

QPSMR Input and Telin 2011.2

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User Guide

Introduction to version 2011.2

Welcome to the documentation for QPSMR Input and QPSMR Telin.

These are the two programs from the QPSMR suite that are used for entering and verifying market research questionnaires.

These programs are authored by NetMR Ltd, see www.netmr.eu.

The main dealer for these programs is QPSMR Limited, see www.qpsmr.org.uk.

Recent changes

- Version 2011.2
For new projects with the relevant ZZZUN entries, the Windows login names are stored instead of user numbers and you will no longer be asked for your number/name when starting Input or Telin.
- Version 2011.1
Only minor bug fixes in this version.
- Version 2010.2
Filters can be stored in the data.
Suspended questions do not appear in verify mode.
- Version 2010.1
Randomization improved.
- Version 2009.2
Character questions can be up to 2000 characters wide.
- Version 2009.1
Program restructured for faster startup.
- Version 2008.2
Uses TAPI version 2.1 (earlier versions used TAPI 2.0).
- Version 2008.1f
CATI TAPI line errors can be requested from View options dialog box.
- Version 2008.1
Up to 999 card types are allowed.
Record lengths up to 130,000 are allowed.
- Version 2007.2
Up to 314 card types are allowed.

Ability to read a Unicode QDF.

New "suspend" setting for questions and responses that are unavailable in Input mode, but are visible in other modes.

- Version 2007.1

Response lists can be up to 9999 long. Response lists over 999 will need 4 digit input codes.

- Version 2007.1 (CATI only)

The verify difference correct dialog for character questions has been improved.

A new Dial and Wait button that waits 30 seconds for an answer before hanging up.

- Version 2006.1 (CATI only)

If a questionnaire is aborted (F12), the "failed" dialog box with the list of reasons for failure appears before, or instead of, QEND4.

- Version 2006.1

The program and file type icons have changed.

- Version 2005.2 (CATI only)

The TELNUM telephone number is copied to the clipboard when a record is retrieved from sample. It can be pasted into a dialer that is not TAPI 2 compliant (for example VOIP).

- Version 2005.2

The data for a record is listed on the "End of interview" dialog box as well as the "Suspended interview" dialog box.

Main features

These programs comply with relevant market research quality standards.

They run under Microsoft Windows 98, ME, 2000, XP, 2003, Vista and 7. They are written in C++.

Entry is accomplished using keyboard or mouse and the user can employ either method at any time.

Data is fully validated during entry. Once data has been entered it is "clean" and ready to use.

Entry will skip past unwanted questions (sometimes called filtering or routing) and randomization of questions and responses is possible (not in paper mode).

Data is stored in market research standard formats with a choice of fixed format character or binary.

Partially completed questionnaires can be saved and recalled for completion.

Multiple users can enter data simultaneously to the same data file on a central server.

Important notes for users

When starting a project you may get a warning that the size of ZZZQFE and ZZZLQN needs to be increased.

You can safely ignore this message for old project files created with versions 2004.1 and earlier, but all new projects should have been set up with both these entries set to width 30. Please inform the person who supplied the project files if you get this message.

You may also get a message showing a version number followed by "This project was created with the above version of the software". This means that the software you are using is out of date and you should obtain a later release. You should not use the project files with your old version without checking that this is OK with your supplier.

You should always be using the latest version of QPSMR Input or QPSMR Telin. The latest version will work with files generated by earlier versions of QPSMR Insight and QPSMR CATI.

For more information please contact your supplier, or QPSMR Limited at www.qpsmr.org.uk or by phone from the UK on 01491 825644 or +44 1491 825644 from elsewhere.

QPSMR Input

The QPSMR Input program is available to anyone who wishes to enter data into a pre-defined QPSMR questionnaire. It is ideal for use by in-house data entry staff, home workers and companies who provide a data capture service.

It is free of charge for use with project files produced by a licensed copy of QPSMR Insight or QPSMR CATI.

Copies may be downloaded, free of charge, for use with project files produced by a licensed copy of QPSMR Insight or QPSMR CATI, from www.qpsmr.org.uk or www.netmr.eu

The www.qpsmr.org.uk website also contains a QPSMR Input overview, in the form of easy to follow user notes, which can be printed as required and some example files.

QPSMR Telin

QPSMR Telin is a similar, but licensed, input program that enables data entry whilst conducting an interview "live" over the telephone with the respondent. If "Telephone" has been selected as the entry mode, then QPSMR Telin is needed instead of QPSMR Input to enter the data. The interviewer is able make appointments with QPSMR Telin.

For full CATI (Computer Assisted Telephone Interviewing) facilities, such as Sample Management and Quota Control, the project files must be created with QPSMR CATI.

This version of QPSMR Telin will work with files generated by earlier versions of QPSMR Insight and QPSMR CATI, except that the sample index file may have to be rebuilt if the project files were generated prior to version 2004.2.

QPSMR Telin includes all the facilities in QPSMR Input and can be used for any input mode. If you have QPSMR Telin installed then you do not need QPSMR Input. If you wish, you may install QPSMR Input and QPSMR Telin on the same computer.

Starting input

Program installation

Before data entry can begin the software needs to be installed.

QPSMR Input will normally be downloaded and installed from www.qpsmr.org.uk or www.netmr.eu. Please follow the instructions on the website.

A QPSMR Input overview, in the form of easy to follow user notes, is also available from www.qpsmr.org.uk.

QPSMR Telin is licensed and will normally be emailed to you as an MSI file. This is a Windows Installer file and opening it should begin the installation. If your email security system would remove MSI files it may be sent with XMSI as the extension. You will need to rename the file after saving it on your hard drive to remove the X from the name.

Please keep a safe copy of the MSI file in case you need to re-install at a later date. For PCs connected to a server, the MSI should be placed on the server so that it can be installed from there to each PC.

Project files installation

The input program requires a number of files to function correctly.

If the project files have been emailed to you, they will probably be in a compressed (zipped) file. You will need to "extract" the files to a folder on the hard drive before use. We recommend using a separate folder for each project. These project folders will normally be created under the **C:\My Projects** folder.

It is important to know exactly where the project files have been placed.

For a list of files needed for data entry and their names, see section [File types](#).

Starting the program

To begin entering data with QPSMR Input, select [QPSMR Input *version*] from your Windows desktop or [Start] [Programs] [QPSMR Input *version*]. The *version* will be the version you are using, for example 2006.1.

To begin entering data with QPSMR Telin, select [QPSMR Telin *version*] from your Windows desktop or [Start] [Programs] [QPSMR Telin *version*]. The *version* will be the version you are using, for example 2006.1.

Opening the QIF

One of the project files is called the Input Control file and has the extension QIF. This is the file that is opened first.

When the program is started up you see the "Open QPSMR Input file" dialog box, where you should choose the appropriate folder and then open the Input Control file (QIF) you require.

When starting a project you may get a warning that the size of ZZZQFE and ZZZLQN needs to be increased. You can safely ignore this message for old project files created with versions 2004.1 and earlier, but all new projects should have been set up with both these entries set to width 30. Please inform the person who supplied the project files if you get this message.

You may also get a message showing a version number followed by "This project was created with the above version of the software". This means that the software you are using is out of date and you should obtain a later release. You should not use the project files with your old version without checking that this is OK.

You should always be using the latest version of QPSMR Input or QPSMR Telin. The latest version will work with files generated by earlier versions of QPSMR Insight and QPSMR CATI.

Changing the default project folder (optional)

If your project files are not normally stored in **C:\My Projects** then you may wish to change the default location for project files -

- Start the program

- Open a valid Input Control (QIF) file
- Select [Test input]
- If you cannot see the menu at the top of the data window -
 - Hit the F9 key to see the "View options for data" dialog box
 - Check [Menu] (at the top of the dialog box)
 - Close the "View options for data" dialog box
- Select [Options] [Projects folder]
- Choose a new folder for project file searches

This procedure saves the folder name in the Text Document (TXT) file **C:\My Projects\InilInput**. This file can be edited directly with WordPad and can be copied from PC to PC if needed. The "New projects" folder is the starting point for opening a QIF when the program is started.

The Comma Separated Value (CSV) file called **User Numbers** is stored in the projects folder. You will need to move this file to the new folder selected if user numbers have already been allocated.

Station number

The first time you open a project you may be asked to enter a station number. This number is stored in a Text Document (TXT) file called **C:\My Projects\IniStn**. The station number will usually be recorded with data entered on this PC.

Tip: The Data window shows the station number at the bottom. If it is not displayed correctly please tell your supervisor.

User number

You will usually now be asked for your user number from the "User number" dialog box.

We recommend that customers allocate individual, unique user numbers to their staff, as a means of identifying which questionnaire responses were input by which member of staff.

From the "User number" dialog box, if your name and number are shown, simply use your mouse to select it from the list. If your details are not listed, you should type your user number and full name in the boxes provided. If you do not know your user number, ask your supervisor to allocate you with a unique interviewer (user) number. Then select [OK] to continue.

Tip: the Data window shows the user number and name at the bottom of the screen. If it is not displayed correctly please tell your supervisor.

Start of interview dialog box

You are then positioned at the "Start of interview" dialog box, ready to begin entering data. You will return to this dialog box at the end of each questionnaire ready to enter a new one.

