

SurveyPro4

KeyCollect User Guide

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KeyCollect 4.0 User Guide

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Chapter 1

Getting Started

Using this Guide

This help system is your primary reference for KeyCollect 4.0, including:

- KeyCollect concepts
- Data entry instructions
- Dialog box and menu reference

Both the printed (Adobe Acrobat PDF) version of the guide and the Help system contain the same information.

Additional Resources

Discussion List and Newsletter

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

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

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

Knowledge Base

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

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

Technical Support

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

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

Coaching and Training

Apian offers public workshops, on-site corporate training, and one-on-one telephone coaching.

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

Downloads

Updates (patches) to SurveyPro and NetCollect are provided for you to download free of charge.

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

Installing KeyCollect

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

1. On the system where SurveyPro is installed, locate the KeyCollect installation file—usually at:
C:\Program Files\Apian Software\SurveyPro 40\Install Accessories\
2. Copy the install program to the system or LAN server on which you want KeyCollect
3. Make sure to have your SurveyPro 4.0 serial number available and run the install program

Each installation of KeyCollect will support 10 concurrent users. However, there is no limit to the number of data entry stations you can set up, so if you need additional users simply install another copy.

Database Fundamentals

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

Form = Record = Respondent

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

Field = Question

When you're designing your survey, each question you add creates a field in the database. This field definition includes information on the values it can accept, such as numeric, date, written, or multiple answer checkbox. In some cases, a single question tile will actually add several fields, such as with grids, or checkbox scales with Other blanks.

Database vs. Data File

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

Form ID

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

Chapter 2

Menus

This chapter includes an overview of the different menu items, as well as the common dialog controls used within KeyCollect (see page 7).

Menus

KeyCollect's menus are:

File	Common Windows file functions, such as print, save, and most recent files. See the next section.
Edit	Cut, copy, paste, and other functions. See page 5.
View	Preferences for which screen elements to display and how. See page 5.
Form	Navigate among forms. See page 5.
Database	Functions for changing many forms at once. See page 6.
Tools	Utilities and preferences. See page 6.
Help	Access to the Help system, which contains the complete manual content. See page 6.

File Menu

Here you'll find common Windows file functions, such as print, save, and most recent files.

Open Ctrl+O	Opens an existing SDE data file.
New From Template	Starts a new SDE data file from a SDT template.
Print with Data	Allows you to print the forms filled in with all or some of the data. This is useful for "mail merges" of address information or ID barcodes, or for looking at individual responses in the context of the survey. See page 28.
Recent File List	Lists recently accessed files.

Exit | Alt+F4 Closes the current file (prompting to save changes), and exits KeyCollect.

Edit Menu

Editing responses within forms as well as some data entry preferences.

Cut | Ctrl+X
Copy | Ctrl+C
Paste | Ctrl+V Standard Windows functions for cutting, copying or pasting the selected text. This can be used to copy and paste text between KeyCollect and other applications, as well as within or between KeyCollect projects.

Delete | Del Clears the current answer.

Copy Last Form's Answer | F7
Copy Last Form | Ctrl+F7 Copies either the answer from the same question in the previous form, or the entire contents of the last form—in either case, overwriting the current answers. If you are doing this frequently to copy session or batched answers, you can also use the View menu's Master form to pre-load answers in each new form.

Auto Increments Specify number questions and have them automatically increment by one with each new form.

Protect Answers Prevents accidental changes to forms in the database. See page 27.



New Form Questionnaire In a multiple questionnaire project, changes the document used for adding forms to the database. See page 11.

View Menu

Zoom Adjusts the display size of the document.

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

Form Menu

Next Form | F10 
Last Form | F9  Step forward and back through the forms. When you reach the last form, F10 will add a new one.

Find Form Select
Find Same Answers
Find Duplicates A set of tools for navigating and cleaning the forms and the database. Each one pops up a small palette which lists forms matching a Form Select, the response of the current question, or is a duplicate. Within the

palettes, click on a form number to jump to that record, or Refresh to update the list when you make changes to your criteria or the data. See *Understanding Data Cleaning* on page 15.

Delete Form | Ctrl+F11
Void Form | Ctrl+F12

With Delete, the form is completely removed, which renumbers the forms after it in the database. Void leaves a placeholder to maintain form numbering, but also eliminates the form's data. See also *Mass Delete* on page 22.

Database Menu

Mass Delete

Deletes forms matching a Form Select, within a range of form numbers, or for the entire database. See page 22.

Mass Replace

Replaces the response to a question based on a Form Select, within a range of form numbers, or for the entire database. See page 21.

Answer Replace

Replaces one particular answer to a question with another—a quick way to consistently code short written answers. See page 19.

Fill Passwords

Seeds forms in the database with a password value, for use with mail merges or other notifications. See page 28.

