing question groups in bar graphs

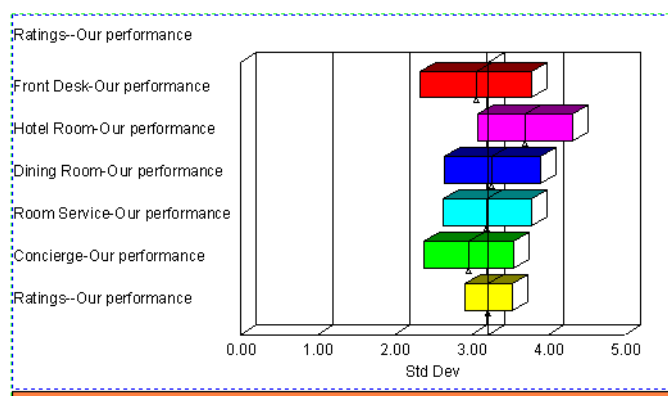
Now we're going to do something with that importance/performance grid from the questionnaire. SurveyPro automatically created a question group for each of our scale columns, so we can get started immediately. (See *Question Groups & Scores* on page 228.)

1. Click on the blue bar below the pie and **Insert a Bar Chart**.
2. In the upper-left, change the setting from A Question to **A Question Group**.
3. Select the group name ending with **Our Performance**.
4. Change the setting on the left to **Components and Whole**.
5. Click **Next**.

Note that when you're looking at a group in this manner you can only choose among statistics which produce a single value per question.

Because the graph will be of the Mean, another set of controls is available at the bottom, which allow you to chart a range around questions.

6. Select **Standard Deviation at 68%** from the lower panel.
7. Click **Next**, and **Finish** to see the bars.

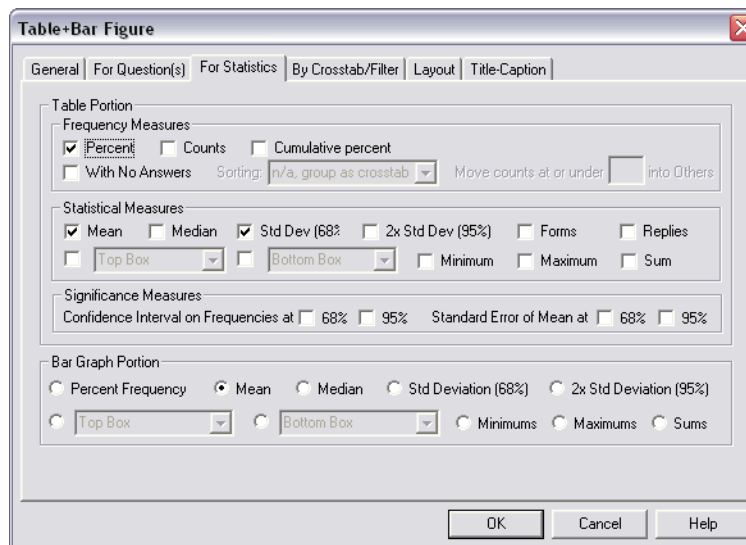


Each bar represents one question in the grid. The vertical line in the middle of each bar is the mean, and the range around it is the standard deviation, the range in which 68% of respondents fell for each question. The axis numbers relate back to the original scale definition, with 4=Very Important, and 1=Unimportant. (Standard deviation is calculated as a symmetrical range, which is why some of the bars go past the maximum possible response of 4.)

Now we're going to make three changes to the figure so we can look at the group's data in another way.

8. Double-click on the bar chart you just inserted.
9. Click on the **General** tab, and change the figure type to **Table + Bars**.
10. Click on the **For Question(s)** tab, and turn on the checkbox for **Use Group like a 'crosstab'**.
11. Click on the **For Statistics** tab, and turn on **Percent** in the top panel.

Note that the dialog is broken into two main sections: one with checkboxes allowing multiple statistics for the table portion, and one with radio buttons for the bar graph statistic.



12. Click **OK**.

Table + Bar figures are handy because you can have the numeric information as well as a graphical representation—in this case the table contains the frequency distribution, mean and standard deviation, while the bars show the mean.

