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## Screeener Data

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### Appendix Objectives

Upon completion of this chapter, you will be able to perform the following:

- ✓ Understand how screener data is created for Invoke Solutions sessions
- ✓ Understand how to create excel definition files for an Invoke Solution project based on a given screener
- ✓ Create segments within the screener data
- ✓ Understand how to create PSF files with screener data
- ✓ Troubleshoot possible errors



## Overview



This chapter gives detailed instructions on how to create all the screener data components for Invoke Solutions projects.

## Screener data in general

The screener data component allows you to import all the screener data for respondents into the Invoke Solutions sessions. This feature offers the following benefits:

- 1) All respondents screener data is available in real time during the session for filtering
- 2) It is possible to 'Filter by segment' which is an 'always on' segment.
- 3) Segments in screener data are also reflected as banner points in the excel consolidated report which can save time and money spent on data processing.

## Components

In order to import screener data into an Invoke Solutions project we will discuss and understand 3 different components:




These components are defined below:

<b>Screener</b>	The screener is the actual questionnaire that respondents answered in order to qualify into the Invoke Solutions sessions.
<b>Excel definition file (questionnaire)</b>	The excel definition file is the technical file that describes the screener questions to be uploaded into the Invoke Solutions system. Segments that are needed for the project are specified in that file. This file is a project level file therefore there is only one excel definition file per project.
<b>PSF</b>	The PSF is the 'panel session file' in which the panel creates an entry line for each respondent with his specific details for the session. Screener data is incorporated into that file so that each respondent has all of the answers to the questions that are to be imported into the Invoke Solutions according to the excel definition file. The PSF is a session level file therefore there is one PSF for each session of the project.



## Resources

This document uses 3 files listed below as examples.

File	File name	Actual file resource
Screener	Screener_example.doc	 screener example
Excel definition file	excel_def_file_example.xls	 def file example
PSF	PSF_example.xls	 PSF example

The Icons represent actual files which can be accessed here.

Throughout this document examples are used using these files so it would be good practice to have the all three files open when reading this manual.



## Creating the excel definition file

The excel definition file is the layout according to which screener data will be imported into the session.

Creating the excel definition file is done based on the screener. Only those questions that need to be imported into the session should be identified and created in the excel definition file. Unnecessary questions (technical questions etc) shouldn't be included in the excel definition file even if they appear in the screener as they have no meaning or need during the sessions.

### Excel definition file structure

The Excel definition file is an excel file containing only one worksheet called 'field\_def'. The file contains a header row by default that is 10 columns long. The following table illustrates the role of each column.

Column	Name	Role
A	Form ID	ID of the entire question: Identical for all rows for a specific question.
B	Var ID	ID of the specific answer: Might be different between different answers of the same question depending on question type.
C	Start Col	Redundant: Can be filled with any numerical value.
D	End Col	Redundant: Can be filled with any value
E	Punch	The numerical sequence number for a specific answer choice: Can be identical for all answers depending on question type.
F	Question Title	A very short and summarizing description of the question: Must be identical for all answer per a specific question.



G	Question Text	The text of the question: Must be identical for all answer per a specific question.
H	Answer Text	The text of the answer.
I	Data Type	There are 4 different data types according to the question type: single, multi, grid and opentext
J	Level ID	Redundant. Should be left empty

The header row (row 1 in the file) is always identical and is always present as seen the example file.

### Questions types supported with Invoke Solutions screener

Following are the question types that are supported for screener data:

1. Forced choice questions – respondents get to choose one answer out of a given set.  
Example:  
Are you: (select one answer)  
1) Male  
2) Female
2. Multiple choice questions – respondents get to choose more than one answer out of a given set.  
Example:  
Which of the following do you currently own and use? (Select all that apply)  
1) Personal computer  
2) DVD player  
3) Ink jet printer  
4) HDTV  
5) Cell phone [must select]  
6) Digital camera  
7) Digital camcorder  
8) MP3 player  
9) none of the above [terminate]



3. Grid questions – Respondents get asked one main question in which they are asked to use a scale regarding a few attributes.

Example:

How many times would you say you have shopped in each of the following types of retail stores within the past 6 months?

