

WINQUERY[®]

Exploring

Version 24



Version 24

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Editor: Scott Smith

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Getting Started

Introducing WinQuery

WinQuery is powerful and easy-to-use software for networked phone interviewing. You can also use WinQuery to conduct in-person or tablet interviewing. Additionally, you can host Internet studies online when WinQuery is used in conjunction with QueryWeb hosting service provided by The Analytical Group, Inc.

WinQuery lets you:

- ✓ Create questionnaires
- ✓ Dial using VoIP technology
- ✓ Conduct phone interviews in multiple languages
- ✓ Create questionnaires for Internet interviewing using QueryWeb (hosting service)
- ✓ Conduct phone interviews in domestic and international time zones
- ✓ Dial internationally using the canonical phone format
- ✓ Prepare and manage domestic and international sample
- ✓ Manage calling patterns and callbacks
- ✓ Use predictive dialing capabilities (optional fully-integrated product)
- ✓ Play multimedia files
- ✓ Record open-end responses
- ✓ Capture an entire questionnaire to an audio file
- ✓ Manage and track progress of interviewers
- ✓ Visually monitor stations
- ✓ Code and edit data
- ✓ Easily output data files including WinCross®, Excel®, .sav and other delimited file types.
- ✓ Convert batch files from prior versions of WinQuery to WinQuery 24.
- ✓ Calculate time zone percentages for domestic and international dialing
- ✓ Analyze data and report results
- ✓ Conduct in-person or CAPI interviewing

WinQuery makes it easy for anyone to create, test and administer questionnaires. You enter questions and answer choices and WinQuery applies initial logic based on common assumptions. WinQuery features can then be used to customize your questionnaire.

You can use WinQuery's **Autopilot** feature for questionnaire testing. **Autopilot** performs automatic test interviews and produces test data based on specifications you select.

Supervisors use the uncomplicated features for study setup and report generation. Interviewers need very little briefing for questionnaire administration. A network environment allows interviewers working on a given study to have access to the same questionnaire, sample and callback files. What's more, they also update the same disposition and quota files.

In addition to phone and tablet interviewing, WinQuery can be used to prepare questionnaires for Web-based interviewing over the Internet (using QueryWeb hosting by TAG). Regardless of which mode(s) you choose, your WinQuery questionnaire need only be programmed once. You can recruit respondents, start interviews on the phone and finish them on the Web without ever losing control of sample or quota. The same questionnaire can be administered personally, on the phone, over the Internet or any combination.

It's easy to manage data using WinQuery. It includes options for marginal, crosstab, numeric progression and sigma analysis reports. You can even export data files for further processing using statistical and crosstabulation software, such as the popular WinCross, also from The Analytical Group, Inc.

Exploring WinQuery

This evaluation software is the fully-featured WinQuery product which you can use for 30 days— although we think you'll want to use it for much longer than that!

This booklet, an abridged version of the WinQuery User Guide, includes information inviting you to explore WinQuery's powerful features. Included is a hands-on tutorial with which you can try WinQuery's innovative, interactive questionnaire design capabilities first-hand. However, we think you'll find WinQuery so easy to use; you may want to just start exploring on your own!

To do so, open the **PLAYQUE** study, installed with your WinQuery software, then explore the various menus and their options. Useful for training, **PLAYQUE** includes a complex questionnaire as well as study setup specifications.

Try the extensive online **Help**, which includes detailed information for all WinQuery features. Additionally, feel free to call us for friendly customer support at 480.483.2700.

For more information about WinQuery, phone us, visit our Website at www.analyticalgroup.com and/or send an e-mail to info@analyticalgroup.com.

Conventions Used in This Tutorial

As you proceed through the tutorial, the only steps you will want to perform are indicated by a blank square (□). Everything else is narrative, so watch for the squares. Additionally, the squares are provided so that you can check each one as you complete a step. This helps ensure a successful tutorial experience.

Consider the following example:

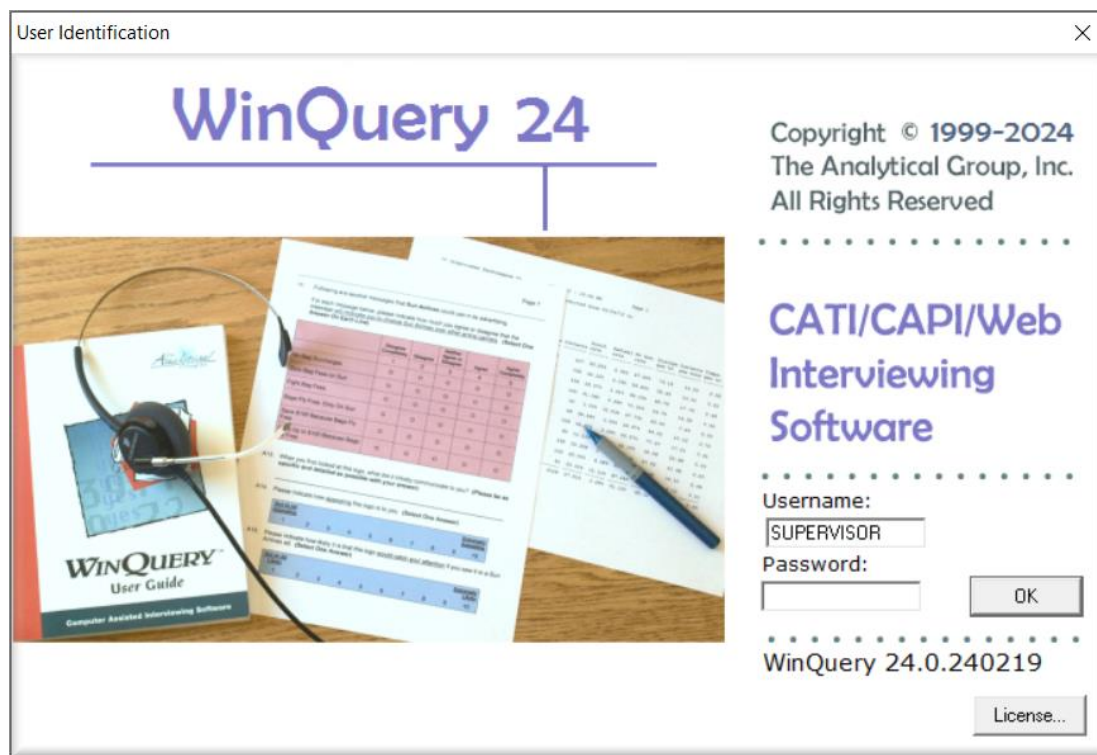
- Enter **User**, then press **ENTER**.

Starting WinQuery

There is only one authorized user, SUPERVISOR, after you have completed the WinQuery installation. SUPERVISOR is the only user having authority to add additional users to WinQuery. The SUPERVISOR should be the only user authorized to change System Preferences. Adding a password to the SUPERVISOR is recommended to prevent any unauthorized modification of System Preferences. Adding passwords for all users is optional but recommended. To do so, use the **Options|Configure Users** option.

- Start WinQuery.

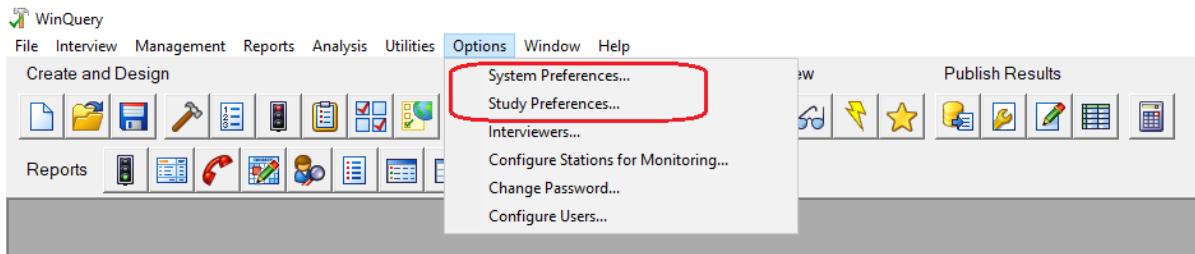
As you do, the **User Identification** dialog box is displayed.



- The **User name** of SUPERVISOR is prefilled for you and a password is not required for this evaluation.
- Select **OK** or press **ENTER**.

Note: A password is only required if a password was added for the SUPERVISOR using **Options|Configure Users**.

Customizing WinQuery



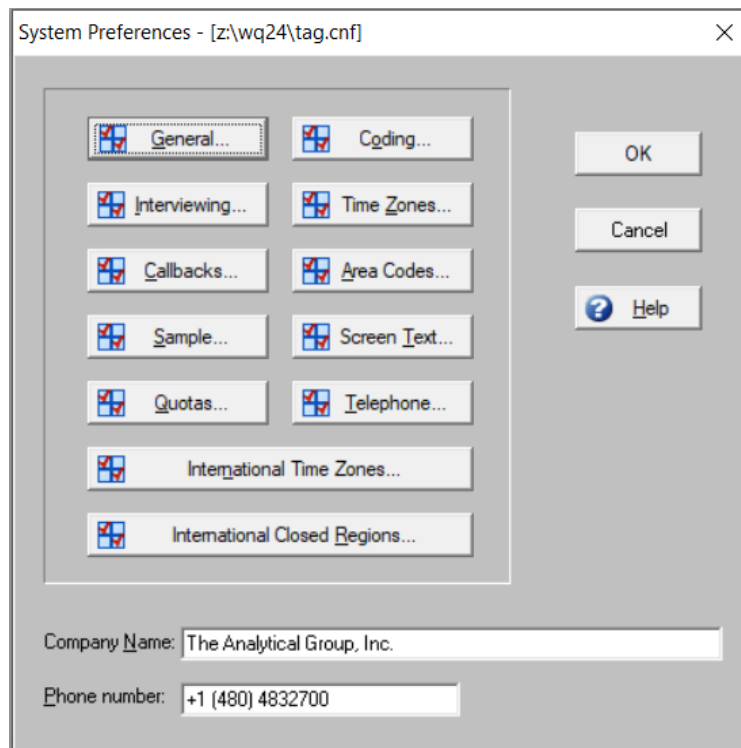
Settings in **Options|Study Preferences** are used to customize a single study. Use **Options|System Preferences**, on the other hand, to make global WinQuery settings for your interviewing center.

Before you begin using WinQuery to create studies, at a minimum you'll want to use **Options|System Preferences** to:

- ☐ Enter your company name in the **Company name** field.
- ☐ Enter your company phone number in the **Phone number** field using the canonical phone number format. The canonical phone number format is a directory numbering format used worldwide. The canonical number is a string containing the following structure:

+CountryCode Space [(AreaCode) Space] SubscriberNumber

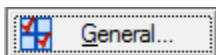
Example: +1 (480) 4832700



You will also want to specify the time zone and area code for your interviewing center using **Options|System Preferences|General**. Your phone system, dialers and modems are customized using **Options|System Preferences|Telephone**.

See the next two pages for information about the **General** and **Telephone** options.

General Option



The **General** option lets you make specifications for your interviewing center.

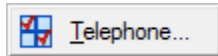
You can specify your local time zone and area code and make any other global settings that apply to all studies. You can leave items blank, if desired.

A screenshot of the 'General' dialog box. The dialog has a title bar with 'General' and a close button. It contains several sections: 'Time zone where interviewing is being conducted:' with radio buttons for Eastern, Central, Mountain (selected and circled in red), Pacific, and Hawaii/Alaska; 'Ending position for word wrap (5-72):' with a text box containing '72'; 'Date of end of study: (MM/DD/YY)' with an empty text box; 'Time of end of study:' with a text box containing '12:00 AM'; 'Local area code:' with a text box containing '480'; a section with four checkboxes: 'Watch autopilot when on' (checked), 'Allow gaps in single record data file' (unchecked), 'Single record data output' (checked), and 'Hide page headers on WinQuery reports' (unchecked); and 'Empty old temporary files:' with a trash icon and an 'Empty' button. At the bottom, there are four buttons: 'StrataDial...', 'StrataDial.VC2...', 'PRO-T-S...', and 'VoIP...'. At the very bottom are 'OK', 'Cancel', and 'Help' buttons.

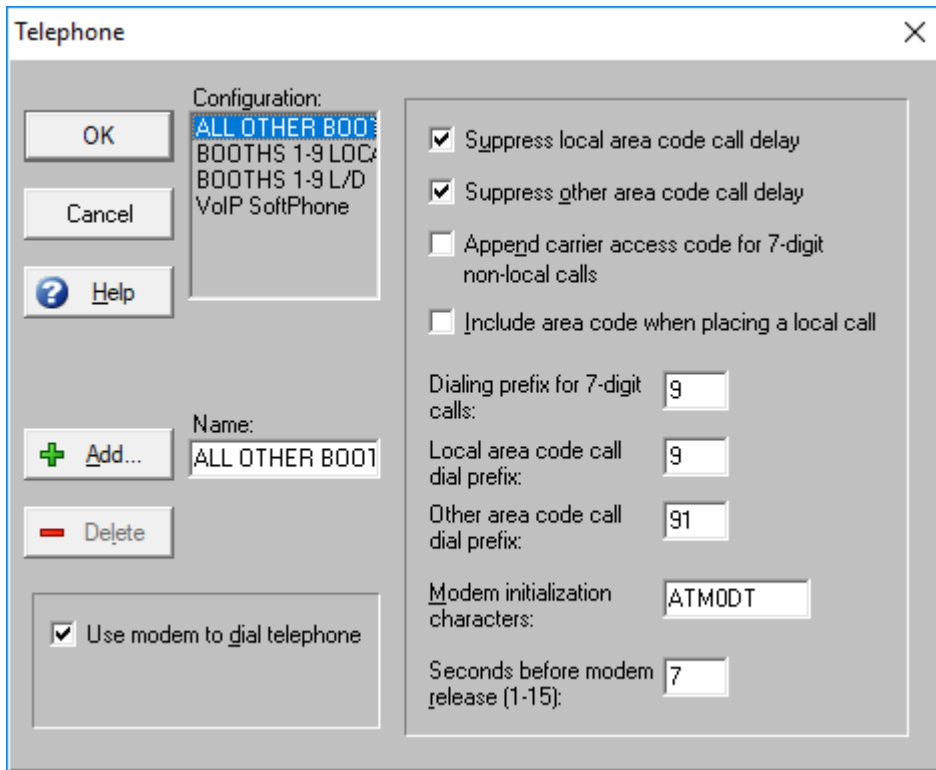
- ☐ Specify your local time zone (Mountain is shown above).

You can make changes whenever you like to **Options|System Preferences** or **Options|Study Preferences**. You'll find additional details for every item and procedure in WinQuery's online **Help**.

Telephone Option



The **Telephone** option lets you make specifications for your phone system, dialers and non-TAPI compliant modems.

A screenshot of the "Telephone" configuration dialog box. The dialog has a title bar with "Telephone" and a close button. On the left, there are buttons for "OK", "Cancel", "Help", "Add..." (with a plus icon), and "Delete" (with a minus icon). Below these is a checkbox labeled "Use modem to dial telephone" which is checked. In the center, there is a list of configurations. The first one, "ALL OTHER BOO...", is selected and highlighted in blue. Below the list is a "Name:" label followed by the text "ALL OTHER BOO1". On the right side, there are several settings: three checkboxes for "Suppress local area code call delay" (checked), "Suppress other area code call delay" (checked), and "Append carrier access code for 7-digit non-local calls" (unchecked); a checkbox for "Include area code when placing a local call" (unchecked); three text boxes for "Dialing prefix for 7-digit calls:" (9), "Local area code call dial prefix:" (9), and "Other area code call dial prefix:" (91); a text box for "Modem initialization characters:" (ATMODT); and a text box for "Seconds before modem release (1-15):" (7).

