

Questionnaire Builder Toolbar - User Guide

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Thanks...

...for trying out this tool! This has been developed over many years of actual use as a supplier side market researcher. But of course it can be modified and features added or removed or changed to fit your needs. Using this toolbar will give you a good idea of the kinds of automation capabilities we can implement within Word.

This tool is meant to assist the user. It does not create a questionnaire all at once, but gives you formatting tools and other time-saving shortcuts as you go through the process. You can *always* use regular Word features.

Accessing the Toolbar

When the toolbar is installed according to the Instructions, each time you start Word, you will see a tab entitled “Questionnaire” on the far right end of your Word toolbar. Some commands after running will switch you to a different tab. Keep coming back to the “Questionnaire” tab for access to these features while building your questionnaire.

Setting the Content Library Location

The first time you use the Toolbar, you need to set the location of the Content Library. To do this,

1. Utilities
2. Set Content Library
3. Type or use the button to Browse to the location of the Content Library, where the supporting files are located.
4. Click OK, OK to set and accept.

This is a one-time step and only needs to be done the first time you use the Toolbar. The location will be “remembered” and loaded each time you start Word. To change it, simply repeat the above steps.

Toolbar Features

Here is a quick review of the features, from left to right on the toolbar.

Document group

New Questionnaire

Click on this button to start a new questionnaire. A dialog box will ask whether you want to include certain boilerplate sections on the first page. Un-check to deselect those. Your choices will be remembered for next time.

The new questionnaire will be based on the template in the Content Library. If you want, the template can be customized with your logo and other content you typically include at the top of each questionnaire.

Study Team

The default template has placeholders (“content controls”) for contact information (name, title, email, phone) for up to four team members at the top of page 1. Actually, you can have up to 9 names. If no blank spaces are available they will be added first, even if you have deleted the entire section. Select a name to automatically add that person in the next available slot. This list is drawn from QreToolbarInfo.xlsx, a spreadsheet kept in the Content Library. You can replace the generic demo names with your own staff information. You can update this at any time and the toolbar will read the latest worksheet when it is loaded.

New Section

Inserts a new section for the questionnaire, with larger font and underline. Before running this command, make sure your cursor is where you want the new section to be added. Default is to start the section at the top of the next page, but you can un-check this to start it on the same page. For some section headers, you will be given the option of inserting common boilerplate text at the top of that section. This boilerplate can be modified; contact Bryce for how to do that.

Questions group

In this format, each survey question consists of 3 main parts.

1. Base note
2. Question itself, followed by respondent instructions, if any
3. Response table

[BASE: ALL RESPONDENTS]		
Q1. Which of these US cities have you visited? <i>Please select all that apply.</i>		
<input type="checkbox"/>	1	Atlanta
<input type="checkbox"/>	2	Chicago
<input type="checkbox"/>	3	Denver
<input type="checkbox"/>	4	Las Vegas
<input type="checkbox"/>	5	New York
<input type="checkbox"/>	6	San Francisco
<input type="checkbox"/>	7	St. Louis

Each question number is contained within an invisible Word placeholder known as a “content control.” Please don’t remove or change these controls (except at the very end if you want) because they are used by several toolbar functions such as renumbering questions.

[Q]	[BASE: ALL RESPONDENTS]	
Q1.	Which of these US cities have you visited? <i>Please select all that apply.</i>	
<input type="checkbox"/>	1	Atlanta
<input type="checkbox"/>	2	Chicago
<input type="checkbox"/>	3	Denver
<input type="checkbox"/>	4	Las Vegas

The buttons in this and the next toolbar group are used to create questions and responses.

Add Question

Inserts the base note, question number, and a placeholder for the question text. Choose from S (screener), Q (question) or D (demographic), or add other letters if you wish. Before using this command, make sure your cursor is where you want the question to appear. A new question will be added with the letter chosen, and it will automatically have the correct question number.

Make Qref

Create a “question reference” for text that refers to another question. Select the letter and number referring to the question, then click this button to create a “QRef.” From now on, any time the question you are pointing to gets

renumbered, the Qref text will also be changed to match. In the following example, the “S3” in the base note of question S4 is flagged as a QRef, so when we remove the original S2, what was S3 gets renumbered to S2, and the QRef is renumbered also. Actual QRefs are *not* highlighted in yellow, they are highlighted below only for visibility.

[BASE: ALL RESPONDENTS]

S1. What is your age?

[BASE: ALL RESPONDENTS]

S2. Do you work in the advertising or market research industry?

[BASE: ALL RESPONDENTS]

S3. What is your role in making decisions for soft drink purchases in your household?

[BASE: INVOLVED EQUALLY IN DECISIONS (S3 = 2)]

S4. Who does most of the grocery shopping for your household?

If we decide to remove the second question and renumber the questions, the Qref is also updated

[BASE: ALL RESPONDENTS]

S1. What is your age?

[BASE: ALL RESPONDENTS]

S2. What is your role in making decisions for soft drink purchases in your household?

[BASE: INVOLVED EQUALLY IN DECISIONS (S2 = 2)]

S3. Who does most of the grocery shopping for your household?