Tools Menu

Spell Check | F7

Checks spelling for responses in the current question, form or the entire database. See page 18.

Spelling Options

Allows you to control what the spell checker should ignore, edit your custom dictionary, and activate the legal and medical supplements.

Refresh Answer Lists

Forces an update of the Answer list in the left panel. To speed performance, KeyCollect updates this list with new entries instantly, but only removes deletions on Refresh or Save.

Data Cleaning

Similar to the import cleaning screen, this allows you to clean the contents of your database, checking for required fields and pattern matches. See page 16.

Options

Preferences for both the current file and for your system. See page 23.

Help Menu

Contents or Index

Jumps to the contents of the Help system.

About KeyCollect

Displays the version, serial number, license, and legal notices.

Common Dialog Controls

Within the KeyCollect dialogs you'll see these buttons used many times, always with the same function.

Some or all of these buttons appear whenever a named object, such as a Form Select Filter, is used in a dialog.



Insert

Insert is used to add a new object.



Modify

Modify edits the object (updating all dialogs referencing/using it)



Delete

Delete removes an object.



Duplicate Buttons

Duplicate allows you to create a new object starting with the settings of the currently selected item.

Chapter 3

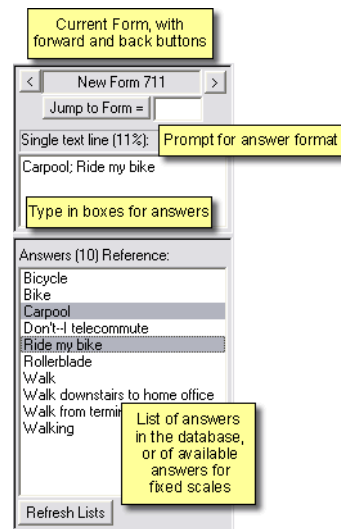
Entering New Forms

Data entry has been optimized for both the mouse and keyboard, including features such as single keystroke entry for shorter checkbox and rating scales.

To Enter Responses

While the data entry screen shows an image of the questionnaire, it is only used as a reference. The actual entry and editing of a response occurs in the panel on the left hand side (see image below).

1. **File, Open** an existing SDE data file, or **File, New from Template** to create a file from a SDT.
2. **Select a question** on the right-hand side by Tabbing or clicking until you see an orange outline on the one you want.
3. **Click an answer** in the list, or **type an answer** based on the prompt line's reminder of the format.
4. Repeat 2 & 3 until you reach the end of the form, press **F10** for the next form, and repeat!



There are of course some additional nuances, as covered here and in *Data Entry by Scale Type* on page 10, but that's essentially how KeyCollect works. See also *Understanding Data Cleaning* on page 15.

Moving from field to field

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

Moving from form to form

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

Tools, Options dialog

The first tab of the Options dialog (see page 23) includes two settings to streamline data entry. The first, Do not require Enter key on single-digits, means that when a checkbox or rating has less than 10 items, one numeric keystroke will mark the response and drop you to the next question. The second, Go to next form after last question answered eliminates the need for clicking next or pressing F10.

Pre-loading answers

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

- Copying answers from other forms** The Edit menu includes two commands for copying responses from the previous form. Copy and paste can also be used to paste text into the entry box.
- Spell check** Spell checking may be applied to written answers in a single response, a form, or the entire database. See page 18.

Data Entry by Scale Type

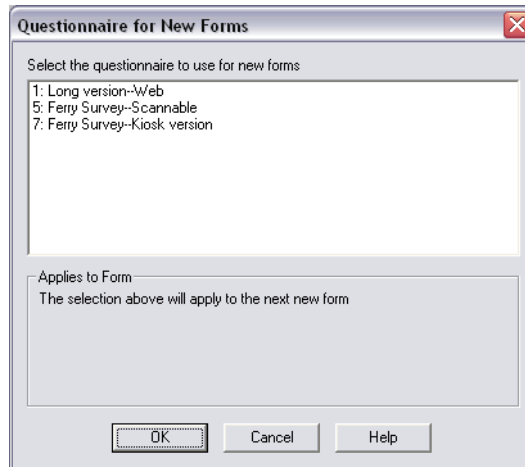
Depending on the current question's scale, you will need to enter the answer in a particular format. Just above the type-in box is a prompt line which will remind you of the scale type.

