Chisquares

Chisquares

Author:	Your name
Date:	2025-05-28

Contents

Getting Started / What is Chisquares?

Chisquares is an all-in-one research platform designed to dramatically reduce the time and complexity required to analyze data and publish scientific manuscripts. By integrating powerful tools for data management, analysis, visualization, and collaborative writing, Chisquares allows researchers to move seamlessly from raw data to finished manuscript — all in one environment.

Chisquares supports:

- Data collection, automated processing and visualization
- Sample size and sampling
- Data analysis without coding
- AI-assisted manuscript writing (via CollaboWrite)
- AI-assisted generation of research proposals and research questions (via the AI toolkit)
- Secure multi-user collaboration

When to Use It

Use Chisquares when you want to:

- Collect, clean, transform, and analyze data
- Collaboratively write research manuscripts

- Automate repetitive analysis
- Work with public health survey datasets (e.g., NHANES, GYTS)

Who Is It For?

Chisquares is designed for:

- Individuals or organizations seeking to collect data via surveys
- Researchers analyzing survey or epidemiological data
- Graduate students and academic authors preparing manuscripts
- Public health professionals conducting field research
- Journal editors and peer reviewers collaborating on article drafts

Where to Access the Platform

Chisquares is a web-based platform. You can access it via any modern browser by visiting:

https://www.chisquares.com

After logging in, you will land on your **Dashboard,** where you can:

- Create or join projects
- Start and launch your survey
- Upload datasets for analysis
- View collaborator activity

- Launch CollaboWrite to begin manuscript preparation
- Develop research proposals or formulate research questions

Why Chisquares?

Chisquares solves the fragmentation of the research workflow. Instead of switching between different tools, Chisquares gives you:

- All tools in one place for data collection, cleaning and visualization
- No-code statistical analysis
- Integrated citation and preprint publishing
- Automated manuscript generation
- Real-time role-based collaboration

Creating Your First Project

What Is a Project?

A project in Chisquares is a shared workspace where collaborators work on the same survey, manuscript or dataset. It contains everything you need to:

- Manage the core task, whether it is data collection, analysis, or writing
- Manage collaborators
- Track progress

How to Create a Project

1. **Click the "New" button** on the dashboard.
2. **Enter a Project Title** — required.

Max 250 characters

3. **Add Keywords** to aid in organization and search.

Use commas to separate

4. **Invite Collaborators** (optional)

- Enter email addresses
- Assign roles (e.g., Co-author)

5. **Confirm Setup** — Click "Create Project."

Who Can Create Projects?

Any registered user. However:

- Only the **Project Owner** can lock/unlock, publish, or delete.
- Other collaborators can view or edit depending on their role.

Managing Project Roles & Permissions

What Are Roles in Chisquares?

Roles determine what each user can do in a project. They help protect your data, organize responsibilities, and support team accountability.

Available Roles

- **Project Owner:** Full control. Can publish, lock/unlock, delete, invite/remove collaborators.
- **First Author / Co-First Author:** Leads manuscript writing and data analysis.
- **Senior Author:** Typically a senior researcher.
- **Statistician / Data Analyst:** Runs analyses and generates tables/figures.
- **Co-Author:** Assists in writing and editing.
- **Literature Reviewer:** Adds citations and background context.
- **Copy Editor / Proofreader:** Reviews for grammar, clarity, structure.
- **Policy Expert / Reviewer:** Adds interpretation and impact insights.
- **Admin Staff:** Non-author contributors.

How to Assign or Change Roles

1. Open your project and go to **Project Settings.**

2. Scroll to the **Collaborators** section.

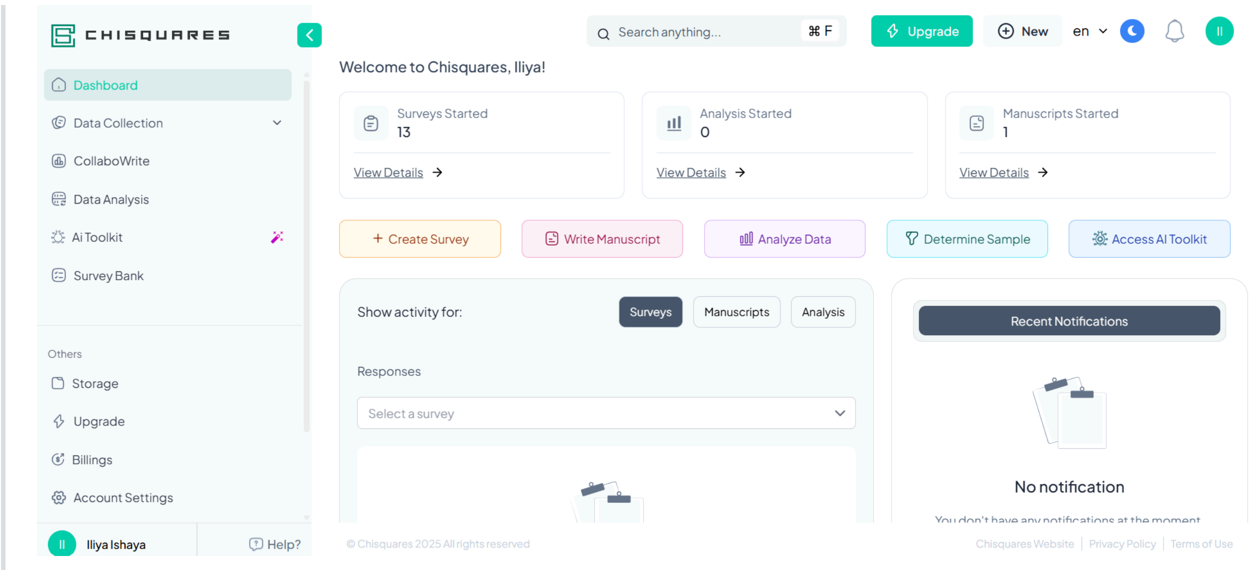
3. Use the dropdown next to each person's name to assign their role.

4. Click **Save Changes.**

Getting Started / Chisquares Dashboard

Welcome to the **Chisquares Dashboard**—your centralized command center for managing all aspects of your research journey. Designed for researchers, analysts, and academic professionals, this dashboard provides a seamless interface to initiate surveys, write manuscripts, analyze data, and harness AI-powered tools — all in one place.

Whether you are a seasoned researcher or a beginner, Chisquares ensures a streamlined workflow that saves time and enhances accuracy, enabling you to focus on what truly matters: gaining actionable insights and driving impactful decisions.



Features

Surveys Started

Monitor the number of surveys you've launched.

Action: Click **View Details** to explore individual surveys and their progress.

Analyses Started
Keep tabs on how many data analyses have been initiated.
Action: Select **View Details** to delve into analysis specifics.

Manuscripts Started
Track your writing progress and manage manuscript drafts.
Action: Use **View Details** for manuscript-related activity.

To-Do Tasks
Stay organized with a smart task tracker for pending activities.
Action: Navigate to **View Details** for an actionable checklist.

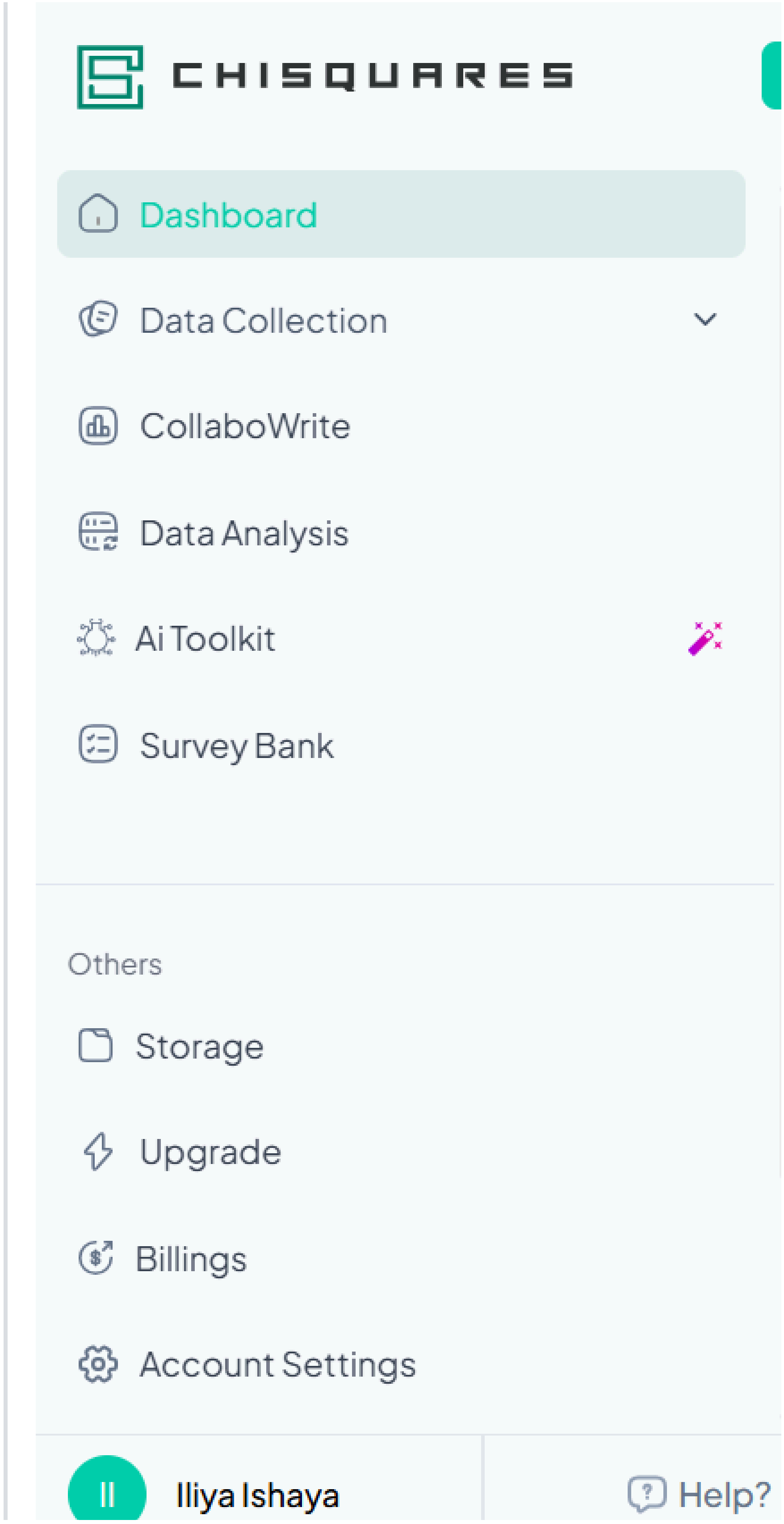
Quick Action Buttons

Effortlessly jumpstart your tasks:
Create Survey – Launch a new survey in just a few clicks.
Write Manuscript – Begin composing your research paper.
Analyze Data – Kick off detailed analysis from collected responses.
Determine Sample – Use statistical tools to define your sample size.
Access AI Toolkit – Leverage AI features for smarter writing and insights.

Navigation Bars

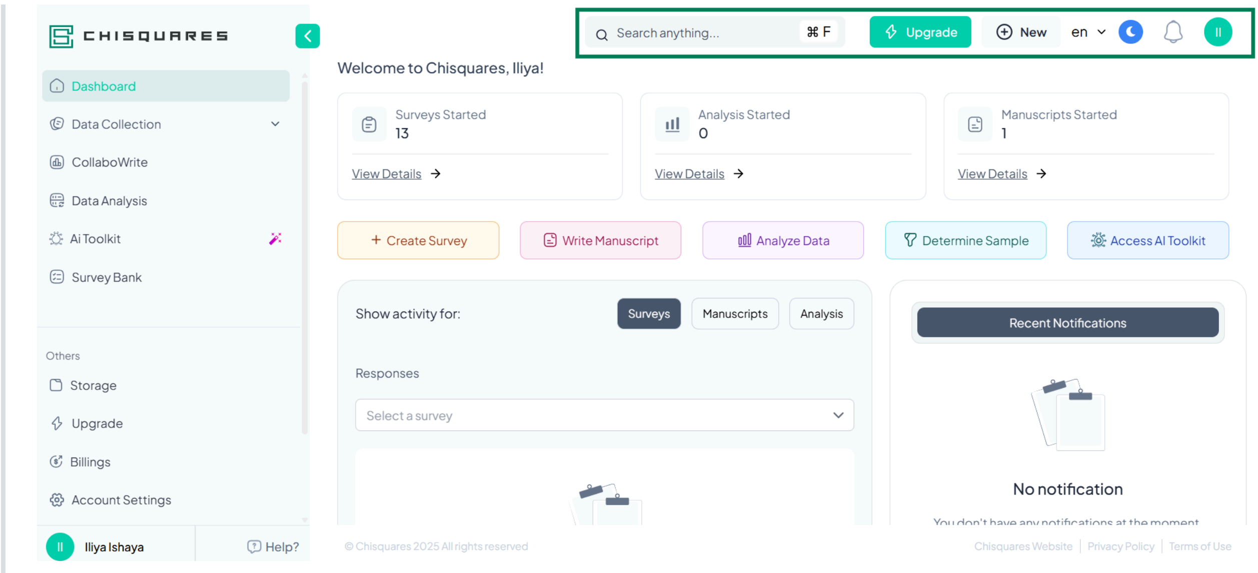
Sidebar (Left Panel)

The left sidebar navigation in Chisquares is your primary tool for accessing the platform's features. Outline below are the menu items and their submenus:


CHISQUARES
Dashboard
Data Collection
CollaboWrite
Data Analysis
Ai Toolkit
Survey Bank
Others
Storage
Upgrade
Billings
Account Settings
II
Iliya Ishaya
Help?

Navigate through all core sections of the platform:
Dashboard – Your homebase overview.
Data Collection – Design and distribute surveys.
CollaboWrite – Collaborate and compose manuscripts.
Data Analysis – Process and interpret data with built-in tools.
AI Toolkit – Access machine-learning capabilities for enhanced productivity.
Survey Bank – Review, reuse, or revise your existing surveys.
Workspaces – View or create collaborative environments.
Storage – Manage files and documents.
Upgrade – Review plans and activate premium features.
Billings – Monitor invoices and subscription status.
Account Settings – Customize your profile and preferences.

Top Bar



Search – Quickly find any item using keywords.
Notifications – Stay updated with real-time alerts.
Profile Menu – Manage account, language preferences, and session.
New Button (+) – Instantly start new surveys, documents, or projects.
Upgrade Button – Highlighted for visibility when on a free plan.

Additional Information

Notifications Panel

Stay informed on all major actions and updates:

Payment Processing – Confirmations and updates on transactions.

Subscription Alerts – Renewal notices and plan updates.

Survey Activity – Completion, closures, and modifications.

System Messages – Important platform-wide changes or reminders.

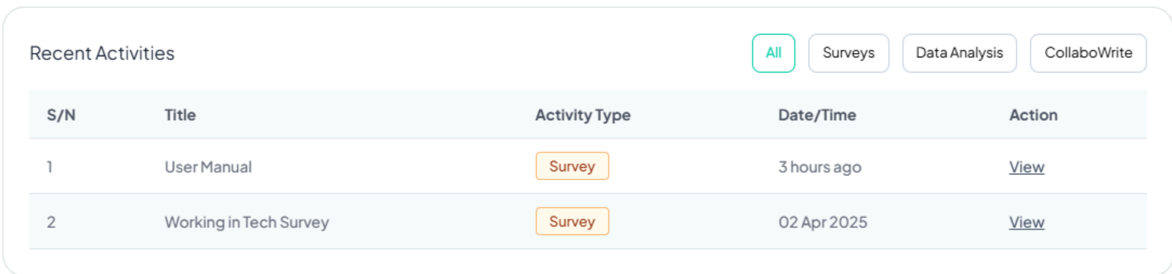
Switch between **Notifications** and **Pending Tasks** for a full overview of your responsibilities.

Survey Insights Panel

Once you begin collecting responses, this section will populate with real-time insights and visual trends. Select from **Surveys, Manuscripts,** or **Analyses** to toggle relevant statistics.

Recent Activities

The Recent Activities section provides a summary of the latest activities you've interacted with or created, such as surveys or documents. This section helps you track and quickly access your most recent work.



Filter Options for Recent Activities

Located in the top-right corner, these buttons allow you to filter the displayed activities:

All – Displays all recent activities, regardless of type.

Surveys – Filters and displays only activities tagged as surveys.
Data Analysis – Displays only data analysis activities.
CollaboWrite – Filters for collaborative writing projects.

Conclusion

The Chisquares Dashboard is engineered to streamline your research workflow with clarity and control. From launching surveys to crafting manuscripts and analyzing results, everything you need is a click away. Explore, create, and manage your projects efficiently through an interface that's intuitive, powerful, and built with researchers in mind.

For further assistance, access the **Help?** button in the lower-left for extended support.

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / Add New Item

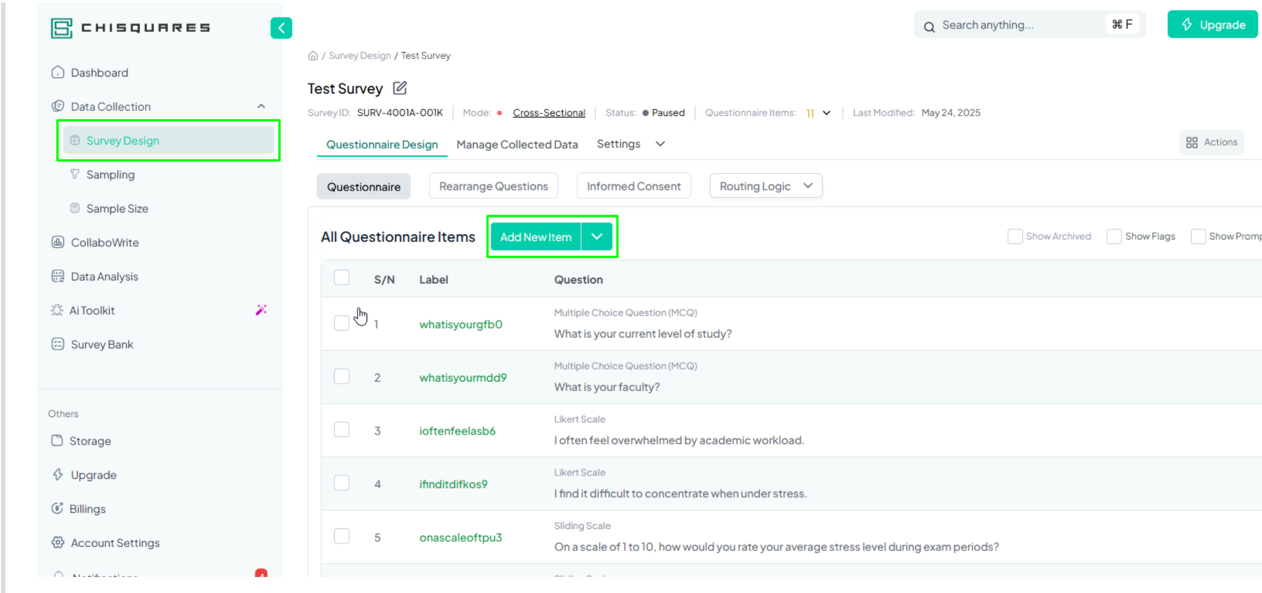
Introduction

The **"Add New Item"** feature in the **Chisquares** platform is an essential tool for building robust and flexible surveys. This functionality empowers users to seamlessly incorporate various types of survey elements such as questions, scripts, instructions, and informational texts. Designed to support a wide array of data collection strategies, it offers both manual and bulk addition options, thereby streamlining the survey creation process.

Accessing the "Add New Item" Feature

Step 1: Access the Survey

- From the dashboard or the **Survey Design Module**
- Open the survey project in which you wish to add a new item.

