Getting started with Snap Surveys

Should you require any technical support for the Snap survey software or any assistance with software licenses, training and Snap research services please contact us at one of our offices.

Details can be found at www.snapsurveys.com or under About Snap 10 in the Help menu of the software.
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1: An introduction to Snap surveys

Snap can produce surveys for all formats, including online, paper, scanning, email, PDA, kiosk, tablet and phone.

To complement Snap's online help and extensive User and Reference Manuals, this Getting Started guide focuses on designing and publishing an online survey. It also covers online customer panels, analyzing the results and creating a paper version of the survey.

Snap online surveys are easy to create and deploy. Features include:

- routing/skip patterns
- dynamic text substitution
- rotation and randomization of questions
- rotation and randomization of question codes
- range checks
• Must Answer option
• images and color
• full Rich Text formatting
• sound and video
• email invitation/reminders
• automated scheduling of surveys and email invitations/reminders
• survey login facility (with optional password)
• pre-seeding surveys with database data (Excel, Access or SQL)
• quota controls
• saves of partially completed survey response data for analysis and "dropout" review
• full survey analysis capability on the server (including real-time updates of predefined and ad-hoc analysis)
• and much more.

Online surveys created with Snap may be hosted on a Snap WebHost server maintained by Snap (subscription service). You can also purchase the Snap WebHost software and install it on your own server.
2: Set up a survey framework

When you first start Snap you are presented with the Survey Overview window showing a list of all the surveys that have been stored in your current working folder.

1. To start a new survey, click at the top of the Survey Overview window. A new dialog will appear entitled Survey Details.

2. Type a name in the Survey field e.g. Quick.

3. Press [Tab] and enter a description in the field marked Title. Notice that as you tab to the Title field, Snap automatically prefixes the survey with the letters sn.
4. Type in a title of *QuickStart Satisfaction Survey*.

5. Below the **Title** fields are a series of fields marked **New Survey Settings**, which set out the look and feel of the questionnaire.
   - The setting for **Publication Medium** is **Web: SnapWebHost**.
   - The default setting for **Language** is set by your system.
   - The default **Style Template** is set to **Default Web.qsf**. This determines the layout of your web questionnaire, together with the fonts and the buttons used in your questionnaire.

   These settings can all be modified but leave them as they are.

6. Click **[OK]** to create the framework for the new survey. Snap will then display the **Questionnaire-Design Mode** window, which at present contains no questions.
3:  Design a questionnaire

Snap has over a dozen different types of questions and fields. These range from multi-choice questions to open questions, from free text to numeric answers, from titles and subtitles to notes and instructions. Each of these has a style defined in Snap. You enter the question text and answer labels and Snap will format the questionnaire for you.

Snap comes with style templates that have been created for particular tasks. The Default Web template has been designed for web surveys and includes all the buttons, the colors, the background, the fonts, the drop down lists and the layout for a basic web survey. None of the templates are fixed – you merely use them as guides. If you want to alter a specific question layout, you can. Snap will keep all your changes with that particular survey.

3.1:  Start with a heading for the survey

Headings and sub-headings can be placed anywhere in your survey, but Snap assumes that a new survey has a heading at the beginning together with some instructions. The Default Web template has been set up so that the styles Title and Sub Title are assumed to start the questionnaire.

The toolbar at the top of the Questionnaire window already shows Title as the Style Name for the first item. (The default settings for Title are for the text to be blue in an Arial font).
(The **Questionnaire – Design Mode** window should already be open. If not, then click the button on the main toolbar. You will see a blank questionnaire showing a highlighted area for the **Title** of the survey).

1. In the area marked **Click here for text**, type **Satisfaction Survey**. The default style is Arial 20 point but you can change the look of the text by highlighting any of the words and selecting an alternative font on the toolbar.

2. Press [Enter] when you have set up your title. An area for a **Sub Title** will then appear.

3. Type **Please help us to continue improving the standards in our restaurant by answering a few simple questions** in this area. The default setting for **Sub Title** is centered Arial 16 point.

4. Press [Enter] when you have set up your sub-title. That's how to put headings in your survey. Along with instructions, they can be placed anywhere in a questionnaire. Now move on and set up a few questions.
3.2:  Add your first multiple-choice question

After you’ve entered the subtitle and pressed [Enter], Snap automatically creates the first question. By default, this is created as a multi-choice question and the question style is shown as **Multi Choice** on the toolbar. It is stored as Q1, and given the number 1, as defined by the style template.

Our first question is about the items purchased in the restaurant. The respondent will be presented with a list of options, and they can select as many as they wish. This is a **Multi Choice** question.

1. An area is marked **Click here for text**. Type **Which of the following items did you order today?**

2. Press the [Tab] key on your keyboard. The cursor moves into an area by the selection box. Type **Hamburger** and press [Tab] to move to the next line. Snap creates a selection box for that option.

