# **Survey Solutions**

Questionnaire Designer-User's Guide

Computational Tools, Development Research Group

# ABSTRACT

Survey Solutions is a tool developed to improve survey data collection. Survey Solutions enables: 1) better communication between the enumerators and supervisors, 2) more reliable statistics due to checks performed during the interview and 3) more up to date statistics due to a reduced time lag between data collection and data analysis. This guide will help you to create your questionnaire using the Questionnaire Designer tool.



THE WORLD BANK GROUP

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## 1. Getting started

#### **1.1 Registration and signing in**

To start developing a questionnaire, open your web browser<sup>1</sup> and connect to the address *http://solutions.worldbank.org/.* 

If you have not used the software before, you need to register with a new user account. Click on the *Register* link, choose your username and password and wait for a confirmation email to arrive in your inbox. Click on the link from the email to activate your account and sign into the system using the username and password that you had just defined.

WORLD BANK GROUP		HELP REGISTER LOG IN
0	Welcome to Survey Solutions Questionnaire Designer	
Survey Solutions	Please log in or Register	
Designer	Login	
	Password	
This is a tool for creating surveys for The World Bank's CAPI platform with collaboration capabilities and export to PDF.	Stay logged in for a day	
	LOG IN FORGOT PASSWORD?	
o zon <b>The Word Bay Goog</b> A Right Inserved, Legal. Allolino, Jarrow Google Play		

#### 1.2 "My questionnaires" screen and creating a new questionnaire

The picture below shows the place where all the questionnaires, created by you or shared with you, are to be found. It is now empty, as you have just started working with the system. You can create a new questionnaire by clicking on the *Create new* tab at the top of the screen.

Question	paira Dagignar				HELP	CHANGE PASSWORD	LOGOUT
Question	naire Designer	MY QUESTIONNAIRES	PUBLIC QUESTIONNAIRE	CREATE NEW			
TITLE	$\sim$ $\times$		LAST MODIFIED	CREATED DATE	CREATED BY		
		This list does no	ot contain any records				

<sup>1</sup> Google Chrome, Internet Explorer or Mozilla Firefox

In the screen shown below, enter the name of the new questionnaire and click on the *Save changes* button.

Questionnaire Designer	MY QUESTIONNAIRES	PUBLIC QUESTIONNAIRES	CREATE NEW	HELP	CHANGE PASSWORD	LOGOUT
Create New Questionnaire						
Questionnaire Title						
Is Public						
CREATE CANCEL BACK TO LIST						

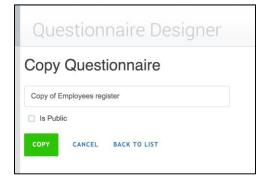
#### 1.3 Copying a questionnaire

You can copy questionnaires that have been shared with you.

- Click on the *Action* menu to the right of the questionnaire you would like to work on.
- **2.** Select *copy* from the menu.
- **3.** Enter the name for the copied questionnaire and click *copy*.

The questionnaire will now be listed on the *My questionnaires* screen.

Questionnaire Designer				HELP	CHANGE PASSWORD	LOGOUT
	MY QUESTIONNAIRES	PUBLIC QUESTIONNAIRES	CREATE NEW			
		LAST MODIFIED	CREATED DATE	CREATED BY		
Survey Solutions Simple Questionnaire		28 Jan 2016, 17:36	28 Jan 2016, 17:36	you		ACTION +
Roster Function Demo 2		10 Nov 2015, 08:32	31 Aug 2015, 10:04	mwulfe		ACTION +
Function Tester		25 Aug 2015, 14:22	23 Aug 2015, 11:32	mwulfe		ACTION +
Copy of Uganda_MAPS_Crop_Cut		28 Jul 2015, 15:48	29 Jun 2015, 10:15	gourlay		ACTION +
Cascading Questions Tutorial		20 Jul 2015, 12:32	16 Jul 2015, 08:19	shimagm		ACTION +
Employees register		1 Jul 2015, 13:40	1 Jul 2015, 13:39	you		ACTION +
Uganda_Post Harvest		29 May 2015, 10:40	29 May 2015, 10:40	you	Open Copy	
Uganda_Post Planting		29 May 2015, 10:39	29 May 2015, 10:39	you	Export as	PDF
Zambia LCMS		29 May 2015, 10:37	29 May 2015, 10:37	you	Delete	
SAINT LUCIA Labour Force Survey Questionnaire		29 May 2015, 10:36	29 May 2015, 10:36	you		ACTION +
SA Edge Survey		29 May 2015, 10:34	29 May 2015, 10:34	you		ACTION +
WB Enterprise Survey		29 May 2015, 10:34	29 May 2015, 10:34	уои		ACTION +
Test		28 May 2015, 12:58	28 May 2015, 10:24	llon		ACTION +



## 2. Designer Interface

#### 2.1 Edit questionnaire

To start editing a questionnaire,

#### Method 1

- **1.** Click on the *My questionnaires* tab.
- 2. Click on the questionnaire's name to display the editor screen.

#### Method 2

- 1. Click on the Action button, located on the right hand side of the questionnaire's name
- 2. Select *Open* from the menu to display the editor screen.

			HELP	CHANGE PASSWORD	LOGOUT
Questionnaire Designer	PUBLIC QUESTIONNAIRES	CREATE NEW			
TITLE Q X	LAST MODIFIED	CREATED DATE	CREATED BY		
Survey Solutions Simple Questionnaire	28 Jan 2016, 17:36	28 Jan 2016, 17:36	you		ACTION -
Roster Function Demo 2	10 Nov 2015, 08:32	31 Aug 2015, 10:04	mwulfe		ACTION -
Function Tester	25 Aug 2015, 14:22	23 Aug 2015, 11:32	mwulfe		ACTION -
Copy of Uganda_MAPS_Crop_Cut	28 Jul 2015, 15:48	29 Jun 2015, 10:15	gourlay		ACTION -
Cascading Questions Tutorial	20 Jul 2015, 12:32	16 Jul 2015, 08:19	shimagm		ACTION -
Employees register	1 Jul 2015, 13:40	1 Jul 2015, 13:39	you		ACTION -
Uganda_Post Harvest	29 May 2015, 10:40	29 May 2015, 10:40	you	Open Copy	
Uganda_Post Planting	29 May 2015, 10:39	29 May 2015, 10:39	you	Export as	PDF
Zambia LCMS	29 May 2015, 10:37	29 May 2015, 10:37	you	Delete	
SAINT LUCIA Labour Force Survey Questionnaire	29 May 2015, 10:36	29 May 2015, 10:36	you		ACTION -
SA Edge Survey	29 May 2015, 10:34	29 May 2015, 10:34	you		ACTION -
WB Enterprise Survey	29 May 2015, 10:34	29 May 2015, 10:34	you		ACTION -
Test	28 May 2015, 12:58	28 May 2015, 10:24	you		ACTION +

#### 2.2 Update settings

To update the settings of the questionnaire, click on the *Settings* button located at the top right of the page.

• •	Designer ×		<u>*</u>						
$\leftarrow$ -	🗲 🔿 C 🔮 World Bank Group [US] https://solutions.worldbank.org/UpdatedDesigner/app/#/d3a952b54e774cb48b90ad20d24f03f2/chapter/8e03ccf9e0f14b77d7cf43795c055 Q 🏠 🚍								
D	Employees register. (31Q, 8G, 9R) compile		This document is private HISTORY SETTINGS LOG OUT						
$\equiv$	Enterprise details	Q	Title						
	$\stackrel{\scriptscriptstyle {\rm T}}{=\!\!=}$ All information collected in this questionnaire is confidential and	will be used for st	Enterprise details						
	©= Region	region							
	AB Address	address							
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT								

- **A.** Update the questionnaire name in the *Questionnaire name* text box.
- B. Share the questionnaire with more than one person to work on or only view the questionnaire at the same time. To do this, use the individual's email that has been registered with Questionnaire Designer (<u>http://solutions.worldbank.org/</u>.)
  - **1.** Type the individual's registered email in the *Invite collaborators by e-mail* text box.
  - **2.** Click on the *edit* link.
  - **3.** Either select *View* to allow read only privileges or *Edit* to allow the user to edit the questionnaire.

Invite collaborators by e-mail:	View	
Synoraminente workaduratory JUNIER	Edit	
sgholamimeh@worldbank.org - owner		
Who has access:		
Employees register	L L	IPDATE
Questionnaire name:		
Questionnaire settings		×

#### 2.3 Recent changes to the questionnaire

To see a list of recent changes made to the questionnaire, click on the *History* button located at the top right of the page. This page will list the question that was changed along with the username of the person who made the change, and the time stamp for when the change occurred.

• •	Designer x										
← -	🗲 🧼 C 🧕 World Bank Group [US] https://solutions.worldbank.org/UpdatedDesigner/app/#/d3a952b54e774cb48b90ad20d24f03f2/chapter/8e03ccf9e0f14b77d7cf43795c055 Q 🏠 🚍										
D	Employees register. (31Q, 8G, 9R) COMPILE		This document is private HISTORY SETTINGS LOG OUT								
$\equiv$	Enterprise details	Q	_ Title								
	$\stackrel{\tau=}{=}$ All information collected in this questionnaire is confidential and will	be used for st	Enterprise details								
	S= Region	region									
	AB Address	address									
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT										

Ousigner      Designer      Designer			•		
C G World Bank Group [US] https://solutions.worldbank.org/questionnaire/questionnaire/history/67eaab38e2fb48f69d72246d45a66387			ର ☆ ≣		
Questionnaire Designer AV questionnaires Public questionnaires CREATE NEW					
EDIT Copy of Employees register.					
CHANGE	USERNA	ME T	TIMESTAMP		
Questionnaire "Copy of Employees register." cloned from questionnaire "Copy of Employees register" shimagm 6/23/2015 PM					

### **3. Sections**

Any questionnaire created with this designer tool consists of sections.

Any questionnaire must have at least one section. Every section can in turn contain one or more:

- **Static-text**: sentence address to someone to deliver some information.
- **Question**: sentence (usually in interrogative form) address to someone to get specific information in reply.
- Sub-section: group of questions asked only once during the interview. For instance, it can be used to collect information on households' characteristics. Subsections can be nested<sup>3</sup>.
   Roster: group of questions asked several times during the interviews. For instance, it can be used to collect information on households' members. Rosters can be nested<sup>4</sup>.

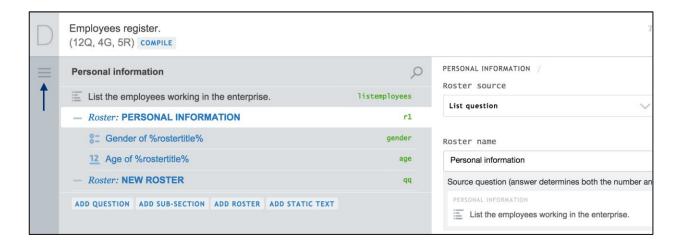
	In the designer tool		On the tablet
Employees register. (12Q, 4G, 5R) COMPLE SECTIONS: Personal information Education Work experience Languages ADD NEW SECTION	In the designer tool	Vith the director and then continue with the ne nterprise. Tisteeployees N rl gender age qq	Con the tablet     Image: Constraint of the second information - Ann     Personal information - Paul   Personal information - Mary   Personal information - Andrew   Personal information - Andrew   Personal information - Martin
		SAVE CANCEL	New roster - Title       +     Education       +     Work experience       +     Foreign Languages       Working conditions       Complete

<sup>&</sup>lt;sup>3</sup> A subsection can contain another subsection inside.

<sup>&</sup>lt;sup>4</sup> A roster can contain another roster inside.

#### **3.1 Create sections**

**1.** Click on the button located at the top left of the screen. A new panel showing all the sections within the questionnaire will display.



2. Click on the *Add new Section* button to add a new section.

Employees register. (12Q, 4G, 5R) COMPILE		
	<	Q
Personal information	nterprise.	listemployees
Education	N	r1 gender
Work experience		age
Languages		qq
	ROSTER ADD STATIC T	EXT

#### On a tablet

Sections are displayed on the tablet as follows:

All sections are listed on the left hand panel and you can navigate through the questionnaire by clicking on the sections' names.

□ 🕰 🛛	⊒ ◘ ⊠ ± ± ±	* 💐 🛜 83%	2:04 PM
Emp	loyees register		:
	Enterprise details		
-	Personal information		
	Personal information - Ann		
	Personal information - Paul		
	Personal information - Mary		
	Personal information - Andrew		
	Personal information - Martin		
	New roster - Title		
+	Education		
+	Work experience		
+	Foreign Languages		
	Working conditions		
	Complete		

#### **3.2 Selecting sections**

To select a section

- 1. Click on the button located at the top left of the screen. Doing so will display the panel containing the different sections.
- 2. Click on the section you would like to work with.

(12Q, 5G, 5R) COMPILE		
SECTIONS:	<	
Personal information	nterprise.	listemployees
Education	N	rJ
	,	gender
Work experience		age
Languages		qc
Working Conditions	ROSTER ADD STATIC	TEXT
Working Conditions		

Once you select a section you can add, copy, move or delete questions, sub-sections, rosters and static-texts. In the right hand panel, you can add or modify section properties.

$\square$	Employees register (31Q, 8G, 8R) COMPILE		This document is <b>private HISTORY</b>	SETTINGS LOG OUT
$\equiv$	Foreign Languages	Q	Title	
\$m	- Roster: LANGUAGES	r4	Foreign Languages	
	Compare the second seco	foreign •whichlang	•Enabling condition(?)	
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEX	T PASTE		
			SAVE CANCEL	DELETE

#### **3.3 Defining section properties**

To define the characteristics of a section, select the section to add or modify its properties in the right hand panel.

#### 3.3.1 Title

The *Title* box contains the title of the section. Here, you may also use text substitution to reference questions and user-defined or system-defined variables. To do this, enclose the question or variable name with the percentage sign (%)

Title	
Information about the Enterprise	
• Enabling condition (?)	

#### 3.3.2 Enabling condition

*Enabling condition* works in the same way as it does for questions (See 4.3.6 Enabling Condition). However, the enabling condition added to a section is applicable to every question, roster and subsection within that section.

For example consider the categorical single-select question "Region" where: code 1 is "Region1", code 2 is "Region2", code 3 is "Region3" and code 4 is "Region4". Then, there is the section "Information about the Enterprise" having questions, sub-sections of questions and rosters that we would like to ask only to

the enterprises located in "Region1" or "Region2". To accomplish this, we add the following enabling condition: "region.InList(1,2)" to the section "Information about the Enterprise". By doing this, the questions, sub-sections and rosters within this section will be enabled only if the answer to the question "Region" is "Region1" or "Region2" (codes 1 and 2 respectively).

To hide the section if it is disabled, select the *Hide if disabled* check box. This option is not available for the first section in a questionnaire.