Prog Inst

In this questionnaire format, programmer instructions appear in **[ALL CAPS, BOLDED, WITHIN BRACKETS]**. Programmer instructions include base notes and any other setup or logic or routing instructions you would put before or after the response table. Click on this button for a dropdown list of commonly used programmer instructions. These come from the spreadsheet and are easy to update there, or you can always enter an instruction manually.

Please select

This button simply inserts one of the following canned phrases at the current cursor. Select from the dropdown.

Please select one answer.

Please select all that apply.

Please select one answer per row.

Please select all that apply in the left column, then indicate on the right which ONE is most important to you.

In this format, respondent instructions are in italics, body font size, and appear immediately following the question text itself.

Toggle multi-part question

Turns the selected question number from a regular number to a number and letter. Can also change back to regular numbering. First, select the content control containing the question number you want to update, then click this button.

[BASE: ALL RESPONDENTS]
D1. How many people live in your household

[BASE: ALL RESPONDENTS]
D2. Do any children under 18 live in your household?

[BASE: ALL RESPONDENTS]
D3. What is your household's annual income?



[BASE: ALL RESPONDENTS]
D1A. How many people live in your household

[BASE: ALL RESPONDENTS]
D1B. Do any children under 18 live in your household?

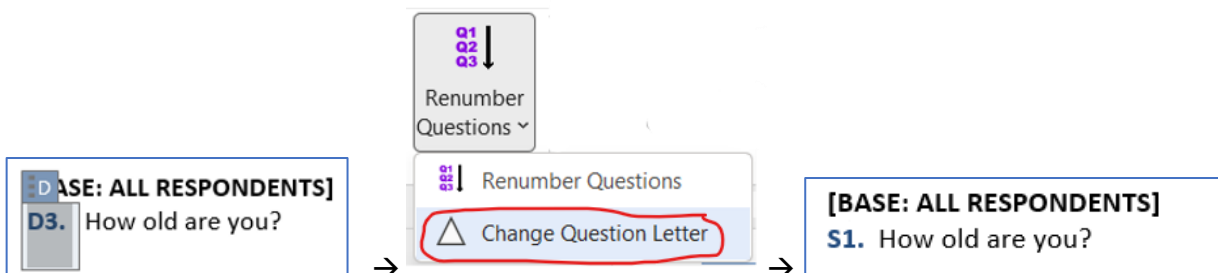
[BASE: ALL RESPONDENTS]
D2. What is your household's annual income?

Renumber Questions

When you add a new question, either at the end of your document, or between two pre-existing questions, they are automatically renumbered, and the new question gets the correct number. But if you delete or move one or more questions, you should use this button to renumber those that remain. Click the button to renumber all questions, or choose just one section to renumber. I typically use this in the early stages of questionnaire development before things have been finalized. If the questionnaire has already gone to programming, or if is a new tracking wave, you probably will *not* want to renumber questions, rather insert new question numbers between existing.

Change Question Letter (under renumber dropdown)

You might decide to move a question to a different section, for example, moving a Demographic question up to the Screener. Cut and paste the question using normal Word functionality. Then, after moving the question, select the content control containing its number, select it a second time (the header will turn blue), and choose this command on the toolbar (under renumber dropdown) to change its letter, in this example from a "D" to an "S."



Response Tables group

Blank

In this questionnaire format, a single response question is indicated by a radio button (○), while multi-selects use shown using a check-box (☐). The code punch numbers are shown in subscript next to that. The second column in the item wording itself, while the column on the right is used to indicate logic or skip patterns for certain responses, so it defaults to bolded font.

Enter a response table following each question, either a single select, or multi-select, or other kind of question. Choose how many rows to include initially in your response table (you can always increase or decrease this later using built-in Word functions), select if you want an Other (specify), and other anchored response options at the bottom. For example, these choices on the left would create this table on the right.

Insert Response Table

Question Type

Single Choice

Multiple Choice

Quant OE _____

Response Rows

7

Additional Response Rows at Bottom

Other (please specify) _____

(97) Don't Know Not Sure

(98) Prefer not to say Refused

(99) None of the above None Not Applicable

OK Cancel



<input type="radio"/> 1		
<input type="radio"/> 2		
<input type="radio"/> 3		
<input type="radio"/> 4		
<input type="radio"/> 5		
<input type="radio"/> 6		
<input type="radio"/> 7		
<input type="radio"/> 8	Other (please specify) _____	
<input type="radio"/> 99	None of the above	[EXCLUSIVE]

Rating Question

Use this button to create a table for a Likert scale question. Choose dimension to be measured, number of points, whether you want to label each point (fully labeled=yes) or just the endpoints (fully labeled=no), whether to display the numbers, etc. Select 0 rows for a single horizontal scale table. This feature will give you a table that is easier for you and clients to edit and see what they are getting, instead of more primitive approaches like “show items in rows and show scale points in columns” kinds of instructions. An asterisk shows where boilerplate scale wording is available, but you can always enter your own custom column headers. Boilerplate wording is pulled from an Excel worksheet, and can be easily updated to include your most commonly used scales. Besides saving lots of time, this will result in greater consistency in your use of scales throughout your company.