3. Continue with the text for the other items and press [Tab] after each one:
   
   *Pizza* [Tab]
   *Salad* [Tab]
   *Ice cream* [Tab]
Coffee/tea [Tab]

4. For the last code, *Soft drink*, type it in but at the end, instead of pressing [Tab] press [Enter], which will tell Snap that you want to finish this question and start a new question.

![Multi Choice](snap.png)

3.3: What about those "other" questions

It’s likely that your list of items will not be exhaustive, so it’s wise to add a space to allow the respondent to key in anything that is not mentioned on the list. This is done using an *Other* question, which collects any combination of text or numbers.

With the window showing 2 as the next question, use the button to the right of the words *Multi Choice* to display the full list of other question style names. Select *Other*. This allows the respondent to enter free format text and moves the question up to the question above.

*Snap does create this question as Q1a, but the question number is hidden from view.*
1. Click the box marked Click here for text and type Other, please specify. Snap creates a box that expects up to 100 characters. This should be sufficient to store whatever’s written. You’ll see later how to alter the size of the box to hold more data.

2. That’s all you need to create this type of question, so press [Enter] and Snap will move on to create the next question (Q2).

3.4: Add a question grid

The next task is to create a Grid which is simply a series of Single Response questions organized in the form of a grid.

If you haven't already done so, press [Enter] to complete question 1. Snap creates the structure to set up question 2. Click the button to the right of the words Multi Choice on the toolbar to display the other style names and select Grid First.

1. In the area marked Click here for text, type How did you rate the following? and press the [Tab] key on your keyboard.

2. The cursor moves to the list of codes across the top of the grid.
Type *Very good* and press [Tab]. Type *Good* and press [Tab]. Type *OK* and press [Tab]. Type *Poor* and press [Tab]. Type *Very poor* and since this is the last code to be set up, press [↓] instead of [Tab].

1. The cursor will move to the text of the first Grid label. Type *Service* and press [Tab]. Type *Quality* and press [Tab].

2. For the last Grid label, type *Price* but instead of pressing [Tab], press [Enter] to complete the grid and move to a new question (Q3).

You’ll notice that the shape of the boxes has changed for this question. Snap’s template recognizes that these are all single-response questions and since this is a web based survey, these boxes will appear as radio buttons.

### 3.5: Allow for any free-form comments

The last question is totally free format to allow the respondent to record feedback comments. Snap has automatically started to create Q3 and all you need to do is to change it from a *Multi Choice* question to an *Open Ended*. 
1. Use the ▼ button to the right of the words **Multi Choice** on the toolbar. A drop-down list will appear, displaying the other style types, and you should select **Open Ended**. This will allow the respondent to enter free format text as a reply. Type *Do you have any other comments?*

2. The default capacity for this box is 100 characters and it appears as a single line. If this is not enough space, it is easy to increase. Make sure that Q3 is selected, then either use [Ctrl] + [+] or alter the option on the toolbar formatting option from **Font to Boxes**. The **Size** field is shown and this number can be increased or decreased to change the size of the box on your questionnaire.

3. You’ve now successfully created a short questionnaire.

   Click ✔️ on the toolbar to save your work.

In the next few steps, you'll see how to access preset questions from one of the libraries and add images and routing instructions.

**3.6: Pick a demographic question from the SurveyPak library**

SurveyPaks contain frequently used questions that can be copied directly to a Snap survey, avoiding the need to specify the question from scratch. You can then edit the question within the survey. You access the SurveyPaks from the **Reference** window.

Close all windows except for the **Questionnaire- Design Mode** window. Open the **Reference** window by clicking on the 📚 button of the main program toolbar.
1. Select **Window | Tile** so that the two windows are arranged side by side.

2. Double-click on the **Personal Demographics** category in the **snReference 2009** SurveyPak.
3. Double-click the Age topic to display a number of age related questions. Highlight the first age question Age of respondent. The text of the question and the codes are displayed in the bottom part of the window.

4. Drag the Age question from the SurveyPak into the questionnaire. With the pointer hovering over the Age question, press and hold the left button, and as you move it, the pointer will change to . Keep the left button pressed and drag the question from the Reference window on the left to the Questionnaire window on the right. As you move the pointer over the questionnaire, it will alter once again:

- insert the new question before this question.
- replace this question with the new one.
5. When you release the mouse button, the new question is dropped in the position indicated and will adopt the same look and feel as all the existing questions in your survey.

Wherever you place the question, it is now part of your questionnaire. You can make changes to the text or add, edit or delete codes in the list. Snap will allocate a number to your new question wherever you’ve placed it.

6. To move your Age question, click anywhere on the question. A green border appears around the question. You can use the [Ctrl] + [↑] or [Ctrl] + [↓] to move the question. Snap will automatically renumber the question.
as you move it. Move the **Age** question until it appears as Q3.

7. The **Age** question is currently shown with radio buttons. To change this to a drop-down list, highlight the **Age** question so that a green box appears for editing. Access the first list on the toolbar currently showing **Multi Choice** and select **Drop down**. If this is not visible, select **More Styles...** to see more alternatives on the **Style Picker** list. Select the **Drop down** style and then click [OK] to close the **Style Picker**.