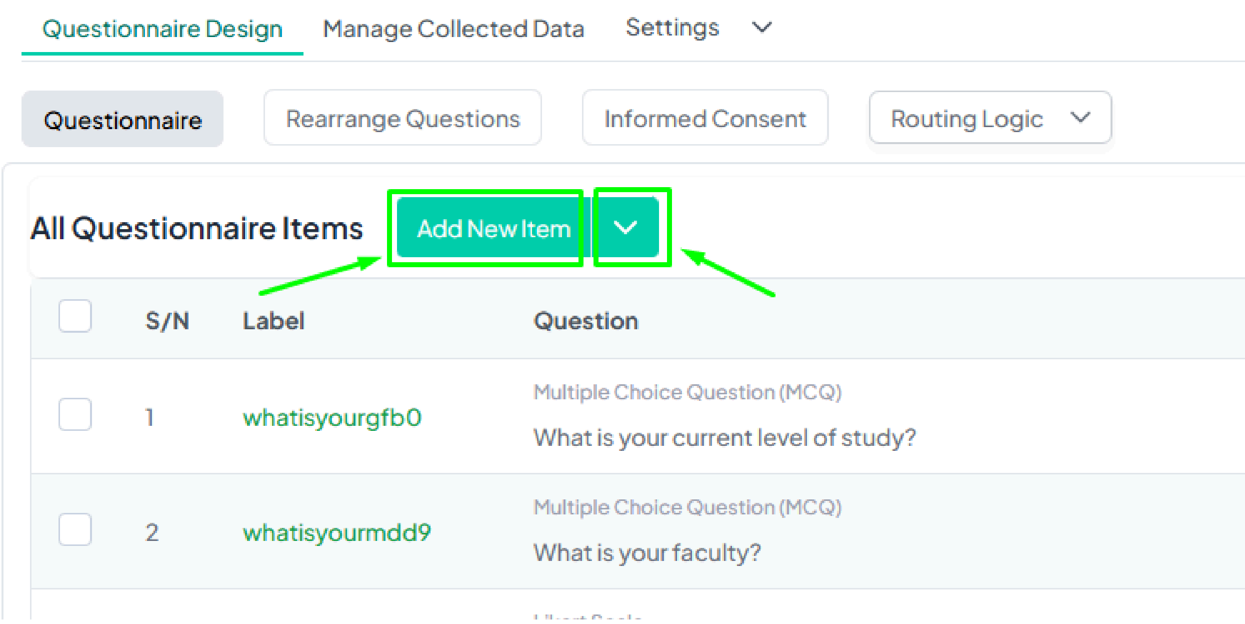


Step 2: Locate and Click the "Add New Item" Button

- The button is prominently positioned within the toolbar at the top of the design workspace.

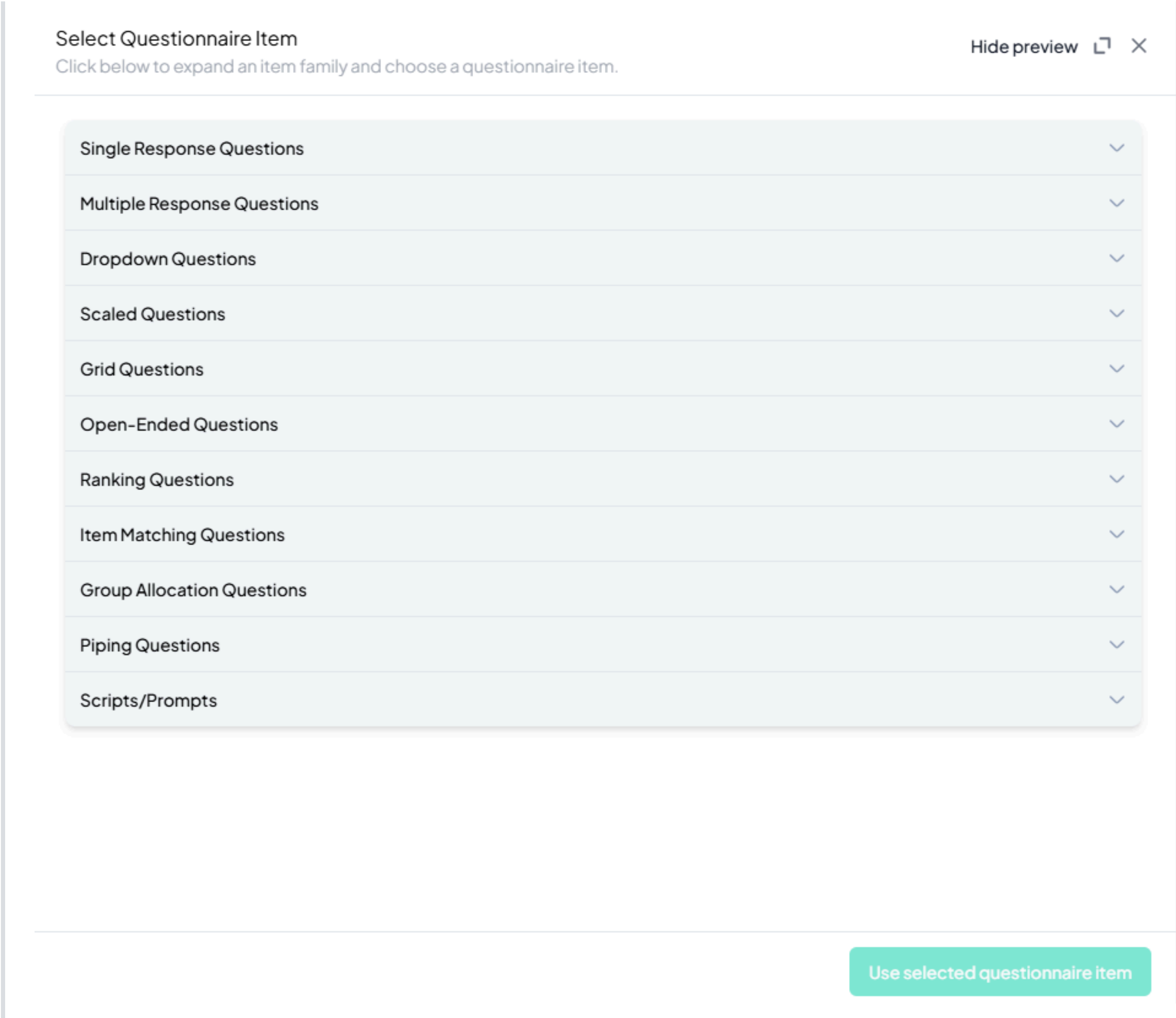
Understanding the "Add New Item" Button Structure

The **"Add New Item"** button is a **composite control** consisting of two functional parts:



1. Primary Button: Manual Item Addition

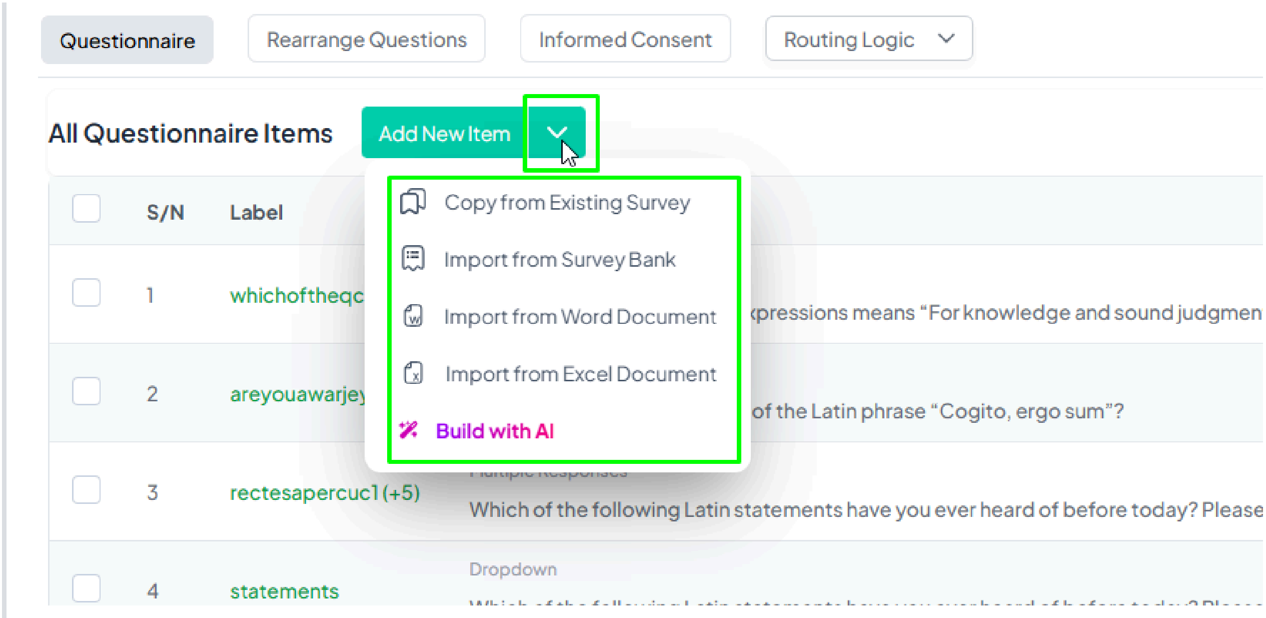
- **Label:** "Add New Item"
- **Function:** Opens the question type panel.



- **Usage:**
  - Click to view available question types.
  - Select a question type that suits your needs.
  - Enter a question stem and response options.
  - Click **"Push to Questionnaire"** to add the item.

2. Dropdown Button: Bulk Item Addition

- **Indicator:** Inverted caret (▼) at the right end of the button.
- **Function:** Displays a dropdown menu with bulk import options.



- **Options Include:**

Option	Description
Copy from Existing Survey	Copy questions from a previously created survey.
Import from Survey Bank	Import validated questions from the Chisquares Survey Bank.
Import from Word Document	Import questions formatted in a Word document.
Import from Excel Document	Import questions formatted in an Excel spreadsheet.
Build with AI	Use the integrated AI builder to generate questions based on prompts.

Conclusion

The **"Add New Item"** button within the Chisquares Survey Design Module is a versatile and user-friendly feature that significantly enhances survey customization. Whether you're designing a simple questionnaire or a complex data collection instrument, this tool equips you with the flexibility and efficiency needed for success.

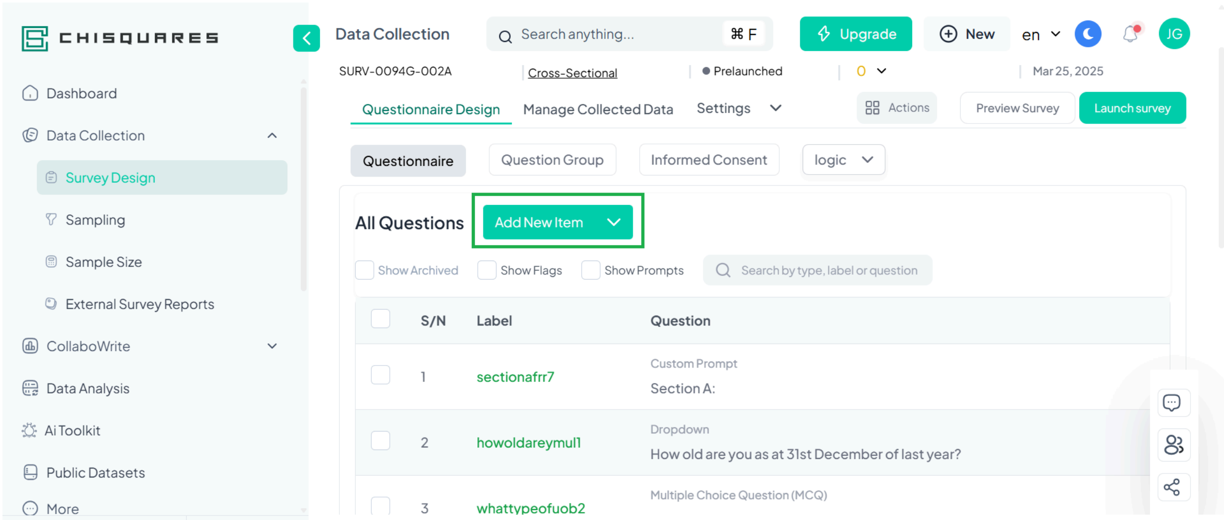
Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / Copy from Existing Survey

The Chisquares survey platform allows users to duplicate survey content from an existing survey into a new one. This feature simplifies survey creation by reusing predefined questions, consent forms, logic settings, and other components.

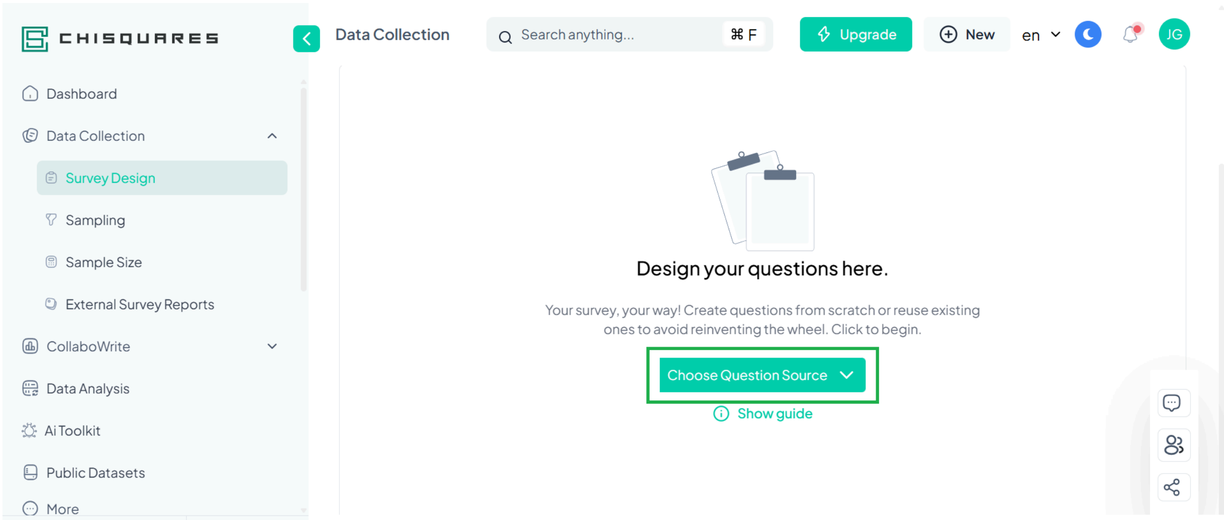
Steps to Copy from an Existing Survey

1. **Access Survey Design**

To add questions from an existing survey to a survey that already contains questions, navigate to the Survey Design section under Data Collection in the left-hand menu. Click on the dropdown list next to Add New Item, then select Copy from Existing Survey to import additional questions. This allows you to reuse a previously created survey and modify it as needed, ensuring consistency while saving time in survey design.

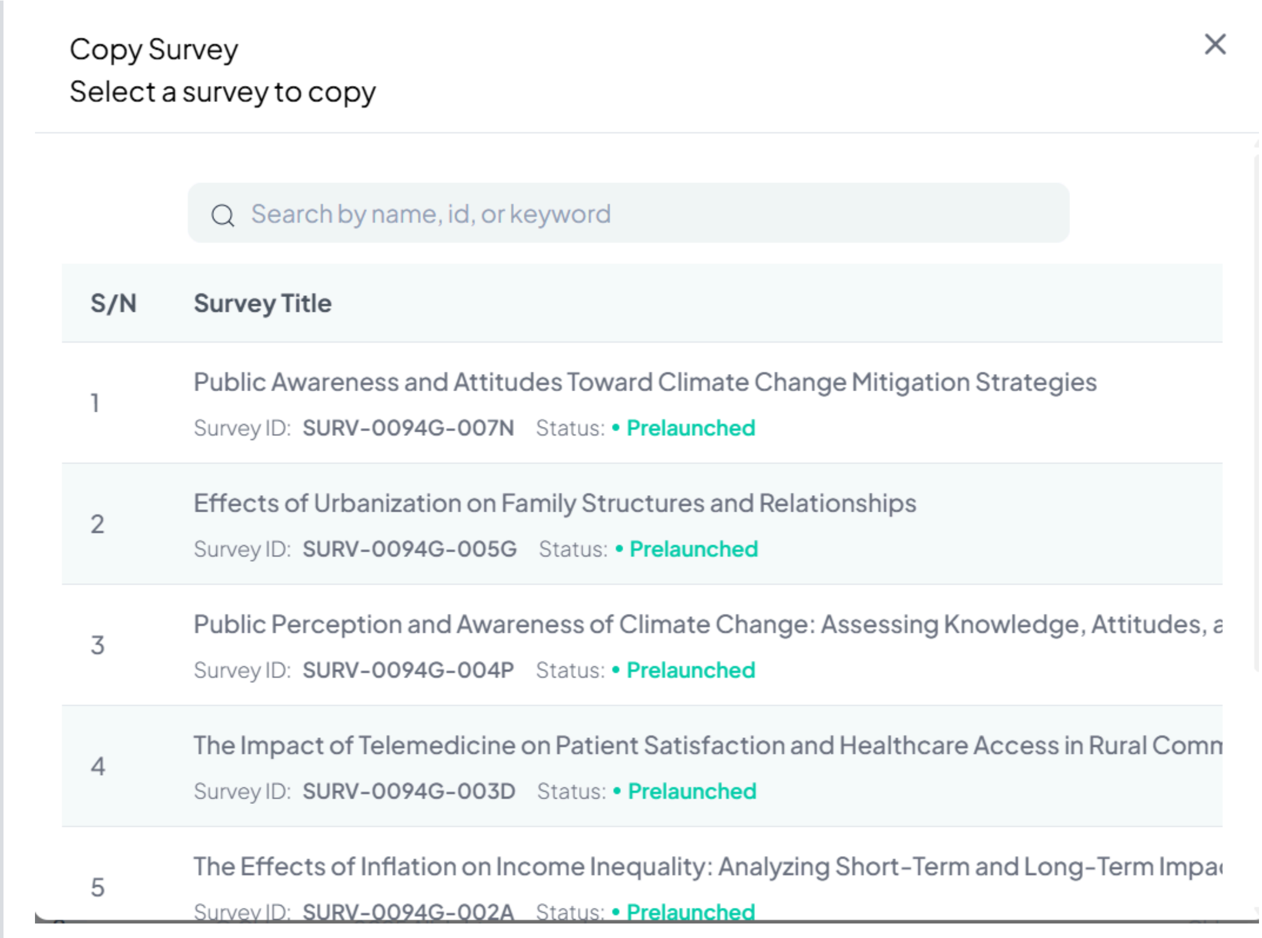


To copy survey components however from an existing survey into a new survey without any questions, select Choose Question Source and click on Copy from Existing Survey to import the necessary elements.



2. **Select a Survey to Copy**

A pop-up window will appear with a list of available surveys. Use the search bar to find a specific survey by name, ID, or keyword. Click on the survey you wish to duplicate.



3. **Choose Items to Copy**

After selecting a survey, a dialog box will display various components that can be copied, such as: Questions

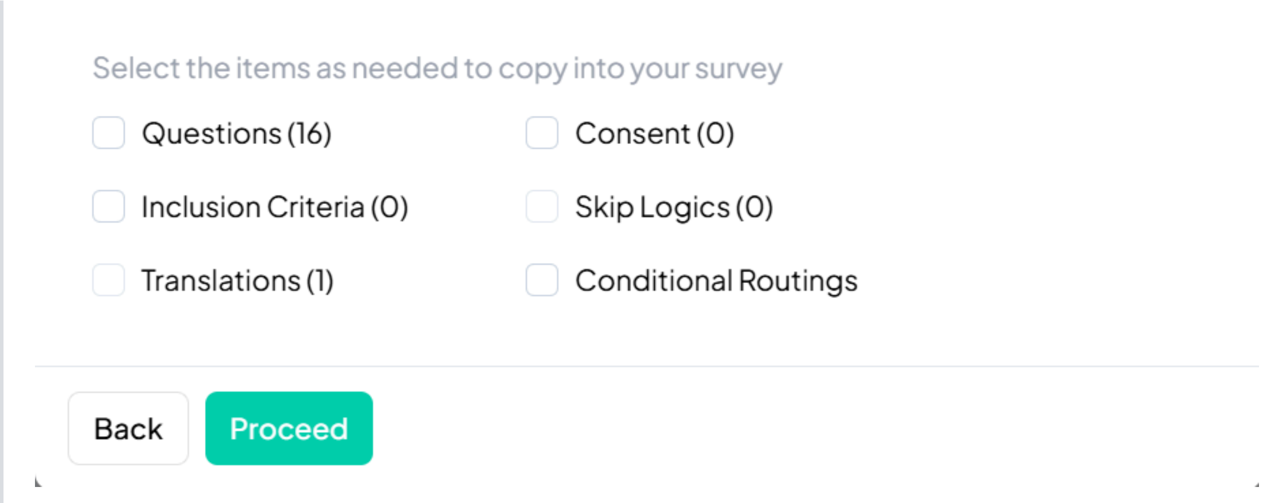
Consent Forms

Inclusion Criteria

Skip Logics

Conditional Routings

Translations



Check the boxes next to the items you want to include in your new survey.