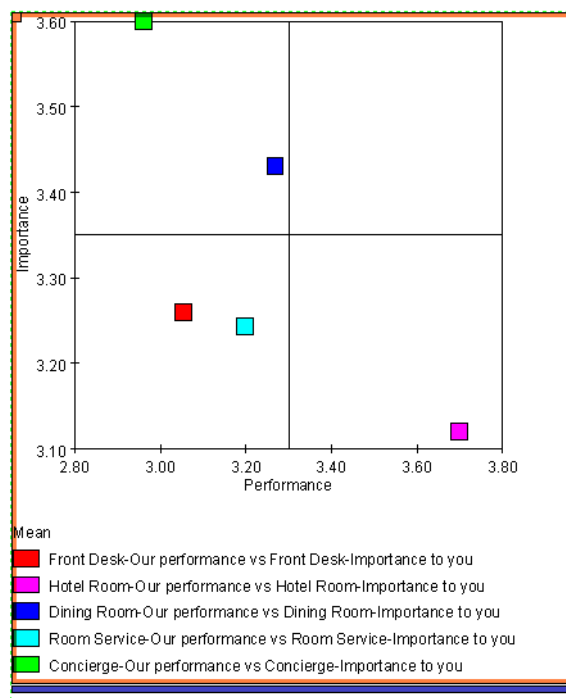


## Scatterplots for pairs of groups

1. Double-click on the group table + bar for one more variation.
2. Click on the **General tab**, and change the figure type to **Compare Group Pairs**—note the tabs changed again to reflect the different feature set of this figure.
3. Click on the **Compare Groups** tab.

Compare groups does just that: compare the results of two related Question Groups. In our case we're comparing the importance and performance ratings from the grid, but it could also be a comparison between two types of respondents on a single Question Group.

4. The left-hand side of the dialog shows the first group, which we've been working with already. On the right side, select **G2: Ratings--Importance** from the **Question Group** drop-down list.
5. At the bottom of the dialog are **Label** settings, one for each side. On the left, type the label Performance, and on the right, Importance.
6. Click the **Layout** tab.
7. Compare groups can take several forms, in this case we want a **X-Y Scatterplot**, so select that as the **Graph Type** in the upper-left corner.
8. Click **OK**.



It looks like our data is very spread out for the different factors, but when we look more closely we see the axes have automatically scaled themselves to fit the data. Let's change them to the scale endpoints instead:

9. Double-click on the scatterplot—you should already be on the **Layout** tab.
10. Change the **Horizontal** and **Vertical** axes from "auto" to a **Start** of 1 and **End** of 4.
11. Click **OK**.

Now there's a much tighter cluster in the quadrant for higher importance and better performance.

On your own projects you might want to tighten up the labels, which can be done either by editing the question grid Report Labels tab (see page 66) or creating custom Question Groups (see page 228).

## Summarizing and cross-tabbing comments

OK, we're down to the last figure for this tutorial: a look at the open-ended comments respondents made.

1. Click on the blue bar at the end and **Insert a Text Figure**.
2. From the Question list, select **Q11: Comments**.
3. Click **Next** twice to get to the **By Crosstab/Filter** screen.
4. Select the radio button for **One Question**.
5. In the list that appeared just below, select **Q13: Trip Purpose**.
6. Click **Finish**.

If this is the last figure in your report, it's just broken across two pages which is a little awkward.

7. Click once on the Text Figure you just inserted and under the **Insert** menu (not the button), select **Breaks**.
8. Click **New Page** and click **OK**.

Comments?

Trip Purpose = Business

- New staff is certainly more upscale, but less friendly than before. Concierge in particular seemed to gravitate toward the suit-clad before tourists.
- Great movie selection for my kids.
- In-room coffee service wasn't restocked one day.
- Please change your housekeeping schedule--9 am is too early even for business travelers.
- Restaurant recommendation by Concierge was outstanding!
- Concierge never produced promised theatre tickets, leaving me dangling with a client at the last minute.

Trip Purpose = Pleasure

- Great mattress and block-out curtains--had a great night's sleep after late nights out!
- Slow checkout--what about an automated system?
- Appreciate the free local and 800# calls--a small thing, but so irritating in hotels which charge.
- My "nonsmoking" room had a horrible lingering smell of cigarettes.
- Front desk took 10 minutes to find my confirmed reservation. Everything else was great though!

Trip Purpose = Both

- I'm a vegetarian, and while I don't require an extensive menu, a properly trained staff who doesn't serve me chicken stock or fish sauce is critical!