The options available to you will depend on the entry mode selected when the QIF was made.

Input modes

There are three modes of input that can be selected when the project files are generated. The mode chosen affects the visual look and the default actions when using the program. Some of these things can be changed by using the F9 key to invoke the "[View options](#)" dialog box.

Paper mode

Paper mode is used to enter documents (usually questionnaires) into a data file. It is also used to verify data by entering questionnaires a second time and comparing the two copies of each question.

This mode is optimised for keyboard entry although the mouse can still be used if preferred.

When this mode is used, most of the features are shown on the Data window including the [Data] menu and toolbar at the top, the list of entries on the left, and the history window on the right.

When not entering or verifying questionnaires the menu and toolbar can be used to perform other tasks, see section [Data window](#).

This mode is optimised for rapid input of data and the program moves on to the next entry as soon as data is entered for a question.

CAPI mode

CAPI (Computer Assisted Personal Interview) mode is used when respondents will be entering data themselves. This may be done in hall tests, within companies by employees, and in the street using a Tablet PC.

This mode is optimised for mouse entry although the keyboard can still be used if preferred.

Only the necessary features are shown on the Data window.

When no more questionnaires are to be entered the program terminates.

This mode is optimised for ease of use, the Data window is uncluttered, and the program does not move on to the next question until requested.

Telephone mode (QPSMR Telin only)

This mode is similar to CAPI mode but also allows appointments to be made. This mode can also use sample and quota control facilities when the project files are created by QPSMR CATI.

This mode is optimised for mouse entry although the keyboard can still be used if preferred.

Only the necessary features are shown on the Data window.

When no more questionnaires are to be entered the program terminates.

This mode is optimised for ease of use so that the interviewer can concentrate on the phone conversation, the Data window is uncluttered, and the program does not move on to the next question until requested.

Sub-modes

Test mode

This can be selected to practise input without saving any data. It should also be used for testing the questionnaire set-up and routing.

Input mode

This means that a questionnaire is being entered.

Verify mode

In a Paper mode project the user can elect to verify previously entered questionnaires. The input is the same as in Paper mode except that if any differences are found between this entry and the earlier entry a dialog box appears and the user has to choose whether the older input was correct or the newer one is correct.

Update mode

In a Paper mode project the user can elect to change the contents of previously entered questionnaires.

View options for data dialog box

From the Start of interview dialog box use the [Options] button. From the Data window press the [F9] key, or select the [View option] toolbar icon, or [View] [Options].

Making selections from this dialog box allows you to alter the appearance of the Data window, for the current data entry session. Note that your view options will not be retained once you exit the Data window; in the next data entry session the default view options will be used.

By selecting or deselecting the appropriate check box, you can choose to include or remove the following items:

Menu - The Data window menu appears at the top of the window.

Toolbar - The toolbar appears at the top of the window.

List of entries - This normally appears on the left hand side of the screen in Paper mode.

Filters on list - Filters are not normally shown on the list of entries during data entry. However, if filters have been applied to your questionnaire and you select the [Filters on list] check box, then all filters will be listed.

Variables on list - To see any variables you have defined whilst entering data. Your variables will then appear during data entry in the "Entries" list.

The Up and Down buttons - These are very useful for CAPI and CATI interviewing as the mouse is often used to enter data.

The Entry name with question text - The entry name is normally shown immediately before the question text, for example: "Q1. How often do you&ldots;".

Invalid responses to be shown on list - If this option is selected then all responses to every relevant entry will be displayed. If it is not selected then only valid responses are shown.

History of input - When working in Paper mode the "Data input history" which shows all responses that have been entered so far, is shown on the right hand side of the screen.

Hold questions until next requested - When this option is selected you will need to use your mouse to select the next entry or press the [Enter] key on your keyboard to access the next question.

None option for all entries - This means that it is possible to skip (leave empty or blank) any entry in your questionnaire. If this option is not selected, QPSMR will require that you select a valid response for each entry in the project, as data is entered unless it is marked to allow blanks.

Assume none if empty when down - This allows you to press the [Enter] key to denote a blank (empty or skipped) response during data entry. If the [Assume none if empty when down] check box is not selected in order to skip a response the * or F5 key should be used. This selection should only be used when testing.

Fonts

You can change the fonts used by QPSMR for question and response texts and also for other information which appears on the Data window. Simply select the appropriate button [Question font], [Response font] or [Information font] and the Font dialog box will appear, allowing you to choose the font, style and size you require. Note, for the [Question font] you can also select a colour and special effect (such as underlining) for the question text.

Start at entry

You may select which entry should be displayed first during "Update data", by choosing an entry from the [Start at entry] menu. This is useful if you need to update the same question on a number of questionnaires in your data file.

To do this you can make a new serial list to identify the questionnaires which need updating; the [Start at entry] selected from the "View options for data" dialog box will automatically be displayed at the screen for each questionnaire in turn. See section [Update data](#).

Data entry start

Start of interview dialog box

This dialog box is used to start the entry of a new questionnaire and it appears when the program is started and whenever a questionnaire is finished with.

Closing this dialog box will terminate the program, except in Paper mode.

There is a test mode which allows a dummy run through the questionnaire without storing any data, see section [Test input](#).

If partially completed records have been saved then they are listed and particular questionnaires can be recalled and continued by serial number. Partially completed records are also called Appointments because for Telephone mode an appointment will have been made to call back the respondent to continue the interview. A full screen list of Partial questionnaires can be requested, see section [Partial data](#).

Usually in CAPI or Telephone modes, new records will be allocated a serial number by the program.

In Paper mode the user will normally set the serial number. This will usually be printed on the paper document - put there with a sequential number stamp device.

For details about how to enter data for a project see section [Question display](#).

At the end of each paper questionnaire the "[End of interview](#)" dialog box is displayed.

When using Telin with sample data, a different dialog box with more information is used, see section [Start of interview with sample](#).

Start of interview with sample (QPSMR Telin only)

The "Start of interview with sample file" dialog box is used in Telin to start entry of a new questionnaire and it appears when the program is started and whenever a questionnaire is finished with.

Closing this dialog box will terminate the program.

There is a test mode which allows a dummy run through the questionnaire without storing any data, see section [Test input](#).

If appointments have been saved then they are listed and particular questionnaires can be recalled and continued by serial number.

Usually in CAPI or Telephone modes, new records will be allocated a serial number by the program.

For details about how to enter data for a project see section [Input data](#).

At the end of each paper questionnaire the "[End of interview](#)" dialog box is displayed.

Important: The [Add new serial] button should NEVER normally be used to enter an interview. The only time [Add new serial] should be used is if only a few more interviews are required and interviewers are calling "new" potential respondents from a separate list (they have not been included in the Sample data file).

Respondents to interview are either in the Sample data file waiting to be contacted, or they are in the Partial data file waiting to be called back. Interviewers should select either [Sample], or type in the required serial number and select [Get serial] to retrieve a specific interview, or double click an appointment to make the call-back. When [Sample] is selected QPSMR selects a fresh sample first and then sample with the least number of tries.

Sample

The name of the Sample data file is displayed at the bottom. If sample points have been specified by your supervisor, information from the Sample data file will be listed in the "**Sample selection**" boxes. If you do not wish to call specific sample points from the sample, simply use the {any} selection which is always listed if sample points are used. To call up contacts from a particular sample point use the pull-down arrows and make your selections. For example, if the first sample point entry was "Type of Business" and the second was "Size of business" you might select a business type from the first pull down menu and a size from the second.

Alongside each sample selection box the "**Quota to do**" is shown. This is the number of interviews that are still needed to fill the quota, assuming that the set percentage of any "In progress" and "Finished" interviews will be successfully completed. The number of interviews currently being undertaken (those that are "In progress" or "Finished" multiplied by the set percentages) for each sample point is shown in the "**Current**" box. The sample point entries need to have also been used as quota entries for these figures to show.

The "**Total**" sample box shows the total number of contacts available (in the whole sample data file, if no sample points have been chosen). If sample points have been selected this will be the number of contacts available in the particular sample points.

The "**Fresh**" sample box shows the number of contacts that have not yet been tried (those who have never been called up).

The "**Left**" sample box is the most important box, as it shows the number of contacts that are still "live" and available for contact (even though they may have already been tried, contact was not made). This figure includes those already shown in the "Fresh sample" box.

In summary - if the:

Total sample=100

Fresh sample=20

Remaining sample=40

this would mean that out of 100 contacts, 20 had not yet been tried, 40 were still "live" (including the 20 not already tried) and 60 respondents were either "dead" (contact could not be made), or they are appointments (partial interviews waiting to be called back, see section [Partial data file](#)), or they are "terminated" (aborted, out of quota or ineligible) or they are completed interviews.

Tip: QPSMR will not issue sample known to be out of quota in the sample points selected.

Quotas

For CATI it is possible to use a quota file to control which respondents should not be interviewed. If a quota file is being used (it was included when the QIF file was generated), the name and folder path of the Quota file is displayed at the bottom of the "Start of interview" dialog box. The quota remaining for each sample point entry is shown alongside the "Sample selection" boxes. To look at the Quota Control file in detail select [Quotas view], see section [View quota control file](#).

