

Basic Designer

By Michael Rahija

Outline

1. Create a new questionnaire or clone an old one
2. Questionnaire Structure
3. Question Fields
4. Create text, numeric, date, single and multi answer categorical questions, and list
5. Enablement conditions
6. Static Text

Learning Objectives

- Know how to create a questionnaire
- Know the major question types (text, numeric, date, single and multi answer, list)
- Understand the concept for enablement conditions
- Be familiar with the fields to be completed for questions
- Know about static text

1. Create a new questionnaire or clone an old one



Survey Solutions Designer

This is a tool for creating surveys for
The World Bank's CAPI platform with
collaboration capabilities and export to PDF.

Welcome to Survey Solutions Questionnaire designer

Please log in or [Register](#)

michael_rahija

.....

☐ Stay logged in for a day

[LOG IN](#)

[FORGOT PASSWORD?](#)

My Questionnaires x Michael

World Bank Group [US] https://solutions.worldbank.org

Apps R ODK World Bank Misc Stats Project MGMT SCRIGNO Internet B... GS Website CS Intranet: Adminis... global.strategy@gsa... SelectorGadget

Questionnaire Designer

MY QUESTIONNAIRES PUBLIC QUESTIONNAIRES **CREATE NEW**

HELP CHANGE PASSWORD LOGOUT

TITLE Q X

	LAST MODIFIED	CREATED DATE	CREATED BY	
DURBAN_LSMS_HH_demo4Michael	5 May, 09:49	28 Jan, 13:38	opm	ACTION ▾
Tester	16 Jan, 08:27	16 Jan, 07:38	you	<div>Edit Clone Export as PDF</div>
Agricultural census	16 Jan, 03:41	17 Jul, 09:01	you	
CROP - Test - Questionnaire	14 Apr, 04:17	13 Apr, 05:28	you	ACTION ▾
ARDS_Tanzania MONTHLY	13 Apr, 08:57	11 Apr, 06:08	you	ACTION ▾
Test questionnaire	10 Nov, 16:56	15 Jul, 08:31	you	ACTION ▾
Socioecon chara hh italia	10 Nov, 17:27	31 Oct, 04:11	you	ACTION ▾
Test Questionnaire	10 Nov, 17:26	28 Oct, 04:55	you	ACTION ▾
CENSUS_Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test	18 Mar, 10:01	17 Mar, 12:42	you	ACTION ▾
Rapid Assessment of the Tanzanian Animal Health Service Delivery System - Extension workers_test	18 Mar, 04:08	17 Mar, 11:14	you	ACTION ▾
Geo Reference test	27 Apr, 10:43	27 Apr, 10:42	you	ACTION ▾
INTEGRATED LIVING CONDITIONS SURVEY - Armenia	29 Apr, 10:24	29 Apr, 07:46	you	ACTION ▾

Questionnaire Designer

MY QUESTIONNAIRES

PUBLIC QUESTIONNAIRES

CREATE NEW

HELP

CHANGE PASSWORD

LOGOUT

Create New Questionnaire

This is a test questionnaire

☐ Is Public

CREATE

CANCEL

BACK TO LIST

- Title mandatory
- Private unless you flag public
- Click "Create" to create new questionnaire

2. Questionnaire Structure

Designer : Questionnaire structure

- **Two panels**
 - **Left panel** provides structure showing questions, subgroups, rosters, etc.
 - **Right panel** contains fields to create and edit questions.
- In designer (new, and drafted):

D

New Features
(0Q, 1S, 0R) COMPILE

≡

\$m

📄

📎

New Section

ADD QUESTION

ADD SUB-SECTION

ADD ROSTER

ADD STATIC TEXT

ADD VARIABLE

ADD QUESTION

ADD SUB-SECTION

PASTE

This section is empty.