The table below includes the attributed on the left and the scale on top.

	None	1 time	2-3 times	4-5 times	6 times or more
Home electronics store					
Movies/Music store					
Clothing					

4. Open end questions – questions in which the respondent have to type in their answers.

Example:

Please type in your zip code.



## Converting a screener question into the excel definition file

The following section deals with converting questions from the screener into the excel definition file. Each question type is presented separately:

### Forced choice (single choice) questions

The following question:

Are you:

- Male

- Female

Will have the following values in the excel definition file:

Form ID	Var ID	Start Col	End Col	Punch	Question Title	Question Text	Answer Text	Data Type	Level ID
cq1	cq1	1	1	1	Gender	Are you:	Male	single	
cq1	cq1	1	1	2	Gender	Are you:	Female	single	

#### Detailed explanation:

**Form ID** - every closed ended question starts with the letter combination cq (closed question) in lower case. After these 2 letters it is possible to use any combination of letters and numbers. In this example we used the number 1 just for sequence purposes. Best practice is the use of numbers as in this example as it simplifies the process. It also makes it easy to map the question to the actual question in the screener according to its number (Example - It was also possible to call it cqgender). The Form IDs for all the rows of a specific question are identical.

**VarID** - The Var ID for forced choice questions is identical to the Form ID.

**Start Col** - Redundant. Can be filled with any numerical value.

**End Col** - Redundant. Can be filled with any numerical value.

**Punch** - For forced choice questions each answer choice gets its own numerical value as the punch. The first answer must be represented by '1' and the rest must be in sequence. In the example there are 2 answer choices and therefore the punches are '1' (representing males) and '2' (representing females).



**Question Title** – This is a summary of the question. It should be short and descriptive as this is the title that will appear in the dashboard during the Invoke Solutions sessions. In the example ‘Gender’ was chosen as the question title. The Question Title must be identical in all the rows representing a specific question.

**Question text** – This is the question text as it appears in the screener. Note that some screeners are programmed in html format and therefore when question texts are copied they include html tags. If html tags (for example nbsp;) appear in the question text they will appear in the Invoke Solutions dashboard as they are not translated. A good practice would be to leave only the actual text of the question. The Question Text must be identical in all the rows representing a specific question.

**Answer Text** – This is the text of each specific answer. Note that some screeners are programmed in html format and therefore when answer texts are copied they include html tags. If html tags (for example nbsp;) appear in the answer text they will appear in the Invoke Solutions dashboard as they are not translated. A good practice would be to leave only the actual text of the answer for each answer choice. Each row has the relevant answer. In the example the first row is ‘Male’ and the second is ‘Female’.

**Data Type** – Data Type for forced choice questions is always ‘single’ and is identical in all rows representing a specific question.

**Level ID** – Should be left blank.

### **Forced choice (single choice) ‘not to do’ list**

1. Do not assign different Form ID values in rows of the same question.
2. Do not assign different Var ID values in rows of the same question.
3. Do not assign different Question Title values in rows of the same question.
4. Forced choice questions can not have only one answer choice. The minimum is 2.
5. It is not possible to have punches that are not in sequence starting with ‘1’.





6. The letters following the 'cq' can not be 'v' or 'p'. a Form ID that starts with 'cqv' will cause this question to be treated as a video (technical) questions and therefore all the data associated with this question will be discarded. A Form ID that starts with 'cqp' will cause this question to be treated as a video (technical) question and therefore all the data associated with this question will be discarded.

**Multiple choice questions**

The following question:  
 Which of the following do you currently own and use? (Select all that apply)  
 - Personal computer  
 - DVD player  
 - Ink jet printer  
 - none of the above

Will have the following values in the excel definition file:

Form ID	Var ID	Start Col	End Col	Punch	Question Title	Question Text	Answer Text	Data Type	Level ID
cq4	cq4_1	25	25	1	Currently own	Which of the following do you currently own and use?	Personal computer	multi	
cq4	cq4_2	26	26	1	Currently own	Which of the following do you currently own and use?	DVD player	multi	
cq4	cq4_3	27	27	1	Currently own	Which of the following do you currently own and use?	Ink jet printer	multi	
cq4	cq4_99	28	28	1	Currently own	Which of the following do you currently own and use?	none of the above	multi	



### Detailed explanation:

**Form ID** - Every closed ended question starts with the letter combination cq (in lower case) that is representing 'closed question'. After these 2 letters it is possible to use any combination of letters and numbers. In this example we used the number 4 just for sequence purposes. Best practice is the use numbers as in this example as it simplifies things and also makes it easy to relate the question to the question in the screener according to its number (Example - It was also possible to call it cqown). The Form IDs for all the rows of a specific question are identical.

