

Survey Crafter Walkthrough

Summary:	Comparing respondents who complete your survey on paper, by telephone or on the Web
Walkthrough:	SCWT-SCP350-0525501
Applies to:	Survey Crafter Professional 3.5 or later
Topic:	Paper, Telephone and Web Surveys
Last Updated:	Tuesday, September 13, 2005
More Info:	Click here for more walkthroughs

Synopsis

This walkthrough describes a procedure that has you create and assign values to a variable that you can use in Survey Crafter Professional's analysis wizards to compare respondents who complete your survey on paper, by telephone or on the Web.

Please note this walkthrough does *not* describe how to use the variable in Survey Crafter Professional's analysis wizards.

Briefly, the procedure has you do the following:

1. Design your survey in Survey Crafter Professional's *Survey Designer* window.
 2. Add a second survey to the same study and add a question that you can use to distinguish between respondents who complete your survey on paper, by telephone or on the Web.
 3. Add custom rules to your primary survey that have Survey Crafter Professional automatically answer the question in the second survey.
 4. Add the variable associated with the question in the second survey to your primary survey's web data file.
 5. If you want, move the variable associated with the question in the second survey to the left-most column in Survey Crafter Professional's *Data* window.
 6. Configure the built-in *Interviewer* to include or exclude the second survey.
 7. If necessary, use the *Data* window to manually answer the question in the second survey.
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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 can use the instructions even if respondents are already completing your web survey. In this case, it is recommended that you follow the instructions for your paper and telephone surveys but that you *not* change your web survey.

Walkthrough

Step 1

Design your survey in Survey Crafter Professional's Survey Designer window.

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 .

Step 2

Add a second survey to the same study and add a question that you can use to distinguish between respondents who complete your survey on paper, by telephone or on the Web.

Do the following:

- 2.1. Start Survey Crafter Professional.
- 2.2. Open your survey's study file.
- 2.3. Click on the *Surveys* tab of the *Study* window.

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

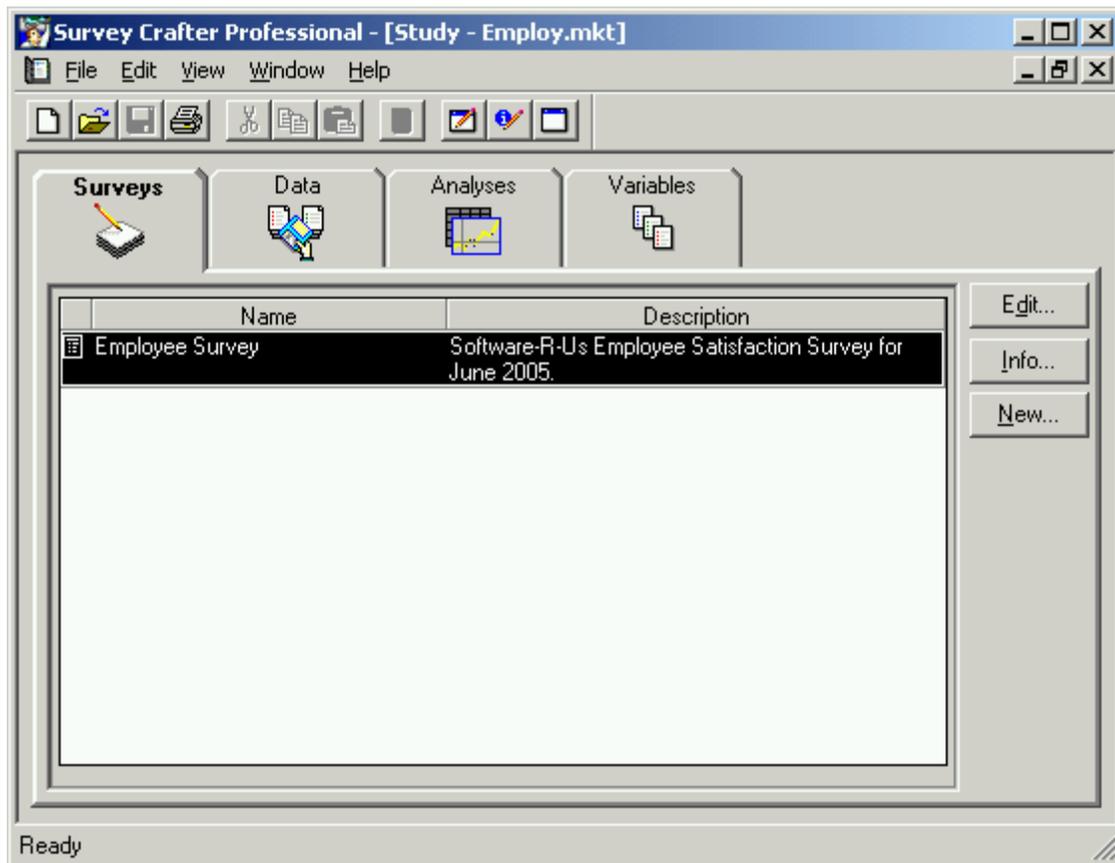


Figure 1: The *Surveys* tab of Survey Crafter Professional's *Study* window

2.4. Click on the *New* button on the *Surveys* tab.

Survey Crafter Professional displays Step 1 of 3 of the *New Survey Wizard*.

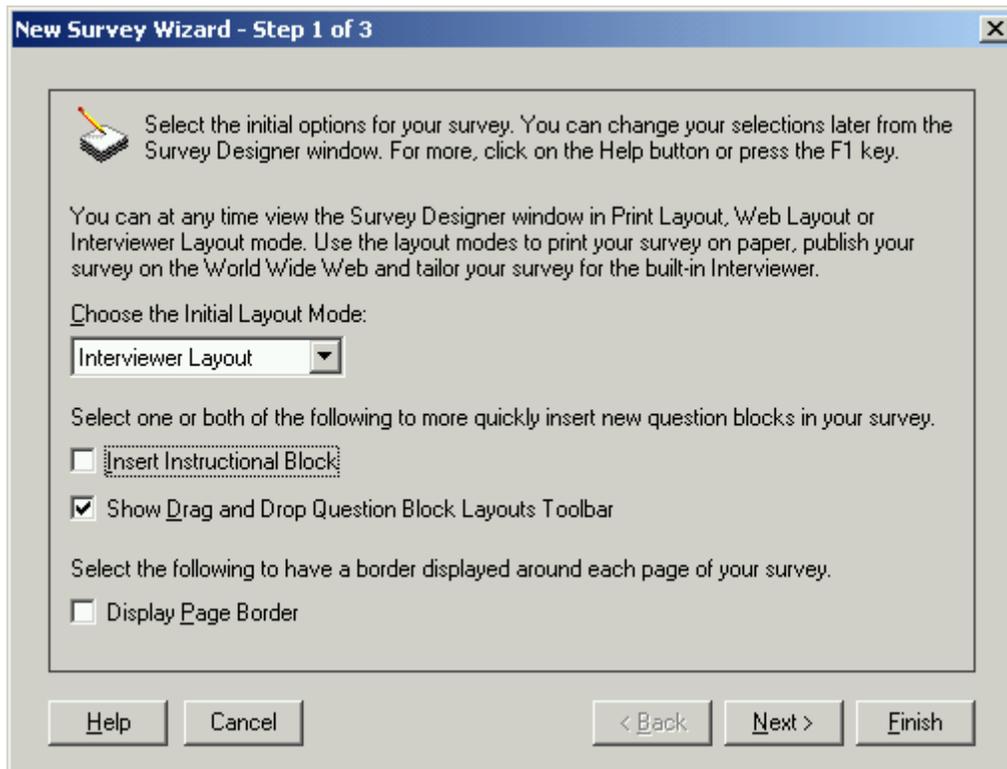


Figure 2: Step 1 of 3 of the *New Survey Wizard*

- 2.5. Choose *Interviewer Layout* from the drop down under *Choose the Initial Layout Mode*.
 - 2.6. Clear the check box labeled *Insert Instructional Block*.
 - 2.7. Click to select the check box labeled *Show Drag and Drop Question Block Layouts Toolbar*.
- Click on the *Next* button.

Survey Crafter Professional displays Step 2 of 3 of the *New Survey Wizard*.

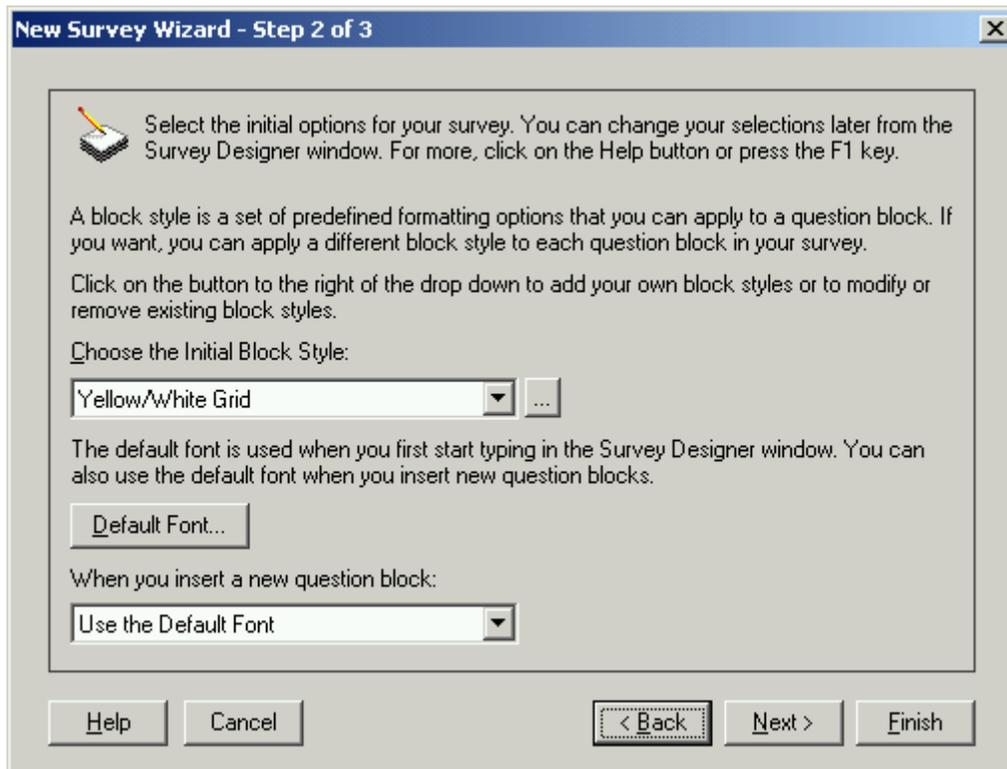


Figure 3: Step 2 of 3 of the *New Survey Wizard*

- 2.8. Choose the initial options you want and then click on the *Next* button. Click on the *Help* button for more information about the initial options.

Survey Crafter Professional displays Step 3 of 3 of the *New Survey Wizard*.

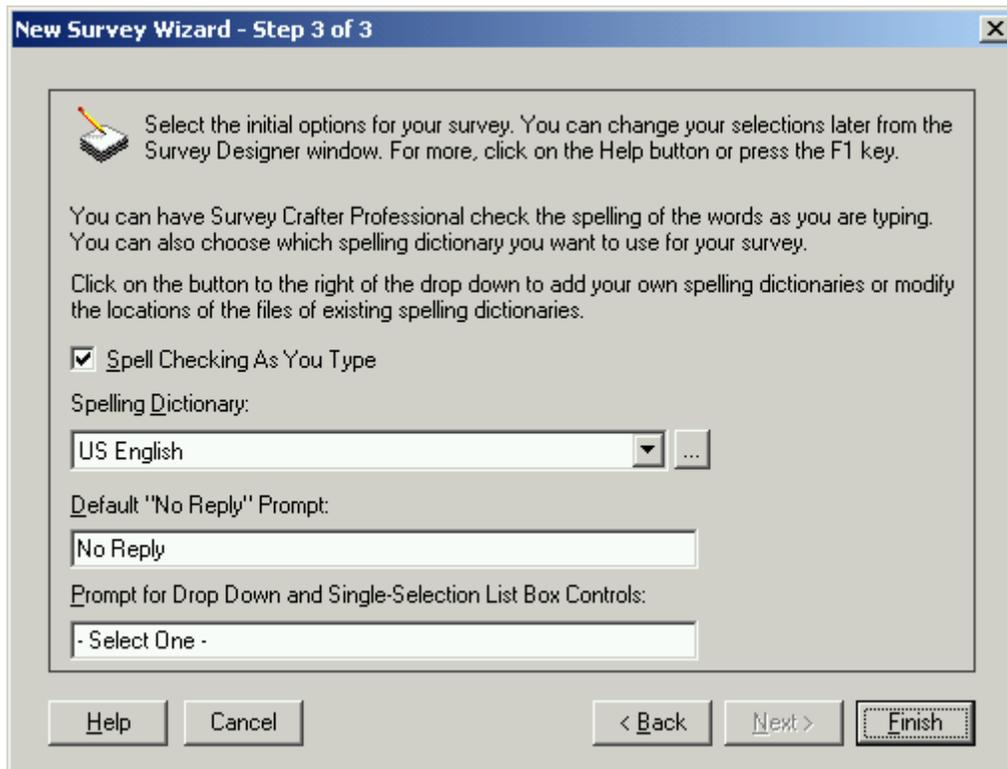


Figure 4: Step 3 of 3 of the *New Survey Wizard*

- 2.9. Choose the initial options you want and then click on the *Finish* button. Click on the *Help* button for more information about the initial options. Survey Crafter Professional displays the *Survey Information* dialog box.

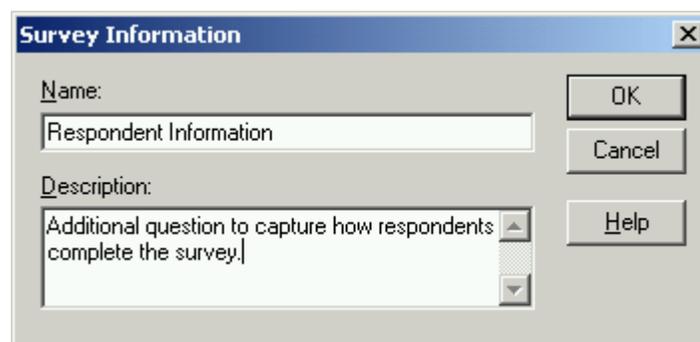


Figure 5: The *Survey Information* dialog box

- 2.10. Enter *Respondent Information* in the box under *Name*.
- 2.11. Enter *Additional question to capture how respondents complete the survey* in the box under *Description*.
- 2.12. Click on the *OK* button.

Survey Crafter Professional displays the *Survey Designer* window.