ADD QUESTION

 and

ADD SUB-SECTION

 buttons on top of this block or manage sections with

≡

 left panel

Language of survey, device types, collaboration and other options can be found at

SETTINGS

 panel (top right corner)

HISTORY SETTINGS HI, MICHAEL_RAHUJA ▼

Title

New Section

SAVE

CANCEL

DELETE



Holding Questionnaire



- Is %rosteritle% the holder, the joint holder or the manager of this agricultural holding? M4_Q12
- Does %rosteritle% participate in taking decisions concerning crops and livestock (e M4_Q13
- Did %rosteritle% help/work on the holding/farm during the last 3 months? M4_Q14
- Did %rosteritle% answer for himself/herself ? M4_Q15
- Who answered the questions regarding %rosteritle% M4_Q16

LABOR OVERVIEW

- Overall, how many Household members have been working in the household's holding in M5_Q1a
- Overall, how many permanent workers have been working in the household's holding in M5_Q1b
- Overall, how many temporary workers (seasonal/short-term/casual workers) have been M5_Q1c
- Overall, how many Household members have been working in the household's holding in M5_Q1d
- Overall, how many unpaid family members have been working in the household's holding M5_Q1e
- Overall, how many other unpaid helpers (eg., unpaid trainees, volunteers) have been wo M5_Q1f
- Have you hired contractors in the past 3 months? M5_Q2
- How would you rate MONTH X regarding the amount of agricultural work? M5_Q3
- How would you rate MONTH X-1 regarding the amount of agricultural work? M5_Q4
- How would you rate MONTH X-2 regarding the amount of agricultural work? M5_Q5
- Would you have needed more workers during the peak season? M5_Q6
- Which type of workers did you need? M5_Q7
- What was the main reason for not having enough workforce? M5_Q8
- How did the labour shortage affect your farming activity? M5_Q9
- If other, please specify M5_Q9_oth
- Note down relevant open comments on labour use in the holding M5_Q10

AB

HOLDING QUESTIONNAIRE /

Question type

Variable name(?)

AB Text ▾

Variable label(?)

Question text

Pattern (?)

ADD INTERVIEWER INSTRUCTION

● Enabling condition (?) ☐ Hide if disabled (?)

ADD NEW VALIDATION RULE

Question scope [Interviewer](#) ▾

SAVE

CANCEL

DELETE

MOVE TO ▾

Designer : Questionnaire structure

LEFT PANEL

- **Subsection** : questions that have something in common
- **Roster** - A group of questions that all relate to elements in some list (e.g. characteristics of household member listed in roster)
- **Static text** : blocks of text can be added this could be useful for example when enumerators are reading intro to respondent. See next slide:
- **Variable** – *Advanced feature*

Holding Questionnaire

☰ Confidentiality notice

HOLDING IDENTIFICATION

<u>AB</u>	In what region is the holding located?	M1_Q1
<u>AB</u>	In which district is the holding located?	M1_Q2
<u>AB</u>	In what town/village is the holding located?	M1_Q3
<u>AB</u>	What is the enumeration area?	M1_Q4
<u>AB</u>	What is the Holding Serial Number?	M1_Q5
<u>AB</u>	Who is the holder?	M1_Q6
<u>AB</u>	What is the location address of the holding?	M1_Q8
📍	Take GPS coordinate	M1_Q9_1
📍	Take GPS coordinate again	M1_Q9_2

HOLDING OVERVIEW

<u>AB</u>	Who is the holder?	M3_Q1
fix	M3_Q2	
⚙	What is your legal status as holder?	M3_Q3
⚙	The holding is	M3_Q4
⚙	Is the holder	M3_Q5
12	How old are you?	• M3_Q6
⚙	What is your highest level of completed education?	M3_Q7
⚙	Do you have a contact number?	M3_Q8
<u>AB</u>	What are your contact details?	• M3_Q9
⚙	Is there a joint holding in this holding?	M3_Q10
12	How many joint holders are in this holding?	• M3_Q11

- Static Text: not a question type
- Subsection
- Questions

Designer : Questionnaire structure

RIGHT PANEL

- **Questions** : text and entry field to capture the answer of a respondent. In designer:

Question type

AB Text

Variable name(?)



Variable label(?)

Question text

Pattern (?)

ADD INTERVIEWER INSTRUCTION

● Enabling condition (?) ☐ Hide if disabled (?)

ADD NEW VALIDATION RULE

Question scope

Interviewer

SAVE

CANCEL

DELETE

MOVE TO ▲

Will go over
each field later
in the
presentation

Designer : Questionnaire structure

- **Sections** : Kind of like schedules in paper questionnaires. In designer:

D

AGRIS Labour 4 waves - Holding

(72Q, 6S, 2R) [COMPILE](#)



Holding Questionnaire



Confidentiality notice



HOLDING IDENTIFICATION

AB

In what region is the holding

AB

In which district is the holding

AB

In what town/village is the ho

\$m



2 Sections:

Holding Questionnaire

Filter Summary

[ADD NEW SECTION](#)



M1_Q1

M1_Q2

M1_Q3

M1_Q4

M1_Q5

M1_Q6

M1_Q8

M1_Q9_1

M1_Q9_2

M3_Q1

M3_Q3

M3_Q4

M3_Q5

M3_Q6

M3_Q7


3. Question Fields

KEY CONCEPT APPROACHING!