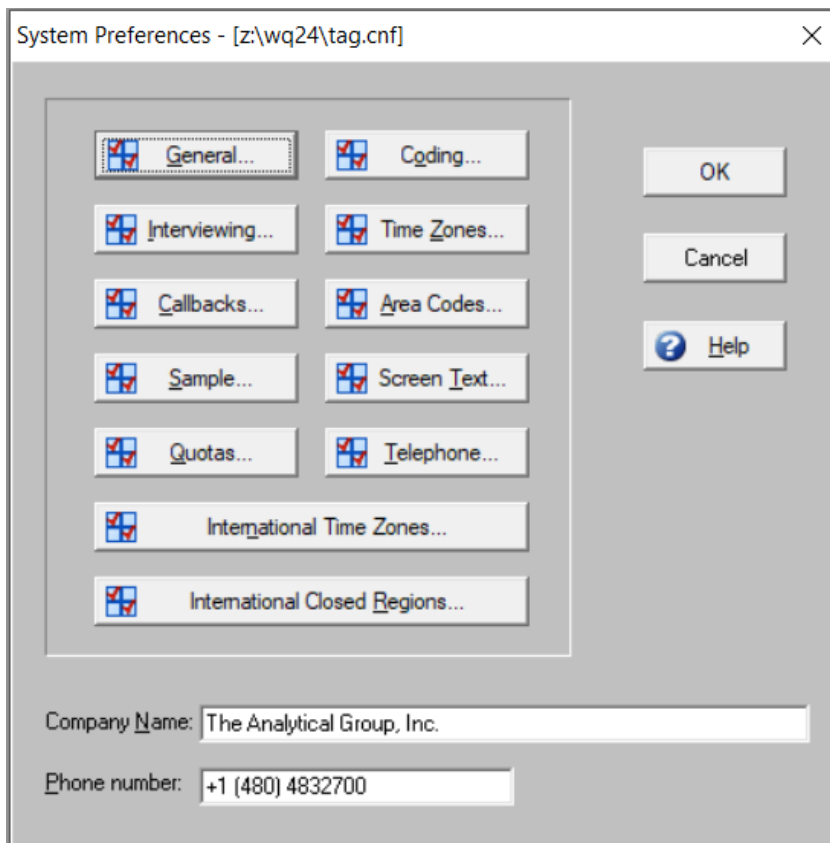
Specify settings for your particular phone system and modems.

You can specify up to 56 dialing configurations. If there is more than one configuration, interviewers will be prompted to choose a dialing configuration from a list when logging into the **Conduct Interview** interviewing module.

WinQuery's online **Help** includes explanations for each setting.

Other Settings Overview

Here is an overview of the other global options available in **Options|System Preferences**:



Use **Interviewing** to customize the way questionnaires operate, including:

- ✓ Interviewer features
- ✓ Phone number display
- ✓ When to start interview timing
- ✓ Setting password for **View|Preferences** in **Conduct Interview**
- ✓ Text colors and Font in **Conduct Interview**
- ✓ Set goal minimum and maximum interview times for **Conduct Interview (Study Preferences setting)**

Manage the way callbacks are handled using **Callbacks**. This includes:

- ✓ Routing
- ✓ Tracking
- ✓ Attempt frequency
- ✓ Qualifications

Sample lets you manage sample, including:

- ✓ Sample settings
- ✓ Calling window settings
- ✓ Maximum and busy attempt specifications
- ✓ Number of sample records per station

Quotas lets you specify:

- ✓ To ignore quota priorities or quotas within quotas
- ✓ The seconds between fatal quota checking

Manage the coding process using **Coding**, including:

- ✓ How you want information displayed
- ✓ Which contacts to code
- ✓ How often to save coding work

Time zones lets you manage the calling in each time zone. You can specify:

- ✓ Calling times
- ✓ Quotas
- ✓ Call distribution percentages

You can also disable a time zone or view the current quota count by time zone.

Customize the area code list and turn area codes on and off for each time zone using **Area codes**.

Use **Screen text** to enter text for the:

- ✓ Callback Introduction Screen
- ✓ Callback Message
- ✓ Interviewer Message

International time zones lets you set up time zones for other countries. You can specify:

- ✓ Country description
- ✓ Country code
- ✓ Area code and prefix GMT (Greenwich Mean Time) offset
- ✓ Whether the country observes a system for daylight savings time

International closed regions let's you disable calls to international regions. This option is useful when there is inclement weather or a political situation in a specified country/region.



Global settings you want to use for all studies should be made in **Options|System Preferences**. Settings for an individual study should be made in **Options|Study Preferences** and override the **Options|System Preferences** settings.

Using WinQuery

Let's see how easy it is to create questionnaires in WinQuery using a simple example.

You can enter question and answer text from within WinQuery using the **Management|Build Questionnaire|Questions** option or you can use **File|Import Questionnaire Text** to import an ASCII file of question and answer text you've created using your text editor or word processor.

Whichever method you choose, entering text requires a few rules described in this section. This tutorial features the **Management|Build Questionnaire** method of creating a questionnaire.

WinQuery automatically assigns initial logic to your questionnaire text. This logic is based on three assumptions:

- ✓ Closed end questions are single-punch
- ✓ Open end questions are multi-punch
- ✓ Each question automatically branches to the next question

The initial logic is assigned when you import a text file using **File|Import Questionnaire Text** and the first time you exit **Management|Build Questionnaire**. Of course, it's easy to make changes to these initial assumptions.

Whichever method you use for initially entering text, use the **Management|Build Questionnaire** options to make changes and additions. You specify:

- ✓ Answer choice options
- ✓ Question types
- ✓ Whether questions are multi- or single-punch
- ✓ Branching

You can write complex logic using conditionals and set-up grid questions. WinQuery also lets you choose to loop, shuffle and random-start a series of questions, create side-by-side grouped rating questions, as well as search and replace text.

Additionally, WinQuery's **Expert Version** and **Master Expert** are fully-integrated into WinQuery and let those familiar with creating and editing WinQuery questionnaires enter code into the text editor of their choice and then import this code directly into WinQuery. This is especially useful for proficient programmers who would like to bypass dialog boxes within WinQuery. (**Expert Version** is an optional module available for purchase from The Analytical Group, Inc. and **Master Expert** is included with the purchase of **Expert Version**.)

Quick-try Tutorial

This tutorial introduces you to many **Management|Build Questionnaire** options. It shows you how you can quickly create a questionnaire, make changes and use **Interview|Conduct Interview** to view and test your questionnaire.

You'll start by asking these three questions:

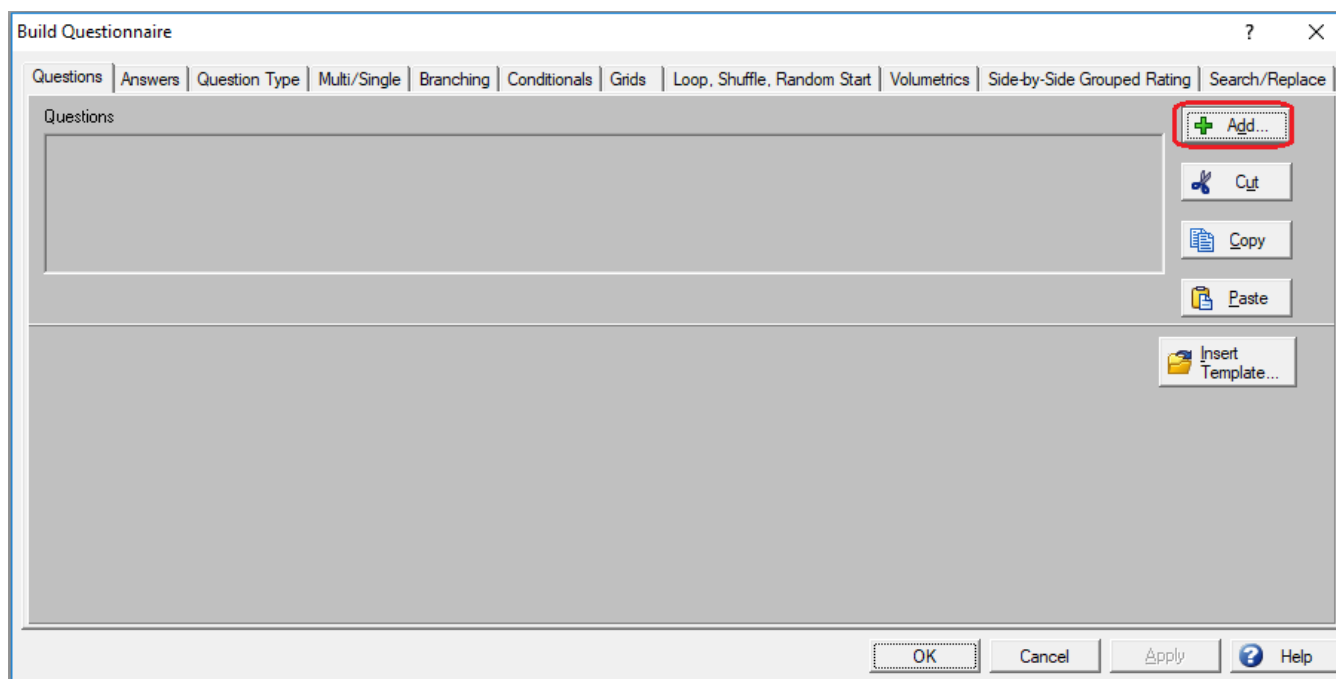
Do you have a bank ATM/debit card?
Yes
No
Which regular credit card do you most often use?
Visa
MasterCard
Discover
Other
What do you dislike most about ATM/debit cards?
Specify

The first part of the tutorial includes these procedures:

1. Entering question and answer choice text
2. Saving a study
3. Viewing a questionnaire report
4. Modifying branching
5. Modifying question types
6. Making text changes
7. Viewing changes

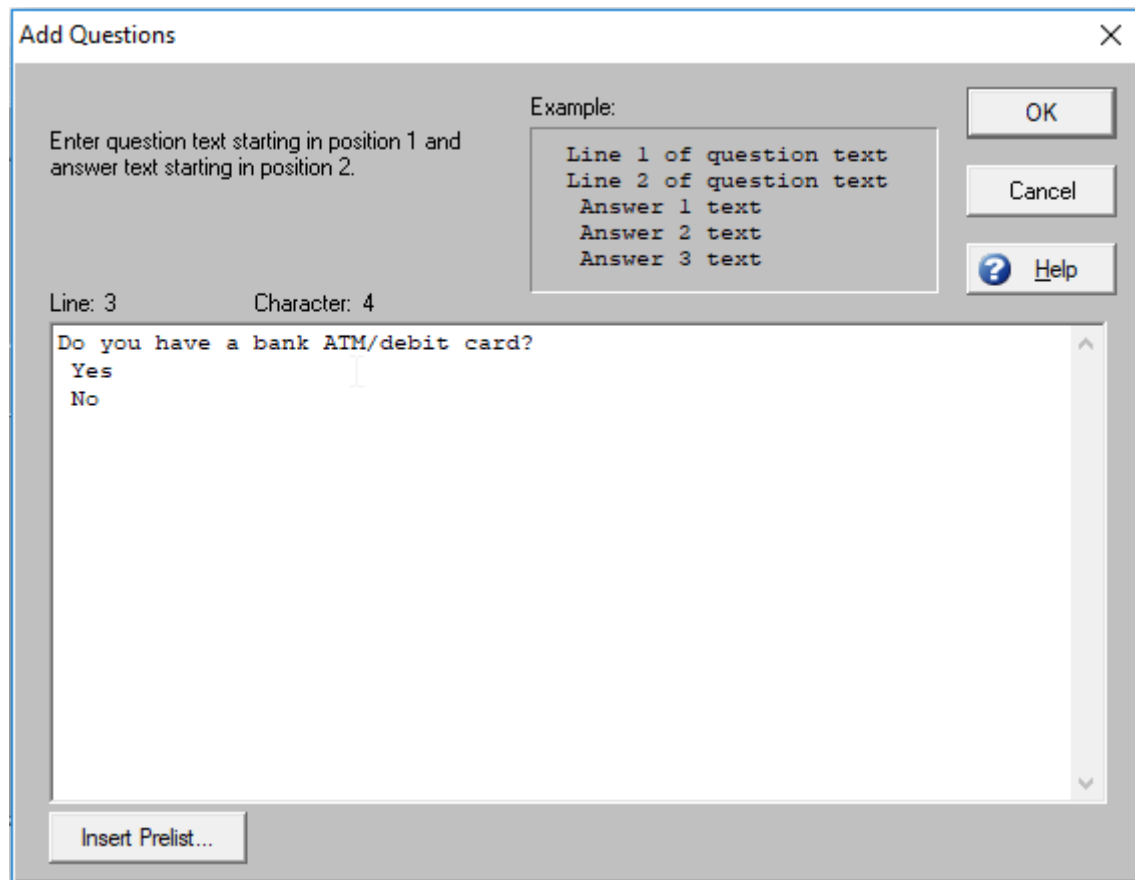
1. Entering question and answer choice text

- ☐ Start WinQuery and logon as **SUPERVISOR** if you haven't already done so.
- ☐ If you've already started WinQuery, choose **File|New Study** to verify you're creating a new study.
- ☐ Choose **Management|Build Questionnaire**.



The **Build Questionnaire** dialog box (shown above) should now be displayed.

- ☐ Verify that the **Questions** tab is selected. If not, select the tab now.
- ☐ Select **Add** to add a new question.



In the **Add Questions** dialog box, you will want to enter all question text beginning in column 1. Answer text should start in column 2. Using this format allows WinQuery to quickly scan your questions and answers as it applies initial logic to your questionnaire. As you enter questions and answers, a status line reports your cursor position.