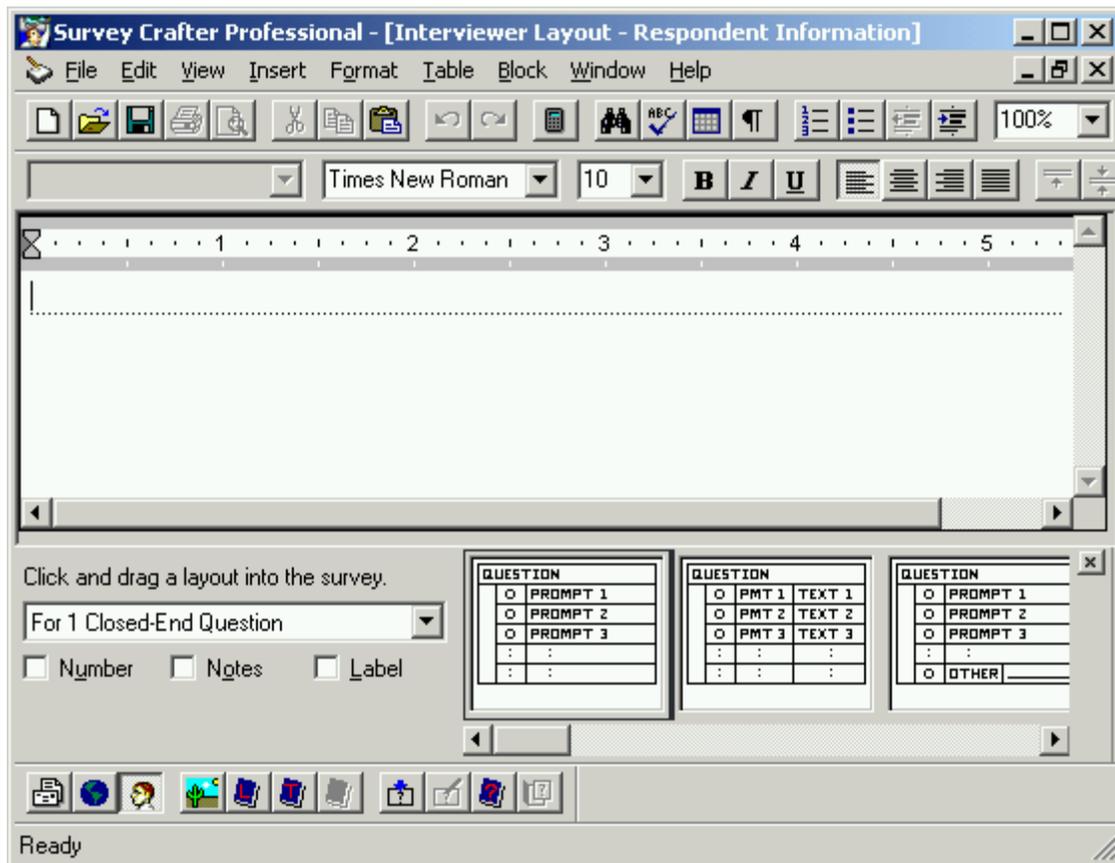


Figure 6: The *Survey Designer* window

- 2.13. Choose *For 1 Closed-End Question* from the drop down on the *Question Block Layouts* toolbar.
- 2.14. Clear the check boxes labeled *Number*, *Notes* and *Label* on the *Question Block Layouts* toolbar.
- 2.15. Double-click on the left-most block layout in the gallery of layouts on the *Question Block Layouts* toolbar.

Survey Crafter Professional displays Step 1 of 3 of the *Question Block Wizard*.

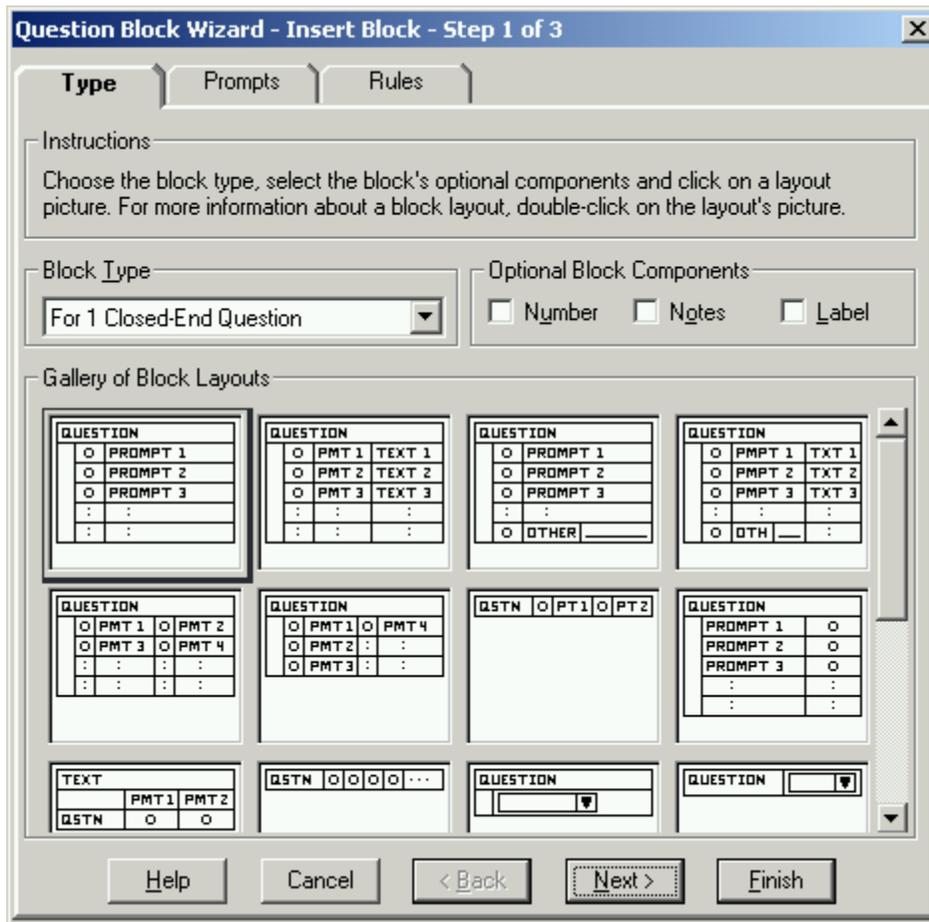


Figure 7: Step 1 of 3 of the *Question Block Wizard*

2.16. Click on the *Next* button.

Survey Crafter Professional displays Step 2 of 3 of the *Question Block Wizard*.

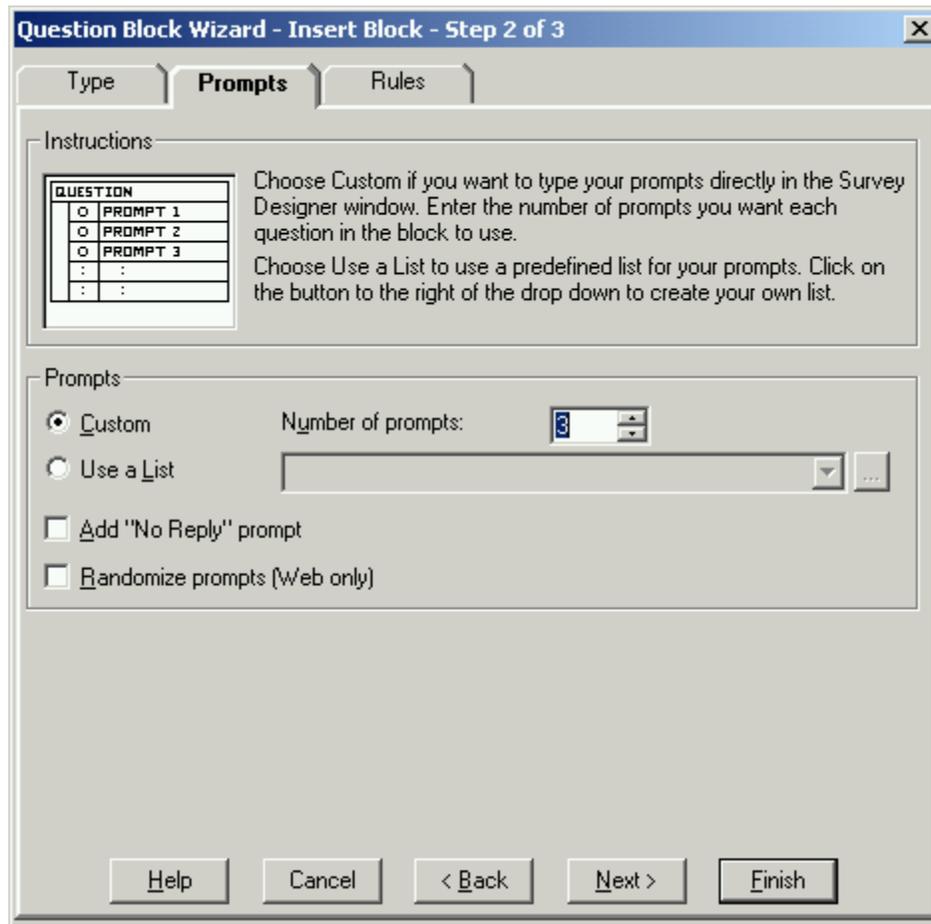


Figure 8: Step 2 of 3 of the *Question Block Wizard*

2.17. Click to select *Custom* and then enter the number of ways you will be administering your survey.

For example, if you are going to administer your survey on paper and on the Web, enter 2. If you are going to administer your survey on paper, by telephone and on the Web, enter 3.

2.18. Clear the check boxes labeled *Add "No Reply" prompt* and *Randomize prompts (Web only)*.

2.19. Click on the *Next* button.

Survey Crafter Professional displays Step 3 of 3 of the *Question Block Wizard*.

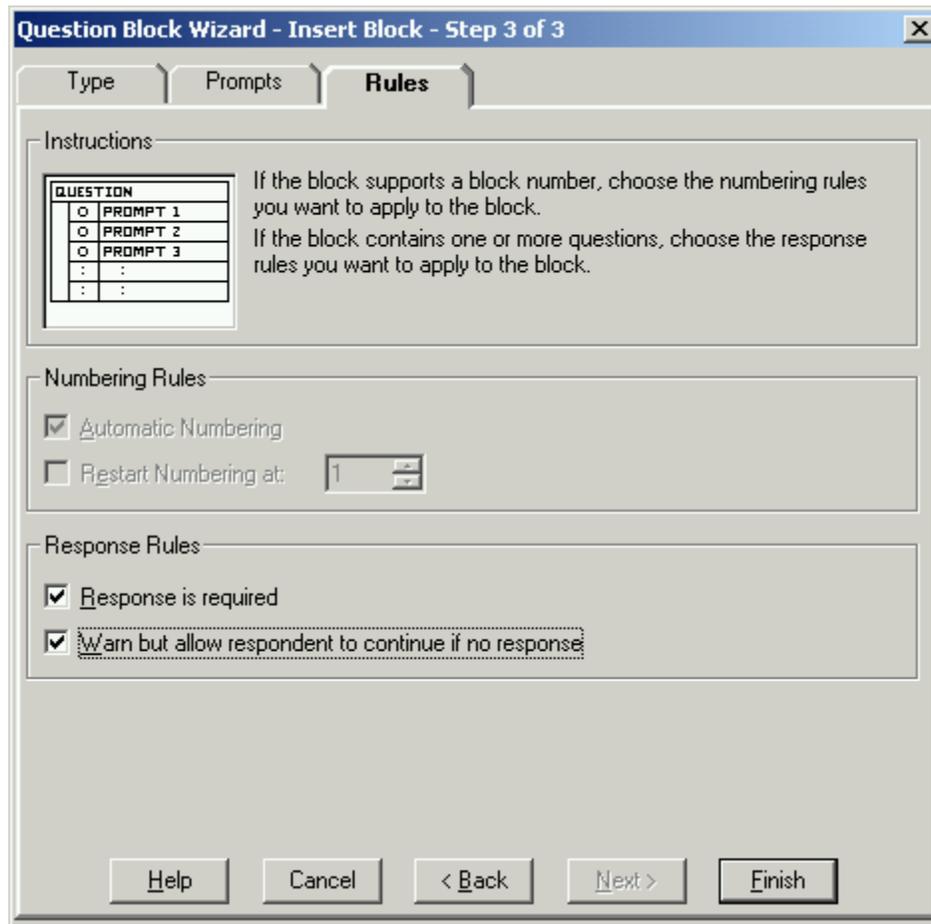


Figure 9: Step 3 of 3 of the *Question Block Wizard*

- 2.20. Click to select the check box labeled *Response is required*.
- 2.21. Click to select the check box labeled *Warn but allow respondent to continue if no response*.
- 2.22. Click on the *Finish* button.

Survey Crafter Professional adds the new question block to the *Survey Designer* window.

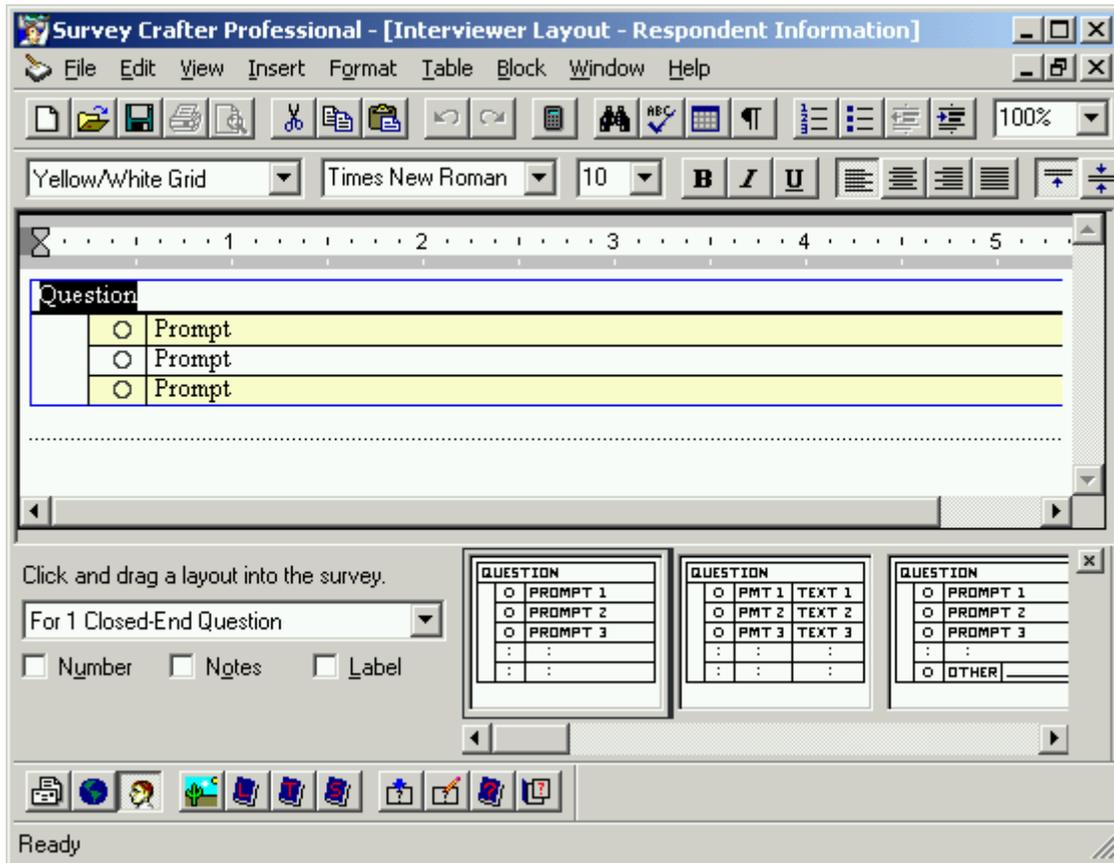


Figure 10: The *Survey Designer* window

2.23. In the *Survey Designer* window, replace *Question* with *Respondent*.

2.24. Replace the *Prompts* with the ways you are going to administer your survey.

For example, if you are going to administer your survey on paper, telephone and on the Web, replace the *Prompts* with *Paper*, *Telephone* and *Web*.