Designer: Fields for every question

NEW SECTION / HOUSEHOLD ROSTER /

Question type

 Categorical: Single-select

Variable name(?)

 marital_status

Variable label(?)

Marital Status

Question text

What is the marital status of %rosteritle%?

1	Single	×
2	Married	×
3	Common law	×
4	Divorced	×
5	Widowed	×
6	Separated	×

[ADD OPTION](#) [SHOW STRINGS](#)

Filter

age >11

☐ Cascading combo box ☐ Combo box

☐ Is linked

[SAVE](#) [CANCEL](#) [DELETE](#) [MOVE TO ▲](#)

- Question Type*
 - Variable Name*
 - Variable Label
 - Question text*
 - Mask (only text)
 - Add Instruction
 - Conditional Expression
 - Validation expression
 - Validation message
 - Question Scope
- * Mandatory

Designer: Fields for every question

- **Question Type** : Specifies how the response is collected by application
- **Variable Name** : appears as columns in dataset
- **Variable Label** : more user friendly name to appear as label in dataset
- **Question text**: What is read to respondent

Designer: Fields for every question

- **Enablement expression:** Condition which activates the question when met. If no condition is specified, the question WILL appear. ***CAPI version of Skip pattern!**
- **Validation expression:** expression which must be **TRUE** for validation message not to appear. If not specified, any value is valid.
- **Message:** message that appears to interviewer when validation message is violated.

Designer: Question Scope

Validation message (?)

☐ Mandatory question

Question scope

Interviewer
Supervisor
Prefilled

Interviewer ▼

SAVE CANCEL DELETE CLONE MOVE TO ▲

- Question scope determine **WHO** provides the answer
- By default, the question's scope is interviewer.

Designer: Question Scope

- **Interviewer:** answers entered into questionnaire by enumerator. Most questions!
- **Supervisor:** answers can only be entered by supervisor. Example?
- **Prefilled:** Answer entered by Headquarters. The answer could be used to locate the enumeration unit. Neither Supervisor, nor Interviewer can change. ***Info from Sampling Frame**

4. Create text, numeric, date, single and multi answer categorical questions, and list

Question Type

- Different question types capture different types of information.
- Choosing the correct type is crucial to minimize mistakes
- This presentation will **cover text, numeric, date, single and multi answer categorical, and list.**
- More complex types will be covered in a later session.

Question Types

HOLDING QUESTIONNAIRE /

Question type

AB

Text

▼

8

8

Categorical: Single-select

8

8

Categorical: Multi-select

12

🕒

AB

📍

☰

📊

🖼️

Variable name(?)



[ADD INTERVIEWER INSTRUCTION](#)

☒ Enabling condition (?) ☐ Hide if disabled (?)

[ADD NEW VALIDATION RULE](#)