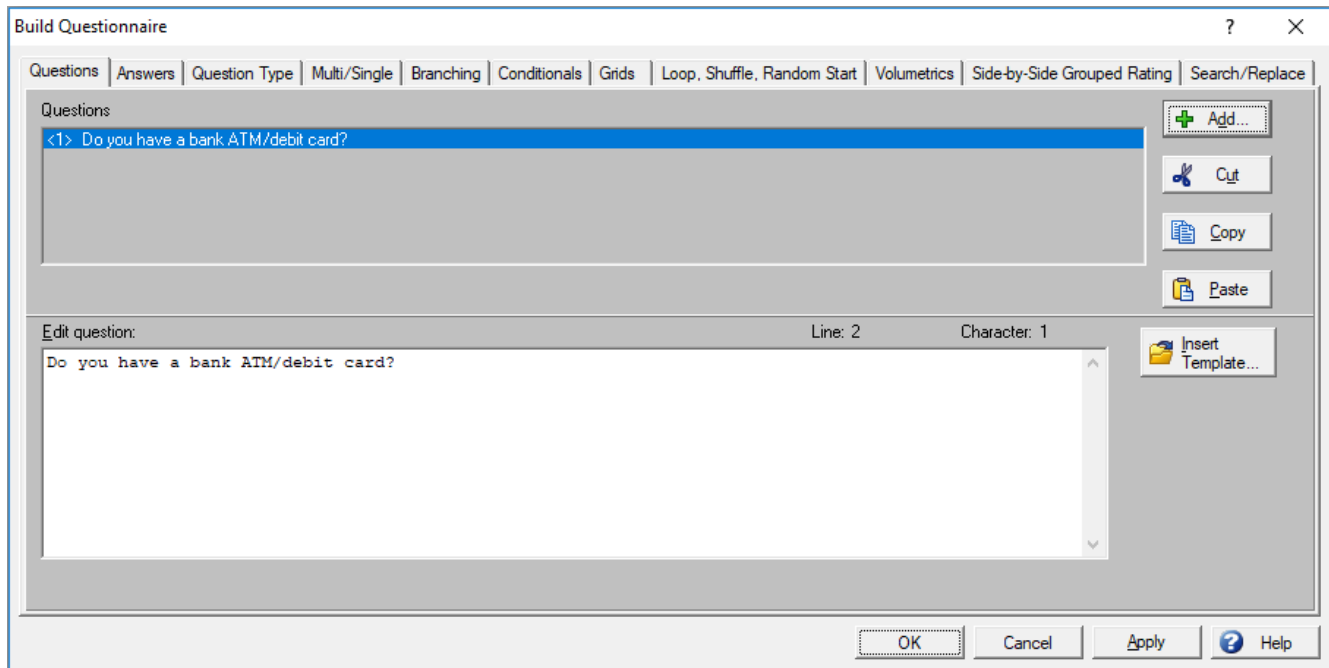
- ☐ Starting in line 1, column 1, enter the first question:

```
Do you have a bank ATM/debit card?
```

- ☐ Moving the cursor to line 2, column 2, enter the first answer choice: Yes
- ☐ On line 3, column 2, enter the second answer choice: No

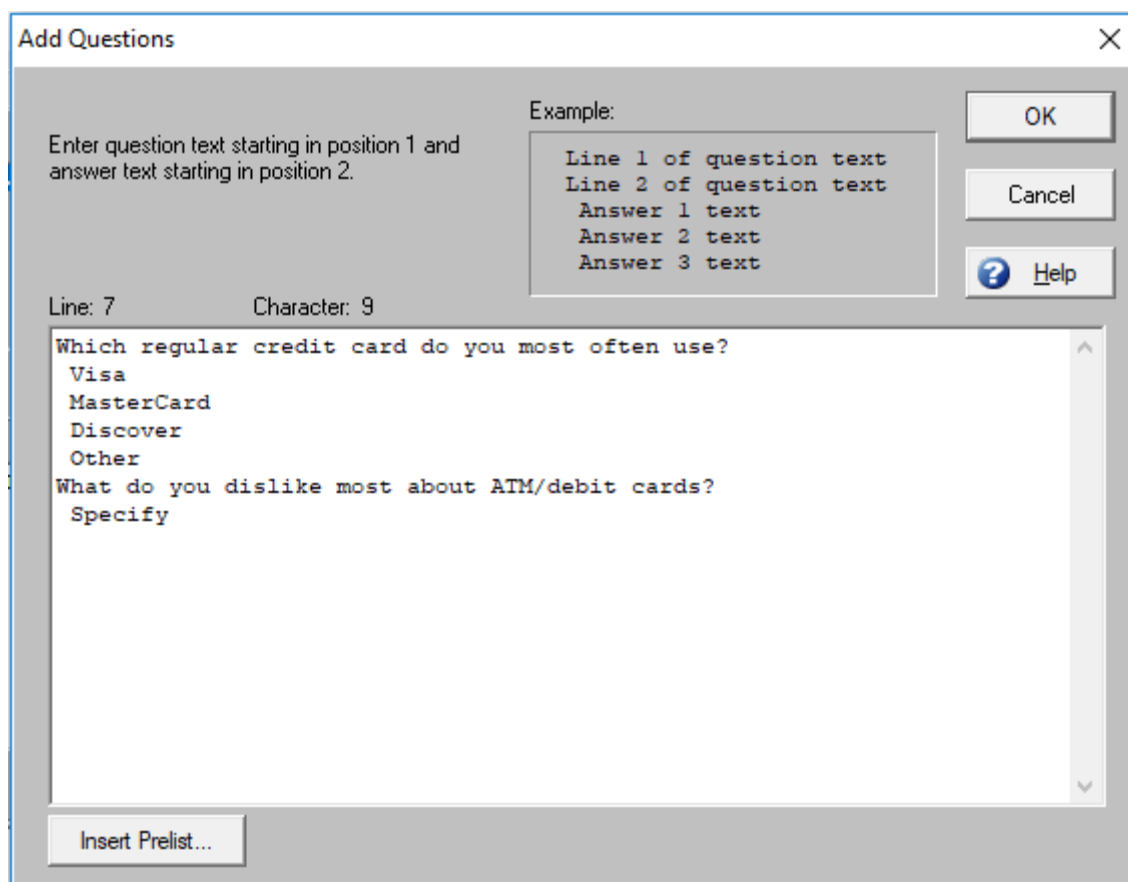
The **Add Questions** dialog box should now match the illustration above.

- ☐ Select **OK**.



Your first question has been numbered <1> in the **Questions** list. Now that you've seen how easy it is to create a question in WinQuery, you're ready to add additional questions:

- ☐ Select **Add**.
- ☐ Again starting on line 1, column 1, enter: Which regular credit card do you most often use?
- ☐ On line 2, column 2, enter the first answer choice: Visa
- ☐ On line 3, column 2, enter the second answer: MasterCard
- ☐ On line 4, column 2, enter the third: Discover
- ☐ On line 5, column 2, enter the last answer choice: Other

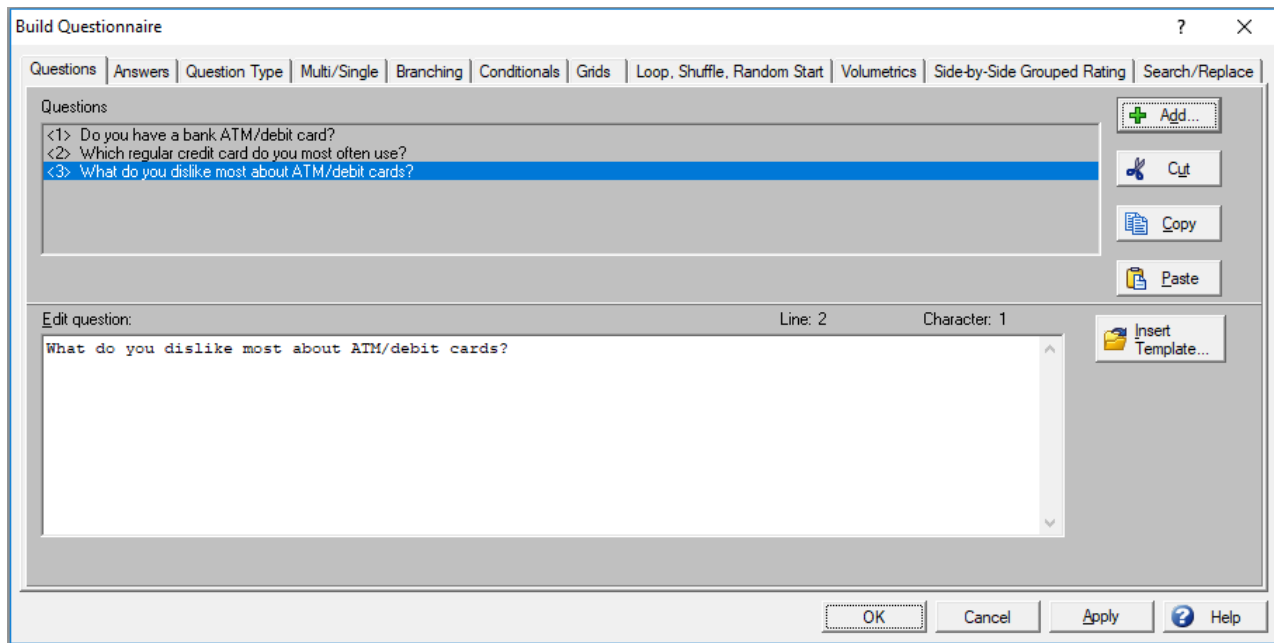


It's not necessary to select **Add** after each question. Go ahead and enter the next question, remembering to start in column 1.

- ☐ On line 6, column 1, enter: What do you dislike most about ATM/debit cards?
- ☐ Enter the answer choice on line 7, column 2: Specify.

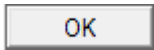
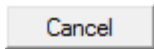
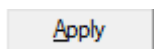
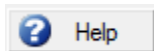
The **Add Questions** dialog box should now match the illustration above.

- ☐ Select **OK**.



The **Build Questionnaire** dialog box (above) now shows the additional questions you just entered.

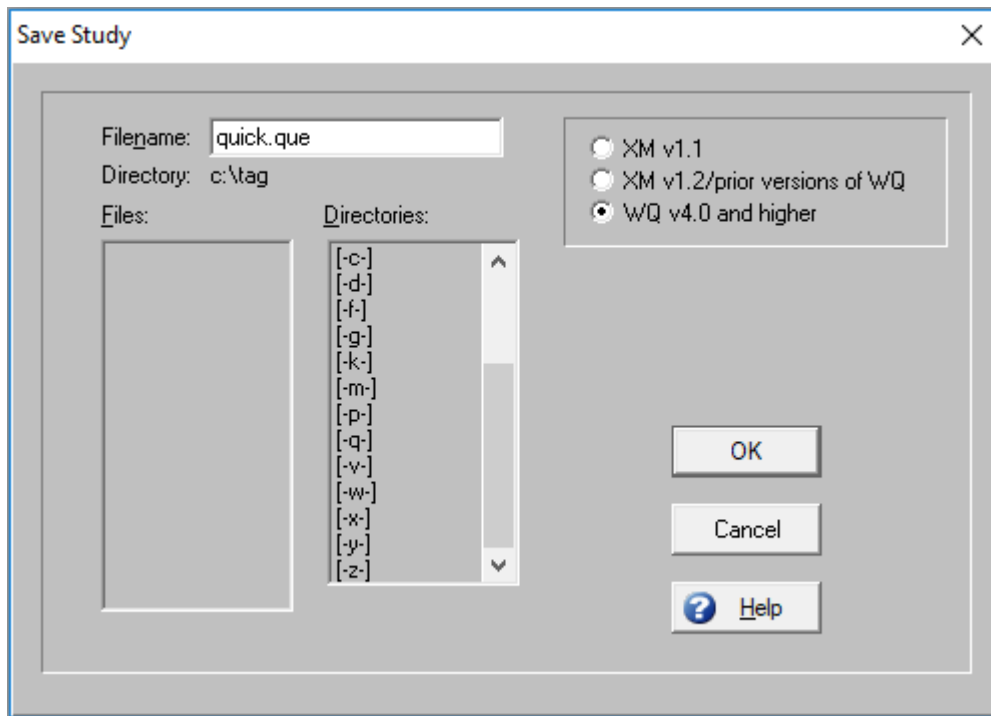
Let's examine the buttons on the bottom of the **Build Questionnaire** dialog box:

- | | |
|---|---|
|  | OK saves your work and closes the Management Build Questionnaire dialog box. |
|  | Cancel closes the Management Build Questionnaire dialog box without saving any changes. |
|  | Select Apply anytime you want to save changes to memory while leaving the Management Build Questionnaire dialog box open for continued access. <i>Tip: If you're making just a single change within any dialog box, it's not necessary to first select Apply before selecting OK.</i> |
|  | Useful online Help is one click away from within any WinQuery dialog box. |

Apply and **OK** only save changes to memory. To save your study file to disk, you should periodically choose **File|Save|Save Study**. Note that the keyboard equivalent is **F2**. As you would with any application, it's a good idea to frequently choose **File|Save|Save Study** in the event of an unexpected power loss or other computer problem.

Now you're ready to save your study.

- ☐ Choose **OK** to close the **Management|Build Questionnaire** dialog box.



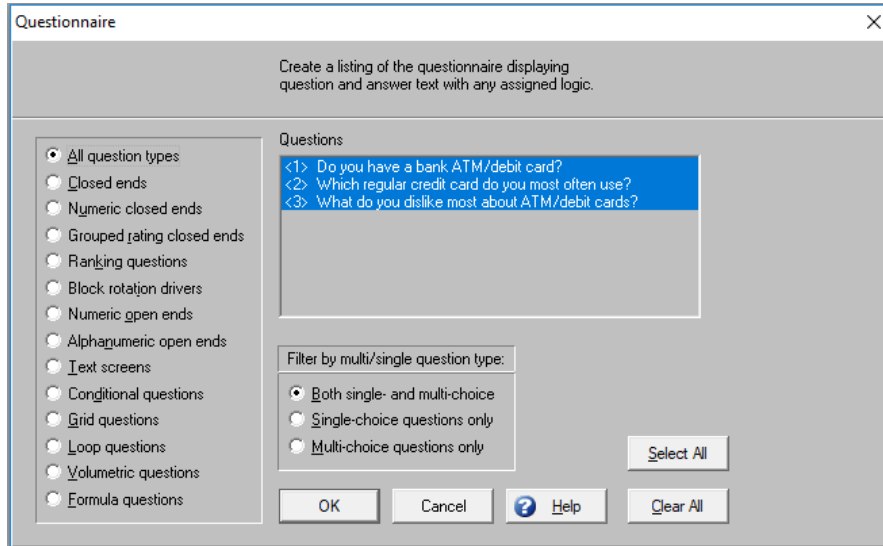
2. Saving a study

You've decided you want to save your study using the name, quick.

- ☐ Choose **File|Save|Save Study**.
- ☐ Enter `quick` in the **Filename** field.
- ☐ Choose the version of WinQuery for saving your study. **WQ v4.0 and higher** is the default version.
- ☐ Select **OK** or press **ENTER**.

The title bar of the **Study:** dialog box now displays the complete filepath of your study, for example, `c:\tag\quick.que`.

3. Viewing a questionnaire report



- ☐ Choose **Reports|Questionnaire**.

Your questions are listed and selected (highlighted).

- ☐ Select **OK** to produce a report.