8. You’ve finished with SurveyPak libraries in this exercise so you can close the **Reference** window, and make the **Questionnaire – Design Mode** full screen.

3.7: **Add a logo to the title**

1. Select the **Title** field showing **Satisfaction Survey**. When you’ve selected it, a green border will appear around it.
2. Select **Background** in the toolbar topic dropdown list and click the **[Picture]** button. The **Picture** dialog will open, allowing you to select an image to insert, and choose its position.

3. Click the **[Browse]** button. The folder `Snap 10\Images\` opens by default. Change to the sub-folder `Snap 10\Images\Icons`.

4. Select the file `tick_icon.gif` and click **[Open]**. The **Picture** dialog displays your choice. Select **Centre** in the **Horizontal Alignment** drop-down list and change it to **Left**. This inserts the picture at the left-hand end of the title text. Set the radio buttons for both **Horizontal and Vertical Alignment** to **Fixed** to put a single copy of the picture in a fixed position. You may wish to alter the color of the image by using **Colourize Gif**.
5. When you’ve made your changes, click [OK] to return to the Questionnaire – Design Mode window showing the logo added to the title of the survey.

The logo is larger than the space for the title text, so it may appear cropped when you do this. Don’t worry, when you publish the survey as a web page, it will appear normally.

6. Click [✓] to save the changes to the questionnaire.

3.8: Format the screen layout

When you are creating a web survey, it is important that respondents do not miss any questions because they are not immediately visible. Snap adds buttons at the bottom of each screen to help navigation through the survey.

1. Click on Q2 to select it.

2. To introduce a page break, you have three alternatives:
   - Click the right-hand button on the mouse and select Break.
   - Press [Ctrl] + [S] to insert a page break above the question.
A third alternative is to change the Toolbar setting from **Background** to **Break** and checking the **Page Break** box.

3. When you’ve added the page break, click ✔️ to save the changes to the questionnaire.

**3.9: Add routing/skip instructions**

You rarely ask every respondent every question. It is quite typical to only ask questions based on replies to other questions in the survey. To show this in operation, create an extra question of **What would you expect to pay?** and only ask this question of those people who rated the restaurant as **Poor** or **Very poor** in terms of **Price** in Q2. Anybody who replied either **Very good**, **Good** or **OK** will **not** be asked the question.
1. The first step is to create an extra question after Q2. Highlight Q3 and select \( + \) to create a new question. Snap generates a new question with the same type (in this case, a Drop down). For a question to record a number (such as price) it needs to be Open Ended.

2. On the Toolbar options, alter the style from Drop down to Open Ended to allow any character or number to be entered in the box.

3. In the field marked \texttt{Click here for text}, type \texttt{What would you expect to pay?}

4. By default, open-ended questions have a response type of literal. This means that any characters can be entered in the box. To ensure that respondents enter a number, you must convert the response type to Quantity. You can then perform calculations on the result.

Click on \( \) to display the Variable Properties for Q3. Alter the Response field from Literal to Quantity. This question will now only accept numbers. Since you know that the
respondent is entering currency information, you can set the parameters to be slightly more specific.

![Variable Properties](image)

Change the **Source Pattern** field from *(Default Quantity)* to **Currency**. Snap will now recognize not only a number, it will also accept a currency character such as $ or £.

5. Click **[OK]** to return to the questionnaire.

Now to create the routing rules...

1. With the cursor on **Q3**, right-click the mouse and select **Routing Rules** from the context menu. Alternatively, click the **↑** button on the Questionnaire Design toolbar. The **Routing Rules** dialog will now appear.

![Routing Rules for Q3](image)
2. Click [Add] to create a new routing rule.

3. Select **Conditionally Ask Question** from the Type box and click [OK]. This means that the question will only be seen if the conditions you set are met.

![New routing instruction dialog](image)

4. The **Rule Details** dialog appears. The cursor is located in the If box.

![Routing Rules for Q3](image)

5. Type \( Q2c=(4,5) \). This means that the question will be shown if the answer to \( Q2c \) (price rating, the third part of \( Q2 \)) is code 4 or 5 (Poor or Very poor). Click [OK].
6. A small arrow appears to the left of the question. You can double-click it to see the Rule Details dialog.

7. Press [Ctrl] + [S] to insert a page break above this question. Repeat the process to add a page break to Q4. Click ☑ to save the changes to your questionnaire.
4: Publishing the questionnaire

Your questionnaire is now ready for publication, a process that will transform your questionnaire into a form that is accessible by any standard web browser. It is worthwhile selecting the Preview option as it will enable you to see how the questionnaire will appear in a web browser and will allow you to enter some test replies and try out the routing instructions. Should you need to make any changes, you can simply return to the questionnaire in Snap and then publish again to overwrite the files that have been created.

1. Select File | Publish to display the Publish Questionnaire dialog. This allows you to specify exactly how your survey will be published.

2. Select Output in the left-hand column headed Section.
3. In the field marked **Access Name**, type *quick* to provide Snap with a name that will identify the file(s) that will be generated.