And teach your kitchen staff not to slop meat around so it doesn't get in my food again!

That's all there is to creating reports. Of course there's some additional polish to finish it off, such as titles, footers, and figure numbering from the Document Properties dialog (see page 30), but these are the essentials of working with figure tiles. If you got off track at some point, you can open the file **Report Tutorial End.SP4** for a look at the final settings.

*Breaking Data Down* on page 268 has more details on delving into data.





While *Creating a Report* on page 253 introduces the report and figure creation process, this tutorial gets into the tools which help you slice and dice your database. In this lesson we use a table to demonstrate the features, but most of what we do can be applied to any other figure type—tables just happen to be the densest figure type for conveying detailed data.

In this tutorial you'll learn how to:


- Create Rescales for restructuring and rearranging scales
- Use Stub lists to include multiple questions in a figure
- Build complex crosstabs with Banners
- Clone figures to insert many at once
- Replicate entire documents with Report On

### Tutorial Notes

<b>General</b>	You can save your file and take a break any time you're in the main document screen.
<b>Tutorial Files</b>	Are in your <b>SurveyPro Samples</b> folder, by default under: C:\Program Files\Apian Software\SurveyPro 40\

1. Start SurveyPro, log in, and if the window isn't filling the screen, maximize it.
2. **File, Open Report Tutorial.SP4** and save as **YourName Components Tutorial.SP4** when prompted.
3. **Close** File History.
4. If you have not completed *Creating a Report* on page 253, click on the Questionnaire tab at the bottom of the screen and review the survey we'll be analyzing.

### Adding a table of state names



1. Click on the tab at the bottom of the screen for the **Custom Report**.
2. From the toolbar, Insert  a **Table**.

3. From the list at the top of the dialog, select **Q15: Home State**.
4. Click **Next**.
5. In the middle of the dialog, turn on **Percent**.
6. In the center-right, change **Move counts at or under 1 into Others**, to 0.
7. Click **Next**, and **Finish**.

OK, here's the first iteration of the table: an automatic tabulation of the short written answer State. While we could have SurveyPro automatically reduce the table to the most frequent responses as with the pie chart in *Creating a Report*, what about regions?


## Copying and pasting figures

Rather than continuing to edit the same figure, we're going to add a copy so you can see how it evolves and compare settings in your final file.


1. Click on the table to select it, and press the Copy button  in the toolbar or Ctrl+C.
2. Click on the blue bar just below the table, and Paste  with the toolbar or Ctrl+V.

Unlike questions which can remain linked when pasted across documents and may have data linked to a specific tile, pasted figures are independent from the original.

## Adding figure numbers

1. These versions could get confusing, so click on the **Document Properties** toolbar button .
2. Click on the **Autonumber** tab.
3. Select the radio button for **Standard Choices**, and click **OK**.

## Grouping states into regions with a Rescale

1. Now double-click on **Figure 2**, the table at the end.
2. It should open to the **For Question(s)** tab. At the bottom of the screen, change the **Modifiers** setting to **Rescale**.
3. Since we don't have any Rescales in this file yet, click the Insert button  next to the drop-down list that appeared.



Rescales modify the way SurveyPro's reports work with your data, but do not change the underlying responses so you can have many rescales for each scale, applying them in different situations. For example, on this question we could have one rescale which groups respondents based on the distance traveled to the hotel, while another rescale might be based on traditional regions.

Each Rescale is tied to a specific scale type, whether it's written, date, or a specific checkbox scale, and the rescale dialogs are slightly different for each—see *Modifiers & Rescales* on page 216 for more.

4. Leave the first drop-down on **Whole Answers**, and change the second to **Q15: Home State**.
5. Click the **Add** button next to the Home State question.
6. Click in the list below, type TX and click **Add** next to your entry.

