

Survey Crafter Walkthrough

Summary:	Using Survey Crafter Professional to enter data for a paper or telephone survey on one or more data entry workstations
Walkthrough:	SCWT-SCP350-0522901
Applies to:	Survey Crafter Professional 3.5 or later
Topic:	Paper and Telephone Surveys
Last Updated:	Friday, August 19, 2005
More Info:	Click here for more walkthroughs

Synopsis

This walkthrough describes a procedure for using Survey Crafter Professional to enter data for a paper or telephone survey on one or more data entry workstations.

Please note it is *not* necessary to use this procedure if you intend to use *one* installation of Survey Crafter Professional to both design and enter all of the data for a paper or telephone survey.

Briefly, the procedure has you do the following:

1. Install Survey Crafter Professional on the computer you want to use to design your survey. This computer will be referred to as the master computer. Do not use the master computer to enter data for your survey.
 2. Install Survey Crafter Professional on the computers you want to use to enter data for your survey. These computers will be referred to as the data entry computers.
 3. Configure Survey Crafter Professional on the data entry computers to only allow data entry.
 4. Design and test your survey on the master computer.
 5. Make a copy of your survey's study file for each data entry computer.
 6. Show people how to use Survey Crafter Professional to enter data for your survey.
 7. Have people enter data for your survey on the data entry computers.
 8. Periodically export the records from each data entry computer.
 9. Import the records from the exported data files into the study file on the master computer.
 10. Repeat steps 7 through 9 until data entry is complete.
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Notes

The instructions assume you are using Survey Crafter Professional 3.5 or later. To determine what version of Survey Crafter Professional you are using, choose *About Survey Crafter Professional* from Survey Crafter Professional's *Help* menu.

Please note you do *not* need to purchase additional licensed copies to install Survey Crafter Professional on additional computers for data entry only.

Walkthrough

Step 1

Install Survey Crafter Professional on the computer you want to use to design your survey. This computer will be referred to as the master computer.

To simplify importing records from data files exported from the data entry computers, do not use the master computer to enter data for your survey.

To install Survey Crafter Professional, refer to the back of the Survey Crafter Professional CD sleeve or use the instructions provided by the order confirmation or evaluation e-mail.

Survey Crafter Professional has the following minimum system requirements:

- A Personal Computer (PC) running Microsoft® Windows® 95 with DCOM95 1.3 or later, 98, Me, NT 4.0 SP3 or later, 2000, or XP.
- 64 MB RAM
- 40 MB of available hard disk space
- VGA or higher resolution monitor
- Compact disc drive (installation only)

Step 2

Install Survey Crafter Professional on the computers you want to use to enter data for your survey. These computers will be referred to as the data entry computers.

To install Survey Crafter Professional, refer to the back of the Survey Crafter Professional CD sleeve or use the instructions provided by the order confirmation or evaluation e-mail.

Survey Crafter Professional has the following minimum system requirements:

- A Personal Computer (PC) running Microsoft® Windows® 95 with DCOM95 1.3 or later, 98, Me, NT 4.0 SP3 or later, 2000, or XP.
- 64 MB RAM
- 40 MB of available hard disk space
- VGA or higher resolution monitor
- Compact disc drive (installation only)

Step 3

Configure Survey Crafter Professional on the data entry computers to only allow data entry.

Refer to the walkthrough SCWT-SCP310-0407801 "Configuring an installation of Survey Crafter Professional for data entry only". To read the walkthrough online, visit <http://www.surveycrafter.com/interim2/walkthru.asp>

Step 4

Design and test your survey on the master computer.

If you have not yet used Survey Crafter Professional to design a survey, refer to the following demonstrations, guides and walkthroughs:

Reference	How to Find it
Survey Crafter Professional Quick Preview	Click on the <i>Quick Preview</i> button on Survey Crafter Professional's <i>Welcome</i> dialog box or choose <i>Quick Preview</i> from Survey Crafter Professional's <i>Help</i> menu. Alternatively, to download and install the Quick Preview, visit http://www.surveycrafter.com/interim2/downloads.asp .
<i>Getting Started Guide</i>	Choose <i>Getting Started Guide</i> from Survey Crafter Professional's <i>Help</i> menu. Alternatively, to read the <i>Getting Started Guide</i> online, visit http://www.surveycrafter.com/interim2/books.asp .
<i>User's Guide</i>	Choose <i>User's Guide</i> from Survey Crafter Professional's <i>Help</i> menu. Alternatively, to read the <i>User's Guide</i> online, visit http://www.surveycrafter.com/interim2/books.asp .
Tutorial	To read the tutorial online, visit http://www.surveycrafter.com/interim2/walkthru.asp .

To test your survey, do the following:

- 4.1. Start Survey Crafter Professional.
- 4.2. Open your survey's study file and click the *OK* button on the *Tip of the Day* dialog box. Survey Crafter Professional displays the *Study* window.
- 4.3. Click on the *Data* tab of the *Study* window.

Survey Crafter Professional displays the *Data* tab of the *Study* window.

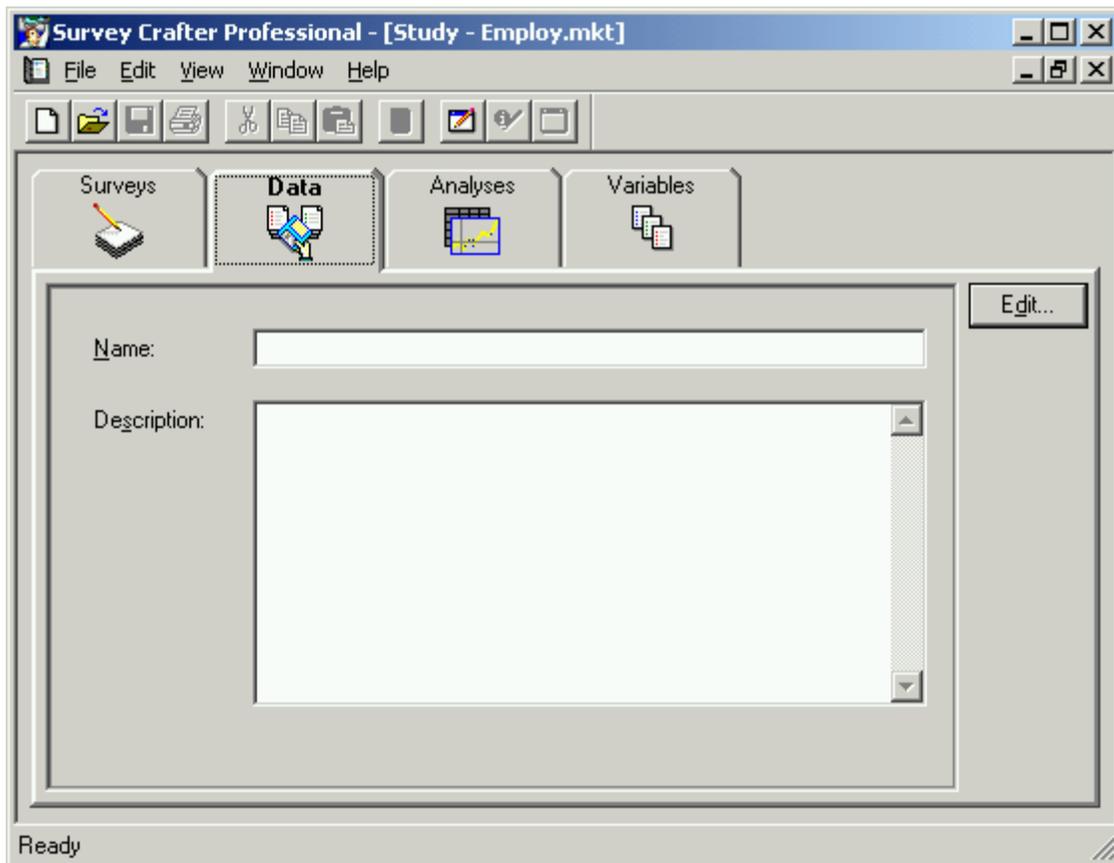


Figure 1: The *Data* tab of Survey Crafter Professional's *Study* window
4.4. Click on the *Edit* button on the *Data* tab.