4. **Confirm and Proceed**

Click Proceed to finalize the selection. The chosen elements will be imported into the current survey. This process helps users save time and maintain consistency across multiple surveys by leveraging previously designed templates.

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / Importing Questions from a Survey Bank

The Chisquares platform allows users to browse and import pre-existing survey questions directly into their own projects. This feature simplifies the survey design process by enabling the selection of categorized questions based on relevance, topic, or research focus.

How to Import Questions from the Survey Bank

You can easily import pre-existing questions into your survey using the Survey Bank feature. Follow these simple steps:

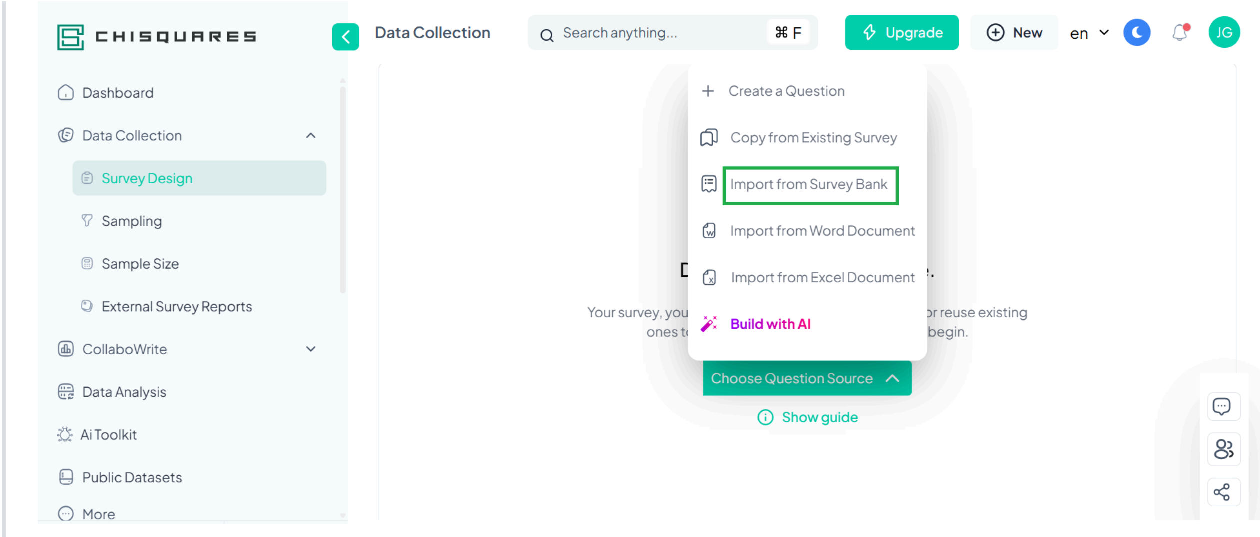
Step 1: Navigate to Survey Design

- On the left-side menu, go to Data Collection and select Survey Design.

Step 2: Choose Your Question Source

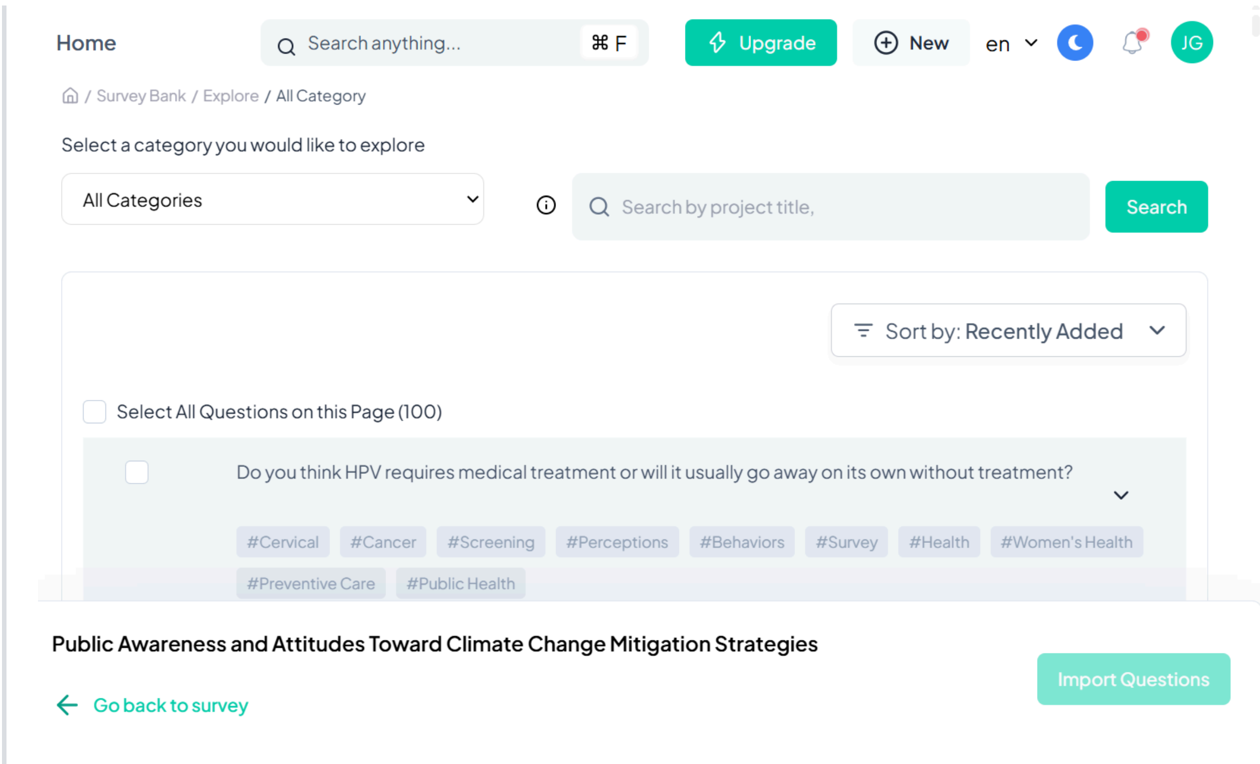
- Click the “+ New” or “Choose Question Source” button.

- From the dropdown menu, select Import from Survey Bank



Step 3: Browse and Select Questions

- You'll be redirected to the Survey Bank interface.
- Use the category filter or search bar to explore relevant questions.



- Check the boxes next to the questions you want to include.

You can also select “Select All Questions on this Page” if needed.

Step 4: Import to Your Survey

- Once selected, click the Import Questions button at the bottom right.
- The questions will now be added to your current survey project.

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / How to Import Survey Questions from a Word Document

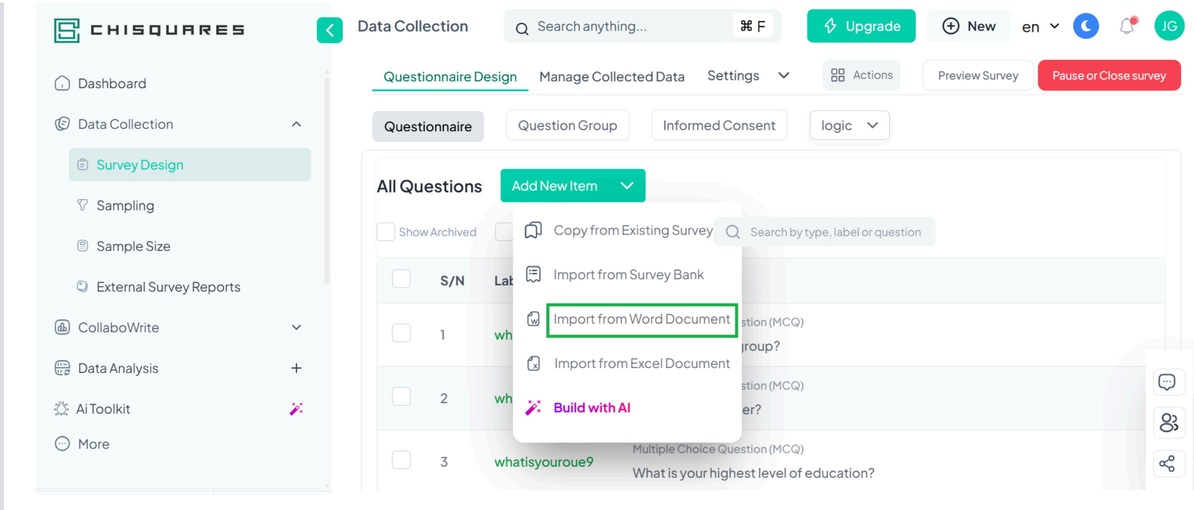
The Chisquares platform allows users to easily upload pre-written questionnaires from Microsoft Word documents directly into their survey project. Follow these simple steps:

1. **Navigate to Survey Design**

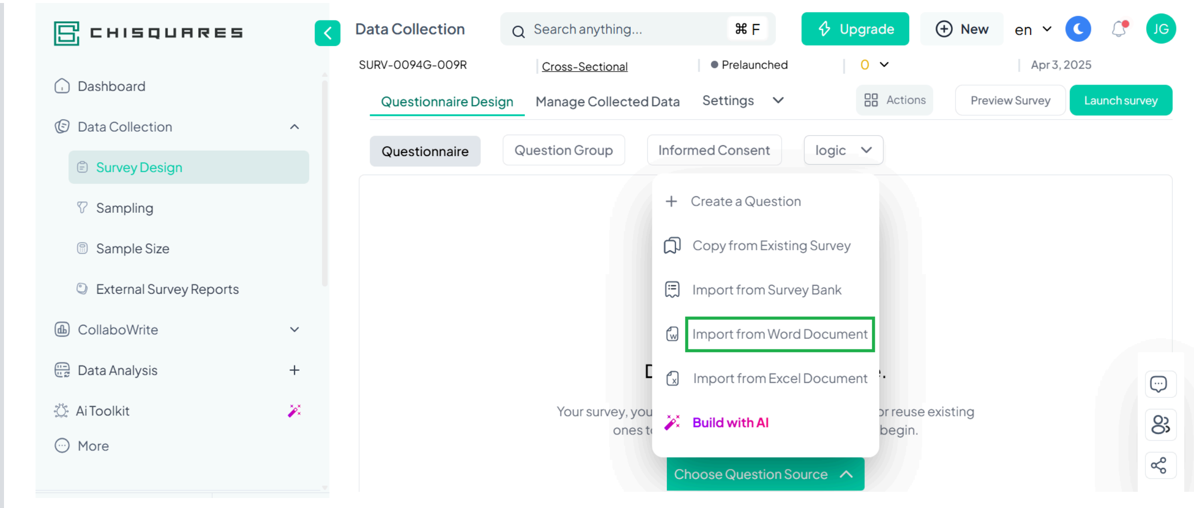
   From the sidebar, click on Data Collection, then select Survey Design.

2. **. Choose ‘Import from Word Document’**

   To import additional questions from a Word document into an existing survey, click the dropdown arrow next to “Add New Item.”

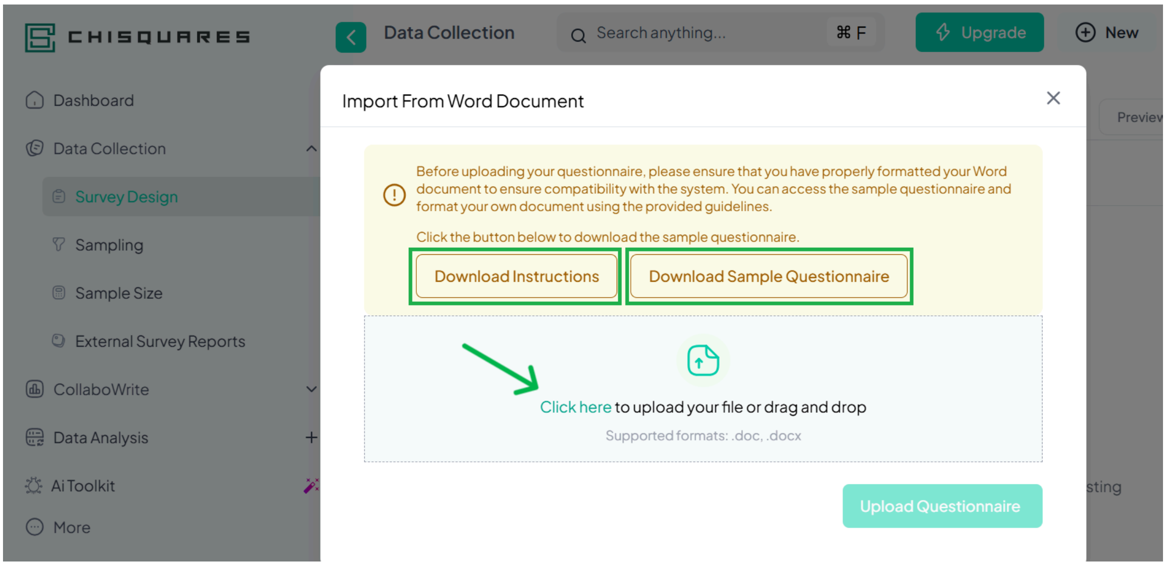


If you are working on a new survey, click “Choose Question Source” and select “Import from Word Document” from the dropdown menu.



3. **Prepare Your Document**

   - A pop-up will appear prompting you to download formatting instructions and a sample questionnaire:



- Click “Download Instructions” to see how to format your Word document properly.
- Click “Download Sample Questionnaire” to use a template that works seamlessly with the system.

4. **Upload Your Word Document**
   - Once your document is properly formatted (.doc or .docx), click the upload area indicated by the arrow above, or simply drag and drop your file.
   - After uploading, click the “Upload Questionnaire” button to complete the process.

Tips for a Successful Import

Follow the formatting instructions exactly. Double-check that the structure matches the sample template.

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / Importing Survey Questions from an Excel File

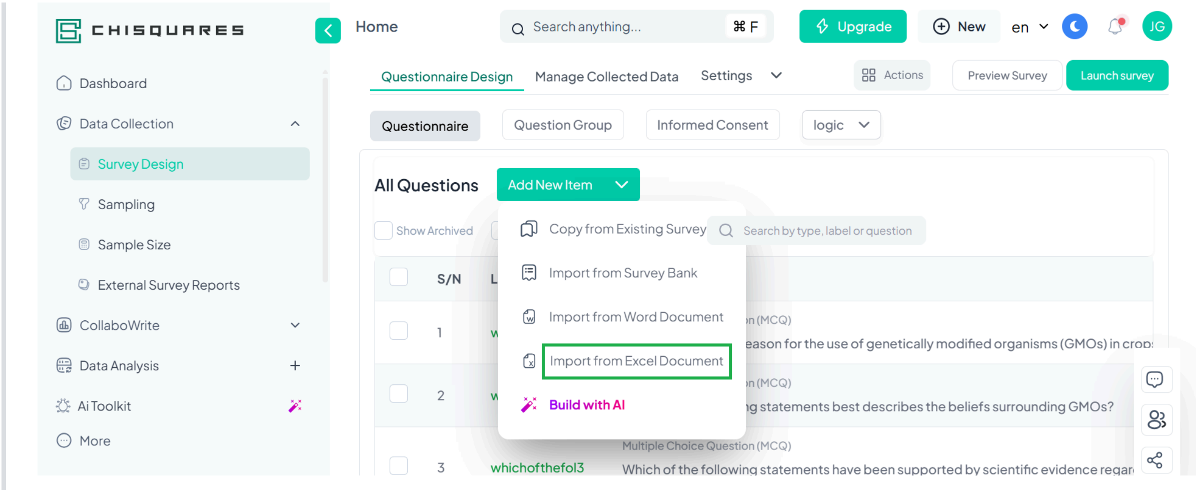
The Chisquares platform enables users to seamlessly upload pre-formatted survey questions from Microsoft Excel spreadsheets into their survey projects This feature simplifies survey creation by enabling the direct import of externally developed content into the platform.

Steps to Import from Excel

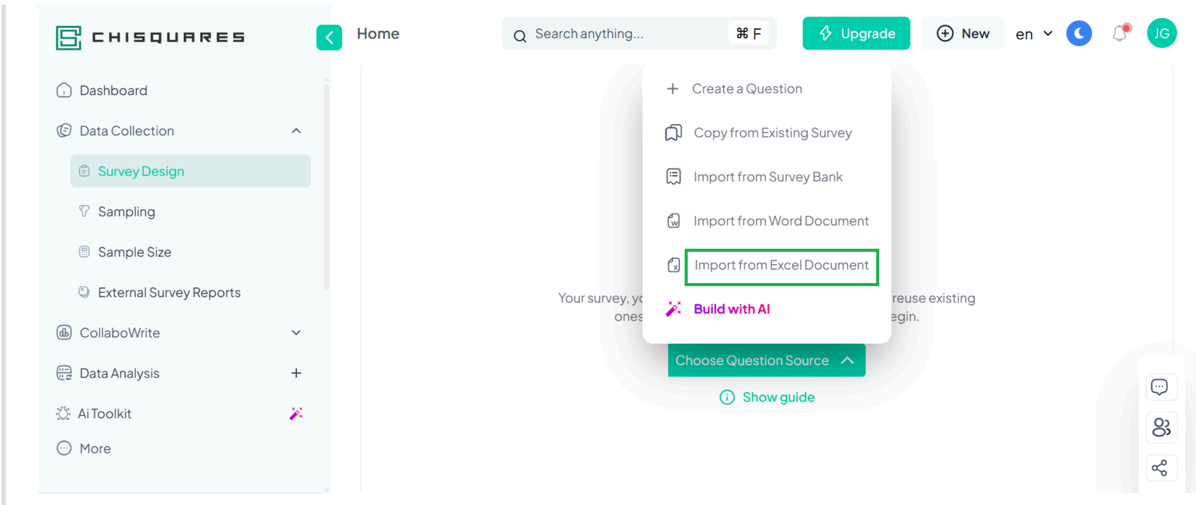
1. Access Survey Design

   Navigate to the left-hand menu. Click on Data Collection, then select Survey Design.

2. Select the Import Option For surveys that already contain questions, click the dropdown arrow next to Add New Item and select Import from Excel document.

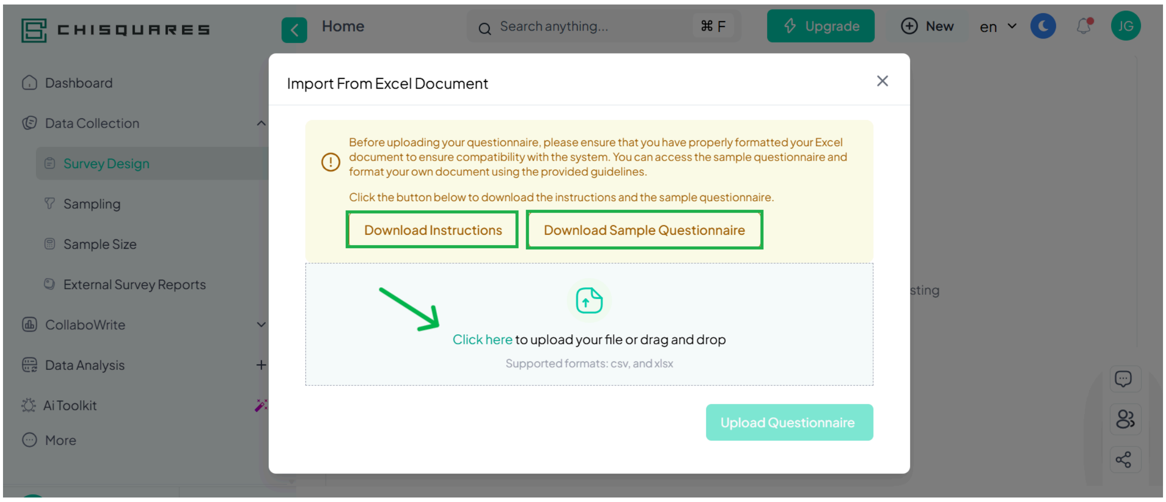


For new surveys, click Choose Question Source and select Import from Excel document from the dropdown list.



3. Prepare Your Excel File

A dialog box will appear, providing access to formatting resources. Click Download Instructions to view detailed formatting guidelines. Click Download Sample Questionnaire to obtain a template compatible with the system.



Ensure that your Excel file follows the specified format to avoid errors during import. Acceptable file types include *csv* and *xlsx*

4. Upload the Excel File Use the designated upload area or drag and drop your Excel file as shown in the interface.

   After uploading, click the Upload Questionnaire button to initiate the import process.