Appointments

Concise information about appointments is displayed at the "Start of interview with sample" dialog box; the serial number, when the call back should be made, the priority setting, any short comments and who should make the call-back are shown. The appointments contained in this concise appointments listing can be altered by making selections, as follows.

The total number of appointments available is shown (if a sample point is selected the total number of appointments for that sample point will be shown). It is also possible to use the [Appointment] menu to show the number of appointments available in each priority response. See also section [Making an appointment \(CATI\)](#).

Interviewers can choose to show only their own appointments, by checking the "Mine only" check box. If an appointment is late the icon changes and will appear on the appointment list of all interviewers, regardless of the "who should call back" setting - see section [Icons used with CATI appointments](#).

When an appointment is due the word "NOW" appears under the heading "When". Alongside the word "NOW" the acceptable delay is counted down, then "NOW =" will be displayed for 1 minute, after which time the appointment will be marked as LATE (with the length of time it is overdue shown).

It is possible to choose how far in advance appointments should be displayed, by making selections from the pull down list view. You can choose from various times starting with those due in [15 minutes] through to [Ever], when all appointments will be shown.

The [Details] button may be used to see more information about the appointments (see Appointment list details below).

To call-back an appointment shown in the concise list, simply double click the serial number (alongside the appointment icon).

It is also possible to retrieve a partial interview (one for which some information has already been collected, often simply contact and call-back details) if you enter the required serial number and select [Get serial], alternatively use the [Partial list view] button to see a list of partially completed interviews (appointments). See also section [Partial data file](#).

Appointment list details

Full details about each appointment are shown, as well as the concise information;

- serial
- when
- priority
- short comment
- who should make the call back
- percentage of the interview that is complete
- number of calls (tries) today and ever
- date
- time
- result of previous calls
- sample points

You can double click an appointment from this list to make a call-back or simply select [OK] to return to the "Start of interview with sample file" dialog box.

Tip: when deciding what percentage of the questionnaire has been completed QPSMR does not include any questions up to and including the last entry marked as a sample point.

Refresh display

If the "Start of interview with sample file" dialog box has been left on the screen for some time the "Refresh display" button can be used to update the concise list of appointments and sample point figures.

Once you have made your selections from the "Start of interview with sample file" dialog box, you will see the [Retrieved serial information](#) dialog box from where you will hopefully make contact with and continue on to interview the contact shown. At the end of a successful interview you will see the [End of interview](#) dialog box.

Test input

QPSMR has a "test input" facility which allows you to enter test data for a questionnaire, without storing the data in a data file and without setting the "Data files exist switch" on. This facility enables you to work through your questionnaire entering data as a "practise run".

When a project uses randomisation (not paper input) the randomisation is linked to the serial number.

When testing, different serial numbers can be selected to get different orders for the relevant questions and responses.

For easy identification, when working in TEST mode (where no data is collected) the screen background is coloured red.

IMPORTANT Tip: You have the option of showing filters and variables in the "List of entries" on screen. This is very useful for checking filtering (routing) and making sure that filters and variables are behaving as expected, see section [View options for data](#). You may also wish to turn on the "None option for all entries" and "Assume none if empty when down" when testing a questionnaire.

For Telin users with quota control, the quota file is not updated when working in test mode.

Tip: to return to the first question in the project, at any time during the test, hold down both the [Ctrl] and the [Up arrow] keys, or select [Questions] [First question] from the menu.

For details about how to enter data see section [Input data with different question types](#).

As you test data in paper mode a "data input history", showing all responses that have been entered so far, appears on the right hand side of the screen. This history may be removed, if it is not required, see "History of input" in section [View options for data](#).

Tip: when testing data, as you reach the end of one test questionnaire (record) a message is displayed asking if you wish to clear out the questionnaire data and start again at the first question. If you select [Yes] you are positioned at the start of another test questionnaire. If you select [No] you are returned to the last question in the current test questionnaire.

Retrieved serial information

Whenever a serial record is retrieved from the Sample file (QPSMR Telin only) or the Partial data file a dialog box appears that shows any information entered so far for this record.

When [Sample] is selected from the "Start of interview" dialog box QPSMR selects at random a fresh sample first and then the sample with the least number of tries. All of the information that has been pre-loaded into the Sample data file for the individual record is shown in the "Retrieved serial information" dialog box. This normally includes the contact details and telephone number, along with any other sample point entry information.

If the project contains an entry called TELNUM (a character entry with a width of up to 32, normally used to store the telephone number) the TELNUM line will be highlighted, so it can easily be located in the list.

Tip: autodialing - If you have TAPI version 2 compatible facilities (modem) and your project contains an entry called TELNUM to store the telephone number, it is possible to select the [Dial] button to dial the number automatically.

From the "Retrieved serial information" dialog box the interviewer must select either [Not tried], [Failure] or [Interview] to continue.

Not tried

To return to the "Start of interview with sample file" dialog box, without calling the sample displayed simply select the [Not tried] button. The record remains on the Sample data file and is not changed in any way.

Failure

Interviewers should only select [Failure] if they fail to make contact with the respondent or they want to make an appointment. The "[Failed contact](#)" dialog box, with a list of reasons, will then be shown so interviewers can select the reason why contact could not be established, for example, line engaged, and the action they would like to take.

Interview

If contact is made and the interview can take place straight away, the interviewer should select [Interview]. They will then be positioned at the last entry in the questionnaire that contains data (typically the entry after TELNUM). For call-backs interviewers can use the [Up] selection to re-cap if need be.

To make an appointment after selecting [Interview] the interviewer should immediately use the [F12] key and select [Continue later]. The "Appointments" dialog box will then be shown, so the call-back date and time and other details may be entered, see section [Making an Appointment](#). The data record itself is then copied from the "sample data file" and stored in a "partial data file", from where it can be retrieved and continued later.

Tip: a record "issued" from the sample file is not necessarily a successful interview, as it may later be aborted (F12) or found to be out of quota or ineligible.

History

The interviewer can use the [History] button to see details about the record (the date, times and results of previous calls, the percentage of the interview that is complete, plus any comments).

Tip: if, when a record is retrieved from the "Partial data file", it is immediately rejected; interviewers should use the [Up] selection to see which question caused the rejection. An example of this would be if a quota cell (which was only partially full when the interview was started) had been filled whilst the record was "waiting" in the partial file to be recalled.

Failed contact

From the "[Retrieved serial information](#)" dialog box, if contact cannot be made it is possible to select [Failure] to see the "Failed contact" dialog box, and then choose a reason why contact could not be made. For example, the line might be engaged or the interviewer may have reached an answering machine.

Once you have selected a reason, they should then choose an action -

[Leave as sample] This selection is available when a sample record has been retrieved and it will return the record to the sample data file as a "live" record, so the respondent may be presented again.

[Appointment] This selection should be used to make call-back selections from the "Appointment" dialog box, see section [Making an Appointment](#). This button should only be used for "real" appointments. If there is no specific call back time then use "Leave as sample" if it is available.

[Dead (no)] This selection should only be made when the interviewer is sure that the respondent should not be contacted again. The record remains in the sample data file, marked as "dead" and will not be presented again.

[History] This selection can be used first to see the History window, where the dates and times when the interview has previously been tried, and the results of the calls (for example, no reply, engaged and so on) are shown. The Short and Long Comments and the percentage of the interview that is complete, are also displayed.

Data entry

Data window

This is the window used for entering data and it is usually maximised to use the whole screen.

In Paper mode the menu and toolbar appear at the top of the window, see section [Data menu](#).

Each relevant question is presented in turn using most of the window until the questionnaire is completed, see section [Question entry](#).

Some questions will be skipped past if they are filtered for this questionnaire.

In Paper mode a "History of input", that shows all question responses that have been entered so far, is shown on the right hand side of the screen. This history may be removed, see section [View options for data](#).

Various details are shown in boxes at the bottom of the Data entry window:

- Name of the entry that is currently being displayed at the window.
- Entry Type and the number of possible responses (or for integer, float and character questions the maximum number of data locations allowed to store your answer). For example, Q S 6 means a Question which is single-coded and has 6 possible responses, Q I 2 means a Question which expects an Integer answer using up to 2 data locations (you may enter numbers up to 99).
- The responses selected so far. This box is particularly useful if you have a single-coded or multi-coded question with a large number of responses, as you would otherwise need to use the scroll bar to move up and down the list of responses to see which ones have been selected. This box enables you to see them at a glance.
- Serial number for the record currently displayed at the screen.
- Position of that record within the data file. When data is being entered (Input mode) this box simply shows "NEW SERIAL". The record is not saved to the Data file until it is completed.
- The number of records currently held in the Data file.
- Sub-mode in which you are working (TEST, input, update, verify or view).
- Station number (the number of the computer being used).
- User number (which identifies the number of the user).

- User Name (the name of the user).

TIP: For easy identification, when working in TEST mode (where no data is collected) the screen background is coloured red.

Tip: the fonts used for the Input data windows are automatically matched to those set for your computer (from the Control Panel, select [Display] [Appearance]). If you wish to alter the size of the "Question" text you should modify the Control Panel "message text" font; if you wish to alter the size of the "Response" text you should modify the Control Panel "menu" font.

