demographix

Demographix for Beginners 1

What is this? *One of three short documents that let new users get up-to-speed FAST with building complex surveys; creating in-depth reports using filters and crosstabs of data; and then moving on to easy-to-use panel management and email creation to get better responses from mailing lists. The documents in this series are: 1. Survey Building Essentials; 2. Analysis & Reporting Essentials; and 3. Email & Panel Management Essentials*

Survey Building Essentials:

1. The Main Interface:

Workspace area: When you log-in you'll see the surveys you have permissions to view or use shown on the Workspace at left. There are three viewing tabs you can click on: *Recently Accessed* is the default view; *Status View* shows surveys listed according to whether they're in production, live, closed to responses, etc; and *Category View* shows them in user-defined category folders. These can be categorised in any way you like – by department, type, year, whatever category headings you choose.

Hot tip: Initially you may see no surveys (until you create one) or just one (which you've been given permission to edit). If you can see none, click on the Status tab and check the In Production folder.

Information area: Also shown in the main interface is the Information Area – the column at right headed "From the Helpdesk". This is a random selection of five FAQs from our online Helpdesk, and beneath this a scrolling panel with all the latest updates from the team at Demographix (*at the right-hand side of the screen, as shown above*). Keep an eye on the Updates for news of new tools and functionality as it's added!

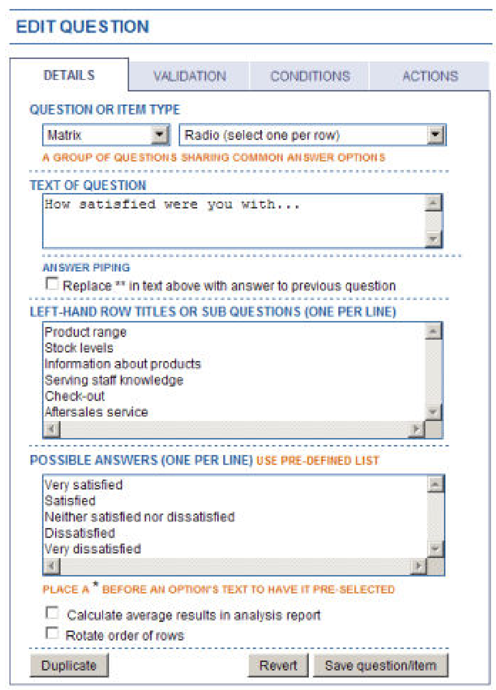
Account Functions menu: At top of the screen is a menu of functionality available to you. The services shown here depend on your log-in status or the status of your account – so some of the following options may not be shown. Click on "Surveys" to see the top-level view of surveys available to you (the default view); "Panels" to access the panel management suite; "Lists" to create and edit lists of standard frequently used answers to questions (e.g. a list of countries in the world); "Media" to upload and edit images, audio and video files; "Scrapbook" to place questions for re-use in other surveys or sharing with others; "Search" to search the contents of all your surveys; and "Manage Your Account", where you can keep your contact details up-to-date (essential if you want our Helpdesk to contact you when you have a query) or change your password. Some top-level log-ins will also have access to survey and user management functionality.

2. Building and Editing a Survey:

EDIT option: When you're ready to edit your survey, simply click on the EDIT option beneath the survey's name. The Editing interface is very similar to the main interface. It shows the contents of the survey in the Workspace area, and the Survey Properties at right. Note also a second menu has appeared at the top of the survey, beneath the Account Functions. These are the functions available for this survey to you (depending on your permissions levels), and can include: Survey Properties, Appearance, Update/Preview Pages, Publish.

Survey Properties: Here you can edit the name of the survey, an internal reference, and a range of other survey details right down to the text to display when a survey is closed to responses (ie after you've stopped collecting data). Once you've previewed your survey for the first time, there will also be a URL showing that will give access to your survey. Note also the details available on the Summary tab; and if you have a log-in that allows you to assign access permissions for this survey to other colleagues or clients, there will be two tabs available that will enable this.