- Single answer checkboxes, Ratings and Rankings** Type the number of the response or double-click on an answer in the list. You don't need to enter the complete label.
- Multiple answer checkboxes** Type one or more numbers to indicate the box or boxes checked. As each checkbox number is entered, a highlight will appear in the Answers list. Numbers may be separated by spaces, commas, periods, plus +, minus -, or slash / keys. For mouse entry, click on the first answer you're marking, then Shift+click for sequential entries or Ctrl+click to turn on and off non-sequential items.
- Number scales** Enter the number value without any "\$," "%" or other symbols. The Answers list will also display existing responses which you can click to select.
- Dates and times** Check the prompt line above the type-in box for the scale's preferred format. KeyCollect will accept any unambiguous response in the same month/day/year or hour/minute/second order as the scale structure.
- Patterns** The underlying structure of a pattern is one of the three Written Answer formats (short, short multiple, long unique). KeyCollect's strictness on the entry (allowing spaces, etc.) depends on the definition of the pattern.
- Short, countable written answers** Type in the response, up to 200 characters (the prompt line will let you know how much space you've used). If it is a multiple answer scale, use a semicolon ";" to separate distinct responses such as "cat; dog." The Answer list will display up to 64,000 unique responses, which you can select by clicking. Short countable written answers are always one line, so Enter will drop you to the next field.
- Long/unique written answers** Long/unique answers may be up to 10,000 characters, and as with short written answers the prompt line will keep track of your capacity. Normally long written answers allow multiple paragraphs, but they can also be set to Single Line for shorter unique answers such as names.

Questionnaire for New Forms

Accessed from the Edit menu.

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



Double Entry with Verify

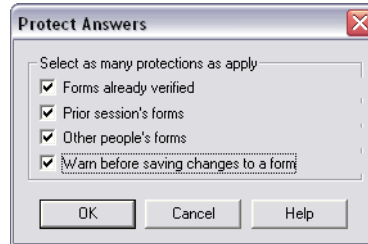
Verify provides a way to enter forms a second time, then have KeyCollect display any discrepancies to be corrected if needed. By entering a second time, preferably by a different person, the odds of making exactly the same operator entry error twice are small, leading to a high probability of getting the corrected entries exactly right. Verified forms can be protected against further changes.

Procedure

When the forms are first entered into the file, be sure to note which form number is assigned by KeyCollect. This will be required to match the paper questionnaire up with the computer's forms later. It will also help to keep the paper forms in neatly ordered piles in case a form number is not written down sometimes.

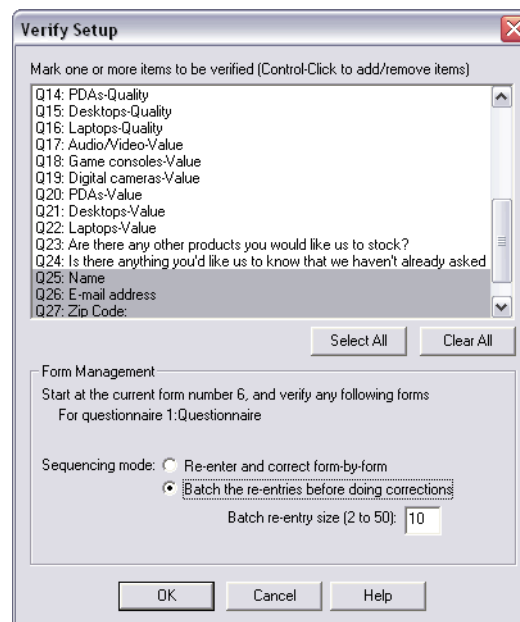
To start verify open the .SDE file in KeyCollect if it is not already open. Starting a new KeyCollect session is normal when a different person handles the re-entry.

Confirm that **Edit**, **Protect Answers** are set as desired to allow the verify operation and usually to protect previously verified forms (verify will skip over any protected forms):



Step to the first form to be verified in this pass. It must be a paper form and not a protected form.

Select the menu Database, Start Verify Re-Entry which will bring up the dialog on the next page.



At the top is a multiple-selection list of all the questions in the questionnaire, where by default all the questions are selected. You can verify a subset by using the control key with a left mouse click to turn items on or off individually, or use the Select All or Clear All. At least one question must be selected.

The Forms Management section reminds you that verify will start at the current form, stepping forward through all forms using the same paper

questionnaire layout as the first one. If any forms are protected it will say those will be skipped over too.

You can do the verification two ways:

- Form-by-form where you re-enter a form, then correct any mismatches, then go to the next form until the file is completed.
- Batch where you do the re-entry of a batch of forms in one pass, and then do a correction pass. This choice includes a selection of the batch size which will alternate between re-entry and correction until the file is done.

There is no need to set an ending form number because the menu Database, Stop Verify lets you halt the session anytime you wish.

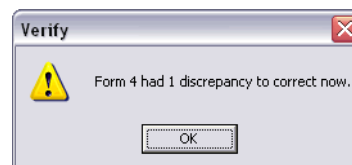
Once you have the setup dialog ready and click ok the form will have show the data entries of all the setup's selected questions in green. These are the ones to be re-entered from the original paper master. When you have the re-entries complete click the next form button. What happens here depends on whether it is batch more or not; see below.