4. Select **Publish with Preview** as the **Output Method**. The Preview will open a new window and display your survey as it would appear in a web browser immediately after it has been published. Use this previewed survey to test your web survey prior to placing in on the web server for execution.

5. The **Output Path** should be set to identify the folder where you wish Snap to place the published survey and associated images.

6. Select **Replies** in the left-hand column headed **Section** of the **Publish Questionnaire** dialog.

   ![Questionnaire Properties - Web: Snap WebHost](image)

   In the **Responses** field, check the **Save responses on server** box. This stores the completed survey responses on the Snap WebHost server. You can download them to your PC.
Publishing the questionnaire

(or other PCs) to analyze them there, and view uploaded analyses on the server.

You can also enter an address in the Web Page after Submitting field. Respondents will be taken to this address when they submit the survey.

7. Click [Publish] to publish the survey and create a zip file containing all the necessary files for your Snap WebHost survey in the folder you specified.

You must now upload the survey to the Snap WebHost server so that it is accessible by respondents.

4.1: Upload the published survey to Snap WebHost

1. Log into your Snap WebHost account via the Snap website (www.snapsurveys.com/login).

When you have logged in successfully, Snap WebHost displays the list of surveys in your account
2. Select **Upload a new survey** to display the **Upload New Survey** dialog.

3. Browse your PC/laptop to find the `snquick.zip` file for the survey in the folder you specified as the **Path** when you published the survey.

4. Click **[Upload Archive]** to upload the **Quick** survey from your PC to Snap WebHost.

5. When Snap WebHost has uploaded the survey, a message appears to confirm that the survey has been uploaded. Click the **[Close]** button.
The list of surveys is updated for the current user account, showing the survey snquick.

6. Click the survey name (snquick) to show the details of the survey.
4.2: Test the survey

The Summary screen is the place where you start the survey. It shows the link that you can place on a website or email people to take the survey, and allows you to test the survey.

To test the survey, click the Test URL.
4.3: Set up the survey and make it available

1. Select the Setup tab. If you want to start and finish the survey on preset dates, enter these on the **Project Start Date** and **Project End Date** fields and click [Save].

2. Start the survey from the Summary tab. If you have set up a schedule, you must click the **Wait for Schedule** link, if not, click the **Start Questionnaire Now** link.

3. Once the survey has started, provide the respondents with the survey URL given in the field "**URL will be:**" in the Summary tab for the survey. When a respondent clicks on the URL, the survey starts. When the respondent clicks the [Submit] button at the end of the survey, the data is sent to the Snap WebHost server and stored in a file for later download.

Because you set **Save responses to server** when you published the questionnaire in Snap on your PC, the **Save responses** box is checked here.
5: Collecting online survey replies

Once you've created your questionnaire and Published it, you're ready to analyze the replies from respondents. The responses have been stored on the Snap WebHost server. You can either download them to your PC for analysis or view analyses on Snap WebHost. Setting up the Snap WebHost analyses is not covered in this short introduction, but you can find full details in the online help and Snap 10 User Manual, (index topic "Data Analysis with Snap WebHost").

1. In Snap WebHost, choose the Surveys section.

2. Click the survey link for snquick.

3. Click the Summary tab. Towards the bottom is a link Download Completes (if the link is not present then there are no respondent cases to be downloaded).

4. Click the link.
5. A dialog box appears requesting confirmation from you. Click ![Save button].

6. A **Save As** dialog box appears for you to identify the location of the file to download. It is a good idea to have a standard folder into which you download response data for each survey. Note that, by default, the file will be saved under the name of the survey and the time/date of the download.

7. In the desktop copy of Snap Professional, open the *snquick* survey.

8. Open the **Data Entry** window for the survey and choose File | Import. The **Data Import** dialog appears.

9. Set the **Format** to be **MAIL format from text files**.
10. Set the **Folder** to be the same folder as specified when you downloaded the data from Snap WebHost.

![Data Import Window](image)

11. Click **[OK]** to import the responses.
6: Analyze the survey results

To help you start analyzing a survey, we’ve provided you with a sample survey called SnCrocodile. It already has over 200 completed replies.

6.1: Analyze the entire questionnaire

A unique feature of Snap is its ability to display the results of a survey in the form of a questionnaire. This is a clear and easy way of viewing a top-level summary of the survey and can easily be printed. You can create more detailed analyses in the form of tables, charts, image maps and lists.

Click the button on the main toolbar to open the Survey Overview Window. Select the snCrocodile survey and either double-click on the mouse or click .

The Survey Details dialog will appear. Click [OK] to open the survey and display the Questionnaire - Design Mode window. If it does not, click the button on the main toolbar.

1. Click the button in the Questionnaire window to switch to Questionnaire - Data View Mode.
2. Click the button next to Case Data, and select Counts. The percentage of respondents giving each answer will be shown. For example, 9% of visitors ate at the restaurant every day.