**VarID** - The Var ID for multiple choice questions is different for each answer of the question. Each Var ID starts with the Form ID and then followed by an under score followed by the punch number in the sequence. The name convention is as follows - cq<question identifier>\_<punch>. In the example you can see that the Var ID of the first punch is cq4\_1, punch 2 is cq4\_2 as so on.

The special cases are the following answer choices: 'Other', 'Don't know' and 'None of the above' those 3 get a special numerical code instead of a punch number in the sequence.

'other' - 97

'Don't know' - 98

'None of the above' - 99 (as seen in the example).

The restrictions regarding those special punches are:

- 1) If there is more than one special option only one can be chosen.
- 2) If there is a regular punch chosen it is invalid that one of the special would be chosen as well.

**Start Col** - Redundant. Can be filled with any numerical value.

**End Col** - Redundant. Can be filled with any numerical value.

**Punch** - For Multiple choice questions all the punches are set to '1' as the punches numbers are reflected in the Var ID as mentioned above.

**Question Title** - This is a summary of the question. It should be short and descriptive as this is the title that will appear in the dashboard during the Invoke Solutions sessions. In the example 'Currently own' was chosen as the question title. The Question Title must be identical in all the rows representing a specific question.



**Question text** - This is the question text as it appears in the screener. Note that some screeners are programmed in html format and therefore when question texts are copied they include html tags. If html tags (for example nbsp;) appear in the question text they will appear in the Invoke Solutions dashboard as they are not translated. A good practice would be to leave only the actual text of the question. The Question Text must be identical in all the rows representing a specific question.

**Answer Text** - This is the text of each specific answer. Note that some screeners are programmed in html format and therefore when answer texts are copied they include html tags. If html tags (for example nbsp;) appear in the answer text they will appear in the Invoke Solutions dashboard as they are not translated. A good practice would be to leave only the actual text of the answer for each answer choice. Each row has the relevant answer. In the example the first row is 'Personal computer' and the second is 'DVD player and so on. In this case the only special option included is 'None of the above'

**Data Type** - Data Type for multiple choice questions is always 'multi' and is identical in all rows representing a specific question.

**Level ID** - Should be left blank.

### Multiple choice 'not to do' list

1. Do not give different Form ID values in rows of the same question.
2. Var ID must be according to the convention cq<question identifier>\_<punch> and punch should start with '1' go on in sequence. Only the special options can be out of the sequence but must be at the end and not breaking the sequence. For example:  
cq4\_1  
cq4\_98  
cq4\_97  
cq4\_3  
this setup is invalid for 2 reasons: sequence broken and special options not in sequence. The proper way would be:  
cq4\_1  
cq4\_2  
cq4\_97  
cq4\_98
3. Do not give different Question Title values in rows of the same question.
4. Multiple choice questions can not have only one answer choice. The minimum is 2.



5. All punches must be '1'.
6. The letters following the 'cq' can not be 'v' or 'p'. A Form ID that starts with 'cqv' will cause this question to be treated as a video (technical) questions and therefore all the data associated with this question will be discarded. A Form ID that starts with 'cqp' will cause this question to be treated as a video (technical) question and therefore all the data associated with this question will be discarded.
7. Multiple choice questions with the option for respondents to select 'other' and than type what 'other' means for them is not supported on our platform. To achieve this kind of question there is a need to break the question into two - multiple choice and open end. Example:  
The multiple choice question -  
Which of the following do you currently own and use? (Select all that apply)
  - Personal computer
  - DVD player
  - Ink jet printer
  - Other

The following open end:  
If you chose 'Other' please let me know what other device you own.