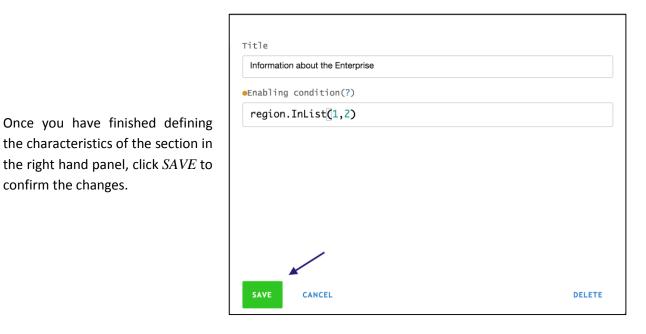
🗌 Hide if disabled

In the designer - "R	egion"	In the designer - "Information about the Enterprise"
Question type       0=     Categorical: Single-select       Variable label(?)	Variable name(?)	
uestion text Region		
1 Region1	×	Title
2 Region2 3 Region3	× ×	Information about the Enterprise     Enabling condition (?)
4 Region4		region.InList(1,2)
Combo box Is linked	Cascading combo box	
ADD INTERVIEWER INSTRUCTION		
SAVE CANCEL DELE	TE CLONE MOVE TO	
the tablet - When the answ Region3" or "Regi		the objects within the section are disabled.

	□ □ ▲ □ □ ± ± ± Employees register	\$¥\$\$ कि 82%∎ 2:07 PM
	Enterprise details + Personal information	
Region	+ Education	
	+ Work experience	
O Region1	+ Foreign Languages	
O Region2	Working conditions	
Region3	Complete	
O Region4		

On the tablet - When the answer to "Region" is "Region1" or "Region2",	the objects within the section are enabled.			
	□ • • • • • • • • • • • • • • • • • • •			
	Employees register			
Region	Enterprise details			
Region1	+ Personal information			
O Region2	+ Education			
O Region3	+ Work experience			
O Region4	+ Foreign Languages			
	Working conditions			
	+ Information about the Enterprise			
	Complete			

### 3.4 Saving sections



**3.5 Copying sections** 

confirm the changes.

There are two ways to copy and paste a section from another questionnaire or from within a questionnaire you are currently working on.

#### 3.5.1 First Method

To copy and paste a section,

1. Click on the navigation button on the left hand panel.

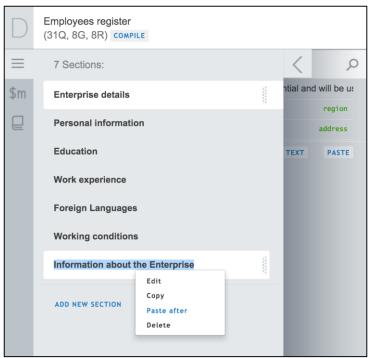
$\square$	Employees register (31Q, 8G, 8R) COMPILE	
$\equiv$	Enterprise details	Q
\$m	E All information collected in this questionnaire is confidential and will be used for	statistical purr
40111	e= Region	region
	AB Address	address
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT	PASTE

2. Right click on the section that you want to copy and select *COPY*.

D	Employees register (31Q, 8G, 8R) COMPILE		
$\equiv$	7 Sections:	<	Q
\$m	Enterprise details         Personal info         Copy         Paste after         Delete         Work experience         Foreign Languages         Working conditions         Information about the Enterprise	TEXT	d will be us region address PASTE

(If you want to past the section in another questionnaire, open that questionnaire in Designer.)

**3.** In the navigation menu on the left hand panel, right click on the section that should precede the section you have copied.



4. Click PASTE AFTER.

#### 3.5.2 Second Method

To copy and paste a section,

- **1.** Click on the navigation button on the left hand panel.
- 2. Right click on the section that you want to copy, and select *COPY*.

D	Employees register (31Q, 8G, 8R) COMPILE	
$\equiv$	7 Sections:	< 2
\$m	Edit Copy Paste after Delete Work experience Foreign Languages Working conditions Information about the Enterprise	ntial and will be us region address TEXT PASTE
	ADD NEW SECTION	

(If you want to past the section in another questionnaire, open that questionnaire in Designer.)

- **1.** In the navigation menu on the left hand panel, open the section where you want to copy the section in.
- 2. Click *PASTE* on the bottom right side of the section navigation pane.

$\square$	Employees register (31Q, 8G, 8R) COMPILE OK, saved at 11:21				
$\equiv$	Work experience				
\$m	- Roster: WORK EXPERIENCE r3				
	12         How many jobs have you had excluding the current job         numjob				
	- Have you ever worked more than 10 years in the same job?				
	AB Name of your current supervisor name_sp				
	12   What is %name_sp%'s phone number?   phone				
	C What is %rostertitle% current occupation?				
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT				

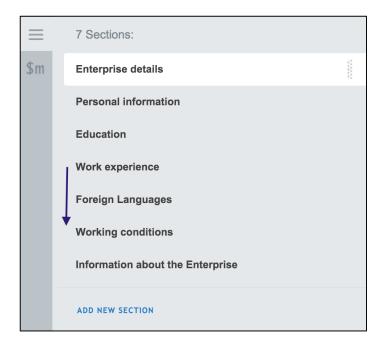
#### Note the following:

- Copying sections from a different questionnaire doesn't necessarily create a valid questionnaire. The copied questions may refer to the variables that don't exist in the new questionnaire or contain variable names already utilized elsewhere in the new questionnaire. These inconsistencies must be resolved with manual edits.
- Copying and pasting must be done with the same browser. One can't copy and paste to a different browser or any other program.

#### 3.6 Moving sections

To move a section,

- 1. Click on the button located at the top left of the screen. Doing so will display the panel containing the different sections.
- 2. Now, move your mouse over the left hand side of the section you would like to move and click.



**3.** Drag the section and release it in its new location.

$\equiv$	7 Sections:	$\equiv$	7 Sections:
\$m	Enterprise details	\$m	Enterprise details
	Personal information		Personal information
	Work experience		Education
	Education		Foreign Languages
	Foreign Languages		Work experience
	Working conditions		4
	Information about the Enterprise		Working conditions
	information about the Enterprise		Information about the Enterprise
	ADD NEW SECTION	-	
			ADD NEW SECTION

### **3.7 Deleting sections**

There are two methods for deleting a section.

#### 3.7.1 First method

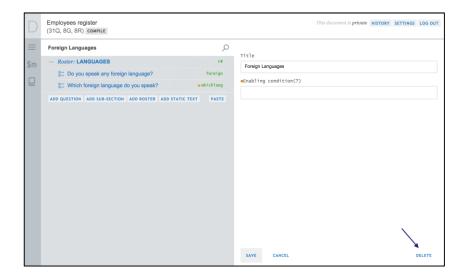
**1.** Click on the button located at the top left of the screen. Doing so will display the panel containing the different sections.

- 2. Right click on the section you would like to delete.
- **3.** In the pop-up menu click on the *DELETE* link.

$\square$	Employees register (31Q, 8G, 8R) COMPILE	
$\equiv$	7 Sections:	< >
\$m	Enterprise details	r4 foreign
	Personal information	• whichlang
	Education	TEXT PASTE
	Work experience	
	Foreign Languages	
	Edit Working cond Copy	
	Information ab Delete	

#### 3.7.2 Second method

- 1. Select the section you would like to delete
- **2.** Click on the *DELETE* link in the right hand panel.



### 4. Questions

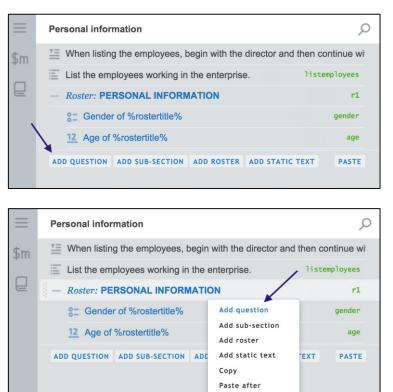
#### 4.1 Adding questions

You can add a question at the section level (not included in any sub-section or roster), within subsections or rosters, or after any question in the questionnaire.

To add a question at the section level, click on the *Add Question* button located on the left hand panel. These questions are created in black. See the example of "List the employees working in the enterprise".

To add a question within a specific subsection or roster, right click on the group. Then, in the pop-up menu bar displayed click on *Add Question*.

To add a question after a specific question, right click on the question. Then, in the pop-up menu bar displayed click on *Add Question After*.





Delete

### 4.2 Selecting questions

In the left hand panel, click on the question you would like to work with.

=	Personal information	Q
	List the employees working in the enterprise.	listemployees
	- Roster: PERSONAL INFORMATION	r1
	8- Gender	gender
	12 Age	age
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT	

Once you select a question, you can add or modify the question's properties in the right hand panel.

D	Employees register (31Q, 8G, 8R) COMPILE		This document is private HISTORY SETTINGS LOG O	UT
≡ \$m Q	Personal information	ontinue wi employees r1 gender age PASTE	PERSONAL INFORMATION / PERSONAL INFORMATION / Question type variable name(?) ©= Categorical: Single-select v g gender Variable label(?) Gender of the employee Question text Gender of %rostertitle% 1 Male × 2 Female × ADD OPTION SHOW STRINGS I IS Combo Cascading combo box linked box ADD INTERVIEWER INSTRUCTION eEnabling condition(?)	
			SAVE CANCEL DELETE MOVE TO	•

#### **4.3 Defining question properties**

When you select a question, you can see its details on the right hand panel. Questions are defined by a set of properties. Some features are common to almost all question types, and others are defined for a specific question type.

#### 4.3.1 Variable name

The *variable name* is the unique identifier of a question, which is useful when exporting the data for analysis. It has to start with a letter, but can also contain numbers and the underscore symbol. As it is not needed during the interview, the variable name is not visible on the tablet.

$\equiv$	Personal information	Q	PERSONAL INFORMATION / PERSONAL INFORMATION / Question type Variable name(?)
	List the employees working in the enterprise.	listemployees	@=     Categorical: Single-select     gender
	- Roster: PERSONAL INFORMATION	r1	
	8 Gender	gender	Varjable Tabel(?)
	<u>12</u> Age	age	Gender of the employee

#### 4.3.2 Label

The *variable label* is the description of the data captured by the question and it will be associated to the variable name when exporting the data to a statistical software package. If the variable label is not entered, the system automatically exports the question text as its label. As it is not needed during the interview, the variable label is not visible on the tablet.

Quest	tion type		<pre>Variable name(?)</pre>
0-	Categorical: Single-select	$\sim$	gender
Varia	able label(?)		
Gen	ider of the employee		
Quest	tion text		
Gen	der of %rostertitle%		

#### 4.3.3 Question text

The *Question text* box contains the text that the enumerator will read to the interviewee. Therefore, it is suggested to use regular language when defining the text. For instance, *"How many people live in your household?"* instead of *"People living in the HH"*.

The text of the question can be interactive; this means that it can change according to answers given in previous questions. There are two methods for applying this feature.

#### 4.3.2.1 First method

Use an answer given in any previous question in another question's text. To do this, include in the question's text the variable name of a previous question within percentage symbols.

	Dynamic title i	n the designer
Information about the Enterprise         AB       Name of the enterprise where you work         12       How many employees does %enterprise?         12       How many days a week %enterprise?         12       How many days a week %enterprise?         12       How many partners does %enterprise?         12       How many partners does %enterprise?         12       How many partners does %enterprise?         13       How many partners does %enterprise?         14       Name of %enterprise?	open to the public? daysopen	INFORMATION ABOUT THE ENTERPRISE / Question type Variable name(?) 12 Numeric Ø num_employee Variable label(?) Question text How many employees does %enterprise% have?
	Dynamic title Name of the enterprise wher Business Solutions	
	How many employees does B	Business Solutions have?

#### 4.3.2.2 Second method

Use an answer given to a previous question that triggers a roster in the *question text*. To do this, include "rostertitle" within percentage symbols in the question text.

Dynamic title in the designer					
Personal information	Q	PERSONAL INFORMATION / PERSONAL INFORMATION / Question type Variable na			
List the employees working in the enterprise.	listemployees	12 Numeric V 🖉 age			
- Roster: PERSONAL INFORMATION	r1	<pre>variable label(?)</pre>			
SE Gender of %rostertitle%	gender				
12 Age of %rostertitle%	age	Question text			
ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT		Age of %rostertitle%			
Dynamic title on the tablet					

nn	×	
aul	×	Age of Ann
lary	×	× Tap to enter number
ndrew	×	
lartin	×	

#### 4.3.4 Type

The expected answer type determines the *question type* <sup>5</sup> to use.

Expected answer	Question type
Select one answer from a list of possible answers	Categorical: Single-select
Select more than one answer from a list of possible answers	Categorical: Multi-select
A number (integer or decimal)	Numeric
A date	Date
A text	Text
A GPS coordinate	GPS
A list of answers	List
Capture a barcode	Barcode
Capture a binary file e.g. photo	Picture

To define the question type,

**1.** Click on the *question type* dropdown box.

Question Type	
AB Text	

<sup>&</sup>lt;sup>5</sup> For a detail description of the different types of question refer to: "A guide to different question types" that can be found at http://web.worldbank.org/WBSITE/EXTERNAL/EXTDEC/EXTRESEARCH/EXTPROGRAMS/EXTCOMPTOOLS/0,,contentMDK:23568 084~pagePK:64168176~piPK:64168140~theSitePK:8213597,00.html

Question type				
<u>AB</u>	Text 🗸			
0-	Categorical: Single-select			
82	Categorical: Multi-select			
12	Numeric			
$\odot$	Date			
AB	Text			
0	GPS			
Ξ	List			
0:0	Barcode			
Ō	Picture			

## 4.3.5 Instructions

2. From the pop-up menu select the question type by clicking on it.

For each question, you can add instructions to be read by the enumerator while performing the interview.

In the designer					
To add an instruction first click on the <i>Add</i> Interviewer instructions link.	Then, add the text in the field.				
Question type	Question type				
Variable label(?) Question text	<pre>variable label(?) Question text</pre>				
List the employees working in the enterprise. Maximum number of list elements	List the employees working in the enterprise. Maximum number of list elements				
ADD INTERVIEWER INSTRUCTION	Instruction (?) Do not list people with an internship agreement				

On the tablet				
	The instructions will be shown in blue on the tablet.			
	List the employees working in the enterprise.			
	INSTRUCTION Do not list people with an internship agreement			
	Tap to enter new item			

The instructions specified can also be hidden until the interviewer clicks on Instruction link to reveal the text. To do this, check the *Hide instruction* check box.

Instruction (?) 🗹 Hide instruction		
Do not list people with an internship agreement.		

#### 4.3.6 Enabling condition

*Enabling conditions* are the Survey Solutions equivalents of skip patterns in paper-based questionnaires. By using conditions you can enable or disable certain questions based on the answers an interviewee has given in previous questions. For this reason, at least two questions are involved, let's call them: the unleash question and the recipient question.

For example, if the template has the questions "Do you speak any foreign language?" and "Which foreign language do you speak?"