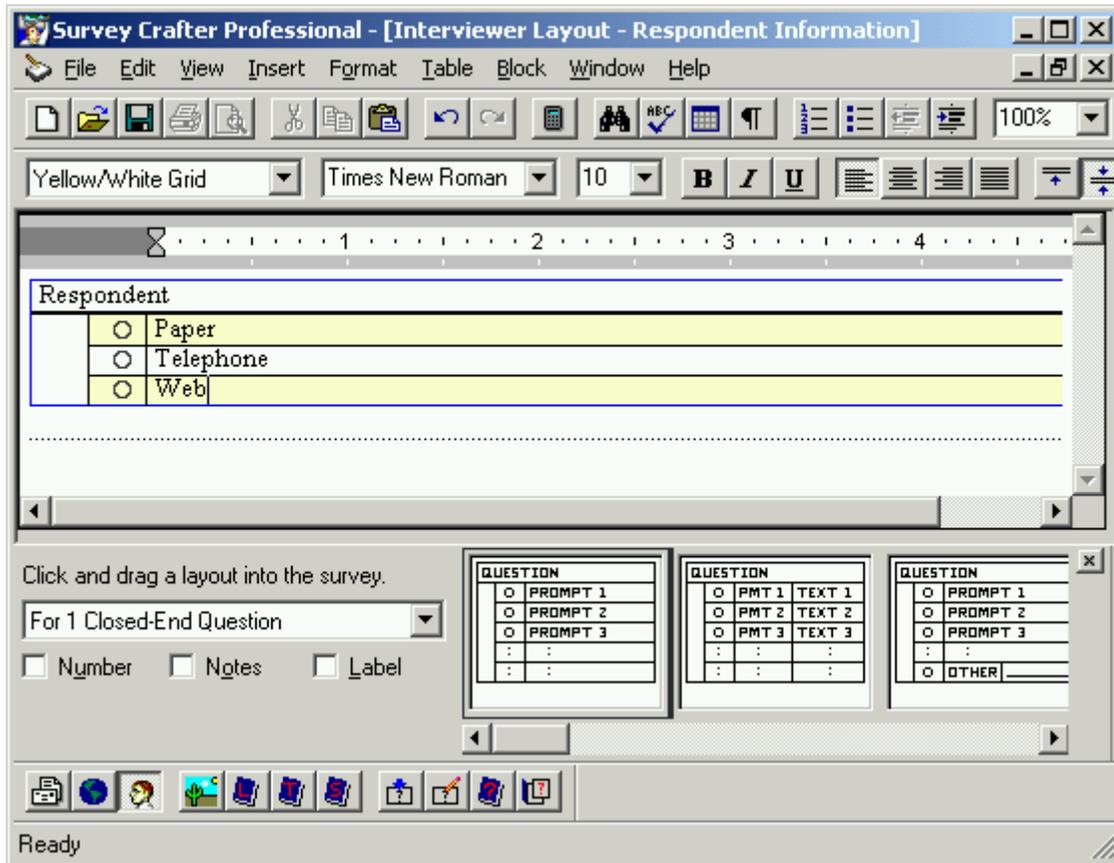


Figure 11: The *Survey Designer* window

2.25. Close the *Survey Designer* window.

2.26. Click on the *Save* button on Survey Crafter Professional's toolbar or choose *Save* from Survey Crafter Professional's *File* menu.

Step 3

Add custom rules to your primary survey that have Survey Crafter Professional automatically answer the question in the second survey.

Do the following:

- 3.1. In the *Surveys* tab of the *Study* window, double-click on your primary survey.
- 3.2. Right-click inside the first question block in your survey and choose *Custom Rules* from the pop-up menu.

Survey Crafter Professional displays the *Custom Rules* dialog box.

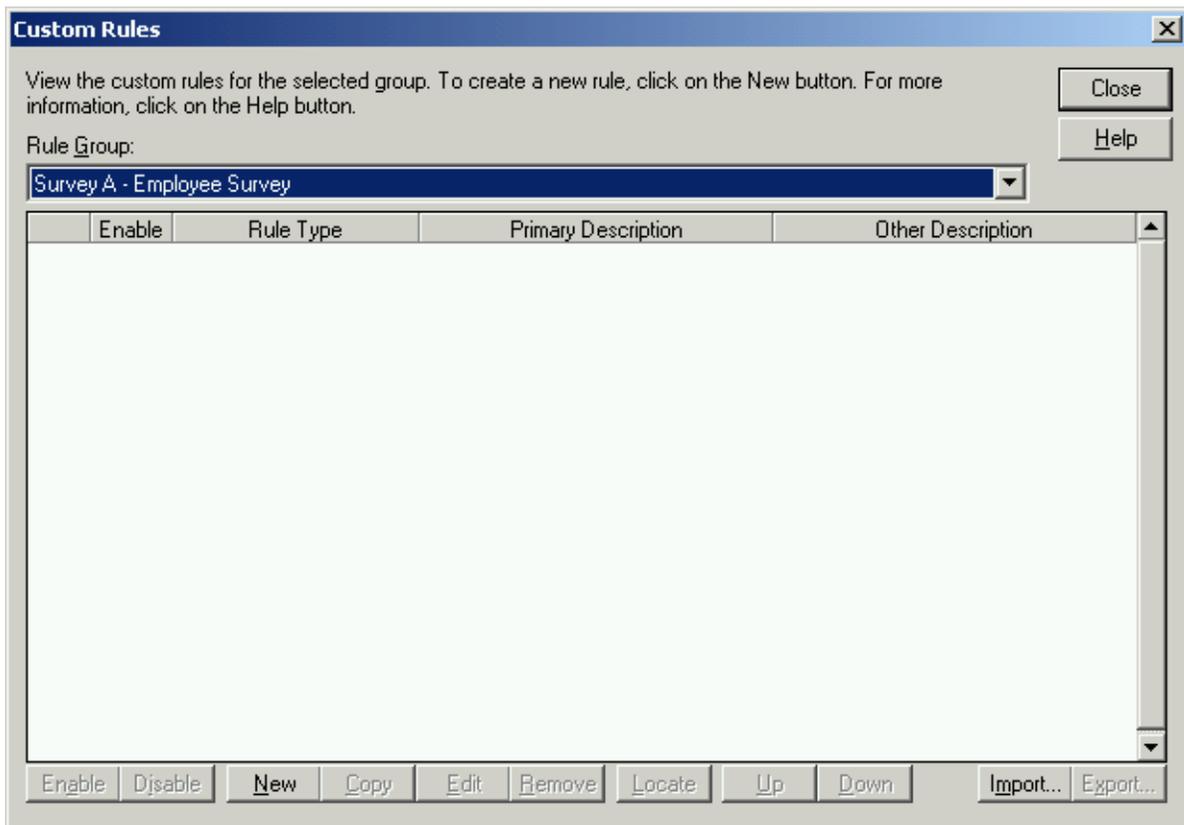


Figure 12: The *Custom Rules* dialog box

3.3. Click on the *New* button.

Survey Crafter Professional displays the *Custom Rule - New* dialog box.

Figure 13: The *Custom Rule - New* dialog box

3.4. If you are going to administer your survey on the Web, choose *After Web Page, Assign Variable* from the drop down under *Rule Type*. Otherwise, choose *After Interviewer Page, Assign Variable* from the drop down under *Rule Type*.

If respondents are already completing your web survey, it is recommended that you *not* choose *After Web Page, Assign Variable*. If respondents are already completing your web survey, choose *After Interviewer Page, Assign Variable* instead.

3.5. Click on the *Select* button to the right of the box under *Assign the imported variable*.

Survey Crafter Professional displays the *Select Imported Variable* dialog box.

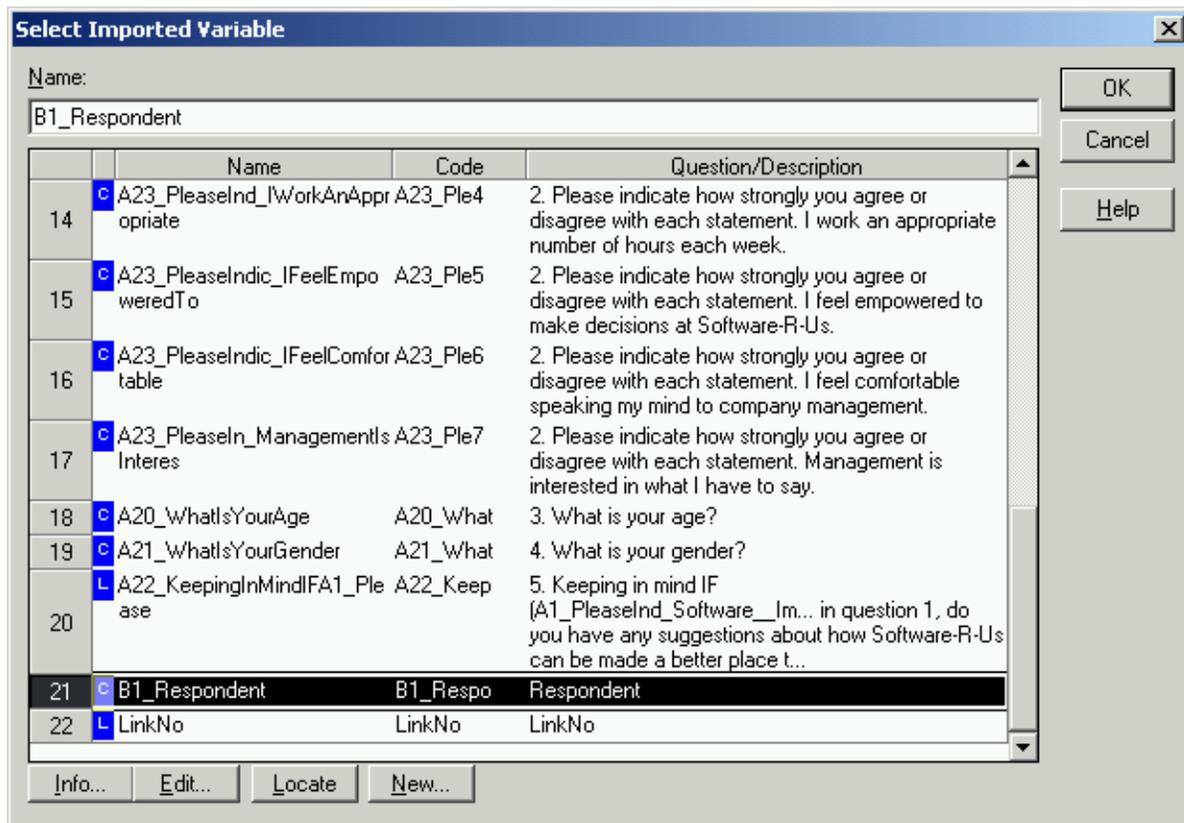


Figure 14: The *Select Imported Variable* dialog box

- 3.6. If necessary, scroll the list of variables until you see the variable that corresponds to the question in the second survey and then double-click on the variable.

Survey Crafter Professional updates the *Custom Rule - New* dialog box.

Figure 15: The *Custom Rule - New* dialog box

3.7. Click on the *Expression Builder* button to the right of the box under *The value*.

Survey Crafter Professional displays the *Expression Builder* dialog box.

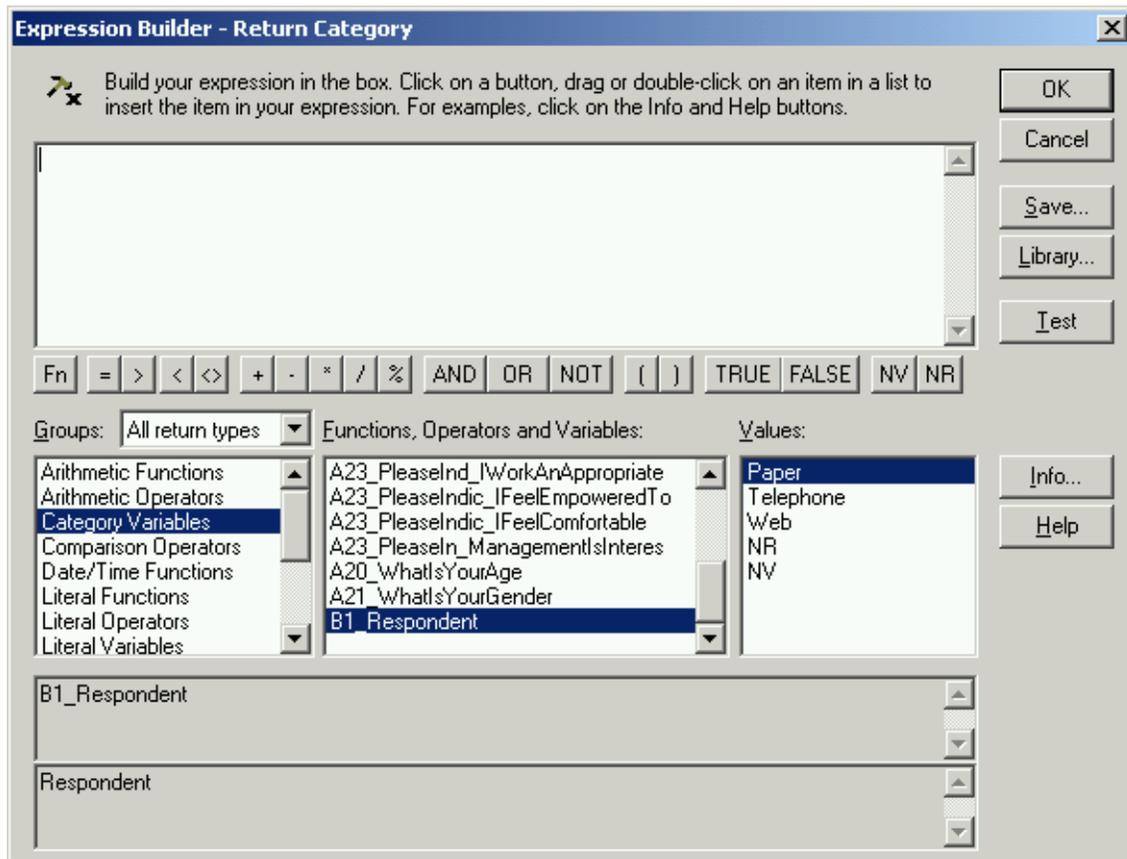


Figure 16: The *Expression Builder* dialog box

- 3.8. If you chose *After Web Page, Assign Variable* in step 3.4, double-click on *Web* under *Values*. If you chose *After Interviewer Page, Assign Variable* in step 3.4, double-click on either *Paper* or *Telephone*.

If you chose *After Web Page, Assign Variable* in step 3.4, Survey Crafter Professional will automatically assign the value when respondents click on your web survey's *Next* or *Submit* button on the page that contains your survey's first question.

If you chose *After Interviewer Page, Assign Variable* in step 3.4, Survey Crafter Professional will automatically assign the value when you click on the built-in Interviewer's *Next*, *Finish* or *Save* button on the page that contains your survey's first question. If you are going to administer your survey both on paper and by telephone, you are choosing the default answer to the question.