The listing shows the assumptions made by WinQuery when it applied initial logic:

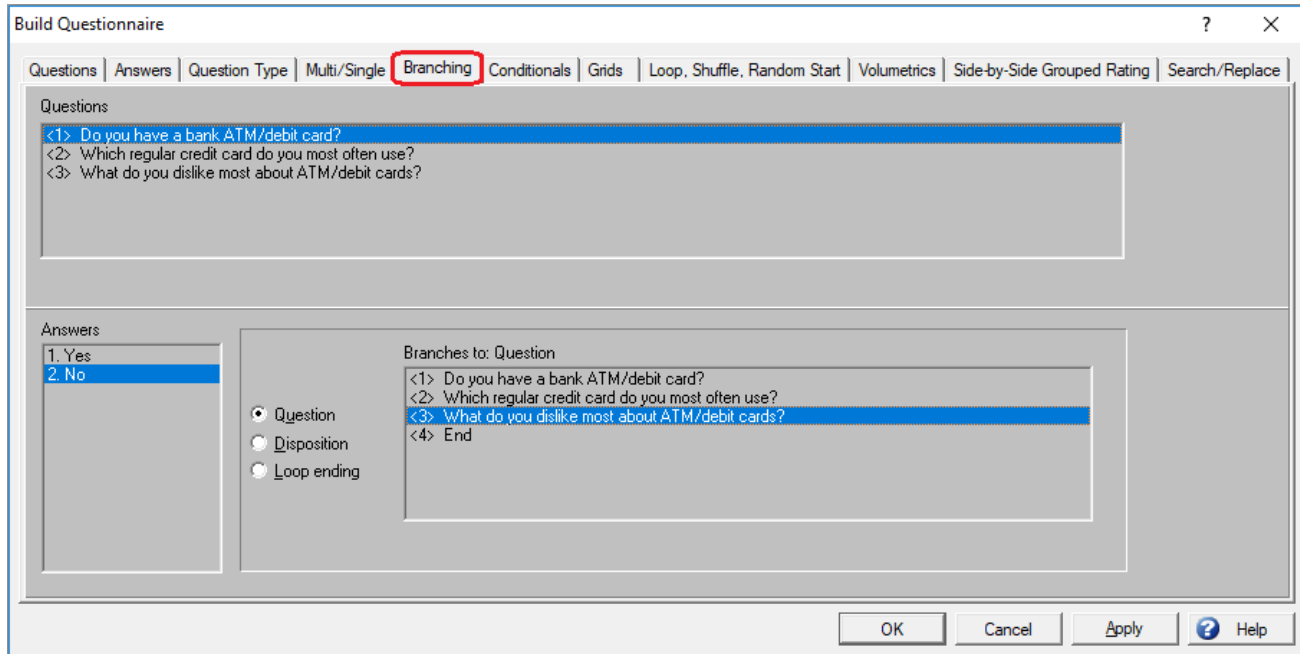
- ✓ Sequential answer codes are assigned.
- ✓ When a question has only one answer choice, such as Question 3, it's assumed to be a multi-punch open ended question and accepts a multiple-line response.
- ✓ Questions with more than one answer choice are assumed to be single-punch, closed ended questions.
- ✓ All answer choices branch to the next question.

These assumptions are based on the probability that most closed ended questions are single-punch and that most open ended questions are multi-punch. This means you need only apply logic for exceptions to these assumptions. After initial logic is applied, of course, it's easy to use **Management|Build Questionnaire** options to make changes. You'll do that next.

4. Modifying branching

- ☐ Choose **Management|Build Questionnaire**.
- ☐ Select the **Answers** tab.

With this option you can view any question and its corresponding answer choices at any time. WinQuery includes advanced features that let you shuffle answers, reverse their order and much more.



For now, you want to change Question <1> so that a No answer skips to Question <3>, rather than Question <2> as assigned by initial logic:

- ☐ Choose the **Branching** tab.
- ☐ If Question <1> is not already highlighted in the **Questions** list, click it so that it is selected.

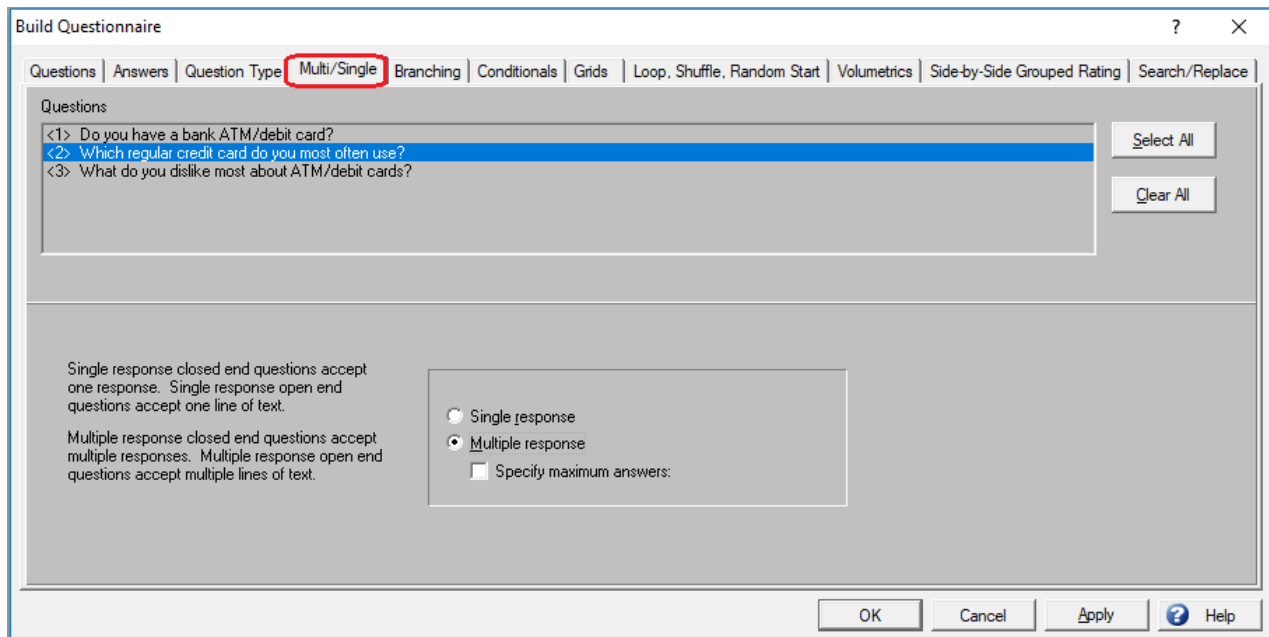
A question can branch to another question, a disposition or to a loop terminate. Also notice that <4> End was added to the bottom of the **Branches to: Question** list. WinQuery automatically provides this so that you can establish branches to the end of the questionnaire, even before you've finished writing all your questions.

- ☐ Select the No answer choice from the **Answers** list.
- ☐ Select Question <3> in the **Branches to: Question** list.
- ☐ Select **Apply** to save your change to memory.

Congratulations! Now the questionnaire will branch to Question <3> whenever the answer to Question <1> is No during an interview.

Next, you'll learn how to change a single-punch question to a multi-punch question.

5. Modifying response type (Multi/Single)

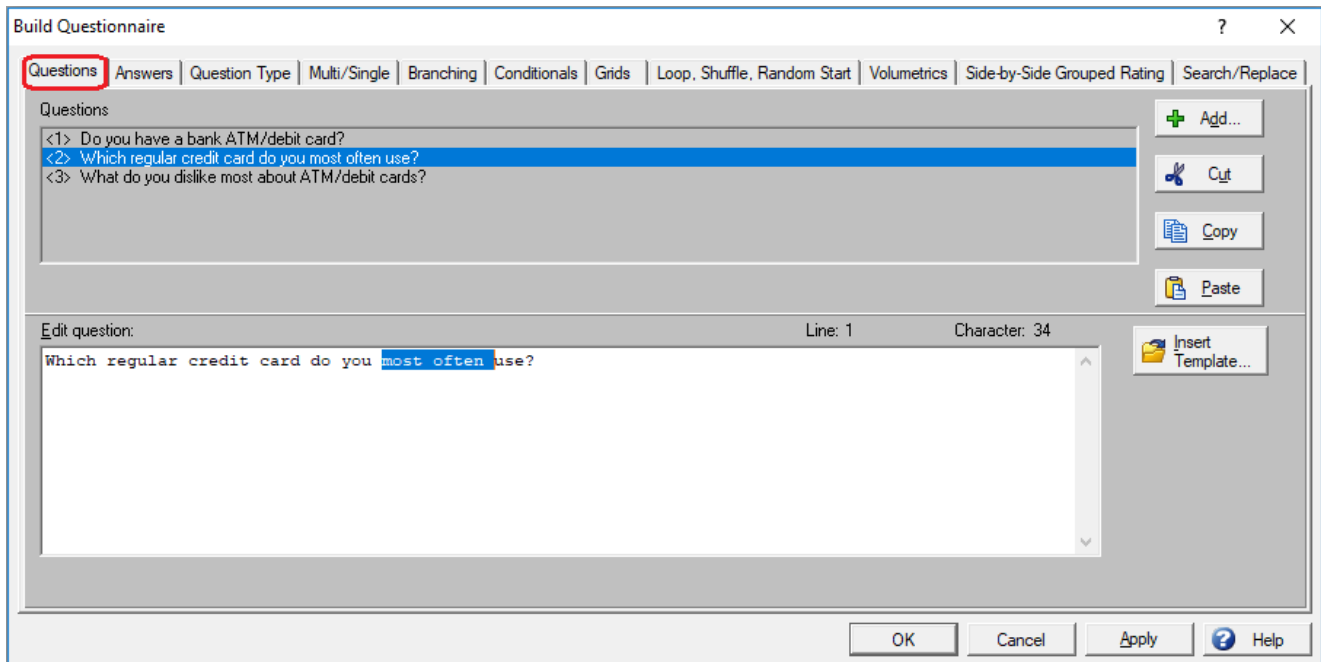


- ☐ Select the **Multi/Single** tab.
- ☐ Select Question <2>.
- ☐ Select **Multiple response**.
- ☐ Select **Apply**.

That's all there is to it!

6. Making text changes

Now you'll change the question text to make it a multiple response question and add another answer choice for Question <2>.



- ☐ Select the **Questions** tab.
- ☐ Select Question <2>. Its text appears in the **Edit question:** list box.

Your next task is to change the question text to read, Which regular credit cards do you use? Note the cursor changes to an I-beam shape as you move it within the **Edit question** box. Just like a word processor, you can use the I-beam cursor to wipe (select) text.

- ☐ Using the I-beam cursor, click once after the word you and wipe to the right. This action selects the two words, most often, and should include the following space.
- ☐ Press **Delete** on the keyboard to remove the selected words, most often.

Now you'll want to pluralize the word card. There are several methods to do this, but here is an easy way that doesn't require precision I-beam placement:

- ☐ Double-click the word card, then enter `cards` (include the trailing space).
- ☐ Select **Apply**.

The screenshot shows a dialog box titled "Add Answer". It has a close button (X) in the top right corner. Inside the dialog, there is a list box labeled "Answers" containing the following items: "Visa", "MasterCard", "Discover", and "Other". The "Other" item is currently selected and highlighted in blue. To the right of the list box are five buttons: "Close/Save", "Cancel", "Help" (with a question mark icon), "Add" (with a green plus icon), and "Delete" (with a red X icon). Below the list box, there is a text input field labeled "Enter answer" which contains the text "None". To the right of this field, it says "Line: 1" and "Character: 5". The input field has a scroll bar on its right side.

Next, you'll add a new answer choice for Question 2.

- ☐ Select the **Answers** tab.
- ☐ Select Question <2>.
- ☐ Select **Add**. New answer text gets added directly below the answer currently selected in the **Answers** list. Later in the tutorial you'll work with **Copy**, **Cut** and **Paste** options on the **Answers** tab to rearrange the answer choice order.
- ☐ Select Other in the **Answers** list.
- ☐ Enter None in the **Enter answer** field.
- ☐ Select **Add**.
- ☐ Select **Close/Save**.

The **Answers** tab dialog box is displayed once again.

- ☐ Select **OK**.

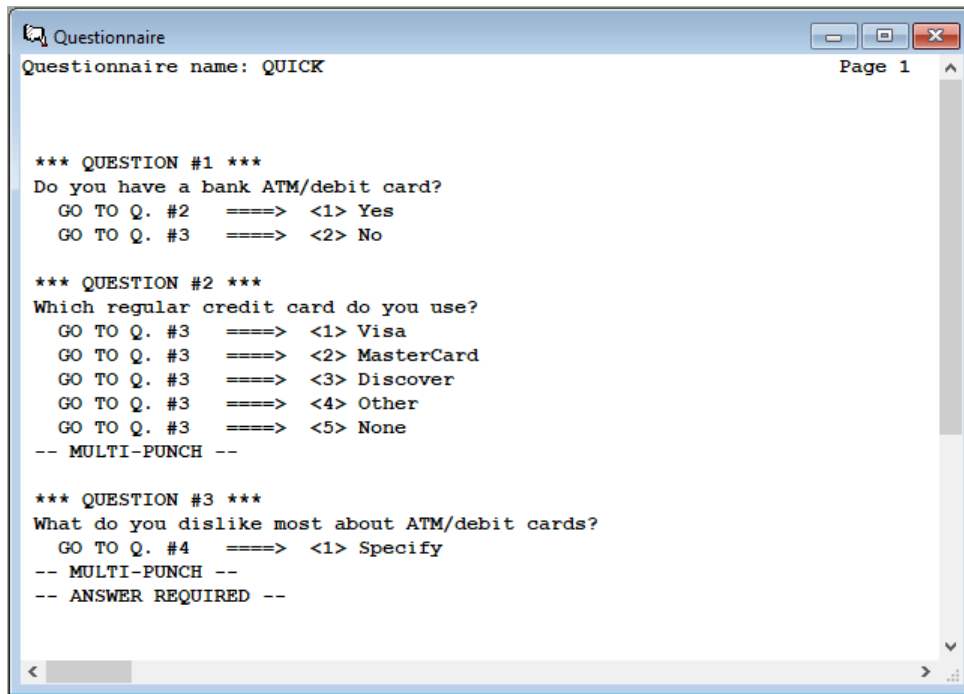
Note: Keep in mind that **Apply** and **OK** only save changes to memory. To completely save your study you should periodically select **File|Save|Save Study**. Alternatively, you can select **F2** to save your study. Now would be a good time to save your study by selecting **File|Save|Save Study** or by simply selecting **F2**.

7. Viewing changes

- ☐ Choose **Reports|Questionnaire**.

All the questions you created are listed and selected.

- ☐ Select **OK** to produce a report.



The screenshot shows a window titled "Questionnaire" with a status bar indicating "Page 1". The window displays the following text:

```
Questionnaire name: QUICK

*** QUESTION #1 ***
Do you have a bank ATM/debit card?
GO TO Q. #2  =====>  <1> Yes
GO TO Q. #3  =====>  <2> No

*** QUESTION #2 ***
Which regular credit card do you use?
GO TO Q. #3  =====>  <1> Visa
GO TO Q. #3  =====>  <2> MasterCard
GO TO Q. #3  =====>  <3> Discover
GO TO Q. #3  =====>  <4> Other
GO TO Q. #3  =====>  <5> None
-- MULTI-PUNCH --

*** QUESTION #3 ***
What do you dislike most about ATM/debit cards?
GO TO Q. #4  =====>  <1> Specify
-- MULTI-PUNCH --
-- ANSWER REQUIRED --
```

In comparing this new report to the one you produced in step 3, **Reports|Questionnaire** lets you easily observe the changes you've made to your questionnaire. Let's review your changes:

- ✓ In Question <1>, the No answer choice now branches to Question <3>.
- ✓ In Question <2>, you changed the question text, added another answer choice and made the question "multi-punch".