Question scope

Interviewer ▼

SAVE

CANCEL

DELETE

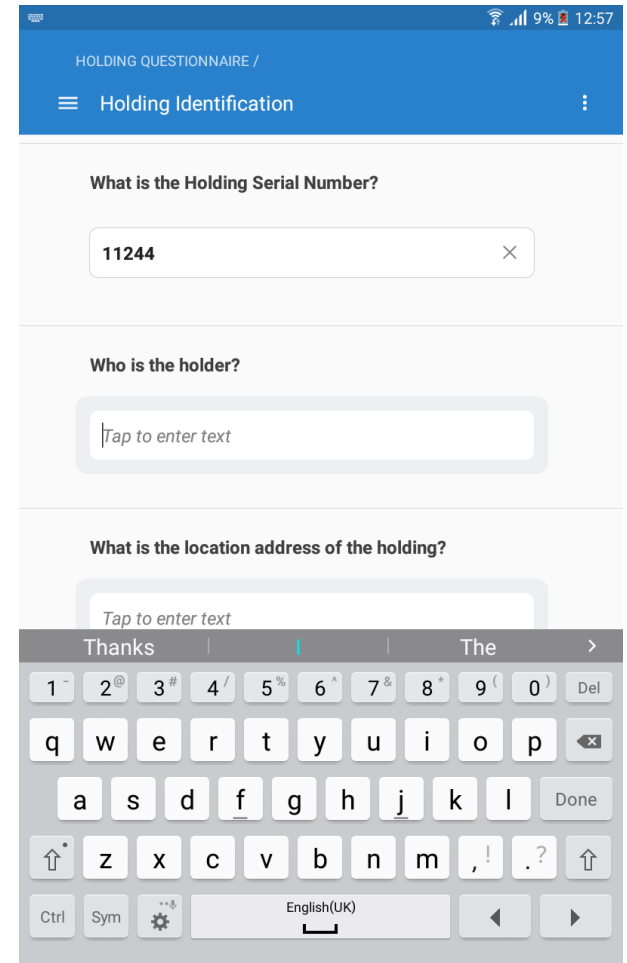
MOVE TO ▲

Text



AB Text

- Enumerator can enter anything in blank field.
Possible applications are: names, addresses, *other: please specify*



11244

Who is the holder?

Tap to enter text

What is the location address of the holding?

Tap to enter text

Thanks | The

1 2 3 4 5 6 7 8 9 0 Del

q w e r t y u i o p

a s d f g h j k l Done

↑ z x c v b n m , ! . ? ↑

Ctrl Sym English(UK) ← →

Numeric



- Captures numerical information (ex: quantities, prices, volumes, etc.)
- Can force integers
- Can limit values using validation fields
- Interviewer can only enter number in this field

Date

 **Date** 

Date of the interview

Set date

			August 2014						
			S	M	T	W	T	F	S
Jul	24	2013	31	27	28	29	30	31	1 2
Aug	25	2014	32	3	4	5	6	7	8 9
Sep	26	2015	33	10	11	12	13	14	15 16
			34	17	18	19	20	21	22 23
			35	24	25	26	27	28	29 30
			36	31	1	2	3	4	5 6

Done

- Interviewer picks a date on a calendar. Useful in capturing dates of birthdays, marriage, purchase of certain goods, etc. Probing required when exact date not known.

Categorical one-answer

A rectangular form element with a light gray border. On the left side, there is a small icon consisting of two circles with horizontal lines through them. To the right of this icon, the text "Categorical: one answer" is displayed in a dark gray font. On the far right side of the form, there is a small, light gray downward-pointing chevron icon.

- To be used when possible answer are known to belong to a certain list, and only one answer is possible.
- Examples: male/female, urban/rural, highest qualification level, etc.

Categorical one-answer

How it looks in the designer

Question text

Which is the highest level of education %rosteritle% has attained?

1	None	✕
2	Primary School	✕
3	Secondary School	✕
4	University	✕
5	Other	✕

[ADD OPTION](#) [SHOW STRINGS](#)

☐ Combo box ☐ Is linked ☐ Cascading combo box

How it looks on the tablet

Which is the highest level of education Ann has attained?

- ☐ None
- ☐ Primary School
- ☐ Secondary School
- ☐ University
- ☐ Other

Categorical multiple-answer



 Categorical: multiple answers 

- To be used when possible answers are known to belong to a certain list, and more than answer is possible.
- Examples: “Do you have any of the following items in your HH: stove, refrigerator, etc...”
- Interviewer selects items.

Categorical multiple-answer

- Can be **ordered**, or **not ordered**

Question Type

Variable name(?)

Variable label(?)

Title

Please put in order your favorite colors from least favorite to most favorite

1	Blue	×
2	Red	×
3	Green	×

ADD OPTION

SHOW STRINGS

☐ Is linked

☒ Ordered

Maximum answers count

Categorical General Features

- Precoding: Codes for categories are entered in designer, and not visible to the interviewer.

NEW SECTION / HOUSEHOLD ROSTER /

Question type
 Categorical: Single-select

Variable name(?)

Variable label(?)

Question text

1	Never been to school	✗
2	Primary incomplete	✗
3	Primary Complete	✗
4	Post-primary vocational	✗
5	Secondary incomplete	✗
6	Secondary complete	✗
7	Higher education incomplete	✗
8	Higher education complete	✗

[ADD OPTION](#) [SHOW STRINGS](#)

Filter

[SAVE](#) [CANCEL](#) [DELETE](#) [MOVE TO](#)

- Preloading long lists of responses, and ‘filtering’
- Uploading .tab
- Linked can take list from another question

Categorical General Features

- Many times on PAPI, there will be an option for “Other (please specify)”.
- How might this be implemented in CAPI?
- Solution:
 - Add “Other”, and give code
 - Create new text question that activates when “Other” is selected for the previous question.

