Surveys I Creating a Survey Questionnaire

- **Login** to your FinxS account and **hover over the "Templates" tab** in the menu bar along the top.

- Select **"Open Questionnaires"** – the last item on the dropdown menu.

- **Click on the** ＋ button at the bottom left of the screen.

- **Click on "New Mother".**

- On the screen that comes up, give your questionnaire a **"name".**

- Provide **a "description"** of the questionnaire.

- In "Category", **click on the down arrow** and select **"Research Module / Survey".**

- If you would like the questionnaire to be "cloneable", tick this box. (Cloning would make another copy of the questionnaire that would be independent of the original questionnaire.)

- **Leave "Locked"** ticked for now.

- In the **"Allow Skip" field**, select either "Flexible", "Allow skip" or "Do not allow skip" depending on whether you want to allow the respondents to skip questions or not.

- **Click "Save"** to begin creating the questionnaire.

Open Questionnaires Workplace Culture Research Module

Open Questionnaires	Summary

Name	Workplace Culture Research Module
Type	Mother
Description	Research Module used to assess Workplace Culture
Owner	HRPS Test [Change]
Category	Research Module / Surveys
Cloneable	Yes
Languages available	English (Australasia)
Groups	1
Questions	1
Locked	Yes
Allow to skip question	No
Created / Updated	31.10.2021 23:11:42 / 04.09.2023 04:48:52

[Preview] [Download XLS]   [Clone] [Edit questions] [Edit]

- **Before you start adding questions** to your Survey, ensure the correct name is highlighted in the column on the left. (I.e., the name of the Survey project you've just set up).

- **Tick "Edit Questions"** on the far right of the screen. This will take you into the questionnaire where you can start adding items.

- If you want your questionnaire to have **different groups of questions under headings** like Communication, Time Management, Delegation etc., you should name your question groups in **the column on the left side** of the screen, where it says "New group". You may like to make the first group an 'instructions page'.

- To do so, click on the ✏ in the blue "New group" box and then enter the group name (e.g., " Instructions") in the box that appears beneath. Press "Enter" on your keyboard so the group name saves. (NB: The ⊞ button beside the pencil allows you to change the order of question groups by clicking and moving up or down).
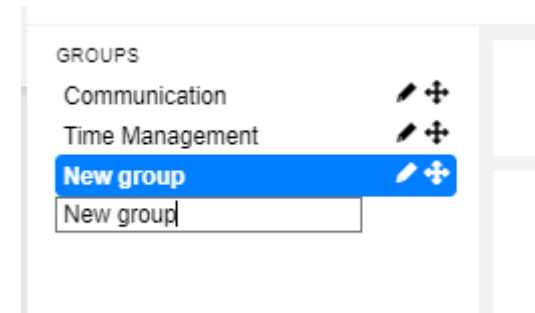
- **To add instructions to the questionnaire,** click and drag "Instructions" from the right-hand column into the middle of the screen and drop to insert them.

- To add text to the box, simply click on "Click here for edit".

    o   Choose whether you want the instructions to "Show only in answering" (i.e. only when people complete the questionnaire) or "Print also in report".

- It is important that the instructions for answering are viewed separately, before the questions are seen, so drag across a **"Page break"** from the column on the right and drop it into the middle of the screen, beneath the instructions section, before starting to add questions.

- To **create additional question groups, so you can enter the headings for each section**, e.g., 'Communication', or 'Leadership', click on the ✛ button again at the bottom left of the screen and a new question group box will appear in the left-hand column. Enter the name of your first question group. Repeat this step when you are ready to create more.

- NB: When you go to add questions to a question group, ensure the correct question group name is highlighted in the column on the left before adding the questions.

- Now you are going to add your first group of questions. To show the name of the group of questions (e.g. 'Communication') to the respondents, **start by dragging "Instructions" over again** from the right-hand column and drop it into the middle of the screen, beneath the page break that you've just inserted. Click on "Click here to edit" to add the question group name/heading. This will alert respondents to the type of questions that will follow.

- Next, **choose the question type** you want to use throughout the whole questionnaire – Open Scale or Likert Scale (Click HERE to view the different question types). Nb: **Do not change the question type or answering scale midway.** The same ones must be used throughout the entire questionnaire.

- **Click and drag the question type** you want (Likert or Open Scale) from the right-hand column into the middle of the screen and drop it beneath the group name.
    - Select if the question is to be "Flexible", "Allow skip" or "Do not allow skip".
    - NB: If you selected "Do not allow skip" when you set up the questionnaire, all the questions will automatically be "Do not allow skip".
    - If you want to allow a question to be skipped, select "Allow skip". You can do this in 'Open ended questions' also.
- Select the Scale Size Where it says "Scale Size" (i.e. the **number** of possible responses you are going to provide the respondents with), select the number from the dropdown menu. (Remember, if you've chosen Likert, you'll only have the option of selecting 3, 5 or 7 response options).

- Directly beneath this, **type in the descriptors you wish to use in the answering scale** e.g. Strongly agree, Agree, Neither agree nor disagree, Disagree, Strongly disagree. Type one descriptor in each line.

- **Remember to put the most favourable choice at the top and the least favourable choice at the bottom.** This is important!

- Now the **basics that you are using for every question** (except any 'Open ended questions' that you may choose to add), have been set up, click on "Clone" on the right (directly across from the 'Flexible' dropdown menu box) and clone this basic question set-up the number of times it will be needed for this question group. I.e. if there are going to be six questions in this group, press clone five times, to get five more question basic set-ups to appear. Otherwise, you'll have to repeat the above process five separate times.

- Follow the steps above again to **add more sections and questions** until your Survey questionnaire is complete.

- If you wish to add an 'Open ended question', simply drag 'Open ended' across from the column on the right and set it up as per the other questions.

- When your questionnaire is finished, **select "Preview"** at the top left to see how the questionnaire will appear to the respondents (Nb: it does not display self-assessing). Edit the questions if any errors are found.

- Now that your Survey questionnaire is ready, **select "Back"** at the top left of your screen, which will take you back to the general set up area of your questionnaire.

- **Click "Edit"** on the far right of the screen and remove the tick next to "Locked".

- To actually use a questionnaire, it must be unlocked.

***Helpful hints*:**

- Don't put people's names or gender in the questions. The questionnaire can then be used again, e.g., put something like: They maintain enthusiasm and interest in their work.
- Always use the same question type (Likert or Open scale) throughout the whole questionnaire.
- Always use the same answering scale e.g. Excellent, Very Good, Good, Poor, Very Poor.
- Keep the questionnaire and questions short. If a questionnaire is too long people will disengage.
- Only ask one question within a question. E.g., 'This person communicates well verbally and non-verbally' is actually two questions.
- Once the respondents have started answering the questionnaire, editing the questions is no longer possible.