Survey Crafter Professional displays the *Data* window.

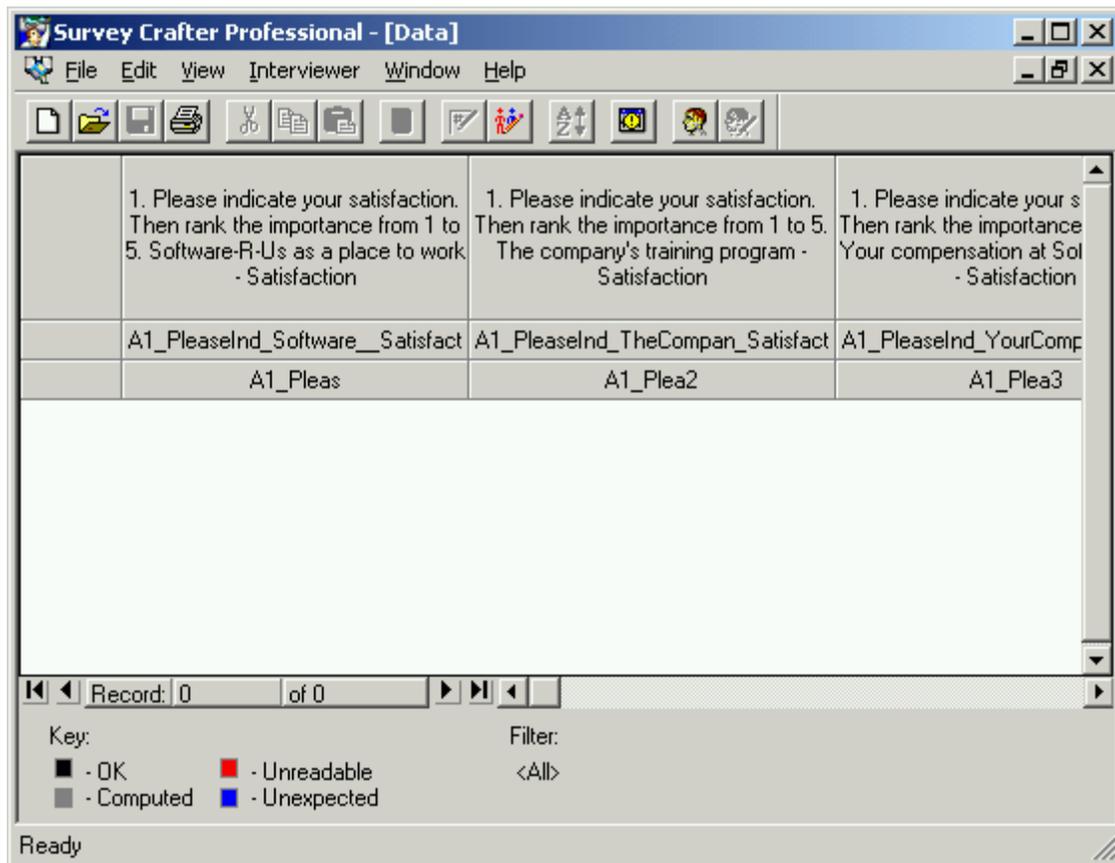


Figure 2: Survey Crafter Professional's *Data* window

4.5. Choose *Options* from Survey Crafter Professional's *Interviewer* menu.

Survey Crafter Professional displays the *Interviewer Options* dialog box.

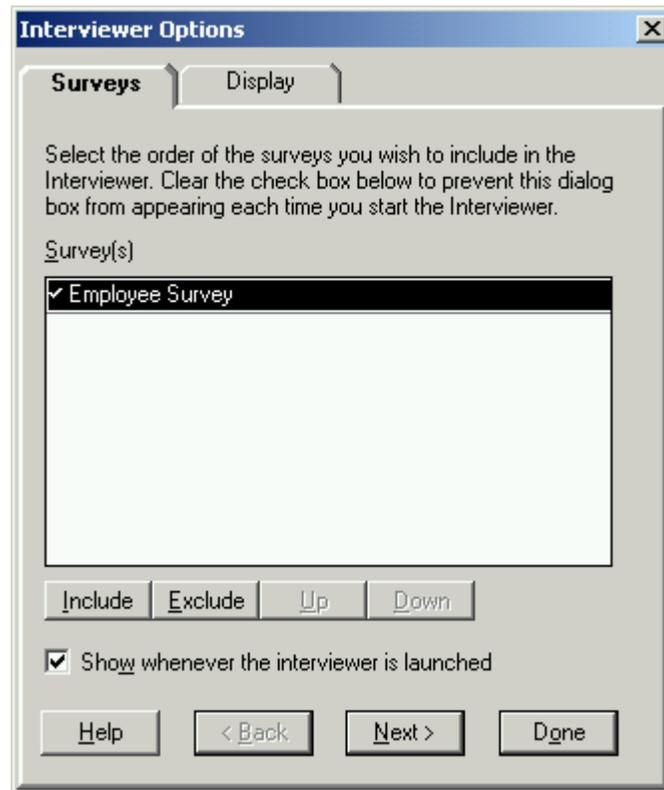


Figure 3: The *Surveys* tab of the *Interviewer Options* dialog box

4.6. Review the settings on the *Surveys* tab of the *Interviewer Options* dialog box.

For example, make sure each survey you want to appear in the built-in Interviewer has a check mark to its left.

4.7. Click on the *Next* button.

Survey Crafter Professional displays the *Display* tab of the *Interviewer Options* dialog box.

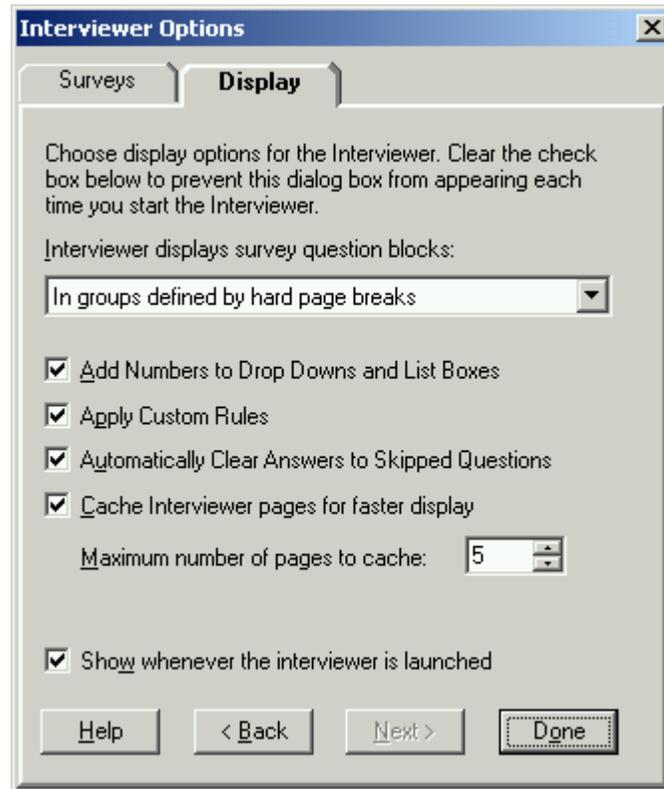


Figure 4: The *Display* tab of the *Interviewer Options* dialog box

- 4.8. Review the settings on the *Display* tab of the *Interviewer Options* dialog box.
To read about these settings, click on the *Help* button or press the *F1* key.
If your survey is more than 5 pages long, increase the number to the right of *Maximum number of pages to cache* to match your survey's page count.
- 4.9. Click to clear the check box labeled *Show whenever the interviewer is launched*.
This prevents Survey Crafter Professional from showing this dialog box each time the built-in Interviewer is started.
- 4.10. Click on the *Done* button on the *Interviewer Options* dialog box.
- 4.11. Save your survey's study file by choosing *Save* from Survey Crafter Professional's *File* menu or by clicking on the *Save* toolbar button on Survey Crafter Professional's toolbar.
- 4.12. Choose *New Respondent* from Survey Crafter Professional's *Interviewer* menu or click on the *New Respondent* button on Survey Crafter Professional's toolbar.