Foreign Languages	Q
- Roster: LANGUAGES	R4
Do you speak any foreign language?	foreign
8- Which foreign language do you speak?	whichlang

it does not make sense to ask the second question if the interviewee does not speak a foreign language. Therefore, in this example the first question is the unleash one and the second is the recipient one. If the answer to the unleash question is "Yes", the recipient question is enabled. On the contrary if the answer is "No", the recipient question remains disabled.

Conditions are written in C# programming language, which is very easy to learn. You simply have to connect a variable name<sup>6</sup> with values or another variable name using logical operators.

For this example, the unleash question is a *categorical: Single-select* question with variable name *foreign* and possible answers: 1-"*Yes*" and 2-"*No*"

$\equiv$	Languages	Q	LANGUAGES / LANGUAGES / Question type Variable name(?)
	- Roster: LANGUAGES	r4	Question type     variable name(?)       Q=     Categorical: Single-select     Ø foreign
	O you speak any foreign language?	foreign	
	8= Which foreign language do you speak?	whichlang	Variable label(?)
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT		Question text Do you speak any foreign language?
			1 Yes X
			2 No X
			ADD OPTION SHOW STRINGS

Write the logical expression in the *Enabling condition* text field of the recipient question. The text box autosuggests roster names and variable names as you type syntax conditions and helps avoid confusion with numerous standard C# keywords.

Validation condition	
date_married	keyword
date_born	keyword

The question will appear greyed out if it is disabled. To hide the recipient question if it is disabled, select the *Hide if disabled* check box.

🗆 Hide if disabled
--------------------

In the example the condition expression to enable the recipient question is: foreign== 1

<sup>&</sup>lt;sup>6</sup> Defined in the *Variable* field

$\square$	Employees register (32Q, 8S, 8R) COMPILE			This document is private	HISTORY SETTINGS LOG OUT			
$\equiv$	Foreign Languages	Q	uestion text					
\$m	- Roster: LANGUAGES	r4 foreign	Which foreign language do you speak?					
	Do you speak any foreign language?							
	Operation of the second sec	<ul> <li>whichlang</li> </ul>	1 English		×			
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT	PASTO	2 Spanish		×			
			3 French		×			
			4 Arabic		$\times$			
			5 Chinese		$\times$			
			6 Other		$\times$			
			ADD OPTION Cascading combo bo	x 🗌 Combo box	SHOW STRINGS			
			ADD INTERVIEWER INSTRUCTIOn Enabling condition (?)					
			foreign <del>==</del> 1					
			ADD NEW VALIDATION RULE					
				Quest	tion scope Interviewer 🗸			
			SAVE CANCEL		DELETE MOVE TO .			

How does this example look on the tablet?			
□	다 🖬 🛦 🖬 🖬 🛓 🛓 🔹 🗱 💲 82% 🖀 2:11 PM. Foreign Languages /		
Languages - Ann	E Languages - Ann :     Do you speak any foreign language?		
Section not started	Yes     No		
Languages - Paul Section not started			
Languages - Mary	Which foreign language do you speak?		
Section not started	Spanish     French		
Section not started	Arabic     Chinese		
Languages - Martin Section not started	• Other		
Next section	To parent		

In the tables below you can find a list of logical operators and functions corresponding with specific question types and some examples that you can use in condition expressions.

Logical operator	Description	Type of questions
>	Greater than	Numeric and Categorical: Single- select
<	Less than	Numeric and Categorical: Single- select
==	Equal to	Text, Numeric and Categorical: Single- select
!=	Not equal to	Text, Numeric and Categorical: Single- select
<=	Less than or equal to	Numeric and Categorical: Single- select
>=	Greater than or equal to	Numeric and Categorical: Single- select
variableName.InList(x,y)	Is within a list of options (x or y)	Categorical: Single- select
variableName.ContainsAny(x,y)	Contains x, or y, or both	Categorical: Multi- select
variableName.Contains(x)	Equal to x	Categorical: Multi- select

Function	Description	Type of questions
variableName.InList(x,y)	Is within a list of options (x or y)	Categorical: Single-select
variableName.ContainsAny(x,y)	Contains x, or y, or both	Categorical: Multi-select
variableName.Contains(x)	Equal to x	Categorical: Multi-select
variableName.Yes.Contains(x,y)	Items X and Y are marked "yes"	Categorical: Multi-select in Yes/No mode

Many functions are available, such as calculating body mass index (BMI), checking if a value is between two specified values, and so on. For a complete list of functions, refer to the <u>Functions Index</u> document.<sup>7</sup>

<sup>&</sup>lt;sup>7</sup> For a list of available functions refer to: "Survey Solutions: Functions Index" that can be found at http://siteresources.worldbank.org/INTCOMPTOOLS/Resources/8213623-1380598436379/func\_index.pdf.

Unleash questions	Categories in unleash questions	Recipient question	Condition expression in recipient question
How many children does %name% have? <i>Variable name: children</i>		How many of them are males?	children>0
At what age has %name% started working? <i>Variable name:</i> startwork		What is the reason for which %name% started working?	startwork<12
Gender of %name% Variable name: gender	1. Male, 2. Female	Has %name% ever been pregnant?	gender==2
Short description of %name%'s primary occupation. (if unemployed write: none) Variable name: occupation		What is %name% total income?	occupation!="none"
Age of %name% Variable name: age		What is %name%'s height?	age<=2
Age of %name% Variable name: age		Has %name% ever been employed?	age>=12
What is %name%'s marital status? <i>Variable name:</i> maritalstatus	<ol> <li>Single</li> <li>Married</li> <li>Divorced</li> <li>Widow/er</li> </ol>	Does %name% receive a pension from their former partner?	maritalstatus.InList(3,4)
Select the cereals cultivated in your land. Variable name: cereals	<ol> <li>Rice</li> <li>Maize</li> <li>Wheat</li> <li>Barley</li> <li>Other</li> </ol>	How many tones of Wheat do you produce yearly?	cereals.Contains(3)

You can connect different conditions by using the symbols "&&" and "||", for the logical operators *and* and Or, respectively. For example:

```
age < 18 || age > 65
age > 18 && employed == 1
```

Also conditions can be grouped using parenthesis. For example:

(age < 18 || age > 65) && employed == 1

Expressions can also include references to specific rows within rosters by using the system-generated variables displayed in the table below. It is advisable to refrain from using @rowindex, due to the dynamic nature of rosters.

System generated variables	Description
@rowcode	Row code
@rowname	Row title
@rowindex	System generated code
Ørester	Alias for the roster variable name from the
@roster	perspective of the current cell

Expressions can also include any one of the 70 Math functions to perform mathematical transformations. For example, functions like Math.Round(), Math.Floor(), Math.Ceiling() can be used for rounding fractions to integer values, Math.Abs() can be used to obtain an absolute value, etc. The full description of the Math library functions is available from Microsoft at the following address: https://msdn.microsoft.com/en-us/library/system.math(v=vs.110).aspx .

#### 4.3.7 Validation condition

*Validation conditions* are created similarly to enabling conditions. Instead of evaluating whether the question has to be displayed, it determines whether the answer given by the interviewee is acceptable. You can have up to 10 validation conditions for each question.

For instance, consider the question "How many employees does %enterprise% have?" with *variable* name "*num\_employee*". If the value 0 is not an acceptable answer, the validation condition to prevent this answer would be:

num\_employee > 0

or equivalently (using special variable *self*, which denotes the value of the answer being validated):

self > 0

To add a validation condition,

- 1. Click on the Add New Validation Rule link.
- 2. Write the logical expression in the *Validation condition* field.

INFORMATION ABOUT THE ENTERPRISE	
Question type	Variable name(?)
12 Numeric V	mum_employee
Variable label(?)	
Question text	
How many employees does %enterprise% have?	
🕑 Integer	
ADD INTERVIEWER INSTRUCTION	
• Enabling condition (?) 🔲 Hide if disabled	
• Validation condition 1 (7	*
num_employee > 0	
Error message (?) The enterprise has to have at least one employee	
ADD NEW VALIDATION RULE	
	Question scope Interviewer 🗸
SAVE CANCEL	DELETE MOVE TO +

#### 4.3.8 Error message

The *Error message* is the text that will be displayed on the tablet when the answer to the question is not validated by that *validation condition*.

To add an error message, write the text of the message in the *error message* field. You may also use text substitution to reference questions and user-defined or system-defined variables. To do this, enclose the question or variable name with the percentage sign (%)

How many employees does %enterprise% have?
ADD INTERVIEWER INSTRUCTION
Enabling condition (?) 🔲 Hide if disabled
•Validation condition 1 (?)
num_employee > 0
Error message (?)
The enterprise has to have at least one employee
ADD NEW VALIDATION RULE

How the error message is displayed on the tablet.

How many employees does Business Solutions have?

0 ANSWER IS INVALID The enterprise has to have at least one employee

#### 4.3.9 Locate questions with enabling or validation conditions

IN	D	
-	Roster: HOUSEHOLD MEMBERS	householdmembers
	AB What is the name of the person?	persname
	8= What is %persname%'s sex?	sex
	12 What is %persname%'s age?	• age
	S= Does %persname% currently attends any school?	e attsch
	S= Which school type does %persname% attend?	• schtype
	8= Has %persname% worked last week?	• worked
0-	Head	head1
-	Roster: ADULTS	• adults
	S= Is %rostertitle% married?	married
8-	mcq	mcq

Questions that have enabling or validation conditions attached to them are marked with colored dots to indicate this visually:

An orange dot indicates the presence of the enabling condition and a blue dot indicates presence of the validation condition. Both can be present at the same time.

#### 4.3.10 Question scope

The scope of the question defines who will be responsible for answering it. The scopes are: prefilled, hidden, enumerator and supervisor.

#### 4.3.10. 1 Prefilled

The role of the questions defined as prefilled includes the definition of uniqueness for the interviews and supplies 'driving directions' for the enumerators. Different types of information can be provided through these questions. Some examples are: province, household id, household address, national identification number and name of the household head.

Prefilled questions can only be text, numeric, date and categorical: Single-select questions.

To define questions as Prefilled,

**1.** Click on the *Question scope* dropdown box.

2. From the pop-up menu select *Prefilled*.

Question scope	Interviewer 🗸
	Interviewer Supervisor Hidden Prefilled
Question sco	ppe Prefilled 🗸

The behavior of questions defined as prefilled and who is responsible for answering them depend on how the questionnaire is imported from the designer tool to the headquarters<sup>8</sup> dashboard. A questionnaire can be imported in census or not census mode. In census mode, enumerators answer the prefilled questions within questionnaires and the answers can be modified before completing the interview. When not in census mode, headquarters answers the prefilled questions within questionnaires and the answers can be refilled questions within questionnaires and the answers the prefilled questions within questionnaires and the answers cannot be modified once the interview is created.

Enumerator answers prefilled questions on the tablet. Census mode.	Headquarters answers prefilled questions on the headquarters dashboard. Not census mode.	
Employees register		
Region	Take New Interview Employees register	
Region1		
O Region2	Region O Region 1	
O Region3	Region 2     Region 3	
O Region4	Region 4	
	Address T Harvard St. 2388	
Address	Responsible ana +	
3412 Pennsylvania Ave		
	Create	
START		

<sup>&</sup>lt;sup>8</sup> People who create and assign the interviews to supervisors

The enumerator sees the answers to the prefilled questions on the *Dashboard* screen within the application on the tablet.

Employees register (v1)	
REGION: Surxondaryo Region	
ADDRESS: 32 Bukhara rd	
Employees register (v1) REGION: <b>Sirdaryo Region</b>	
ADDRESS: 35 Tashket	
ADDRESS: <b>35 Tashket</b> Assigned on 11/11/2015 10:10:47 PM	

# 4.3.10.2 Supervisor

Supervisors and/or headquarters answer the questions defined as filled by supervisor once the enumerator completes the interview and sends it back to the supervisor. For this reason, these questions are not displayed on the tablet.

Filled by supervisor questions can only be *text, numeric, categorical: Single-select* and *categorical: multi-select* questions.

To define questions as filled by supervisor,

**1.** Click on the *Question scope* dropdown box.

**2.** Fom the pop-up menu select *supervisor*.

Question scope	Interviewer 🗸
	nterviewer Supervisor Hidden Prefilled
Question sco	pe Prefilled 🗸

The supervisor or headquarters answer the question in their respective dashboards.

- **1.** Select the question and click on the blue *Answer* button, which appears within the same row of the question.
- 2. In the new panel displayed at the right of the screen, enter the answer within the empty field.

**3.** Save the answer by clicking on the blue *Save answer* button.

Employees register Status: Completed Responsible: Marti	Code for the economic activity of the enterprise	
Approve Reject all F flagged (0) Commented (0) answered (3) Ainvalid	(1) / supervisor's (2) / enabled (23)	243
Enterprise details		Save answer
Region	Region 4	Comments
Address	2332 St. Paul II	Your comment
Short description of the economic activity of the enterprise	Retail sales	
Code for the economic activity of the enterprise	243 answer	
	<b>↑</b>	Add comment

## 4.3.10.3 Interviewer

When the scope *interviewer* is selected, enumerators ask the questions from the interviewee and enter their responses on the tablet. The default *Question scope* is *interviewer*.

## 4.3.10.4 Hidden

When the scope *HIDDEN* is selected, the question is destined to be hidden and store the prefilled values to be used in validations and enabling conditions. For example, one may create a validation that the highest educational attainment of a person now is no lower than it was during the last visit. At the same time, because they are hidden, they do not reveal their value to the interviewer, thus eliminating the possibility for a simple carry-over of the values from the previous wave of the survey without asking the respondent for the updated information.

Note that *Picture* and *linked questions* cannot be hidden.

To define questions as hidden,

- **1.** Click on the *Question scope* dropdown box.
- 2. From the pop-up menu select *HIDDEN*.

Question scope	Interviewer 🗸

Γ

Question s	scope	Prefilled 🗸

## 4.3.11 Defining categories

Categorical: Single-select or categorical multi-select questions are multiple-choice questions, where the interviewee can select only one or more than one answer (among the possible categories) respectively. The list of categories can be fixed or interactive. Fixed categories are defined during the design of the questionnaire. On the contrary, interactive categories are created during the interview and they depend on the answers given in a previous question.

## 4.3.11.1 One by one

This procedure is used when the list of categories is short and it involves each category being added manually one at time. To do so, first define the question type as categorical: single-select or multi-select and then click on the *Add option* link.

Question type		Variable name(?)
Categorical: Single-select	$\sim$	higedu
Variable label(?)		
Question text		
Which is the highest level of educat	tion %rostertitle% has	attained?
ADD OPTION		SHOW STRINGS
Combo box	🗆 Is linked	Cascading combo box

Each time the *add option* link is clicked; a new row with two empty fields is created to represent a category. You need to add a numeric code on the left field and the corresponding text in the right one.

Que	estion text		
N	/hich is the high	est level of education %rostertitle% has attained?	
	1	None	$\times$
	2	Primary School	$\sim$
	-		$\sim$
	ADD OPTION		

For example, in the question "What is the highest level of education %rostertitle% has attained?" the possible answers (None, Primary School, Secondary School, University and Other) are entered manually.