- 3.9. Click on the *OK* button.

Survey Crafter Professional updates the *Custom Rule - New* dialog box.

Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more information, click on the Help button.

Rule Type:
After Web Page, Assign Variable

Rule Group:
Survey A - Employee Survey

After respondents complete the web page that contains question block:
Block A1 - 1. Please indicate your satisfaction. Then rank the importance from 1 to 5.

Assign the imported variable:
B1_Respondent

The value:
'Web'

Always When the following condition is true:

Description (Optional):

Figure 17: The *Custom Rule - New* dialog box

- 3.10. Double-click on the variable name in the box under *Assign the imported variable* to highlight the name and press *Ctrl-C* to copy the name to the clipboard.
- 3.11. Click inside the box under *When the following condition is true* and press *Ctrl-V* to paste the variable name from the clipboard into the box.

Survey Crafter Professional updates the *Custom Rule - New* dialog box.

Figure 18: The *Custom Rule - New* dialog box

3.12. Click on the *Expression Builder* button to the right of the box under *When the following condition is true*.

Survey Crafter Professional displays the *Expression Builder* dialog box.

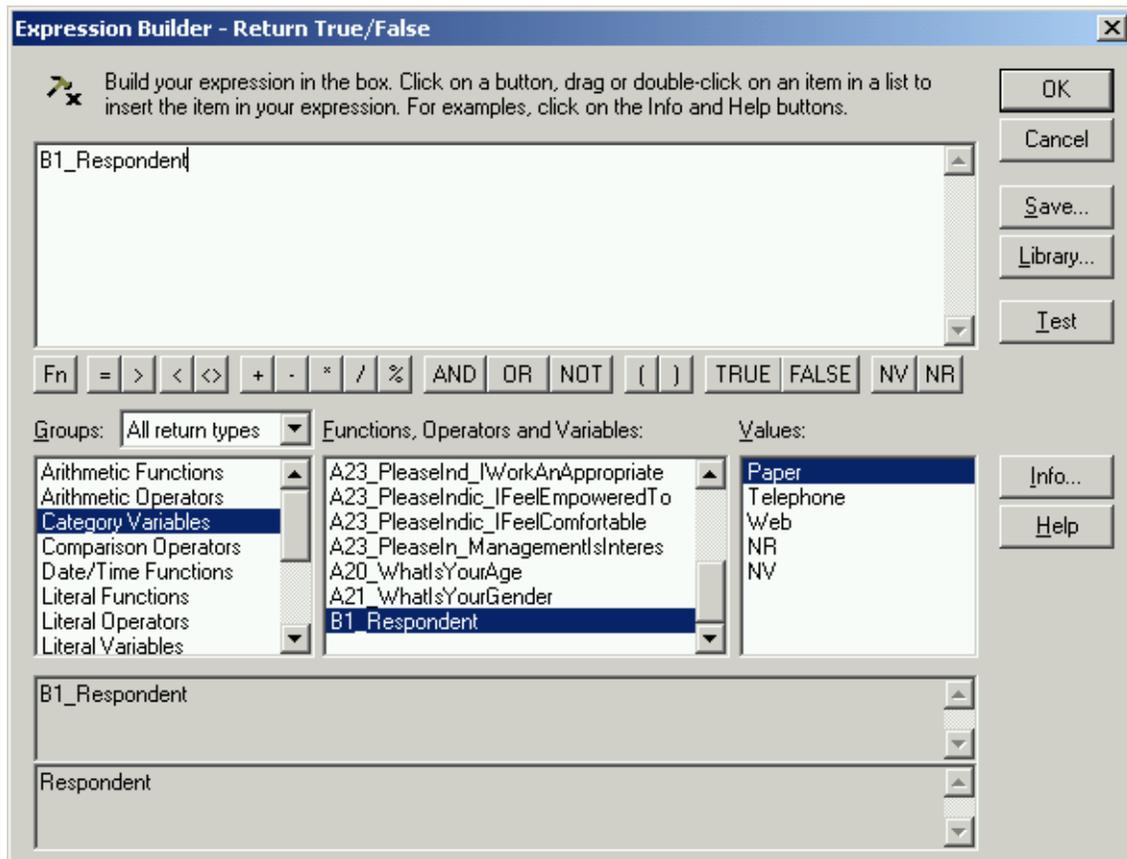


Figure 19: The *Expression Builder* dialog box

- 3.13. Click to the right of the variable name in the expression box at the top of the *Expression Builder* dialog box.

Survey Crafter Professional removes the highlight and places the cursor to the right of the variable name.

- 3.14. Click on the = button below the expression box.
- 3.15. Click on the NV button below the expression box.
- 3.16. Click on the OK button on the *Expression Builder* dialog box.

Survey Crafter Professional updates the *Custom Rule - New* dialog box.

Custom Rule - New

Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more information, click on the Help button.

Rule Type:
After Web Page, Assign Variable

Rule Group:
Survey A - Employee Survey

After respondents complete the web page that contains question block:
Block A1 - 1. Please indicate your satisfaction. Then rank the importance from 1 to 5.

Assign the imported variable:
B1_Respondent

The value:
'Web'

Always When the following condition is true:

B1_Respondent=NV

Description (Optional):

OK
Cancel
Help
Locate
Select...

Figure 20: The *Custom Rule - New* dialog box

3.17. Click on the *OK* button on the *Custom Rule - New* dialog box.

Survey Crafter Professional updates the *Custom Rules* dialog box.

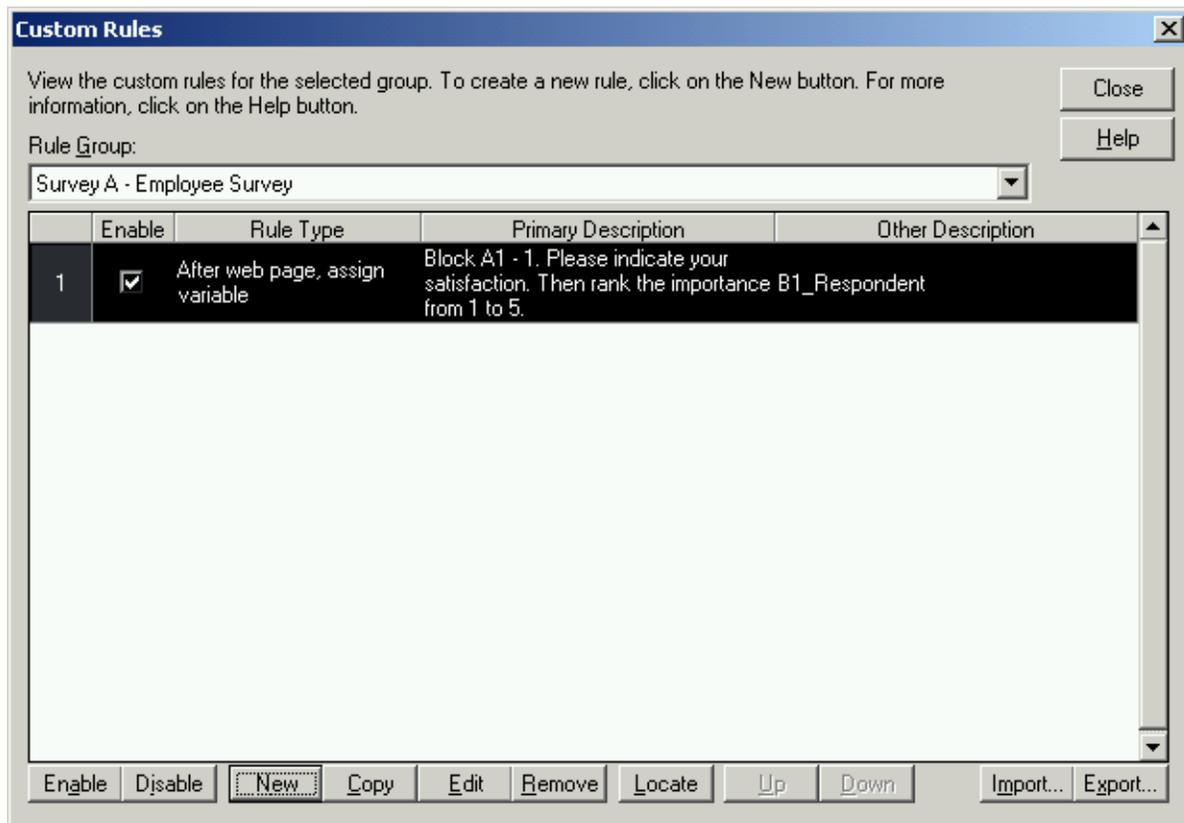


Figure 21: The *Custom Rules* dialog box

3.18. If you chose *After Interviewer Page, Assign Variable* in step 3.4, skip to step 4. Otherwise, click on the *Copy* button on the *Custom Rules* dialog box and continue with the next step.

Survey Crafter Professional displays the *Custom Rule - New Copy* dialog box.

Custom Rule - New Copy

Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more information, click on the Help button.

Rule Type:
After Web Page, Assign Variable

Rule Group:
Survey A - Employee Survey

After respondents complete the web page that contains question block:
Block A1 - 1. Please indicate your satisfaction. Then rank the importance from 1 to 5.

Assign the imported variable:
B1_Respondent

The value:
'Web'

Always When the following condition is true:
B1_Respondent=NV

Description (Optional):

OK
Cancel
Help
Locate
Locate
Select...
Expression Builder
Expression Builder

Figure 22: The *Custom Rule - New Copy* dialog box

3.19. Choose *After Interviewer Page, Assign Variable* from the drop down under *Rule Type*.

3.20. Click on the *Expression Builder* button to the right of the box under *The value*.

Survey Crafter Professional displays the *Expression Builder* dialog box.

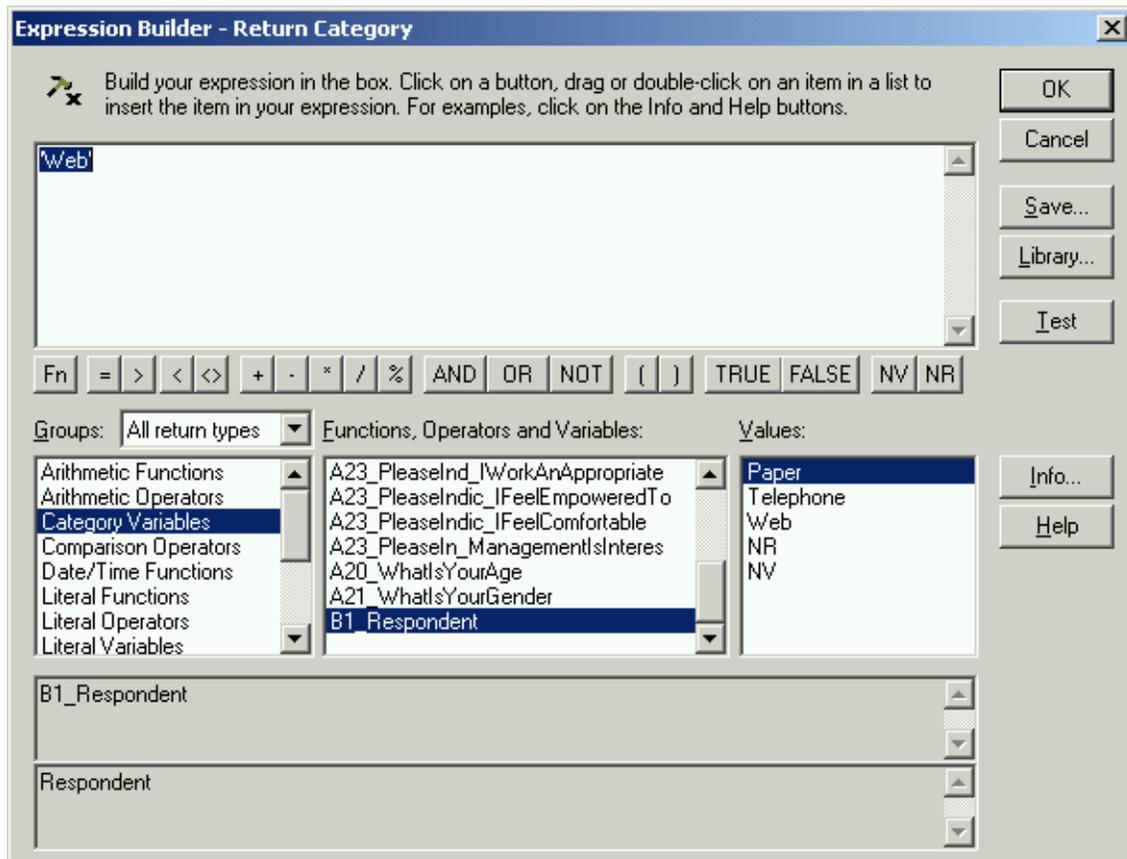


Figure 23: The *Expression Builder* dialog box

3.21. Double-click on either *Paper* or *Telephone* under *Values*.

Survey Crafter Professional will automatically assign the value when you click on the built-in Interviewer's *Next*, *Finish* or *Save* button on the page that contains your survey's first question. If you are going to administer your survey both on paper and by telephone, you are choosing the default answer to the question.

3.22. Click on the *OK* button.

Survey Crafter Professional updates the *Custom Rule - New Copy* dialog box.

Custom Rule - New Copy

Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more information, click on the Help button.

Rule Type:
After Interviewer Page, Assign Variable

Rule Group:
Survey A - Employee Survey

After respondents complete the interviewer page that contains question block:
Block A1 - 1. Please indicate your satisfaction. Then rank the importance from 1 to 5.

Assign the imported variable:
B1_Respondent

The value:
'Paper'

Always When the following condition is true:
B1_Respondent=NV

Description (Optional):

OK
Cancel
Help

Figure 24: The *Custom Rule - New Copy* dialog box
3.23. Click on the OK button.

Survey Crafter Professional updates the *Custom Rules* dialog box.