Select the Absolute check box. The questionnaire will now be presented with the number of respondents giving each answer. You’ll now see that the 18 of the 204 visitors ate at the restaurant every day. Use the vertical scroll bar to view more of the questionnaire.

6.2: Analyze a single question

Frequency tables are the quickest and easiest method of tabulating single questions. You can produce them in Snap just by specifying the name of the question or questions.

You can then use Snap to calculate percentages in tables, filter results to look at subsets of data and apply scores to results.

1. Click on the main Snap toolbar to create a results table. The Results Definition dialog will then appear.
2. In the **Analysis** field, type *q2*. The drop-down list for the **Calculate** field should show **Counts and Percents**.

![Results Definition](image_url)

3. In the **Style** field, use the dropdown to select a style for the appearance of the table. Choose **Report Band Salmon + Green**.

4. In the **Show Options** section, select **Counts** and **Base Percents**. **Counts** shows how many cases fall into each category and **Base Percents** shows all answers as a percentage of the base, i.e. total number of respondents.
5. Click [OK] to build the frequency table.

![Frequency Table]

6. Click ✅ to save the table. The name of the saved table, **AN12: Frequency of visit**, will appear in the table's Title. If the Questionnaire – Design Mode window is still open, you will get a message asking you to close it before the table can be saved.

Do not close the window containing this table, as it will be used in the instructions on the next few pages.

**6.3: Cross-tabulating a group of questions**

You can also cross-tabulate one question against other questions. For example, you could analyze the frequency of visits and break the results down by age. This example drags
Analyze the survey results

the question response to be analyzed directly into the table from the Variables window (instead of using the button to show the definition).

1. Click the button to open the Variables window.

You should now have two open windows: one containing a list of variables in the survey and another showing the table produced in the previous section.

If the table is not open:
   - Click the button to open the Results window.
   - Double-click the table, or select it and click the button.
2. Arrange the two windows with the **Variables** window on the left and the table of Q2 on the right.

3. Check the list of variables to make sure that Q9 is showing.

4. Click and hold on Q9. As soon as you move the mouse, the cursor changes to 

   ![Cursor](cursor_icon.png)

   Drag Q9 into the box above the base figure. The cursor changes to 

   ![Add](add_icon.png) to show you are adding a column. Release the mouse to build the new table.

5. To alter the table further, click 

   ![Options](options_icon.png) to display the **Results Definition** dialog box. Snap supports **Counts** and any combination of the three percentages – **Analysis Percents**, **Break Percents** or **Base Percents**. Select any of these in the **Options** field and click **[OK]**.

You can now convert the cross-tabulation into a chart.
6.4: Producing a 3-D bar chart

1. Click to display the Results Definition dialog showing the definition of the table you’ve just created. It has Q2 in the Analysis field and Q9 in the Break field.

2. In the Type field, select Chart rather than Table.

3. Choose Bar 3D as the style from the drop-down list and click [OK]. A three-dimensional bar chart will be displayed.

   Frequency of visit by Age

4. To rotate the chart, hold the [Ctrl] key down and press the left mouse button.
5. The cursor changes to 🖱️. Keep the left button pressed or it will disappear again. Drag the chart round to look at it from different angles. Release the mouse and the chart will remain in the new position.

6.5: Moving the legend on the chart

1. With the cursor anywhere over the chart, right-click and select **Chart Designer** from the context menu. The **Chart Designer** dialog appears.

2. Select **Legend**.
3. Click the **Location** tab and check **Visible**.
Analyze the survey results

4. Click the radio button at the position where you want the legend to appear.

Frequency of visit by Age

Click [OK] to apply the changes.

6.6: Changing from a bar chart to another chart type
You can easily change the type of chart. There are three ways of changing the format of your charts.

- Select a different template from the Results Definition dialog
- Use the Chart Designer to make small adjustments
- Use the Chart Wizard option to quickly alter the layout.

1. Open the window containing the bar chart from the previous section if it is not already open.
2. Right-click to display the context menu and then select the Chart Wizard option.

3. Select a chart type from the Gallery dialog. For simplicity, produce a 2-D version of the 3-D chart. Select the 2-D radio button at the top of the dialog and make sure that Bar is selected. Click [Next].

4. With the Style dialog displayed, select any of the layouts from the list. For this tutorial, select option 1.
5. Click [Next>] to see the Layout options. You do not need to change them.

6. Click [Next>] to display the Axes options. You do not need to change them.

7. Click [Finish] to build the chart and return to the Results window in Snap.

6.7: Saving and retrieving tables and charts

Any analyses that you’ve defined can be saved with the survey, so that the next time you access the survey they are automatically updated to reflect any new respondents that have been added.

1. To save an analysis you have created, click ✓ in its window toolbar.

2. If you do not wish to save it click ✗.
3. To view your saved tables and charts, click \( \text{View | Results} \).

The **Results** window displays the list of saved analyses. Select the one you wish to look at and double-click on it to open it.

There are several different layouts of tables and charts in the Crocodile survey, many with added images and color schemes.