Survey Crafter Professional displays the built-in *Interviewer* dialog box.

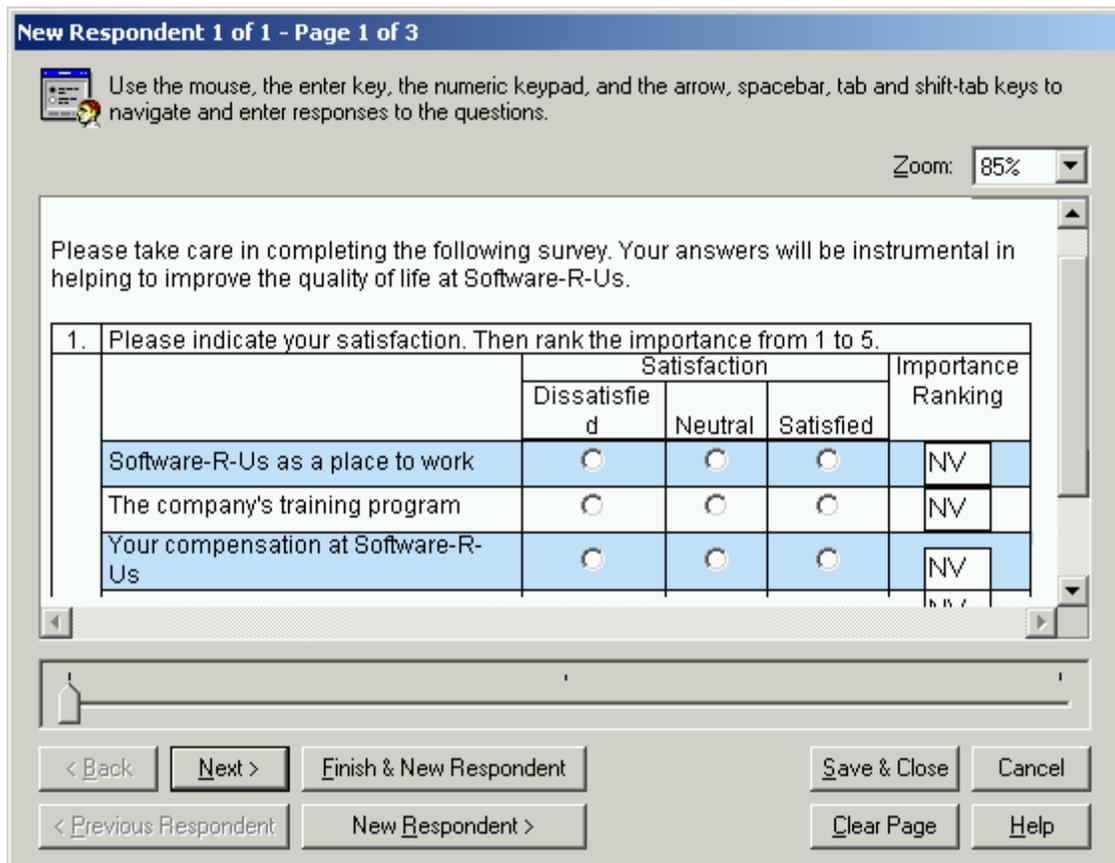


Figure 5: Survey Crafter Professional's built-in *Interviewer*

4.13. Test your survey in the built-in *Interviewer*.

For example, verify that the instructions in your survey are correct, required questions are in fact required, questions are skipped appropriately, etc.

4.14. Click on the *Cancel* button on the *Interviewer* dialog box and then click on the *Yes* button.

4.15. If you encountered any problems testing your survey, make changes to your survey in Survey Crafter Professional's *Survey Designer* window and then test your survey again. Continue testing until your survey is ready for data entry.

It is easier for Survey Crafter Professional to synchronize the properties of the variables associated with your survey's question blocks when there are no records in the *Data* window and also when there are no analysis tables and charts in the *Analyses* tab of the *Study* window. Having records in the *Data* window or having analysis tables and charts limits Survey Crafter Professional's ability to synchronize the properties of the variables associated with the question blocks that you change.

If the records in the *Data* window were created for testing purposes, it is recommended that you remove the records before you make your changes in the *Survey Designer* window. To remove the records in the *Data* window, click on the top left corner of the spreadsheet, press the *Del* key and click on the *Yes* button.

Similarly, if the analysis tables and charts in the *Analyses* tab of the *Study* window were created for testing purposes, it is recommended that you remove those analysis tables and charts before you make your changes in the *Survey Designer* window. To remove an analysis table or chart in the *Analyses* tab of the *Study* window, click on the analysis table or chart, press the *Del* key and then click on the *Yes* button.

- 4.16. If you want to have your data entry computers start with no records, remove all of the records in the *Data* window.

To remove all of the records in the *Data* window, click on the top left corner of the spreadsheet, press the *Del* key and click on the *Yes* button.

- 4.17. Save your survey's study file by choosing *Save* from Survey Crafter Professional's *File* menu or by clicking on the *Save* toolbar button on Survey Crafter Professional's toolbar.
- 4.18. Close Survey Crafter Professional.

Step 5

Make a copy of your survey's study file for each data entry computer.

If you want, you can use *Windows Explorer* to make copies of your survey's study file. However, if you are not familiar with *Windows Explorer* or you want each copy of the study file to contain a different set of data records, use Survey Crafter Professional instead.

If you decide to use *Windows Explorer* to make copies of your survey's study file, please note it is recommended that you use a naming convention for the copies that includes the name of the master study file, the version of the survey, the fact that the copy is for data entry, and the number of the computer.

For example, suppose your master study file is *New Product.mkt*. You could name the copy for data entry computer #1 *New Product-V1-Data Entry-01.mkt*. Following the pattern, you would name the copy for data entry computer #2 *New Product-V1-Data Entry-02.mkt*, and so on.

To use Survey Crafter Professional to make a copies of your survey's study file, do the following:

- 5.1. Start Survey Crafter Professional.
- 5.2. Open your survey's study file.
- 5.3. Click on the *Data* tab of the *Study* window.

Survey Crafter Professional displays the *Data* tab of the *Study* window.