List Questions

- It is used when the number and values are not known by questionnaire designer.
 - Examples: Names of HH members, favorite movies, etc.
- The number of items cannot be larger than 40
- Many times used as TRIGGERS for rosters. This will be covered later.

List Questions

- Tap to enter new item

The screenshot shows a mobile application interface for a questionnaire. At the top, a blue header bar contains the text "HOLDING QUESTIONNAIRE /" and "Household member roster: Demographic characteristics and education". Below the header, a instruction reads: "Make a list of all the individuals who normally live and eat in this household, starting with the household head". A text input field contains the name "Joe" with a clear button (X) on the right. Below the input field is a button labeled "Tap to enter new item". A blue button labeled "Household member roster - Joe" is positioned below the input field. Below this button, the text "Section not started" is displayed. At the bottom of the screen, a blue button labeled "TO PARENT" is visible. The bottom of the screen shows a virtual keyboard with the text "Thanks" and "The" entered, and a "Done" button.

5. Enablement conditions

Enablement conditions

- PAPI = Skip Patterns
- CAPI = **Enablement** conditions
- Instead of questions being skipped, questions are simply either **enabled** or **disabled** based on the answer to previous question

Data validation: Building expressions

- Two questions are involved:
 - **Unleash** question: Used to enable a question.
 - **Recipient** question: question that must adhere to the conditions.

Enablement conditions

- For example, suppose you have the gender of a person collected in a variable named 'gender' and a question asking if the HH member has ever been pregnant collected in variable 'pregnancy'.
- Gender is coded 1 "male" and 2 "female"
- Clearly you want to only **enable** the pregnancy question for **females**.
- To do this use the conditional expression.

Enablement conditions

	Make a list of all the individuals who normally live and eat in this household, starting with the household head	Sex	Age in complete d years	What is the relationship of [NAME] to the head of the household?	What is [NAME'S] marital status?	Is [NAME] able to read and write in [OFFICIAL and/or LOCAL LANGUAGE]	Has [NAME] ever attended school?
	M4_Q1	M4_Q2	M4_Q3	M4_Q4	M4_Q5	M4_Q6	M4_Q7
<i>filter</i>	ALL	ALL	ALL	ALL	ALL	If M4_Q3>5	If M4_Q3>5
<i>Coding categories</i>	NAME	1 - Male 2 - Female		1 - Head 2 - Wife/husband 3 - Child / adopted child 4 - Grandchild 5 - Nice / nephew 6 - Father / mother 7 - Sister / brother 8 - Son/daughter in law 9 - Brother/sister in law 10 - Grandfather/grandmother 11 - Father/mother in law 12 - Other relative 13 - Servant / servant's relative 14 - Lodger / lodger's relative 15 - Other non-relative	1 - Married 2 - Consensual Union 3 - Separated 4 - Divorced 5 - Widowed 6 - Never Married	1 - no 2 - read only 3 - write only 4 - ready and write	1 - Yes 2 - No
1							
2							

Recipients

Unleash

Enablement conditions

Skip Patterns

☰ Do you speak any foreign languages? language

☰ Which foreign languages do you speak? foreign_languages

ADD QUESTION ▾

PASTE

SKIP PATTERNS /

Question type

☰

Categorical: Single-select ▾

Variable name(?)

🔗

language

Variable label(?)

Speak Foreign Language

Question text

Do you speak any foreign languages?

1	Yes	✕
2	No	✕

ADD OPTION

SHOW STRINGS

☐ Cascading combo box

☐ Combo box

☐ Is linked

ADD INTERVIEWER INSTRUCTION

● Enabling condition (?)

☐ Hide if disabled (?)

ADD NEW VALIDATION RULE

SAVE

CANCEL

DELETE

MOVE TO ▴

Enablement conditions

New Features
(2Q, 1S, 0R) [COMPILE](#)

[HISTORY](#) [SETTINGS](#) [HI, MICHAEL_RAHUJA](#) ▾

Skip Patterns

Do you speak any foreign languages?