Best Practices for a Successful Import

Strictly adhere to the provided formatting instructions. Confirm that your Excel file structure matches the sample template.

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / Building Survey Questions with AI

The platform provides a powerful Build with AI feature that enables users to generate high-quality survey questions directly within the platform using artificial intelligence. This tool simplifies survey creation by leveraging AI to assist with content generation, reducing manual effort while ensuring consistency and clarity.

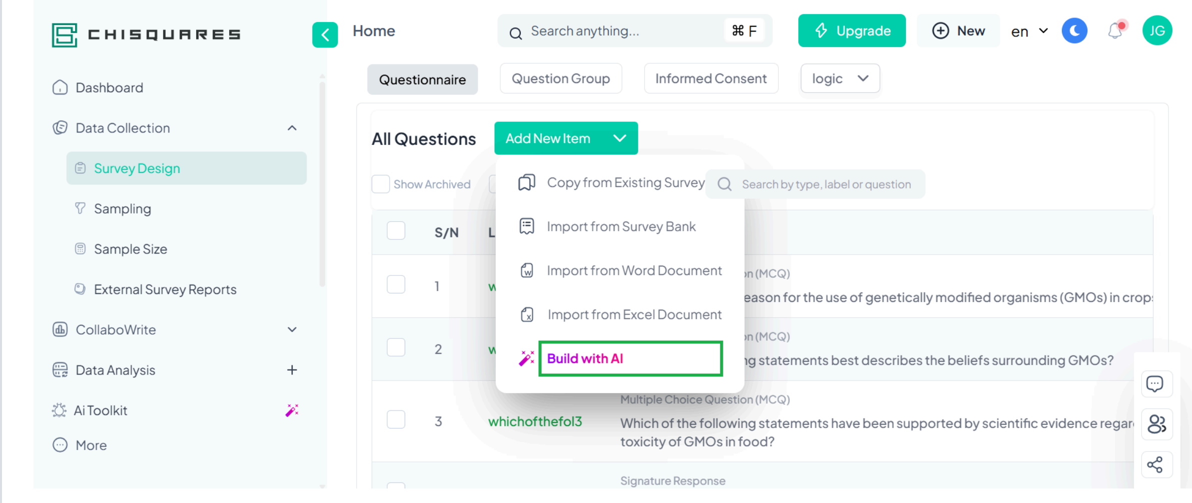
Steps to Build Survey Questions Using AI

1. **Access Survey Design**

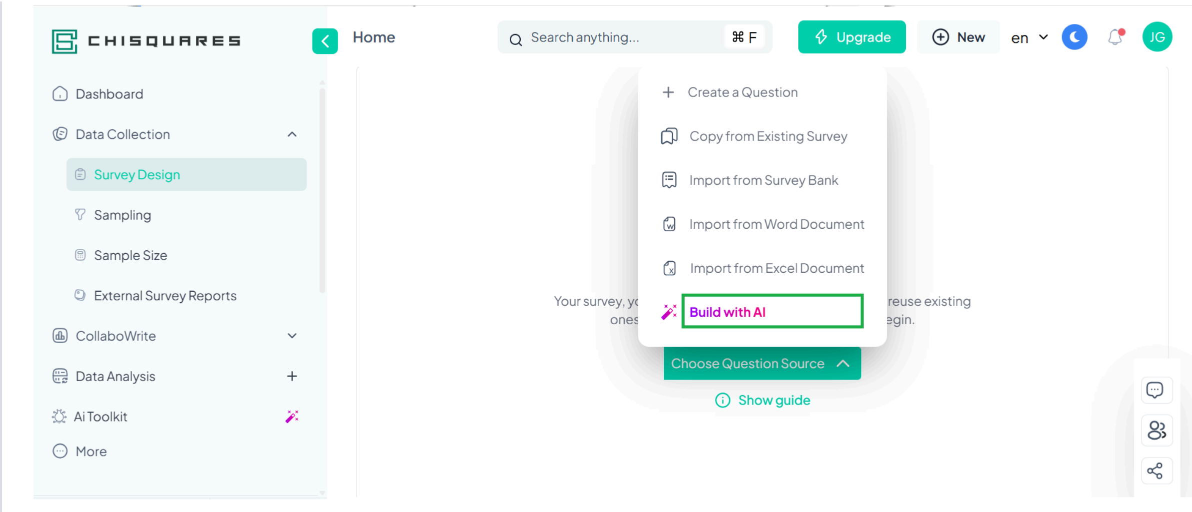
Navigate to the left-hand menu. Click on Data Collection, then select Survey Design.

2. **Select the 'Build with AI' Option**

For surveys that already contain questions, click the dropdown arrow next to Add New Item and select Build with AI.

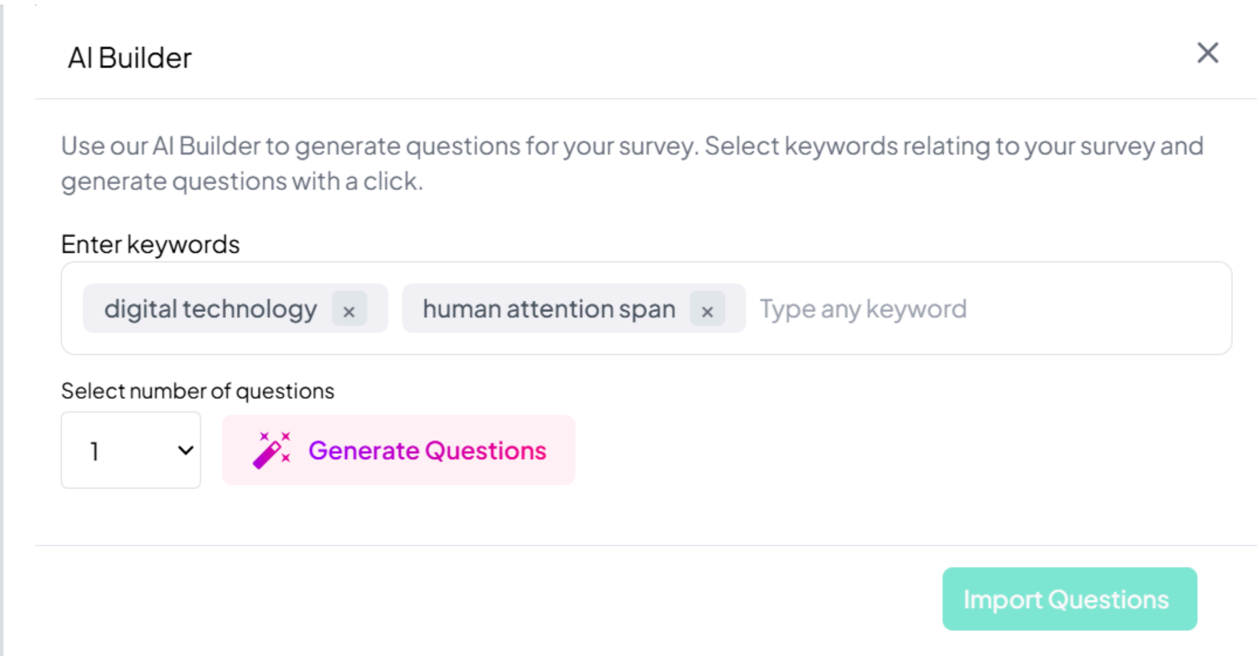


For new surveys, click Choose Question Source, then select Build with AI from the dropdown menu.



3. **Provide Input for AI Generation**

A dialog box will appear prompting you to enter key words or phrases for the survey.



Also include the number of questions you want to be generated by AI for your survey. To achieve optimal outcomes, consider using precise and well-defined keywords to help the AI generate accurate and relevant survey questions.

4. **Generate and Review Questions**

Click Generate Questions to allow the AI to produce a set of suggested questions. import and review your preferred question(s), and make any necessary edits. To generate a new set of suggestions, simply click the Generate Questions button again.

Best Practices for Using AI to Build Surveys

Clearly define your topic or objective to help the AI generate accurate content. Review and adjust AI-generated questions Combine AI assistance with your expertise to ensure quality and alignment with your audience.

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / MULTIPLE CHOICE QUESTION (MCQ)

Introduction

The Multiple Choice Question (MCQ) is a highly effective tool for collecting structured, single-response data. With Chisquares, users can easily create and customize MCQs to suit a variety of data collection needs. This guide covers how to configure standard MCQs, apply response limits and conditional logic, enable dynamic option filtering, and use images as selectable answers, empowering users to design interactive, flexible, and visually engaging surveys.

Features of MCQ in Chisquares

- **Question Text Input:** Create and format the core question prompt.
- **Response Options:** Define selectable answers manually or dynamically.
- **Required Toggle:** Make the question mandatory to proceed.
- **“Other” Option:** Enable an open-text response field.
- **Media Attachments:** Support for audio, image, or video file uploads.

- **Response Shuffling:** Rotate or fix option orders to reduce bias.
- **Response Limits:** Hide options after a predefined number of selections.
- **Image-Based Options:** Replace text with visual answers and captions.
- **Dynamic Sourcing:** Import options from files or previous questions.

Use Cases

Multiple Choice Questions (MCQs) are highly versatile and commonly used across a wide range of data collection scenarios. Typical use cases include:

- **Demographics**: Ideal for segmenting respondents based on identity characteristics.
  Example: "What is your marital status?"
  Options: Single, Married, Divorced, Widowed

- **Preferences**: Useful for understanding user habits or product inclinations.
  Example: "Which platform do you use the most?"
  Options: Facebook, Instagram, LinkedIn, TikTok

- **Screening**: Effective for qualifying or filtering participants for further questioning.
  Example: "What age range do you fall under?"
  Options: Under 18, 18–24, 25–34, 35–44, 45+

When to Use Multiple Choice questions

Use a Multiple Choice question when:

- You need a **single, definitive response** from a list of possible answers.
- The answer options are **mutually exclusive** and logically cannot overlap.
- You are collecting **structured, categorized data** that can be easily analyzed and visualized.

- You want to streamline the respondent experience with **clear, pre-defined choices**.

This question type is particularly effective when your goal is to classify or compare responses in a standardized format.

Scenario-Based Example
In a **public transportation survey**, you might ask:

> *"Which of the following modes of transportation do you use most frequently to commute to work?"*
> **Options:** Car, Bus, Train, Bicycle, Walk, Rideshare (Uber, Lyft, etc.)
>
> This helps segment respondents by their dominant commuting behavior and informs city infrastructure planning.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Label the Question

- Add a label to help identify the question within your survey. Alternatively, you can use AI to get suggestions for the label.

3. Add Answer Options

- Manually input up to 2 default options and add more by clicking More.
- Choose from User Supplied, System Supplied, or Import Options (CSV/JSON/Excel).

4. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

5. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Advanced Features

1. Response Limit per Option
Enable hiding of options after a specified number of responses (e.g., only allow 10 users to select Option A).

2. Response Shuffling

- Choose among:
    - Keep all responses fixed
    - Shuffle all responses
    - Fix some, shuffle others

3. Option Filtering

- Show specific options to specific respondent segments based on earlier answers.

4. Use Image as Options

- Replace text answers with image selections, complete with caption support.

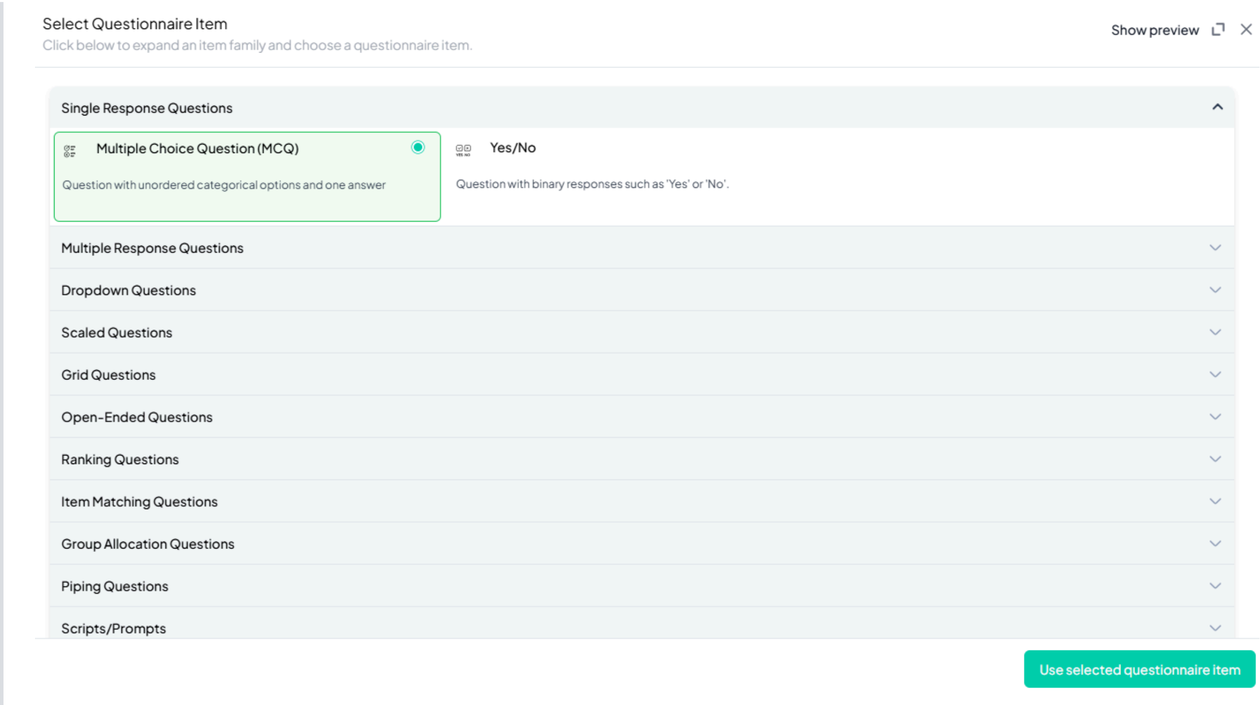
Step-by-Step Guide

Step 1: Create a New Question
To begin creating an MCQ:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

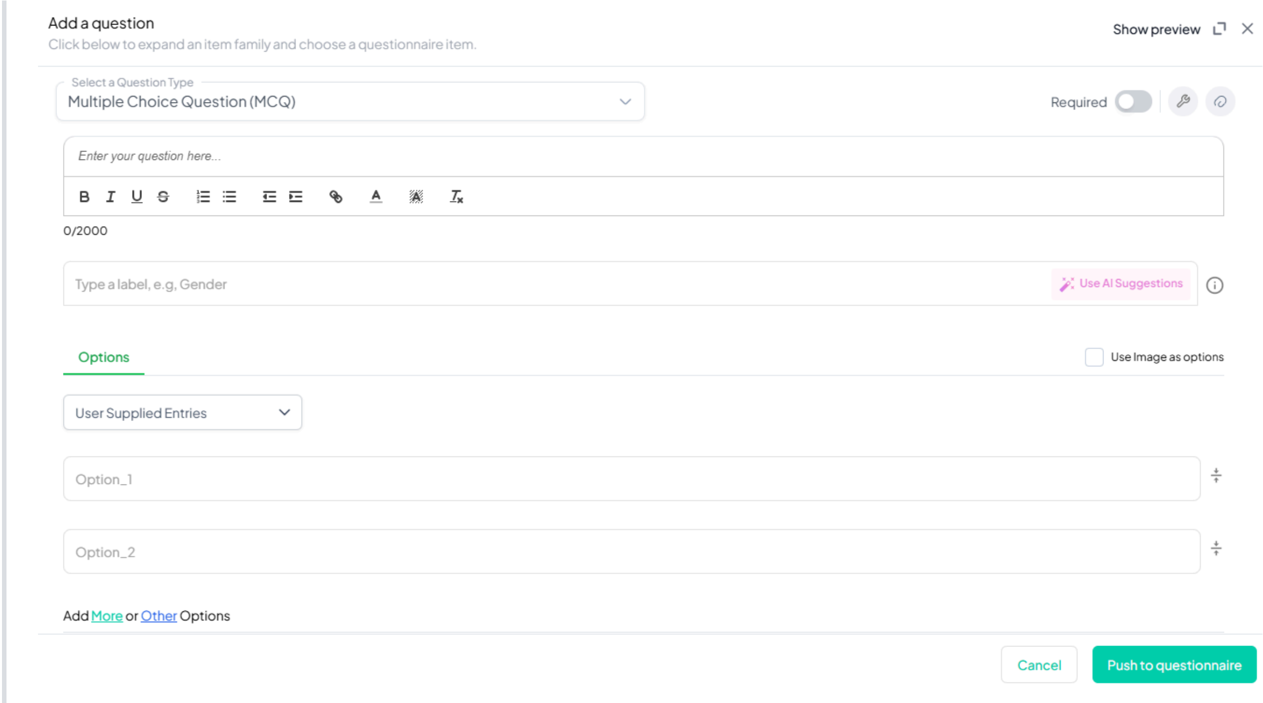
Step 2: Select the Question Type

1. In the question type section, select **Single Response Questions.**
2. Choose **Multiple Choice Questions** from the list of available question types.
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the MCQ type, you will be prompted to add your question. Enter your question in the provided text box. Example: *Which of the following Latin expressions means "For knowledge and sound judgment"?*
2. Apply formatting using the toolbar.
3. You must also add a label to help identify the question within your survey.



Step 4: Define the Response Options

1. Enter the options from which respondents can choose. Each option should represent one unique answer to your question. Example:
    - Recte Sapere Fons
    - Gradatim Ferociter
    - Veni, vidi, vici
    - E pluribus unum
    - Carpe diem
2. If you want to add additional response options, click **More Options** and type the new responses.
3. Also, the user can explore system options for responses they do not want to type manually. This is especially useful for very exhaustive options like countries of the world, but the platform contains an extensive array of

options you can simply use without having to type options manually (use system-supplied or dynamic entries if needed).

Step 5: Make the Question Required (Optional)
If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)
You can upload media (images, videos, or audio files) to accompany the question. Here’s how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, “View the media below, then answer the following question.”

Step 7: Set Response Limits (Optional)
If you want to limit the number of responses for a particular option, follow these steps:

1. Click the response limit icon (next to Required toggle).
2. Enable **Hide specific options after X responses**.
3. Enter a response cap for each option(e.g., 50). Once this limit is reached, the option will no longer be displayed to participants.

Step 8: Use Option Filtering (Optional)
Option filtering allows you to conditionally display a subset of response options to certain groups of respondents based on their answers to previous questions.

1. Click the **Option Filtering** button.
2. Select the question(s) you want to use to define the subset of respondents.

3. Choose the conditions for filtering (e.g., participants aged 18-30).
4. Select the options that should be shown to this subset of respondents.
5. Respondents who meet the condition will only see the filtered options. All others will see the full list of options.

Step 9: Use Images as Options (Optional)

1. If you prefer to use images as response options instead of text, check the **Use Images as Options** box.
2. Upload images for each option and add captions as necessary.

Rotation Options

Chisquares offers several rotation options for MCQs to minimize bias in responses. You can manage these settings from the question setup page:

1. **Keep All Responses Fixed:** All participants will see the options in the same order.
2. **Rotate All Responses:** The order of options is randomized for each participant.
3. **Fix Some, Rotate Others:** Select a few options to remain fixed in their order, while the others rotate.