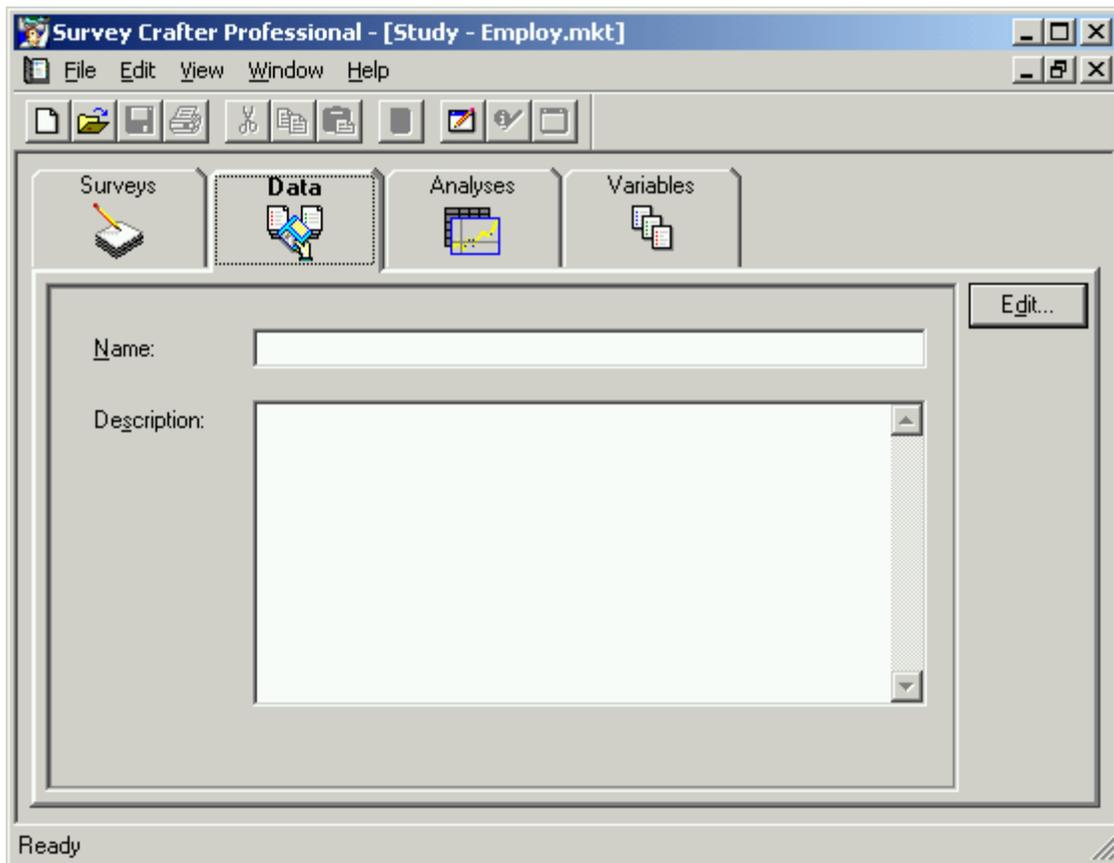


Figure 6: The *Data* tab of Survey Crafter Professional's *Study* window

5.4. Click on the *Edit* button on the *Data* tab.

Survey Crafter Professional displays the *Data* window.

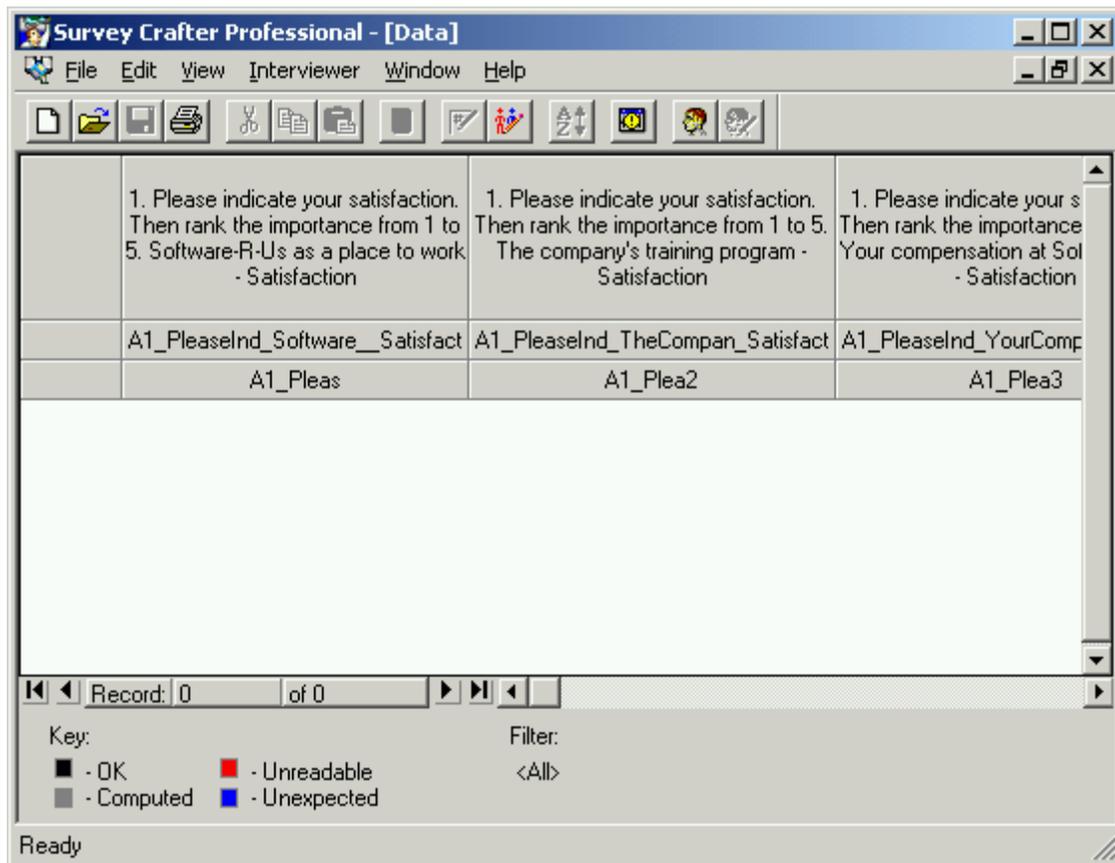


Figure 7: Survey Crafter Professional's *Data* window

5.5. If you want the copies you make for the data entry computers to initially contain no data records, remove all of the records in the *Data* window.

To remove all of the records in the *Data* window, click on the top left corner of the spreadsheet, press the Del key and click on the Yes button.

5.6. If you want each copy to have a different set of records, contact Survey Crafter technical support by e-mail at support@surveycrafter.com or by telephone at (US) 978.635.1717 for advice and/or instructions.

5.7. Choose *Save As* from Survey Crafter Professional's *File* menu.

Survey Crafter Professional displays the *Save As* dialog box.

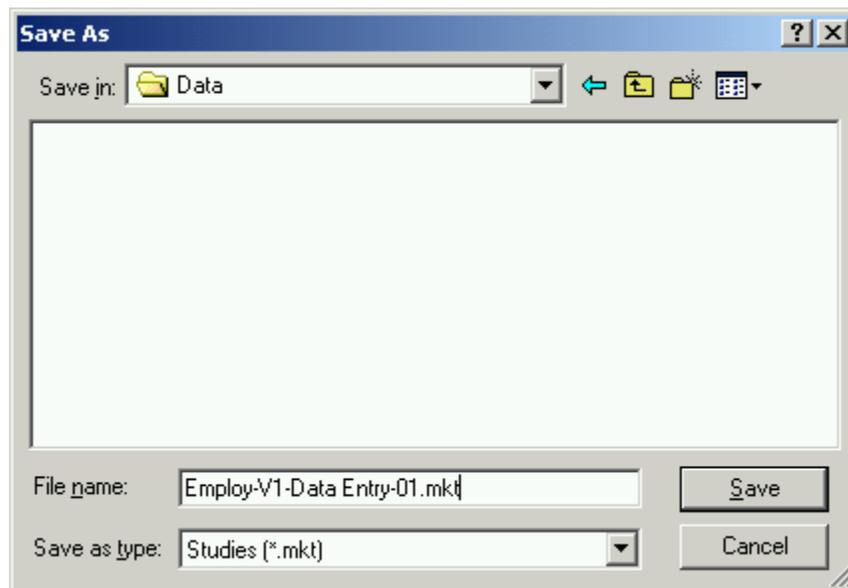


Figure 8: The *Save As* dialog box

- 5.8. Use the *Save in* drop down to navigate to a location on your computer or on your network where you want to save the copy for data entry computer #1. You may need to consult with your network systems administrator to determine where you can save the copy of the study file. The most convenient location is a folder on your network that all of the data entry computers can access.
- 5.9. Enter the name of the copy for data entry computer #1 in the *File name* box.

It is recommended that you use a naming convention for the copy that includes the name of the master study file, the version of the survey, the fact that the copy is for data entry, and the number of the computer.

For example, suppose your master study file is *Employ.mkt*. You could name the copy for data entry computer #1 *Employ-V1-Data Entry-01.mkt*. Following the pattern, you would name the copy for data entry computer #2 *Employ-V1-Data Entry-02.mkt*, and so on.
- 5.10. Click on the *Save* button on the *Save As* dialog box.
- 5.11. Repeat steps 5.6 or 5.7 through 5.10 for data entry computer #2. Repeat these steps until you have made copies for all of the data entry computers.
- 5.12. Close Survey Crafter Professional.
- 5.13. If the data entry computers cannot access the folder to which you saved the copies of the study file, you will need to copy or move the files to folders that the data entry computers can access.

Your network systems administrator may need to perform this task.
- 5.14. To make it easier to start Survey Crafter Professional on the data entry computers, place a short-cut to the appropriate study file on each data entry computer's desktop.