# 4.3.11.2 Copy and paste

This procedure is used when the list of categories are copied from an external document. To do so, first define the question type as categorical: single-select or multi-select and then click on **SHOW STRINGS** link.

Blue1		
Green2		
Red88		
Yellow72		

Paste the category titles and their corresponding codes (positive integer value) in the box. Note that the format accepted is the category title followed by one or more dots (".").

	How it looks in the d	esigner	How it looks on the tablet
Question text Which is the hig	hest level of education %rostertitie% has attain	ed?	Which is the highest level of education Ann has attained?
1	None	×	O None
2	Primary School Secondary School	×	O Primary School
4	University Other	×	<ul> <li>Secondary School</li> </ul>
ADD OPTION	Other	SHOW STRINGS	O University
Combo b	oox 🗌 Is linked	Cascading combo	O Other

# 4.3.11.3 Combo box

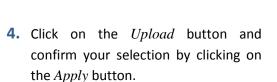
This procedure is applied when the list of categories is large. The *Combo box* feature involves uploading categories from a tab-delimited file.

The steps to apply this feature are as follows:

 Create the tab-delimited file containing the codes in the first column and the corresponding descriptions in the second column.

	А	B
1	11	Armed Forces
2	111	Legislators
3	112	Government Officials
4	114	Officials of special interest organizations
5	121	Directors and Chief Executives
6	122	Production and Operations Department Managers
7	123	Other Department Managers
8	131	General Managers/ Managing Proprietors
9	211	Physicists - Chemists and Related Professionals
10	212	Mathematicians - Statisticians and Related Professionals
11	213	Computing Professionals
12	214	Architects - Engineers and Related Professionals
13	221	Life Science Professionals
14		Health Professionals - except nursing
15	223	Nursing and midway professionals
16	231	College - University and higher education teaching professionals
17		Secondary education teaching professionals
18	233	Primary and Pre-primary education teaching professionals
19		Special Education Teaching Professionals
20		Other teaching professionals
21		Business professionals
22		Legal professionals
23		Archivists - Librarians and Related Information Professionals
24		Social Science and Related Professionals
25		Writers and creative or performing artists
26		Religious Professionals
27		Physical and Engineering Science Technicians
28		Computer Associate Professionals
31	315	Safety and Quality Inspectors
29 30 31	314	Optical and Electronic Equipment Operators Aircraft Controllers and Technicians Safety and Quality Inspectors

- **2.** Click on the *combo box*. Once the box is checked, click on the *Add options* link.
- **3.** In the pop-up window displayed click on *Choose file* and select the tab-delimited file you have prepared.





Choose File Occupation list.tab

Upload

Choose I	File No file chosen Upload
Value	Title
11	Armed Forces
111	Legislators
112	Government Officials
114	Officials of special interest organizations
121	Directors and Chief Executives
122	Production and Operations Department Managers
123	Other Department Managers
131	General Managers/ Managing Proprietors
211	Physicists - Chemists and Related Professionals
212	Mathematicians - Statisticians and Related Professionals
213	Computing Professionals
214	Architects - Engineers and Related Professionals
221	Life Science Professionals
222	Health Professionals - except nursing
223	Nursing and midway professionals
231	College - University and higher education teaching professionals
232	Secondary education teaching professionals
233	Primary and Pre-primary education teaching professionals
234	Special Education Teaching Professionals
Apply	Cancel

**5.** To update the categories click on the *reload* link.

estion	
PTIONS	Click reload to update options
s filtered	
box	

After importing the categories you can edit them by clicking on the *Upload new Options* link.

UPLOAD	NEW	OPTIONS	

On the tablet, once the enumerator starts typing letters a subset of options filtered by the entered letters is shown.

College - Univ professionals	ersity and higher education <b>t</b>	eaching
Secondary ed	lucation <b>tea</b> ching professiona	ls
Primary and P professionals	Pre-primary education <b>tea</b> chin	g
Special Educa	ation <b>Tea</b> ching Professionals	
Other teaching	g professionals	
Primary Educa Professionals	ation <b>Tea</b> ching Associate	
Pre-primary Ec Professionals	ducation <b>Tea</b> ching Associate	
tea		

# 4.3.11.4 Cascading combo box

This feature is used when the list of categories is large and where the list could be filtered by an answer given to a previous question. For instance, a national survey asks for the province, the region, and the district. Consequently, the province can filter the categories for region, and region can filter the categories for district. This can be done by defining the question responsible for filtering (parent question) and uploading the categories from a tab-delimited file.

The steps to apply this are as follows:

1. Create the tab-delimited file categories' containing the codes and descriptions in the first and second columns, respectively. The third column contains the categories' codes for the parent question.

1	Home	Layout	Tables	Chart				
_	Edit		Font					
Ê	🆣 🖕 💽 Fi	II 🔻 Cal	ibri (Body)	<b>v</b> 12				
Paste O Clear B I U								
	O35	\$ ⊗	🔘 (= f:	k l				
	Α	В	С	D				
1	1	Region1	1					
2	2	Region2	1					
	3	Region3	1					
4	4	Region4	1					
5	5	Region5	1					
6	6	Region6	1					
7	7	Region7	1					
8	8	Region8	1					
9	9	Region9	1					
10	10	Region10	1					
11	11	Region11	1					
12	12	Region12	1					
13	13	Region13	1					
14	14	Region14	1					
15	15	Region15	2					
16	16	Region16	2					
17	17	Region17	2					
18	18	Region18	2					

- 2. Click on the Cascading combo define which box. Then, question will filter the categories (parent question).
- 3. To define the parent question, click on the Select parent question dropdown box and select a question from those listed.
- 4. Add the categories by clicking on the Add options link.
- Select parent question Select question NEW CHAPTER 8 Province 8 Region 9\_ District
- 5. In the pop-up window displayed click on Choose file and select the tab-delimited file you had prepared.

UPLOAD NEW OPTIONS

Choose File Occupation list.tab

Upload

🗹 Is cascading

ADD OPTIONS

Select parent question

You must select the parent question

Select question

Choose File No file chosen

Value

8 9

10

19

Apply

Cancel

stion

filtered

6. Click on the *Upload* button and confirm your selection by clicking on the *Apply* button.

- 7. To update the categories click on the *reload* link.
- 8. After importing the categories you can edit them by clicking on the Upload new options link.

On the tablet, once the enumerator starts typing letters a subset of options filtered first by the parent question and then by the entered letters, is shown.

UPLOAD NEW OPTIONS

Click reload to update options

Region19

	Region	
	Tap to enter text	
	Region1	
	Region2	
	Region3	
	Region4	
	Region5	
1	2 <sup>@</sup> 3 <sup>#</sup> 4 <sup>7</sup> 5 <sup>%</sup> 6 <sup>^</sup> 7 <sup>&amp;</sup> 8 <sup>*</sup> 9 <sup>(</sup>	0 <sup>)</sup> Del
q	wertyuio	p 🛯
a	sd <u>f</u> gh <u>j</u> kl	Done
<del>ث</del>	z x c v b n m , ! .	? 仓
Ctrl	Sym 📋 English(US)	

	Upload	
Title		Parent value
Regi	on1	1
Regi	on2	1
Regi	on3	1
Regi	on4	1
Regi	on5	1
Regi	on6	1
Regi	on7	1
Regi	on8	1
Regi	on9	1
Regi	on10	1
Regi	on11	1
Regi	on12	1
Regi	on13	1
Regi	on14	1
Regi	on15	2
Regi	on16	2
Regi	on17	2
Regi	on18	2

2

## 4.3.11.5 Is linked

This feature automatically creates the list of categories during the interview. The categories will be the answers an interviewee has given in a previous question or roster. Both question types, categorical: single-select and multi-select, can be defined as a linked question.

Bind to question from roster group

You must bind this question

Select question

To define a question as linked,

- **1.** Click on the *Is Linked* checkbox.
- 2. Click in the *Bind to question from roster group* dropdown box, and select the question or roster from which the list of categories will be created. A *roster* or a *numeric, text or date* questions *within a roster* can be selected in this field.

_		
	😒 Is linked	
в	Bind to question from roster group	
Γ	Select question	
	Select question	_
	PERSONAL INFORMATION / PERSONAL INFORMATION	
	12 Age of %rostertitle%	
	WORK EXPERIENCE / WORK EXPERIENCE	
	12 How many jobs have you had excluding the current job	
	AB Name of your current supervisor	
Ξ	12 What is %name_sp%'s phone number?	
ł		
	INFORMATION ABOUT THE ENTERPRISE / PARTNERS ROSTER	
-	AB Name of %enterprise%'s partner	
V	⊘ In which date the partnership has started?	
-		
	INFORMATION ABOUT THE ENTERPRISE / TYPE OF PAYMENTS ROSTER	
-	Since when, does %enterprise% accepts to be payed by %rostertitle%?	
=	12 What is the percentage of total payments received by %enterprise% for the type	of

🗹 Is linked 🔨

In the example, the question "Which was %enterprise%'s first partner?" is a question linked to "Name of %enterprise%'s partner". This means, the list of categories (possible answers) for the question "Which was %enterprise%'s first partner?" is the list of names given by the interviewee, when they answer the question "Name of %enterprise%'s partner".

How it looks in the designer						
Information about the Enterprise	Q	Question text				
	/-	Which was %enterprise% first partner?				
12 How many days a week %enterprise% is open to the public?	daysopen	1				
12 How many partners does %enterprise% have?	totpartner	✓ Is linked				
- Roster: PARTNERS ROSTER	Partnerroster					
AB Name of %enterprise%'s partner	namenartner	Bind to question from roster group				
In which date the partnership has started?	datepart	AB Name of %enterprise%'s partner				
8= Which was %enterprise% first partner?	firstpartner					
8- 0 · · · · · · · · · · · · · · · · · ·						

How it looks on the tablet				
Question which answers will be used as Linked question categories				
■ Information about the Enterprise	INFORMATION ABOUT THE ENTERPRISE / Partners Roster - World Bank :			
How many partners does Business Solutions have?	Name of Business Solutions's partner World Bank			
Partners Roster - []	In which date the partnership has started? 9/14/2015			
Section not started Partners Roster - [] Section not started	To parent			
Partners Roster - [] Section not started				
Partners Roster - [] Section not started				
Which was Business Solutions first partner?				

# 4.3.11.5.1 Filtered linked questions

The filter option enables you to specify a criteria where only answer options that satisfy that criteria will be shown. For example, you can make sure that only a person of 16 years or older may be a head of the household. Other household members will not be shown in the list. Other commonly encountered situations are selecting women of childbearing age, selecting persons of working age, selecting children who are not fully vaccinated, etc. To add a condition on the answer options of a linked categorical question in your questionnaire, enter your criteria in the Filter text box.

For example, to display females from the household roster between the ages of 15 and 49 as answer options, use the following criteria: age.InRange(15,49) && gender==2.

Have you ever given birth?	
🗹 Is linked	
Bind to question from roster group	
ENABLING CONDITIONS Roster: Household Roster	$\sim$
Filter	

# 4.3.11.6 Record answer order

A *categorical: Multi-select* question is a multiple-choice question, where the interviewee can select one or more options from the possible answers. You can choose to display (on the tablet) and save (when exporting the data) the answers in the order given by the interviewee.

In the designer					
If you expect the answers to be ordered, check the <i>record answer order</i> box.	🕙 Record answer order				

Select the three most common types of contract, Business Solutions use to hire people?	Select the three most common types of contract, [] use to hire people?
✓ Fixed term	1 😒 Fixed term
Personal service agreement	Personal service agreement
😒 Internship	3 😒 Internship
International consultant	International consultant
S National consultant	2 😒 National consultant
O Other	□ Other

# 4.3.11.7 Yes/no mode

A *categorical: Multi-select* question is a multiple-choice question, where the interviewee can select "yes" or "no" for all options listed.

In the designer		
If you want to display yes/no radio buttons for each item, check the Yes/NO mode box.	🗹 Yes/No mode	

On the tablet – Yes/No mode						
	Does the enterprise sell [ITEM]? Yes / No					
	● / ○ Cereals	×				
	○ / ● Roots and Tubers	×				
	• / O Vegetables	×				
	● / ○ Fruits	×				
	● / ○ Meat and Fish	×				

# 4.3.11.8 Filtered Answer Options

You can define a filter to describe the conditions under which answer options will be displayed to the interviewer via the Filter field for single and multi-select categorical questions. Linked questions can also include a filter.

In food consumption modules, questionnaire designers can limit answer options to those that make sense for each food item (e.g., weight units for solids, volume units for liquids). In demographic modules, you can filter a linked question that lists potential owners of the household's dwelling to the set of age relevant household members.

The Filter field contains a condition that is evaluated against each potential answer option. When the condition is true for a particular answer option, that answer option is displayed. When the condition is false (or yields an exception), that option is not displayed in Interviewer. In other words, the feature functions like an enabling condition for answer options, enabling only those answer options that satisfy the filter condition.

There are also two new keywords that are only available in the Filter field. For non-linked questions, the keyword @optioncode provides a way to refer to the answer options for the current question.

For linked questions, the keyword @current, used as a variable prefix, allows you to differentiate between the value of a variable for current roster row and that for all other rows in the current roster. For example, one may filter down the list of potential fathers to those members that are older than the current person (the child) by writing: age > @current.age.

```
Filter
// male
hh_b03 == 1
&&
// at Least 13 years older than the current person
hh_b05a >= @current.hh_b05a + 13
```

#### 4.3.12 Integer

A *numeric* question can only be answered with a number. You can choose between an integer<sup>9</sup> or a real<sup>10</sup> number as the type of answer you expect. You also have the option of assigning a maximum integer value or the number of decimals places to be accepted in the answer.

🗌 Integer

□ Use 1000 separator (?)

Number of decimal places

🗹 Integer

忆 Use 1000 separator (?)

By default a numeric question expects a real number answer. You have the option of assigning a maximum number of decimals or not. You do this by entering the value in the *number of decimal places* field or leaving it blank.

If you expect an integer answer you need to click on the *integer* check box.

Answers entered in numeric questions can				
be formatted to language specific				
thousands and decimal separator. To				
enable this feature, click on the use				
thousand separator check box.				

## 4.3.13 Maximum number of answers

A *categorical multi-select* question is a multiple-choice question, where the interviewee can select one or more options from the possible answers. Meanwhile, a *list* question can expect a very long list of answers. In both question types you have the option of defining the maximum number of allowed answers.

In a categorical multiple-answer question you insert the value in the Max number of answers field.

Max number of answers	}

In a list question you insert the value in the Maximum number of list elements field.

<sup>&</sup>lt;sup>9</sup> An integer is a positive or negative number without decimals, or the number zero

<sup>&</sup>lt;sup>10</sup> A real number Includes integers and numbers with decimals

Maximum number of list elements	Maximum	number	of	list	elements
---------------------------------	---------	--------	----	------	----------

# 4.3.14 Pattern

A *text* question can only be answered with a string<sup>11</sup>. The structure of the string can be defined using a pattern. This may be used for phone numbers, id codes and flight numbers.