Question display

Each question is presented on the Data window, in sequence, one at a time;

- Question text - in Telephone mode, this should be read to the respondent.
- Interviewer instructions provide any additional help with the question.
- Response box or list of responses.

Data may be entered by using your mouse (by clicking on appropriate responses) or you may use your keyboard to enter response numbers.

If you are not in Input (or Update or Verify) mode you will not be able to enter data - the mode is shown at the bottom of the data window.

The F12 key can be used at any time to abort input on the current questionnaire. If the questionnaire is not complete you can save a partial record or make an appointment in Telephone mode.

For information about Update data, see section [Update data](#).

For information about Verify data, see section [Verify data](#).

Determining question type

If you are unsure of the type of question currently displayed, you can refer to the bottom of the screen. The type of the entry and number of possible responses, or for integer, float and character questions the maximum number of characters allowed to store your answer, is shown.

- The first letter is either a Q denoting a question or a G for a grid.
- The next letter describes the entry type:

S	single-coded
M	multi-coded
C	character
I	integer
W	weight
T	interviewer text
V	verbatim

Y	date
H	time

- The number that follows these letters indicates:
 - Number of responses for single-coded or multi-coded question.
 - Number of digits allowed for integer question.
 - Number of digits allowed (including the decimal point and following digit) for float question.
 - Number of characters allowed for character question.

For example, Q S 6 means a Question which is single-coded and has 6 possible responses, Q I 2 means a Question which expects an Integer answer using up to 2 data locations (you may enter numbers up to 99).

No response for empty questions

To indicate non-response to a question:

Using the keyboard press the [*] (asterisk) or [F5] key

Using the mouse, the [Next] button on the screen should be used to leave an entry blank.

The response to the question will then be set to blank or undefined.

Important: integer and float questions can be used in statistics, for example mean scores. You should not enter a zero for empty values because this will produce faulty statistics.

The following selections are set in "[View options for data](#)":

The [None option for all entries] selection allows you to specify that it is permissible to skip (leave empty or blank) any entry in your questionnaire. If this option is not selected, QPSMR will require that you select a valid response for each entry in the project.

If the [Assume none if empty when down] check box is selected from the "View options for data entry" dialog box, it is also possible to use the [Enter] key on your keyboard to leave the questions empty (blank).

Errors during input

If you make a mistake when entering data, and you are not sure at which question the error occurred, use the [Up] button, or the [Move up to previous entry] toolbar icon, or select [Questions] [Up to previous answered question] to move towards the start of the current questionnaire, looking at each answer. When you locate your error, you should re-enter the correct information.

See section [Question types](#) for instructions on how to add extra responses to multi-coded questions (without the need to re-enter those already selected).

Tip: the [Down] button, the [Move down to next question] toolbar icon, or the menu selection [Questions] [Down to next answered question] allow you to move down the questionnaire (towards the last entry).

It is also possible to use the [ESC] key (Escape) to move back to the previous entry and to press [ESC] when the previous response is highlighted, to **delete the response**.

Important: [ESC] should not generally be used for moving up the questionnaire - it is only intended to be used when a mistake has been made in the last question reached so far for this questionnaire.

In Paper mode, you can select any entry and re-enter the correct responses for it, and any for the following entries (if needed). If you are sure that the entries that follow the modified entry have correct data entered, you can use the [Next] button, or the [Move to fresh entry] toolbar icon, or select [Questions] [Next question which needs an answer] or press the [Ctrl]+[Down] keys, to move down to the next question which required a response to be entered. You may also use your mouse to select the next question which needs data from the "Entries" box. Questions that already have responses allocated to them are shown in a bold type in the "Entries" box, so you would select the next entry listed that is not emboldened.

Note that if the new data you enter satisfies different filter conditions from the data previously entered, QPSMR will automatically position you at the next entry which should be now answered as a result of the revised data which you have just entered.

Moving on to the next question

In Paper mode the program will automatically move on after keyboard input of single-coded questions.

Using your keyboard simply press the [Enter] key when you have finished with a question.

Using your mouse, click the [Next] button, or the [Move to fresh entry] toolbar icon, or select [Questions] [Next question which needs an answer], or press the [Ctrl] and [PgDn] keys, to move down to the next question which requires a response to be entered.

At the end of the questionnaire

When you have entered the last relevant question in the current questionnaire, the "[End of interview](#)" dialog box is displayed.

To save the data entered for the record (serial number) select [Save questionnaire], you are then automatically positioned at the "Start of interview" dialog box, ready for the next questionnaire.

If, however, at the "End of interview" dialog box, you wish to return to the Data input window for the same serial before saving the data you have entered, select [Return to questionnaire].

Tip: to return to the first question in the project, at any time during input, Use [Ctrl]+[Up] arrow key, or select [Questions] [First question] from the menu.

Question types

This section describes the different question types.

Single-coded

All available responses are shown, with a number in front of each. Only one response can be selected.

If response filters have been used on your questionnaire, the response list will only show those responses available for this questionnaire.

Using your keyboard, simply type in the appropriate response number. Note that you must type the number exactly as shown in the box at the screen - if leading zeros are shown, they must be typed. For example you may need to type 01, or 001 rather than 1, depending on the number of responses allocated to the question.

Using your mouse, point at the response and click your mouse button.

If the list of responses is too long to display on screen at once it is possible to make appropriate selections from the [Responses] pull down menu to view the previous or next block of responses, or the first or last

block in the list. Special buttons [Page Up], [Page Down], [Home] and [End] buttons are also displayed on the screen for this purpose.

Multi-coded

The procedure for entering data for multi-coded questions is exactly the same as that for entering data for single-coded questions, except when you want to enter more than one response:

Using your keyboard, begin by pressing "/" forward slash. Then enter the responses in any order, remembering to type the appropriate number of digits for each response (any leading zeros must be entered). When you have typed in all of the responses to the multi-coded question, press the [Enter] key.

Using your mouse, once you have selected all appropriate responses, click the [Next] button to move on to the next question.

Tip: Ctrl+A can be used to select ALL responses to a multi-coded question.

If the list of responses is too long to display on screen at once it is possible to make appropriate selections from the [Responses] menu to view the previous or next block of responses, or the first or last block in the list. Special buttons [Pg Up], [Pg Dn], [Home] and [End] buttons are also displayed on the screen for this purpose.

IMPORTANT: If you make a mistake when entering data and need to return to a multi-coded question to add some more responses, if you use your mouse to add extra responses, any responses already entered will remain (any extra responses will be added to them). If, however, you enter extra responses using your keyboard, existing responses will be removed and must be re-entered (if they are required).

Tip: the plus sign (+), followed by a response number may be used to add to a list of responses and minus (-) followed by a response number, may be used to remove a response.

Integer

Only whole numbers can be entered. Valid responses may be restricted to a range of values - usually only positive values are allowed. Where applicable use a minus sign for negative numbers. The minus sign uses up one of the allocated spaces, so for example -99 would need at least 3 spaces allocated.

Using your keyboard simply type in the value (number) required and press the [Enter] key when you have finished. Leading zeros need not be typed, the number will be right-adjusted within the allocated data locations; note that the number must not be too big to fit in the allocated space.

Using your mouse simply select the numbers required from the numeric keypad display. If you make a mistake, use the [Clear] button and begin again. When you have finished, use the [Next] button, or the [Move to fresh entry] toolbar icon, or press the [Ctrl] and [PgDn] keys, to move down to the next question which requires a response to be entered.

Float

The procedure for entering data for a float question is the same as for integer questions, except that the response may contain a decimal point. A decimal point key [.] is included in the numeric keypad display.

Note that the number of digits you type, or select, including the decimal point, must not be greater than the allocated space including ".0" if it is a whole number. For example, 4999 would need 6 spaces, because QPSMR would treat it as 4999.0.

Character

When entering data for a character question, such as a postcode, you should type in the required characters and press the [Enter] key when you have finished.

Depending on the setting used for the particular question, your text may be automatically converted to upper or lower case.

Trailing blanks need not be typed - the text string will be left adjusted.

The text string must not be too big to fit in the allocated space.

Verbatim

These are the same as character questions except that they are saved to a different file and the limit on the number of characters allowed is always large (over 1000 spaces).

Date

During data entry when a date question is reached, the current date is displayed with a check box alongside. If the date is correct simply use your mouse to tick the check box. To modify the day, month or year use your mouse to point at the pull down arrow (on the left of the box) and select the appropriate information from the calendar display. Use the [Left] and [Right] arrows alongside the month to modify the month and year, and point at the appropriate number to change the day.

Tip: it is also possible to click the day, month, or year using your mouse, and then type the appropriate number using your keyboard.

During data entry information entered into "Date" questions is checked by the program, to ensure that it represents a valid date; invalid dates will not be accepted.

Time

During data entry when the time question is reached, the current time is displayed (even if this is outside the range allowed) with a check box alongside. If the time is correct simply use your mouse to tick the check box. To modify the time use your mouse to point at the appropriate section (hours, minutes or seconds) and then use your keyboard to enter the correct information, or use the [Up] or [Down] arrows at the right of the box to increase or decrease the time shown for each section (hours, minutes or seconds).