People working on the data entry computers will be able to double-click on the study file on the desktop to start Survey Crafter Professional.

Step 6

Show people how to use Survey Crafter Professional to enter data for your survey.

Consider adding the following or variations of the following to your instructions:

- To start Survey Crafter Professional, double-click on the survey's study file on the data entry computer's desktop and then click on the *Edit* button on the *Data* tab of the *Study* window. This instruction assumes you have placed a short-cut to the data entry computer's study file on the desktop and that you have configured Survey Crafter Professional to only allow data entry.
- To add new data records, click on the *New Respondent* button on Survey Crafter Professional's toolbar.
- To edit the records for respondents already listed in the *Data* window, click on the top left corner of the *Data* window's spreadsheet and then click on the *Edit Respondent* button on Survey Crafter Professional's toolbar. This instruction has Survey Crafter Professional start the built-in *Interviewer* with all of the records in the *Data* window.
- You can resize the built-in *Interviewer*'s window by dragging the border of the window or by double-clicking on the window's caption. Survey Crafter Professional remembers the position, size and zoom settings and displays the window at the same location the next time you start the *Interviewer*.
- To prevent loss of data in case of a power outage, after entering 10 or 20 records in the *Interviewer*, click on the *Save & Close* button on the *Interviewer* dialog box and then click on the *Save* button on Survey Crafter Professional's toolbar. Clicking on the *Save & Close* button on the *Interviewer* dialog box saves the records to the *Data* window. Clicking on the *Save* button on Survey Crafter Professional's toolbar saves the records in the *Data* window to disk.
- Before closing Survey Crafter Professional, always click on the *Save* button on Survey Crafter Professional's toolbar.
- You can use the numeric keypad to enter data in the *Interviewer*. For example, pressing 1 on the numeric keypad causes Survey Crafter Professional to choose the 1st prompt on a closed-end or rating question. Pressing the *Enter* key causes Survey Crafter Professional to advance to the next question.
- You can use the mouse to enter data in the *Interviewer*. For example, you can click on a radio button to choose the corresponding prompt for a closed-end or rating question. You can also right-click on a radio button to unselect the prompt.
- You can use the mouse wheel to scroll the window inside the *Interviewer*.

Step 7

Have people enter data for your survey on the data entry computers.

Since each data entry computer uses its own copy of your survey's study file, data entry can happen simultaneously.

Step 8

Periodically export the records from each data entry computer.

To export the records from each data entry computer, do the following:

8.1. Go to a data entry computer and double-click on the copy of the study file on the desktop.

Survey Crafter Professional opens the study file and displays the *Data* tab of the *Study* window.

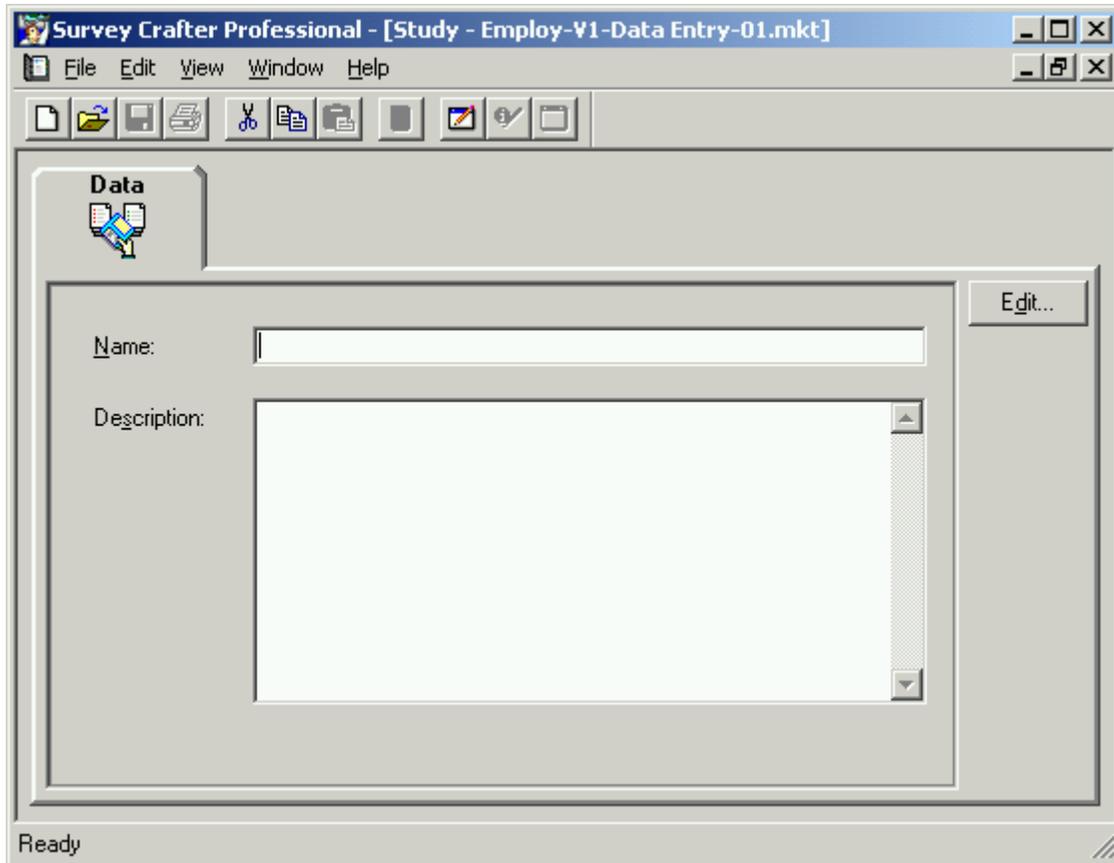


Figure 9: The *Data* tab of Survey Crafter Professional's *Study* window

8.2. Click on the *Edit* button on the *Data* tab of the *Study* window.

Survey Crafter Professional displays the *Data* window.

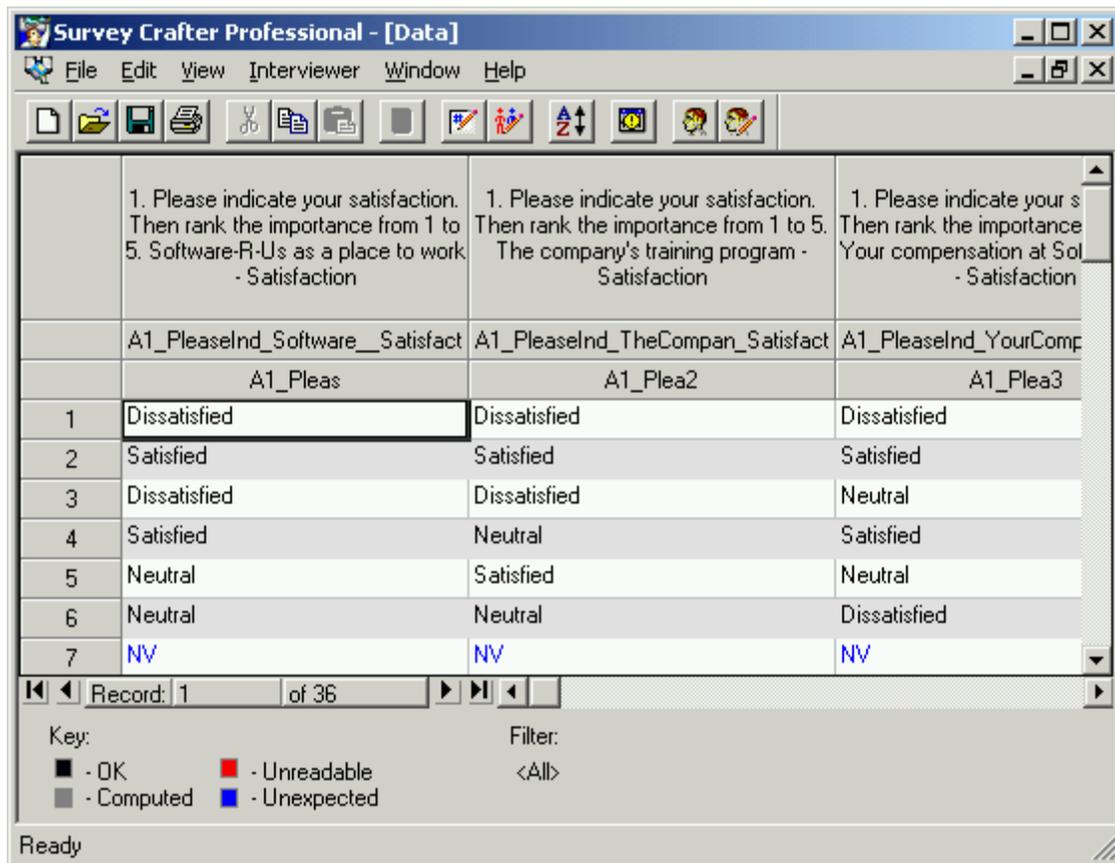


Figure 10: Survey Crafter Professional's *Data* window

8.3. Choose *Export* from Survey Crafter Professional's *File* menu.

Survey Crafter Professional displays the *Save Data File As* dialog box.