If you know the format of the expected answer you can add a pattern in the *Pattern* field, otherwise

leave this field blank. You can see some examples of patterns in the table below .

Examples	Represent
~	Alpha character (A-Z,a-z)
#	Numeric character (0-9)
*	Alphanumeric character (A-Z,a-z,0-9)
##/##/####	Date
(###) ###-####	Phone number
AA####	Flight number
~*-###-~###	Id code

Pattern in the designer	Unanswered question on the tablet	Answered question on the tablet
Pattern (?) UY~*-###-~###	Id code Tap to enter text (UY)	Id code UYA3-583-D251

<sup>&</sup>lt;sup>11</sup> Composed by alphanumeric characters (A-Z,a-z,0-9), basic punctuation symbols and spaces

## 4.3.15 Current time date question

The current time feature in date questions allows interviewers to automatically record the current time on the tablet.

COVER	PAGE /		
Quest	ion type		Variable name(?)
$\odot$	Date	$\sim$	<i>interviewStart</i>
Varia	ble label(?)		
Quest	ion text		
	t time and date of the interview	w	

To create a current time question, check the box labeled Current Time.

To answer a current time date question,

- 1. Tap on the "Tap to record current time" box.
- 2. The current time on the tablet will automatically be recorded.

Start time and date of the inte	rview	
Tap to record current time		

## 4.4 Saving questions

Once you finish defining the question's properties, use the *Save* button on the bottom of the screen to save the changes. The *Save* button will be green if changes made to the question properties have not been saved. Once you save the changes, the button will turn grey.

D	Employees register (31Q, 8G, 8R) COMPILE			This docum	eent is private HISTORY SETTINGS LOG OUT
≡ \$m ₽	Personal information         Image: Second	D ntinue with mployees r1 gender age PASTE	Question typ	rical: Single-select v	ION / Variable name(?)
			1 2 ADD OPTIO IS linked	Male Female Combo box	SHOW STRINGS Cascading combo box DELETE MOVE TO -

# 4.5 Copying questions

There are two ways to copy and paste a question from another questionnaire or from within a questionnaire you are currently working on.

## 4.5.1 First Method

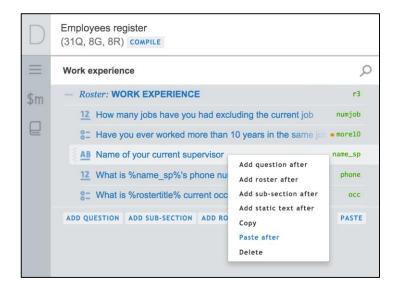
To copy and paste a question,

- 1. Right click on the question that you want to copy.
- 2. Click on *Copy* from the pop-up menu.



(If you want to past the question in another questionnaire, open that questionnaire in Designer.)

- **1.** Right click on the question, sub-section, or roster that should precede the question you have copied.
- 2. Click Paste after.



# 4.5.2 Second Method

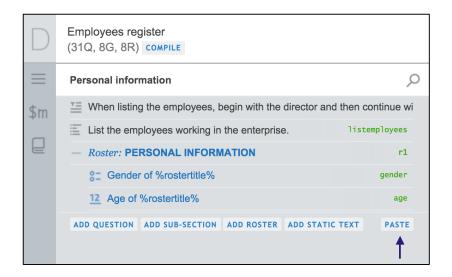
To copy and paste a question,

- 1. Right click on the question that you want to copy.
- **2.** Click on *Copy* from the pop-up menu.



(If you want to paste the question in another questionnaire, open that questionnaire in Designer.)

- **3.** In the navigation menu on the left hand panel, open the section where you want to copy the question in.
- **4.** Click *PASTE* on the bottom right of the section navigation pane.

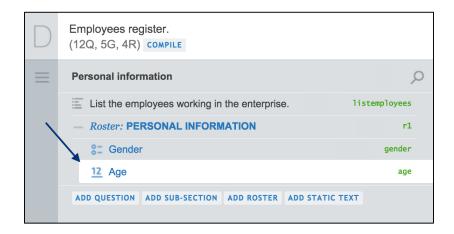


# 4.6 Moving questions

# 4.6.1 Within a section

To move a question within the same section,

- 1. In the left panel, move your mouse over the left hand side of the question
- 2. Click on it and drag the question to its new location.



D	Employees register. (12Q, 5G, 4R) compile		
$\equiv$	Personal information	Q	
	List the employees working in the enterprise.		
	- Roster: PERSONAL INFORMATION r1		
	97 Center 12 Age	gender age	
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT		

$\square$	Employees register. (12Q, 5G, 4R) COMPILE	
$\equiv$	Personal information	Q
	List the employees working in the enterprise.	stemployees
	- Roster: PERSONAL INFORMATION	r1
	<u>12</u> Age	age
	8: Gender	gender
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT	

## 4.6.2 Between sections

To move a question between sections,

- **1.** Select the question
- 2. Click on the *MOVE TO* link in the right hand panel.
- **3.** In the pop-up window displayed, click on the section to which you would like to move the question to.

PERSONAL INFORMATION / PERSONAL INFORMATION /		PERSONAL INFO	RMATION / PERSONAL INFORMAT	ION /
Question type Variable name(?)		Question ty	pe	Variable name(?)
ST Categorical: Single-select V 🖉 gender		0= Catego	rical: Single-select 🛛 🗸 🗸	& gender
variable label(?)		Variable la	bel(?)	
Gender of the employee		Gender of the	e employee	
Question text		Question te	xt	
Gender of %rostertitle%		Gender of %	rostertitle%	MOVE TO ANOTHER SUB-SECTION:
1 Male	$\times$	1	Male	Enterprise details
2 Female	$\times$	2	Female	Personal information
ADD OPTION SHOW	STRINGS	ADD OPTIC	ИС	Education
Is linked Combo box Cascading combo box		🗆 IS ]	inked 🗌 Combo box	Work experience
ADD INTERVIEWER INSTRUCTION	↓	ADD INTERV	IEWER INSTRUCTION	Working conditions Information about the Enterprise
SAVE CANCEL DELETE	MOVE TO .	SAVE	CANCEL	DELETE MOVE TO

## **4.7 Deleting questions**

There are two methods for deleting a question:

#### 4.7.1 First method

- **1.** In the left hand panel, right click on the question.
- 2. In the pop-up menu bar displayed click on *DELETE*.

$\equiv$	Personal information		Q	PERSONAL INFORMA	TION / PERSONAL INFORMATION	Variable name(?)	
\$m	$\stackrel{\text{\tiny T}}{=}$ When listing the employees, begin with	the director and then co	ntinue with the	, , ,	: Single-select 🗸 🗸	gender	
	E List the employees working in the enter	rprise. 1	istemployees		-		
	- Roster: PERSONAL INFORMATION		r1	Variable label(			
	S= Gender of %rostertitle%		gender	Gender of the em	bloyee		
	12 Age of %rostertitle%	Add question after Add roster after	age	Question text	rtitlo%		
	ADD QUESTION ADD SUB-SECTION ADD ROS	Add sub-section after	PASTE	Gender of Aroste	Tute 70		
		Add static text after Copy		1	Male		$\times$
		Paste after		2	Female		$\times$
		Delete		ADD OPTION		SHOW	STRINGS
				🗆 Is linke	d 🗌 Combo box	Cascading combo box	
				ADD INTERVIEWE	R INSTRUCTION		
				SAVE CAN	CEL	DELETE	MOVE TO .

# 4.7.2 Second method

- **1.** Select the question you would like to delete.
- **2.** Click on the *DELETE* link in the right hand panel.

D	Employees register (31Q, 8G, 8R) COMPILE		This document is private HISTORY SETTINGS LOG OUT
$\equiv$	Personal information	Q	
\$m	$\stackrel{\mathrm{TE}}{=}$ When listing the employees, begin with the director and then continue	with the	Question type Variable name(?)
	E List the employees working in the enterprise.	loyees	
	- Roster: PERSONAL INFORMATION	r1	variable label(?)
	SE Gender of %rostertitle%	gender	Gender of the employee
	12 Age of %rostertitle%	age	Question text
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT	PASTE	Gender of %rostertitle%
	ADD QUESTION ADD SOUTHER ADD ROSTER ADD STATIC TEAT	TAUL .	1 Male X
			2 Female
			ADD OPTION SHOW STRINGS Is linked Combo box Cascading combo box
			ADD INTERVIEWER INSTRUCTION
			SAVE CANCEL DELETE MOVE TO A

# 5. Sub-sections

Subsections can contain one or more static-texts, questions, other sub-sections and rosters. They are used to group a set of questions related to a specific topic. For instance in household surveys a subsection can be used to group the questions related to the household's characteristics. The main difference between subsections and rosters is that the questions within a sub-section are only asked once in an interview.

## 5.1 Adding sub-sections

You can add a sub-section at the section level (not included in any subsection or roster) or within subsections or rosters.

To add a sub-section at the section level click on the *Add sub-section* button located on the left hand panel.

See the subsection example "MARKETING ACTIVITIES".



To add a sub-section within a specific sub-section or roster, right click on the group. In the pop-up menu bar displayed, click on *Add SUB-Section*.



To add a sub-section after a specific question either at the section level or within a sub-section or roster, right click on that question. Then, in the pop-up menu bar displayed, click on *Add SUB-section AFTER*.

Cos %enterprise% perform any marketing	activity?	marketing
- MARKETING ACTIVITIES		
S= Does %enterprise% have a website?		website
8- How often %enterprise% updates its	Add question after Add roster after	ceupdate
E From the listed types of payment, select t	Add sub-section afte	r payment
- Roster: TYPE OF PAYMENTS ROSTER	Add static text after Copy	r5
⊘ Since when, does %enterprise% acce	Paste after	ini_pay
12 What is the percentage of total payment	Delete	ent_pay
- Roster: FOOD GROUPS ROSTER		r7
8: Does the enterprise sell %rostertitle%?	8	sellfood
8- Does the enterprise export %rostertitle	%?	exportfood
- Roster: NEW ROSTER		aa
List the assets own by the enterprise		assets
ADD QUESTION ADD SUB-SECTION ADD ROSTER	ADD STATIC TEXT	PASTE

## **5.2 Selecting sub-sections**

In the left hand panel, click on the sub-section you would like to work with.

Once you select a sub-section, in the right hand panel you can add or modify the sub-section's properties.



# 5.3 Defining sub-sections' properties

To define the characteristic of a sub-section you need to first select the sub-section. Then, in the right hand panel you can add or modify its properties.

## 5.3.1 Title

The *Title* box contains the title of the subsection. Here, you may also use text substitution to reference questions and userdefined or system-defined variables. To do this, enclose the question or variable name with the percentage sign (%)

INFORMATION ABOUT THE	ENTERPRISE /
Title	
Marketing Activities	
Enabling condition	(?)
marketing == 1	

## **5.3.2 Enabling conditions**

*Enabling conditions* for sub-sections work in the same way as they do for questions (See 4.3.6 ). However, the enabling condition added to a sub-section is applicable to every object within that sub-section.

For example consider the categorical single-select question "Does %enterprise% perform any marketing activity?" where: code 1 is "Yes" and code 2 is "No". Then, there is the subsection "Marketing Activities" having questions that we would like to ask only if the enterprise performs any marketing activity. To accomplish this behavior, we add the enabling condition: "marketing==1" to the "Marketing Activities sub-section". By doing this, the questions within the sub-section will be enabled only if the answer to the question "Does %enterprise% perform any marketing activity?" is "Yes" (code 1).

If disabled, the subsection button will be greyed out. To hide the disabled subsection, select the *Hide if disabled* check box.

Hide if disabled

	bes %enterprise% perform any eting activity?"	In the designer - "Marketing Activities"
Question type	Variable name(?)	
Categorical: Single-select	→ 🖉 marketing	
Variable label(?)		INFORMATION ABOUT THE ENTERPRISE /
		Title
Question text		Marketing Activities
Does %enterprise% perform any mar	xeting activity?	Enabling condition (?)
1 Yes	X	marketing == 1
2 No	×	
ADD OPTION	SHOW STRINGS	
	e answer to "Does %enterprise% ctivity?" is "No", the subsection is	
perform any marketing a	ctivity?" is "No", the subsection is	perform any marketing activity?" is "Yes", the subsection
perform any marketing a Does Business Solutio	ctivity?" is "No", the subsection is disabled.	perform any marketing activity?" is "Yes", the subsection is enabled. Does Business Solutions perform any marketing
perform any marketing a Does Business Solutio activity?	ctivity?" is "No", the subsection is disabled.	perform any marketing activity?" is "Yes", the subsection is enabled. Does Business Solutions perform any marketing activity?
Does Business Solution activity?	ctivity?" is "No", the subsection is disabled.	perform any marketing activity?" is "Yes", the subsection is enabled. Does Business Solutions perform any marketing activity? <ul> <li>Yes</li> <li>No</li> </ul>
Does Business Solution activity?	ctivity?" is "No", the subsection is disabled.	perform any marketing activity?" is "Yes", the subsection is enabled. Does Business Solutions perform any marketing activity? Yes

# 5.4 Saving sub-sections

INFORMATION ABOUT THE ENTERPRISE / Title Marketing Activities Enabling condition (?) marketing == 1 SAVE CANCEL DELETE CLONE MOVETO -

# Once you finish defining the sub-section's properties, use the *Save* button on the bottom of the screen to save the changes.

# 5.5 Copying sub-sections

There are two ways to copy and paste a sub-section from another questionnaire or from within a questionnaire you are currently working on.

# 5.5.1 First Method

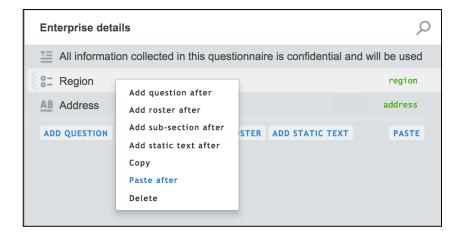
To copy and paste a sub-section,

- **1.** Right click on the sub-section that you want to copy.
- **2.** Select *Copy* from the pop-up menu.

— MARKETI	NG ACTIVITIES	Add question	•
°- Does	%enterprise% hav	Add sub-section	website
8= How o	often %enterprise%	Add roster	websiteupdate
E From the I	isted types of payr	Add static text	epted by %enter payment
- Roster: T	YPE OF PAYMEN	Paste after	r5
Since	when, does %ente	Delete	payed by %rostini_pay
12 What	is the percentage of	total payments recei	ived by %enipercent_pay

(If you want to past the sub-section in another questionnaire, open that questionnaire in Designer.)

- **1.** Right click on the question, sub-section, or roster that should precede the sub-section you have copied.
- 2. Click on *PASTE AFTER* in the pop-up menu.



# 5.5.2 Second Method

To copy and paste a sub-section,

- 1. Right click on the sub-section that you want to copy.
- **2.** Click on *Copy* from the pop-up menu.