During data entry information entered into "time" questions is checked by the program, to ensure that it represents a valid time; invalid times will not be accepted.

Interviewer text and audio and video clips

This type of question is used for CAPI mode and Telephone mode to show additional text for which there are no responses.

For CAPI surveys, an interviewer text may also contain a picture (BMP) file or a video (WMV) file to be displayed on screen (with audio) during input.

Any picture or video clip will be displayed centre screen after the interviewer text. To move on to the next question, press [Enter].

NOTE: The picture or clip will not be shown when moving backwards up the questionnaire.

Data entry end

End of interview

In CAPI mode or Telephone mode you will normally be alerted to the status of the questionnaire through additional questions that appear at the end of the questionnaire.

If F12 is used and the questionnaire is not complete then a partial record can be saved, see section [Partial data file](#). In Telephone mode an appointment can be made, see section [Making an appointment](#).

When entering data the "End of interview" dialog box is displayed at the end of each questionnaire (interview) with the status of the interview shown. The status will be:

- Successful (reached the last relevant question in a normal manner)
- Out of quota
- Ineligible
- Aborted (F12 was used before the questionnaire was completed)
- Partial or appointment

You have the option of saving the record to the data file or to go back to the current questionnaire to change it.

Note that the serial number for the questionnaire is shown for reference.

If you are working on a CATI survey with a quota control file when the target is reached for a group, any subsequent respondents falling into that group will be rejected as "out of quota". Quota control may also be used to reject ineligible respondents for whom no interviews are needed. This ensures that valuable resources are not wasted by interviewing respondents who fall outside of the required quota for the project.

If an interview is out of quota or ineligible the definition syntax and text of the response which caused the questionnaire to terminate is shown.

Important: If a question included in the quota control file is left empty (blank) during an interview this will be treated as ineligible.

The [F11] key should never be used unless the record is a test record (not real data). If F11 is used then you have the option to discard the questionnaire and not save it.

Suspended input

It is possible to stop the interview and either save all of the information entered so far, as a partial record which may be continued later, or to permanently discard the interview (abandon the record).

Save a partial interview/questionnaire (to continue later)

To save part of an interview (or the information entered "so far" for a paper questionnaire) use the [F12] key, to see the "Suspended input" dialog box.

You should then select [Continue later]. Telephone mode interviewers will then see the "Appointments" dialog box, See section [Making an Appointment](#) for details on how to make an appointment (call-back).

You may also then see the "End of interview" dialog box with "PARTIAL INTERVIEW" shown.

Using the [Continue later] button, means the record will be saved to a "Partial data file" from where it may be retrieved and the interview or data entry from a paper questionnaire continued at a later time; see section [Partial data](#).

Important: verbatim comments are always written to the CSV file for the Main data file, never to a CSV file for the Partial file.

Terminate interview/paper questionnaire (saving information)

The [F12] key may also be used to abandon an interview.

At the "Suspended input" dialog box, select [Terminate]. This selection means that the information entered so far will be saved to the Main data file, but interviewers (users of the Input or Telin programs) will NOT be able to "call up the interview" and continue entering data later. If you wish to continue the interview at a later time you should always use the [Continue later] button.

After selecting [Terminate] interviewers may see a set of questions requesting the reason why the interview has been terminated followed by the "End of interview" dialog box, with "ABORTED INTERVIEW" shown, here they should select [Save questionnaire].

The record containing any information already entered will be saved to the Main data file.

Discard interview/paper questionnaire (NOT saving information)

This is for supervisor use only.

To discard an interview or paper questionnaire (NOT saving the information entered so far) use the [F11] key, to see the "Suspended input" dialog box, then select [Discard].

Tip: care should be taken when using this [Discard] button, as the information will be **permanently discarded** - if you are in any doubt we recommend that you use the [Terminate] button to save the information entered so far to the Main data file.

Tip: it is not possible to discard a record if information has already been saved for it, for example, during a call-back, as part of the interview has been completed and already saved to the Partial data file. Instead you should use the [Terminate] button and inform your supervisor if necessary.

Return to questionnaire

From the "Suspended input" dialog box the continue interview now [Return] button allows you to return to the current interview or paper copy questionnaire and continue entering data. You will be positioned at the next question which requires an answer.

History

The [History] button can be used to see the "History" dialog box, where the dates and times when the interview has previously been tried, and the results of the calls (for example, no reply, engaged etc). The Short and Long Comments and the percentage of the interview that is complete, is also displayed.

Quotas

If a quota file is used with a CATI project, interviewers may use the "View quotas" button to look at the quota information.

Making an appointment (QPSMR Telin only)

Two types of appointment can be made from the "Appointment" dialog box:

Vague appointments

These are usually made when the line is engaged or there is no answer and so on. You begin by selecting from the 3 radio buttons "Soon" "Later" or "Tomorrow".

If you choose "Soon" the date box will display "today's" date, and the time in 10 minutes, so the interview will be displayed in 10 minutes (and will become late 10 minutes after the time displayed). The "Later" button will cause the interview to be presented in 1 hour after the time displayed and it will not become late until 1 hour after that. The "Tomorrow" button will cause the interview to be presented at the same time tomorrow (and it will become late 1 day after that).

You may also modify the "Priority", "Who should call back" and "Comments" settings (see below).

Fixed appointments

These are usually made when the interviewer has spoken to the respondent, or someone else, and a specific date and time to call back is agreed. Fixed appointments are first set by using the "Today" or "Next day" buttons.

Selecting "Today" means that the current date, and the time in 1 minute, will be displayed with a delay of 1 minute before the appointment becomes late. The "Next day" button is used to move on in time day by day, for each day the time in 1 minute will be displayed (with a delay of 1 minute). If a future date is displayed the "Previous" button becomes active so it is possible to move back and forth day by day.

Again these settings and the "Priority", "Who should call back" and "Comments" settings (see below) may be modified as required.

After choosing a Vague or Fixed appointment, the date and time may be modified, by using the "Night", "Morning", "Afternoon", "Evening" and hours and minutes buttons, or by typing in the boxes, as required. There is a calendar that can be used to set the date.

Tip: when an appointment becomes late it is marked LATE, the icon changes and it appears on the appointment list of all users (even if it is not marked using the "Any user" radio button) at the "Start of interview with sample file" dialog box, see section [Appointment icons](#).

Priority

The priority responses displayed on the left of the "Appointment" dialog box are those set by your supervisor in entry ZZZPRI. Up to 30 responses with any text can be used, but response 1 must be given the highest priority because QPSMR will arrange the appointment list, shown at the "Start of interview with sample file" dialog box, with each time band sorted into priority (the lower the number the higher the priority).

When making an appointment simply select the appropriate priority response.

Tip: when the "Appointment" dialog box is first displayed, if the "Today" button is selected, the priority setting will automatically default to response 1 (which you may alter if you wish).

History

At the "Appointment" dialog box the number of times the interview has been tried in total, the number of times it has been tried today and the percentage of the interview that is complete are shown.

The "History" button can be used to see the "History" dialog box, where the dates and times when the interview has previously been tried, and the results of the calls are shown. The Short and Long Comments and the percentage of the interview that is complete, are also displayed.

Who should call back

There are 3 radio buttons used to specify who should call back; "Any user", "Me" or "Someone else".

If "Someone else" is selected the list box above the radio buttons becomes active and you can choose the user number and name of the interviewer who should make the call. The number is taken from the **User Numbers** file located in the default start-up folder, see section [Starting input](#).

Tip: the user number of the interviewer who made the appointment is also stored.

Comments

If you wish to allocate a short comment to the appointment, up to 20 characters may be typed in the short text box immediately below the "who should call back" radio buttons. This short comment is normally used to display "in-house comments" or characters which have a special meaning. Any short comments are listed at the "Start of interview with sample file" dialog box, alongside the appointment details.

It is also possible to allocate a longer comment to an appointment; for example, you might wish to include details about the interview or the respondent. Simply type the comment in the text box at the bottom of the "Appointment" dialog box. The amount of text that you can enter is determined by the width allocated to ZZZDET by your supervisor.

Partial data file

It is possible to stop the interview at any time and save all of the information entered so far in a Partial data file, from where it may be retrieved and continued at a later time. Once a questionnaire has been completed the finished interview is saved to the Main data file, and it is removed from the Partial data file.

Partial records are most commonly saved when working in Telephone mode, usually when a respondent asks to complete the questionnaire at another time, see section [Making an Appointment](#). Information from paper questionnaires, however, can also be saved to a Partial data file and continued later.

To save part of an interview (the information entered "so far") use the [F12] key, and select [Continue later].

Important: verbatim comments are always written to a separate file and are not retrieved when partial records are recalled.

The Partial data file name

Once a user has asked that an interview be [Continued later], the serial number along with all of the information entered so far, is stored in a Partial data file which is created automatically by the program. The Partial data file is stored in the same folder as the Question Definitions (QDF) file and is named as follows:

Project Partial.typ

where *Project* is the name of the Question Definitions (QDF) file and *typ* is the data file type - either CBA or ASC. For example, a project called Phones200311.QDF with an ASC Main data file would have a Partial data file called Phones200311 Partial.asc. Note that this naming structure is always used regardless of the name of the Main data file.