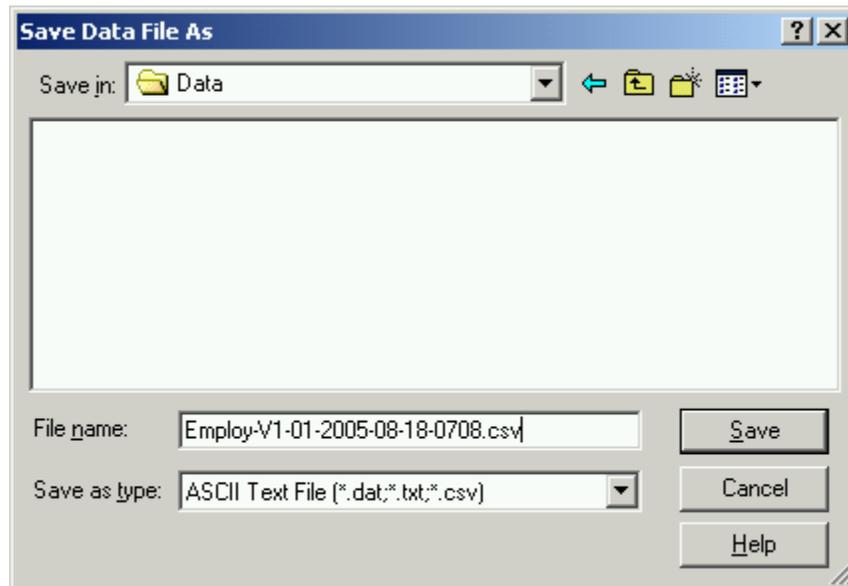


Figure 11: The *Save Data File As* dialog box

- 8.4. Use the *Save in* drop down to navigate to a location on your computer or on your network where you want to save the records for the data entry computer.

You may need to consult with your network systems administrator to determine where you can save the data file. The most convenient location is a folder on your network that the master computer can access.

- 8.5. Enter the name of the data file for the data entry computer in the *File name* box.

It is recommended that you use a naming convention for the data file that includes the name of the master study file, the version of the survey, the number of the computer, and the current date and time.

For example, suppose your master study file is *Employ.mkt*. You could name the data file for data entry computer #1 *Employ-V1-01-2005-08-18-0708.csv*. Following the pattern, you would name the exported data file for data entry computer #2 *Employ-V1-02-2005-08-18-0710.csv*, and so on.

- 8.6. Click on the *Save* button on the *Save Data File As* dialog box.

Survey Crafter Professional displays the *Export Summary* dialog box.



Figure 12: The *Export Summary* dialog box

8.7. Verify that there are 0 variable(s) not selected.

If there are one or more variables *not* selected, click on the *More* button. Survey Crafter Professional expands the *Export Summary* dialog box.

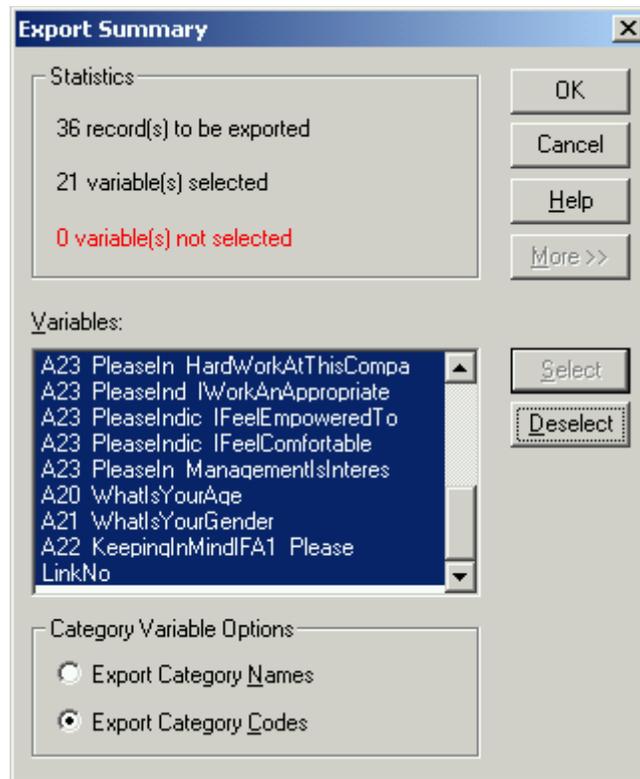


Figure 13: The expanded *Export Summary* dialog box

Use the mouse to highlight all of the variables and click on the *Select* button.

8.8. If there are 0 variable(s) not selected, click on the *OK* button.

Survey Crafter Professional exports the records in the *Data* window to the data file.



Figure 14: A Survey Crafter Professional notification dialog box

8.9. Click on the *OK* button.

8.10. Click on the *Save* button on Survey Crafter Professional's toolbar.

8.11. If data entry is finished for the day for the computer, close Survey Crafter Professional.

8.12. Repeat these steps for the next data entry computer. Repeat these steps until you have exported the records from all of the data entry computers.

Step 9

Import the records from the exported data files into the study file on the master computer.

To import the records from the exported data files, do the following:

- 9.1. Start Survey Crafter Professional on the master computer.
- 9.1. Open your survey's study file and click on the *OK* button on the *Tip of the Day* dialog box.
Survey Crafter Professional displays the *Study* window.
- 9.2. Click on the *Data* tab of the *Study* window.
Survey Crafter Professional displays the *Data* tab of the *Study* window.