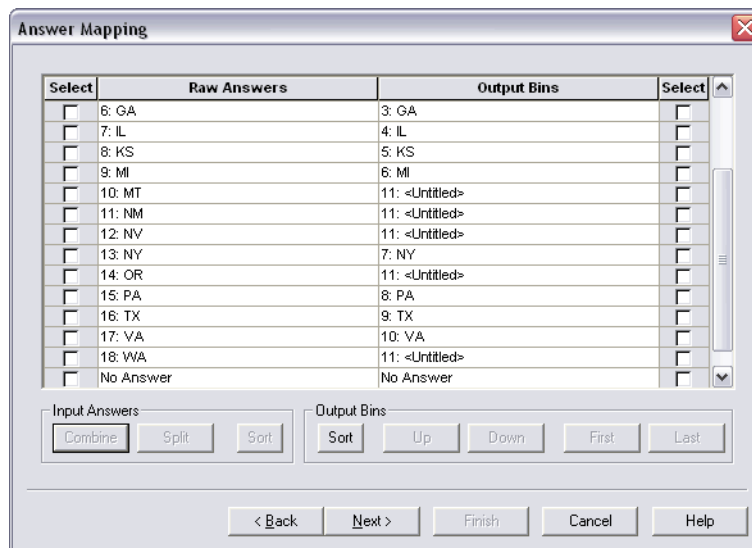
Since we don't have all 50 states represented in the database, this would be the way to add in the gaps. That way when you do collect additional answers in the future, SurveyPro knows how to handle them.

7. Click **Next**.

Now that we have our raw entries, we need to group them into regions. For simplicity, we're just going to use Western, Central, Eastern, and Canada. The next two dialogs are common to all rescale types.

8. In the first column, click on the checkboxes next to:
  - 2: AZ
  - 4: CA
  - 5: CO
  - 10: MT
  - 11: NM
  - 12: NV
  - 14: OR
  - 18: WA
 and click the **Combine** button on the left hand side of the dialog.





Yes, this is the way it's supposed to look. The items you marked are all grouped into one "Output Bin" called 11: <Untitled>. It is a little distracting all broken apart, and since the alphabetical listing on the left means little in this case, we'll clean it up.

9. At the bottom of the dialog are two sets of buttons, one labeled Input Answers and the other Output Bins—click the **Sort** button for the **Output Bins**.
10. Click on the first **11: <Untitled>** (next to AZ).
11. The **First** button on the lower-right should have become active; click it to move this group to the top.

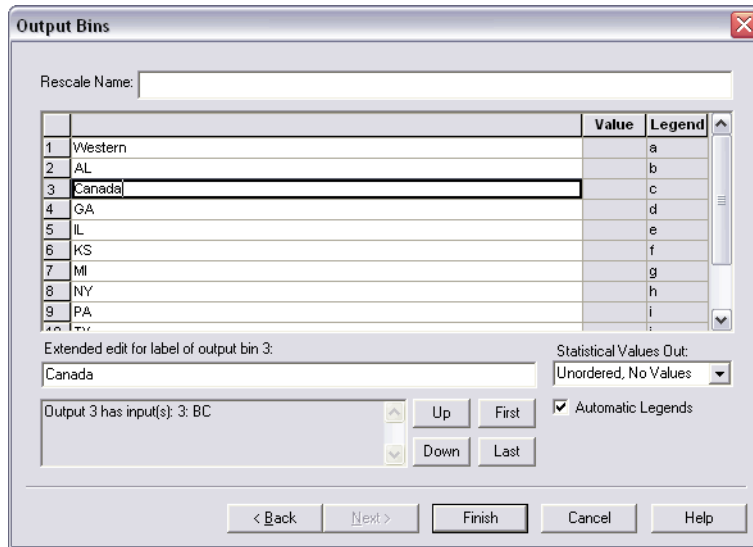
We're going to go back-and-forth a little in this dialog because it's the easiest way to do this type of grouping.

12. Click the **Next** button.
13. Click in the first row and type *Western*.

SurveyPro provides a peek at the contents of each row in the lower-left corner of the dialog—a valuable double-check for more complex Rescales.

Below our new Western group is our lone Canadian, BC. A rescale can be simply a re-labeling of responses, so let's take care of that now.

14. Click in the third row, **BC**.
15. Backspace over the current text and type *Canada*.



16. Click the **Back** button so we can group the remaining states.

17. Now for the central states. In the first column, click on the checkboxes next to:

- 1: AL
- 6: GA
- 7: IL
- 8: KS
- 9: MI
- 16: TX

18. Click **Combine** again, then **Next**.

19. Click in line 6, the row for the new bin, and type Central. Click **Back**.

20. In the first column, click on the checkboxes next to:

- 13: NY
- 15: PA
- 17: VA

and click **Combine**, then **Next** one last time.