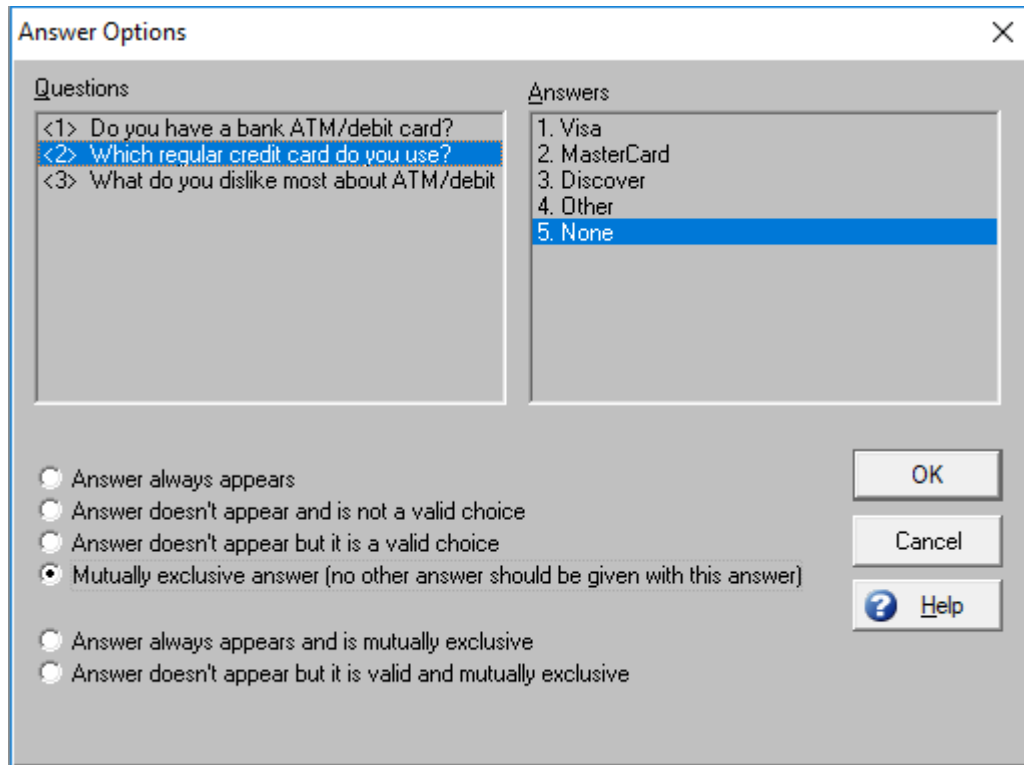
Section Two

The second section of this tutorial introduces you to some of WinQuery's more advanced features. These include:

8. Making an answer choice mutually exclusive
9. Adding more questions
10. Specifying a question type
11. Associating an "other specify"
12. Modify branching for multiple answer choices
13. Checking your questionnaire's spelling
14. Testing your questionnaire

8. Making an answer choice mutually exclusive

In step 5 and 6, you'll recall you changed Question <2>, Which regular credit cards do you use?, to accept multiple responses or the answer None. Since None means "none", it would not be appropriate for an interviewer to select another answer choice(s) in addition to this one. Therefore, now your task is to make None a mutually exclusive answer.

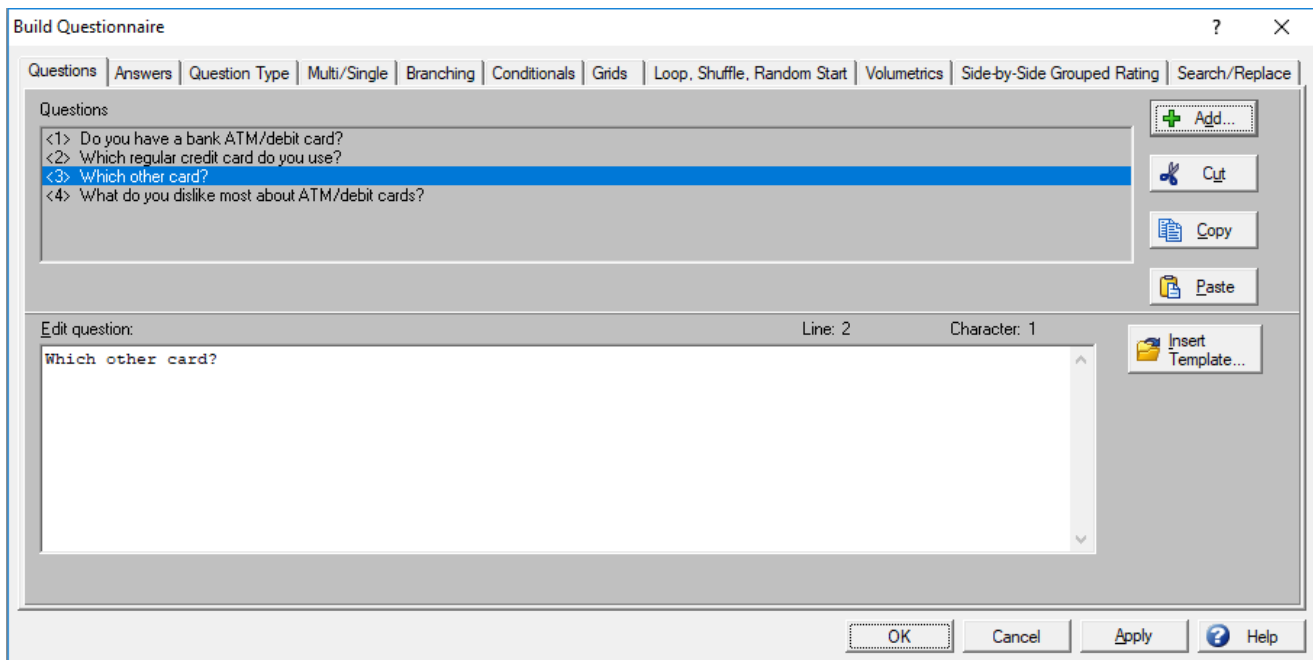


- ☐ Choose **Management|Build Questionnaire** and select the **Answers** tab.
- ☐ Choose **Options**.
- ☐ Select Question <2> from within the **Questions** list.
- ☐ Select None from the **Answers** list.
- ☐ Choose **Mutually exclusive answer (no other answer should be given with this answer)**.
- ☐ Select **OK** to close the **Answer Options** dialog box, then **OK** to close the **Build Questionnaire** dialog box.

Try using **Reports|Questionnaire** again. You'll now see a notation directly below the None answer choice which reads, ABOVE ANSWER IS MUTUALLY EXCLUSIVE.

9. Adding more questions

- ☐ Choose **Management|Build Questionnaire**.
- ☐ Verify the **Questions** tab is selected.
- ☐ Select **Add**.
- ☐ On line 1, column 1, enter `Which other card?`
- ☐ On line 2, column 2, (remember this will be an answer) enter `Specify`.
- ☐ Select **OK**.



When you add a new question, it's always inserted after the currently selected question.

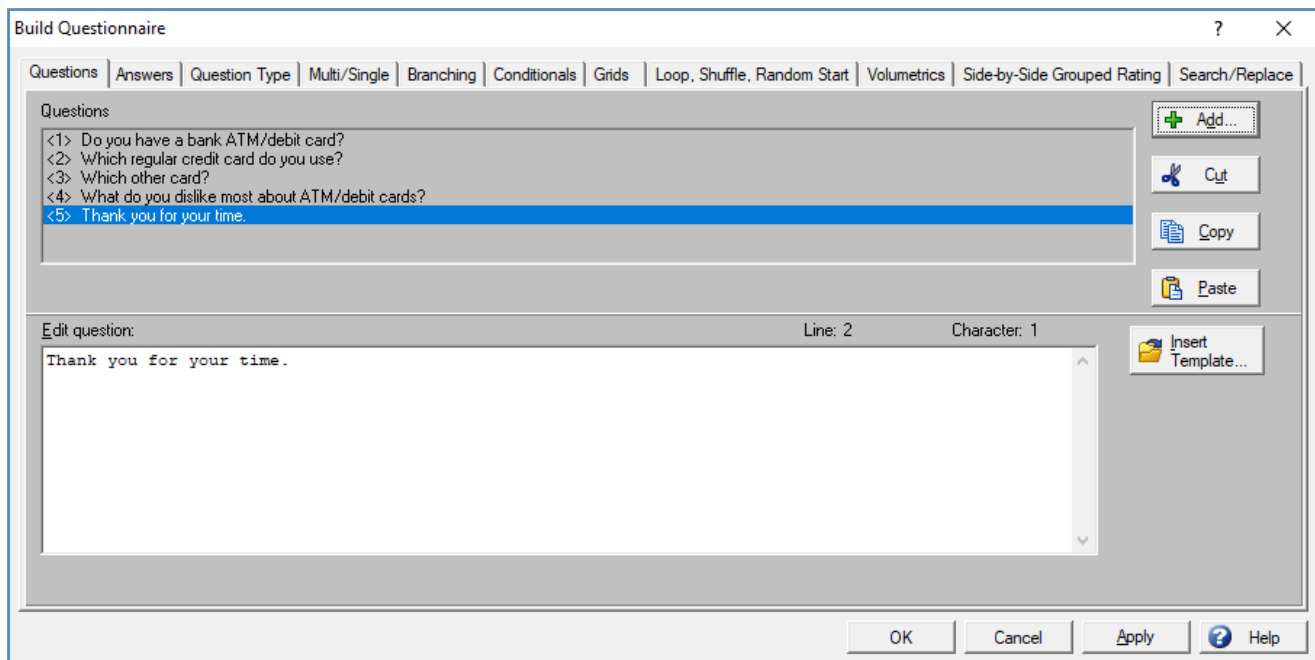
For this reason, the question you just added doesn't appear in the required order. Fortunately, it's easy to reposition a question:

- ☐ Select the new question, then select **Cut**.
- ☐ Now select Question <2> Which regular credit cards do you use?, then select **Paste**.

Your new question is reinserted as Question <3>. Note that questions are automatically renumbered anytime you use **Cut** or **Paste**.

Now let's add one final question. You know ahead of time it's going to be the last question, so it should appear at the bottom of the list. If you select the question that is currently in the last position, you won't need to use **Cut** and **Paste** later.

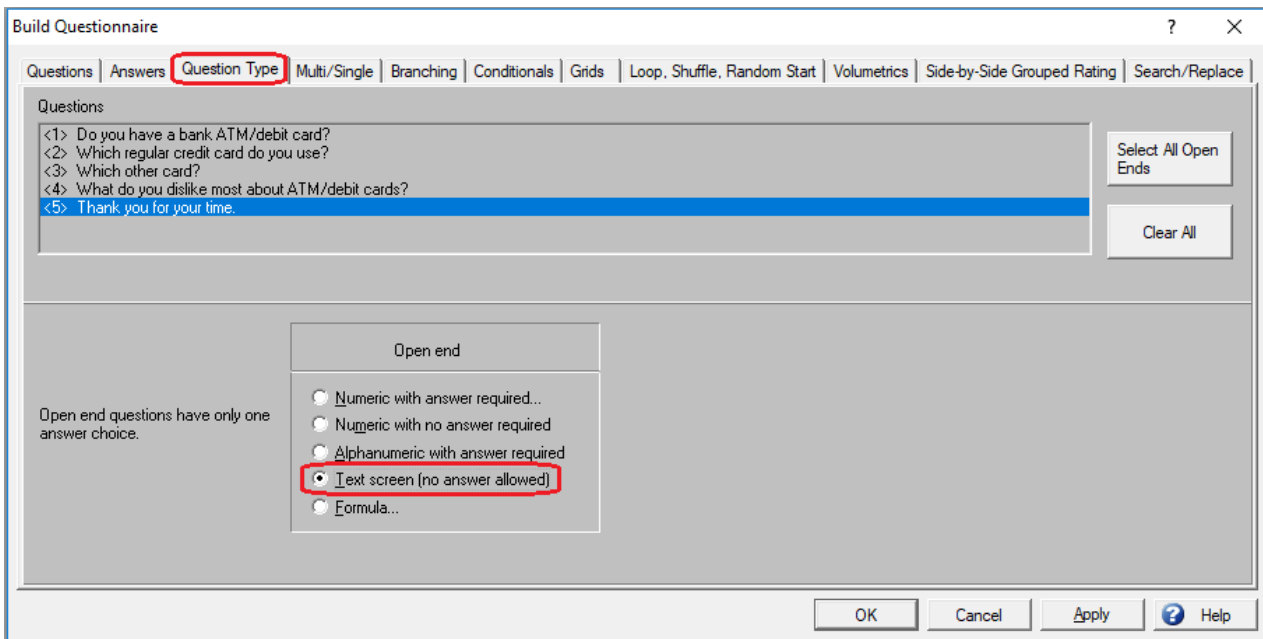
- ☐ Select the last question, What do you dislike most about ATM/debit cards?.
- ☐ Select **Add**.
- ☐ On line 1, column 1, enter Thank you for your time.
- ☐ On line 2, column 2, enter No answer.
- ☐ Select **OK**.



Because each of the new questions you added has only one answer choice, WinQuery assumes that both are multi-punch open end questions. That's alright for the Which other card? question, but not the question you just added, Thank you for your time. The next step, then, is to change this question to a Text screen (no answer allowed).

10. Specifying a question type

- ☐ Choose the **Question Type** tab.
- ☐ Select Question <5> Thank you for your time.
- ☐ From the **Open end** list of question types, choose **Text screen (no answer allowed)**.
- ☐ Select **Apply**.



If you like, you can select other questions to view their question type options at this time.

WinQuery has ten basic question types:

- Single-punch closed end
- Multi-punch closed end
- Numeric closed end (multi-punch)
- Grouped rating closed end
- Ranking closed end
- Block rotation driver closed end
- Numeric open end (single-punch)
- Alphanumeric open end (single- or multi-punch)
- Open end with no answer allowed (text screens)
- Dummy (single- or multi-punch)

Question Type lets you further define each closed end or open end question.

For closed end questions, you can choose:

- Regular closed end
- Numeric closed end
- Grouped rating closed end
- Ranking question
- Block rotation driver closed end

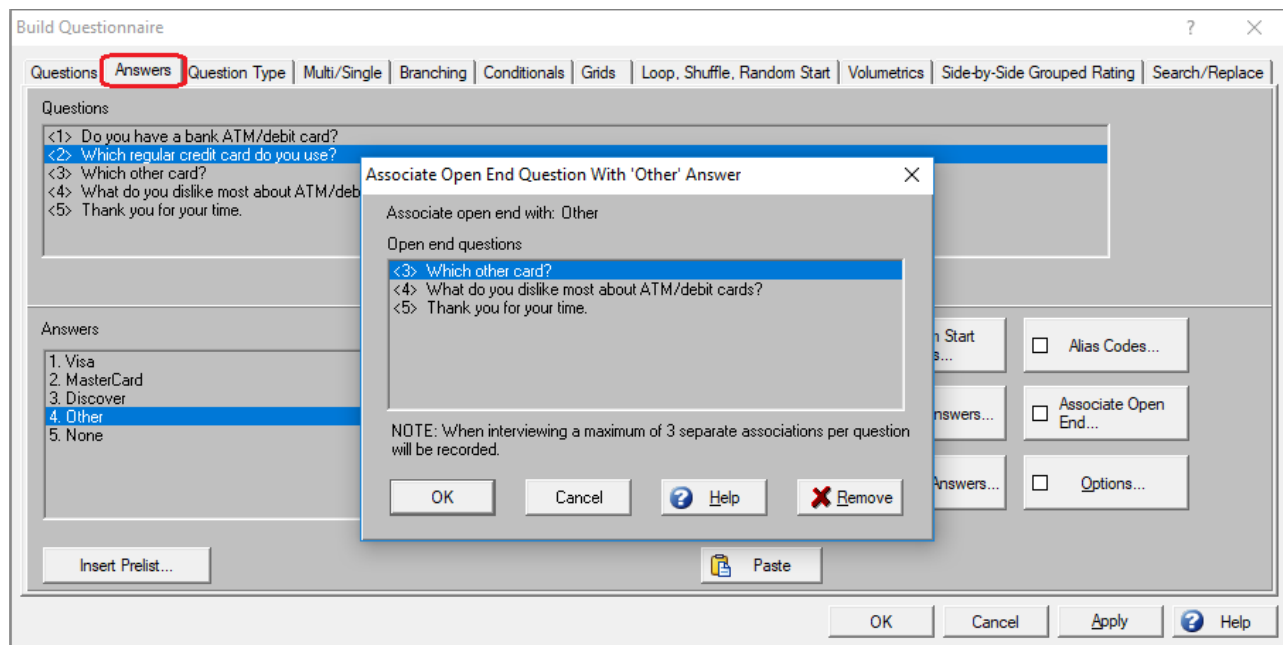
For open end questions, you can choose:

- Numeric with answer required
- Numeric with no answer required
- Alphanumeric with answer required
- Text screen (no answer allowed)
- Formula

So far, so good! There are a few more tasks, however. First, you'll want to associate the answer choice, Other, in Question <2> (Which regular credit cards do you use?) with Question <3> Which other card?. Branching also requires modification so that Question <3> is never encountered unless respondents specifically choose Other in response to Question <2>.