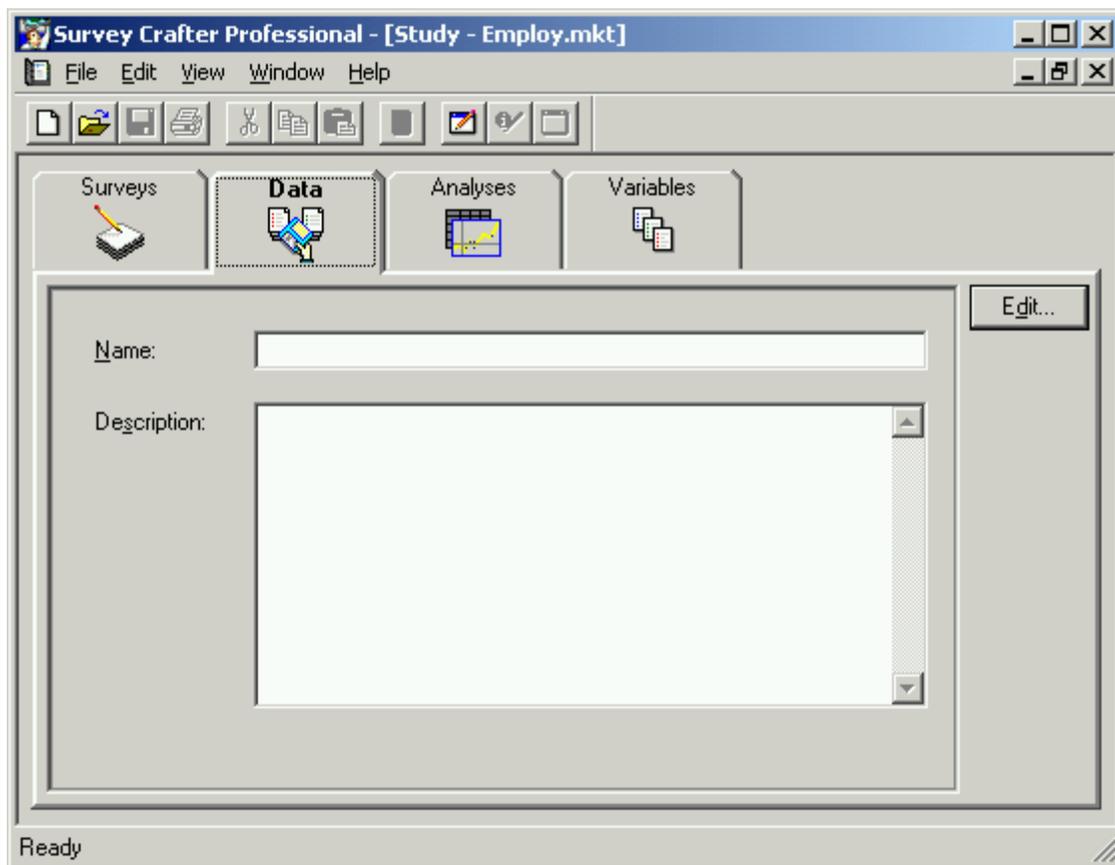


Figure 15: The *Data* tab of Survey Crafter Professional's *Study* window

- 9.3. Click on the *Edit* button on the *Data* tab of the *Study* window.

Survey Crafter Professional displays the *Data* window.

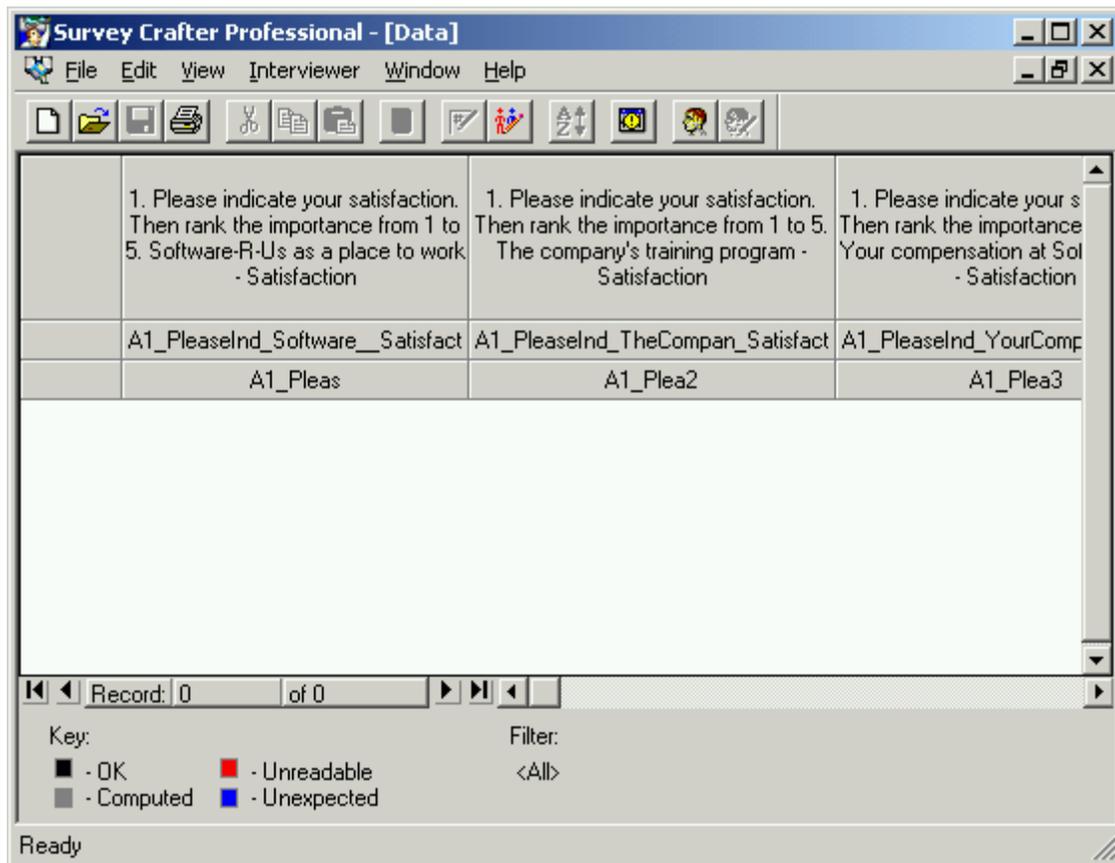


Figure 16: Survey Crafter Professional's *Data* window

9.4. Choose *Import* from Survey Crafter Professional's *File* menu.

Survey Crafter Professional displays the *Open Import File* dialog box.

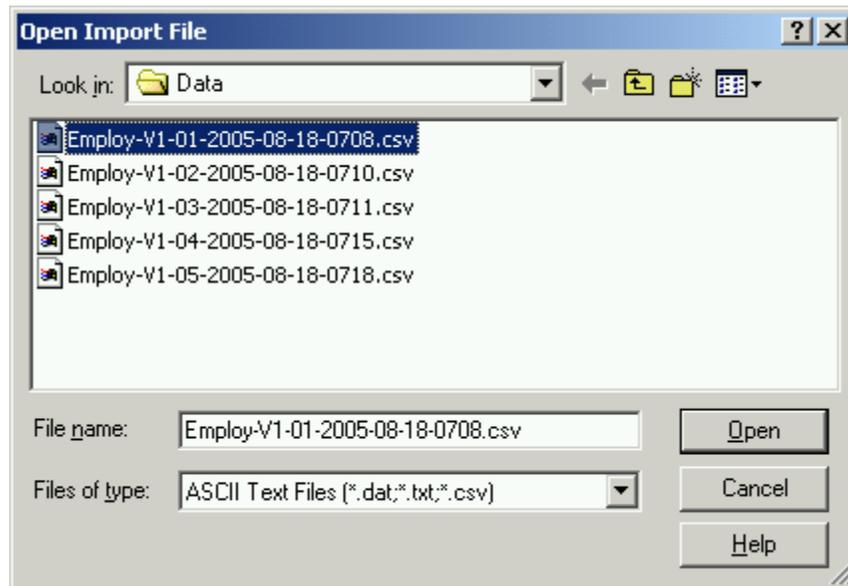


Figure 17: The *Open Import File* dialog box

9.5. Use the *Look in* drop down to navigate to the folder on your computer or on your network that contains the exported data files.

9.6. Click on the data file you want to import.

Choose the latest data file from data entry computer #1. Next time, you will choose the latest data file from data entry computer #2, and so on.

9.7. Click on the *Open* button on the *Open Import File As* dialog box.

Survey Crafter Professional displays the *Import Summary* dialog box.

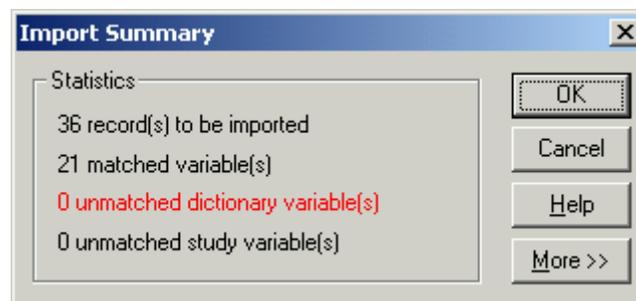


Figure 18: The *Import Summary* dialog box

9.8. Verify that there are *0 unmatched dictionary variable(s)*.

If there are one or more unmatched dictionary variables, click on the *More* button on the *Import Summary* dialog box. Survey Crafter Professional expands the *Import Sum-*

mary dialog box.