When a form is presented for correction one or more questions will have a red data entry area with the original answers set. These are the questions where the first and second entries disagreed in value (case-independent for written answers). Either leave them alone or change to fit the paper form.

Note: you cannot go back to the previous form in verify mode.

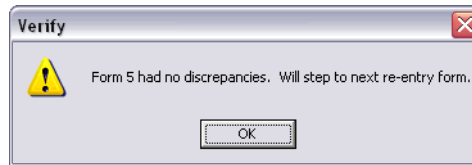
Form-by-form

On next form from re-entry, if there were discrepancies it will give this notice:



Clicking ok shows the mismatched questions in red.

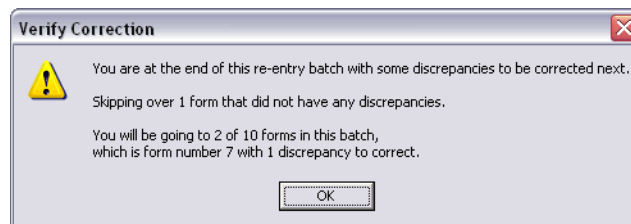
If there were no discrepancies you will get a different notice:



Clicking ok here goes to another form for re-entry. This will be the next form with the same questionnaire that is not protected.

Batch

As you do the re-entry it will step to the next form just like normal entry until it reaches the end of the batch when this notice pops up:



This dialog tells you several things:

- It has gotten to the end of a batch (10 forms in this example)
- The first form in the batch was skipped because it did not have any problems to resolve
- The form to be presented for correction is number 7 with 1 mismatch.

Note there are two types of form numbers in the last sentence of the dialog: the count within the batch (2) and the number assigned in this data file (7). Since everything is tied back to form number this is why *it is essential to number the paper forms as they are entered so you can find the ones to be corrected later.*

When ok is clicked form 7 appears with the mismatches in red. Clicking the next form button after corrections will show a notice like the one above for the next problem form if any, or it will let you know the batch is done.

When the batch corrections are done, KeyCollect will either switch back into verify re-entry mode to continue with the next batch or end the verify session.

Chapter 4

Editing Forms

Forms can be edited individually as needed, or using mass replace tools to consistently code responses.

Understanding Data Cleaning

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

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

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

Questionnaire Definition

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

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

Publish

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

Import

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

Answer Entry

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

For existing forms, there are several tools available. Use the Cleaning dialog under the Tools menu to perform a scan similar to import's (see page 16). Manual corrections are facilitated by the Find commands under the Form menu. Find Form Select uses a filter (see page 25) which has great flexibility; Find Same Answers looks for matches to the current question's response; Find Duplicates lets you locate copies of either a complete form or a single answer. Finally, the Database menu has the ability to Mass Delete forms (see page 22), Mass Replace answers (see page 21), or Replace Answers within a single question (see page 19).

Analysis

If for some reason you want to exclude forms which are incomplete or have other problems from your analysis, use Form Select Filters or Report On in SurveyPro.

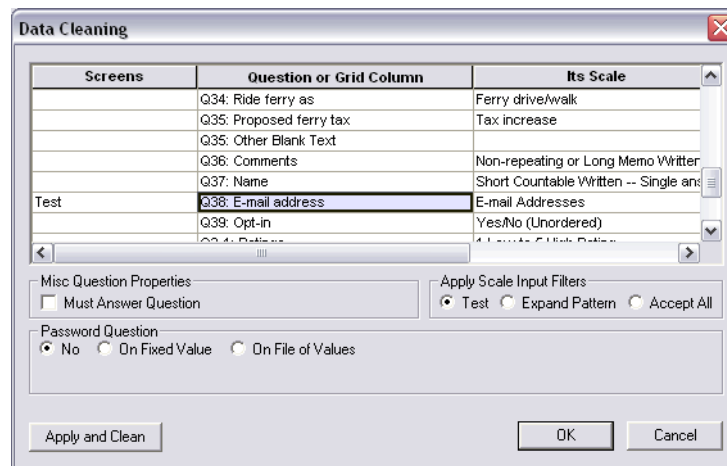
Data Cleaning Dialog

Accessed from the Tools menu.

This dialog is very similar to the ones during import, and allows you to manage your database after collection. If you're new to data cleaning or KeyCollect, you may want to start with the overview on page 15.

The options in the lower half of the dialog depend on the structure of the selected question or grid, so if you don't see an option you need, check your scale definition. Questions which don't have a screen indicated in the first column will be ignored when you click Apply and Clean. Must

Answer is the only one which applies to all question types—the other controls are covered further down this page.