How to Set Rotation

1. Click on the **Rotation Options.**
2. Choose the desired rotation behavior.
3. Save your settings.

Preview Mode

Before finalizing the MCQ question, it's important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your MCQ setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

Question:

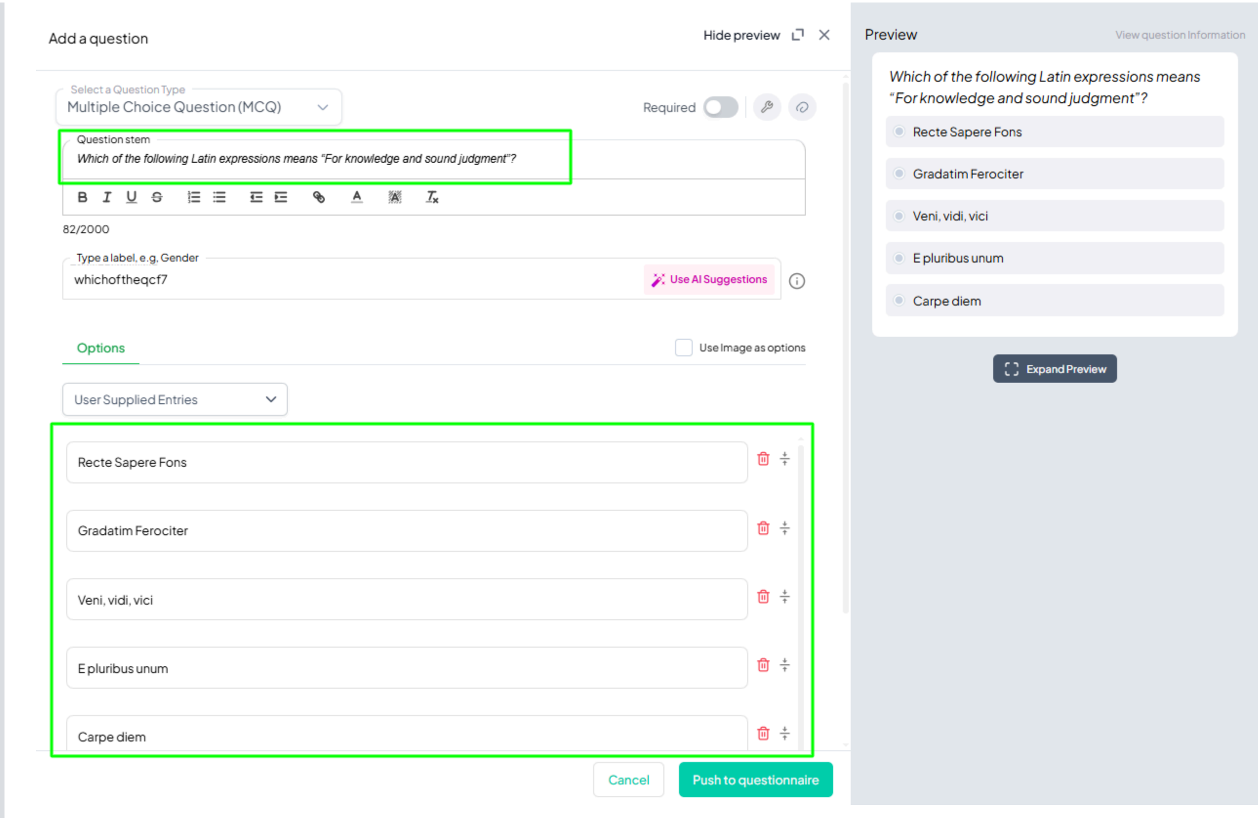
> *Which of the following Latin expressions means "For knowledge and sound judgment"?*
> **Response Options:**
>
> - Recte Sapere Fons
> - Gradatim Ferociter
> - Veni, vidi, vici
> - E pluribus unum
> - Carpe diem

Additional Settings:

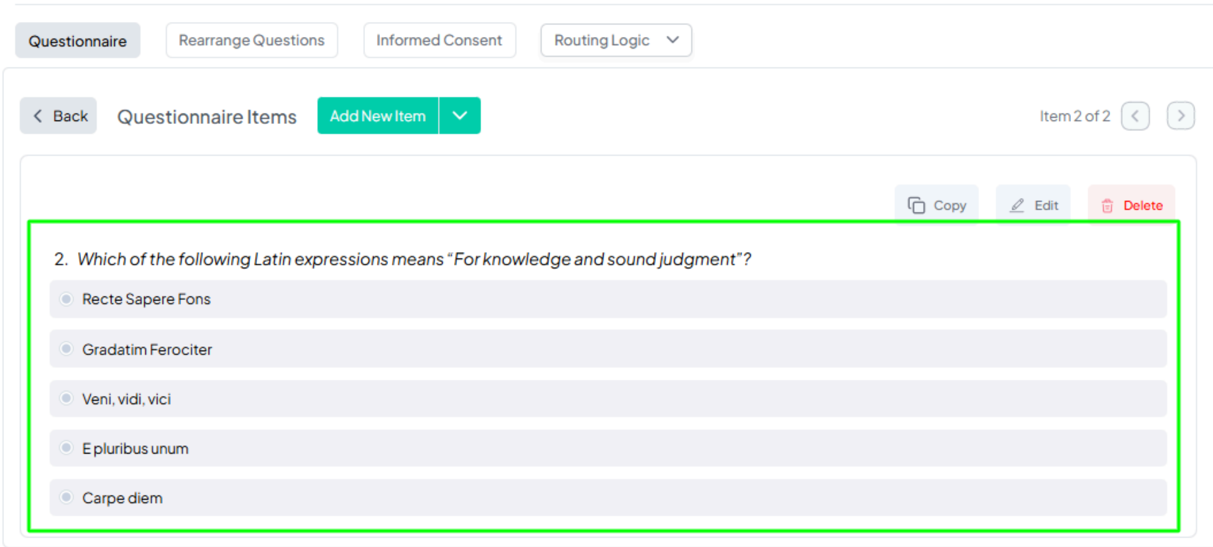
- **Required:** No
- **Response Limit:** 50 for *"Recte Sapere Fons"*

- **Option Filtering:** Show *"Recte Sapere Fons"* only to respondents who answered "Yes" to the question *Have you ever studied Latin?*
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

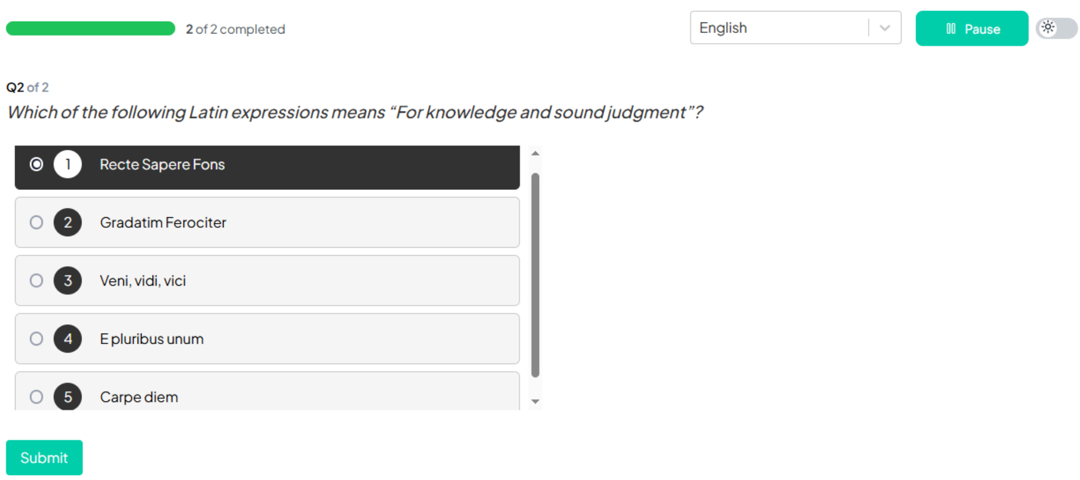
Multiple Choice Question Added



Multiple Choice Question Pushed Preview



Multiple Choice Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares elevates the standard MCQ experience by offering advanced customization and automation features designed for both simplicity and depth. Key platform-specific advantages include:

- **Support for image-based MCQs**: Present visual options to enhance engagement and clarity.
- **Upload/import option lists**: Quickly scale surveys by importing predefined choices in bulk.
- **Dynamic linking to other questions**: Build intelligent, adaptive flows where subsequent questions respond to earlier answers.
- **Built-in AI assistance**: Automatically generate plausible answer options based on your question prompt, reducing manual input and improving consistency.

These capabilities allow you to build not just functional MCQs, but **interactive and insight-rich data collection experiences**.

Conclusion

The Multiple Choice Question (MCQ) feature on Chisquares is an essential tool for gathering clear, structured responses from survey participants. Whether you are conducting an educational assessment, market research, or any other type of survey, Chisquares offers a variety of powerful features like response limits, option filtering, and image-based responses to enhance the survey experience for both respondents and researchers.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / Yes or No

Introduction

The Yes/No question type on the Chisquares platform is a simple yet powerful tool for collecting binary responses from survey participants. This question type is designed for scenarios requiring a clear "Yes" or "No" answer but also allows for additional options to accommodate uncertainty (e.g., "Not Sure").
With Chisquares, setting up Yes/No questions is seamless, enabling researchers to gather precise and structured responses while maintaining flexibility in response options. This guide will walk you through the process of setting up Yes/No questions, detailing both basic and advanced features to help you customize the question to fit your research needs.

Features of Yes/No Chisquares

- **Question Text Input:** Create and format the core question prompt.
- **Binary Response Options:** Standard response choices include "Yes" and "No."
- **Required Toggle:** Make the question mandatory to proceed.

- **"Other" Option:** Enable an open-text response field.
- **Media Attachments:** Support for audio, image, or video file uploads.
- **Custom Labels:** Helps in data analysis and reporting.

Use Cases

The **Yes/No** question type is ideal for scenarios where a clear, binary decision is needed. It simplifies the response process for participants while enabling researchers to capture precise, easily interpretable data. Common use cases include:

- **Awareness Checks**: Determine whether respondents are familiar with a concept, product, or term.
  Example: "Are you aware of the meaning of the Latin phrase 'Cogito, ergo sum'?"

- **Eligibility Screening**: Quickly confirm if a participant meets certain criteria.
  Example: "Are you over 18 years of age?"

- **Opinion Validation**: Gather basic agreement or disagreement data.
  Example: "Do you believe this initiative will be successful?"

- **Follow-Up Logic Triggers**: Use Yes/No responses to conditionally branch to more detailed questions.
  Example: "Have you purchased this product before?" If Yes → Follow-up.

When to Use Yes/No Questions

Use a Yes/No question when:

- The response must be **binary or decisively categorized**.

- You’re aiming to keep the question **simple, clear, and fast to answer**.
- The question serves as a **filter or gateway** for further questioning.
- The data needs to be **easily analyzed and aggregated** in a structured form.
- You want to reduce ambiguity and limit free-form interpretation.

Yes/No questions are best suited for quick validations, eligibility checks, and survey logic control without overwhelming participants with multiple options.

Scenario-Based Example In a **health screening questionnaire**, you might ask:

> *"Have you smoked at least one cigarette in the past 30 days?"*
> **Options:** Yes, No

This binary question allows researchers to quickly identify current smokers for further segmentation or follow-up.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Label the Question (Optional)

- Add a label to help identify the question within your survey. Alternatively, you can use AI to suggestion suggestions for the label.

3. Add Answer Options

- **Default Response Options:** "Yes" and "No."

4. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

5. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Step-by-Step Guide

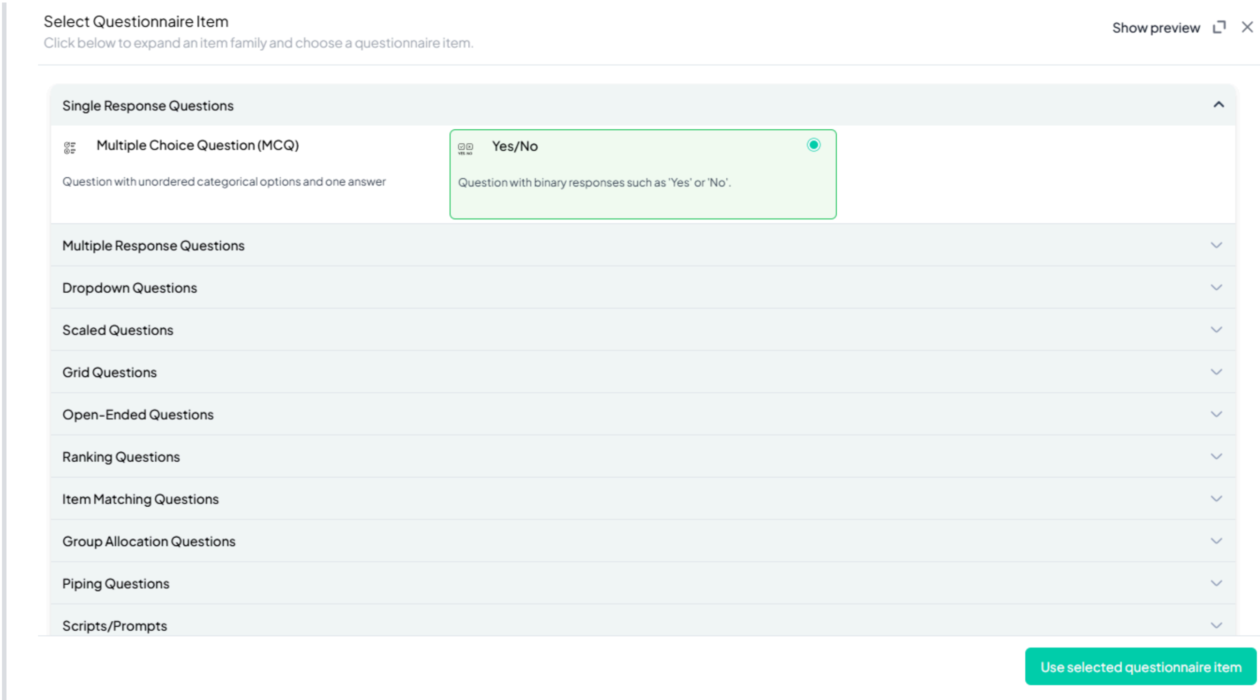
Step 1: Create a New Question

To begin creating a Yes/No question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design section.**
3. Click on the **Create a New Question** button.

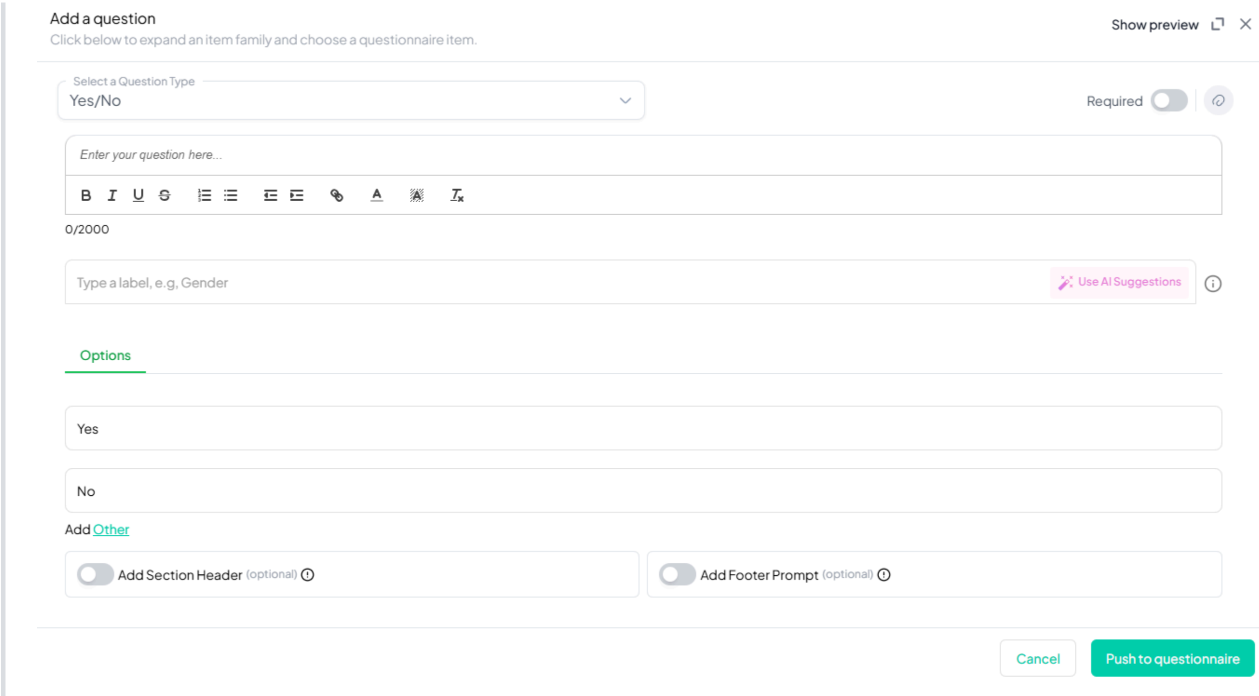
Step 2: Select the Question Type

1. In the question type section, select **Single Response Questions.**
2. Choose **Yes/No** from the list of available question types.
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the Yes/No type, you will be prompted to add your question. Enter your question in the provided text box.
   Example: Are you aware of the meaning of the Latin phrase "Cogito, ergo sum"?
2. You must also add a label to help identify the question within your survey.



Step 4: Define the Response Options

1. The default response options “Yes” and “No” will appear automatically.
2. Additionally, you can use the **“Other”** Option to enable an open-text response field.

Step 5: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here’s how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, “View the media below, then answer the

following question."

Preview Mode

Before finalizing the Yes/No question setup, it is important to preview how it will appear to participants.

1. Click on **Show Preview** at the top-right of the panel to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Yes/No setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

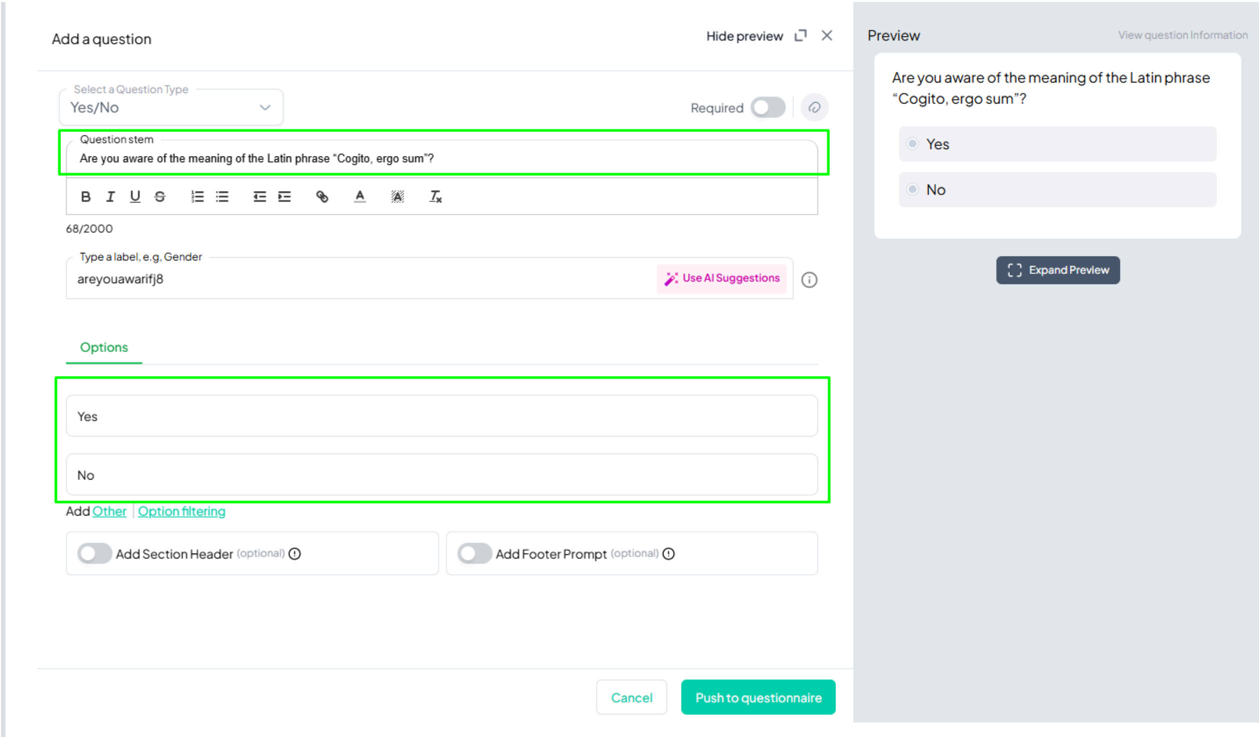
> **Question:**
> *Are you aware of the meaning of the Latin phrase "Cogito, ergo sum"?*
> **Response Options:**
> • Yes
> • No

Additional Setting:

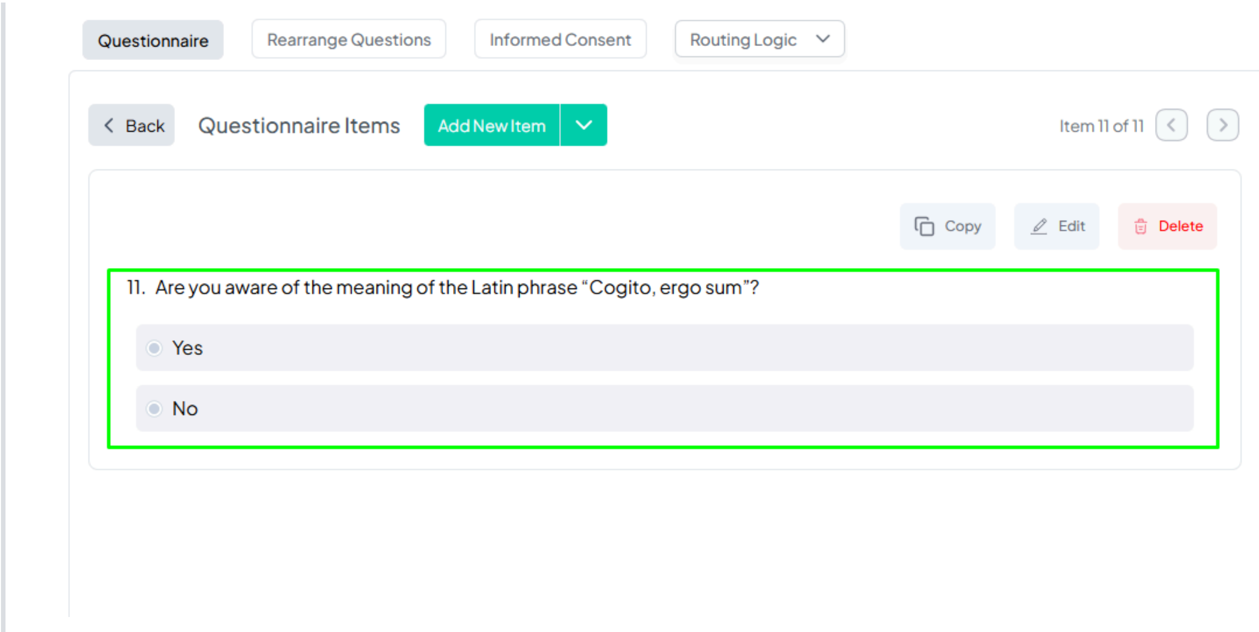
- **Required:** No
- **Add Media:** Upload a media to accompany the question

- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

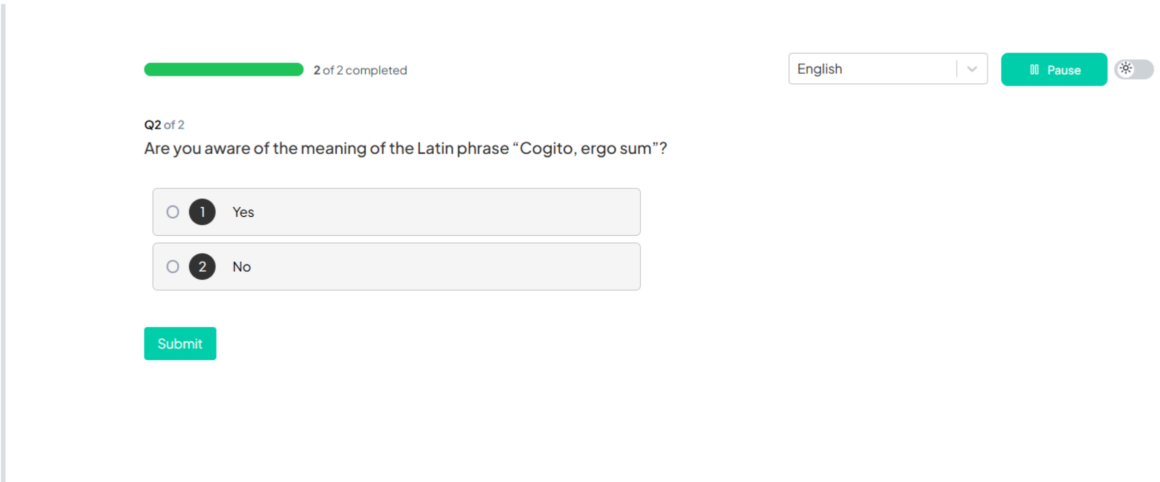
Yes or No Question Added



Yes or No Question Pushed Preview



Yes or No Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares enhances the utility of Yes/No questions with advanced features that make them more adaptable and insightful than traditional binary formats. Key advantages include:

- **Support for optional third responses**: Easily add alternatives like “Not Sure” or “Prefer not to say.”
- **“Other” open-text option**: Allow respondents to elaborate when binary choices aren’t sufficient.
- **Customizable labels**: Tailor response text to match tone, context, or branding.
- **Media attachments**: Add images, audio, or video to visually or contextually support the question.
- **AI-assisted label suggestions**: Generate meaningful metadata and tracking references.
- **Preview and test modes**: Ensure a polished respondent experience before going live.
- **Seamless integration into dynamic workflows**: Use Yes/No responses to trigger conditional paths and follow-up questions.

These capabilities turn a simple Yes/No format into a **strategic interaction tool** for both linear and branched surveys.

Conclusion

The Yes/No question type in Chisquares provides a simple yet flexible method for collecting clear, structured responses. Whether for research, evaluation, or assessments, this question type ensures efficient data collection while allowing for additional options to accommodate uncertainty. By leveraging features like response limits, conditional display, and media attachments, you can optimize the survey experience for respondents and enhance the quality of collected data.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / MULTIPLE RESPONSES

Introduction

The Multiple Response Question is a versatile feature on the Chisquares platform, designed to collect rich, multi-dimensional data. This question type allows respondents to select more than one answer from a predefined list, making it ideal for scenarios where multiple selections are valid, such as preference surveys, behavioral studies, or feedback forms.
This documentation provides a comprehensive guide to setting up and utilizing Multiple Response Questions, including basic configurations and advanced functionalities that enhance survey customization.

Features of Multiple Response Question in Chisquares

- **Question Text Input:** Create and format the core question prompt.
- **Response Options:** Define selectable answers manually or dynamically.
- **Required Toggle:** Make the question mandatory to proceed.
- **“Other” Option:** Enable an open-text response field.

- **Exclusion Option:** Marks an option as mutually exclusive.
- **Media Attachments:** Support for audio, image, or video file uploads.
- **Set Individual Response Limits:** All that apply (default): Allows multiple selections.
- **Response Shuffling:** Rotate or fix option orders to reduce bias.
- **Response Limits:** Hide options after a predefined number of selections.
- **Image-Based Options:** Replace text with visual answers and captions.
- **Dynamic Sourcing:** Import options from files or previous questions.

Use Cases

The **Multiple Response Question** type is essential when a single answer isn't enough to capture the full reality of a participant's experience. Unlike single-response formats, this type allows respondents to choose all options that apply, resulting in richer and more accurate data. It is widely applicable across research, marketing, education, public health, and more.

- **Behavioral Tracking**: Understand how people act or engage across multiple channels or scenarios.
  Example: "Which of the following foods did you consume in the last 7 days?"
  Options: Fruits, Vegetables, Fast food, Sugary drinks, Whole grains, Dairy products, None of the above

- **Preference Mapping**: Capture layered choices such as favored products, services, or features.
  Example: "Which social media platforms do you use regularly?"

- **Feedback Collection**: Allow participants to reflect on multiple aspects of a service or experience.
  Example: "Which workshop skills did you find helpful?"

- **Knowledge or Awareness Checks**: Identify familiarity with multiple items or concepts.
  Example: “Which of the following Latin phrases have you heard before?”

- **Public Health & Education**: Track multi-touch interactions, usage patterns, or access points.
  Example: “What vaccines have you received this year?”

When to Use Multiple Response Questions

Use Multiple Response Questions when:

- You want to **measure behaviors or preferences** that often occur simultaneously.
  Example: Platforms used, foods consumed, tools accessed.

- You need to **capture a complete picture** of participant experiences or opinions.
  Example: Activities joined, symptoms experienced.

- The choices are **not mutually exclusive** and more than one answer is expected.
  Example: Devices owned, reasons for choosing a product.

- Forcing one answer would **oversimplify reality** or skew the results.
  Example: Sources of information—people often use multiple simultaneously.

Scenario-Based Example
A public health survey asks:

> *Where do you usually get information about your health? (Select all that apply)*

> Options: Television, Radio, Internet, Healthcare professionals, Family and friends, Newspapers and magazines, None of the above

This approach captures a complete and accurate picture of how people access health-related information, allowing for multi-channel analysis that would be impossible with a single-response format.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Label the Responses

- Add a label to each response option to help identify the responses in your survey. Aternatively, you can use AI get suggestion suggestions for the labels.

3. Add Answer Options

- Manually input up to 2 default options and add more by clicking More.
- Choose from User Supplied, System Supplied, or Import Options (CSV/JSON/Excel).

4. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

5. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Advanced Features

1. Response Limit per Option

Enable hiding of options after a specified number of responses (e.g., only allow 10 users to select Option A).

2. Response Shuffling

- Choose among:
  - Keep all responses fixed
  - Shuffle all responses
  - Fix some, shuffle others

3. Option Filtering

- Show specific options to specific respondent segments based on earlier answers.

4. Use Image as Options

- Replace text answers with image selections, complete with caption support.

Step-by-Step Guide

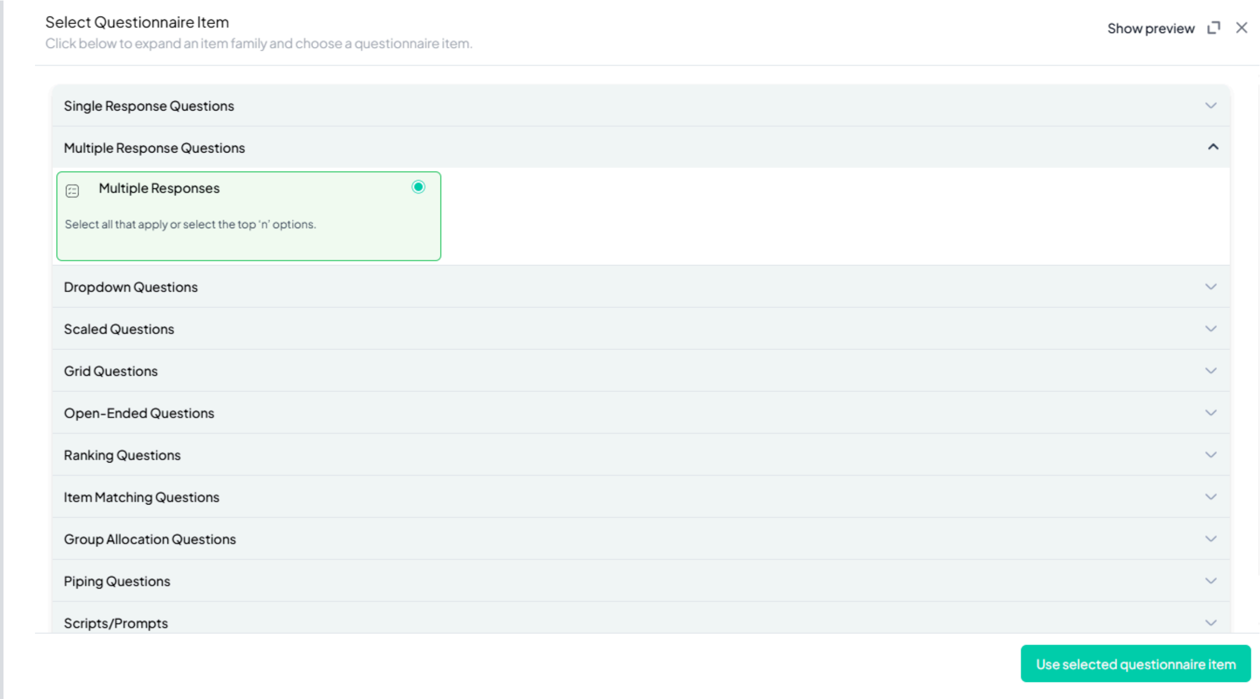
Step 1: Create a New Question

To begin creating a Multiple Response Question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

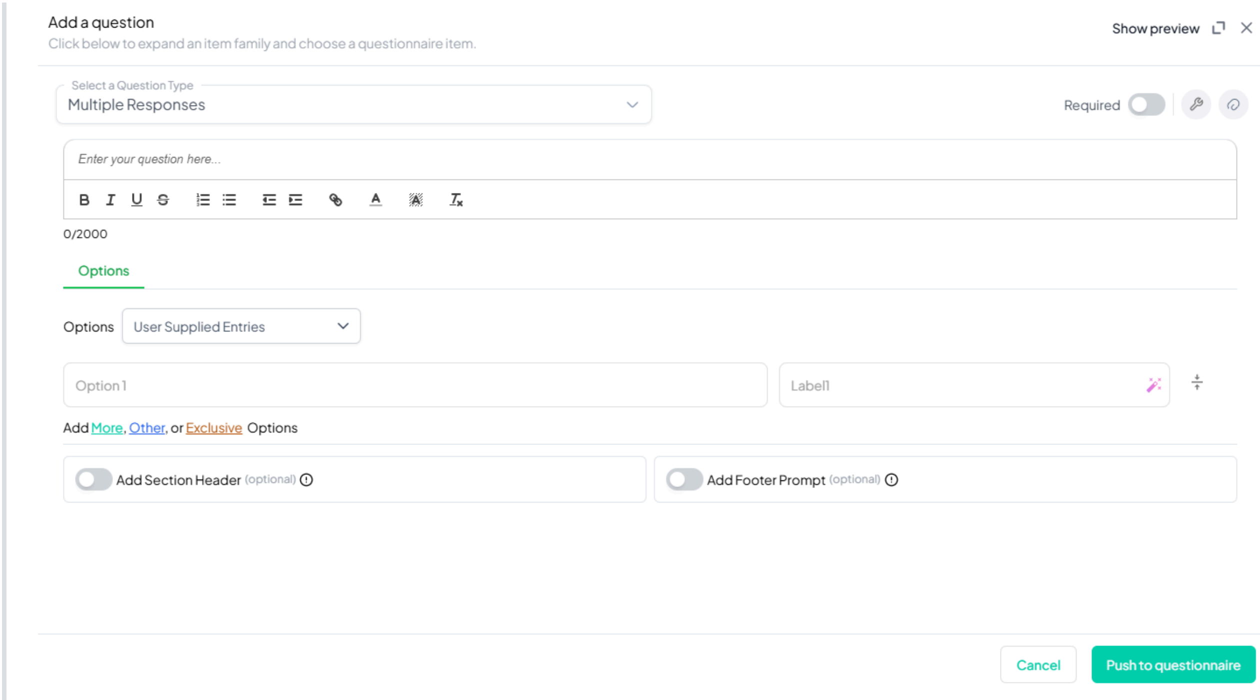
Step 2: Select the Question Type

1. In the question type section, select **Multiple Response Questions.**
2. Choose **Multiple Responses**.
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the multiple response, you will be prompted to add your question. Enter your question in the provided text box.
   Example: Which of the following Latin statements have you ever heard of before today? Please, select all that apply.
2. Apply formatting using the toolbar.
3. You must also add a label for each of the responses to help identify them within your survey.



Step 4: Define the Response Options

1. Enter the options from which respondents can choose. Each option should represent one unique answer to your question.
   Example:

- Recte Sapere Fons
- Gradatim Ferociter
- Veni, vidi, vici
- E pluribus unum
- Carpe diem
- Amor vincit omnia
- Per aspera ad adstra
- Cogito, ergo sum

2. If you want to add additional response options, click **More** and type the new responses. Additionally, you can use the **“Other”** option to enable an

open-text response field. Furthermore, you can use the **Exclusive** which hen selected, excludes all other choices, e.g., "none of the above"

3. Also, the user can explore system options for responses they do not want to type manually. This is especially useful for very exhaustive options like countries of the world, but the platform contains an extensive array of options you can simply use without having to type options manually (use system-supplied or dynamic entries if needed).

Step 5: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here’s how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, “View the media below, then answer the following question.”

Step 7: Set Response Limits (Optional)

If you want to limit the number of responses for a particular option, follow these steps:

1. Click the response limit icon (next to Required toggle).
2. Enable **Hide specific options after X responses**.

3. Enter a response cap for each option(e.g., 50). Once this limit is reached, the option will no longer be displayed to participants.

Step 8: Set Individual Response Limits:

1. Click the **Settings** icon (after the Required toggle) and set a maximum selectable number of options. All that apply (default): Allows multiple selections.

Step 9: Use Option Filtering (Optional)

Option filtering allows you to conditionally display a subset of response options to certain groups of respondents based on their answers to previous questions.

1. Click the **Option Filtering** button.
2. Select the question(s) you want to use to define the subset of respondents.
3. Choose the conditions for filtering (e.g., participants aged 18-30).
4. Select the options that should be shown to this subset of respondents.
5. Respondents who meet the condition will only see the filtered options. All others will see the full list of options.

Rotation Options

Chisquares offers several rotation options for MCQs to minimize bias in responses. You can manage these settings from the question setup page:

1. **Keep All Responses Fixed:** All participants will see the options in the same order.
2. **Rotate All Responses:** The order of options is randomized for each participant.
3. **Fix Some, Rotate Others:** Select a few options to remain fixed in their order, while the others rotate.

How to Set Rotation

1. Click on the **Rotation Options.**
2. Choose the desired rotation behavior.
3. Save your settings.

Preview Mode

Before finalizing the multiple response question, it's important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your multiple response setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

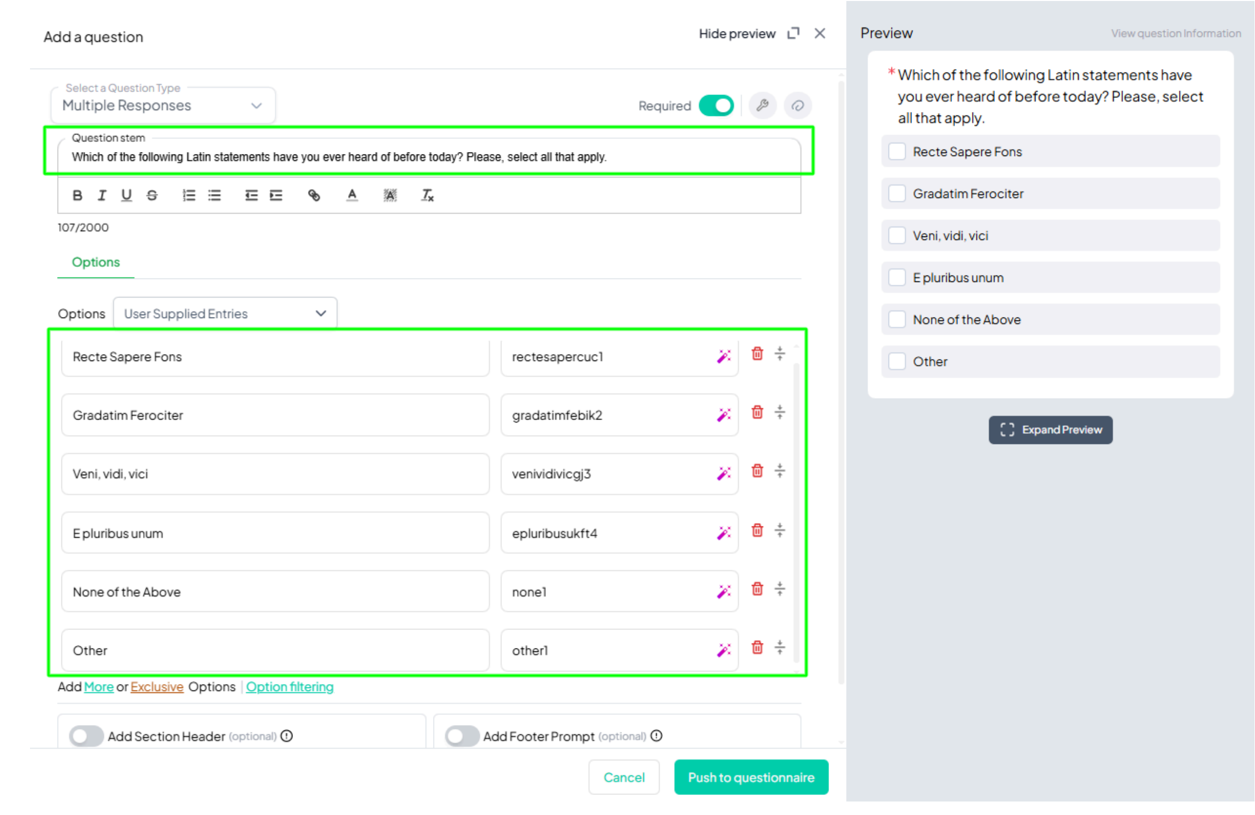
> **Question:** Which of the following Latin statements have you ever heard of before today? Please, select all that apply.
> **Options:**
>
> - Recte Sapere Fons
> - Gradatim Ferociter
> - Veni, vidi, vici