For CATI users, records that are saved to the Partial data file are NOT counted as saved interviews in the quota

Saving a partial questionnaire

It is possible to stop the interview at any time and save all of the information entered so far in the Partial data file, from where it may be retrieved and continued at a later time. Once the questionnaire has been completed the finished interview is saved to the Main data file and it is removed from the Partial data file.

Partial records are most commonly saved when working with CATI projects, usually when a respondent asks to complete the questionnaire at another time, see section [Making an appointment](#). Information from paper questionnaires, however, can also be saved to a Partial data file and continued at a later time.

Recalling a questionnaire

You can call up an appointment simply by double clicking the serial number in the appointments listing at the "[Start of interview](#)" dialog box or the [Details] list.

Partial interviews can also be called-up by typing the required serial number and using the [Get serial] button, or using the [Partial list view] button to see the "Partial interviews" dialog box (see section Partial interviews).

Tip: if, when a record is retrieved from the Partial data file, it is immediately rejected, interviewers can use the [Up] selection to see which question caused the rejection. An example of this would be if a quota cell (which was only partially full when the interview was started) had been filled whilst the record was "waiting" in the partial file to be recalled.

If the interview is completed successfully (or terminated) it is then removed from the Partial data file and saved in the Main data file for the project. If the record is not completed, it is possible to, once again, save the information entered so far (in this and any previous sessions) as a partial interview to be continued (by pressing the [F12] key, then selecting [Continue later] from the "Suspended input" dialog box). Partial interviews can be retrieved from the Partial data file and continued as many times as required, until they are finally completed.

Important: verbatim comments are always written to the CSV file for the Main data file, never to a CSV file for the Partial data file.

Tip: if your Partial data file is very large and retrieving a partial record seems slower than you would expect, we recommend that you inform your supervisor who may wish to "sort and compact" the Partial data file to remove any wasted space.

TIP: If the CATI question definitions file (QDF) is modified after some interviews have taken place, the supervisor may need to [Sort and compact] the Partial data file, before the program will allow interviewers to select serial numbers from it (usually to "call back" respondents, who have made an appointment). This is

because records already held in the Partial data file must be the same length as any new records entered using the modified Question Definitions (QDF) file.

Data menu (paper mode only)

Data menu overview

When not entering data in Paper mode the Data menu (and toolbar) can be used.

For a description of the function of each toolbar icon available from the Data window, see section [Data window toolbar descriptions](#).

Selecting the [Add new questionnaire] toolbar icon, or selecting [Action] [Add new paper questionnaire], from the Data window, allows you to enter data from a paper copy questionnaire into the current Data file. The "Start of interview" dialog box is displayed with the next available serial number shown; to enter an alternative questionnaire number simply type the appropriate number in the box. When the correct serial number is shown, click [Add new serial] to start entering data.

Existing data can be updated, using the [Update questionnaire] toolbar icon or by selecting [Action] [Update questionnaire]; and it can be verified using the [Verify questionnaire] toolbar icon or by selecting [Action] [Verify questionnaire].

It is also possible to view (but not alter) data already entered, by selecting the [Look at the questionnaire with this serial number] radio button from the "[Which serial number](#)" dialog box, see section .

It is possible to move about the questionnaires in the Data file (searching by serial number, or moving up to the previous, down to the next, or moving to the questionnaire at the top or bottom of the file) by using appropriate toolbar icons or by making selections from the [Serial] pull down menu.

When entering data within an individual questionnaire (record), it is possible to:

- move up to the previously answered question
- move down to the next answered question
- move to the next question which requires an answer (a fresh entry)
- abandon
- save changes you have made

These can be achieved by using the appropriate toolbar icons or by making selections from the [Questions] pull down menu.

Another menu available from the Data window is [Responses], which allows you to use your mouse to leave a question empty (skip/blank) and delete responses including the current response to the end of the questionnaire, or all responses in the current questionnaire. Selections can also be used to move around long response lists, so you can view the previous or next block of responses, or the first or last block in the list, although [Page Up], [Page Down], [Home] and [End] buttons are also displayed on the screen for this purpose.

The [View] selection from the Data window allows you to look at a [List of serial numbers in data file] in the Data file. You can choose to [List serial numbers] where you will see a View window showing all the different serial numbers in ascending order and the position of each serial number (record) in bytes in the Data file. If

you select [Missing serial numbers] a View window is shown reporting any missing serial numbers. If there are no missing serial numbers in the file, the View window will show the lowest and highest serial numbers only.

To see all of the responses chosen by the current respondent (serial number) in a View window, press the F10 key from the Data window; to see information for all records, select [View] [All serial contents]. As with the contents of all View windows, this information may be printed or output to another program, as required.

Selecting the [View option] toolbar icon, or choosing [View] [Options], or pressing the [F9] key on your keyboard, causes the "View options for data" dialog box to be displayed. By making selections from this dialog box you can alter the appearance of the Data window, see section [View options for data](#).

The [Options] menu allows you to define a print style.

The [File] selection from the Data window is used to close the program.

Update mode

For help when entering data see section [Question display](#).

Important: when a record (serial/questionnaire) is being updated it is "locked". This means that, except for data entry purposes, other networked users will not be able to access the file; they will not be able to produce reports and tables until the updates have been saved.

Once you have opened a data file which requires updating, at the "Start of interview" dialog box, select [Close] and from the Data window select the [Update questionnaire] toolbar icon or select [Action] [Update questionnaire].

The "[Which serial number](#)" dialog box is displayed with the [Update the questionnaire with this serial number] radio button highlighted. In the "Serial number" box, the first serial number in the Data file will be shown; you should overwrite the number of the questionnaire which you would like to modify and select [OK].

Tip: another way to find and update the appropriate serial number is to use the menu selection [Serial] [Find questionnaire], or use the [F8] key, and at the "Which serial number" dialog box, select the [Update questionnaire with this serial number] radio button.

Notice in the bottom left hand corner of the screen the Mode update is shown, and the first question on your questionnaire, along with the previously selected responses are displayed. As you update data in paper mode a "data input history", showing all responses that have been entered so far, appears on the right hand side of the screen. This history may be removed, if it is not required, see section [View options for data \(F9\)](#).

To update the data, select the required responses by using your mouse, or typing the response number(s) using your keyboard. For a full description of how to enter data for different types of entry, see sections [Input data with different question types](#) and [Input data](#).

When updating a multi-coded question using your keyboard, it is possible to use the [+] and [-] keys to add or remove a specified response from those selected. For example, to add response 4 and remove response 24 at Q3, ensure Q3 is ready to be updated and then press +04 followed by -24.

IMPORTANT: If you use your mouse to add extra responses to a multi-coded question, any responses already entered will remain (any updates you make will be added to them). If, however, you enter new

responses using your keyboard, existing responses will be removed and must be re-entered (if they are required).

Note, if the new data entered satisfies different filter conditions from the data previously entered, QPSMR will automatically position you at the next entry which should now be answered as a result of the data you have just entered.

When you have updated data for all appropriate entries in the current questionnaire, select the [Save changes to questionnaire] toolbar icon (*the diskette*), the [F12] key, or select [Questions] [Save changes to questionnaire]. The updated questionnaire will then be saved to the data file and the "Which serial number" dialog box is displayed with the next serial number in the Data file shown.

If you choose to update again, without saving your changes in this way, QPSMR will display a message showing the serial number and asking if you wish to save the changes to the Data file. To save your modifications select [Yes]; you are then automatically positioned at the "Which serial number" dialog box, ready to enter the serial number of the next questionnaire which requires updating.

If, however, at the "Save changes" message, you wish to return to the same questionnaire select [Cancel]; selecting [No] means that the "Which serial number" dialog box will be displayed, but your changes will be discarded. Note that you can also discard the updates you have made to the questionnaire currently displayed by using the [Abandon changes to questionnaire] toolbar icon (*the crossed out diskette*), the [F11] key, or by selecting [Questions] [Abandon questionnaire].

To move about the entries in your questionnaire, use the [Up] button, or the [Move up to previous entry] toolbar icon (*the data column with the up arrow*), or select [Questions] [Up to previous answered question] to move towards the start of the current questionnaire. Use the [Down] button, the [Move down to next question] toolbar icon (*the data column with the down arrow*), and the selection [Questions] [Down to next answered question] to move down the questionnaire (towards the last entry).

Updating responses to verbatim questions

Verbatim texts are not stored in the data file (CBA or ASC). Instead they are held in a Comma Separated Value file (CSV), which is automatically created by QPSMR, when this type of question is used. It is not yet possible to update verbatim responses in QPSMR and they may not, without modification, be used in analysis. In order to use this information it must be coded and assigned (handed back) to an open ended question.

Important: when working with a survey which uses verbatim questions it is very important not to use the "Change serial number" facility, unless you also modify the appropriate serial number(s) in the Comma Separated Value file (Verbatim CSV). This is because the "Change serial number" facility causes only the serial number used in the CBA or ASC Data file to be modified; QPSMR will NOT change the serial number(s) for verbatim comments stored in a CSV file. If you do not also modify the serial numbers in the CSV file, the verbatim answers from each respondent may no longer be tied back to their remaining responses held in the QPSMR Data file.

Starting your updates at a specified entry

You may select which entry should be displayed first during "Update data", see section [View options for data](#).