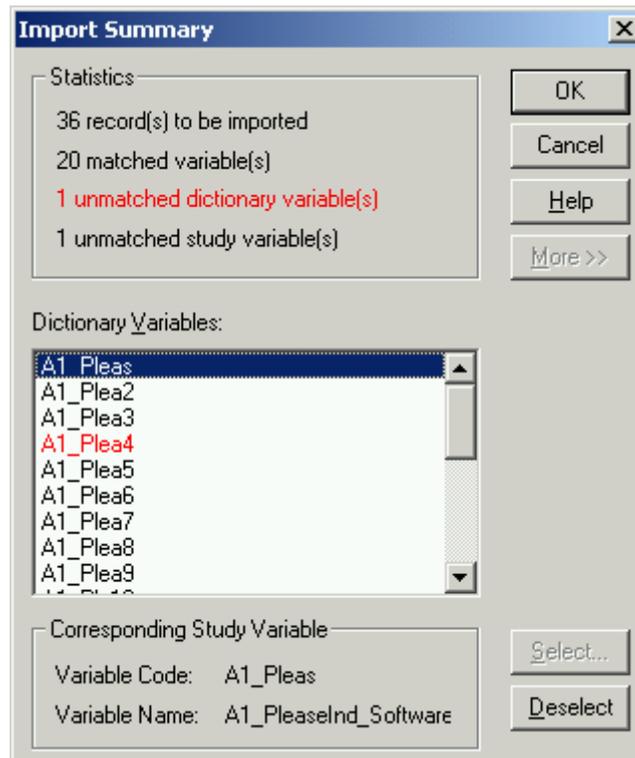


Figure 19: The expanded *Import Summary* dialog box

Use the mouse to locate the dictionary variables that are unmatched. Survey Crafter Professional colors unmatched dictionary variables red in the list under *Dictionary Variables*.

Having one or more unmatched dictionary variables indicates changes were made to the survey after the study file was copied for the data entry computer. If the changes were minor, you may be able to match the unmatched dictionary variables by double-clicking on each unmatched dictionary variable and choosing a study variable from Survey Crafter Professional's *Select Variable* dialog box.

If you are unsure how to match the unmatched dictionary variables, contact Survey Crafter technical support by e-mail at support@surveycrafter.com or by telephone at (US) 978.635.1717 for assistance.

- 9.9. If there are 0 unmatched dictionary variable(s), click on the *OK* button.
- 9.10. If there are no records in the *Data* window, Survey Crafter Professional imports the records from the data file. Otherwise, Survey Crafter Professional displays the *Import*

Options dialog box.

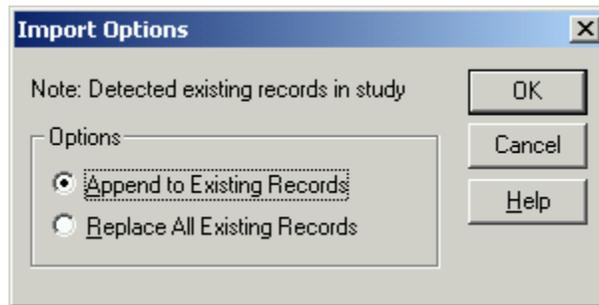


Figure 20: The *Import Options* dialog box

If you are importing records from data entry computer #1, click on *Replace All Existing Records*. Otherwise, click on *Append to Existing Records*.

Please note that *Replace All Existing Records* has Survey Crafter Professional delete all of the records in the *Data* window and replace them with the records from the data file.

These instructions assume that you have *not* used the master computer to enter data. If you have used the master computer to enter data and you have not yet exported the records you entered, click on the *Cancel* button. You will need to export the records in the same way you exported the records from the data entry computers.

If you have not used the master computer to enter data or you have already exported the records you entered to a data file, click on the *OK* button.

Survey Crafter Professional imports the records from the data file.

- 9.11. If Survey Crafter Professional does not encounter any unexpected or unreadable values, it updates the *Data* window. Otherwise, it displays the *Data Error Log* window.

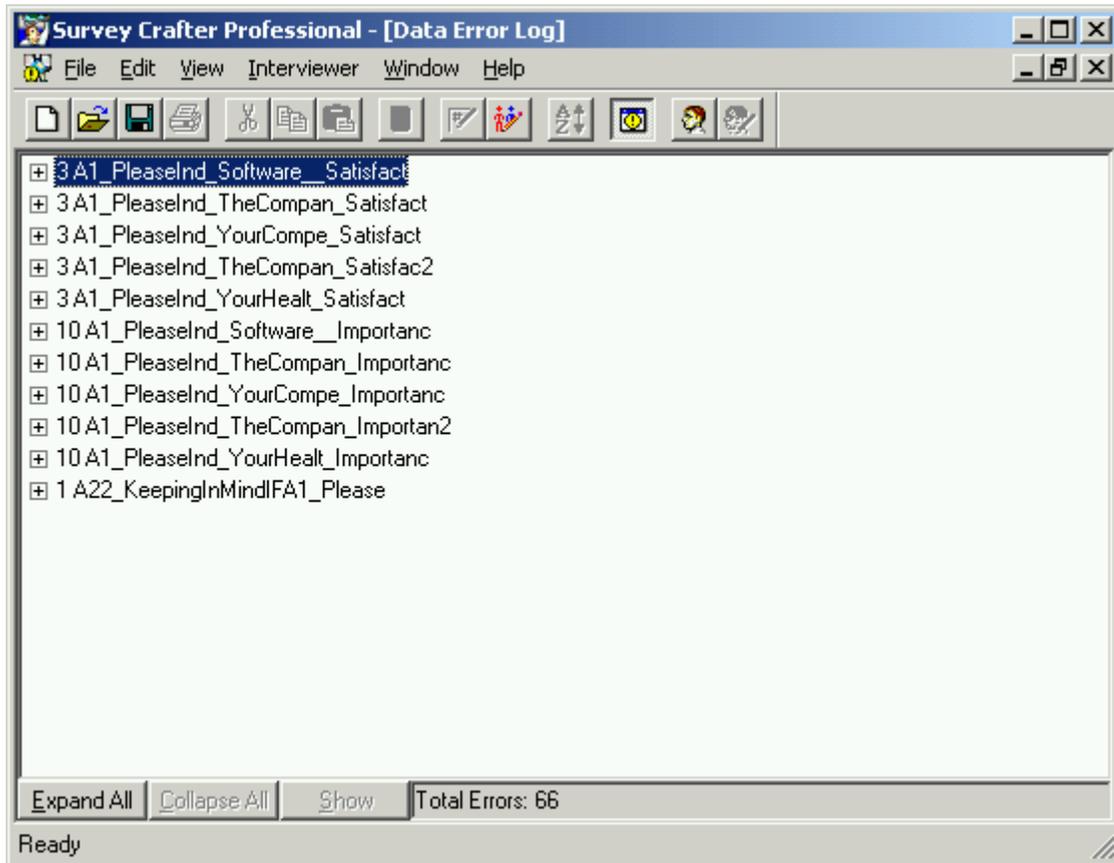


Figure 21: Survey Crafter Professional's *Data Error Log* window

The *Data Error Log* window shows all of the variables that contain unexpected and unreadable values. Unexpected values can result from respondents not following rules for ranking and constant sum questions, not answering questions that are required, answering a quantity question with a number that is out of range or answering an open-end question with more characters than expected.

When you double-click on a variable in the *Data Error Log* window, Survey Crafter Professional automatically applies a filter to the *Data* window, showing only those records for which the unexpected or unreadable values for the variable occur. You can clear the filter on the *Data* window by choosing *Clear Filter* from Survey Crafter Professional's *Edit* menu.

If the *Data Error Log* windows shows unexpected or unreadable values and you do not know why, contact Survey Crafter technical support by e-mail at support@survey-crafter.com or by telephone at (US) 978.635.1717.

Close the *Data Error Log* window.

- 9.12. Repeat steps 9.4 through 9.11 to import the records from the latest data file from the next data entry computer. Repeat these steps until you have imported the latest data files from all of the data entry computers.

You should now have the latest records for your survey and can update or create new analysis tables and charts.

Step 10

Repeat steps 7 through 9 until data entry is complete.

You should now have all of the records for your survey and can update or create new analysis tables and charts.