



SurveyPro 5

SurveyPro 5 Supplement Guide

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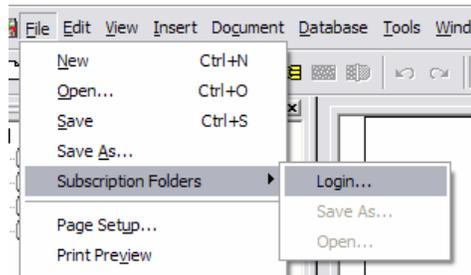
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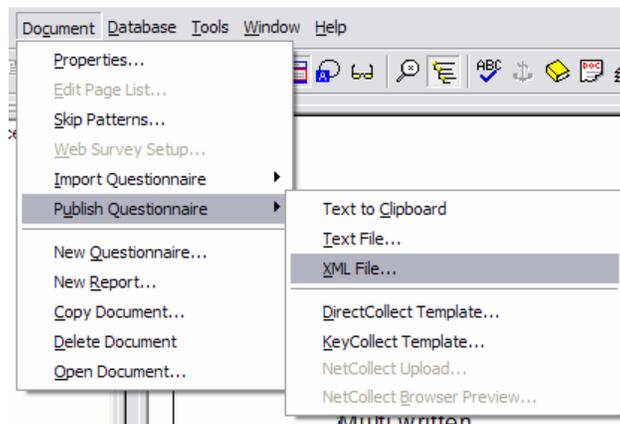
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New in SurveyPro5

[Subscription Folders](#)



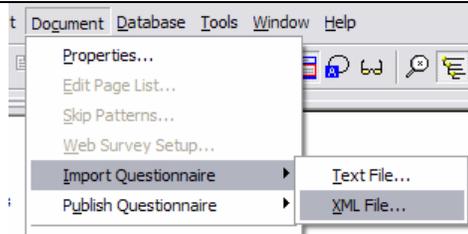
[Publish Questionnaire as XML](#)



[Import XML Questionnaires](#)

and

[Import Text Questionnaires](#)



[Printable Answer Summary](#)

Skip next page? Yes No

This is page 3, skippable --

Strongly Agree Agree Disagree Strongly Disagree N/A

Randomized grid rows:

	Importance					Performance				
	High	2	3	4	Low	Low	2	3	4	High
Appearance			<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>			
Price		<input checked="" type="checkbox"/>						<input checked="" type="checkbox"/>		
Quality			<input checked="" type="checkbox"/>							

[Respondent Survey Completion Time](#)

- Q31 [auto]: NetCollect Pages
- Q32 [auto]: NetCollect Respondent Elapsed Time

Subscription Folders

The *Subscription* service lets you “rent” by the month one or more folders on our server. You keep your active projects in those folders, and otherwise have the full capability of SurveyPro available while the folder is active. Note, you cannot save a SurveyPro file locally unless you own a full license of SurveyPro – otherwise, you must maintain an active subscription to retain access to your survey, data, and reports.

The SurveyPro subscription service is intended for people who have an occasional short survey project or as a way of sharing a SurveyPro file without requiring everyone to own a full software license for one project. There are two restrictions on projects kept in Subscription folders: (1) only one questionnaire document is supported in a folder, and (2) NetCollect web surveys can only be published to our QuestionWeb server.

If you have a *Full License* AND are using the subscription service, this enables the full software capability including the choice of saving project files on your local disk or in Subscription folders and/or publishing NetCollect to your own web server -- in other words the traditional software license with a special file sharing option.

The option of purchasing a software license or an additional subscription folder is always available. Contact Apian Sales at sales@apian.com or 800-237-4565.

File Menu

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File, Save

The Save button allows you to save the current work to whatever file it was opened from, whether that was a local disk folder or a Subscription folder.

[See Also]

[Subscription Folders, Save As](#)

File, Save As

If your SurveyPro is licensed under a Subscription folder then this saves to subscription folders, otherwise the main *File, Save As* menu always writes to a local disk file.

[See Also]

[Subscription Folders, Save As](#)

File, Open

If your SurveyPro is licensed under a Subscription folder then this opens from subscription folders, otherwise the main *File, Open* always reads from a local disk file.

[See Also]

[Subscription Folders, Open](#)

Subscription Folders

The Subscription service is a way to rent a folder by the month on the Apian server where a project file can be saved. You have access to almost all features of SurveyPro during the time the folder is active, but can only save the file there rather than on your local disk. It is intended as a trial use of the software

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for production, for people who only have an occasional short survey project, or as a way of sharing a SurveyPro file without requiring everyone to own a full software license for one project.

The *Subscription Folders* menu item will appear in a full software licensed installation so you can open or save to subscription folders when desired. A Subscription licensed installation uses the [Subscription Folders, Save As](#) and [Subscription Folders, Open](#) directly since the local hard disk storage is not available.

Each Subscription folder can hold one active SurveyPro project file at a time. You can change to a different active project by saving into that folder with a new name which will cause the previous file to become inactive. After that it is accessible as a read-only file, but cannot be edited or data added. If you find yourself doing much of this you may find that a full software license, which can save both to your local disk and Subscription folders, will be more convenient and a better value.

Files are sent in an encoded format over an https SSL encrypted secure link to the server, and every transaction message between your SurveyPro and the server is authenticated by the folder name-password combination you provide. The server itself has a high level of security.

To use the subscription service, please begin by placing your order for a folder at www.apian.com. Once your order is processed, you will receive an email with your folder name and temporary password.

Subscription Folders, Login

File > Subscription Folder > Login allows you to enter the folder ID and password for one subscription folder:



Any valid folder will do for login since this just enables access to the services. You can open or save to any folder for which you have the correct password.