11. Associating an “other specify”

- ☐ Choose the **Answers** tab.
- ☐ Select Question <2> in the **Questions** list.
- ☐ Select Other in the **Answers** list.
- ☐ Select **Associate Open End**.
- ☐ Select Question <3> Which other card?.
- ☐ Select **OK**.

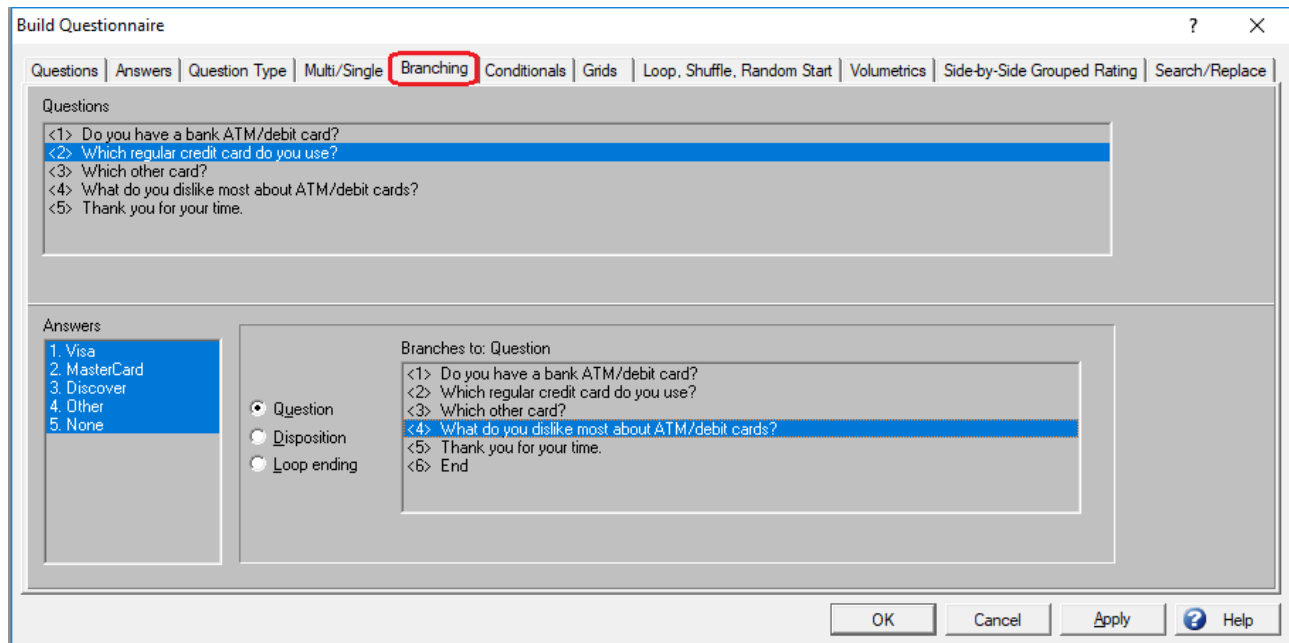


During interviewing, if the respondent chooses Other in Question <2>, the questionnaire will now display a dialog box for the interviewer to type an answer to Question <3> Which other card?.

The **Associate Open End** option is most often used in this way, but you can also associate any response in a closed end question with an open end question (or even a text screen).

Next you'll modify branching to skip past an associated open end question.

12. Modify branching for multiple answer choices



- ☐ Choose the **Branching** tab.
- ☐ Select Question <2> in the **Questions** list.
- ☐ Select all the answers in the **Answers** list. To do so, select the first answer and drag your mouse over all the answers or keep the **Ctrl** key continuously depressed while you select each answer.
- ☐ Select Question <4> What do you dislike most about bank ATM/debit cards? in the **Branches to: Question** list.

Don't worry about modifying branching for the Other answer choice. Since you specified it as an associated open end, WinQuery will automatically display the associated open end question whenever Other is selected.

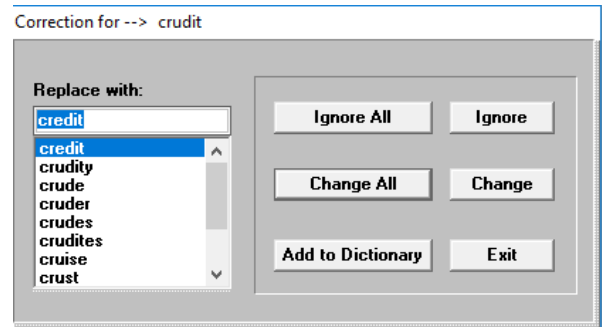
- ☐ Select OK.

Note: Keep in mind that **Apply** and **OK** only save changes to memory. To completely save your study, you should periodically select **File|Save|Save Study**. Alternatively, you can select **F2** to save your study. Now would be a good time to save your study by selecting **File|Save|Save Study** or by simply selecting **F2**.

13. Checking your questionnaire's spelling

It's easy to check spelling within your questionnaire using the **Utilities|Spell Check Questionnaire** option. When you do, all questions are initially selected. If you like, you can select **Clear All**, then explicitly select one or more questions. Choose **Select All** if you would like to reselect all questions.

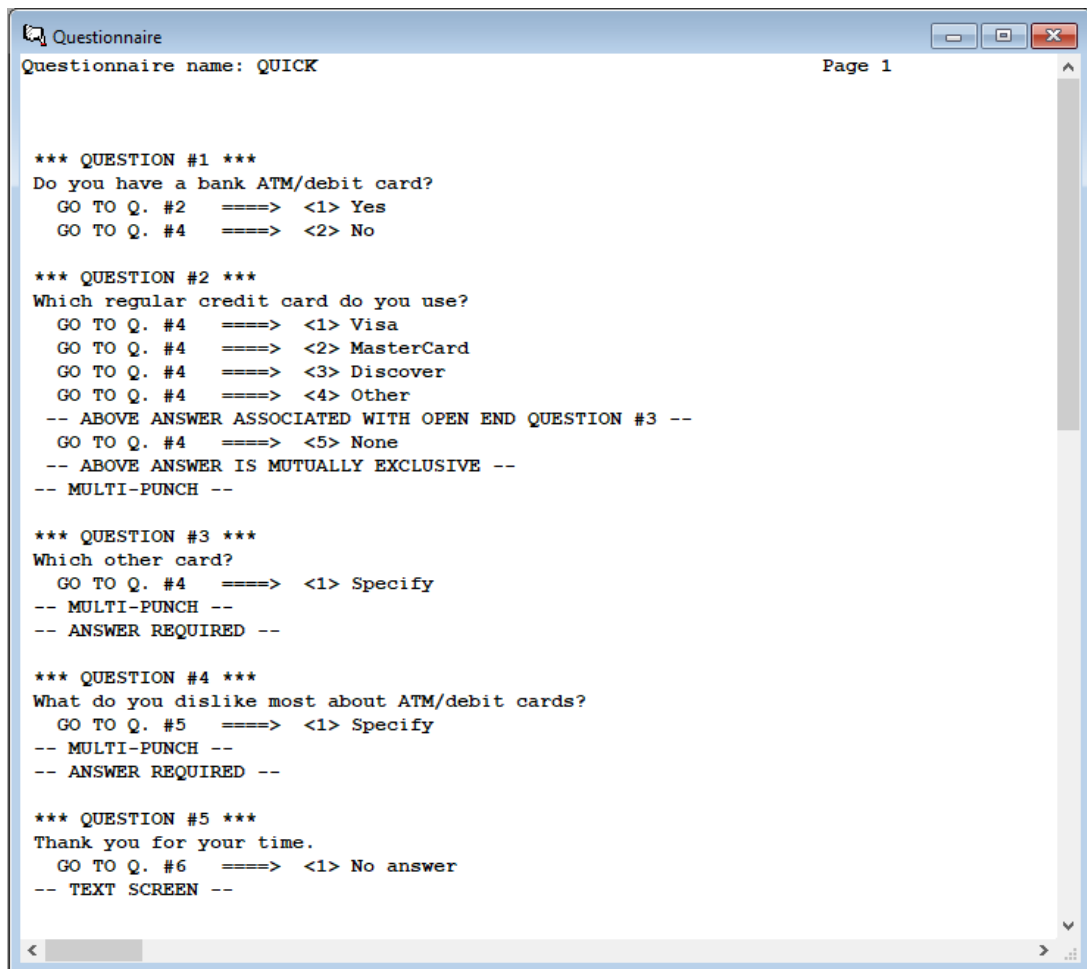
Select **Start** when you're ready to check spelling. The **Correction for -->** dialog box displays a word that contains a possible error. You can choose to ignore one or all instances of the word, change one or all instances of the word, or add the word to the dictionary so the spell checker won't display it again. You can choose to exit at any time with any spelling corrections you've made being maintained.



- ☐ Choose **Utilities|Spell Check Questionnaire**.
- ☐ Select **Start**.
- ☐ Make spelling corrections as needed.
- ☐ Select **Exit**.
- ☐ Choose **File|Save|Save Study** (or press **F2**).

Congratulations! You've successfully created a questionnaire and used many WinQuery features. Now let's take a look at the completed questionnaire using **Reports|Questionnaire**.

- ☐ Choose **Reports|Questionnaire**.
- ☐ Select **OK** to produce a report.



The report shows all the changes you've made, including:

- ✓ A No answer in Question <1> branches to Question <4>. WinQuery automatically changed the branching when you inserted your new Question <3>.
- ✓ All Question <2> answers branch to Question <4>, as you specified.
- ✓ The Other answer choice in Question <2> includes a notation that it's associated with open end Question <3>.
- ✓ The None answer choice in Question <2> includes a notation that it's mutually exclusive.

Next, you'll test the questionnaire using **Interview|Conduct Interview**.

14. Testing your questionnaire

Now you'll view and test the questionnaire. When you create a questionnaire for an actual study, testing it is one of the most important steps.



Test your questionnaire thoroughly before you begin interviewing, making sure to examine resulting test data. Taking time to properly test your questionnaire can go a long way toward eliminating expensive errors that otherwise would not be discovered until interviewing is underway or complete.

Make sure you've set up your WinQuery system using **Options|System Preferences** as described in the *Getting Started* portion of this tutorial.

Before using **Interview|Conduct Interview** to view the questionnaire, it's a good idea to verify a few settings in **Options|Study Preferences**.

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

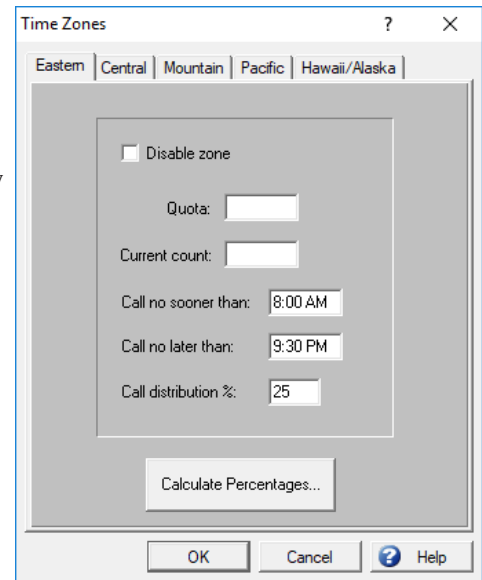
- Time zone where interviewing is being conducted:
 - ☐ Eastern
 - ☐ Central
 - ☒ Mountain (highlighted with a red box)
 - ☐ Pacific
 - ☐ Hawaii/Alaska
- Ending position for word wrap (5-72): 72
- Date of end of study: (MM/DD/YY)
- Time of end of study: 12:00 AM
- Local area code: 480
- Empty old temporary files: [Empty button]
- Allow gaps in single record data file: ☐
- Single record data output: ☒
- Hide page headers on WinQuery reports: ☐

Buttons at the bottom: StrataDial..., StrataDial.VC2..., PRO-T-S..., VoIP..., OK, Cancel, Help.

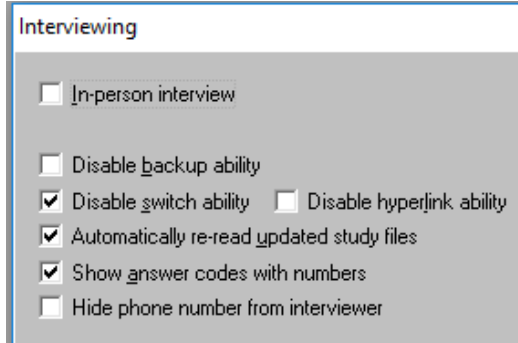
- ☐ Choose **Options|Study Preferences**.
- ☐ Choose **General**.
- ☐ Verify the **Time zone where interviewing is being conducted** is your time zone. Just select the appropriate zone.
- ☐ Select **OK**.

- ☐ Choose **Time Zones**.
- ☐ Choose the tab for your time zone and make any changes necessary to **Call no sooner than** or **Call no later than** to accommodate the current time.
- ☐ Select **OK**.

Note: For a live study, each time zone represented in your sample file would need to be set based to the respondent's time zone.



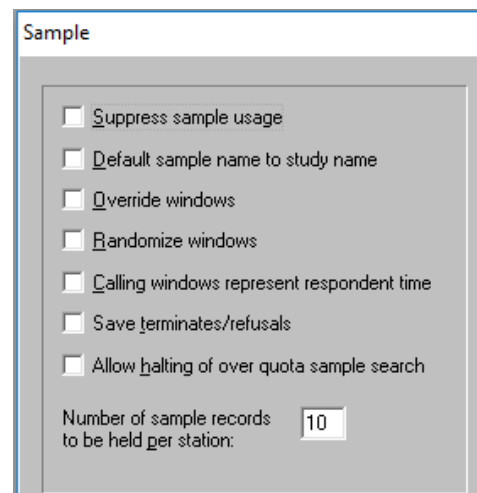
The 'Time Zones' dialog box has tabs for Eastern, Central, Mountain, Pacific, and Hawaii/Alaska. The 'Central' tab is selected. Inside the dialog, there is a 'Disable zone' checkbox (unchecked), a 'Quota' text box, a 'Current count' text box, 'Call no sooner than' and 'Call no later than' time pickers (set to 8:00 AM and 9:30 PM respectively), and a 'Call distribution %' text box (set to 25). A 'Calculate Percentages...' button is at the bottom. At the very bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons.



The 'Interviewing' dialog box contains several checkboxes: 'In-person interview' (unchecked), 'Disable backup ability' (unchecked), 'Disable switch ability' (checked), 'Disable hyperlink ability' (unchecked), 'Automatically re-read updated study files' (checked), 'Show answer codes with numbers' (checked), and 'Hide phone number from interviewer' (unchecked).

- ☐ Choose **Interviewing**.
- ☐ Verify that **Disable backup ability** isn't selected. If it is disengage it by removing the check mark.
- ☐ Select **OK**.