You can upload analyses to Snap WebHost so that they can be seen over the Internet. They are then automatically updated as soon as a response is received.
7: Access an online customer panel with Snap WebHost

There’s often a requirement to link a survey with a database containing information that might be relevant to the survey, for example, a Customer Panel of people who’ve signed up to take part in regular surveys. This database might hold a unique login code for each member of the panel, together with information about the panel member such as gender, age, address etc. You can avoid asking demographic questions by holding such information in an external database, as Snap can use the information directly.

This section shows how this works in Snap. It assumes you have access to Snap WebHost. You will:

- Create a simple database using Excel.
- Modify the questionnaire created earlier, to include a login code.
- Link the survey to the database and create email invitations for your panel
- Publish the questionnaire and upload it to Snap WebHost.
- Carry out the survey from Snap WebHost.

7.1: Create a customer panel

The database displayed is a simple Excel spreadsheet and contains just 2 fields – an email address that can be used as a Login ID and a mailing address that can be imported into the questionnaire, enabling the panel member to check it and update it as necessary. Other fields such as Date of Birth,
Gender etc could be included in such a database. For the purposes of this demo, we’ve created the XLS and named it as *Customer Panel.xls*.

<table>
<thead>
<tr>
<th></th>
<th>User ID</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td><a href="mailto:jsmith@hotmail.com">jsmith@hotmail.com</a></td>
<td>345 Buzzell Road, Chicago, IL 60444</td>
</tr>
<tr>
<td>3</td>
<td><a href="mailto:tomhutton@msn.com">tomhutton@msn.com</a></td>
<td>1522 Main Street, Sycamore, IL 60144</td>
</tr>
<tr>
<td>4</td>
<td><a href="mailto:daviddavis@gmail.com">daviddavis@gmail.com</a></td>
<td>3211 Bow Street, Portsmouth, NH 60333</td>
</tr>
</tbody>
</table>

When the panel member logs into the survey on Snap WebHost, the email address they have used to log on is checked against the data from the Customer Panel database. If it is valid, they will see their mailing address in the *Address* field of the questionnaire.

**7.2: Add a login Id to the questionnaire**

1. To add a login ID to the questionnaire, click on ![Questionnaire Properties](image.png) to display the **Questionnaire Properties** dialog box. Scroll down the options on the left to locate the **Paradata** section. Once selected, highlight the **Respondent** field and check the box marked **Use in survey**. Press **[OK]** to return to the questionnaire.
Access an online customer panel with Snap WebHost

(If a dialog box should appear reporting that the questionnaire is locked, press [OK] to unlock the questionnaire and continue editing.)

2. The **ID.name** field will appear at the beginning of the questionnaire.

3. Select the **ID.name** field and using [Ctrl] + [ ], move it to just below the sub-title field entitled “Please help to...”

4. Although Snap gives a name to each variable, you do not need to show the name on the questionnaire. Highlight the **ID.name** field, and select the **Show** toolbar option.

5. Select **Name** in the next dropdown list and uncheck the **Show** box. The **ID.name** will be hidden, leaving the text for the login.
6. Change the default text to “Please enter your email address”.

Please help us to continue improving the standards in our restaurant by answering a few simple questions.

Please enter your email address

7. To add a question relating to the mailing address field in the Customer Panel database, highlight the current Q1 and click to add a new question numbered Q1. Snap automatically renumbers all the existing questions from Q2 onwards.

8. From the toolbar list, change the question style from Multi choice to Open Ended and type in a question text of “Is this your correct address? (If not, please update it)”.

9. Click on Q2 and press [Ctrl] + [S] to insert a page break above this question.

10. Save your changes to the questionnaire by selecting the icon in the Questionnaire Design window.

If a dialog box should appear reporting that the questionnaire is locked, select [Yes] to unlock the questionnaire and continue editing.
7.3: Link the survey to the customer panel

Now you've included both an ID field and a mailing address field, you can link the contents of the Customer Panel database to fields within the Snap survey.

1. Click the **Data Entry** button on the main Snap toolbar to open the **Data Entry** window.

2. Select **File|Database link** to open the **Database Linkage** dialog.
3. Click [New...] to start the Database Linkage Wizard.

4. Select Online Survey as the Linkage Type and press [Next>].
5. Click on **[Select Database File]** to locate your XLS *Customer Panel*. Once selected, click **Open**.

6. The **Database Linkage Wizard** reappears so you can specify the **Table** to use. It automatically chooses the most likely one (in this case, *Customers* of the Excel spreadsheet). Once you've selected the correct details for your database, press **[Next>]** to continue.

7. Check the **Send Email Invites** box so you can invite your panel members to take part in the survey.
8. Check the **Login with optional password** and **Seed Data**. This will allow the email login to be recognized and the mailing address information for each email address to populate the questionnaire.

![Select the options for your online survey]

For the Login, select the right-hand drop-down and select the **User ID** in the database.

For the purposes of this demonstration, no password is required.