If you ask the system to remember your password it will be kept in your computer's Windows registry -- more convenient but possibly less secure.

If a new folder has its temporary password then you supply the temporary here and click Login which will ask you for a password of your own to complete the login (see Change Password).

[Change Password](#) button is available to edit your password.

Change Password

A temporary password is assigned when a folder is first rented, but the first time you log in you will be asked to change it to a password of your own:



The password is yours, please be sure to write it down. Apian staff cannot retrieve it for you although the registered account owner can request that we reset it if lost.

The password you set can be changed later using a button in the login dialog.

The rules for the password require something non-trivial and hopefully non-obvious. It can use the ANSI character set which includes most European accented characters. It cannot have the full Unicode set such as oriental or other extended alphabets, nor can it have the < > | characters. Blanks are allowed. It is case-sensitive.

Examples:

Sunshine148	Yes, mixed letters and numbers
1-;-4-8-	Yes, eight mixed numbers and punctuation
Sun :) shine	Yes, twelve mixed letters and punctuation
Sun☺shine	No, uses an extended Unicode character

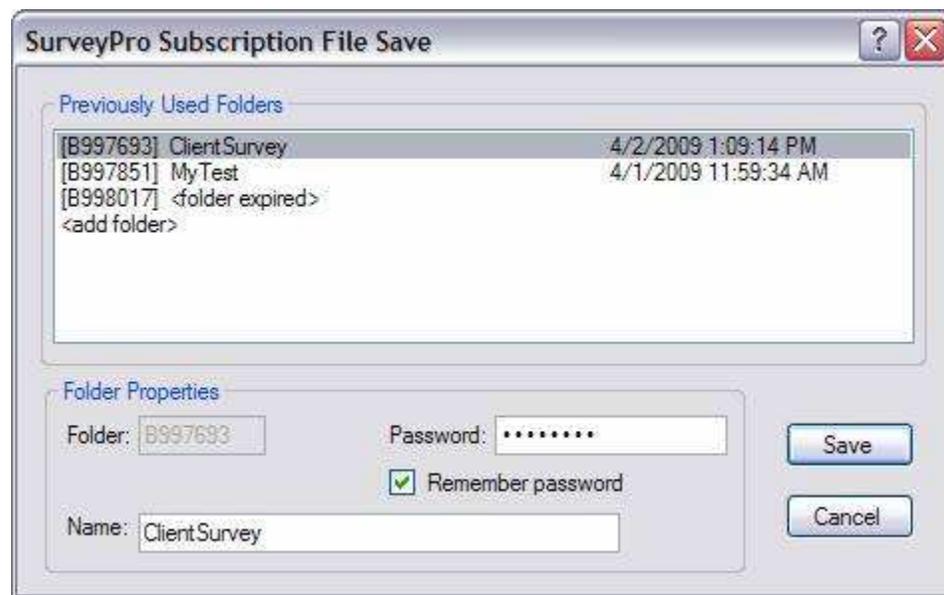
Password No, all letters and obvious

>MyCat No, too short and uses >

If you ask the system to remember your password it will be kept in your computer's Windows registry, more convenient but possibly less secure.

Subscription Folders, Save As

Save As saves a file to a subscription folder to a project file name you specify

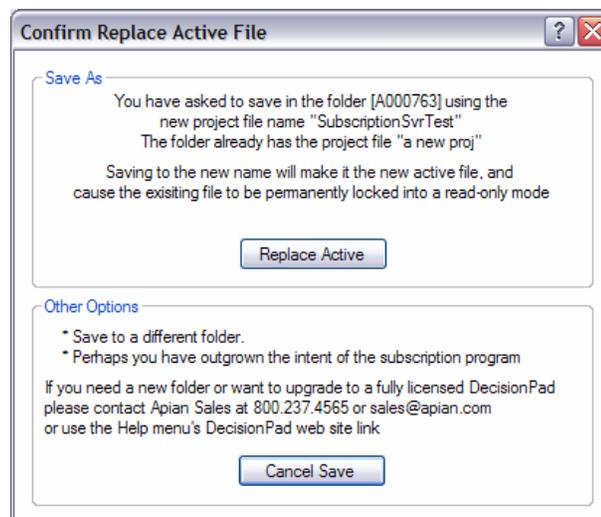


Any folders you have used before are listed here along with the project name currently active in that folder and the last time it was saved. This is not a list of all the folders on the server that you might have permission to access, just the ones you have accessed before from this computer.

You may see folders with <folder expired> or other notation letting you know it is not currently active. Contact Apian Sales at sales@apian.com or 800-237-4565 to re-activate.

The last entry is <add folder> which tells the system you want to access a new folder, adding it to your list. If you are accessing an existing folder just enter its name and password. Otherwise please order the new folder from Apian Sales at sales@apian.com or 800-237-4565, and once you receive login information you can add the new folder here.