Add Scale Question

Agreement

Believability

Familiarity

Favorability

Helpfulness

Overall Rating

Satisfaction

2 point scale *

3 point scale

4 point scale *

5 point scale *

6 point scale *

7 point scale

9 point scale

10 point scale

* scale wording available

Fully Labeled?

No

Yes

Clear Boxes

Number of Rows

5

Remove N/A Column

Not applicable

Strongly Disagree

Somewhat Disagree

Nether Agree nor Disagree

Somewhat Agree

Strongly Agree

1

2

3

4

5

Not applicable

99

Show Numbers

Single Choice Multiple Choice

OK Cancel

		Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree	Not applicable
		1	2	3	4	5	99
1	Statement one	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	Statement two	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	Statement three	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	Statement four	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Statement five	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Special Formats

This button provides a dropdown with several commonly used types of questions that require their own unique response format. An editable response table will be inserted. Currently this demo includes the following types of questions, but we could of course add your own formats to this list:

- Open-end response
- Max-Diff table
- Select all, then select one
- Multi select then enter numerical open end
- Divisor scale question
- Net Promoter Score

List to Table

The client may send you a list of responses in a document or even in the body of an email. This button makes it easy to convert such a list (bulleted, numbered, other) into a response table. Select the entire list, then choose to create a new single or multiple response table, or even transfer the list into an existing response table. If the existing table doesn't have enough rows, more will be added.

Edit Response Table

As you edit and revise your response table, you might find the commands available on this dropdown to be useful:

- Renumber (response choices, not questions. Use if you delete some answer choices, or insert some)
- Reverse codes (if, for example, Strongly Agree is currently a 1 punch, but you want it to be a 5)
- 1 column to 2 columns (if you have a very long list and want to reduce how much space it takes)
- 2 columns to 1 column (reverses the above)
- Toggle single/multiple response (changes from one symbol to the other and back again)

Manipulate Table

Mimics built-in Word functionality to easily perform the following functions on your response table:

- Delete table
- Copy table
- Cut table
- Paste table
- Select table
- Left Align
- Center Align
- Right Align
- All Borders On (style has only top and bottom borders, so this can be useful to temporarily turn on all borders so you can see what you're doing)
- Default Borders (back to original)

Question Library group

These functions illustrate how building a library of your commonly used questions can make your work faster and easier. Questions are inserted from Word building blocks, which can contain any text or graphics content. They are maintained in a separate file in the Content Library for ease of updating.

Screener

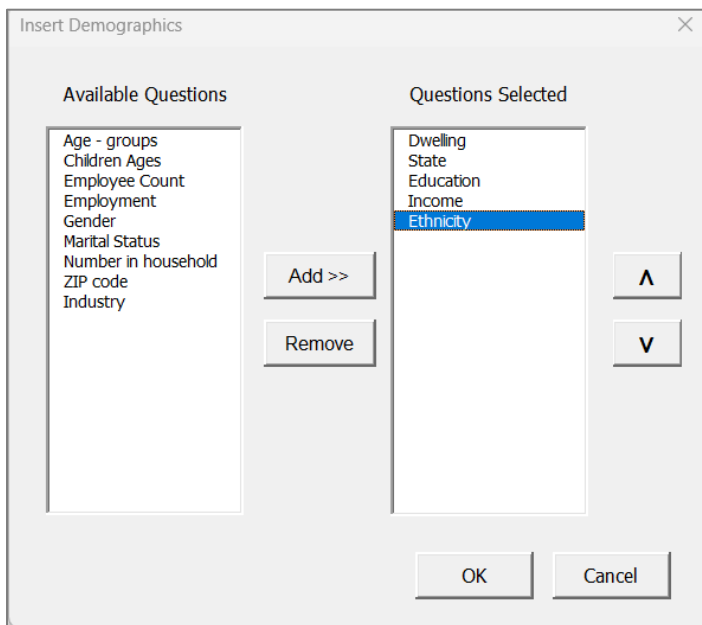
Pulls from a list of pre-built screener questions. You can select desired questions, move them to the right, and re-order them before inserting.

Question

Works very similar to the Screener function.

Demographic

Works very similar to the above two functions.



Utilities group

Utilities

- Set Content Library
 - Use to set or change the folder in which supporting resource files are kept.
- Insert Symbol
 - Insert radio buttons, check marks, blank spaces, narrow dropdown, or wide dropdown. These can have punch numbers next to them if you want, and even be auto-numbered with the increment function.
- Lock Content Controls
 - To make sure other editors do not change or disturb locked content.
- Unlock Content Controls
 - Makes content editable again
- Convert Content Controls to Text
 - Do this when the questionnaire is final and you are sure you will no longer need these controls.
- Reload Toolbar Data
 - Reloads arrays from the Excel worksheet, in case these have been changed during this Word session.

About

Gives information on toolbar and expiration date of the trial version. Click anywhere to close the dialog.