- MARKETING ACTIVITIES		•
8 Does %enterprise% hav	Add question Add sub-section	website
8: How often %enterprise%	Add roster	websiteupdate
E From the listed types of payr	Add static text	pted by %enter payment
- Roster: TYPE OF PAYMEN	Paste after	r5
Since when, does %ente	Delete	payed by %rost ini_pay
12 What is the percentage of	f total payments recei	ved by %en percent_pay

(If you want to past the section in another questionnaire, open that questionnaire in Designer.)

- **3.** In the navigation menu on the left hand panel, open the section where you want to copy the sub-section in.
- 4. Click on *PASTE* on the bottom right side of the section navigation pane.

Enterprise details	Q
All information collected in this questionnaire is confidential an	d will be used
S= Region	region
AB Address	address
ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT	PASTE

## **5.6 Moving sub-sections**

## 5.6.1 Within a section

To move a sub-section within the same section,

- 1. In the left panel, move your mouse over the left hand side of the sub-section
- 2. Click on it and drag the sub-section to its new location.

Information about the Enterprise	Q
AB Name of the enterprise where you work	enterprise
12 How many employees does %enterprise% have?	num_employee
12 How many days a week %enterprise% is open to the public?	daysopen
12 How many partners does %enterprise% have?	totpartner
- Roster: PARTNERS ROSTER PA	RTNERROSTER
AB Name of %enterprise%'s partner	namepartner
Output: Which was %enterprise% first partner?	firstpartner
Select the three most common types of contract, %enterprise	typecontract
Ones %enterprise% perform any marketing activity?	marketing
MARKETING ACTIVITIES	
T S= Does %enterprise% have a website?	website
S= How often %enterprise% updates its website?	websiteupdate

A	Name of the enterprise where you work	enterprise
12	How many employees does %enterprise% have?	num_employee
12	How many days a week %enterprise% is open to the p	ublic? daysoper
12	How many partners does %enterprise% have?	totpartner
-	Roster: PARTNERS ROSTER	Partnerroster
	AB Name of %enterprise%'s partner	namepartner
	In which date the partnership has started?	datepart
3	MARKETING ACTIVITIES	
	Does %enterprise% have a website?	website
	8 How often %enterprise% updates its website?	websiteupdate
00	Select the three most common types of contract, %ent	erpri <b>typecontract</b>
	Does %enterprise% perform any marketing activity?	marketing

AB	Name of the enterprise where you work e	nterprise
12	How many employees does %enterprise% have?	employee
12	How many days a week %enterprise% is open to the public?	daysoper
-	MARKETING ACTIVITIES	
	Does %enterprise% have a website?	website
	enterprise% updates its website?	iteupdate
<u>12</u>	How many partners does %enterprise% have?	otpartner
-	Roster: PARTNERS ROSTER Part	nerroster
	AB Name of %enterprise%'s partner na	mepartner
	In which date the partnership has started?	datepart
8-	Which was %enterprise% first partner? first	stpartne
8-	Select the three most common types of contract, %enterpristype	econtract
0-	Does %enterprise% perform any marketing activity?	marketing

## **5.6.2 Between sections**

To move a sub-section between sections,

- **1.** Select the sub-section you would like to move.
- 2. Click on the *MOVE TO* link in the right hand panel.
- **3.** In the pop-up window displayed, click on the section that you would like to move the subsection to.

INFORMATION ABOUT THE ENTERPRISE /		INFORMATION ABOUT THE ENTERPRISE /		
Marketing Activities		Marketing Activities		
•Enabling condition(?)		•Enabling condition(?)		
marketing == 1		marketing == 1		
	Ļ		MOVE TO ANOTHER SUB-SECTION: Enterprise details Personal information Education Work experience Foreign Languages Working conditions Information about the Enterprise	
SAVE CANCEL	DELETE MOVE TO .	SAVE CANCEL	DELETE MOVE TO	

## **5.7 Deleting sub-sections**

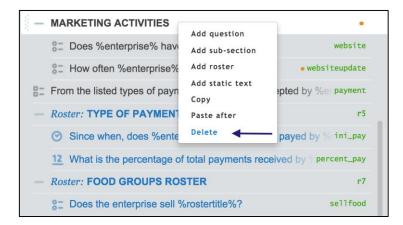
There are two methods for deleting a sub-section:

## 5.7.1 First method

In the left hand panel,

- Right click on the subsection
- 2. In the pop-up menu bar displayed click on *DELETE*.

If you have questions that are linked through enabling conditions and validation conditions within the sub-section to other questions elsewhere in the questionnaire, an error message displaying the dependent questions will first confirm that you would like to delete the sub-section.



# 5.7.2 Second method

- **1.** Select the sub-section you would like to delete.
- Click on the DELETE link in the right hand panel.
   Exactly, like the first method described above a error message will be displayed if there are links between questions within that specific sub-section and the rest of the questionnaire.

Title				
Marketing Activities				
•Enabling condition(?)				
marketing == 1				

# 6. Rosters

Sometimes it is necessary to repeat the same set of questions multiple times. *Rosters* allow you to create an auto-propagated group of questions. In other words, roster groups are used to display the same set of questions several times.

For instance, a roster group can be implemented in national household or agricultural surveys. In the former the enumerator collects data on name, age, gender, etc. per household member. In the latter the enumerator collects data on crop, quantity harvested, unit of the quantity, etc. per plot of land.

As all the questions within the group will be asked for each individual or item, it is necessary to have an individual or item id (titles of the rows) that identifies each set of questions. These titles can be created automatically (during the interview) or manually (during the creation of the questionnaire). The latter are also called fixed set of items.

Survey Solutions has 4 roster sources. Three of them depend on the question type linked to the roster : *numeric question, list question* and *multi-select question*. No question is linked to the fourth roster source: *fixed set of items*.

# 6.1 Adding rosters

With the exception of the *fixed set of items* roster source, the first step in adding a roster is to create the question that will link to the roster.

# 6.1.1 Numeric question roster source

The source question usually starts with "How many...?". The expected answer is a number. For instance:

Question which triggers the roster	Triggers the questions within the roster for
"How many people live in the household?"	Each household member
"How many partners does the enterprise have?"	Each partner
"How many lands do you cultivate?"	Each land
"How many crops did you harvest in the land?"	Each crop

The total number of household members, partners, lands or crops determines how many times the questions within the roster will be repeated.

The pictures below show an example for the question: "How many partners does the enterprise have?"

In the designer	On the tablet
INFORMATION ABOUT THE ENTERPRISE / Question type Variable name(?) 12     Numeric     Ø       variable label(?)	
Total partners of the enterprise Question text How many partners does %enterprise% have?	How many partners does Business Solutions have?
Theger Roster upper bound 20  ADD INTERVIEWER INSTRUCTION  Enabling condition (?)	Partners Roster - []
Validation condition (?)	Partners Roster - [] Section not started
Error message (?)	

## 6.1.2 List question roster source

The source question usually starts with "List...". The expected answer is an open list. For instance:

Question which triggers the roster	Triggers the questions within the roster for
"List the people living in the household"	Each household member
"List the employees working in the enterprise?"	Each employee
"List the lands you cultivate"	Each land
"List the crops you harvested in the land"	Each crop

The total number of listed household members, employees, lands or crops determines how many times the questions within the roster will be repeated.

In the designer	On the tablet
Question type Variable name(?)	
variable label(?)	
Names of the employees Ouestion text	List the employees working in the enterprise.
List the employees working in the enterprise.	Ann ×
Maximum number of list elements 30	Paul ×
Instruction (?)	Mary ×
Do not list people with an internship agreement Enabling condition (?)	Andrew ×
Validation condition (?)	Martin ×
	Tap to enter new item
Error message (?)	
SAVE CANCEL DELETE CLONE MOVE TO -	

The pictures below show an example for the question: "List the employees working in the enterprise?

# 6.1.3 Categorical: multi-select source question

The source question usually starts with "From the listed...". The expected answer is one or more options selected. For instance:

Question which triggers the roster	Triggers the questions within the roster for
"From the listed food items select those purchased last week"	Each food item selected within those listed
"From the listed crops select those cultivated in your land"	Each crop selected within those listed
"From the listed types of payment, select those accepted by the enterprise"	Each type of payment selected within those listed
"From the listed sports select those you frequently practice"	Each sport selected within those listed

The total number of selected food items, crops, types of payment or sports determines how many times the questions within the roster will be repeated.

The pictures below show an example for the question: "From the listed types of payment, select those accepted by the enterprise".

	In the designer		On the tablet
Question type	e Variable nam	e(?)	Form the listed to one of a summary activity of
Categori	ical: Multi-select 🗸 🐇 payment		From the listed types of payment, select those accepted by Business Solutions.
Variable labe	el(?)		
Type of payme	ent accepted by the enterprise		😒 Cash
Question text			Credit Card
From the listed	types of payment, select those accepted by %enterprise%.		😒 Debit Card
1	Cash Credit Card	- ×	Check
3	Debit Card	-	Other
4	Check	×	
5	Other	$\times$	
ADD OPTION Is linked	Record Max number of answers answer order	W STRINGS	Type of payments roster - Cash Section completed: 2 answers, no sub-sections
ADD INTERVIE	WER INSTRUCTION		Type of payments roster - Debit Card
SAVE C	ANCEL DELETE CLONE	MOVE TO .	Section completed: 2 answers, no sub-sections

Once you define the source question you can proceed by adding the roster. In the case of a *fixed set of items* roster where you do not need to define a source question, you can go ahead and add the roster. You can add a roster at the section level (not included in any sub-section or roster) or within sub-sections or rosters.

To add a roster at the section level click on the *Add ROSTER* button located on the left hand panel. See the roster example "PERSONAL INFORMATION".

-	List the employees working in the enterprise?	listemployees
_	Roster: PERSONAL INFORMATION	R1
	S= Gender of %rostertitle%	gender
	12 Age of %rostertitle%	age
ADI	D QUESTION ADD SUBGROUP ADD ROSTER ADD STATIC TEXT	

To add a roster within a specific sub-section or roster, right click on the sub-section. In the pop-up menu bar displayed click on *Add roster*.

T:	When listing the employees, begin with	the director and then	i continue wi
1	List the employees working in the enter	prise. li	stemployees
ŝ -	Roster: PERSONAL INFORMATION		r1
	S= Gender of %rostertitle%	Add question	gender
	12 Age of %rostertitle%	Add sub-section	age
A	DD QUESTION ADD SUB-SECTION ADD ROS	Add static text Copy Paste after Delete	PASTE

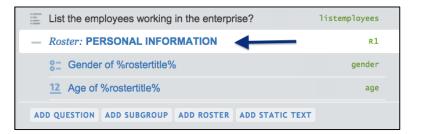
To add a roster after a specific question either at the section level or within a sub-section or roster, right click on that question. Then, in the pop-up menu bar displayed, click on *Add ROSTER AFTER*.

When listing the employees, be	egin with the director and	then continue wi
List the employees working in	listemployees	
- Roster: PERSONAL INFORM	r1	
SE Gender of %rostertitle%	Add question after	gender
12 Age of %rostertitle%	Add roster after	age
ADD QUESTION ADD SUB-SECTION	Add sub-section after Add static text after Copy Paste after Delete	TEXT PASTE

## **6.2 Selecting rosters**

In the left hand panel,

**1.** Click on the roster you would like to work with.



2. Once you select a roster, in the right hand panel you can add or modify the roster's properties.

Roster sour	ce			Roster ID(?)		
List question		$\sim$		r1		
Roster name						
Personal info	rmation					
Source questi	on (answer determi	nes both the	number and	I the name of rost	ter rows):	
PERSONAL INFO	ORMATION					~
List the	employees working	in the enterp	orise.			
Enabling co	ondition(?)					
SAVE	CANCEL					MOVE T

# **6.3 Copying rosters**

There are two ways to copy and paste a roster from another questionnaire or from within a questionnaire you are currently working on.

#### 6.3.1 First Method

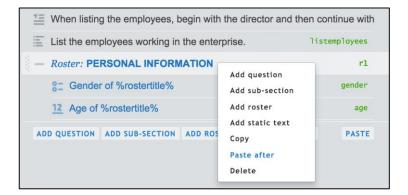
To copy and paste a roster,

- 1. Right click on the roster that you want to copy.
- 2. Click on *Copy* in the pop-up menu.



(If you want to past the roster in another questionnaire, open that questionnaire in Designer.)

**3.** Right click on the question, sub-section, or roster that should precede the roster you have copied.



# 4. Click PASTE AFTER.

$\square$	Employees register (33Q, 8G, 9R) COMPILE OK, saved at 11:29	
$\equiv$	Personal information	Q
\$m	$\underline{\underline{T}}$ When listing the employees, begin with the director and then continue with	the names of the otl
SP 111	List the employees working in the enterprise.	listemployees
	- Roster: PERSONAL INFORMATION	r1
	S= Gender of %rostertitle%	gender
	12 Age of %rostertitle%	age
	- Roster: PARTNERS ROSTER	• Partnerroster
	AB Name of %enterprise%'s partner	namepartner
	In which date the partnership has started?	datepart
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT	PASTE

#### 6.3.2 Second Method

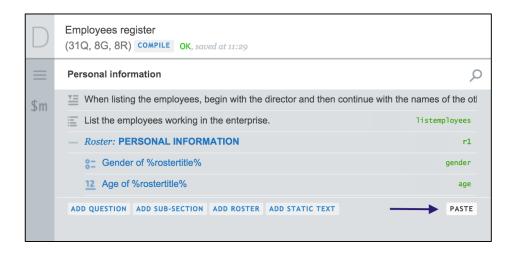
To copy and paste a roster,

- **1.** Right click on the roster that you want to copy.
- **2.** Click on *Copy* in the pop-up menu.

<u>12</u>	How many days a week %enterprise	% is open to the pub	lic? daysopen
<u>12</u>	How many partners does %enterprise% have? totpartner		
§ -	Roster: PARTNERS ROSTER		• Partnerroster
	AB Name of %enterprise%'s partner	Add question Add sub-section	namepartner
	⊘ In which date the partnership has	Add roster	datepart
0-	Which was %enterprise% first partne	Add static text	firstpartner
8-	Select the three most common types	Paste after	stypecontract
0-0-	Does %enterprise% perform any ma	Delete	marketing
_	MARKETING ACTIVITIES		•
	Does %enterprise% have a website? website		
	- websitepdates its website?		

(If you want to paste the roster in another questionnaire, open that questionnaire in Designer.)

- **3.** In the navigation menu on the left hand panel, open the section where you want to copy the roster in.
- **4.** Click *PASTE* on the bottom right of the section navigation pane.



D	Employees register (33Q, 8G, 9R) COMPILE OK, saved at 11:29	
$\equiv$	Personal information	Q
\$m	$\underline{\underline{\ }}$ When listing the employees, begin with the director and then continue with the	he names of the otl
50111	List the employees working in the enterprise.	listemployees
	- Roster: PERSONAL INFORMATION	r1
	S= Gender of %rostertitle%	gender
	12 Age of %rostertitle%	age
	- Roster: PARTNERS ROSTER	• Partnerroster
	AB Name of %enterprise%'s partner	namepartner
	⊘ In which date the partnership has started?	datepart
	ADD QUESTION ADD SUB-SECTION ADD ROSTER ADD STATIC TEXT	PASTE

One thing to note is that rosters may not be pasted as the top-level elements (sections); instead rosters must be inserted into an existing section (or sub-section).