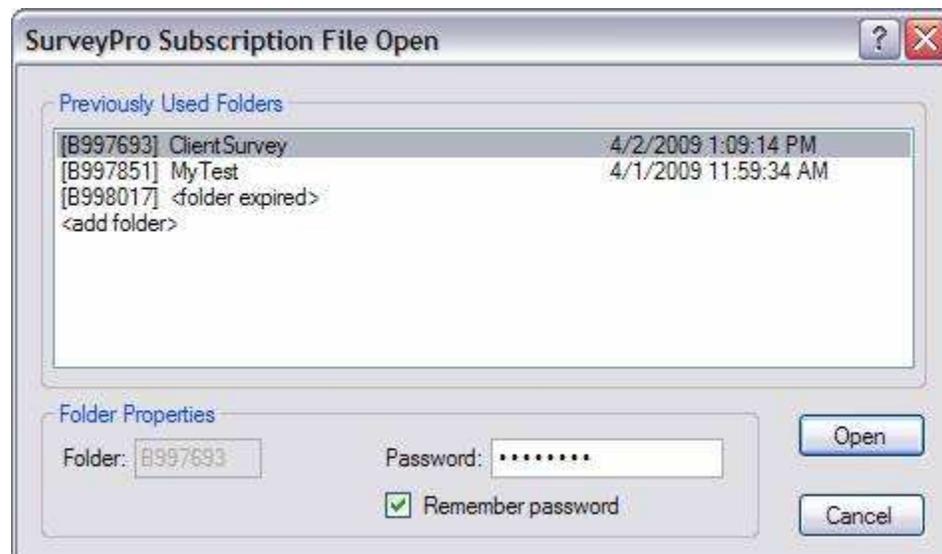
Attempting to save to a project name which conflicts with something already in the folder asks for confirmation:



It reminds you the previous project will become inactive --read-only -- which you confirm by clicking the Replace button. This is similar to the file overwrite warning in a disk file system. There are a couple other notices formatted a little differently depending on the details of the conflict.

Subscription Folders, Open

File > Subscription Folder > Open allows you to read a file previously saved to a Subscription folder:



The active projects are shown with their last write times. This is not a list of all the folders on the server that you might have permission to access, just the ones you have accessed before.

You will see a <bak> for a backup of the project file capturing the status from before the last save. If you want to undo the changes you've made since you last saved the file, you can open the <bak> version and re-save to the main name to step backwards.

You may also see <bak> for previously completed projects which can be opened for read-only access. You can print its worksheet or reports or export data but you cannot edit it until saved as an active subscription project or to a local disk (full Software licenses only).

You may see folders with <folder expired> or other notation letting you know it is not currently active. Contact Apian Sales at sales@apian.com or 800-237-4565 to re-activate.

{Sample} is a folder everyone can access with the SurveyPro sample files used in the Tutorial Guide. It does not have a password of its own.

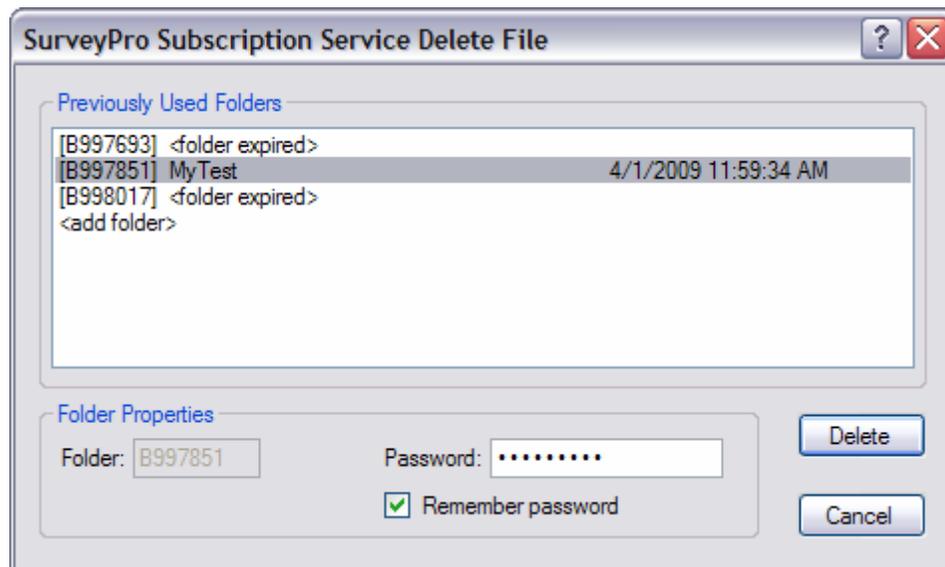
The last entry is <add folder> which lets you tell the system you want to access a new folder, adding it to your list.

If you are opening a file from the Most Recently Used file list or from the startup dialog's Last File entry, and its folder is different than the login folder, you will be asked for its password:



Subscription Folders, Delete

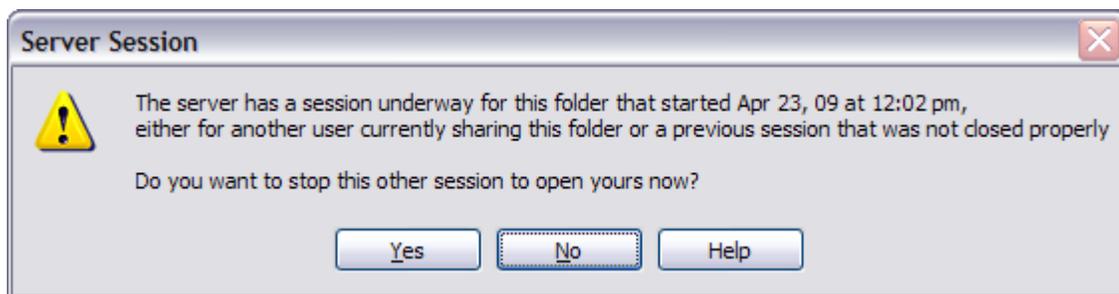
File > Subscription Folder > Delete allows you to remove a file from your subscription folder using this dialog:



CAUTION: This is a permanent delete with no 'undo' option. The file is removed from the server's file storage; so be sure you are really done with the file before clicking delete and OK.

You cannot delete a file which is currently open in SurveyPro. Use File->New or open another file to close this one, then return here to delete it.

Subscription Session Already Open



Only one SurveyPro user at a time can be working with a project in a Subscription Folder. If one person is using the file and someone else tries to access it the message above appears to ask what to do. If the session is pretty current and you know there is someone else likely to be sharing it then say *No* so you do not disconnect them.