9. Click **[Next>]** to see the email invitation dialog.

10. Set the email address field to Address (unique values) in the drop-down list if it has not been selected automatically.
11. Type the subject heading of your email in the first box and type the email message in the large box. Use the [Insert...] button to insert a Survey Location. This will be replaced with a link when the message is uploaded to Snap WebHost.

If you want to create a reminder email to be sent to people who have not responded, click the Reminder tab and create a Reminder email message in the same way.

13. The final dialog box links the fields in the database to the fields in the questionnaire. On the left of the dialog box are the fields in the database. For the field marked Address, click on the equivalent box on the right and a drop-down list of Snap questionnaire fields will be displayed. Select Q1- Is this your correct address? and press [Next>].
14. The task is complete once a unique name has been provided for this database link. Enter **Panel of Respondents** and press [Finish] to close the wizard.

![Database Linkage Wizard](image)

15. With the task complete and the **Database Linkage** dialog box showing **Panel of Respondents**, press [Close] and then select the **Questionnaire** button in the main Snap toolbar to return to the questionnaire.
16. The final step is to select **Questionnaire Properties** icon ![Icon](snap) and access the Data link option from the left-hand list to select the **Panel of Respondents** as the **Database link** to be used for the survey. Pressing the [OK] button will return you to the **Questionnaire – Design Mode** window.
7.4: Upload the survey to Snap WebHost

Snap WebHost will provide each respondent with a login screen and display the full questionnaire when the respondent logs in.

1. Publish the survey as you did in Publishing the questionnaire (see page 27)

2. Log into your Snap WebHost account via the Snap website (www.snapsurveys.com/login) if you are not still logged in.

3. The survey list appears.

4. Because you have made changes to the number of variables in the survey, you should load the survey as a new survey. (If you had just made changes to how the survey looked, you could use the Reload option).

   Click **Upload a new survey** to open the **Upload new survey** dialog.

5. Browse for the zip file for the survey and then click **Upload Archive** to upload the new version of **Quick** survey from your PC to Snap WebHost.

6. When Snap WebHost has uploaded the survey, the **Close** dialog will appear and will confirm that the survey has been uploaded under the name **snquick_1** (since you have already uploaded a survey called **snquick**).
7. The list of surveys will be updated.

7.5: Test the survey login

It is worth testing the survey to confirm that the login works as expected.

1. Click on the Summary tab for the survey. Note that 3 respondents have been uploaded.

2. Click on the Test URL for the survey.
3. The survey will start and display the login screen requesting an email address.

4. Enter one of the email addresses from the spreadsheet. When a valid email address has been entered, the current mailing address appears.

5. From there all the other questions on the questionnaire will be displayed.
Any data captured when testing the survey with the Test option will be kept in a separate data file from the file containing the replies from the respondents.

7.6: Set up the survey and make it available

1. Select the Setup tab.

2. Uncheck the Allow multiple responses box to limit each respondent to completing the survey once.

3. Add start and end dates if you wish to limit the duration of the survey.

4. Save your changes by clicking [Save].

5. Go to the survey Summary tab and start the survey.

You can view analyses on SnapWebHost in the same way that you can view them on your PC. Setting up the analyses is not covered in this short introduction, but you can find full details...
in the section "Data Analysis with Snap WebHost" in the Snap 10 User Manual and online help).
8: Create a paper version of the survey

You may be distributing your survey via the web, but a paper version of the same survey can also be very useful. You can mail a paper version to any respondents who do not have access to the internet.

A printed paper version of the questionnaire is also easier for colleagues to comment on the contents of the survey, and is an easy way to present printed results.
8.1: Setting up the design for the paper version

Open your survey in Questionnaire - Design Mode window using the button.

1. Click the Editions and Style Templates button to display the Editions and Style Templates dialog.

2. Click [New...] to create a new edition, and in the Publication Medium field, select Paper.
You may be asked if you want to alter the page size of the questionnaire to match your current printer.

3. Select **Load Style** to choose a new style for the layout of the paper questionnaire. Select Default.qsf from the drop-down list to access the template for a paper survey. You can also browse for style files by clicking the button.

4. Click **[OK]** to close the **New Survey Edition** dialog.

5. Click **[OK]** to return to the **Questionnaire – Design Mode** window.

Snap creates a new tab entitled Paper:Keyed to display the paper version of the same questionnaire.

Although Snap creates a single database to store the structures of your questionnaire, you can make changes to editions of the same questionnaire:

- Certain questions can be hidden...
- Other questions can be phrased slightly differently.
- Page breaks can be placed in different places for different types of surveys.
- An entire questionnaire can be presented in a different language.

There is insufficient time within this Guide to show all these particular capabilities, but we will remove the page breaks set up for the web survey, so that the questionnaire will fill a full printed page.

6. Click anywhere in the text of **Q2** to select it. Press [Ctrl] + [S] and the page break will disappear. (Pressing [Ctrl] + [S] again will put the page break back.)
7. Now remove all the other page breaks in the same way.

8. To publish and print your paper questionnaire, select File|Publish or click the Print Preview button. 

   A dialog may appear if you’ve altered the questionnaire asking you to select [Yes] to keep the changes or [No] to ignore the changes.