- ☐ Choose **Sample**.
- ☐ Select **Suppress sample usage**, since you don't have sample set up for this study.
- ☐ Select **OK**.
- ☐ Select **OK** to close the **Study Preferences** dialog box.
- ☐ Save your study to disk by selecting **File| Save|Save study**.



The 'Sample' dialog box contains checkboxes for: 'Suppress sample usage' (unchecked), 'Default sample name to study name' (unchecked), 'Override windows' (unchecked), 'Randomize windows' (unchecked), 'Calling windows represent respondent time' (unchecked), 'Save terminates/refusals' (unchecked), and 'Allow halting of over quota sample search' (unchecked). At the bottom, there is a 'Number of sample records to be held per station' text box with the value '10'.

Now, you'll take a look at your questionnaire.

- ☐ Choose **Interview|Conduct interview**.

The dialog box prompts you for an interviewer ID.

- ☐ Enter **USER**, then select **OK** (or press **ENTER**).

Now you're prompted for a questionnaire file name.

- ☐ Select **QUICK**, enter **000** in the **Batch ID** field, then select **OK**. (If you used another name for your questionnaire, select it instead.)

The dialog box prompts you for a phone number.

- ☐ Enter any seven digits for the phone number, then select **OK** (or press **ENTER**).
- ☐ When prompted to verify the phone number, select **YES** (or press **ENTER**).
- ☐ Select **DIAL** when the dialog box prompts you to dial the number (or press **ENTER**).

The first question is displayed:

Conduct Interview: QUICK

File Actions View Help

Question Study: QUICK Batch ID: 000 Closed end question

Do you have a bank ATM/debit card?

Answer:

☐ <1> Yes
☐ <2> No

Respondent #1 Question #1 Elapsed time: 1:45 12:15:13 PM

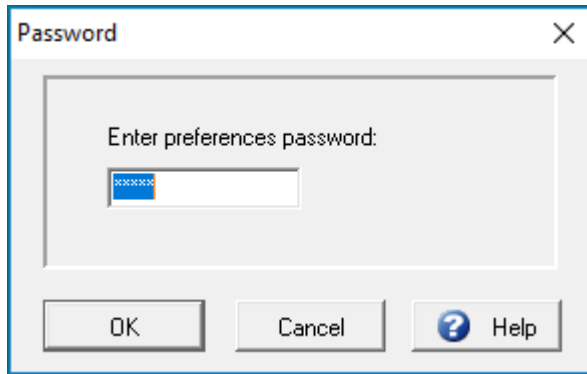
The status bar at the bottom of the dialog box displays the respondent number, question number, elapsed time and current time. You'll recall that when you assigned questionnaire logic, you programmed the questionnaire to branch to Question <4> if No is chosen.

- ☐ Double-click the answer, No. (Alternatively, you can enter the first character of the desired response, then press **ENTER**.)

The questionnaire automatically advances to Question <4>, as verified by the status bar.

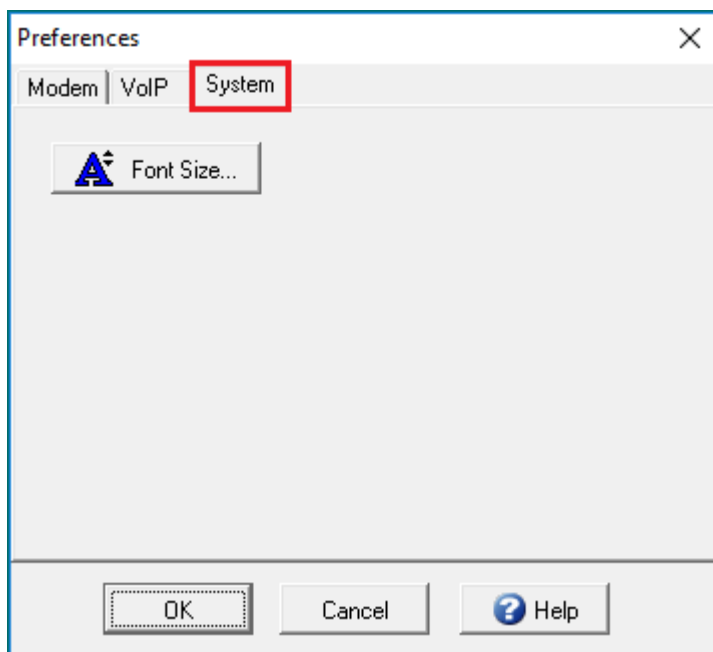
With the interview still running, let's back up to Question <1>:

- ☐ Select **Back**. Depending on your monitor and display resolution, you may want to change the font size to fit your needs. You can change the question and answer text size independently of one another.
- ☐ Select **View|Preferences**.

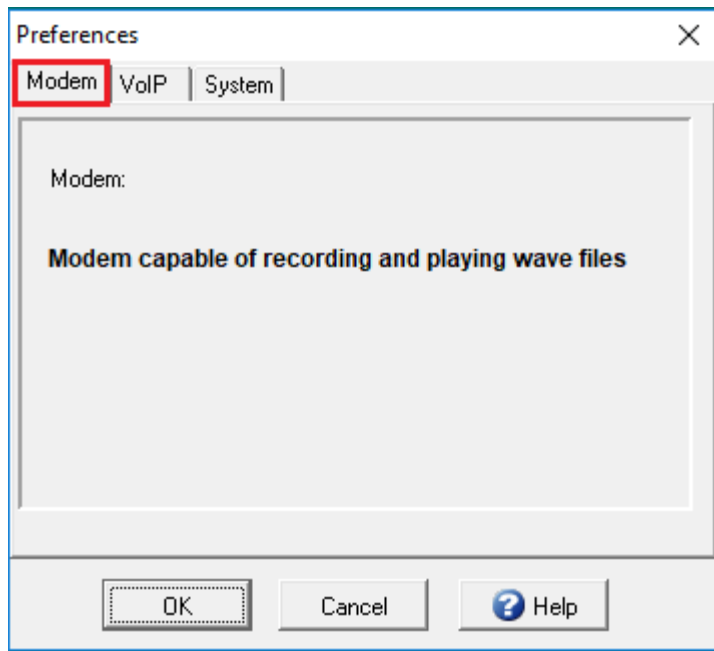


- ☐ Enter "tag" in the **Enter preference password** dialog box and select **OK**.

***Note:** The **Preferences** password can be changed in Winquery using **Options|System Preferences|Interviewing**.*



The **System** tab on the **Preferences** dialog box lets you set question and answer text size independently by interviewer station.



If the installed modem is TAPI-compliant, the **Modem** tab of the **Preferences** dialog box reports Modem capable of recording and playing WAV files. Its **Setup** button provides a direct interface to Windows' modem configuration settings. If the modem is not TAPI-compliant, it does not have multimedia capability and will use WinQuery's **Options|System Preferences|Telephone** settings for dialing.

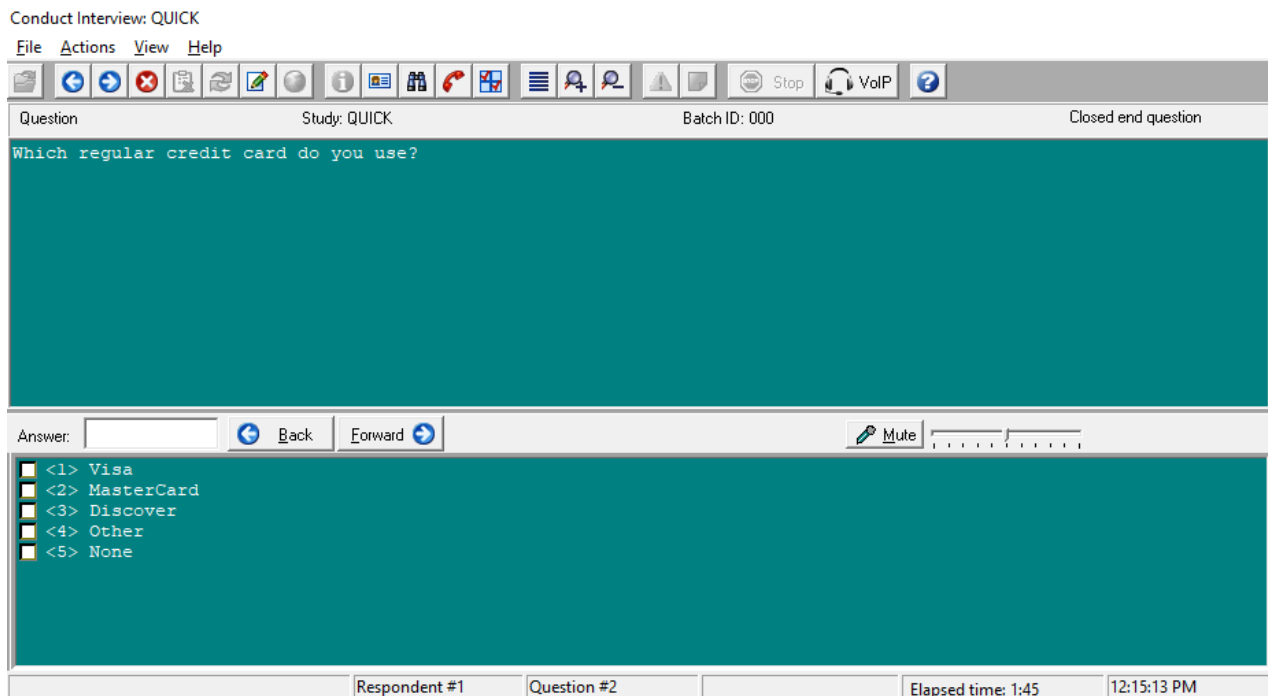
The **VoIP** tab of the **Preferences** dialog box allows you to enable **VoIP** (Voice over Internet Protocol) dialing on this station. See WinQuery's online **Help** for more information about **VoIP**.

☐ Select **Cancel**.

Question <1> is displayed. This time, choose the Yes answer choice. To do so:

☐ Double-click the answer, Yes (alternatively, you can press Y, then ENTER.)

Question <2> is displayed:

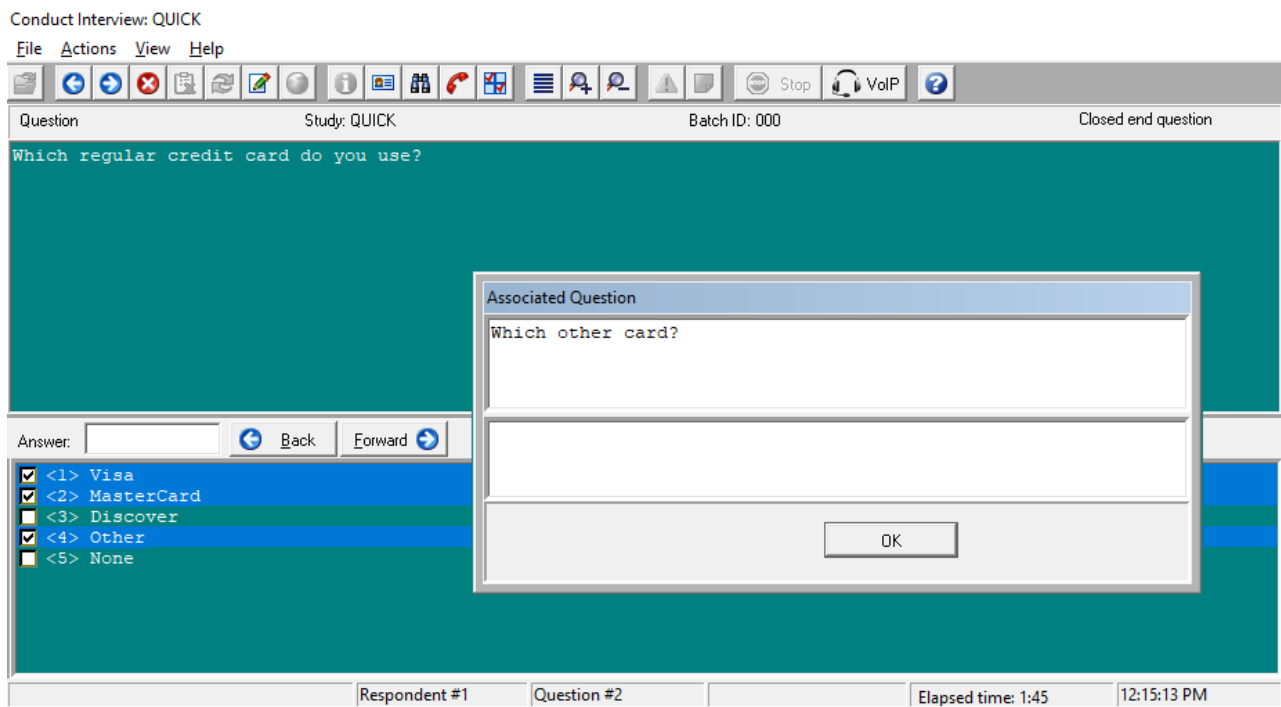


- ☐ Select the answer, Visa, then select None. (Alternatively, you can press **V,ENTER,N, ENTER.**)

A message appears, reading: You cannot select 'None' if other answers are already selected. This is because you specified None as a mutually exclusive answer choice when you created this question. Once you've selected any other answer, you can't select None. Additionally, once you select None, you cannot select any other answer choice.

- ☐ Select OK to close the Mutually Exclusive Answer message box.
- ☐ With Visa still selected, select Other. Or press **O**, then **ENTER.**)
- ☐ Enter as many responses as you like, pressing **ENTER** after each entry to advance to the next line.
- ☐ Select **OK**.

You can make any other valid choices as desired before advancing to the next question. To “undo” a choice, click it once to deselect it.



- ☐ Select **Forward** to advance to the next question.

Note: Double-clicking any selection is the same as selecting that item, then selecting **Forward**. Remember you can select **Back** if you unintentionally double-click an item, thereby advancing to the next question.

Let's double-check the responses to the previous question.

- ❑ From the Conduct Interview menu, choose **View|View Previous Answer**.

View Previous Answer

Questions:

- 1> Do you have a bank ATM/debit card?
- 2> Which regular credit card do you use?
- 3> Which other card?

Question: 3

Which other card?

Answers:

American Express

OK

The **View Previous Answer** dialog box displays the results of Question <3>, Which other card?, along with the data you entered a moment ago in the **Associated Question** dialog box.

- ❑ In the upper left portion of the **View Previous Answer** dialog box, select the Question <2> item.

You can now view the answer choices you selected in response to the previous question in the lower portion of the **View Previous Answer** dialog box.

- ❑ Select **OK** to close the **View Previous Answer** dialog box. Question <4> is displayed in the **Conduct Interview** dialog box:

Conduct Interview: QUICK

File Actions View Help

Question Study: QUICK Batch ID: 000

What do you dislike most about ATM/debit cards?

Open end answer

Back Forward

I get them mixed up with other credit cards.

Respondent #1 Question #4 Elapsed time: 1:45 12:15:13 PM

The answer choice text you entered in **Build Questionnaire** for this question, Specify, is not displayed. When you create a question and enter only one line of answer choice text, WinQuery automatically identifies it as an open end question. Any words are acceptable as answer choice text, for they are just used for open end identification.

Text wraps automatically at the end of each line.

- ☐ Enter a long response.

You can use the cursor arrow keys in addition to the **INSERT** and **DELETE** keys to edit your response.