Screens column

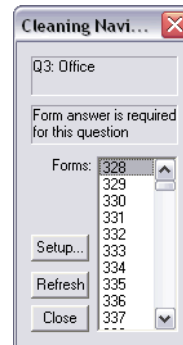
The first column lists the “test” which will be performed on the data, such as a password screen or pattern check for an ID.

Must Answer Question

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

Cleaning Navigator

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



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

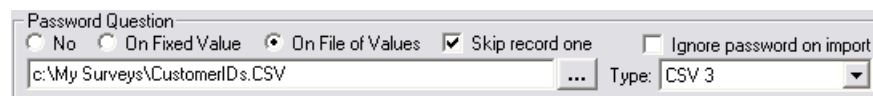
Checkbox and Rating Scales

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



Written Answer and Pattern Scales

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

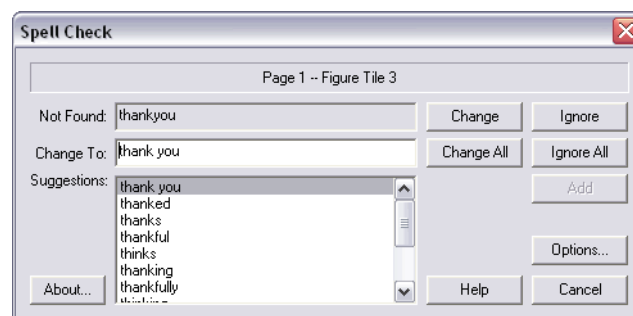


In addition, pattern scales can be enforced or loosened to allow data through.

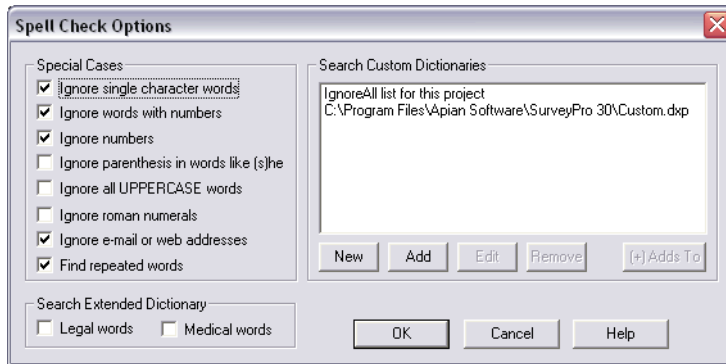


Spell Check Dialog

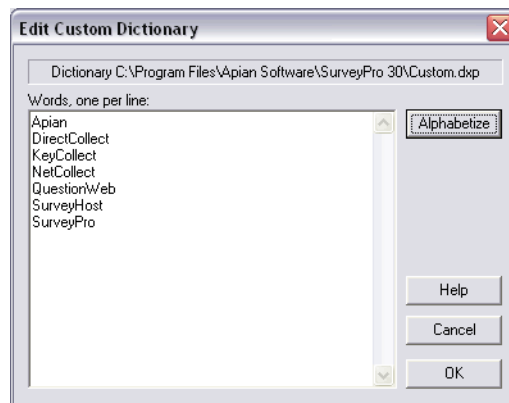
KeyCollect checks the spelling of all written responses in a single form, or your entire data file.



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



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



Answer Replace

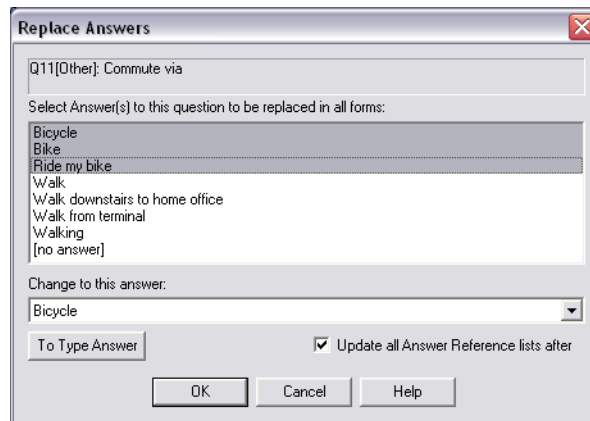
Accessed from the Database menu.

Answer Replace literally replaces one answer with another within the same question. Mass Replace can also do this, but takes a little longer since it's geared for more complex replacements (see page 21).

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

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

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



Select Answer(s)

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

Change to this answer

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

Type Answer

Toggles the drop-down list to a type-in field and back. Only appears for written, date, number and pattern scales.