Adding questions: As you add new items to a survey (some text, a question, a new page, etc), or click on existing items to change them, then the properties for that item will show in the right-hand space where the Survey Properties was. In a new survey, for instance, you will see the title “First page - click to edit page title” and a text item: “First question - click to edit” in the workspace. By clicking on either you can alter them to suit your needs. For instance, click on “First question - click to edit” and then either change its wording as the intro to your survey, or change it to a question by using the first drop-down box in the Details tab (e.g select the “Single choice” question option, and then the “Horizontal” in the next drop-down box). Add the text of your question in the text field below, and the list of possible answers (one per line) under that.



When you save the question it will appear in the Workspace as a single-choice question with answers arranged horizontally. It’s easy to make changes once a question has been saved – e.g. choose “Vertical” to have the answers showing as a list, or “Multi-choice” if your question permits several responses. Then Save again. More complex questions, *such as the matrix type shown right*, will require a question text, row titles and answer options.

Hot tip: Have a good look at the different options available to you under the QUESTION OR ITEM TYPE pull-down menu (question types include Matrix, Write-Ins, Sliders, Multimedia, and more!) and also note that this menu includes items you can add to a survey page as well (Text boxes, Images, and Horizontal rules).

Page breaks: Once you’ve added your introductory text and a few questions, you should preview your survey by clicking the “Update/preview survey” option in the Survey Functions menu at top right. This will show you what your survey will look like for potential respondents. If you have added quite a few questions, you will see that respondents will need to scroll down the page, and this is something we do not recommend. A lot of questions on a single page is off-putting to respondents (it looks like too much hard work), so we suggest you break your survey up into pages with 2-3 questions per page. This will greatly increase your response rates, and also make your data more reliable as it helps focus respondents on one or two questions (or small groups of questions) at a time. To add a page break, simply click on the question that will be the first one on the new page. Click the Actions tab, and select “Insert page break before”.

Actions tabs: Notice that there are quite a few important actions available on this tab: here you can select actions such as: deleting a question, duplicating a question, or copying the question to the scrapbook. If you click on a page title to enable a Page properties box, then you will also see options such as Re-order questions on a page, or Re-order the pages in the survey.

Hot tip: Demographix gives you full flexibility to re-order your questionnaire, but we recommend that every time you do this, you should also update and preview the survey, and check that all is in order.

Conditionality tabs: Notice that questions can be made conditional on how a respondent answered a previous question. So, you can have a series of questions that you only show to respondents who answer Female to an initial “Are you: M/F” question. Pages can also be conditional. So if you have 4 questions just for women, put them on a page and make the Page conditional on whether they ticked the Female option in that question.

Hot tip: Conditionality is an online version of “Jump to Question X” statements on paper surveys. But the logic is different: rather than thinking “jump to”, you need to get in the mind frame of “Show them this if they answered x (or x, y or z)”. The most common conditional question is a Write-In, only shown if they tick “Other” (or “Other - please specify”). We suggest you try a few conditional questions and test them in Preview mode.

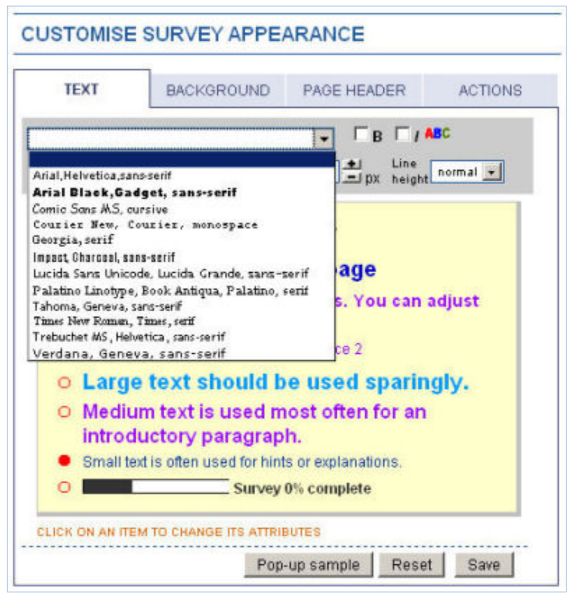
Validation tab: You can also make questions compulsory, or validate an answer to a write-in as a survey is being answered. These functions are found on the Validation tab of a question's properties. We recommend a judicious "light-touch" use of compulsory questions – if you make everything compulsory your response levels will suffer. Be careful to allow for all possible responses on a compulsory question – if a respondents option is not included, they will give you incorrect data or not complete.