The **Printing Options** dialog appears. It has a [Publish] button if you have selected File|Publish, and a [Print] button if you have gone through the print preview.

9. To print a single proof copy, click [Publish]. Once you have proofed and checked your questionnaire, you can print multiple copies by clicking the [Number of Copies...] button.
8.2: Enter the replies from the paper questionnaire

1. From the **Survey Overview** window, open the **Quick** survey, i.e. the survey that you created at the beginning of this tutorial.

2. Click the **button on the main toolbar to open the **Data Entry** window.

3. Click the **button on the **Data Entry** window toolbar to switch to **Questionnaire Mode**. The window title should be **Data Entry - Questionnaire Mode (Test Case)**.

4. Click the **button to tell Snap that you wish to enter data for a new case. The text just below the button should change from **Test Case** to **New case 1 of 1**.

5. Click on the code boxes for **Pizza**, **Salad** and **Soft drink**. A tick will appear in each box. If you accidentally clicked on one of the other boxes then simply click that box again to remove the tick.
6. Press [Enter] to move to the next question. In this case the next question is question 1a, asking for other foods bought. Type Apple Pie and press [Enter] to move to the next question. If you press [Enter] without entering a reply, a warning message appears. Click [Yes] to continue.

7. In the grid question, you can also use the keyboard. Press [1] to select the first code when the question is selected. Press [Enter] to move to the next part of question 2 and enter another response (1, 2, 3, 4 or 5).

8. Press [Enter] to move to the next question. Note that the routing functions here too. If you selected Poor for Q2c, you will be taken to Q3 What would you expect to pay. If not, you will be taken to the open-ended Q4.

9. Enter appropriate responses (a comment such as The food was cold) and press [Enter] after each question.

10. When you have completed the questionnaire you are given the options:

11. Select [Continue] to save the data and move on to Case 2.

12. When you have finished the last case, select [End] and all the data will be saved.
By default, you must press [Enter] after each completed reply in Snap. This is a safety setting for new users. Experienced users can tailor Snap so that the [Enter] key is not required after each reply and the software moves from one field to the next as a valid reply is keyed in. To do this, open the Tailor | Data Entry dialog and select Continuously instead of Individually.

You’ve now completed your whistle-stop tour of Snap, and in a short time, you’ve designed and published a survey and analyzed the results. Now you’re ready to go.
9: Improving response rates

It’s generally agreed that the advantages of web surveys are:

- They can provide a faster response than more traditional methods.
- They can be less expensive to administer.
- They can be more attractive to complete than paper surveys.

It’s also generally agreed that the disadvantages of web surveys are:

- Overall response rates are often no higher than other methods if no reminders are sent out.
- The costs of design are often higher than paper based surveys because so much more can be done with a web survey in terms of layout, colors, images etc.
- Web surveys do require computer access, and although internet access is improving across all nations, there can still be disadvantaged groups who might be excluded by using surveys only available on the web.

For many years, the cynics of online surveys always quoted low response rates as a reason for remaining with the more traditional methods of paper and telephone surveys. However, these comparisons were often made between paper or telephone with reminders against online surveys without reminders. When reminders were incorporated into online surveys, very similar response rates to paper or telephone were achieved. With online reminders becoming increasingly
automated, online response rates will increasingly be comparable with the more conventional techniques.

There are a number of techniques for improving response rates. They include:

- Reminders
- Incentives
- Improving the online experience

9.1: Reminders

Online reminders are available as an option with SnapWebHost but it is highly recommended that the feature is always used and used regularly. There is no point in launching the survey and then simply issuing a reminder after one month. It is important to plan out regular reminders and to ensure that the message is varied – not just a one sentence reminder but one that stresses the importance of completing the questionnaire and the benefits from doing so. As the project reaches the closing date, the message should become increasingly stronger, but stop short of begging!!

9.2: Incentives

Incentives are a tried and tested method of increasing response rates within commercial market research. If it is appropriate and legal to do so, you can use them in web surveys in both the private and public sectors. Many incentives can be very cost effective, and may be as simple as a Prize Draw. The prize might be a discount on products and services offered by your organization. Alternatively it might be a “desirable” product such as an Apple iPod or a memory stick. Make sure that the prizes will work in other countries if the
Improving response rates

survey is international, and that they're not too expensive to deliver by mail or courier.

9.3: Improving the online experience

When researchers design paper questionnaires, they usually take great care to ensure that they are inviting to complete. Perhaps it is the cost of printing and reprinting that motivates researchers into “getting it right”.

We’ve all been faced with online surveys that have been poorly designed. We may put it down to the fact that they’ve been designed by non-researchers, but it’s often the case that too little design thought has been given. Perhaps it’s the thought that it can always be changed if it’s wrong or not clear. This is no defense. More care should be taken to design online questionnaires. All too often, there are no explanations on how and why to complete the questions. Make sure you allow yourself enough design time to consider layout, colors and images, and ensure that online surveys are easy to complete.