## Grid questions

The following question:  
How many times would you say you have shopped in each of the following types of retail stores within the past 6 months?

	None	1 time	2-3 times	4-5 times	6 times or more
Home electronics store					
Clothing					

Continued in the next page



will have the following values in the excel definition file:

Form ID	Var ID	Start Col	End Col	Punch	Question Title	Question Text	Answer Text	Data Type	Level ID
cq7	cq7_1	38	38	1	Retail store shopping	How many times...	Home electronics store - None	grid	
cq7	cq7_1	38	38	2	Retail store shopping	How many times...	Home electronics store - 1 time	grid	
cq7	cq7_1	38	38	3	Retail store shopping	How many times...	Home electronics store - 2-3 times	grid	
cq7	cq7_1	38	38	4	Retail store shopping	How many times...	Home electronics store - 4-5 times	grid	
cq7	cq7_2	38	38	5	Retail store shopping	How many times...	Home electronics store - 6 times or more	grid	
cq7	cq7_2	38	38	1	Retail store shopping	How many times...	Clothing - None	grid	
cq7	cq7_2	38	38	2	Retail store shopping	How many times...	Clothing - 1 time	grid	
cq7	cq7_2	38	38	3	Retail store shopping	How many times...	Clothing - 2-3 times	grid	
cq7	cq7_2	38	38	4	Retail store shopping	How many times...	Clothing - 4-5 times	grid	
cq7	cq7_2	38	38	5	Retail store shopping	How many times...	Clothing - 6 times or more	grid	

Continued in the next page



### Detailed explanation:

**Form ID** - every closed ended question starts with the letter combination cq (in lower case) that represents a 'closed question'. After these 2 letters it is possible to use any combination of letters and numbers. In this example we used the number 7 just for sequence purposes. Best practice is the use numbers as in this example as it simplifies things and also makes it easy to relate the question to the question in the screener according to its number (Example - It was also possible to call it cqshopping). The Form IDs for all the rows of a specific question are identical.

**VarID** - The Var ID for a grid question is similar within each attribute of the grid but different among the attributes. Each Var ID starts with the Form ID and is then followed by an under score followed by the attribute number. The name convention is as follows - cq<question identifier>\_<attribute #>. In the example you can see that the Var ID of the first attribute is cq7\_1 (first 5 rows) and attribute 2 is cq7\_2 (last 5 rows).

**Start Col** - Redundant. Can be filled with any numerical value.

**End Col** - Redundant. Can be filled with any numerical value.

**Punch** - In grid questions the punches are reflected the same way they are reflected in forced choice questions within each attribute. The number of punches is the number of points in the scale that is presented to respondents. For each attribute the sequence is restarted. In the example we have 2 attributes and a 5 point scale. Therefore the punches are 1-5 for attribute 1 (Home electronics store) and the same for attribute 2 (Clothing).

**Question Title** - This is a summary of the question. It should be short and descriptive as this is the title that will appear in the dashboard during the Invoke Solutions sessions. In the example 'Currently own' was chosen as the question title. The Question Title must be identical in all the rows representing a specific question.



**Question text** – This is the question text as it appears in the screener. Note that some screeners are programmed in html format and therefore when question texts are copied they include html tags. If html tags (for example nbsp;) appear in the question text they will appear in the Invoke Solutions dashboard as they are not translated. A good practice would be to leave only the actual text of the question. The Question Text must be identical in all the rows representing a specific question. For grid questions there is one Master question that is identical for all the attributes.

**Answer Text** – The answer text for a grid question is unique as it is comprised of 2 objects – the attribute and the scale. The number of answers for each attribute is the number of points in the scale that is identical for all attributes. The convention of the answer text for grid question is <attribute> - <scale point> this convention (with the dash in between the attribute and the scale point) must be adhered to or the data will not be displayed correctly in the Invoke Solutions dashboard.

In the example the first attribute is 'Home electronics store' and the scale is as follows: None, 1 time, 2-3 times, 4-5 times, 6 times or more.