For details about how to alter the serial (record) numbers for your questionnaires, see section [Change serial](#).

IMPORTANT: Every questionnaire in your Data file must have a unique serial number for identification purposes. If, however, your data was not entered with QPSMR (for example, you have been supplied with a flat ASCII file) serial numbers may not always be included with the data. If possible, we recommend that you add a serial number to the ASCII record (preferably at the beginning of each line).

Deleting incorrect responses

Important: Deleting data will cause information from your Data file to be permanently discarded.

Selecting [Responses] [Delete responses] [Rest of the questions] means that any answers already entered for the question currently displayed, and all responses to following questions (to the end of the questionnaire) for the current serial number will be permanently discarded.

The [Responses] [Delete responses] [All questions] selection is used to permanently remove the answers to every entry in the current questionnaire. Note the serial number information will remain in the Data file, so you can re-enter the data for this questionnaire (beginning with the first entry).

Verify mode

Once data has been entered it is possible to check the accuracy of the data by verifying it against the original paper questionnaires.

Tip: it is good practice to verify at least 10% of data entered, and whenever possible verification should be undertaken by a person who did not enter the original data.

The "Verify data" option allows you to "call up" an existing serial number (questionnaire) and re-enter the data. QPSMR will detect any responses entered under "Verify data" which are different to the responses entered in the original data entry session.

To verify data, from the Data window you should use the [Verify questionnaire] toolbar icon (*the two equal data columns*) or select [Action] [Verify questionnaire].

The "[Which serial number](#)" dialog box is displayed with the [Verify the questionnaire with this serial number] radio button highlighted. In the "Serial number" box, the first serial number in the Data file will be shown; if you wish to verify a different questionnaire you should overtype the number of the questionnaire which you would like to verify and select [OK].

Notice in the bottom left hand corner of the screen the Mode "verify" is shown, and the first question on your questionnaire is displayed.

You should then enter the data as described in section [Question display](#).

If QPSMR detects a response entered under "Verify data" which is different to that entered in the original data entry session, the "Verify difference options" box is displayed. The original response and the new response are both displayed. You have the option of accepting the original response, by selecting the [Old response correct] button or accepting the new response, using the [New response correct] button. If you choose the new response QPSMR will automatically modify the original Data file accordingly. Once you have made your choice you are returned to the data screen so that you may continue verifying your data.

When verifying a character question, if an inconsistency is detected by the program the "Verify difference correct" dialog box is displayed, with the serial number shown in square brackets in the title bar of the box. Both the old (original) information and the new information is displayed along with a [Difference where?] button and an "Amended response here" box highlighting which data is different.

Tip: spaces in texts are indicated by a ^ (carat).

If the original response is correct the verifier should select the [Old part correct] button followed by [Set to amended], QPSMR will then store the original, correct information.

If the new response is correct the verifier should select [Set to amended] and QPSMR will store the new, correct information.

If neither responses are correct, the verifier should type the changes required in the "Amended response here" box, and when the information displayed in this box is correct, select [Set to amended].

The [Difference where?] button can be used as required. This button is especially useful if a long text includes several inconsistencies, as all of the text that includes inconsistencies will be highlighted. When some changes have been made, the [Where difference?] button can be selected again to identify any remaining inconsistencies.

Which serial number

The "Which serial number" dialog box is displayed whenever you:

Update data - by selecting the [Update questionnaire] toolbar icon or selecting [Action] [Update questionnaire].

Verify data - by selecting the [Verify questionnaire] toolbar icon or selecting [Action] [Verify questionnaire].

Find a serial number - by selecting [Serial] [Find questionnaire], or by using the [F8] key.

The "Which serial number" dialog box is displayed with the next serial number automatically shown; to enter an alternative questionnaire number simply type the appropriate number in the "Serial number" box.

The appropriate radio button (with the action "Verify", "Update" or "Look") is also selected. To change the action, simply select an alternative radio button.

Every time a questionnaire has been completed the "[End of interview](#)" dialog box is displayed.

Note when updating or verifying data, the serial number displayed in the "Which serial number" dialog box (as you reach the end of each record) is stepped up by 1. When looking at data, the serial number displayed in the "Which serial number" dialog box (as you reach the end of the record) is not stepped up; the current serial number remains until you type in an alternative.

Change serial

This option is used to alter the serial numbers of data stored. Do not use to move to a different serial number.

Important: When working with a survey that uses verbatim questions it is very important not to use the "Change serial number" facility, unless you also modify the appropriate serial number(s) in the Comma Separated Value file (Verbatim CSV). This is because the "Change serial number" facility causes only the serial number used in the CBA or ASC Data file to be modified; QPSMR will NOT change the serial number(s) for verbatim comments stored in a CSV file. If you do not also modify the serial numbers in the CSV file, the verbatim answers from each respondent will no longer be tied back to their remaining responses held in the QPSMR Data file.

Selecting [Action] [Change serial on questionnaire] from the Data window, allows you to choose a new serial number for the questionnaire currently displayed at the screen.

After making this selection you will see a message, explaining the action you have requested.

At the "Change serial number" dialog box the "old serial number" (the one currently used for the questionnaire) is shown. To allocate a new number to the questionnaire you simply type the new number you wish to use (in place of the old number) in the "New serial number" box at the screen.

Note that when you type a new serial, QPSMR will not accept a number already held in the current Data file. If you try to use an existing serial number, a message is displayed and QPSMR will automatically show the next available serial number (which you can overtype if you wish).

Tip: the default serial number data location width is 5. If this default setting is not altered, the largest serial number permitted would be 99999.

View window

From the Data window it is possible to view a list of serial numbers, or missing serial numbers in the current Data file by selecting [View] [List of serial numbers in data file] followed by [List serial numbers] or [Missing serial numbers] as appropriate.

Pressing the F10 key, or selecting [View] [Serial contents] allows you to see all of the responses chosen by the current respondent (serial number). The serial number is shown at the top of the page followed by each entry name, numeric response and response text for all entries that have information (they have not been filtered past). For multi-coded responses a line is output for each selected response.

There is also a [View] [All serial contents] menu selection available from the Data window, which allows you to see information, as detailed above, for all records in the opened Data file.

Information is displayed in a View window and may be printed or output to another program, as required.

For a description of the toolbar icons available from the View window, see section [View window toolbar](#).

Once you have chosen the item to view, it will be displayed in a View window.

You can alter the font, and its style and size, used for the view.

Selecting the [Edit view file (outside QPSMR)] toolbar icon or selecting [Edit] [Edit (outside QPSMR)] or [View (outside of QPSMR)] allows you to edit or view the file you are currently viewing in a program outside of QPSMR (such as WordPad). Once you have finished editing or viewing you are returned to the View window.

Selecting [Print] [Styles] allows you to create a new Print Style (PRS) file in order to print from QPSMR.

Selecting the [Print view file] toolbar icon or selecting [Print] [Print view file] allows you to print the file you are currently viewing directly from the View window.

If you do not wish to keep the view file, select the [Exit and discard view file] toolbar icon or select [File] [Exit and discard view file].

Reference Manual

File types

This section describes the files used by QPSMR Input.

All project files reside in the project folder.

All file names have two parts; the name and an extension consisting of three characters. There is a full stop between the name and the extension.

You will not see the extension unless you have unset the "Hide extensions for known file types" in View options. You must unset this if you need to change the extension of a file name.

The extension will normally be lower case (for example qif), but it is shown here, and in the rest of the manual in upper case (for example QIF) for readability.

Below are listed the files that you need to receive before you can enter data. They will normally have to be copied to a hard drive on your PC before you can begin. If you are connected to a server then these files will normally have been placed in an accessible folder on the server.

Input Control (QIF) file

This is the file opened by QPSMR Input. It contains all the information about the mode to be used and information about the other files to be used.

Question Definitions (QDF) file

This is the file that contains the questionnaire information to be used to collect the data. This is the master file for the main QPSMR modules and may simply be listed as a QDF file.

Serial Number (QSN) file

This small file controls the next serial number to be issued.

ASCII Data (ASC) file

This is where the data collected is stored unless it is a binary project (see CBA).

Binary Data (CBA) file

For binary projects the data is stored in a CBA file instead of an ASC file.

Comma Separated Value (CSV) file

Answers to Verbatim questions are stored in this file which will have " Verbatim" added to end of the name.

This file may be created when data is first entered.

CSV files are also used for CATI Quota control.

Sample Index (QSP) file (QPSMR Telin only)

Only used with CATI projects.

Contains the index to the Sample Data file.

Paper mode projects

Data entry will require:

QIF

QDF

QSN

ASC or CBA

If the project contains verbatim questions then it will create a Verbatim CSV file.

If partial records are saved then a Partial ASC file or Partial CBA file will be created.

CAPI mode projects

These require the same files as paper mode plus any picture (BMP) or video (WMV) files to be shown during interview.

Telephone mode projects

These require the same files as paper mode.

If Appointments are made then a Partial ASC file or Partial CBA file will be created for them.

CATI mode projects (QPSMR Telin only)

These require the same files as telephone mode with some extra files.

If Quota Control is used there will be a CSV file with the updated quota information.