# 6.4 Defining rosters' properties

When you select a roster, you can see its details in the right hand panel. Rosters are defined by a set of properties. While some features are common to all roster types, others are defined for a specific roster source.

#### 6.4.1 Roster source

Survey Solutions has 4 roster sources. Three of them depend on the question type linked to the roster : *numeric question, list question* and *multi-select question*. No question is linked to the fourth roster source: *fixed set of items*. (For details on the trigger questions, see 6.1 Adding rosters).

Roster type	Source question types
Numeric question	Numeric
List question	List
Categorical: Multi-select question	Categorical: Multi-select
Fixed set of items	Not applicable

To select the roster source, first click on the *Roster source* dropdown box.

Roster source	/
Fixed set of items	×

From the pop-up menu select the roster source
by clicking on it.

Roster	source	
Fixed	set of items	$\sim$
Fixed	d set of items	
List	question	
Multi	i-select question	
Nume	eric question	

The answer to the source question or the number of fixed set of items, defines the number of times the questions within the roster are repeated. This means that there will be a set of questions for each subject (individual, enterprise, crop, land, food item, non-food item, etc.). For this reason, a subject id (name, code id, etc.) is needed to differentiate the set of questions among the different subjects. The subject's id can either be created automatically during the interview or be fixed.

Roster type: Numeric question The subject ids are the answer given to a question within any roster having the same trigger question as the current roster.		
	:	
Partners Roster - World Bank		
Section completed: 2 answers, no sub-sections		
Partners Roster - FAO		
Section completed: 2 answers, no sub-sections		
Partners Roster - WFP		
Section completed: 2 answers, no sub-sections		
Partners Roster - IFAD		
Section completed: 2 answers, no sub-sections		

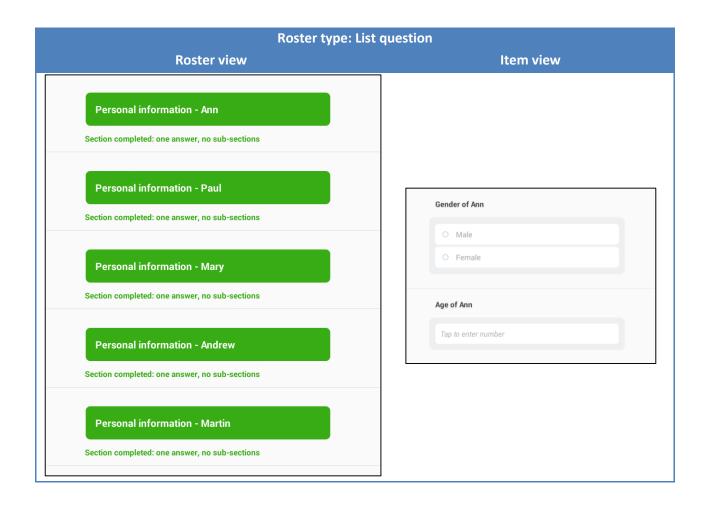
The subject ids	Roster type: List are the answers lis	
= F	Personal information	
	List the employees working in the e	nterprise.
	INSTRUCTION Do not list people with an internship agreement	
	Ann	×
	Paul	×
	Mary	×
	Andrew	×
	Tap to enter new item	
	Personal information - Ann	
	Section not started	
	Personal information - Paul	
	Section not started	
	Personal information - Mary	
	Section not started	

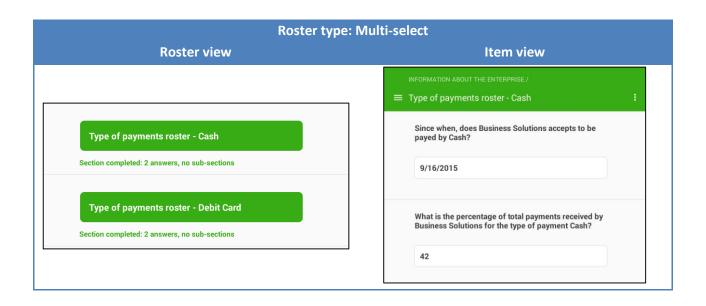
Roster type: Multi-select The subject ids are the answers selected in the trigger question. In this example: Cash and Debit Card.		
Information about the Enterprise From the listed types of payment, select those accepted by Business Solutions.	•	
<ul> <li>Cash</li> <li>Credit Card</li> <li>Debit Card</li> <li>Check</li> <li>Other</li> </ul>		
Type of payments roster - Cash         Section completed: 2 answers, no sub-sections         Type of payments roster - Debit Card         Section completed: 2 answers, no sub-sections		

Roster type: Fixed set of items The subject ids are the fixed items defined in the designer.				
		■ Information about the Enterprise		
Roster sour	ce			
Fixed set of	items	Food groups roster - Cereals		
		Section completed: 2 answers, no sub-sections		
Roster name	-	Food groups roster - Roots and Tubers		
Food groups	sroster	Section completed: one answer, no sub-sections		
Fixed set	of items: (?)			
0	Cereals	Food groups roster - Vegetables		
		Section completed: one answer, no sub-sections		
1	Roots and Tubers			
2	Vegetables	Food groups roster - Fruits		
3	Fruits	Section completed: 2 answers, no sub-sections		
		Food groups roster - Meat and Fish		
4	Meat and Fish	Section completed: one answer, no sub-sections		
5	Other			
ADD ITEM		Food groups roster - Other		
		Section completed: one answer, no sub-sections		

The tablet displays the roster groups in a single row mode. To navigate to the next row, click on the To Parent button to go back to the list of all the roster items and choose another row to complete.

Roster type: Numeric question			
Roster view	Item view		
Partners Roster - World Bank			
Section completed: 2 answers, no sub-sections	INFORMATION ABOUT THE ENTERPRISE /		
	■ Partners Roster - World Bank :		
Partners Roster - FAO	Name of Business Solutions's partner		
Section completed: 2 answers, no sub-sections	World Bank		
Section completed. 2 answers, no sub-sections			
Partners Roster - WFP	In which date the partnership has started?		
Partners Roster - WFP	9/14/2015		
Section completed: 2 answers, no sub-sections			
	To parent		
Partners Roster - IFAD			
Section completed: 2 answers, no sub-sections			





Roster type: Fixed set of items			
Roster view	Item view		
Food groups roster - Cereals Section completed: 2 answers, no sub-sections	INFORMATION ABOUT THE ENTERPRISE / Food groups roster - Cereals		
Food groups roster - Roots and Tubers Section completed: one answer, no sub-sections	Does the enterprise sell Cereals?		
Food groups roster - Vegetables Section completed: one answer, no sub-sections	O No		
Food groups roster - Fruits Section completed: 2 answers, no sub-sections	Does the enterprise export Cereals?		
Food groups roster - Meat and Fish Section completed: one answer, no sub-sections	O No		
Food groups roster - Other Section completed: one answer, no sub-sections	To parent		

#### 6.4.2 Variable name

The *Roster variable name* is the unique identifier of a roster. It has to start with a letter, but can contain numbers and the underscore symbol. As it is not needed during the interview, the variable name is not visible on the tablet.

Roster source		Roster variable name (?)	
Numeric question	$\sim$	<pre>   Partnerroster </pre>	
Roster name		·	
Partners Roster			

#### 6.4.3 Roster name

	Roster source			Roster variable name	
The Roster name box contains the	Numeric question	$\sim$	Þ	Partnerroster	
name of the roster.	Roster name Partners Roster				

#### 6.4.4 Enabling condition

*Enabling conditions* for rosters work in the same way as they do for questions (See 4.3.6 Enabling condition). However, the enabling condition added to a roster is applicable to every object within that roster.

To visualize this with an example, let's imagine the numeric question "How many partners does %enterprise% have?" with the variable name "totpartner". Then, there is the roster "Partners Roster" that has questions we would like to ask only from enterprises that have partners. To accomplish this behavior, we add the enabling condition: "totpartner>0" to the roster "Partners Roster". By doing this, the questions within this roster will be enabled only if the answer to the question "How many partners does %enterprise% have?" is higher than 0.

To hide roster if it is disabled, select the *Hide if disabled* check box.

🗌 Hide if disabled

In the designer - "How many partners does %enterprise% have?"	In the designer - "Partners Roster"
INFORMATION ABOUT THE ENTERPRISE / Question type Variable name(?) 12 Numeric Variable label(?) Total partners of the enterprise Question text How many partners does %enterprise% have? Variable label Variable name(?) Variable name(?)	INFORMATION ABOUT THE ENTERPRISE / Roster source Roster ID(?) Numeric question Partnerroster Roster name Partners Roster Source question for number of rows: INFORMATION ABOUT THE ENTERPRISE 12 How many partners does %enterprise% have? Source question for names of rows: INFORMATION ABOUT THE ENTERRISE / PARTNERS ROSTER AB Name of %enterprise%'s partner
ADD INTERVIEWER INSTRUCTION	eEnabling condition(?) totpartner > 0 SAVE CANCEL DELETE MOVE TO -

On the tablet - When the answer to "How many partners does %enterprise% have?" is 0,	the questions within the roster are not shown and the text "Questions are absent" is displayed.
How many partners does Business Solutions have?	Which was Business Solutions first partner? Options will be available after answering referenced question
On the tablet - When the answer to "How many partners does %enterprise% have?" is higher than 0,	the questions within the roster are displayed.

# Survey Solutions

How many partners does Business Solutions have?	Partners Roster - [] Section not started
	Partners Roster - [] Section not started

# 6.4.5 Source question

For the roster types: *numeric question, list question* and *categorical: multi-select,* you need to associate the roster to its source question.

To do this,

1. Click on the Source question (answer determines both the number and the name of roster rows), drop down box.

**2.** Select the question from the list of questions displayed.

	Source question for number of rows:
A mumania quastian restor is	Select question
A numeric question roster is	INFORMATION ABOUT THE ENTERPRISE
comprised of <i>numeric</i> questions.	12 How many employees does %enterprise% have?
	12 How many days a week %enterprise% is open to the public?
	12 How many partners does %enterprise% have?
	E
	Source question (answer determines both the number and the name of roster rows):
	Select question
A <i>list question</i> roster is	PERSONAL INFORMATION
comprised of <i>list</i> questions.	List the employees working in the enterprise.
	INFORMATION ABOUT THE ENTERPRISE
	List the assets own by the enterprise
	Source question (answer determines both the number and the name of roster rows):
A multi-select question roster is	Select question
comprised of categorical: multi-	INFORMATION ABOUT THE ENTERPRISE
select questions.	<ul> <li>Select the three most common types of contract, %enterprise% use to hire people?</li> <li>From the listed types of payment, select those accepted by %enterprise%.</li> </ul>

#### 6.4.6 Source question for names of rows

For a *numeric question* roster, the titles of rows (subject ids) are the answer to a question within any roster having the same source question as the current roster. Therefore, when defining the roster's properties it is necessary to associate the roster to the question whose answer will be the titles of rows.

#### To do this,

- 1. Click on the Source question (answer determines both the number and the name of roster rows), drop down box.
- Select the question from the list of questions displayed.

Source question for humber of rows.	
INFORMATION ABOUT THE ENTERPRISE	$\sim$
12 How many partners does %enterprise% have?	
Source question for names of rows:	
Select question	$\rightarrow$ $\vee$
Source question for number of rows:	
INFORMATION ABOUT THE ENTERPRISE	

INFORMATION ABOUT THE ENTERPRISE	$\sim$
12 How many partners does %enterprise% have?	
Source question for names of rows:	
INFORMATION ABOUT THE ENTERPRISE / PARTNERS ROSTER	$\sim$
AB Name of %enterprise%'s partner	
INFORMATION ABOUT THE ENTERPRISE / PARTNERS ROSTER	
AB Name of %enterprise%'s partner	
In which date the partnership has started?	

#### 6.4.7 Fixed set of items

In the case of a *fixed set of items* roster, the subject ids are the fixed items defined in the designer. To define them, click on the ADD ITEM link to manually add each subject id and code.

Fi	xed set of i	tems: (?)	
	0	Cereals	$\times$
	1	Roots and Tubers	$\times$
	2	Vegetables	$\times$
	3	Fruits	$\times$
	4	Meat and Fish	$\times$
	5	Other	$\times$
	ADD ITEM		

# 7. Static-text

Static-texts are used to convey information to the enumerator or the interviewee. An example of the former can be: "When listing the employees, begin with the director and then continue with the names of the other employees in order of responsibility, from highest to lowest." An example for the latter can be: "All information collected in this questionnaire is confidential and will be used for statistical purposes only."

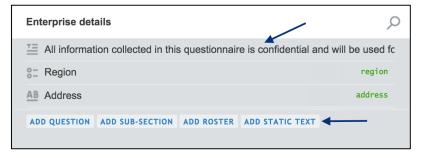
## 7.1 Adding static-texts

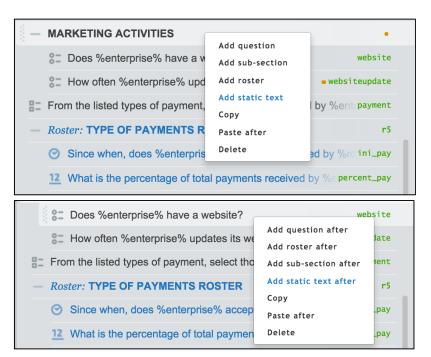
You can add a static-text at the section level (not included in any sub-section or roster) or within subsection or rosters.

To add a static-text at the section level click on the *Add static-text* button located on the left hand panel.

To add a static-text within a specific sub-section or roster, right click on the group. Then, in the pop-up menu bar displayed click on *Add static-text*.

To add a static-text after a specific question either at the section level or within a sub-section or roster, right click on that question. Then, in the pop-up menu bar displayed click on *Add STATIC-TEXT AFTER*.





	All information collected in this questionnaire is confidential and will be used for statistical purpose only					
Regi	on					
۲	Region1					
0	Region2					
0	Region3					
0	Region4					

A static-text displayed on the tablet.

#### 7.2 Selecting static-texts

In the left hand panel, click on the static-text you would like to work with. Once you select a static-text, in the right hand panel you can add or modify the static-text's properties.



#### 7.3 Defining static-texts' properties

To define the static-text properties, first select the static-text you would like to work with. Then, add or modify its properties in the right hand panel.

In the *static-text* field you can add or modify the content. You may also use text substitution to reference questions and userdefined or system-defined variables. To do this, enclose the question or variable name with the percentage sign (%).

You may also add an attachment, and/or enabling condition to the static-text.