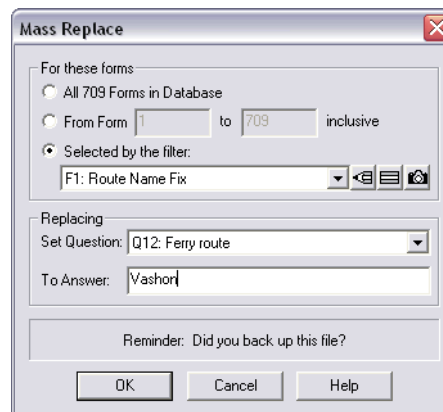
Update all Answer Reference lists

Updates the answer list for the current question when you finish the replacements. Generally you will only want to disable this if you are doing repeated replacements on the same question in a very large database.

Mass Replace

Accessed from the Database menu.

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



For these forms

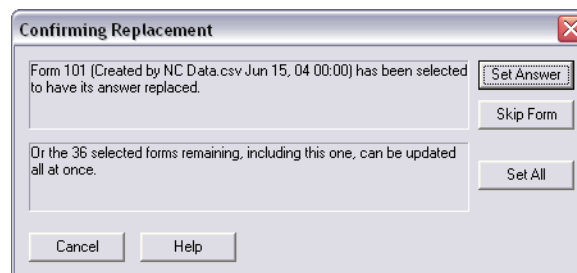
Select the entire database, a range of form numbers, or use a Form Select Filter (see page 25) to target forms with specific answers.

Replacing

Select the question whose answers you'd like to replace, and type the new response. Mass Replace bases its replacements on the form selection above, not the current contents of the question (unless you base your selection filter on them).

Confirmation

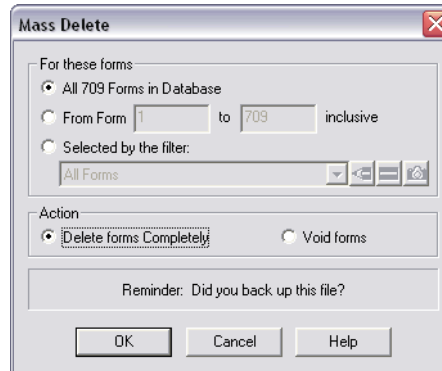
When you click OK, you'll be prompted with a confirming dialog. You can either update the forms one-by-one, update all at once, or cancel the operation.



Mass Delete

Accessed from the Database menu.

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



For these forms

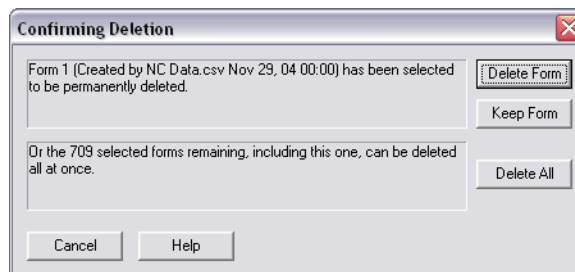
Select the entire database, a range of form numbers, or use a Form Select Filter (see page 25) to target forms with specific answers.

Action

Delete removes a form completely, renumbering the remaining forms. Void leaves a placeholder for the form number but removes all the data.

Confirmation

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



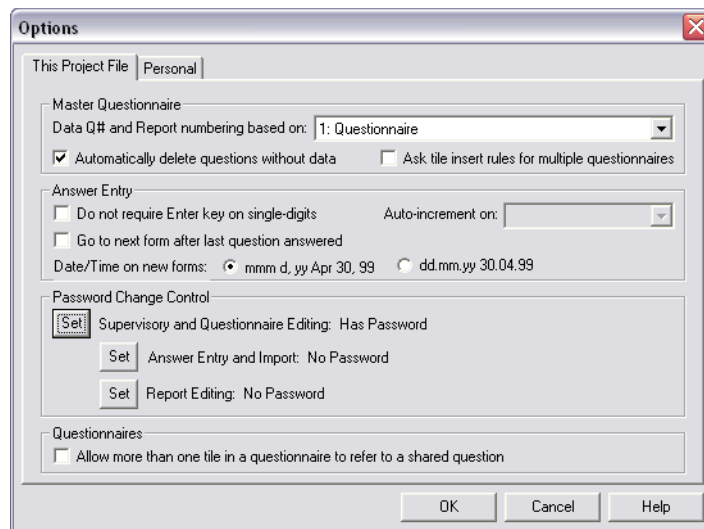
Chapter 5

Tools and Options

In addition to the Options you may use to streamline data entry, there are also some utilities which are useful for selecting forms (see page 25), protecting responses (see page 27), printing copies of answers (see page 28) or adding passwords or IDs to responses (see page 28).