This warning can also appear when a previous session did not get closed out properly, most often because SurveyPro was not closed before turning off the computer or because the internet connect was lost during a session. Then you would answer *Yes* here to let it know it is safe to start a new session.

Publish Questionnaire as XML

XML publish offers you a way to communicate the content of a questionnaire in a structured fashion. It is not the full layout, thus not the equivalent of an .sp5 file, rather it is aimed at several communication purposes. You can export the content, people can make changes of various kinds, and in some scenarios it can be imported back into SurveyPro without copy/paste of each item. This XML process can be used to:

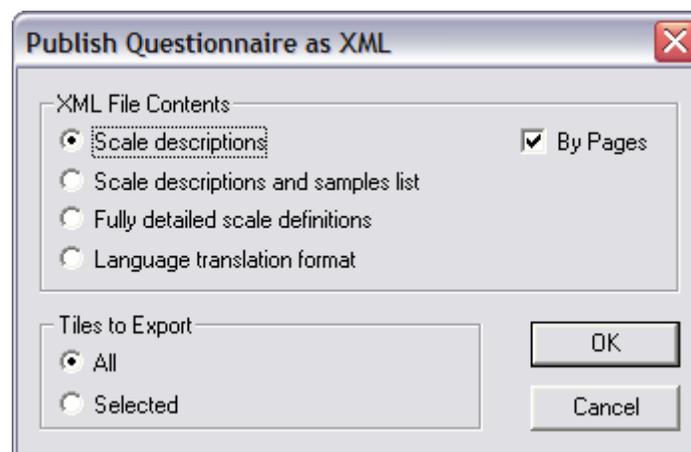
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- Make editorial inputs on a draft survey
- Make a template for people to provide draft input including typical scales
- Maintain a library of questions and scales using XML editors
- Provide a structured English survey for translators, allowing a direct import of the translations into SurveyPro (standard Windows character sets).

When you select the *Document, Publish Questionnaire, XML File* it brings up this dialog box:



These choices reflect the various objectives above.

XML File Contents

[Scale Descriptions](#)

[Scale Descriptions and Samples List](#)

[Fully detailed scale definitions](#)

[Language translation format](#)

[See Also]

[Suitable Editors](#)

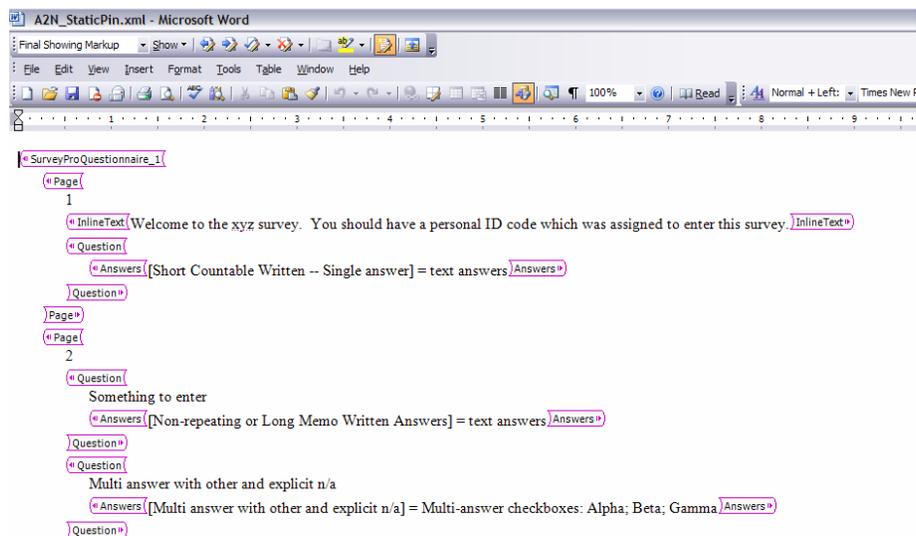
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Scale Descriptions

Scale Descriptions are intended to collect editorial feedback from people who will use an XML editor like MS Word which has the ability to track changes and comments. These are not intended to be imported into SurveyPro directly, but as input to the survey designer for their editing of SurveyPro. In Word the XML would look like this:



The XML 'tags' indicate the survey question-answer structure. The <Answers> show the scale name used in SurveyPro and a brief description of its definitions such as the checkbox labels or number formats. The people providing feedback should also have a copy of the draft survey (printed or web pages) for the layout and context.

When you get the edited XML back, open all the files in a browser, open the project in SurveyPro and incorporate the suggestions using the normal SurveyPro editing tools. Generally speaking we would not expect to import these informally edited files.

Scale Descriptions and Samples List

Scale Descriptions and Samples List are intended as a way for you to provide a template that someone else can use to draft the survey within a structure that can be imported with less work than a pure text document. Typically you would build a template survey with a few sample tiles and/or some boilerplate content, plus any scales you would typically use beyond the built-ins. The scales available appear at the end like this:

```
<SampleAnswers>
<Answers>[Short Countable Written -- Single answer] = text answers</Answers>
<Answers>[Short Countable Written -- Multiple answer] = text answers</Answers>
<Answers>[Non-repeating or Long Memo Written Answers] = text answers</Answers>
<Answers>[Date like Apr 30, 2002] = Dates like Apr 30, 2007</Answers>
<Answers>[Yes/No (Yes best)] = Checkboxes, first box is best: Yes; No</Answers>
<Answers>[Yes/No (No best)] = Checkboxes, last box is best: Yes; No</Answers>
<Answers>[Yes/No (Unordered)] = Checkboxes: Yes; No</Answers>
<Answers>[Yes/Uncertain/No (Yes best)] = Checkboxes, first box is best: Yes; Uncertain; No</Answers>
<Answers>[Excellence -- 4 levels] = Checkboxes, first box is best: Excellent; Good; Fair; Poor</Answers>
<Answers>[Excellence -- 6 levels] = Checkboxes, first box is best: Excellent; Very Good; Good; Fair; Poor; Unacceptable</Answers>
<Answers>[1 High to 5 Low Rating] = Numeric ratings from 1 to 5, lowest best</Answers>
```

Using an XML editor (see [Suitable Editors](#) suggestions) the person drafting the survey can pick up a useful looking scale from the list. These will automatically match up on import. Or they can create an <Answers> tag of their own with a description of what they want, like a list of checkbox labels, which you can turn into a proper SurveyPro scale on import.