- ☐ Select **Forward** when you've finished. The final question is displayed.
- ☐ Select **Forward** to conclude this interview.

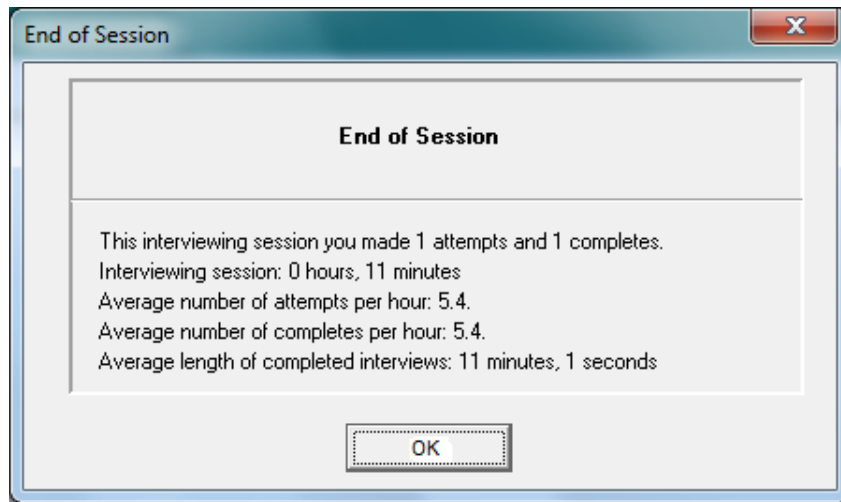
A message box now asks whether or not you would like to conduct another interview.

Do you want to do another interview?

Yes No

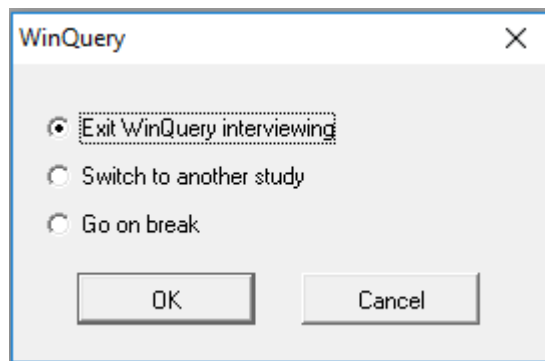
- ☐ Select **Yes** or **No**.

If you choose to conclude interviewing, the **End of Session** dialog box displays a summary of the interviewing session.



- ☐ Select **OK** to close the **End of Session** dialog box.

A message box now asks if you would like to exit WinQuery interviewing or switch to another study.



- ☐ Select **Exit WinQuery interviewing**.
- ☐ Select **OK** to return to WinQuery's supervisory module.

You are now returned to WinQuery's supervisory module from which you started.

Stopping an interview—**Note:** You can stop (halt) an interview at any time by choosing **Actions|Halt** from the **Conduct Interview** menu (or by pressing **CTRL|H**). The **Halt Interview** dialog box then prompts you to select a disposition code or you can select **Cancel** to resume the interview. You can also **Mid-Interview Terminate** an interview using the **MIT** button in **Conduct Interview** (or by selecting **CTRL|M**) if this feature has been selected in **Management|Dispositions|Create WinQuery Dispositions|Define MIT Button**

Now you've had experience using WinQuery to build a questionnaire and conduct an interview. While our tutorial example helped you build a simple questionnaire, WinQuery is also quite capable of helping you create complex questionnaires with many advanced features.

15. Customizing your questionnaire for web interviewing using QueryWeb Designer®

QueryWeb Designer, included with WinQuery, allows you to design your WinQuery questionnaire for QueryWeb hosted interviewing using The Analytical Group, Inc.'s hosting service, QueryWeb. QueryWeb Designer can be accessed directly through WinQuery by selecting **Management|Design for QueryWeb** or clicking on the **Design for QueryWeb** shortcut from the WinQuery toolbar.

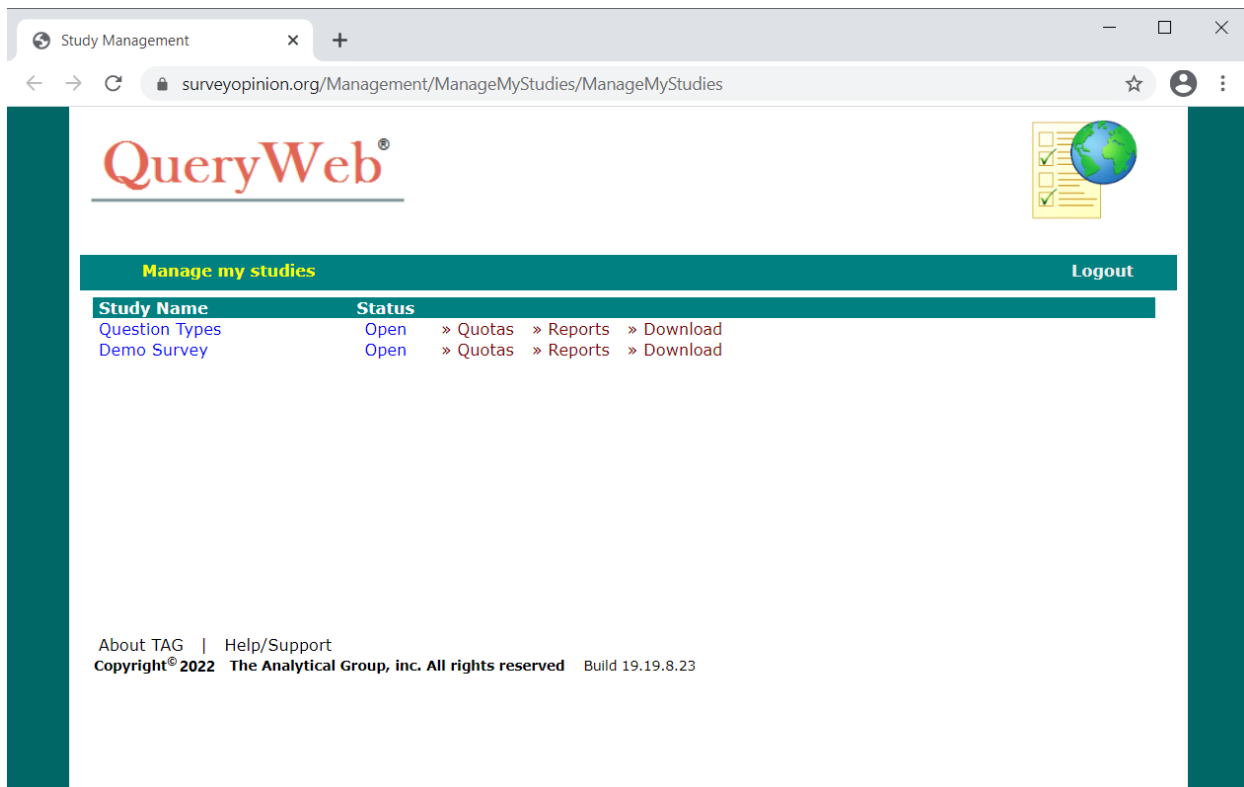


In addition, you can use the QueryWeb Designer desktop shortcut created during the installation.

Once your WinQuery questionnaire has been programmed and tested, you can easily make the necessary changes for QueryWeb interviewing. Specifying question and answer options, interview settings, font size, font color, screen presentation, and adding images, video clips and audio files are all easily accomplished using QueryWeb Designer.

QueryWeb Host Service

To conduct your WinQuery/QueryWeb survey please contact The Analytical Group, Inc. for current hosting pricing. TAG will set up a secure site on their Web Server for your company. Once this secure site has been established, you may access this site through the Internet using a company specific Internet address. Please visit <https://www.analyticalgroup.com/QueryWeb.html> for a demonstration. QueryWeb host enables you to upload study files, run reports, change quotas, set report options, conduct an Internet interview using the questionnaire, review the questionnaire, download WinQuery compatible data, and close a study or reopen a study.



Major Components of QueryWeb Designer

QueryWeb Designer has two major components, the **Introduction page**, and the **Questions page**. Selecting the **Introduction page** tab allows you to create and design the opening screen for the QueryWeb interview. On the Internet, this screen automatically leads into the questionnaire. The **Questions page** tab allows you to customize the appearance of questions from your WinQuery questionnaire for QueryWeb interviewing.

*Note: Displaying the **Introduction page** for QueryWeb interviewing is optional.*

Introduction page

The screenshot shows the QueryWeb Designer application window. The title bar reads "QueryWeb Designer - k:\queryweb\playweb\playweb.que". The menu bar includes File, Edit, View, Insert, Format, Table, Window, and Help. The toolbar contains icons for file operations and formatting. The left pane shows two tabs: "Introduction page" (selected) and "Questions page". Under the "Introduction page" tab, there are several sections: "Introduction page options", "Web page title" (with a text box containing "QueryWeb"), "Access code" (with a checkbox for "Sample file"), "Autofill name:" (with a text box), "Autofill default:" (with a text box), "Redirection URL" (with three text boxes for Completion, Termination, and Over quota, all containing "http://www.analyticalgrc"), and three checkboxes: "Save points" (checked), "Interview once per computer", and "Display introduction page". The main workspace displays a preview of the introductory page with the text "This is the introductory page of the interview. Replace this text with your introduction." and a "Begin Survey" button.

Introduction text is the text for the opening screen of the QueryWeb interview. **Introduction text** for your study can be entered and edited. A **Begin Interview** button will automatically appear in the center of the screen, below the introduction text.

Web page title allows you to enter text that appears on the title bar for each page of the QueryWeb interview. The title bar appears at the top of your Internet browser and the **Web page title** is in the upper left corner of the title bar. Font style, size and color of the title bar are determined by the respondent's browser and cannot be customized.

Select the **Access code|Sample file** check box if a sample file will be used for security purposes. The access code is a unique identifier for each respondent participating in the QueryWeb interview and resides in the sample file.

The **Redirection URL** boxes are used to redirect the respondent on completion, termination or upon over quota to a specific Internet location.

By default, the **Save points** check box is enabled to save partially completed interviews to the **batches** folder. It is not necessary for the respondent to select the **Quit** button in their Web browser for partial interviews to be written to the **batches** folder when this feature is enabled. Choosing the **Save points** option is recommended but not required.

The **Interview once per computer** check box is selected to prevent a respondent from completing more than one interview per computer.

By default, the **Display introduction page** check box is enabled to display the **Introduction page** at the start of the QueryWeb interview. If this option is not enabled, the interview begins with the first question of the QueryWeb study.

Questions Page

The **Questions** page tab allows you to customize the appearance of questions from your WinQuery questionnaire for QueryWeb interviewing.

The screenshot shows the QueryWeb Designer application window. On the left is a sidebar with 'Questions page options' and 'Navigation' sections. The main area displays a preview of a 'Rating' question titled 'Please indicate how much you agree or disagree with each of the following statements...'. The question is presented in a table format with five columns for ratings from 1 to 5, ranging from 'Completely Disagree' to 'Completely Agree'. The statements to be rated are:

	1	2	3	4	5
Burgers go best with fries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I always get bored ordering from the same burger restaurant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I like more fancy burger flavors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I prefer burgers that are made with fresh toppings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I do not like to eat from the same burger restaurant twice in a row	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I've stopped eating burgers because the wait is too long	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Below the table are 'Previous' and 'Next' navigation buttons. At the bottom of the preview area, it says 'Survey powered by QueryWeb'.

Questions page options are question type dependent. If an option cannot be selected, that option is not valid for the type of question you are customizing.

Questions|**Show comments** displays comments that were entered when the question was added in WinQuery using **Management**|**Build Questionnaire**|**Questions**|**Add**. Comments begin with the ! symbol in column one. The comment is only displayed in the **Questions** list box on the **Questions** page tab in QueryWeb Designer and is not displayed during the QueryWeb Internet interview.

Questions|**Select all** lets you select all questions listed in the **Questions** list box.

Use drop-down menu may be specified for a single choice closed end question. When this feature is enabled, the respondent must select a pre-specified answer from the drop-down menu to continue to the next question.

Allow blank answers may be selected to allow the respondent to pass by the specified question without inputting an answer.

Sum numeric closed ends sums together the total answers for numeric closed end questions and displays a running total when this option is selected.

Display on one page allows a series of consecutive questions to be grouped and displayed on one page. This is useful for address forms.

Display as one page matrix allows single choice or multiple choice questions to be displayed on one page as a matrix for convenient answer selection. In order to use this display type the question grouping must consist of a text screen followed by single or multiple choice questions with identical answer lists. Each question must branch to the following question within the one page matrix. The question text from the text screen becomes the question text for the matrix. The question text from the single or multiple choice questions become the items to be rated. See the QueryWeb Designer online **Help** topic **Matrix display type** for more detailed information on using this display type.

Selecting the **Display status bar** check box places a status bar on the bottom of the screen.

Selecting the **Highlight** checkbox engages the text highlight question type.

Add slider bar allows the display of a slider bar for answering a question type that requires an answer as a numeric range.

Navigation|Use image buttons specifies the use of back, quit, and next buttons with images (i.e. the **Next** button would have the image of a right facing arrow).

Navigation|Show back button specifies the display of the **Back** button.

Navigation|Show quit button specifies the display of the **Quit** button.

Navigation|Show next button specifies the display of the **Next** button.

Navigation|Insert location specifies the insertion point, **Top left**, **Top center**, **Top right**, **Bottom left**, **Bottom center** or **Bottom right** for the navigation buttons selected.

Question formatting allows you to adjust the questionnaire frame and answer layout.

Question formatting| Frame provides the ability to choose from default questionnaire frames outlining the questionnaire. Choose from **Solid**, **Dashed**, **Dotted**, **Double**, **Groove**, **Ridge**, **Inset** or **Outset** frame types. You can also choose **None** to not use a questionnaire frame. The Questionnaire frame background color and other properties can be modified under **Format|Background|Questionnaire** frame background.

Question formatting| Layout provides the ability to choose answer display layouts of **Vertical** (default), **Horizontal** or **Matrix**.

Note: **Horizontal** and **Matrix** layout is only available for single and multiple choice closed ended questions.

The Analytical Group now invites you to view the PLAYQUE questionnaire and QWEBTYP web questionnaire—installed with this software—to learn how WinQuery functions with a more complex questionnaire. You can also explore other **Management| Build Questionnaire** options to get a taste for all that WinQuery offers.

Even WinQuery's most advanced features are easy to use. It does the complex work so you don't need programmers on staff to create questionnaires. This allows you to put all of your effort into your real goal—providing quality research!

More About WinQuery

This short introduction to WinQuery can't begin to showcase all of its important features. Along with advanced questionnaire-building features, WinQuery offers complete study management capabilities, including sophisticated:

- ✓ International interviewing as well as multiple languages capabilities
- ✓ Sample preparation, management and complex quota control
- ✓ Sample management for calling patterns and callbacks
- ✓ Multimedia playback and recording of open ends
- ✓ Management, visual monitoring and tracking of interviewers
- ✓ QueryWeb-compatible questionnaire creation for Internet interviewing

WinQuery lets you edit data and code open ends. Additionally, there are built-in data processing capabilities for marginal, crosstab, numeric progression and sigma analysis reports. Of course, you can export data to any statistical or crosstab application, including our own WinCross—the most widely used tabulation software designed especially for the marketing research community.

The Analytical Group, Inc., also offers other software and market research services, from questionnaire development all the way through advanced data analysis. Visit us on the Web at www.analyticalgroup.com. You can also contact us at info@analyticalgroup.com.



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