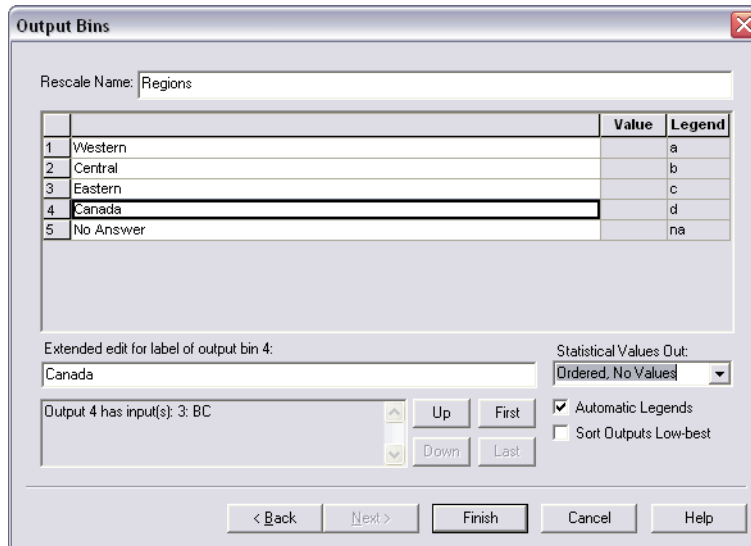
21. For the last group, line 4, type the label Eastern.

22. The Canada group doesn't belong in the middle of the others, so select it and click the **Last** button.

23. At the top of the dialog, type the **Name** for this rescale: Regions.

Rescales with their Output Bins are very similar to checkbox scales. Just like checkbox scales can be unordered or ordered, and have values, so can Rescales.

24. On the lower-right, change **Statistical Values Out** to **Ordered No Values** which will keep this sorted in figures.
25. Check your dialog against the one below.



26. Click **Finish** to save the Rescale, and **OK** to close the figure dialog.

This time the table got a lot smaller, with an understandable distribution for a hotel located in Washington. Let's complicate the table some more.

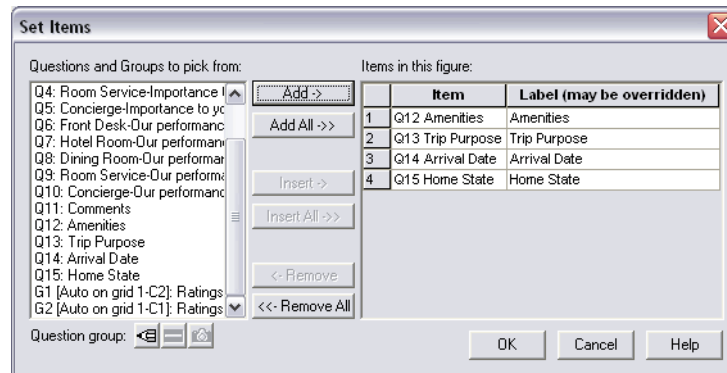
### Using multiple questions in a table

1. Click once on the second table, **Figure 2**, and press the **Copy** button in the toolbar or Ctrl+C.
2. Click on the blue bar just below the table, and **Paste** with the toolbar or Ctrl+V.
3. Double-click on the table at the end, **Figure 3**, to edit.
4. In the **For Question(s)** tab, change the upper-left setting to **Multiple Items (stub list)**.

While question groups produce calculations on the group as a whole, stub lists are a way to create sets of questions which may use completely different statistics. Stubs are only available in tables and text figures, because charts cannot present diverse scale structures.

5. Click the **Edit Item List** button that appeared just below your radio selection.
6. We'll keep this somewhat simple, so scroll down the left-hand list and click on **Q12: Amenities**. Shift+click on **Q15: Home State**.