There are four kinds of tiles that can be imported:

```
<Question>
  Skip next page?
  <Answers>[Yes/No (Unordered)] = Checkboxes: Yes; No</Answers>
</Question>
```

```
<Grid>
  values
  <Row>Price</Row>
  <Row>Quality</Row>
  <Row>Appearance</Row>
- <Column>
  Importance
  <Answers>[1 High to 5 Low Rating] = Numeric ratings from 1 to 5, lowest best</Answers>
</Column>
- <Column>
  Performance
  <Answers>[1 Low to 5 High Rating] = Numeric ratings from 1 to 5, highest best</Answers>
</Column>
</Grid>
```

```
<InlineText>This is an explanation of the questions which follow:</InlineText>
```

```
<FixedText>This is a label placed on the page rather than inline.</FixedText>
```

Fully detailed scale definitions

Fully detailed scale definitions: Intended for building libraries because the scale descriptions are complete and precise. You would export fragments of XML to contribute to the library being built in a good XML editor (see suggestions below). Then to construct a new survey you would pull the questions, grids and text tiles you want into a temporary XML file that can be imported. See Import XML Questionnaires. A typical scale in this format is:

```
<Checkboxes>
  <Name>Agree/Disagree -- 4 levels</Name>
  <L>Strongly Agree</L>
  <L>Agree</L>
  <L>Disagree</L>
  <L>Strongly Disagree</L>
  <FirstBest />
  <Legends>na|ot|SA|A|D|SD</Legends>
</Checkboxes>
```

Or for number scale with formatting template:

```
<Numbers>
(1,234.00)
<Name>custom currency</Name>
<Max>0.00</Max>
</Numbers>
```

Language translation format

Language translation format: Tightly structured for unambiguous translation and automatic import into an exact copy of the survey it was published from. The steps are to:

- Publish the completed survey in the base language, such as English, to XML for each translation language
- Provide the translator with a clean layout copy of the survey for reference - print a paper copy or publish to a web server.
- Save copies of the project .sp5 **exactly as XML published** for import later.

Translators do the translations where indicated in their XML file using a good editor (see below for recommendations). *They must not add, move or delete any of the XML elements, only change the wording where indicated.*

Import the file following the instructions detailed [Import XML Questionnaires](#).

If the process was followed properly the import will replace all the labels automatically.

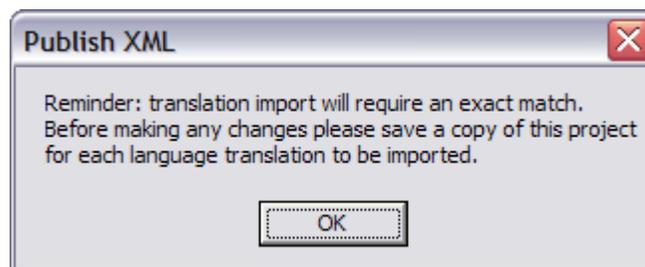
What the translator sees are all the words in the survey. For scales, they only have to translate each one the first time it is used. For example:

```
<Question Q="14|11|4c22-v4c1-653|7">
  Translate question here
  <Was>Skip next page?</Was>
- <Checkboxes S="7|2">
  <L>Translate label 1 here</L>
  <L>Translate label 2 here</L>
  <Was>Yes; No</Was>
</Checkboxes>
</Question>
```

Whether the Q= and S= codes within the <Question> element show up depends on the XML editor the translator uses. Either way they must not change them since these are how SurveyPro import matches things up automatically.

The English labels appear within the <Was> tags. Leave those alone and supply the translations immediately above where it says “Translate question here” or “Translate label 2 here”. Keep the translation entirely within the bracketing element.

After publishing you will get this reminder to save the .sp5 for import:



Any discrepancies will cause the automatic import to stop and require that you copy-paste all the translations one tile or label at a time.

ByPages: Publishes the XML with page breaks and <FixedText> tiles. Typically not used with templates.

Tiles to Export: Controls which inline tiles to export, generally used when building up a library.

Suitable Editors

At this writing here are some handy XML editors:

MS Word – most useful for its change and comment tracking capability. Not as easy to use for XML editing as some of the others.

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XML Editors – these are evolving all the time; you can check for the latest by doing a web search for “Freeware XML editor”. For example:

ConTEXT or NotePad++ -- Tabbed editing and color-coding to differentiate between tags and data

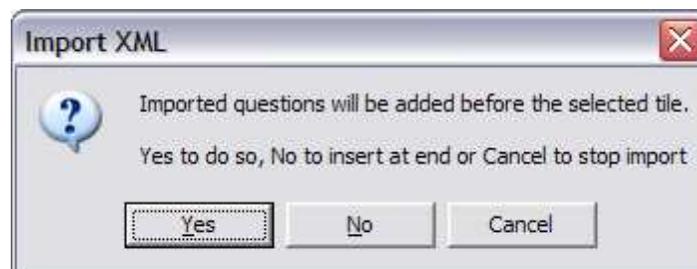
Microsoft XML Notepad or XML Marker – Tree view of the tag organization

Browsers – a great way to look at files people send to you when you do not need to edit them. Browsers also do structure testing for legal XML, handy before attempting import.