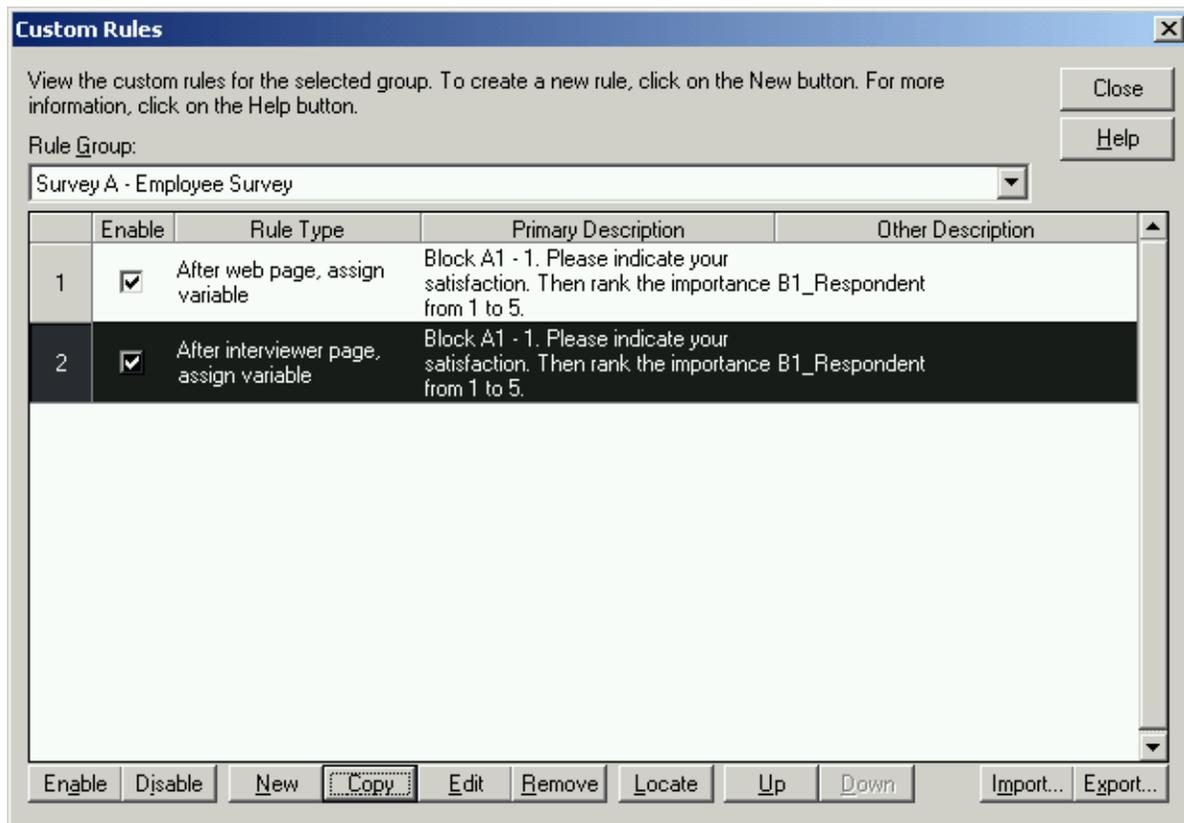


Figure 25: The *Custom Rules* dialog box

3.24. Click on the *Close* button on the *Custom Rules* dialog box.

3.25. Close the *Survey Designer* window.

3.26. Click on the *Save* button on Survey Crafter Professional's toolbar or choose *Save* from Survey Crafter Professional's *File* menu.

Step 4

Add the variable associated with the question in the second survey to your primary survey's web data file.

If respondents are already completing your web survey, it is recommended that you *not* perform this step. If respondents are already completing your web survey, skip to step 5.

Do the following:

4.1. In the *Surveys* tab of the *Study* window, double-click on your primary survey.

4.2. Click on the *Web Layout* button on Survey Crafter Professional's toolbar or choose *Web Layout* from Survey Crafter Professional's *View* menu.

4.3. Choose *Web Survey Setup* from Survey Crafter Professional's *Web* menu.

4.4. Click on the *Data File* tab of the *Web Survey Setup* dialog box.

Survey Crafter Professional displays the *Data File* tab *Web Survey Setup* dialog box.

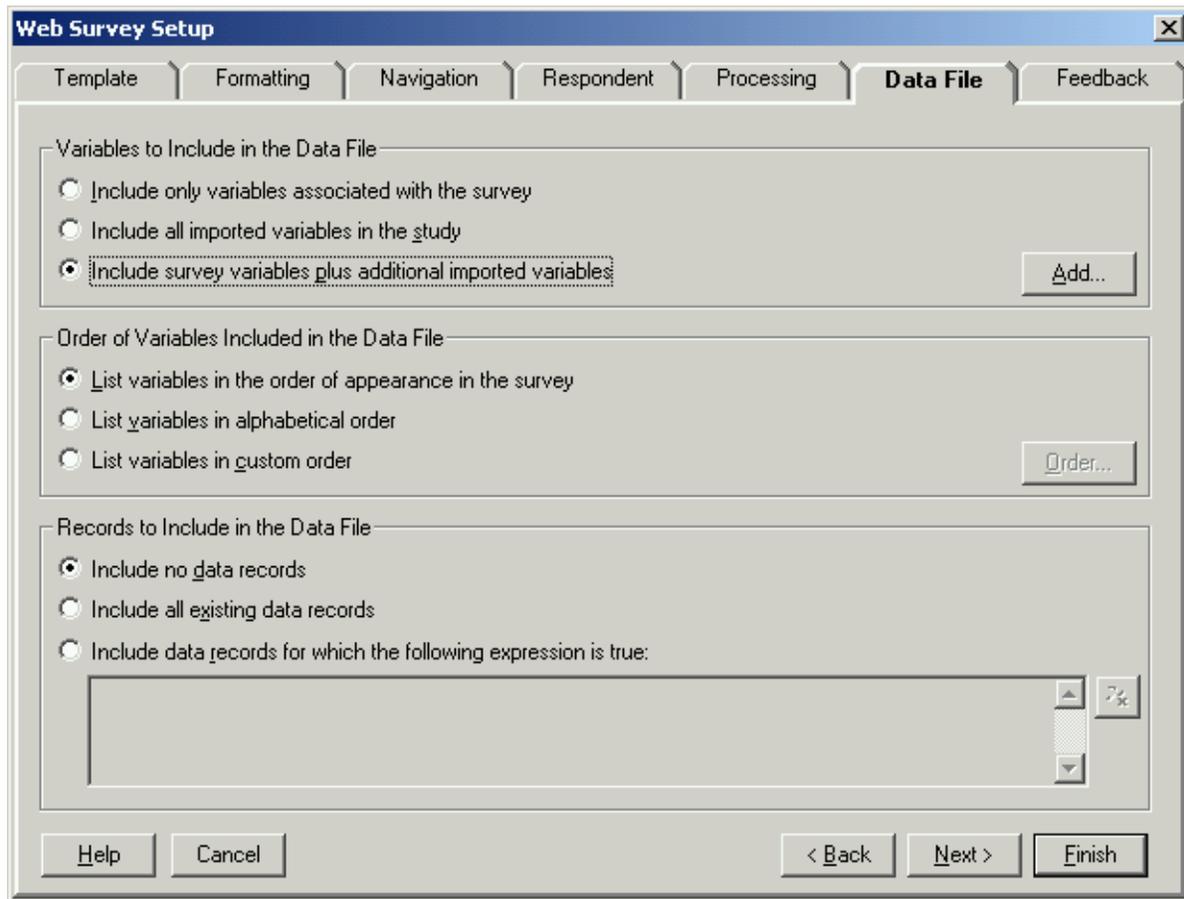


Figure 26: The *Data File* tab of the *Web Survey Setup* dialog box

- 4.5. If *Include all imported variables in the study* is selected, click on the *Cancel* button and skip to step 5. Otherwise, click on *Include survey variables plus additional imported variables* and continue with the next step.
- 4.6. Click on the *Add* button to the right of *Include survey variables plus additional imported variables*.

Survey Crafter Professional displays the *Web Survey Data File - Add Variables* dialog box.

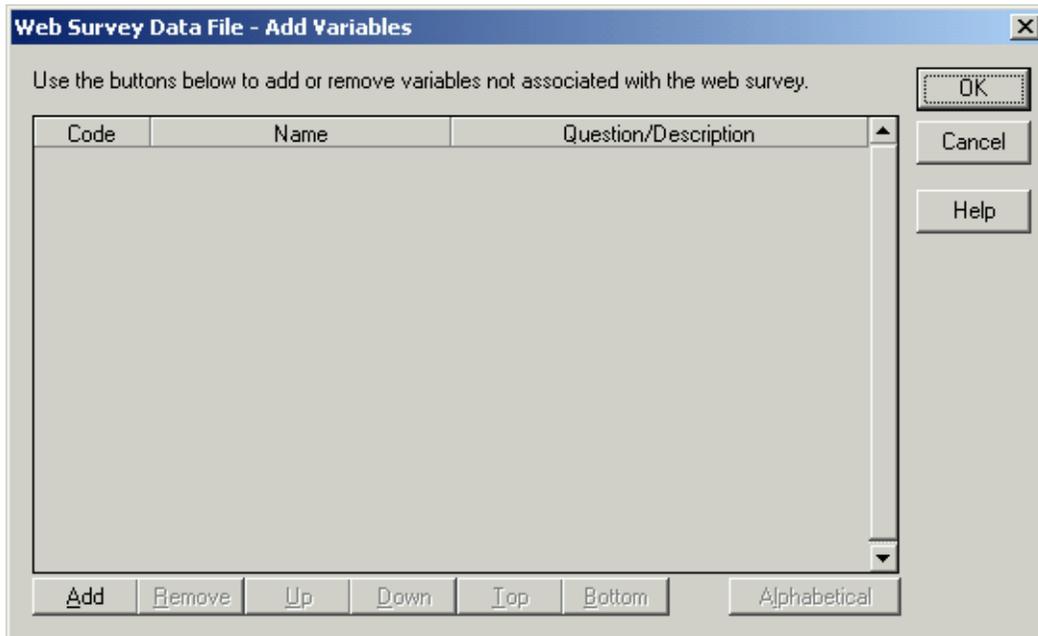


Figure 27: The *Web Survey Data File - Add Variables* dialog box
4.7. Click on the *Add* button at the bottom left corner of the dialog box.

Survey Crafter Professional displays the *Select Imported Variable* dialog box.

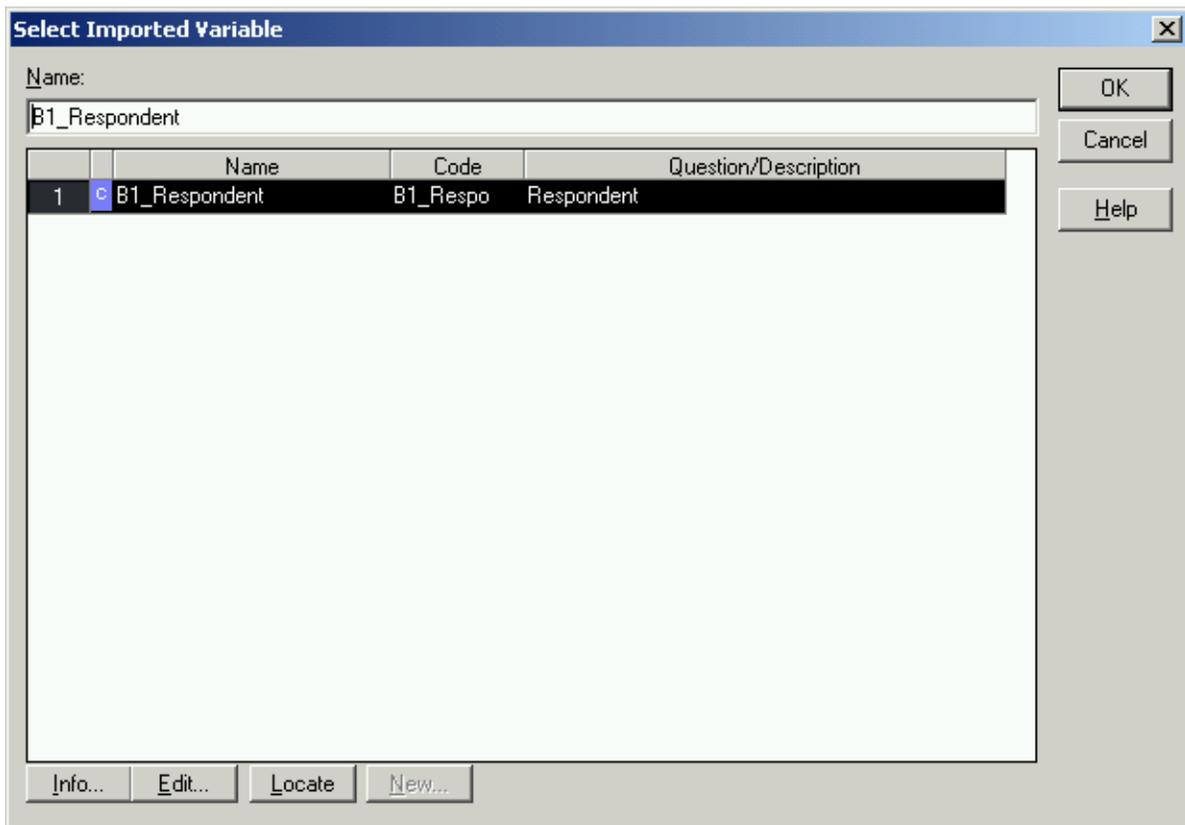


Figure 28: The *Select Imported Variable* dialog box

4.8. Double-click on the variable associated with the question in the second survey.

Survey Crafter Professional updates the *Web Survey Data File - Add Variables* dialog box.

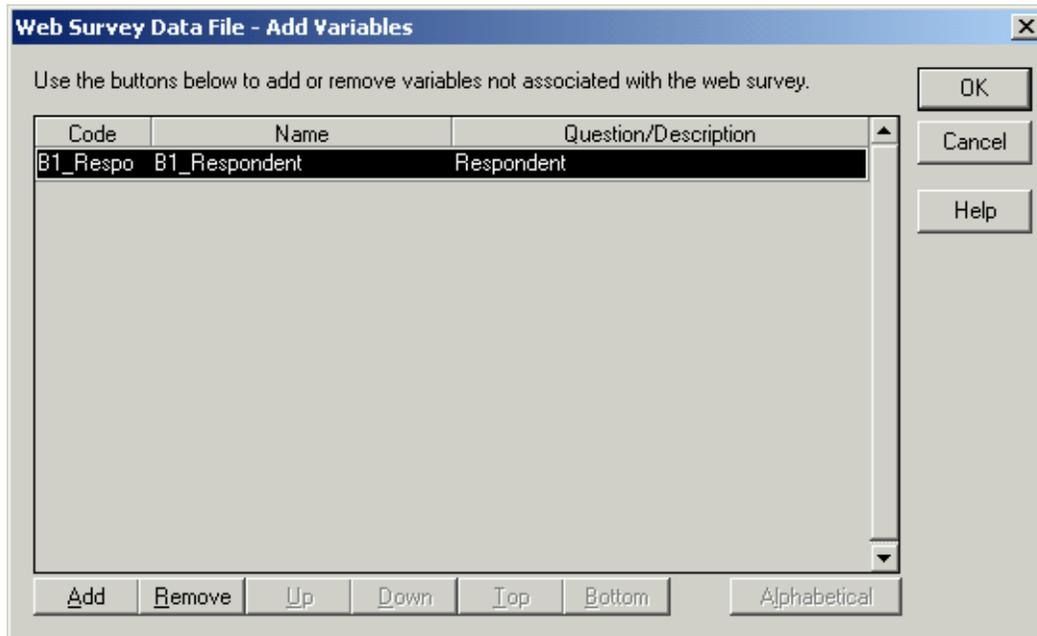


Figure 29: The *Web Survey Data File - Add Variables* dialog box

- 4.9. Click on the *OK* button.
- 4.10. Click on the *Finish* button on the *Web Survey Setup* dialog box.
- 4.11. Close the *Survey Designer* window.
- 4.12. Click on the *Save* button on Survey Crafter Professional's toolbar or choose *Save* from Survey Crafter Professional's *File* menu.

If you have already published your web survey, you will need to publish your web survey again.

Step 5

If you want, move the variable associated with the question in the second survey to the left-most column in Survey Crafter Professional's *Data* window.

Do the following:

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

Survey Crafter Professional displays the *Data* window.