If Sample Data files are used then there will be a Sample ASC or Sample CBA file and a QSP file with the same name.

Text Document (TXT) files

These files will be created when lists are created from the menus.

Shortcut keys

A few special keys are available when entering data:

KEY	FUNCTION
*	To skip (leave a question blank or (empty)
F5	To skip (leave a question blank or (empty)

F9	To change view options for data
F10	To view responses for all entered questions in this questionnaire
F11	Abandon questionnaire (DO NOT USE)
F12	Save questionnaire immediately
Esc	Delete responses and back up to previous question
Up	Move to the previous question
Down	Move to the next question
Ctrl + Up	Move to the first question in questionnaire
Ctrl + Down	Move to next unanswered question in questionnaire
Ctrl + A	Select all responses to a multi-coded question

A few shortcut keys are available from the Data window when not entering data:

KEY	FUNCTION
F6	Move down to the next questionnaire in file or list
Ctrl + F6	Move down to the last questionnaire in file or list
F7	Move up to the previous questionnaire in file or list
Ctrl + F7	Move up to the first questionnaire in file or list
F8	Find questionnaire

See also section [View options for data](#).

Data window toolbar

When the toolbar is displayed at the top of the Data window, each icon has a tool tip to describe its function.

[Move up to previous questionnaire]

Selecting this toolbar icon allows you to access the questionnaire (record) prior to the one currently displayed at the screen. For example, if you had entered the questionnaires in serial number order and serial 345 was currently displayed, selecting [Move up to previous questionnaire] changes the display so you are able to view serial number 344.

[Move down to next questionnaire]

This toolbar icon allows you to access the next questionnaire in your current list of questionnaires. For example, if you had entered the questionnaires in serial number order and serial 345 was currently displayed, selecting [Move down to next questionnaire] changes the display so you are able to view serial number 346.

[Add new questionnaire]

The [Add new questionnaire] toolbar icon allows you to enter data (questionnaire information) into the current Data file. This is used to enter data.

 **[Verify questionnaire]**

This toolbar icon allows you to verify the information from a questionnaire which is held in the current Data file. You must select the serial number of the record you wish to verify and then re-enter the data from the questionnaire. QPSMR will display all discrepancies between this input and the first as they occur, and you may choose to accept the original responses, or the new ones, as appropriate. See section [Verify data](#).

 **[Update questionnaire]**

This icon allows you to update the information from a questionnaire which is held in the current Data file. You must select the serial number of the questionnaire you wish to update and then make your modifications as appropriate. For more information see section [Update data](#).

 **[Move up to previous entry]**

Selecting this icon causes the entry prior to the one currently shown to be displayed at the screen. Entries which have been skipped, because filters have been applied to them, will not be available for display.

 **[Move down to next entry]**

Selecting this icon causes the entry which is listed immediately after the one currently shown to be displayed at the screen. Entries which will be skipped, because filters have been applied to them, will not be available for display.

 **[Move to fresh entry]**

Selecting this icon causes the next available entry, which does not currently hold data, to be displayed at the screen.

 **[Save changes to questionnaire]**

This icon allows you to save all of the changes you have made to the questionnaire (record) currently displayed at the screen.

 **[Abandon changes to questionnaire]**

This icon allows you to abandon (permanently discard) all of the changes you have made to the questionnaire (record) currently displayed at the screen.

 **[View options]**

Selecting the [View options] icon allows you to alter the appearance of the Data window, by making selections from the "View options for data" dialog box. You can choose to include or to remove:

- the menu
- the toolbar
- the list of entries (with or without filters and variables)
- the mouse buttons
- the entry names

- history of input
- invalid responses

You can also change the fonts used by the program for question and response texts and also for other information which appears on screen. From the "[View options for data](#)" dialog box it is possible to request that the responses to each question be displayed on screen until the next question is selected, to not accept blank (skipped) responses and to control how blank responses are recognised. It is also possible to select which entry should be displayed first during "Update data".

[Help for this window]

This icon displays help relevant to the current QPSMR window.

[Help contents]

Clicking this icon causes the "Contents" section of the on-screen help to be displayed.

View window toolbar

View windows are used to display information, such as a list of serial numbers. The View windows allow you to preserve the file you are currently viewing or to discard it.

[Exit view file]

This icon is used to leave the View window displayed at the screen. The information you are currently viewing is not discarded until another view of the same file type is produced.

[Exit and discard view file]

Selecting this icon causes you to leave the View window and for the information you are currently viewing to be discarded. This selection is normally used unless you wish to refer to the contents of the View window, which you will not be able to easily re-create at a later date, in which case the [Preserve view file and exit] selection should be used.

[Exit and preserve the view file]

Selecting this icon causes you to leave the View window and the information you are currently viewing will be saved. The view file name is shown at the top of the View window. This name will automatically be given to the contents of the View window as it is preserved. You can choose to preserve just the contents of the View window, or all of the files associated with the information displayed at the screen.

[Change font for view]

This icon allows you to alter the font which is used for the view. Any font type, style or size, which is accessible to you, may be used.

[Copy view file to clipboard as text]


This icon is used to copy the contents of the View window, currently displayed at the screen, to the clipboard in a format suitable for pasting into a word processor or editor. For example, you may wish to define a postal survey using QPSMR and then copy and paste it to a word processor to add the finishing touches before mailing to respondents.

[Copy view file to clipboard as spreadsheet]

This icon is used to copy the contents of the View window, currently displayed at the screen, to the clipboard in a format suitable for pasting into a spreadsheet program. This icon is normally used if you are viewing tables or a data list in a Comma Separated Value file (CSV).

 **[Copy view file to clipboard as SPSS syntax]**

Not used by QPSMR Input and QPSMR Telin.

 **[Edit view file (outside QPSMR)]**

This toolbar icon allows you to edit the information currently displayed in the View window using another program (such as a word processor or the Windows WordPad - saving your work as a Text only file). Once you have saved your work in the other program the modified information will be displayed in the View window at the screen. Once you exit the View window, unless you select [File] [Preserve view file and Exit] your changes will be discarded.

Tip: to specify which program is used to edit in this way select [Options] [Program for Edit] from the Main window.

 **[Print view file]**







Selecting the [Print view file] toolbar icon allows you to print information displayed in the View window. The contents of the folder in which you have chosen to store your print styles is displayed so you can choose the print style (PRS) you wish to use for printing. If you do not have a suitable print style, selecting [Cancel] will cause the "Print style" dialog box to be displayed so that you are able to create one.

Appointment icons

Information about appointments is displayed at the "Start of interview" dialog box.

The following icons are used to identify the types of appointment:

Icon Appointment Description

-  Future appointment for [Any user]
-  Future appointment for [Me] - that is the current interviewer
-  Future appointment for [Someone else] - the user number and name of the person is shown in the "Who" column
-  Late appointment for [Any user]
-  Late appointment for [Me] - that is the current interviewer
-  Late appointment for [Someone else] - the user number and name of the person is shown in the "Who" column

Tip: from the "Start of interview with sample file" dialog box interviewers can choose to show only their own appointments, by selecting the [Mine only] check box - unless an appointment is late, when it will be marked "LATE", the icon changed and it will appear on the appointment list of all interviewers, regardless of the "who should call back" setting.

When an appointment is due, the word "NOW" appears under the heading "When". Alongside the word "NOW" the acceptable delay is counted down, then "NOW =" will be displayed for 1 minute, after which time the appointment will be marked as "LATE" (with the length of time it is overdue shown).











Quota control icons (QPSMR Telin only)

When processing a CATI project, a Quota control file may be used to set targets for the number of interviews to be collected for certain groups of respondents. When the target is reached for a group, any subsequent respondents falling into the group will be rejected as "out of quota".

Interviewers can look at the Quota control file for the project they are currently administering, by selecting [View quotas] from the "Start of interview" dialog box (or from the "Suspended input" dialog box). This causes the "Quota file view" dialog box to be displayed.

The response text, the number of interviews needed (still required before the quota is reached) and the number of interviews which are in "Progress" or "Finished" (but not yet saved) are shown, along with the appropriate Quota bottle symbol.

Icon Description

	A Response for which a target has not yet been set - <i>Quota control file setting</i> = 0
	Response not included in this quota - <i>Quota control file setting</i> = [Off Ignore]
	Response is not eligible (the interview will terminate if selected) - [Ineligible for interview] additional text setting applied, or <i>Quota control file setting</i> [Ineligible]
	Response is always accepted - <i>Quota control file setting</i> - [Accept all]
	Response requires interviews (the quota is less than 25% complete)
	The quota for this response is more than 25% complete (quarter full)
	The quota for this response is more than 50% complete (half full)
	The quota for this response is more than 75% complete (three quarter full)
	The quota for this response is complete (full) but interviews are not yet saved
	The quota for this response is full and all interviews have been saved

Tip: the first "no entry" bottle logo, meaning that a target has not been set for the response, should never be seen at the "Start of interview" dialog box. If it is displayed, the response has not been allocated a target in the Quota control file, and this should be modified before any interviewing takes place.

Each time an interview is completed, the Quota control file is updated and the Quota control file display is modified accordingly. If the "Quota file view" dialog box is left on screen for some time, the [Refresh from file] button may be used to show up-to-date quota requirements.

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