Therefore the 5 answers for this attribute in the grid are:

Home electronics store - None

Home electronics store – 1 time

Home electronics store – 2-3 times

Home electronics store – 4-5 times

Home electronics store – 6 times or more

The only difference for the next set of 5 answers for the second attribute is that the word 'Clothing' replaces 'Home electronics store'

Clothing- None

Clothing– 1 time

Clothing– 2-3 times

Clothing– 4-5 times

Clothing– 6 times or more

**Data Type** – Data Type for multiple choice questions is always 'grid' and is identical in all rows representing a specific question.

**Level ID** – Should be left blank.

## Grid 'not to do' list

1. Do not give different Form ID values in rows of the same question.
2. Var ID must be according to the convention cq<question identifier>\_<attribute #>. Each attribute of the grid should get its own number starting with '1' in ascending sequence.



3. Do not give different Question Title values in rows of the same question.
4. Grid questions can not have only one attribute. The minimum is 2. A grid question with one attribute only is a forced choice question and should be created as such.

## Open end questions

The following question:

Please type in your zip code.

Will have the following values in the excel definition file:

oq14	oq14	78	78	1	Zip code	Please type in your zip code.		opentext	
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### Detailed explanation:

**Form ID** - every open ended question starts with the letter combination oq (in lower case) that is representing 'open question'. After these 2 letters it is possible to use any combination of letters and numbers. In this example we used the number 14 just for sequence purposes. Best practice is the use numbers as in this example as it simplifies things and also makes it easy to relate the question to the question in the screener according to its number (Example - It was also possible to call it cqzip). Open questions have only one row in the excel definition file.

**VarID** - The Var ID for open ended questions is identical to the Form ID.

**Start Col** - Redundant. Can be filled with any numerical value.

**End Col** - Redundant. Can be filled with any numerical value.

**Punch** - Open ended questions have no answer choices and therefore no punches. Still, this field cannot be left blank and needs to be filled with the number '1'.





**Question Title** - This is a summary of the question. It should be short and descriptive as this is the title that will appear in the dashboard during the Invoke Solutions sessions. In the example 'Gender' was chosen as the question title.

**Question text** - This is the question text as it appears in the screener. Note that some screeners are programmed in html format and therefore when question texts are copied they include html tags. If html tags (for example nbsp;) appear in the question text they will appear in the Invoke Solutions dashboard as they are not translated. A good practice would be to leave only the actual text of the question.

**Answer Text** - Open ended questions do not have answer text as they do not have answers. This field should be left blank.

**Data Type** - Data Type for open end questions is always 'opentext'.

**Level ID** - Should be left blank.

### Open ended 'not to do' list

1. Do not leave the punch field blank. Although open ended questions don't have a punch this field should be filled with the number 1.
2. Form ID and var ID should start with 'oq' and not with 'cq'.



## Segments – implementations and implications

### Introduction

During the live session some of the screener data might have more relevance and importance than some other data. Sometimes quotas (will be referred to as segments) are created behind the scenes without the respondent having to answer any question. Those segments are created using responses already submitted by the user and often combine responses of a few questions into one segment. In some cases segments are used to collapse a question with many options into a segment with fewer groups created from those options. Those 'behind the scene questions' will be referred to as 'hidden questions' as they are hidden from the respondents.

### Hidden questions

Following are 2 examples of how hidden questions might be set up in a screener:

#### Example 1 – creating a new quota from 2 questions

Are you:

- Male
- Female

Please select the age group you fall into:

- 20-24
- 25-29
- 30-34
- 35-39
- 40-49

After those two questions instructions are given to the person creating the screener to create a hidden question creating the following segment:

Hidden question:

- Male 20-29
- Male 30-39
- Male 40-49
- Female 20-29
- Female 30-39
- Female 40-49

Six groups were created out of the two questions. This hidden question will not be presented to respondents.



### Example 2 – Collapsing one question into smaller groups

Please select the age group you fall into:

- 20-24
- 25-29
- 30-34
- 35-39
- 40-44
- 45-49
- 50-54
- 55-59
- 60-64
- 65-69

After this question instructions are given to the person creating the screener to create a hidden question creating the following segment:

Hidden question:

- 20-29
- 30-39
- 40-49
- 50+

10 Age group options were collapsed into four age groups. This hidden question will not be presented to respondents.

All the questions set in the excel definition file and the matching respondent data in the PSF are imported into the Invoke Solutions Dashboard for each respondent that logs into the session. Some of the questions within the excel definition file can be declared (or created as) Segments. Segment questions are very similar to all other screener data questions but allow for some more functionality.