3. Preview, Test, Change Appearance:

Update/preview: We strongly recommend that you preview and test your survey as you build it on a regular basis. Be careful not to use the Publish button until your survey is fully built. Previewing allows you to test out all functionality. You may even wish to share the survey in development with others – simply circulate the URL for them to preview it.

Hot tip: If you want to print out a copy of the survey, or send a version of it in PDF to someone else, then note the "Printer-friendly version" option at the top right of the workspace in Edit mode. This will create a version of the survey that is fully checkable – for example, all options in a drop-down menu are shown, as well as full conditionality and validation.

Appearance: Once you've started previewing your survey you'll want to start making changes to the appearance of the survey. Every survey has its own stylesheet, allowing them to be fully customised. You can easily add logos to the top of every page of the survey, change its background colour, change fonts, font size and text spacing, and change the progress bar (if you're using it).



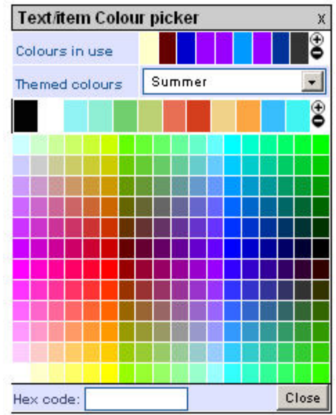
Clicking on the Appearance option in the Survey menu bar gives the control panel with the Text tab selected as default (*shown at right*). Demographix allows you to control the style of different textual elements of your survey: Survey title, Page headers (if shown), Question text, Question answers, and three types of textual elements – large text, medium text and small text. You can also change the colour and fonts of the progress bar.

To make changes to one of these items first select it by clicking on the open red circle at its left. It will change to a full red circle when selected. Note in the example at right that we have selected Small text to make our changes to. Now you can change its font face (using the pull-down menu as shown), tick the B box to change it to **bold face** or the *I* box to change to *italic face*. The coloured **ABC** symbol lets you change the colour of the font – either by selecting from a palette or by using web hex codes (such as #FF0000 for solid red).

Hot tip: Note the other options for each text item: font size, Space above, Space below and Line height. Space above allows you to add more space, for instance between questions or around text items. Allied with line height you have a lot of power to alter the look of your survey so that it can look anything from "tight" to "spaced out".

Save: When you have made your changes you can click the "Pop-up sample" button to see the effect. When you are satisfied with the results, press the "Save" button to save your new stylesheet. However, the style changes will not be applied to your survey until you have pressed the "Update/preview" option on the Survey menu.
Note that there are three other tabs on the Customise Survey Appearance control panel: Background, Page Header, Actions.

- The **Background tab** gives you tools to customise the background applied to every page in your survey. You may want to alter the colour of the background, or apply a banner image that you have uploaded through the Media option in the Account Functions menu. You can have repeating images, vertically and horizontally.
- The **Page Header tab** lets you change the header on each page: you can use the survey title, an image, or nothing. The Survey title is default, though often it is replaced by a logo – either left-aligned, centred or right-aligned. The survey title is then given on the first page by using a large text element. On subsequent pages just the logo appears, and page titles are used to signify the focus of what the questions on that page are about.
- The **Actions tab** has one of the most powerful Appearance options: here you can apply a style sheet from another survey. So, if a template survey has been created that prescribes textual elements and logos of your brand, the style sheet from that template can be applied to your new survey.