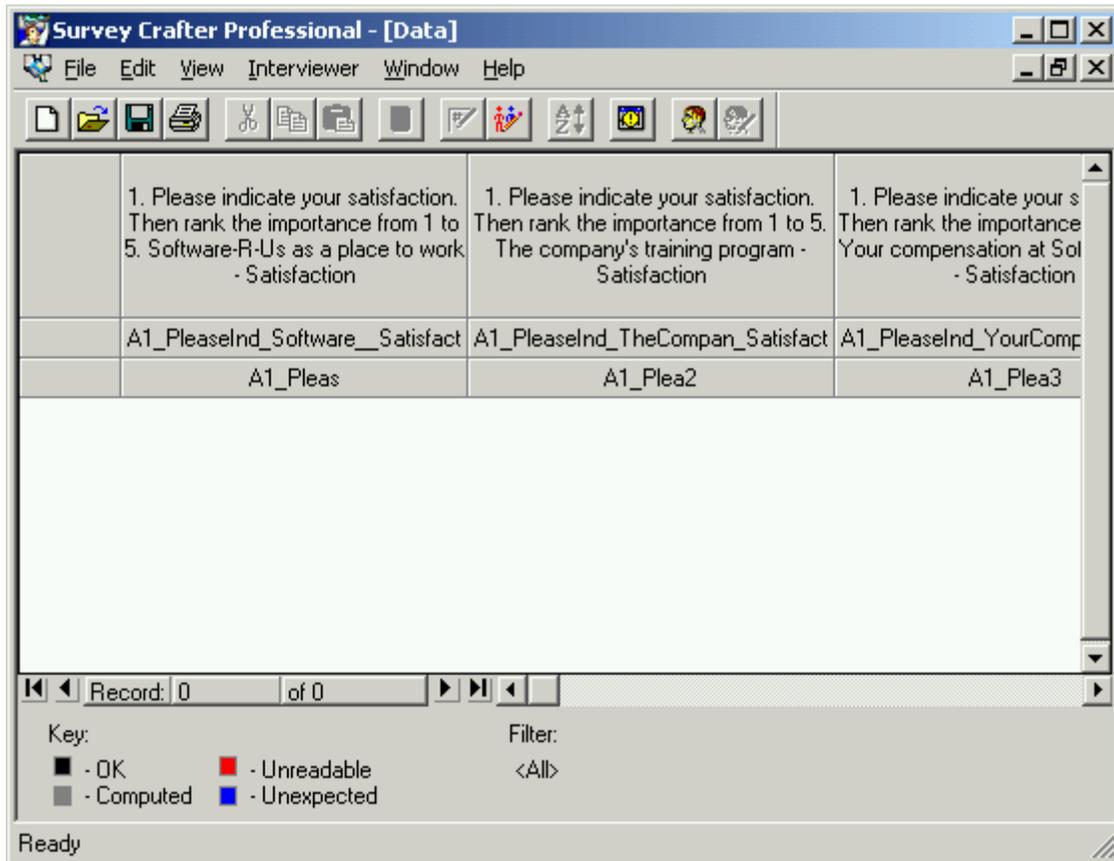


Figure 30: Survey Crafter Professional's *Data* window

5.3. Choose *Show/Hide Variables* from Survey Crafter Professional's *View* menu.

Survey Crafter Professional displays the *Show/Hide Variables* dialog box.

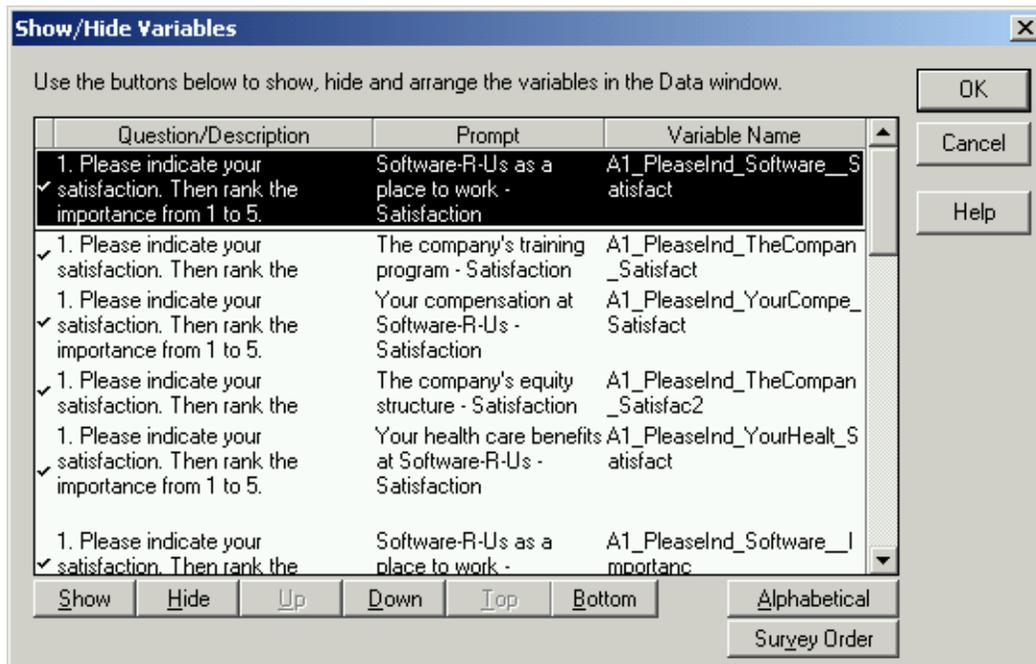


Figure 31: The *Show/Hide Variables* dialog box

- 5.4. If you want the columns in the *Data* window to appear in the order of the questions in your survey, click on the *Survey Order* button at the bottom right corner of the dialog box and then click on the *Yes* button.
- 5.5. Scroll to the end of the list of variables and click on the variable that is associated with the question in the second survey.

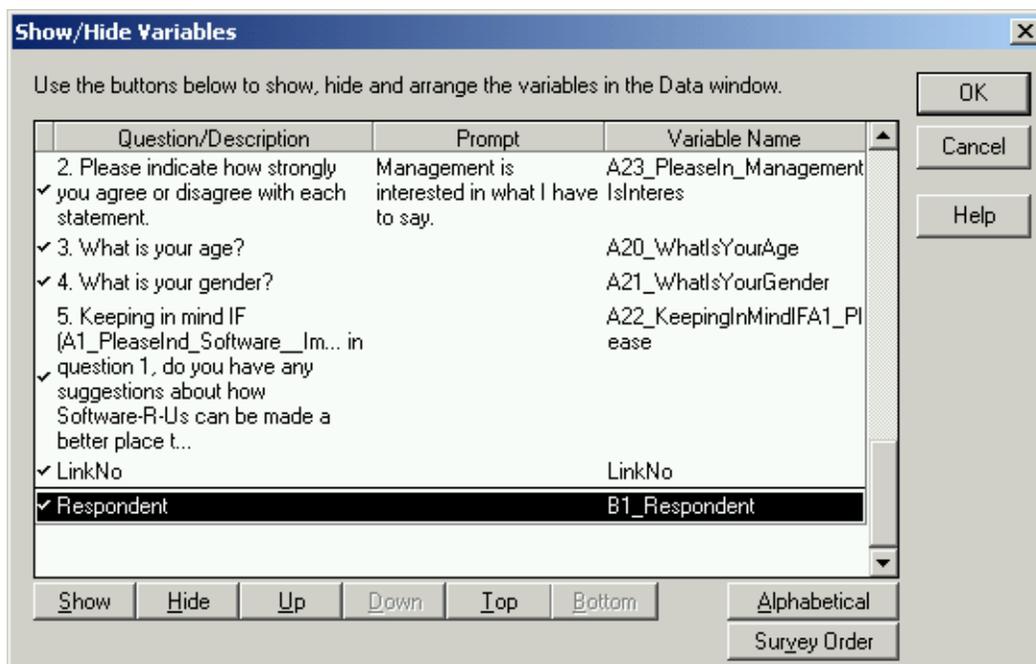


Figure 32: The *Show/Hide Variables* dialog box

5.6. Click on the *Top* button.

Survey Crafter Professional moves the variable to the top of the list.

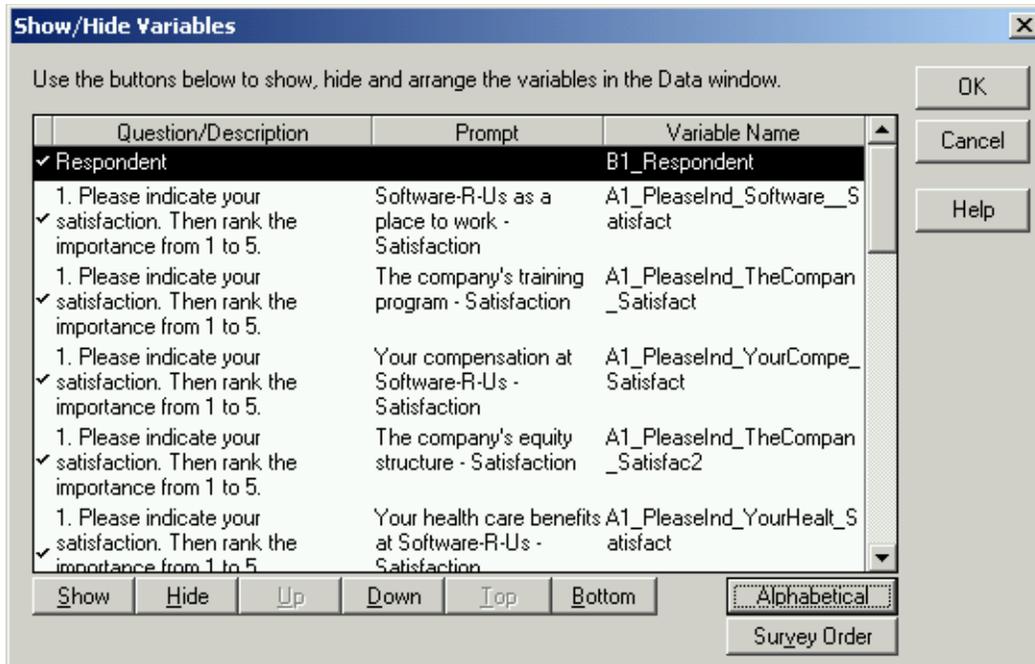


Figure 33: The *Show/Hide Variables* dialog box

5.7. Click on the *OK* button.

Survey Crafter Professional updates the *Data* window.

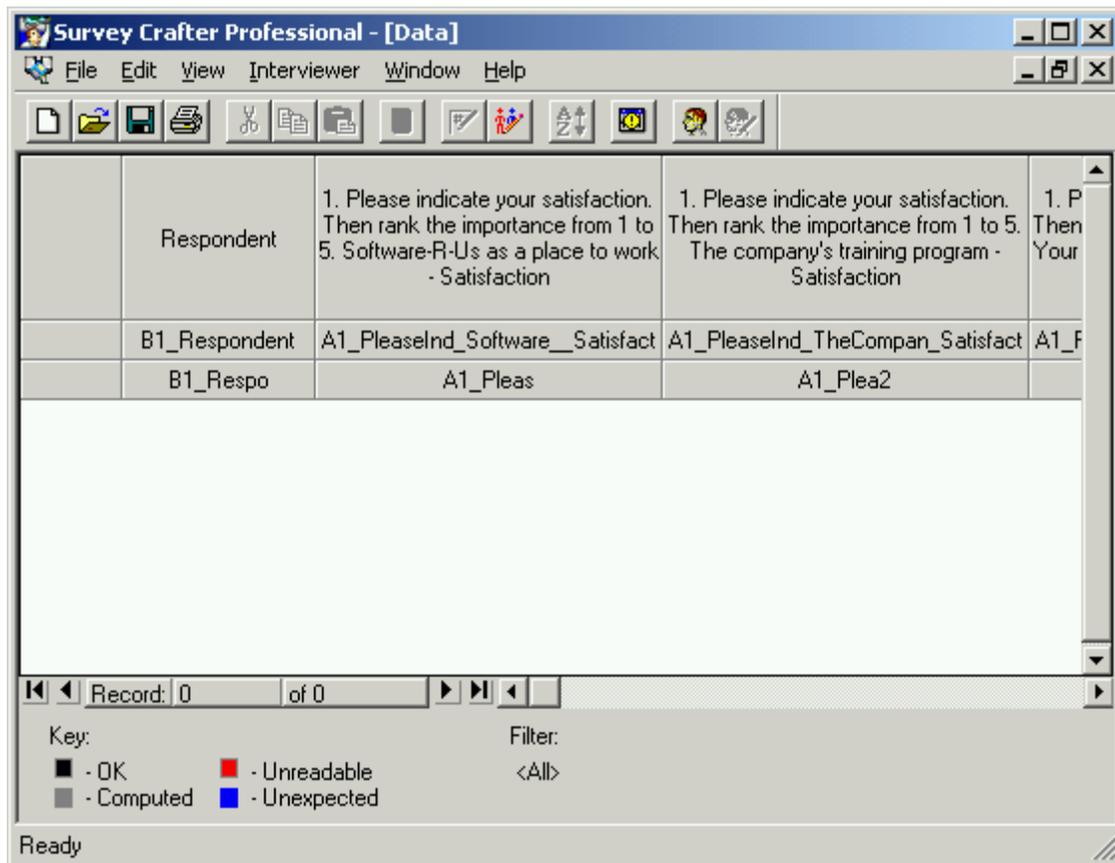


Figure 34: Survey Crafter Professional's *Data* window

5.8. Close the *Data* window.

5.9. Click on the *Save* button on Survey Crafter Professional's toolbar or choose *Save* from Survey Crafter Professional's *File* menu.

Step 6

Configure the built-in *Interviewer* to include or exclude the second survey.

Do the following:

6.1. Click on the *Data* tab of the *Study* window.

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

Survey Crafter Professional displays the *Data* window.