Pictures can be shown in *static-texts*, by uploading an attachment to the questionnaire and referring to the name of the attachment in

FOOD CONSUMPTION PART 2 / CEREALS, GRAINS, AND CEREAL PRODUCTS / Static Text Maize Photo Aid
Maize Photo Aid
Attachment name
maize
•Enabling condition (?) 🖅 Hide if disabled
total_consume>0 && (@rowcode==105)

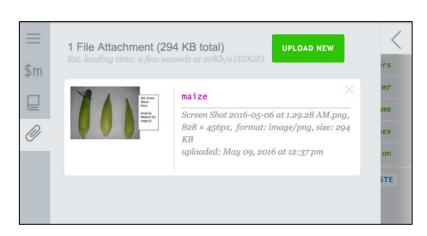
Sta	ic Text
Ma	ize Photo Aid
Atta	chment name
m	28

the attachment name text box.

To add an attachment to your questionnaire, click on the "paper clip" icon the toolbar on the left hand side.



Click on the Upload New button, and load your image from your computer. Set a name for the image.



Next, add a static-text to your questionnaire and type the name of image in the *attachment name* text box.

Maize Photo Aid		
Attachment name		

# 7.4 Saving static-texts

Once you finish defining the content of the static-text, use the *Save* button on the bottom of the screen to save the changes.

All information purpose only	his questionna	aire is confidentia	al and will be use	d for statistical

#### 7.5 Copying static-texts

There are two methods for copying a static-text:

#### 7.5.1 First method

Enterprise details Q confidential and will be U E All information collected in this questionnaire in Add question after SI Region on Add roster after AB Address Add sub-section after Add static text after ADD QUESTION ADD SUB-SECTION ADD ROSTER TE Сору Paste after Delete

In the left hand panel,

- 1. Right click on the static-text,
- **2.** In the pop-up menu bar displayed, click on *Copy*.

(If you want to past the roster in another questionnaire, open that questionnaire in Designer.)

- Right click on the question, sub-section, or roster that should precede the static-text you have copied.
- Roster: LANGUAGES
   C Do you speak any foreign language?
   Which foreign language do you speak
   Add question after
   Add roster after
   Add sub-section after
   Add static text after
   Copy
   Paste after
   Delete

# 4. Click PASTE AFTER.

# 7.5.2 Second method

In the left hand panel,

- **1.** Right click on the static-text
- **2.** In the pop-up menu bar displayed click on *Copy*.

Enterprise details	Q
Image: All information collected in this questionnair         Image: Collected in this questionnair	Add question after Add roster after Add sub-section after Add static text after Copy Paste after Delete

(If you want to paste the roster in another questionnaire, open that questionnaire in Designer.)

- In the navigation menu on the left hand panel, open the section where you want to copy the static-text in.
- Foreign Languages

   Roster: LANGUAGES
   Do you speak any foreign language?
   foreign
   Which foreign language do you speak?
   which lang

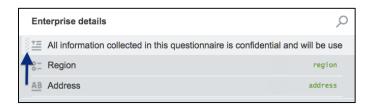
   ADD QUESTION
   ADD SUB-SECTION
   ADD ROSTER
   ADD STATIC TEXT
   PASTE
- **4.** Click *PASTE* on the bottom right of the section navigation pane.

## 7.6 Moving static-texts

#### 7.6.1 Within a section

To move a static-text within the same section,

- 1. In the left panel, move your mouse over the left hand side of the static-text
- 2. Click on it and drag the static-text to its new location.



Enterprise details	Q	Enterprise details	Q
S= Region	region	©= Region	region
$T^{\pm}$ All information collected in this quanticipative is confidential and y	will be use	AB Address	address
All information collected in this questionnaire is confidential and will be us		TE All information collected in this questionnaire is confi	ential and will be use

#### 7.6.2 Between sections

To move a static-text between sections,

- 1. Select the static-text you would like to move.
- 2. In the right hand panel click on the *MOVE TO* link.
- **3.** In the pop-up window displayed, click on the section to which you would like to move the static-text.

ENTERPRISE DETAILS / Static Text	ENTERPRISE DETAILS / Static Text
All information collected in this questionnaire is confidential and will be used for statistical purpose only	All information collected in this questionnaire is confidential and will be used for statistical purpose only
	MOVE TO ANOTHER SUB-SECTION:
	Enterprise details
	Personal information
	Education
	Work experience
	Foreign Languages
/	Working conditions
¥	Information about the Enterprise
SAVE CANCEL DELETE MOVE TO -	SAVE CANCEL DELETE MOVE TO

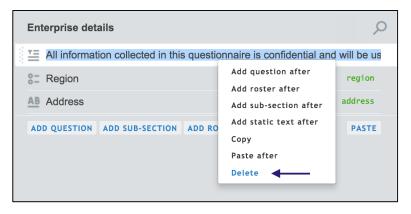
## 7.7 Deleting static-texts

There are two methods for deleting a static-text:

# 7.7.1 First method

In the left hand panel,

- **1.** Right click on the static-text
- **2.** In the pop-up menu bar displayed click on *DELETE*.



# 7.7.2 Second method

- **1.** Select the static-text you would like to delete.
- 2. In the right hand panel, click on the *DELETE* link.

All information purpose only	collected in th	nis questionr	aire is confi	ential and w	ill be used fo	r statistical
					1	

# 8. Advanced Features

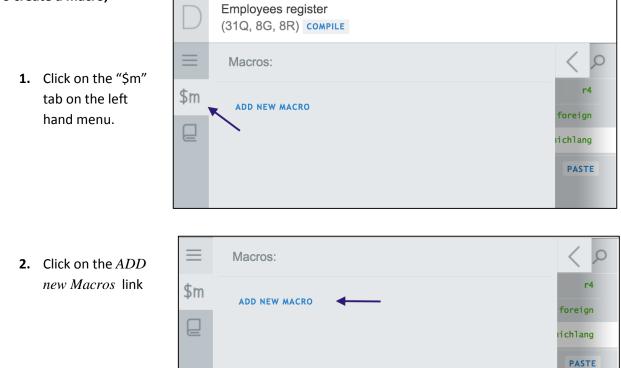
# 8.1 Macros

*Macros* simplify writing complicated expressions with repetitive sub-expressions. Consider for example, that several questions in the questionnaire are applicable to one group of persons, such as women of child-bearing age (let's say 15-44 years old, exact numbers are of no particular importance here). Suppose the variable for age is *age*, and for gender is *sex* with values 1 corresponding to males, and 2 to females. Then the following macro can be defined:

\$c=(age.InRange(15,44) && (sex==2))

It can be subsequently used in the enabling conditions for each question directed at the women of childbearing age simply as \$c, which will be substituted literally with the content of the macro as defined above.

## To create a macro,



- Employees register **3.** Define the macro (31Q, 8G, 8R) COMPILE name, content, and (optionally) a C 1 Macro: commentary r4 \$m \$c describing the foreign macro definition. (age.InRange(15,44) && (sex==2)) ichlang women of childbearing age 4. Click save. SAVE CANCEL PASTE ADD NEW MACRO
- **5.** To refer to the macro created previously in a chosen section, sub-section, question, or roster, type "\$" followed by the macro name in the enabling condition field. In this example, type "\$c".

Enabling condition(?)	
\$c	
	-

# To modify a syntax in a Macro,

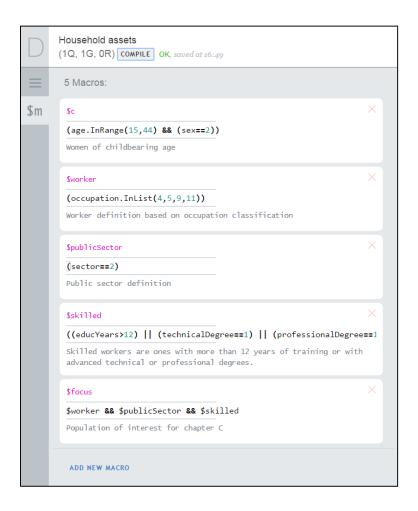
- **1.** Click on the "\$m" tab on the left hand menu.
- **2.** Locate the macro and click on any field in the macro specification to make all the necessary revisions.

# 8.1.2 Why use Macros?

- If you need to change the definition of the macro, say change the upper age limit from 44 to 45, there is a single place in the questionnaire where you need to do this;
- Groups of questions become more movable when copying a group of questions to a different questionnaire, one can change the variable names in the definition of the macro to match the new questionnaire, again, making it simpler to integrate it into a different questionnaire;
- The conditions can be much more readable, such as:
  - \$worker && \$publicSector && \$skilled Where, for example, the each individual macro could be defined as follows: \$worker=(occupation.InList(4,5,9,11)) \$publicSector=(sector==2)

```
$skilled=((educYears>12) || (technicalDegree==1) || (professionalDegree==1))
```

These values will be substituted literally into the expression that refers to macros. Note that macro definitions may not refer to other macros.



## 8.2.1 Lookup tables

*Lookup tables* are reference tables that may be used in validation and enabling conditions. They are prepared as external tab-delimited files and uploaded to the questionnaire in the Designer.

We use lookup tables to find content by some code and apply it in validations and enabling conditions as part of larger expressions. Often times this lookup code is a code of an item in a price survey, occupational code in a labor force survey, or a code of crop in an agricultural survey.

Lookup tables are particularly convenient for storing time series data, such as historical exchange rates for various currencies. Other uses involve storing estimated crop yields by crop, ranges of salaries by occupation, etc. While anthropometric z-scores can be implemented via lookup tables as well, users should refer to specialized z-score functions instead.

The lookup tables must conform to the following format:

- Contain the "rowcode" column, and up to 10 other numeric columns with reference data.
- Values in "rowcode" column must be integer and unique
- Other columns may contain repetitive content, as well as fractions.

Lookup tables may include up to 5,000 rows of reference data. Multiple lookup tables may be defined within the same questionnaire.

To upload a lookup table,

- Click on the *lookup table icon* on the left hand panel.
- 2. Click on the *Add new lookup table*.



- **3.** Type in the *table name*, and click on the *select file* link to upload the table delimited lookup table.
- 4. Click save.

D	Sample Questionnaire (2Q, 1G, 0R) COMPILE			
$\equiv$	1 Lookup Table:		<	Q
\$m	table name	×		Gender
Q	file name	SELECT FILE		Pregnant
	ADD NEW LOOKUP TABLE		= EXT	PASTE



The short syntax for the reference in condition expressions is:

# LookupTableName[code].ColumnName

It requires the name of the lookup table, the value of the code, and the name of the column for the content of interest.

Consider the following example:

Suppose, that you want to add a validation condition that provides an error message for plot areas that are greater than 2 hectares.

However, the single-select unit question allows for the plot area to be reported in other units of measurement in addition to hectare.

The tab delimited lookup table with unit conversion factors.

After uploading the tab-delimited lookup table following the directions explained previously,

Plot Details	
What is the area of the plot?	
Tap to enter number	
Unit	
O ACRE	
O HECTARE	
O SQUARE METERS	
O SQUARE KILOMETER	





•Validation condition(?)

we will add the following validation expression to the single-select unit question.

2

```
Error message(?)
```

Plot area must be less than 2 hectares. Please confirm.

Here, *plotarea* refers to numeric area question. *ConversionFactors* is the name of the look up table we have uploaded to Designer. *Self* refers to the single-select unit question that holds the validation expression, and *conversion* refers to the conversion factor column in the lookup table.

If "Acre" is selected, then the reported plot area will be multiplied by row 1 of the "conversion" column in the lookup table. And, this calculated value must be less than 2 hectare. The same follows for the other possible units.

For more in-depth information and extended examples, please refer to the *Lookup Tables Reference*.

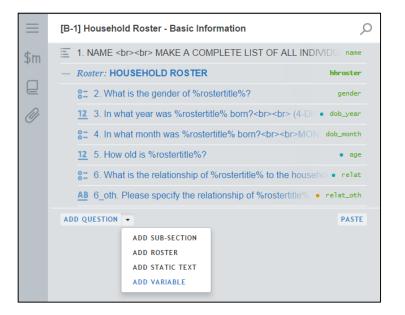
### 8.2.1 Variables

*Variables* are computable expressions that can be used to simplify validation and enabling conditions that use complex expressions. The content of a variable can be substituted into question text or static text to provide text that is more informative and dynamic.

To add a variable, use either of the following two methods:

#### METHOD 1

- 1. Click on the down arrow next to the *Add Question* button.
- 2. Select Add Variable

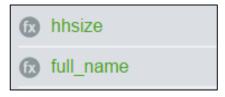


METHOD 2:

- 1. Right click on a question that should precede the variable.
- 2. Click on Add variable after.



Variables will appear in the section table of contents with the fx-icon.



Every variable will have a name, a type and an expression. Note that the variables do not have enabling or validation conditions, but a variable may still be disabled if it is part of the disabled section or sub-section. In that case the value of the variable is C#'s **null**.

# Specify variable name:

A variable name is a unique identifier for the variable. Use to the variable name to refer to the variable in enabling conditions, validation conditions, question text, static text, or in the expression of other variables.

# Specify variable type:

Choose the data type that you expect the variable's expression to evaluate to (ie numeric, true/false, text). The variable type drop down menu has five possible types to choose from:

Variable type	
Boolean	$\sim$
Boolean	
Double	
Date/Time	
Long Integer	
String	

Boolean: This data type can only evaluate to true or false

**Double:** A numeric data type. This type allows for numbers with decimal values (e.g. 2.5, 3.42). **Date/Time:** Type for values that are date and/or time

**Long Integer:** Type for integer values. Unlike the double type, this type will only allow for whole numbers (e.g. 2, 42, 7329)

String: Type for text values.

# Specify the expression:

Add the expression that you want to be evaluated to compute the value of the variable.

# Example 1:

We want to define a variable **fullName** that is a combination of a person's first name (question **firstName**) and a person's last name (question **lastName**). Here the variable would be a *String* type because the variable will be text.

[B-1] HOUSEHOLD ROSTER - BASIC INFOR	RMATION /		
Variable type			Variable name(?)
String	$\sim$	Þ	fullName
Expression (?)			
firstName + " " + lastName			

# Example 2:

We want to define a variable **countMissingAssets** to count the number of household assets where yes or no has not yet been filled in for categorical multi-select question (question **hhAssets**) that is in yes/no mode. Here the variable type would be *Long Integer* because we expect the number of items missing a response to be a whole number.

We can later to use it in a static text to the interviewer that will tell them how many assets they still have not filled out yes or not to.

HOUSEHOLD ASSETS /			
Variable type			Variable name(?)
Long Integer	$\sim$	Þ	countMissingAssets
Expression (?)			
hhAssets.Missing.Length			

## Example 3:

We want to define a variable **hhsize** that will compute the household size. We intend to use this later in validation conditions in the household food consumption module to calculate the amount of food item that was consumed per capita.

Here the variable type would be *Long Integer* because we expect the household size to be whole number. **hhroster** is the name of the roster that the household members are listed in and **name** is the variable that contains the household member's names. To get the household size, we are counting the number of non-empty names that are listed on the roster.

B-1] HOUSEHOLD ROSTER - BAS	IC INFORMATION	/		
Variable type		Variable name(?)	Variable name(?)	
Long Integer	$\sim$	🖇 hhsize		
expression (?)				

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