7. Click the **Add ->** button.

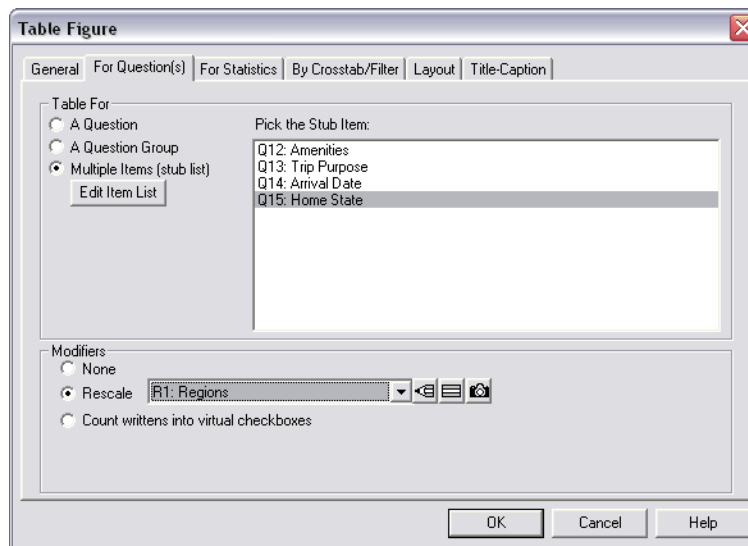


We're saving time setting up these figures because when the question was inserted, a short, clear report label was set. Otherwise, not only would we be overriding labels, we'd be hunting through lists of questions with names like "Q12: When you are..."

8. Click **OK**.

Now instead of a list of questions for the entire project, we have the set of four which will be included in the table.

9. Click through the items in the list and notice that the Modifiers controls at the bottom of the dialog change with the selection.
10. So we don't have a 20 page table, click on **Q14: Arrival Date** and set its **Modifier** to **Months**.
11. Click on **Q15: Home State**, click **Rescale**, and select the one we just added, **R1: Regions**.



12. Click the **For Statistics** tab at the top of the dialog.

Again, we see a list of the stub items because they have very different statistical needs. We could use the “Apply Stats to All” button, and SurveyPro would apply your selections to all the questions for which they were valid, but let’s be a little more specific here.

13. Click on **Q12: Amenities** in the top list.

14. Amenities has an Other blank which we don’t want cluttering the table, so in the center-right of the dialog set **Move counts at or under** to 5.

15. The rest of the settings should be fine for all, so click **OK** to see the table.

## Adding columns with Banners


We’ve expanded the number of questions in the rows, now let’s see what it looks like when we start adding more columns.

1. Scroll up and double-click on **Figure 2**, our short table with the Rescale.
2. Click the **By Crosstab/Filter** tab.
3. Select **One Question**, and from the list that appears, choose **Q1: Front Desk-Importance to you**.
4. Click **OK**.

	Front Desk-Importance to you							
	Unimportant				Very Important			
Home State	81.8%	27	84.4%	54	82.7%	124	81.3%	148
Western								
Central	3.0%	1	3.1%	2	8.0%	12	6.6%	12
Eastern	0.0%	0	1.6%	1	0.7%	1	2.2%	4
Canada	15.2%	5	10.9%	7	8.7%	13	9.9%	18
Totals	100.0%	33	100.0%	64	100.0%	150	100.0%	182


Figure 2:

Simple enough, so let's add a Banner to put more information in the table.

5. With the table still selected, press the **Copy** button in the toolbar or Ctrl+C.
6. **Paste** with the toolbar or Ctrl+V.
7. Double-click on the new **Figure 3**.
8. You should be back in the **By Crosstab/Filter** tab, so change the radio selection at the top to **Banner**.
9. None are defined yet, so click Insert  next to the drop-down list.

Banners are named, reusable column specifications, though a “column” can also be applied to pie charts, stacked bars, etc. Columns can consist of a simple Form Select Filter (July's responses), a 2D crosstab such as the one we just inserted, or a 3D crosstab which compares several customer groups. Each banner item, Filter/2D/3D, can produce one or more columns, as you can see in the 2D crosstab above which produced four columns. Banners may include up to 500 columns, so they should be able to accommodate whatever you need.


Aside from the ability to stack up all these items in a figure, Banners also allow you to override the labeling and set statistics individually for each item, just as we did with the stub list. Since these are saved settings, defining a banner can save you time when you use the same crosstab many times.

10. At the top of the dialog, type the banner **Name** 3D Table.
11. Having a first item as an “overall” is useful, so leave item 1 on Filter only, All Forms.
12. Click the Add button  to insert a row item at the end of the list.
13. With the new item selected, set it to **2D Crosstab** at the lower-left.
14. At the lower-right, select **Q1: Front Desk** from the drop-down list.
15. Click **OK**, and **OK** again to close the figure dialog.

Except for the Overall column (which the simple crosstab can add), the two are identical.