Which foreign languages do you speak?

foreign_languages

ADD QUESTION ▾

PASTE

SKIP PATTERNS /

Question type

Categorical: Multi-select ▾

Variable name(?)

foreign_languages

Variable label(?)

Spoken foreign languages

Question text

Which foreign languages do you speak?

1	English	×
2	Hindi	×
3	Spanish	×
4	German	×

ADD OPTION

SHOW STRINGS

☐ Record answer order

Max number of answers

☐ Yes/No mode

☐ Is linked

ADD INTERVIEWER INSTRUCTION

☒ Enabling condition (?) ☐ Hide if disabled (?)

language == 1

SAVE

CANCEL

DELETE

MOVE TO ▴

Unleash

Recipient

Enablement conditions

Question type
☐ = **Categorical: Single-select**

Variable name(?)
\$

Variable label(?)

Question text

1	Married	✗
6	Living together like husband and wife	✗
2	Divorced	✗
3	Separated	✗
4	Widowed	✗
5	Never Married	✗

ADD OPTION

SHOW STRINGS

☐ Combo box ☐ Is linked ☐ Cascading combo box

ADD INTERVIEWER INSTRUCTION

Enabling condition (?)

MAIN RESPONDENT (ROSTER) / HOUSEHOLD MEMBER / BACKGROUND /

Question type
☐ 12 **Categorical: Single-select**

Variable name(?)
\$

Variable label(?)

Question text

1	Yes	✗
2	No	✗

ADD OPTION

SHOW STRINGS

☐ Combo box ☐ Is linked ☐ Cascading combo box

ADD INTERVIEWER INSTRUCTION

Enabling condition (?)

UNLEASH QUESTION

RECEPIENT QUESTION

Enablement conditions

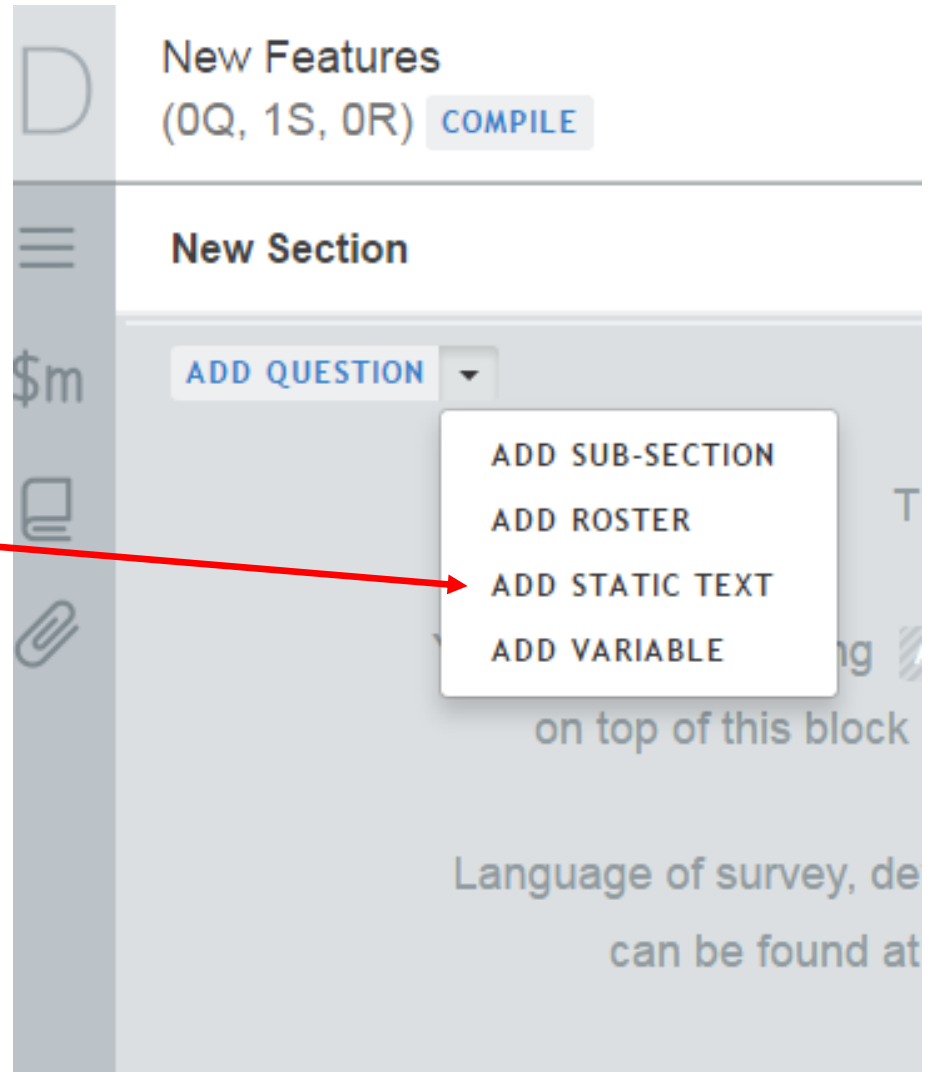
- Enablement conditions are written in C#. They are quite flexible and can take into account the response in many questions.
- Don't be scared, they're about as difficult as basic excel formulas.
- We will have a specialized presentation on the syntax of validation, and conditional expressions.