Import XML Questionnaires

These instructions are for **All Files** except Translation files. For information on how to import XML translation files go here: [Translations Files](#)

Select the menu item Document, Import Questionnaire, XML File. You will be asked for the file name. If the questionnaire already has some tiles and you have selected one, you will be asked where to insert the import:

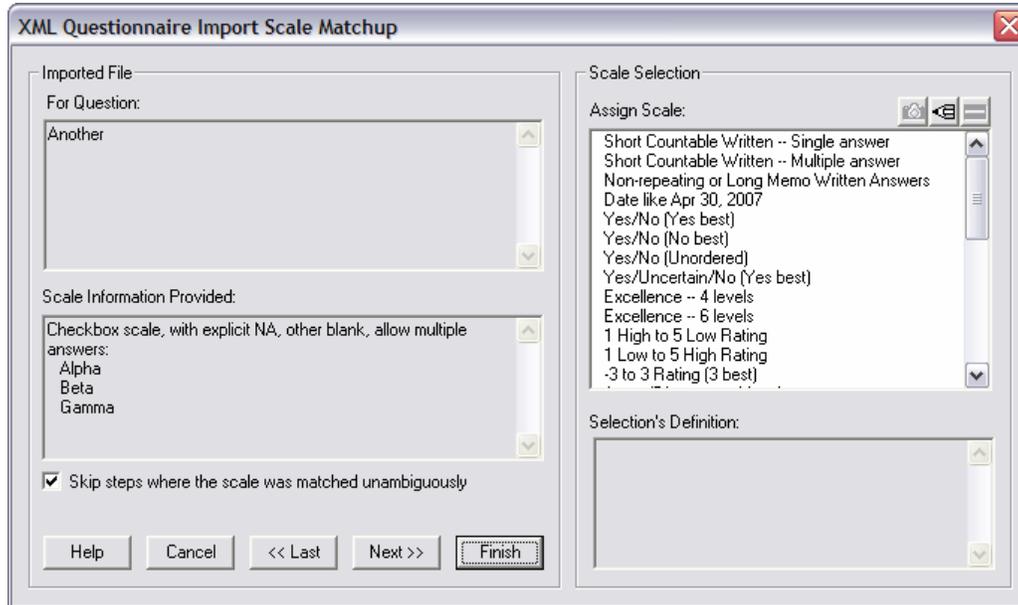


Then the file is read and tiles are inserted for the <Question>, <Grid>, <InlineText> and <FixedText> elements of the XML file. Assuming the XML structures are OK and this was not a translations file, the scale information in the XML will be collected and presented in this scale matchup wizard:

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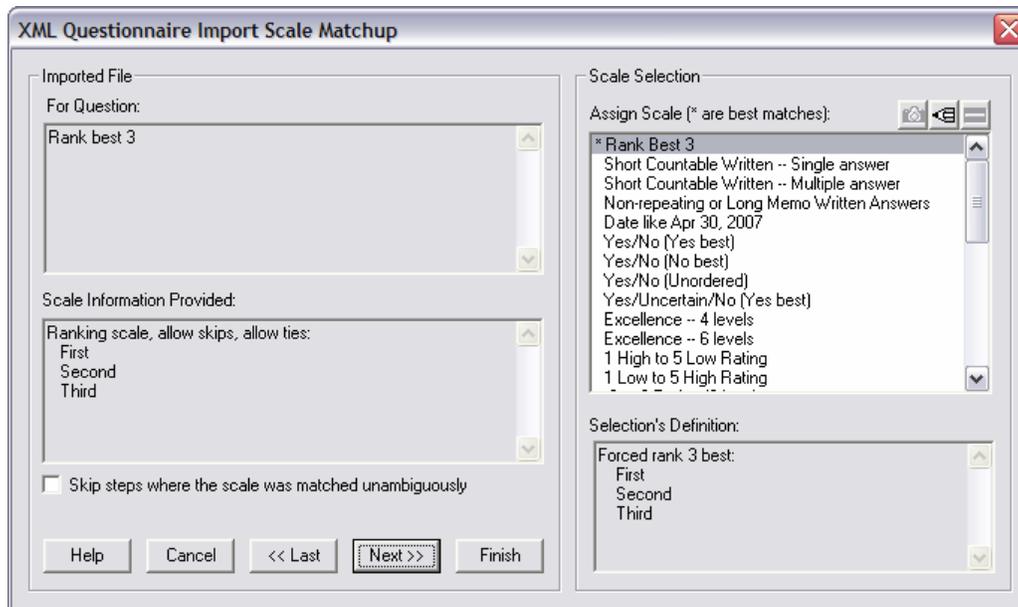
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It is a Wizard which steps through the questions and the grid columns. It starts by showing only the cases where the scales did not get matched automatically, or where there is more than one possible match. The question and scale information imported is on the left, and the scale you assign is on the right.

In the example above, to assign a scale you could select an existing scale that works, copy an existing scale and modify it, or insert a new scale. Files published with the scale names or drafted using the <Answers> list options will match on the names, or show whatever the XML shows as hints for the scale. Files published with the full scale details, usually used for libraries, will match to the built-in scales on any you added. When the details are in the XML as above, when you add a scale it will preload the new scale with the XML details like the labels and other blank.

If you turn off the *Skip steps where the scale was matched unambiguously* checkbox you can step through all the steps and the matches that were found to verify them.