16. Double-click on **Figure 3** again.

17. Click the Modify button  next to the banner selection.

18. Click the Add button  to insert a row item at the end of the list.

19. Set this new item to **3D Crosstab**.

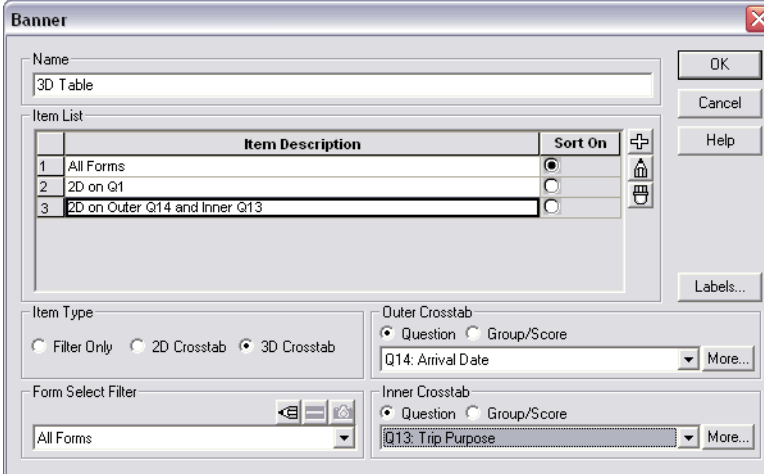
3D crosstabs have an “inner” and “outer” question, with outer being the one on the top of the column heading. You’ll see in a moment. We’re going to compare the respondent’s visit date against their trip purpose.

20. In the lower-right corner, set the **Outer Crosstab** to **Q14: Arrival Date**.

21. Click the **More** button to the right of the question selection.

22. Set the **Modifier** to **Quarters** and click **OK**.

23. Now set the **Inner Crosstab** to **Q13: Trip Purpose**.



	Item Description	Sort On
1	All Forms	<input checked="" type="radio"/>
2	2D on Q1	<input type="radio"/>
3	2D on Outer Q14 and Inner Q13	<input type="radio"/>

24. Click **OK**, and **OK** again to see the table. You’ll have to scroll a little, since it’s wrapping to three lines and breaking across the page.

## Changing table layouts

One option for tables is to use a larger or landscape page layout, sometimes as a separate report document from the rest of the figures. There are also layout options which let you condense a table or change its orientation.

1. In the toolbar, click **Document Properties** .

2. In the **General** tab, click the **Print Setup** button.
3. Change the paper size to **Legal**, with a **Landscape** orientation.
4. Click **OK** twice, and notice the table is still wrapping.
5. Double-click on **Figure 3**.
6. Click on the **Layout** tab.
7. In the upper-right corner, click to turn on **Percents below counts** and **Vertical labels**. Click **OK**.

Finally! Of course if we start adding more columns, maybe we'll have to shrink the font size as well.

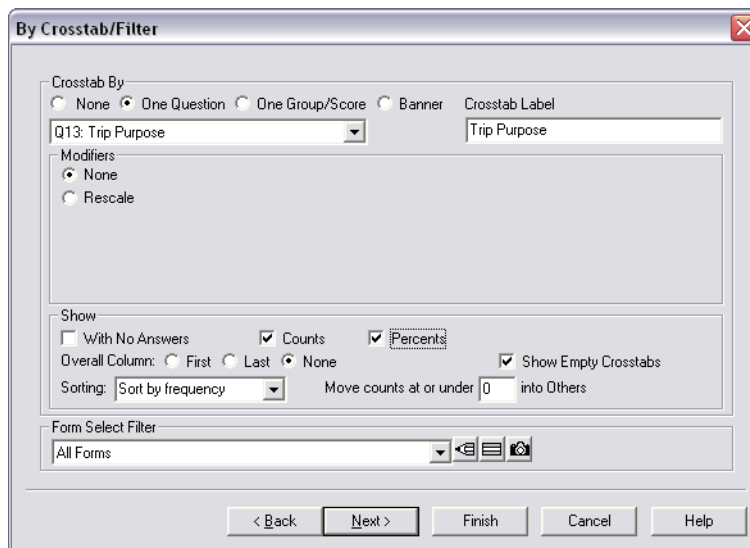
When you look at the table, you'll see the three items: Filter set to All Forms, 2D crosstab, and 3D crosstab. The filter could be any Form Select, and you could have several stacked up. You can also apply filters to the 2D and 3D crosstab items. In the 3D, the "Inside" question Trip Purpose is repeated inside each of responses for the Outer Arrival Date question.