Hot tip: The Colour Picker is a pop-up that appears when you want to control the colour of a text element or the background colour. There is a lot of power in this controller. The top row (labelled "Colours in use") shows the colours currently in use for the survey. Using this you can easily match colours between elements. The colours are shown from left to right in order of how they are listed on the Text tab – from Survey title to Progress bar. Hover over each to see what they are. If, for example, you wanted to match the progress bar colour to the survey title colour, simply click on the survey title colour shown on this row. Below this are a range of "Themed colours" in a drop-down list. Here you can select palettes of colours to create a harmonious looking survey. Use the circled + and – symbols at right to increase or decrease colour brightness.

4. Publish and collect data:

Ready to publish? Once you've finished building your survey, have made alterations to the appearance, have sent round the URL to others to test and check, and are ready to start collecting data, then it's time to press the Publish button. This option is available to all log-ins except Colleagues and Clients. The Publish button is the last item, at right, on the Survey menu. Colleagues will have to ask the manager who gave them access to the survey to publish it for them.

Publish: When you publish your survey, the Demographix system creates will automatically create the back-end system to collect data, and the range of options to analyse the data. The In Production watermark surrounding your survey will now be missing. The survey is now live, and anyone who clicks on the URL, completes the survey and clicks "Submit Answers", will have their responses saved. It is important that you have finished testing your survey at this stage, or test data will be saved. The only way you can get rid of test data is to Unpublish the survey (an option only available if there are fewer than 25 responses), which will delete all data collected and return the survey to In Production mode. The Unpublish option is found under the Survey Properties menu/Details tab, on the Survey status drop-down menu.

Hot tip: A frequently asked question is: can I make changes to a survey after it's published, for instance, I forgot to add a question answer. **The short answer is No!** Once the survey is published, very few changes can be made. You can alter the text of a question, if you've made a spelling mistake, but you can't add, edit or rearrange answers. The only way you can make these changes is to Unpublish your survey (as above), and that is only possible if you spot your error before more than 25 responses have been submitted. We **STRONGLY ADVISE** you to spend a lot of effort testing your survey before you publish. In the last resort, you can submit a Helpdesk ticket or phone Helpdesk to discuss your problem with us. If we can help, we will.

Circulating the URL: You can now circulate the URL of the survey via email links or website links. If you are using Panelwise, our emailing and panel management system, refer to the third document in this series for tips on email best practice for maximising response levels. There are a couple of other things to note. The Demographix system offers:

- Friendly URLs: Contact helpdesk if you need a friendlier URL that is to be made available in printed form. Copying a standard Demographix survey URL will invariably lead to mistakes and frustration. A FURL takes the form: www.completeasurvey.com/yourbrand or www.yoursurvey.co.uk/ABC2010, etc
- Sources: You can add tags to the end of a survey URL to track where responses are coming from. For example, you could add ?website or ?email. We capture these and make them available in the analysis interface.

Closing to responses: Once you've reached your cut-off date, you can close your survey to responses. The "Close to responses" option is found under the Survey Properties menu/Details tab, on the Survey status drop-down menu. We STRONGLY ADVISE you do this on a regular basis, in order to preserve the integrity of your data. Surveys left open to responses will mean false data can be added.

Best Practice:

Finally, a few best practice tips to ensure your survey gets good results and saves you time!

- Draft your survey in Word or a text editor, define your conditional logic, and then cut and paste into Demographix.
- Preview and test as you build your survey – in particular test your conditionality if you make changes.
- If you can't see your changes, remember to use the Update/preview button – it builds a new version of the survey each time.
- Radio buttons (single choice) and tick boxes (multi-choice) answers: Don't use tick boxes for single-choice questions!
- If you ever get lost, click the Your Surveys option at top centre of screen, to get back to the top level.