The added functionality of segment questions:

1. Segment information appears when hovering over open end responses during the session.
2. Filtering by segment is optional as an 'always on' filter.
3. Each answer within a segment question will appear as a banner point in the Excel consolidated report at the conclusion of the project. This can save time and costs of data processing.

Usually hidden questions will be declared as segments as they give respondents the added value of having this data about respondents during the live session.



## Creating segments in the excel definition file

If the excel definition file is under construction is very simple to create a question as a segment. One thing to remember is that only forced choice questions and multiple choice questions can be created as segments.

To convert a forced choice question into a segment simply add the word 'quota' to the Form ID and var ID.

Following is an example of the forced choice question that was shown above converted into a segment:

Form ID	Var ID	Start Col	End Col	Punch	Question Title	Question Text	Answer Text	Data Type	Level ID
cq\quota	cq\quota	1	1	1	Gender	Are you:	Male	single	
cq\quota	cq\quota	1	1	2	Gender	Are you:	Female	single	

For forced choice questions:

simply append the word 'quota' at the end of the Form ID and Var ID.



Following is an example of the Multiple choice question that was shown above converted into a segment:

Form ID	Var ID	Start Col	End Col	Punch	Question Title	Question Text	Answer Text	Data Type	Level ID
cq4quota	cq4quota_1	25	25	1	Currently own	Which of the following do you currently own and use?	Personal computer	multi	
cq4quota	cq4quota_2	26	26	1	Currently own	Which of the following do you currently own and use?	DVD player	multi	
cq4quota	cq4quota_3	27	27	1	Currently own	Which of the following do you currently own and use?	Ink jet printer	multi	
cq4quota	cq4quota_4	28	28	1	Currently own	Which of the following do you currently own and use?	none of the above	multi	

For multiple choice questions:

For the Form ID simply append the word 'quota' at the end of it.

For the Var ID the word 'quota' should be added before the underscore and the attribute number according to the following convention

cq<question identifier>quota\_<attribute number>



## Creating hidden segments in the excel definition file

Creating the segment as hidden is done for one purpose only – to distinguish the question as hidden so it is known that this was created ‘behind the scenes’ and not presented to respondents. Hidden segments are identical to regular segments as were shown above.

To make this distinction between a regular segment and a hidden one simply add the letter ‘hid’ to the word ‘quota’ to form the combination ‘quotahid’.

## Excel definition file general rules and limitations

1. Maximum number of characters in title field: 1-100
2. Maximum number of characters in question text field: 1-400
3. Maximum number of characters in Answer text field: 1-400
4. Maximum number of answers to forced choice and multiple questions: 25
5. Maximum number of attributes in a grid question: 10
6. Maximum number of points in a grid question scale: 7
7. Excel file should include only one spreadsheet called ‘field\_def’
8. All closed ended questions must start with cq in lower case.
9. All open ended questions must start with oq in lower case.
10. Each question should have only one title.
11. Punches for a forced choice and grid questions must start with ‘1’ and be in sequence.



## Importing the screener data into the PSF

The excel definition file is only the layout of information to be imported into the data. Once the excel definition is in place it is now possible to get to the PSF. The PSF is the 'Panel session file' or the 'Participant session file' and holds in it the information regarding all the respondents per specific session. Per each respondent the PSF holds 2 different kinds of information:

1. Technical session information:

- User ID
- Password
- Nickname
- time zone
- Incentive Sum
- Over recruiting sum
- e-mail (if necessary)

2. Screener data information:

This section holds for each respondent all his screener answers per each question that is defined in the excel definition file.

## Creating the screener data section in the PSF

### General

The screener data section in the PSF starts at column I and goes to the right as much as necessary. This area is divided into two main sections:

1. The header row – the headers are located in row 1 in continuation to the headers of the technical information.
2. Answer data – In each respondent's row data is populated according to the right question.