Options Dialog

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



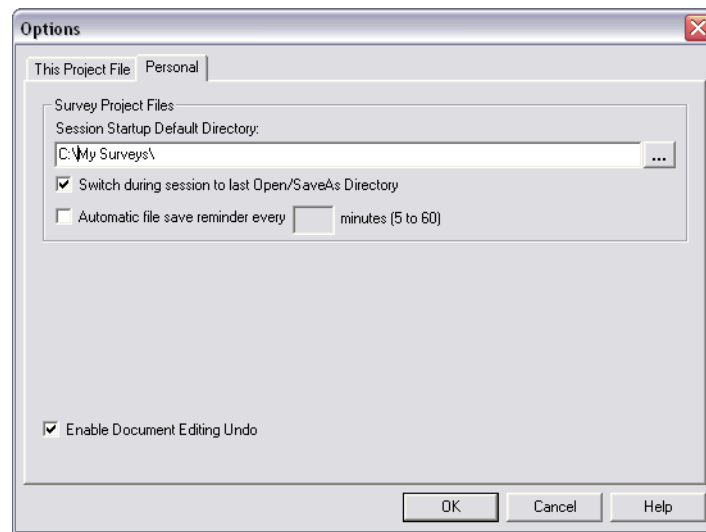
Data Q# and Report numbering

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

Automatically delete questions

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

Ask tile insert rules	When you have multiple questionnaire documents, inserting new questions involves a prompt for whether you want to add the tile to all questionnaires or just that one survey. At the bottom of that prompt dialog is an option to stop asking—this setting turns the prompt back on.
Do not require Enter key	To speed data entry, you can have KeyCollect automatically drop to the next question after entering an answer to single-digit scales.
Auto-increment	Select a question to automatically increment as you enter new forms. The question must have a number scale.
Go to next form	After the last field is entered on a survey, Tab will take you to a new form when this is enabled.
Date/Time on new forms	Switch the format for KeyCollect's internal date/time stamp from American to European.
Password Change Control	<p>By default, KeyCollect files are open for any editing. The first level password prevents unauthorized users from making edits to the questionnaire or the password settings. You can then add passwords which will restrict data entry/import, and reporting.</p> <p>When a protected file is opened, it has these areas locked using the setting in the Edit menu. To unlock, click on the area, and enter your password.</p> <p>Note that your internal LAN security can be used to protect entire files from access by unauthorized users.</p>
Allow more than one tile in a questionnaire	Normally, when you copy and paste a question within one document, the pasted tile is added as a new field in the database. In some advanced survey designs, you may want the same question (by Q#, not just visible text) to appear more than once in the survey. Be certain the multiple locations are exclusive skip paths, as any later instance of a question for one respondent would overwrite the original instance.



Session Startup Default Directory

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

Switch during session to last

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

Automatic file save

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

Enable document editing undo

If you do not use the Undo function, disabling it might enhance SurveyPro's performance. However, before turning off Undo, try closing any documents you're not actively editing as this also speeds file changes. With a newer system with sufficient RAM, you will rarely need to turn off Undo.

Form Select Filters

Form Selects are used any time you want to look at a sub-set of forms while data cleaning (see page 15).

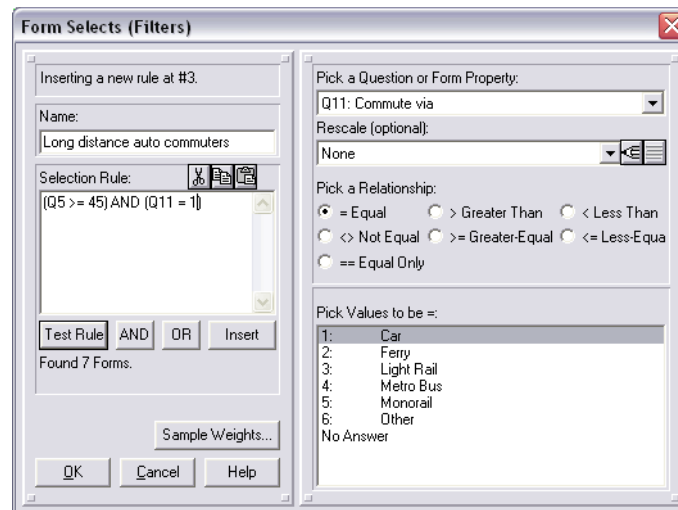
While filters can be manually constructed using the type-in box on the left, the easiest approach is to have SurveyPro build it. To create the AND rule in the screen capture below:

1. Select the first question, **Q21** from the drop-down list
2. Click = **Equal**
3. Select checkbox 1, **Small Business**
4. Click the button labeled **Insert** on the left hand side

5. Click **AND** to add the parentheses
6. Select the second question, **Q20**
7. Click **>= Greater-Equal**
8. Select checkbox 4, **\$400-599**
9. Click your mouse inside the second set of parentheses
10. Click **Insert**

You'll find it takes longer to read these instructions than to create the rule itself. If you create complex rules with many ANDs and ORs, be very careful to check your parentheses.