When the Wizard has found possible matches they are listed first and marked with an asterisk.

Click the Finish button to apply the assigned scales at any time to the imported tiles. If not all the tiles have been assigned there will be a warning dialog to let you either go back to assign the rest or to accept what you have leaving the rest to be assigned later.

Translations Files

Files sent out for Translation (the fourth option in the XML publish: [Language translation format](#)) are much simpler. You first open the copy of the project .sp5 file you saved after the publish, then start the import. Assuming the alignment has been preserved it will replace all of the labels with the translated ones in a few seconds. Misalignments will stop the process and require that you either clean up the XML file or use copy-paste.

Import checks the project to be sure that the number of questions, grids and scales do not exceed the specified limits. Demo users note that these limits are fairly small so your import experiments will need to be simple ones, just enough to see the concept.

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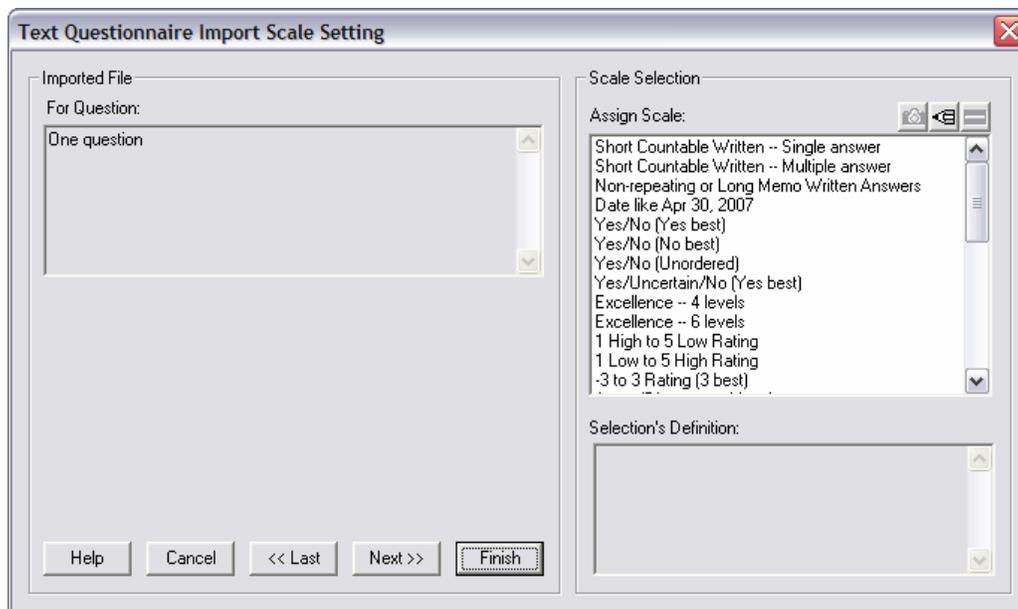
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[See Also]

[Language translation format](#)

Import Text Questionnaires

SurveyPro5 adds a new way to import questionnaire text from plain text files. It goes beyond the previous method available in SurveyPro4, having been enhanced with the scale setting dialog from the XML Import. It is a more limited import method than XML. Text import does not permit distinguishing tile types; they all come in as questions, one per text paragraph, and there is no scale information. However some users may prefer the more familiar text editors, or may already have Word questionnaires they wish to import. The scale matchup wizard looks like:



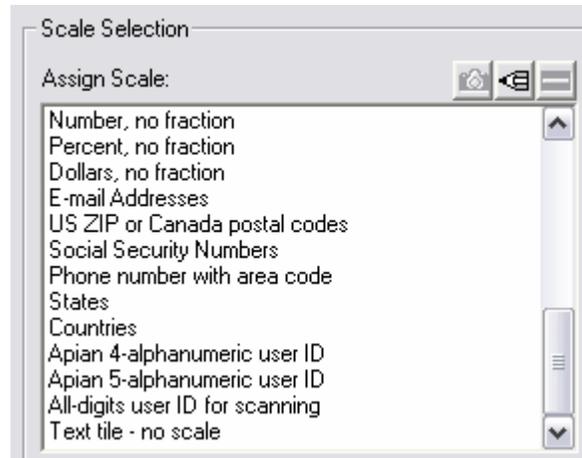
Pick the appropriate scale from the list on the right and click Next, continue until you have assigned all you want.

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At the end of the list there is an option to convert the “question” to a graphic plain inline text tile, such as a subhead or explanation that does not have a scale:



Import checks the project to be sure that the number of questions does not exceed the specified limits. Demo users note that these limits are fairly small so your import experiments will need to be simple ones, just enough to see the concept

Printable Answer Summary

This new feature allows your respondent to have a page at the end of the survey that shows all of the respondent’s answers. This enables them to review it conveniently and perhaps print a copy for their files. The survey pages are displayed in the format the respondent saw earlier, including any randomizations. No extra design work is required because all of your layouts and instructions are preserved.

Skip next page? Yes No

This is page 3, skippable --

Strongly Agree Agree Disagree Strongly Disagree N/A

Randomized grid rows:

	Importance					Performance						
	High		Low			Low		High				
	1	2	3	4	5	N/A	1	2	3	4	5	N/A
Appearance			<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>					
Price	<input checked="" type="checkbox"/>								<input checked="" type="checkbox"/>			
Quality		<input checked="" type="checkbox"/>										

When your survey has skips, only the questions a given respondent saw on pages before the answer summary page will be shown. An embedded launch which skips over page one will exclude page 1 as will the explicit page exclusion setting below.