## Creating the headers

It is very easy to tell how many Columns will be needed in the header row and what is the header in each of the columns. The way to do that is to look at the VAR ID column in the Excel definition file. Each DIFFERENT entry should be represented in its own column in the PSF as a header.

Example:

Assuming this is the Var ID column in the excel definition file:

Var ID	Data Type
cq1	single
cq1	single
cq1aquotahid	single
cq1aquotahid	single
cq2	single
cq2	single
cq2	single
cq2	single
cq2	single
cq2aquotahid	single
cq2aquotahid	single
cq3_1	multi
cq3_2	multi
cq3_3	multi
cq4_99	multi
cq4_1	grid
cq4_1	grid
cq4_1	grid
cq4_1	grid
cq4_1	grid
cq4_2	grid
cq4_2	grid
cq4_2	grid
cq4_2	grid
cq4_2	grid
cq4_3	grid
cq4_3	grid
cq4_3	grid
cq4_3	grid
cq4_3	grid
oq5	opentext

The second column is for illustration purposed only so it will be obvious what the question type is.





This is how the header row will look like in the PSF starting from column I:

cq1	cq1aquotahid	cq2	cq2aquotahid	cq3_1	cq3_2	cq3_3	cq3_99	cq4_1	cq4_2	cq4_3	oq5
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As was mentioned above, only different entries make their way to be headers in the header row.

Rule of thumb:

Forced choice question - only one column/header. The numerical value of the punch that the respondent chose will be filled in this column in each respondent row.

Open end question - only one column/header. The actual text the respondent typed as a reply to that question will be filled in this column in each respondent row.

Multiple choice question - number of columns/headers is the number of optional answers for this question. Each column represents one possible answer choice. In each column the values will be either '1' or '0'. If the value in a specific row is '1' it means that the respondent chose this answer choice. '0' means this answer was not chosen.

Grid question - number of columns/headers is the number of attributes in the grid. Each column represents one attribute of the grid. The numerical value of the punch that the respondent chose for that specific attribute will be filled in this column in each respondent row.

## Inserting the respondent data

Respondent data is the actual screener data - the information that each respondent supplied while taking the screener. Above there was some general information as to how to fill each of the columns per the different question types. Below is detailed information on how to do it:

## Forced choice questions

A forced choice question is represented by a single column. The possible values in this column are the punches as they are declared for this specific question in the excel definition file. Here is an example of how such column would look according to the example that was given previously in this file for a forced choice question in the excel definition file:



cq1
1
2
2

## Multiple choice questions

A multiple choice question is represented by multiple columns – one per each possible answer for this question. The possible values in each column are either ‘1’ (answer was chosen) or ‘0’ (answer wasn’t chosen). Here is an example of how such columns would like according to the example that was given previously in this file for a multiple choice question in the excel definition file:

cq4_1	cq4_2	cq4_3	cq4_99
1	1	1	0
1	0	0	0
0	0	0	0
1	0	0	0
1	0	1	0

As mentioned before, a respondent can not choose a regular response and a special response (97, 98, 99 series) at the same time. An example for an invalid row would be:

cq4_1	cq4_2	cq4_3	cq4_99
1	0	0	1

This row means that this user chose answer choice number 1 and at the same time the answer represented by 99 which is ‘None of the above’. This is invalid.

## Grid questions

A grid choice question is represented by multiple columns – one per each attribute in this question. The possible values in this column are the punches as they are declared for each specific attribute (same for all attributes) in the excel definition file. Here is an example of how such columns would like according to the example that was given previously in this file for a grid question in the excel definition file:

cq7_1	cq7_2	cq7_3
2	5	4
2	2	2
4	3	4
4	1	1
2	5	2
3	1	4



## Open end questions

An open end question is represented by one column only. The possible values in this column are the text entries typed in by the respondents. Here is an example of how such column would look according to the example that was given previously in this file for an open end question in the excel definition file:

oq14
06901
06902
06903
06904
06905

## PSF general rules and limitations

1. The header row of the screener data section in the PSF should reflect every different entry in the Var ID column in the excel definition file.
2. Empty cells in the PSF should not contain spaces.
3. Extra spaces that are appended to values in the PSF should be trimmed so that there are no extra unnecessary spaces.