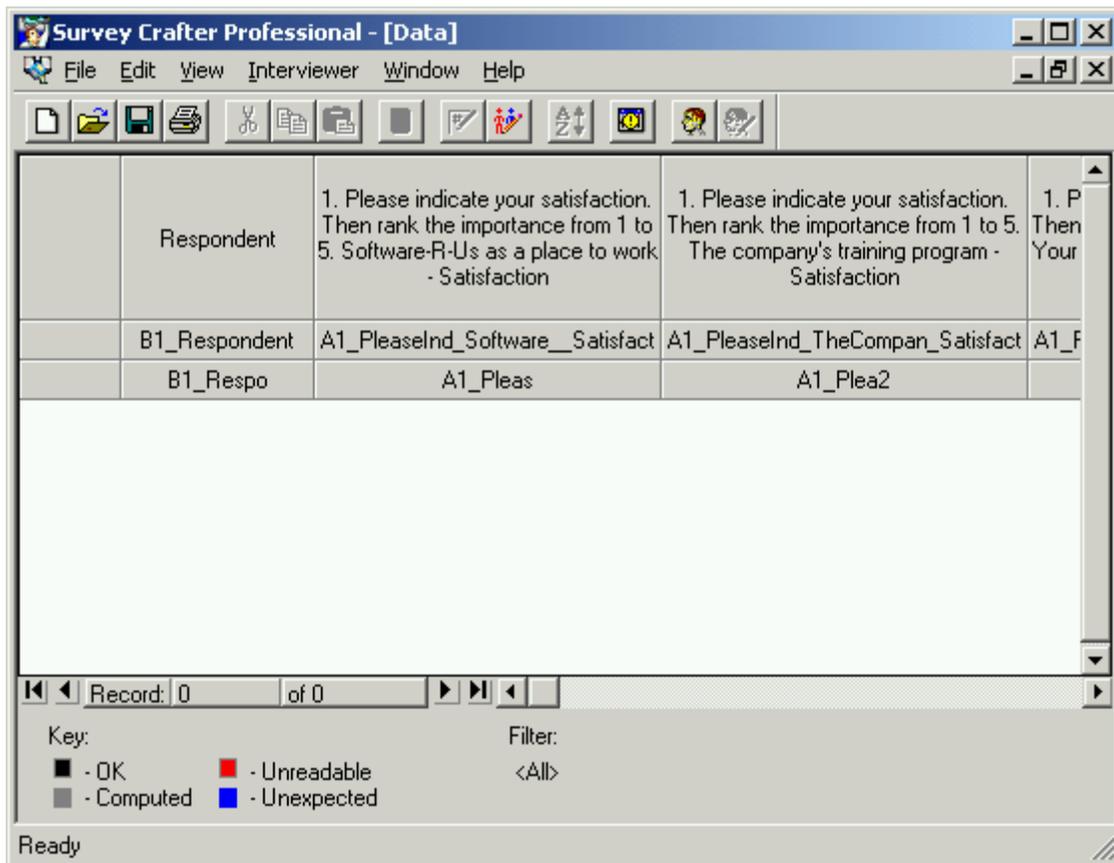


Figure 35: Survey Crafter Professional's *Data* window

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

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

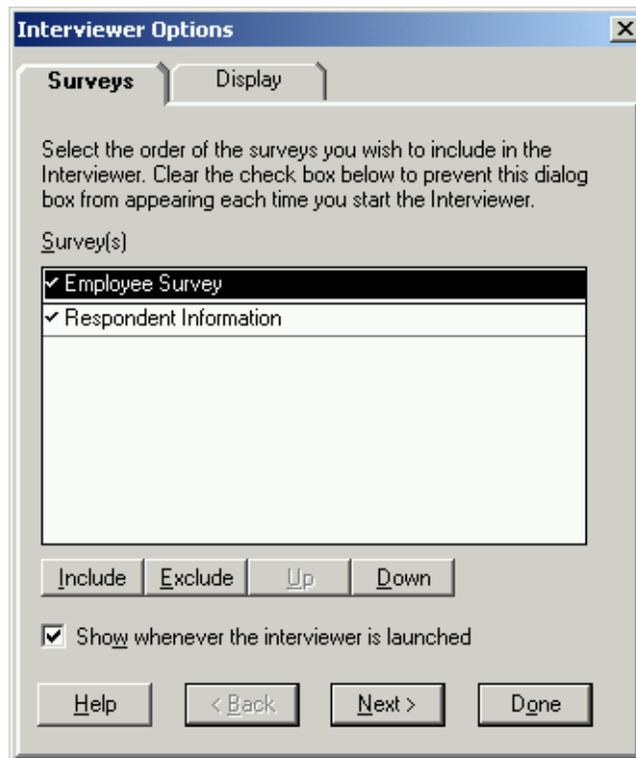


Figure 36: The *Interviewer Options* dialog box

- 6.4. If you are going to administer your survey both on paper and by telephone, click on *Respondent Information* and then click on the *Include* button. If you are going to administer your survey on paper but not by telephone or vice-versa, click on *Respondent Information* and then click on the *Exclude* button.

Including the *Respondent Information* survey allows you to see and possibly change the answer to the respondent question in the built-in *Interviewer*. Excluding the *Respondent Information* survey has the program automatically assign the answer for you without your seeing the question in the built-in *Interviewer*.

- 6.5. Click on the *Done* button.
- 6.6. Close the *Data* window.
- 6.7. If you made a change, click on the *Save* button on Survey Crafter Professional's toolbar or choose *Save* from Survey Crafter Professional's *File* menu.

Step 7

If necessary, use the *Data* window to manually answer the question in the second survey.

For example, if you are administering your survey on the Web and you skipped step 4, you will need to manually assign answers to the question in the second survey in the *Data* window *after* you import your web survey's data file.

Please note if you were able to follow steps 1-6, you should not need to perform this step.

To manually assign answers to the question in the second survey, do the following:

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

Survey Crafter Professional displays the *Data* window.

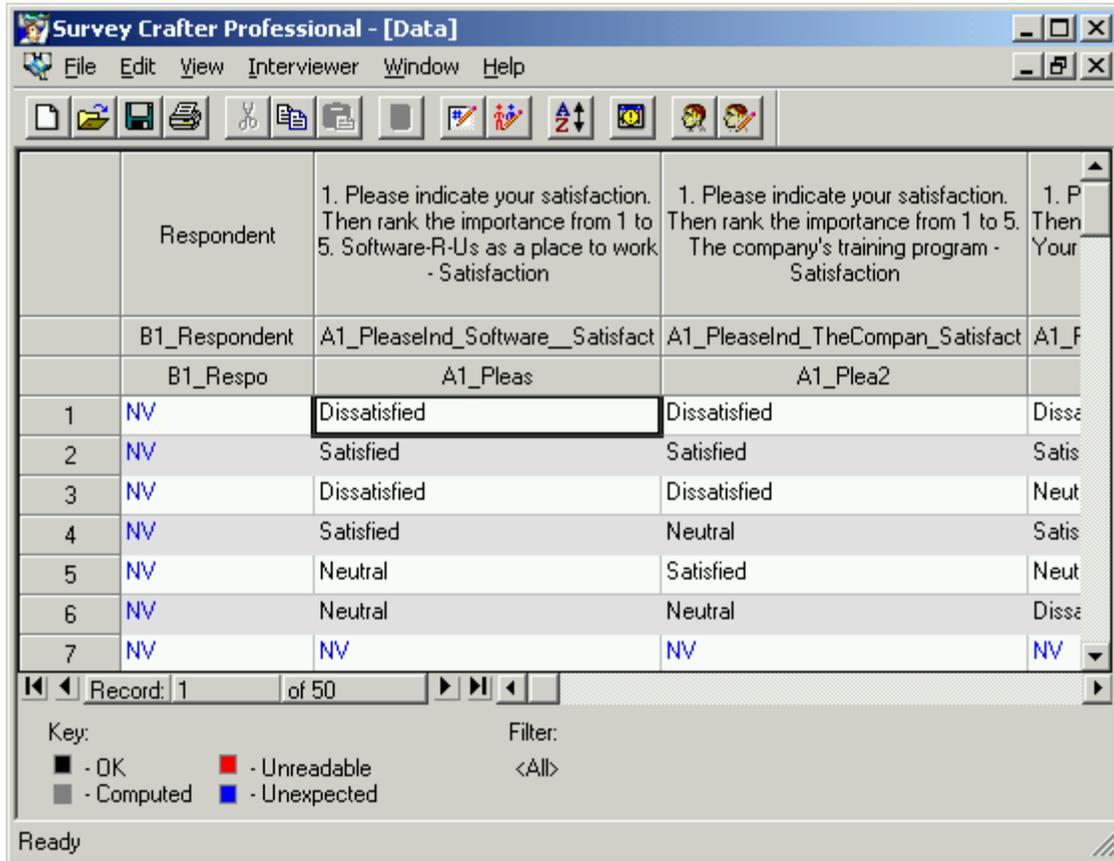


Figure 37: Survey Crafter Professional's *Data* window

- 7.3. If you want to assign a different answer to the question in the second survey for each respondent, double-click inside each cell in the column that corresponds to the question and choose the answer you want from the drop down. Continue doing this until you have assigned the answers you want for all of the respondents and then skip to step 7.19.

If you want to assign the same answer for all respondents who did not have the question answered for them, choose *Edit Filter* from Survey Crafter Professional's *Edit* menu and continue with the next steps.

Survey Crafter Professional displays the *Edit Filter* dialog box.

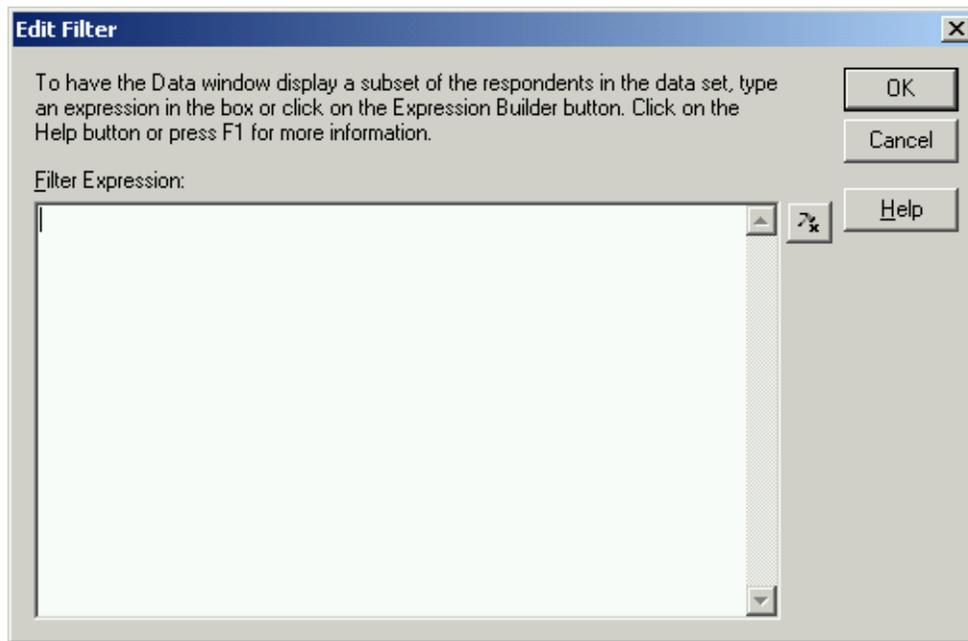


Figure 38: The *Edit Filter* dialog box

7.4. Click on the *Expression Builder* button to the right of the box under *Filter Expression*.

Survey Crafter Professional displays the *Expression Builder* dialog box.

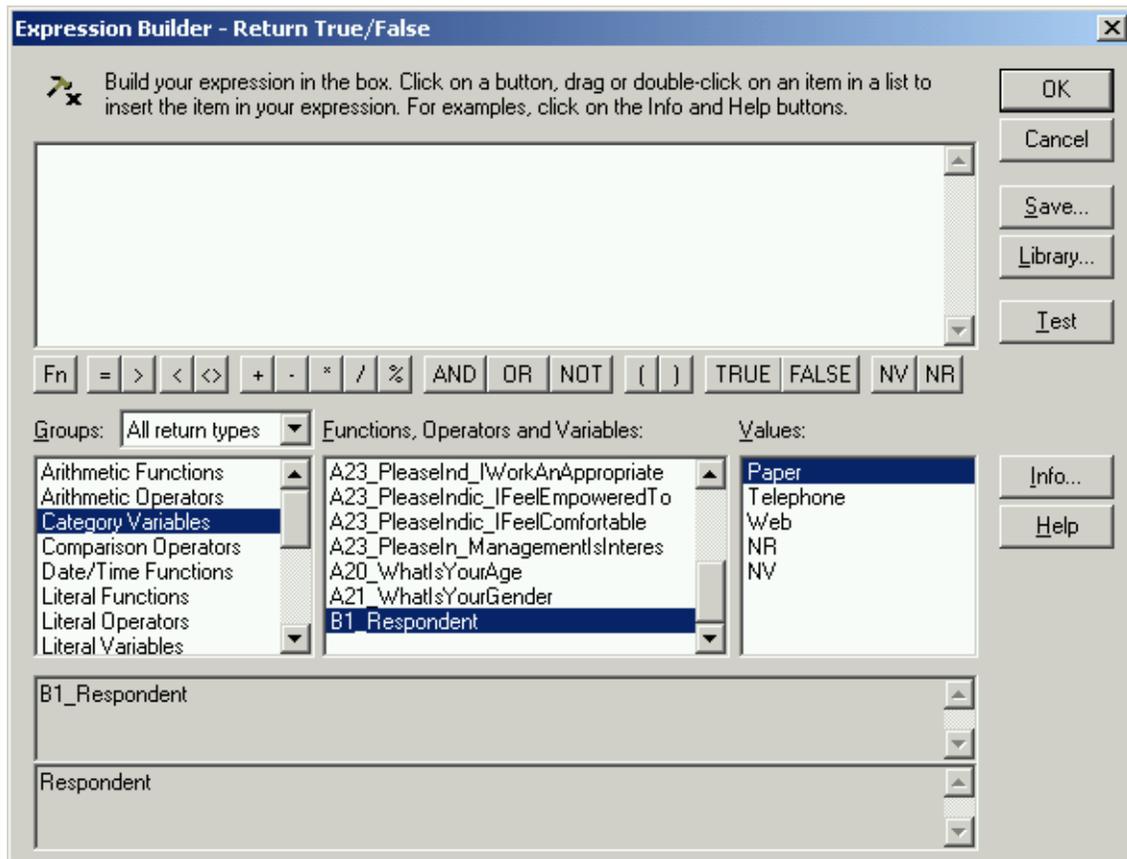


Figure 39: The *Expression Builder* dialog box

- 7.5. Click on *Category Variables* under *Groups* at the bottom left part of the dialog box.
- 7.6. Scroll to the end of the list of variables under *Functions, Operators and Variables* and double-click on the variable associated with question in the second survey.
- 7.7. Click on the = button below the expression box.
- 7.8. Click on the *NV* button below the expression box.
- 7.9. Click on the *OK* button.

Survey Crafter Professional updates the *Edit Filter* dialog box.

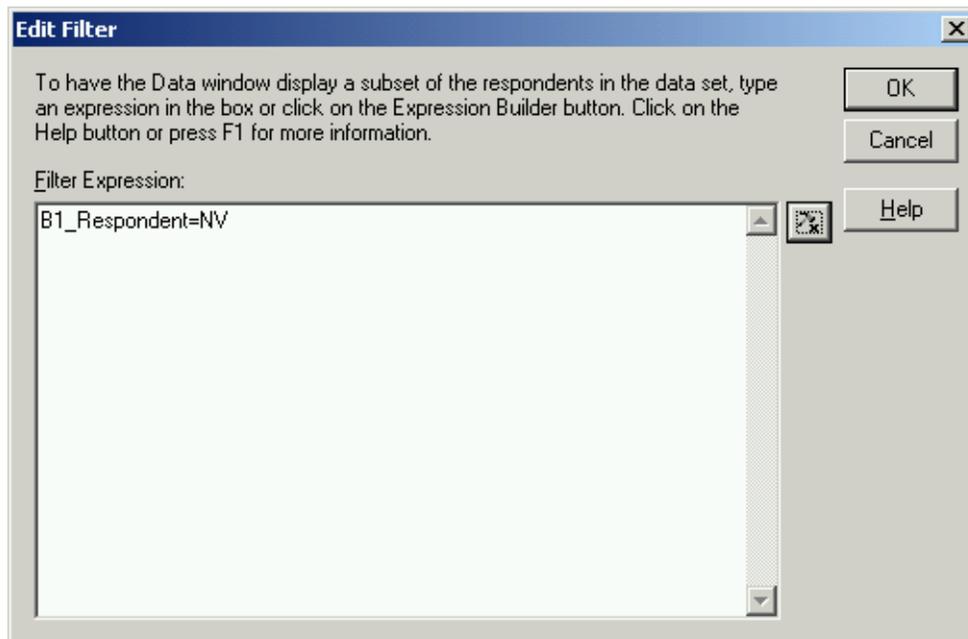


Figure 40: The *Edit Filter* dialog box

7.10. Click on the *OK* button.

Survey Crafter Professional updates the *Data* window.