The Test Rule button is always a good idea to check your syntax and see if you're getting about the right number of forms.



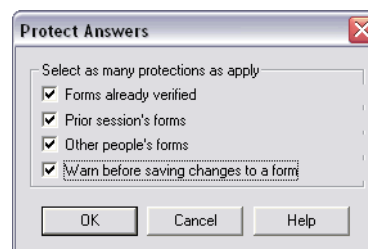
- Name** Filter names can be up to 200 characters, though shorter is usually better.
- Selection Rule** The actual specification of what forms to find. Rules can be created or edited by hand, but generally it's easiest to build them with the right-hand panel.
- Test Rule** Provides either the number of forms it found or an error statement if it has a problem with the rule's syntax.
- And/Or** Add parentheses around the existing rule, the word AND or OR, and an empty set of parentheses at the end of the rule. Depending on the rule you are constructing, you may need to adjust the parentheses.

Insert	Transfers the rule you constructed on the right-hand side into the text box. If the Insert button is grayed out, you need to first click in the text box to tell it where to insert.
Pick a Question or Form Property	Lists the questions in the file, form attributes such as the date/time stamp or questionnaire, and any Form Selects you have already defined.
Rescale	Applies a rescale to the question, handy if you have already grouped some checkboxes into categories, or dates and numbers into ranges. When a rescale is applied, it will read R7(Q3) in the rule, meaning the 7th rescale applied to the 3rd question.
Pick a Relationship	Sets the relationship between the question or form attribute and the value. Equal Only == will pull a response which is exactly equal to the selected Value, and equal to no others (applies primarily to multiple answer checkboxes and written answers).
Pick a Value	Lists the values applicable to the selected question/rescale combination. Dates and numbers without a rescale will list the actual data. Written answers and patterns give you the option of displaying the whole Answers or extracting Keywords to fill the value list. Form Selects can be True or False.

Protect Answers

Accessed from the Edit menu.

Use this dialog to protect responses from accidental change. If you're interested in restricting access to editing, use the administrative passwords in the Options dialog (see page 23).



Forms already verified	Verification is a KeyCollect option where two different people enter forms to confirm accuracy, so this may not apply to your project. See <i>Double Entry with Verify</i> on page 11.
Prior session's forms	Sessions start with the launching of KeyCollect, and end when you exit.

- Other people's forms** KeyCollect prompts you for an ID when you launch the program. This ID is embedded in forms.
- Warn before saving changes** Pops up a confirmation warning when you leave a form which has been changed.

Print with Data

Accessed from the File menu in Answer Entry.

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

The primary control in the dialog is your ability to select a range of forms—see *Form Select Filters* on page 25 for details on their construction.

Print With Data

For these forms

All 709 Forms in Database

From Form 1 to 50 inclusive

Selected by: All Forms

Page Numbers

Re-number within each report document Cumulative through this print job

Text style for written answers

T2: Scale

Show these question's answers

Questions	Show
Q1: Login Assigned Resume ID	<input checked="" type="checkbox"/>
Q2: Home	<input checked="" type="checkbox"/>
Q3: Office	<input checked="" type="checkbox"/>
Q4: Commute impact residence	<input checked="" type="checkbox"/>
Q5: Commute length	<input checked="" type="checkbox"/>
Q6: Telecommute	<input checked="" type="checkbox"/>
Q7: Telecommuting schedule	<input checked="" type="checkbox"/>
Q8: Company telecommuting policy	<input checked="" type="checkbox"/>
Q9: Company subsidize telecommuters	<input checked="" type="checkbox"/>
Q10: Reasons not telecommuting	<input checked="" type="checkbox"/>

Sort on: By form number

Buttons: OK, Cancel, Help, Show All, Show None

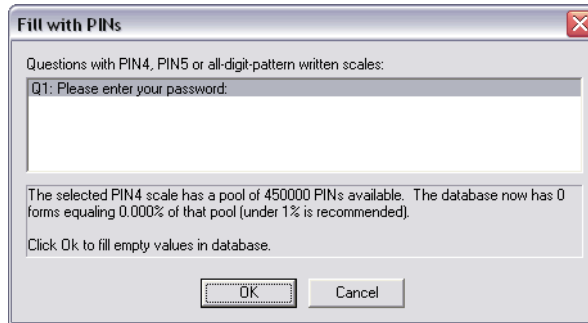
Fill Passwords

Accessed from the Database menu.

This is a great utility for seeding a database with passwords. Just import your respondent contact information, adding a couple extras just in case. Make sure you have a question with a KeyCollect 4, 5, or all number PIN

scale. Then go to Answer Entry, Database Menu, and click Fill Passwords. KeyCollect will add passwords to any forms which don't already have them, checking to make sure the values are unique.

PIN files can also be generated from SurveyPro.



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