## Cloning figures for a series of questions

Another way to display data for several questions is the Clone Figure command—sometimes this makes it easier to compare results than a single really wide table. First let's create our template figure.

1. Scroll to the bottom of the document and click the blue bar at the bottom.
2. **Insert** another **Table**.
3. Click **Next** twice to reach the **By Crosstab/Filter** screen.
4. Change the selection to **One Question** and pick **Q13: Trip Purpose** from the drop-down list.
5. Turn on **Counts** and **Percents** near the middle of the dialog.





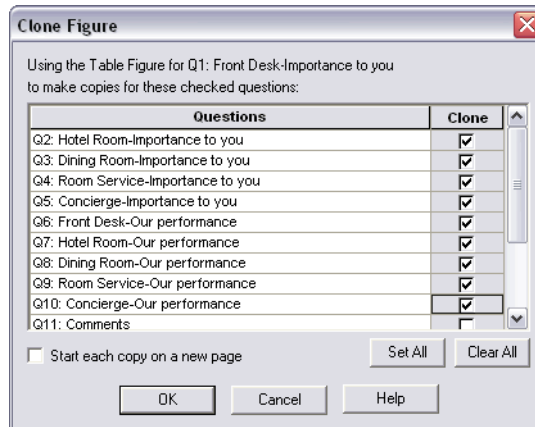
6. Click **Next**.
7. On the left-hand side of the **Layout** screen, click **Gray behind tiles, no lines**.
8. Click **Finish**.

	Trip Purpose		
	Business	Pleasure	Both
	56.1%, 291	33.9%, 176	10.0%, 52
Front Desk-Importance to you			
Unimportant	5	33	2
	19	36	16
	98	45	23
Very Important	135	47	11
Totals	257	161	52
Mean	3.41	2.66	2.83

Figure 5:

Now for the cloning:

9. Click once on **Figure 5** to select it.
10. Under the **Insert** menu (not the button), select **Clone Figures**.
11. Every question except the one used in the For Question tab is listed. In the **Clone** column, click on the remaining grid questions, **Q2-Q10**.



12. Click **OK**, and **OK** again at the confirmation for 9 figures.

Of course you could do this with copy/paste and editing the new version, as we did earlier, but this is the fastest way to replicate figures.

## Using Report On to filter and replicate reports

There's one more tool in this lesson, and it applies to an entire document, not just one figure: Report On. Report On acts like a filter or crosstab at the document level. Common applications include creating quarterly or divisional breakdowns, as well as employee 360 surveys.

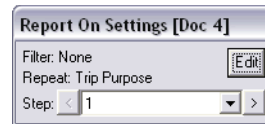
1. The changes are easiest to see graphically, so scroll to the top of the report and double-click on **Figure 1**.
2. Click on the **General** tab, and change the figure type to **Table + Bars**.
3. Click on the **For Question(s)** tab, and at the bottom change the **Modifiers** setting to **Rescale**. Select **R1: Regions** from the list.
4. Click **OK**.
5. Under the **Document** menu, select **Report On**.

There are two panels, for filter and repeat, which can be used separately or together. Since filters we've touched on filters in other tutorials, we'll skip ahead to a repeat.

6. Click on the box for **Apply Repeat**.

The first option is whether you want this to be a global setting or only impact figures using a special Form Select called Report On Selection. Using the second setting is a great way to embed a database-wide Overall column in a table, while the rest of the columns vary with the Report On setting.

7. Leave the Step Using setting on Question, and select **Q13: Trip Purpose** from the list.
8. Click **Show Overall**, and **OK**.



A little navigation palette popped up, which allows you to scroll through the report views which were just created. These are just views of one document, and that if you edit a figure in one of the views it will ripple to all.

9. Click Forward and Back through the steps, and note the changes to the bar lengths and counts as you do so.
10. Scroll down until you can see Figure 3, the Banner table, and note the columns disappearing on all but step one (the Overall).

That's it for this lesson, though the features we used can be applied and combined in many other ways as well. If you are done playing with the reports, exit SurveyPro. There's a copy of the finished lesson file called **Components Tutorial End.SP4** in the SurveyPro Samples folder for your reference.

# Appendix A

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