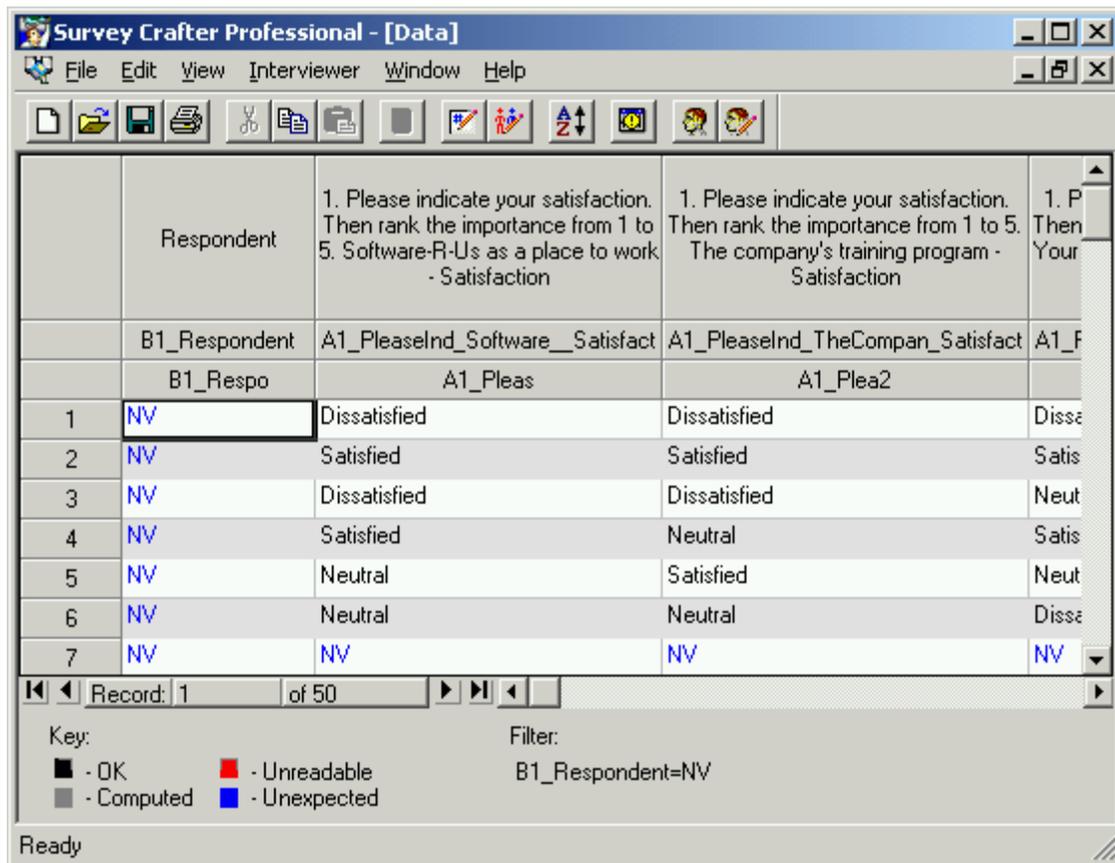


Figure 41: Survey Crafter Professional's *Data* window

7.11. Double-click on the column heading that corresponds to the variable associated with the question in the second survey.

Survey Crafter Professional displays the *Edit Values* dialog box.

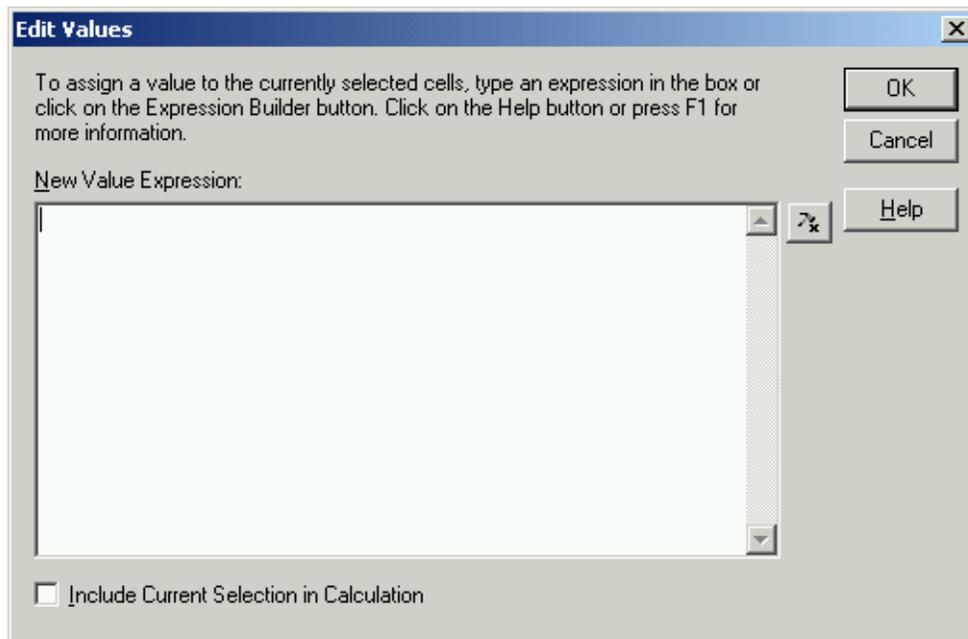


Figure 42: The *Edit Values* dialog box

7.12. Click on the *Expression Builder* button to the right of the box under *New Value Expression*.

Survey Crafter Professional displays the *Expression Builder* dialog box.

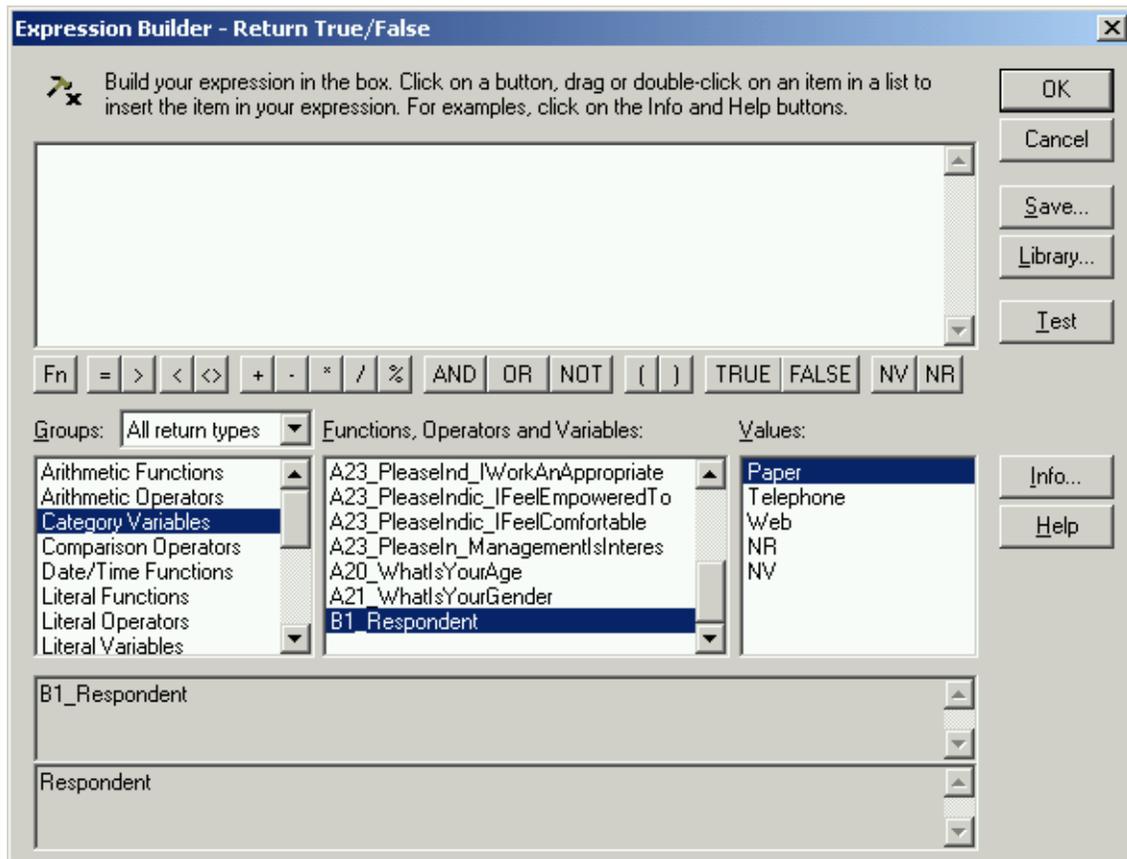


Figure 43: The *Expression Builder* dialog box

- 7.13. Click on *Category Variables* under *Groups* at the bottom left part of the dialog box.
- 7.14. Scroll to the end of the list of variables under *Functions, Operators and Variables* and click *once* on the variable associated with question in the second survey.
- 7.15. Under *Values*, double-click on the value you want to assign to all of the respondents for whom the question was not answered.

For example, if the respondents for whom the question was not answered completed your survey on the Web, double-click on *Web*.

- 7.16. Click on the *OK* button on the *Expression Builder* dialog box.

Survey Crafter Professional updates the *Edit Values* dialog box.

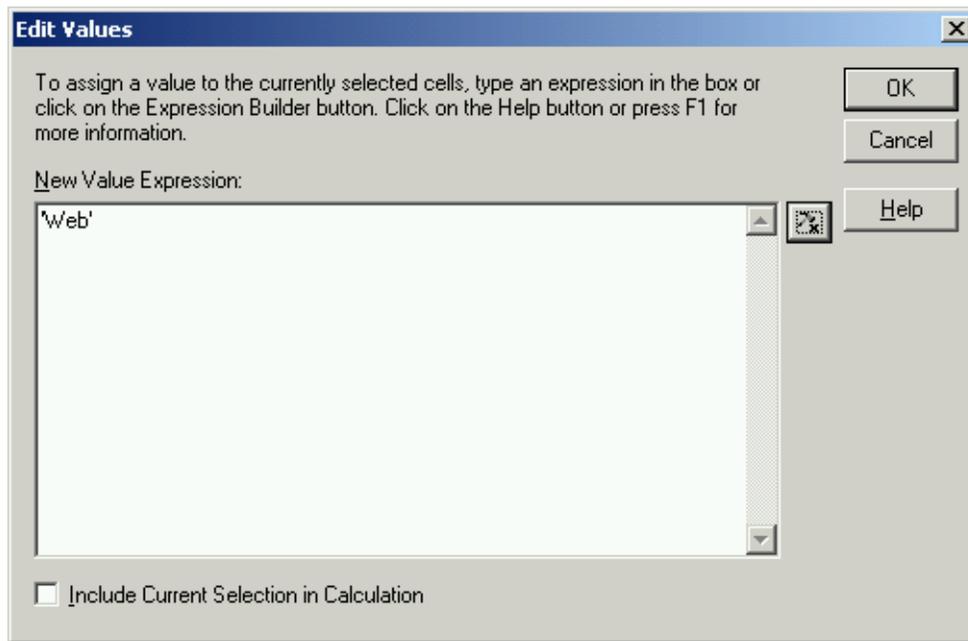


Figure 44: The *Edit Values* dialog box

7.17. Click on the *OK* button on the *Edit Values* dialog box.

Survey Crafter Professional updates the *Data* window.

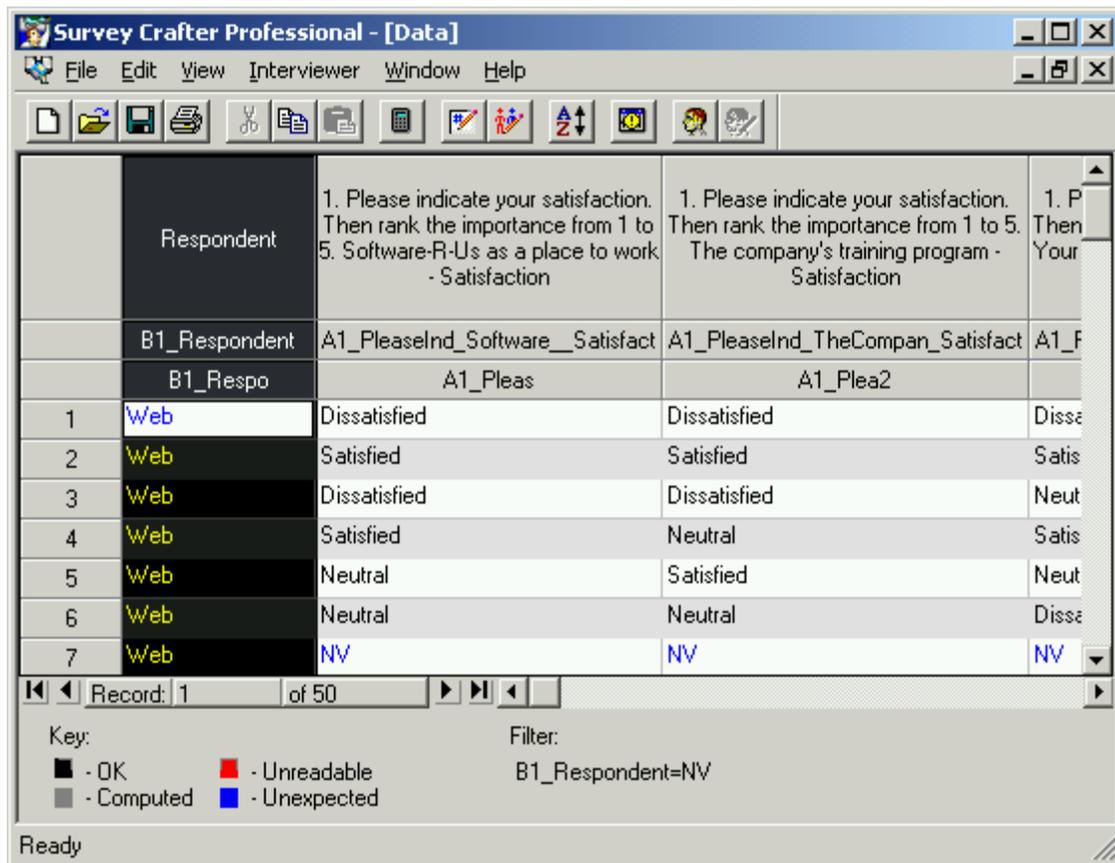


Figure 45: Survey Crafter Professional's *Data* window

- 7.18. Choose *Clear Filter* from Survey Crafter Professional's *Edit* menu.
- 7.19. Close the *Data* window.
- 7.20. Click on the *Save* button on Survey Crafter Professional's toolbar or choose *Save* from Survey Crafter Professional's *File* menu.