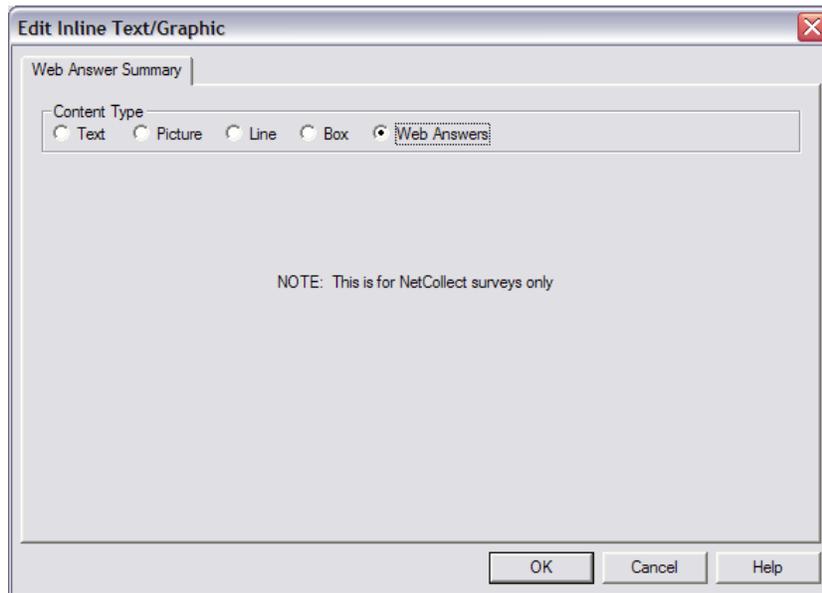
The summary itself is actually a special graphic tile that can be placed on any page after all the questions you want summarized have been asked.

You can place it on the Finish page or create a new page of its own just before the Finish page. The Summary tile cannot be on a pure “thanks” page – one after the respondent has clicked the Finished button -- because Finish sends the respondent’s data to the .sdh answer file. At that point the answers are no longer available to the survey handler; an answer summary after finish would display questions but no answers.

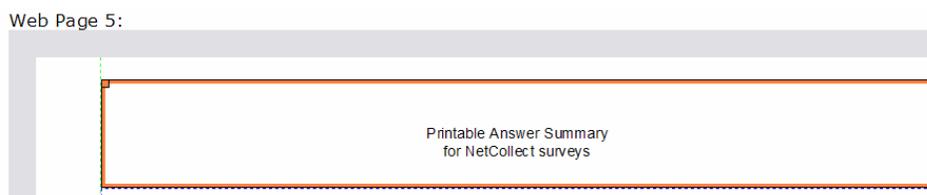
Generally you should put a text tile or two of explanation before or after the answer summary tile so it is clear to the respondent that this page is for review only and the answers cannot be changed here. Remind them to use the *survey back button* (not browser back) to make changes.

To add the answers, first decide which page will show the answer summary. Use Documents, Page List to create a new page if needed or scroll the correct page into the editing view.

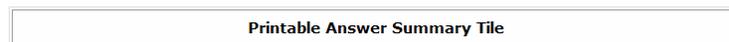
The insert a new *Inline Text/Graphic* tile and select *Web Answers*:



When you click *OK* it will display a placeholder tile in the design screens:



When you print a preview to your local browser a placeholder will appear again:

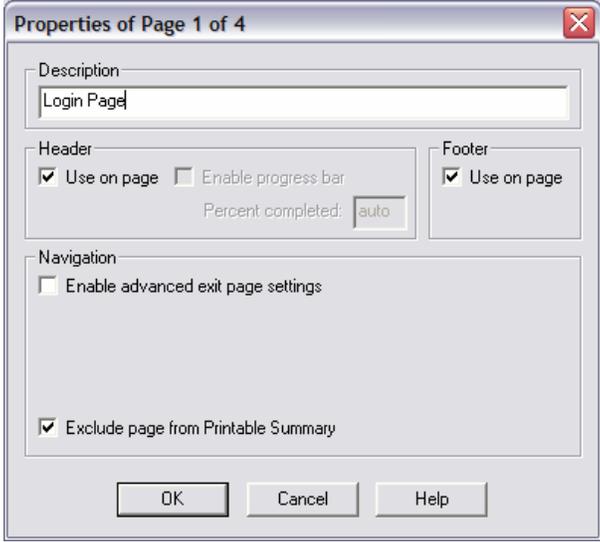


Once the survey is on the server the full answer set will appear.

Add Inline Text tiles as needed to explain to the respondent what the page is about and publish normally.

Excluding Pages from the Answer Summary

Go to *Document, Edit Page List*, select each page you want to exclude and press the Edit button to get:



The screenshot shows a dialog box titled "Properties of Page 1 of 4". It has a description field with "Login Page". The "Header" section has "Use on page" checked, "Enable progress bar" unchecked, and "Percent completed" set to "auto". The "Footer" section has "Use on page" checked. The "Navigation" section has "Enable advanced exit page settings" unchecked. At the bottom, "Exclude page from Printable Summary" is checked. There are "OK", "Cancel", and "Help" buttons at the bottom.

Set the *Exclude Page from Printable Summary* checkbox and click *OK*. Exclusion would be appropriate when a page is purely explanations, instructions or the login which are not useful for the summary.

Respondent Survey Completion Time

- Q31 [auto]: NetCollect Pages
- Q32 [auto]: NetCollect Respondent Elapsed Time

A new automatic data field has been added to record the time in seconds it takes each respondent to complete the survey. It gives the total time from first access of the login page to when they click Finish. Pausing the survey does not stop the clock – only the final submission.

The data is collected in the automatic question (Q32 in the example above) and can be reported like any other question with a number scale. SurveyPro will assign this question the built-in number scale with zero fractional digits, or if this is no longer available it will be recreated.

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