Enablement conditions

- CAN YOU THINK OF OTHER EXAMPLES?

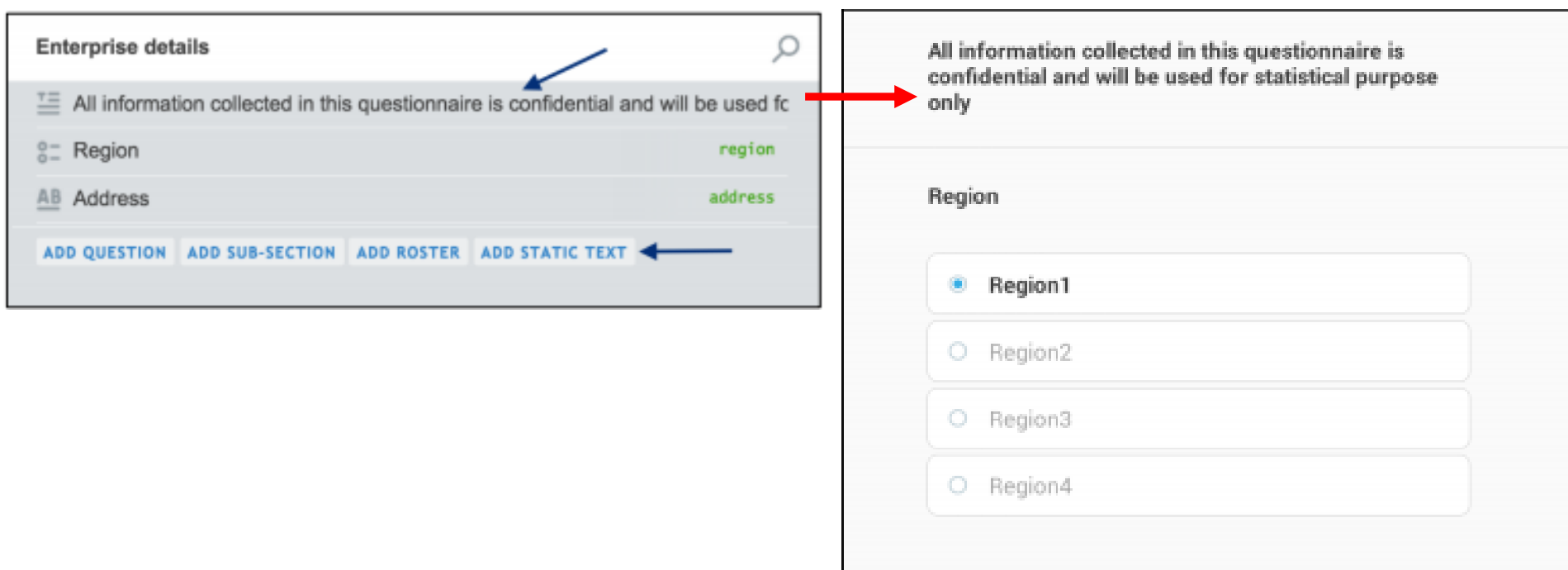
Static Text

- Static Text is used to convey information to the enumerator or the interviewee.
- Create static text by selecting “Add Static Text” from the drop-down menu.



Static Text

Static text appears on the tablet in the same position as in the designer.



Review LOs

- How to create a questionnaire
- Major question types (text, date, single and multi answer, list)
- Be familiar with the fields to be completed for questions
- Understand the concept for enablement conditions
- Know about static text

Q&A