- E pluribus unum
- None of the above *(exclusive option)*
- Other: ____ *(open-text field)*

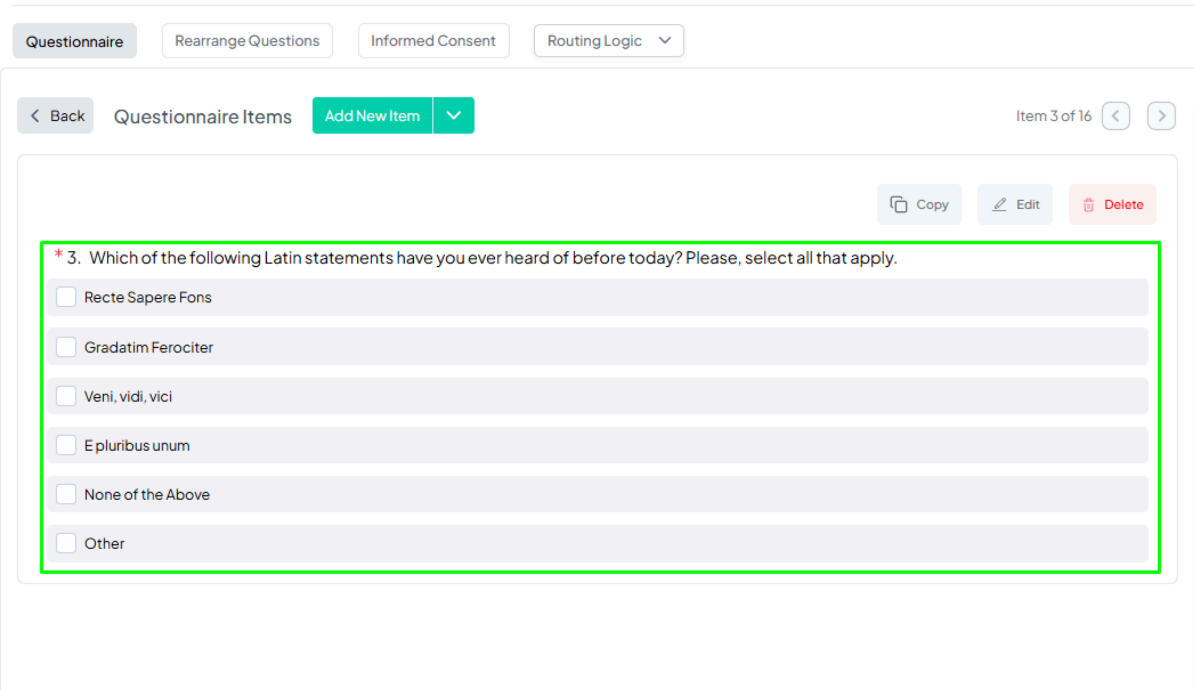
Additional Settings:

- **Required:** Yes
- **Response Limit:** 50 for
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

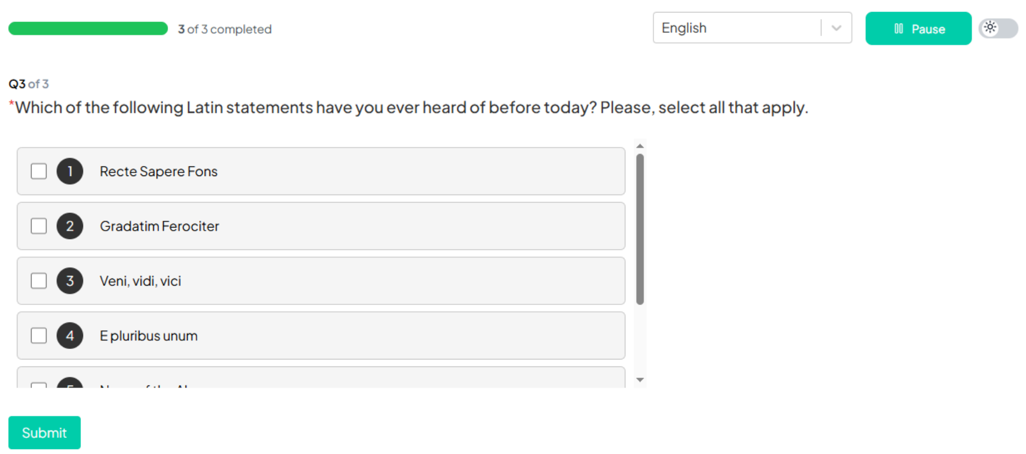
Multiple Response Questions Added



Multiple Response Questions Pushed Preview



Multiple Response Questions Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares offers a powerful, user-friendly engine for designing and managing Multiple Response Questions, giving you full control and flexibility in how data is collected, filtered, and analyzed.

Key platform-specific advantages include:

- **Flexible Option Configuration**: Add manual, system-supplied, or dynamically linked response lists (e.g., countries, product catalogs).
- **“Other” & Exclusive Options**: Include write-in fields and mutually exclusive choices like “None of the above.”
- **Image-Based Options**: Replace text with visual answers and captions for better engagement.
- **AI Labeling**: Use AI to automatically generate clean, meaningful variable names for each response.
- **Option Filtering**: Dynamically show only relevant choices based on previous answers to reduce clutter and improve user focus.
- **Response Limits**:
  - *Per Respondent*: Set a maximum number of selections allowed (e.g., choose up to 3).
  - *Per Option*: Hide an option after a quota (e.g., 50 selections) has been met.
- **Rotation Logic**:
  - *Fixed Order*: All users see the same option order.
  - *Shuffle All*: Randomize all responses to minimize bias.
  - *Fix Some, Shuffle Others*: Lock key options like “Other” or “None of the Above” in place while shuffling the rest.

- **Cleaner Data Output**: Each response is stored as a separate variable, eliminating messy entries and simplifying analysis.

These features make Multiple Response Questions on Chisquares ideal for **high-volume, logic-driven, and data-rich surveys**.

Conclusion

The Multiple Response Question on Chisquares empowers researchers to create dynamic, flexible surveys tailored to their specific needs. With its advanced features, you can ensure data quality, improve respondent experience, and gather meaningful insights. Start using Multiple Response Questions today to elevate your surveys and achieve smarter data collection.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / DROPDOWN

Introduction

The Dropdown question type allows respondents to select an answer from a list of predefined options displayed in a dropdown menu. This format is particularly useful when you have a long list of options and want to keep the survey interface clean and efficient. With Chisquares, setting up and managing Dropdown questions is straightforward, providing flexibility in option presentation, response collection, and user experience management.
This guide will walk you through the process of setting up and configuring Dropdown questions, including basic setup, advanced features, and example use cases.

Features of Dropdown Questions in Chisquares

- **Question Text Input:** Create and format the core question prompt.
- **Response Options:** Define selectable answers manually or dynamically.
- **Required Toggle:** Make the question mandatory to proceed.

- **“Other” Option:** Enable an open-text response field.
- **Media Attachments:** Support for audio, image, or video file uploads.
- **Response Shuffling:** Rotate or fix option orders to reduce bias.
- **Response Limits:** Hide options after a predefined number of selections.
- **Dynamic Sourcing:** Import options from files or previous questions.

Use Cases

The **Dropdown Question** type is designed for scenarios where you need to present a long list of options in a clean, compact interface. This makes it ideal for surveys targeting broad demographic ranges or datasets with many variables. Dropdowns simplify the visual load on respondents and enhance the mobile experience.

Common use cases include:

- **Geographic Selection**: Present countries, states, or cities without overwhelming the screen.
  Example: “What is your country of residence?”

- **Demographic Data Collection**: Collect structured data such as age groups, income brackets, or education levels.
  Example: “What is your highest level of education?”

- **Product or Service Selection**: Allow participants to choose from extensive product catalogs or service options.
  Example: “Which brand have you purchased in the last 12 months?”

- **Educational Assessments**: Display long lists of possible answers or academic terms while keeping the interface compact.
  Example: “Which of the following Latin phrases have you ever heard of before today?”

When to Use Dropdown Questions

Use Dropdown Questions when:

- You have **more than 5–7 answer choices** and want to maintain a clean, efficient layout.
- You need to **optimize surveys for mobile or compact interfaces**, avoiding long scrolling lists.
- The answer options are **predefined and structured**, especially when collecting standardized data like country names or industry categories.
- You want to **minimize visual fatigue** while maintaining answer diversity.

Scenario-Based Example
During an international conference registration, rather than displaying all 195 countries at once, a dropdown lets users scroll and select their country efficiently—keeping the form neat and user-friendly across devices.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Label the Question

- Add a label to help identify the question within your survey. Alternatively, you can use AI to get suggestions for the label.

3. Add Answer Options

- Manually input up to 2 default options and add more by clicking More.
- Choose from User Supplied, System Supplied, or Import Options (CSV/JSON/Excel).

4. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

5. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Advanced Features

1. Response Limit per Option
Enable hiding of options after a specified number of responses (e.g., only allow 10 users to select Option A).

2. Response Shuffling

- Choose among:
    - Keep all responses fixed
    - Shuffle all responses
    - Fix some, shuffle others

3. Option Filtering

- Show specific options to specific respondent segments based on earlier answers.

Step-by-Step Guide

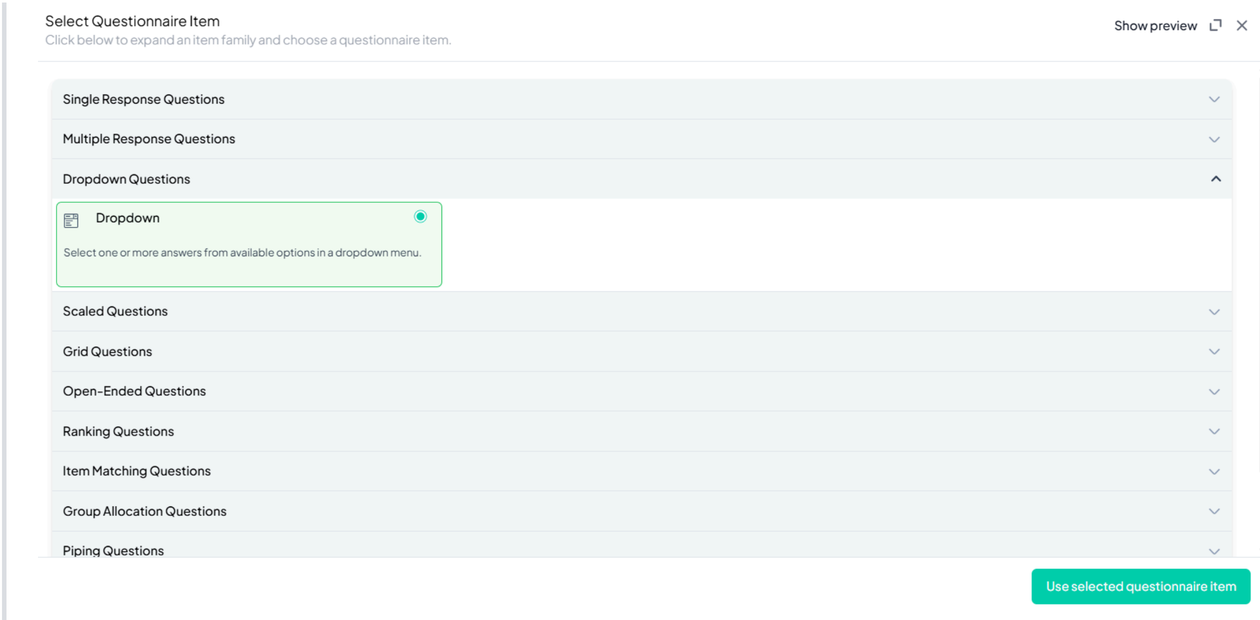
Step 1: Create a New Question
To begin creating a Dropdown question:

1. Log into your **Chisquares Investigator Portal.**

2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

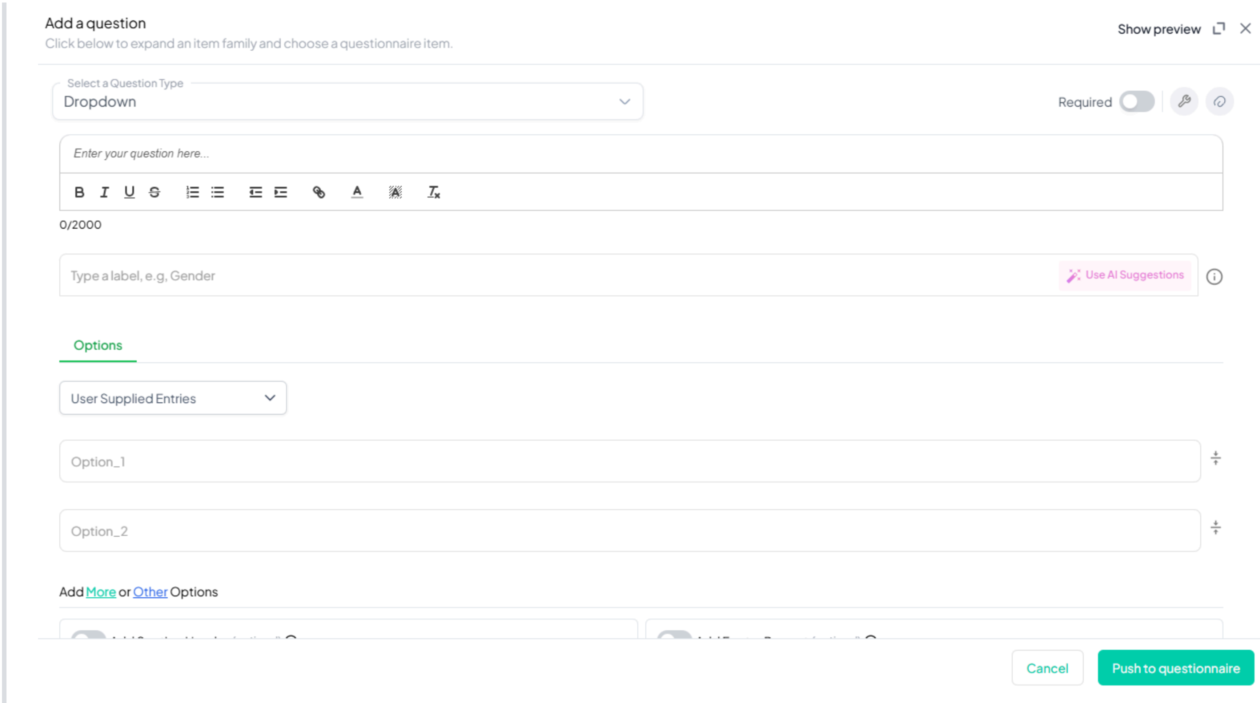
Step 2: Select the Question Type

1. In the question type section, select **Dropdown Questions.**
2. Select **Dropdown.**
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the Dropdown question type, you will be prompted to add your question. Enter your question in the provided text box.
   Example: *Which of the following Latin statements have you ever heard of before today? Please, select all that apply.*
2. Apply formatting using the toolbar.
3. You must also add a label to help identify the question within your survey.



Step 4: Define the Response Options

1. Enter the options from which respondents can choose. Each option should represent one unique answer to your question. Example:

- Recte Sapere Fons.
- Gradatim Ferociter
- Veni, vidi, vici
- E pluribus unum
- Carpe diem
- Amor vincit omnia
- Per aspera ad adstra
- Cogito, ergo sum

2. If you want to add additional response options, click **More** and type the new responses. Additionally, you can use the **“Other”** to enable an open-text response field.

3. Also, the user can explore system options for responses they do not want to type manually. This is especially useful for very exhaustive options like countries of the world, but the platform contains an extensive array of options you can simply use without having to type options manually (use system-supplied or dynamic entries if needed).

Step 5: Make the Question Required (Optional)
If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)
You can upload media (images, videos, or audio files) to accompany the question. Here's how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, "View the media below, then answer the following question."

Step 7: Answer Preferences Configuration
You can configure answers preferences to allow one selected answer, or multiple selected answers. Here is how:

1. Click on the **Settings** icon (next to the **Required** toggle).
2. Select **Allow only one selected answer** (*default*), which allow respondents choose only one option, or **Allow multiple selected answers**, which converts the dropdown into a multi-select format.
3. Click **Apply.**

Step 8: Shuffling of Responses Chisquares offers several rotation options for dropdown to minimize bias in responses. You can manage these settings from the question setup page:

1. **Keep All Responses Fixed:** All participants will see the options in the same order.
2. **Rotate All Responses:** The order of options is randomized for each participant.
3. **Fix Some, Rotate Others:** Select a few options to remain fixed in their order, while the others rotate.

How to Set Response Shuffling

1. Click on the **Settings** icon (next to the **Required** toggle).
2. Choose the desired shuffling behavior. You will need to anchor some questions to specific position if you choose **Fix some, shuffle others.**
3. Click **Apply.**

Step 9: Set Response Limits (Optional)
If you want to limit the number of responses for a particular option, follow these steps:

1. Click the response limit icon (next to Required toggle).
2. Enable **Hide specific options after X responses**.
3. Enter a response cap for each option(e.g., 50). Once this limit is reached, the option will no longer be displayed to participants.

Preview Mode

Before finalizing the Dropdown question setup, it’s important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Dropdown setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

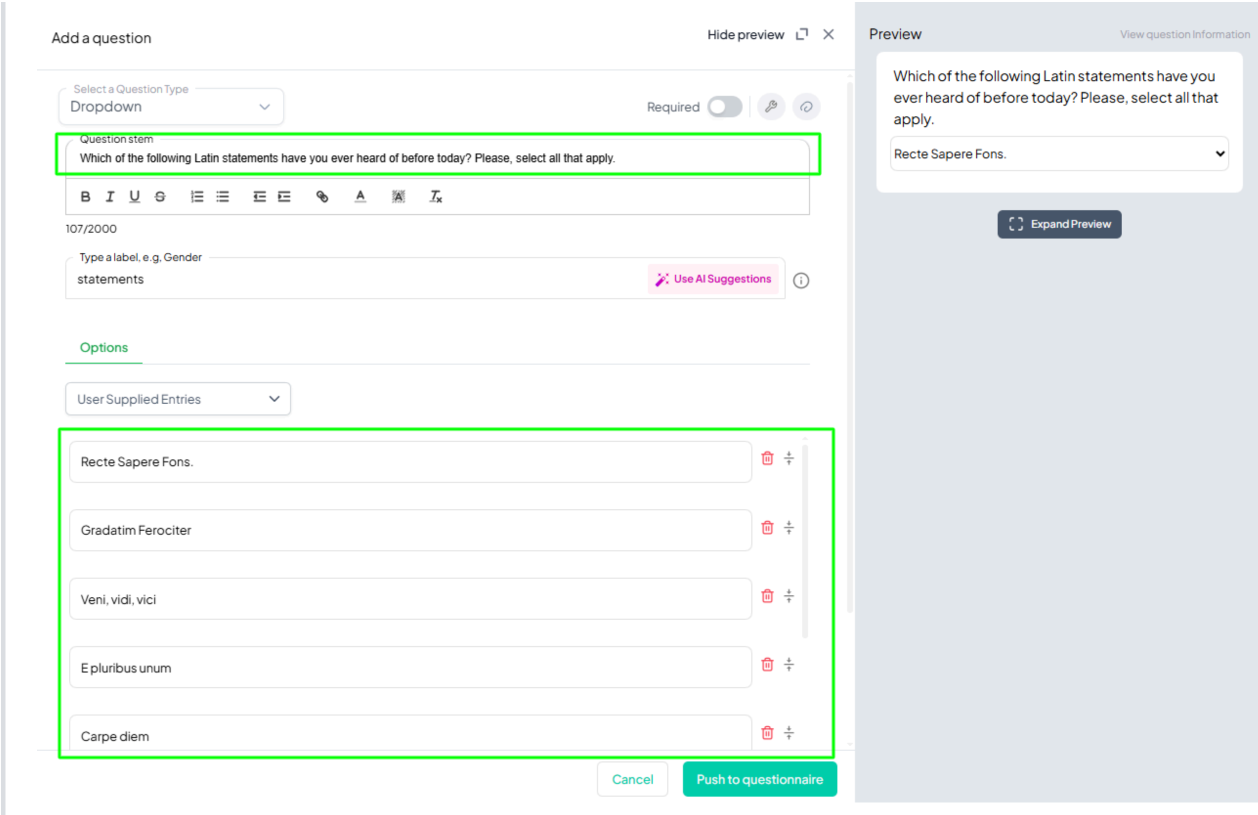
> **Question:** *Which of the following Latin statements have you ever heard of before today? Please, select all that apply.*
>
> ## Response Options:
>
> - Recte Sapere Fons.
> - Gradatim Ferociter
> - Veni, vidi, vici
> - E pluribus unum
> - Carpe diem
> - Amor vincit omnia
> - Per aspera ad adstra
> - Cogito, ergo sum

Additional Settings:

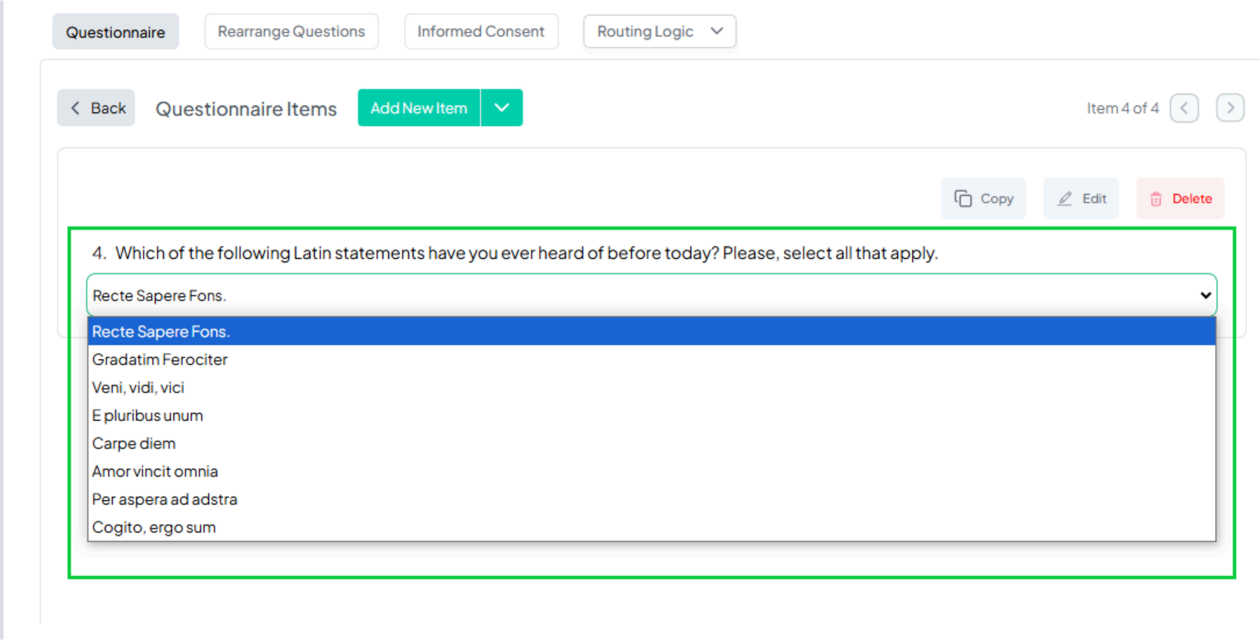
- **Required:** No
- **Response Limit:** 50
- **Answer Preference:** Allow multiple selected answers.
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.

- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

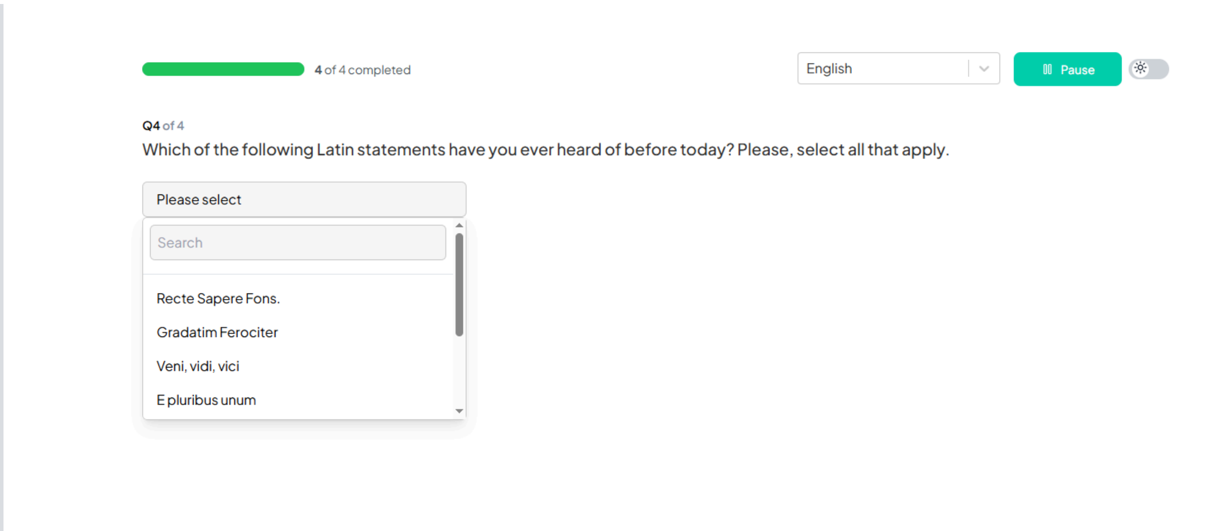
Dropdown Question Added



Dropdown Question Pushed Preview



Dropdown Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares brings depth, control, and flexibility to Dropdown Questions, making them not only efficient but also powerful in complex survey scenarios. Key platform-specific advantages include:

- **Dynamic Sourcing**: Pull response options from existing datasets, files, or previous responses.
- **Answer Preferences**: Choose between single-select (default) and multi-select dropdowns based on your data needs.
- **System-Supplied Lists**: Access preloaded lists such as countries, regions, industries, etc., without manual entry.
- **Image & Media Support**: Attach videos, images, or audio files to support the question prompt.
- **Option Filtering**: Show specific answer choices to different respondent segments using conditional logic.
- **Shuffling Controls**: Randomize, fix, or selectively shuffle options to reduce selection bias.
- **Response Limits**: Cap how many times each option can be selected and hide them after reaching that limit.
- **Clean Data Labels**: Automatically generate variable labels for structured exports, with AI assistance available for customization.

Compared to traditional dropdowns on other platforms, Chisquares offers **enterprise-level flexibility** combined with an intuitive setup interface—ideal for research, education, HR, marketing, and public data collection.

Conclusion

The Dropdown question type on Chisquares offers a user-friendly way to present multiple-choice answers while keeping surveys organized. Whether you're designing event registrations, product preference surveys, or demographic questions, the Dropdown feature provides flexibility and efficiency.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / LIKERT SCALE

Introduction

The Likert Scale question type, named after Rensis Likert, is a widely used tool for measuring attitudes, opinions, or behaviors using a structured response format. Unlike numerical scales, the Likert Scale on Chisquares uses words or adjectives to signify varying degrees of agreement or disagreement. Chisquares provides extensive customization options for Likert Scales, enabling users to modify response options, color settings, scale direction, and more. This manual will guide you through the setup and advanced features of the Likert Scale question type.

Features of Likert Scale Question in Chisquares

- **Customizable Scale Options:** Supports 4-point, 5-point, 7-point, and 10-point scales, with or without a 'Don't Know' option.
- **Scale Color Settings:** Users can apply color gradations where negative responses appear in pink, positive responses in blue, neutral responses in white, and 'Don't Know' in gray.
- **Scale Direction:** By default, the scale progresses from negative to positive, but users can invert this order.
- **Response Modification:** Users can add, delete, reorder, and reword response options.
- **Drag-and-Drop Feature:** Enables users to rearrange response options conveniently.

Use Cases

The **Likert Scale Question** is ideal for capturing nuanced feedback on attitudes, opinions, or behaviors. Unlike binary or multiple-choice formats, Likert scales measure **degrees of sentiment**, allowing researchers to evaluate **how**

strongly respondents agree or disagree, approve or disapprove, or perceive something on a continuum.

Common use cases include:

- **Attitude Measurement**: Evaluate agreement with statements related to values, beliefs, or ideologies.
  Example: "To what extent do you agree or disagree with the idea that the philosophy behind the phrase 'YOLO' represents a good way to live life?"

- **Satisfaction Surveys**: Measure user or customer satisfaction with services, products, or experiences.
  Example: "How satisfied are you with the onboarding process?"

- **Behavioral Assessment**: Understand frequency or intensity of behaviors.
  Example: "How often do you engage in physical activity each week?"

- **Performance Reviews & Peer Feedback**: Use in HR settings to collect structured performance data.
  Example: "The employee demonstrates strong leadership skills."

- **Educational Evaluation**: Gather student feedback on course materials or teaching effectiveness.
  Example: "The instructor explained the concepts clearly."

When to Use Likert Scale Questions

Use Likert Scale Questions when:

- You want to capture **gradations of opinion or feeling**, not just a simple yes/no or one-time action.
- Measuring **levels of agreement, frequency, satisfaction, or quality** is necessary.

- Your analysis will benefit from **quantifiable, ordinal data** that can be averaged or statistically evaluated.
- A binary response (e.g., yes/no) would be too limiting to reflect the participant's true perspective.
- You need to **identify trends across populations** or track changes over time.

Scenario-Based Example

In a post-event survey, you could ask attendees:

> *"How strongly do you agree with the statement: ‘The event met my expectations’?"*
> Options: Strongly disagree, Somewhat disagree, Neutral, Somewhat agree, Strongly agree

This captures both sentiment and intensity, supporting richer analysis and data-driven decisions.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Label the Question

- Add a label to help identify the question within your survey. Alternatively, you can use AI to get suggestions for the label.

3. Answer Options

- Default 4-point scale options

4. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

5. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Advanced Features

1. **Customizing Scale Color**
    - Toggle "Use Scale Color" to apply color gradation to response options.
2. **Adjusting Scale Direction**
    - By default, responses are arranged from negative to positive. Selecting "Invert Scale" reverses this order while maintaining color consistency.
3. **Modifying Response Options**
    - Users can:
        - Add or remove response options
        - Reorder responses using drag-and-drop
        - Change response wording
        - Adjust colors with a color picker or sampler

Step-by-Step Guide

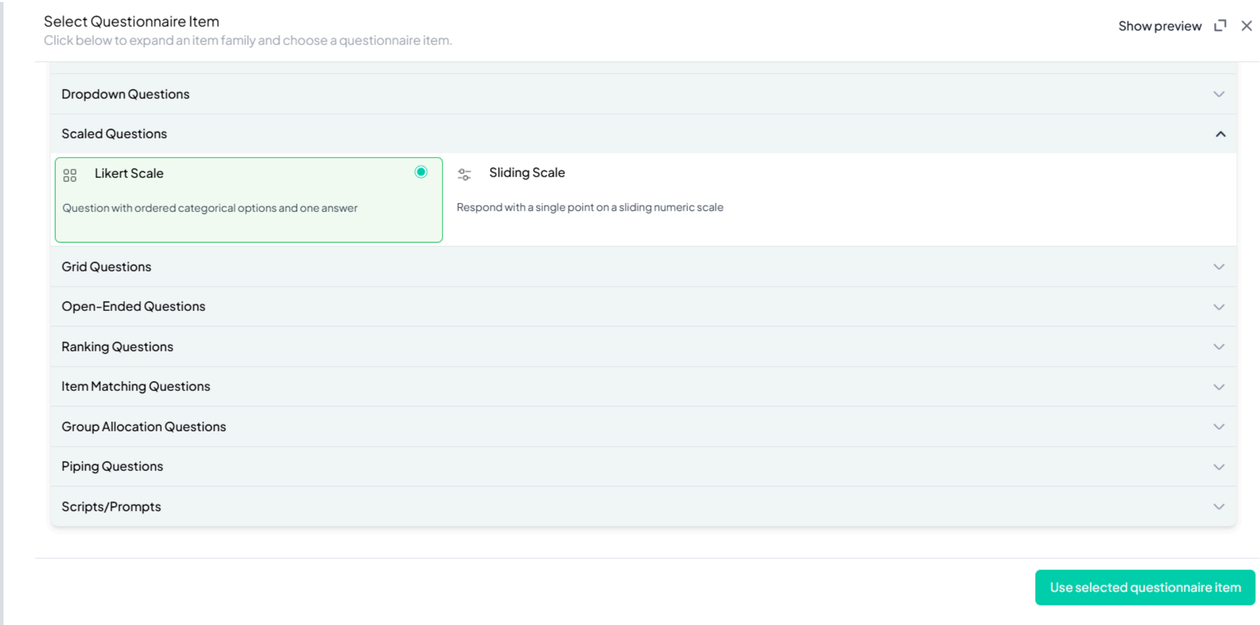
Step 1: Create a New Question
To begin creating a Likert Scale Question:

- Log into the **Chisquares Investigator Portal.**
- Navigate to the **Survey Design** section.

- Click **Create a New Question** button.

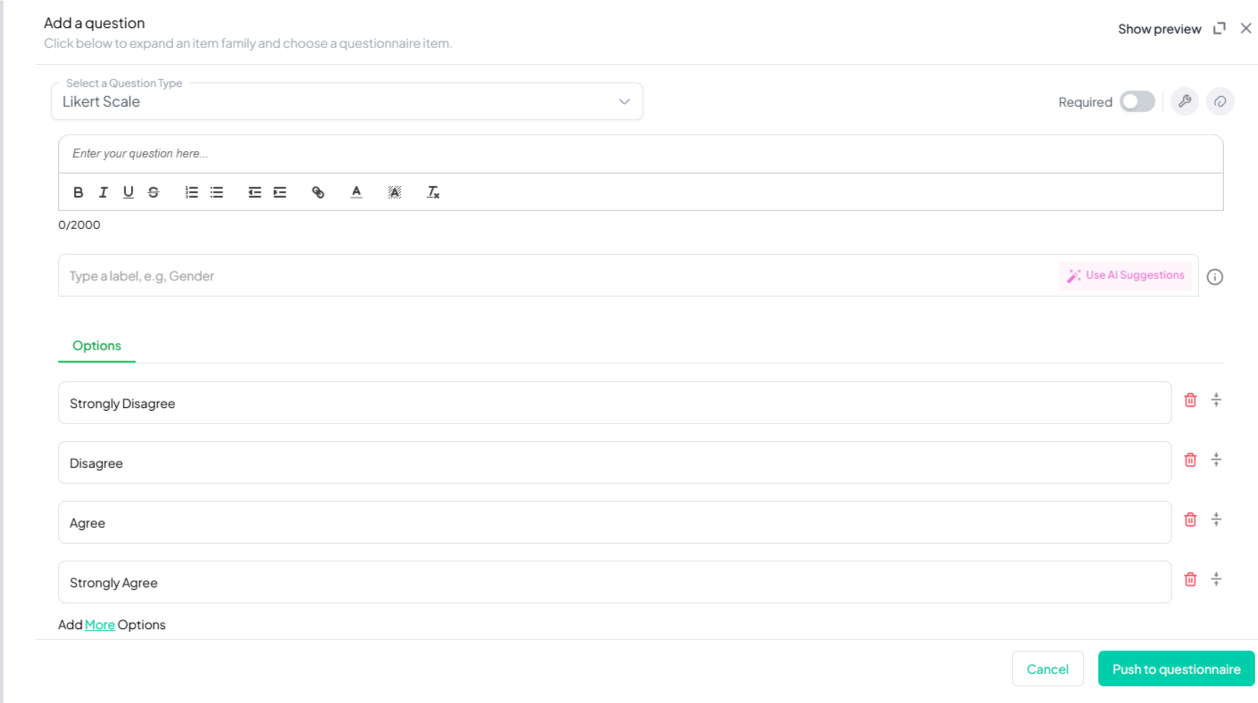
Step 2: Select the Question Type

1. In the question type section, select **Scaled Questions.**
2. Choose **Likert Scale** from the list of available question types.
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the Likert Scale question type, you will be prompted to add your question. Enter your question in the provided text box.
   Example: *To what extent do you agree or disagree with the idea that the philosophy behind the phrase 'YOLO' (You Only Live Once) represents a good way to live life? Please choose one option below.*
2. Apply formatting using the toolbar.
3. You must also add a label to help identify the question within your survey.



Step 4: Define the Scale

Select a scale type (e.g., 5-point, 7-point, or 10-point). Choose whether to include a 'Don't Know' option. The default is a 4-point scale:

- Strongly disagree
- Somewhat disagree
- Somewhat agree
- Strongly agree

Step 5: Configure Color and Direction (Optional)

- Enable or disable **Use Scale Color.**
- Adjust scale direction using **Invert Scale.**

Step 6: Customize Response Options

- Modify, reorder, or delete response options as needed.
- Use drag-and-drop functionality for easy arrangement.

Step 7: Make the Question Required (Optional)
If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 8: Add Media (Optional)
You can upload media (images, videos, or audio files) to accompany the question. Here's how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, "View the media below, then answer the following question."

Preview Mode

Before finalizing the Likert Scale question setup, it's important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Likert Scale setup:

1. Click **Push to Questionnaire** to add the question to your live survey.

2. If you need to make edits later, you can always return to the question editor to make changes.

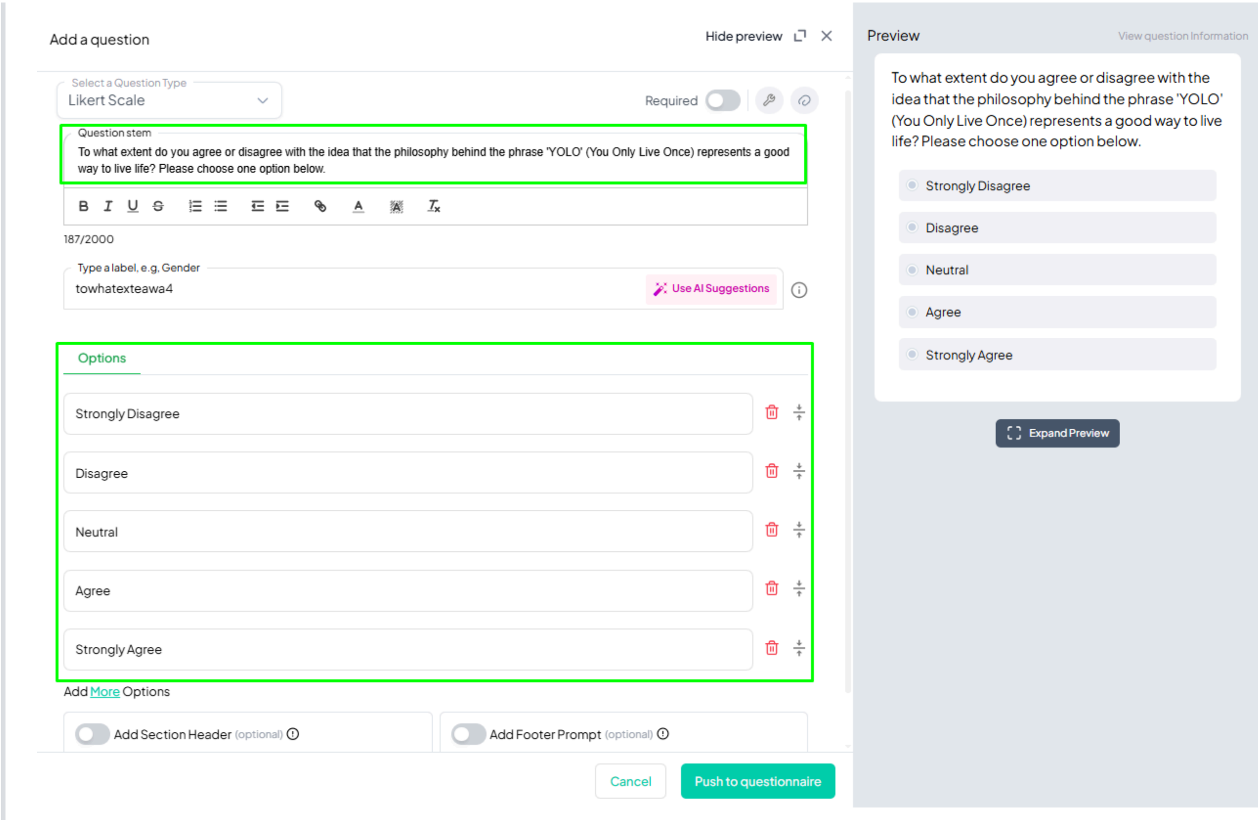
Example Question Setup

> **Question:** >*To what extent do you agree or disagree with the idea that the philosophy behind the phrase 'YOLO' (You Only Live Once) represents a good way to live life? Please choose one option below.*
>
> **Response options**
>
> - Strongly disagree
> - Somewhat disagree
> - Neutral
> - Somewhat agree
> - Strongly agree

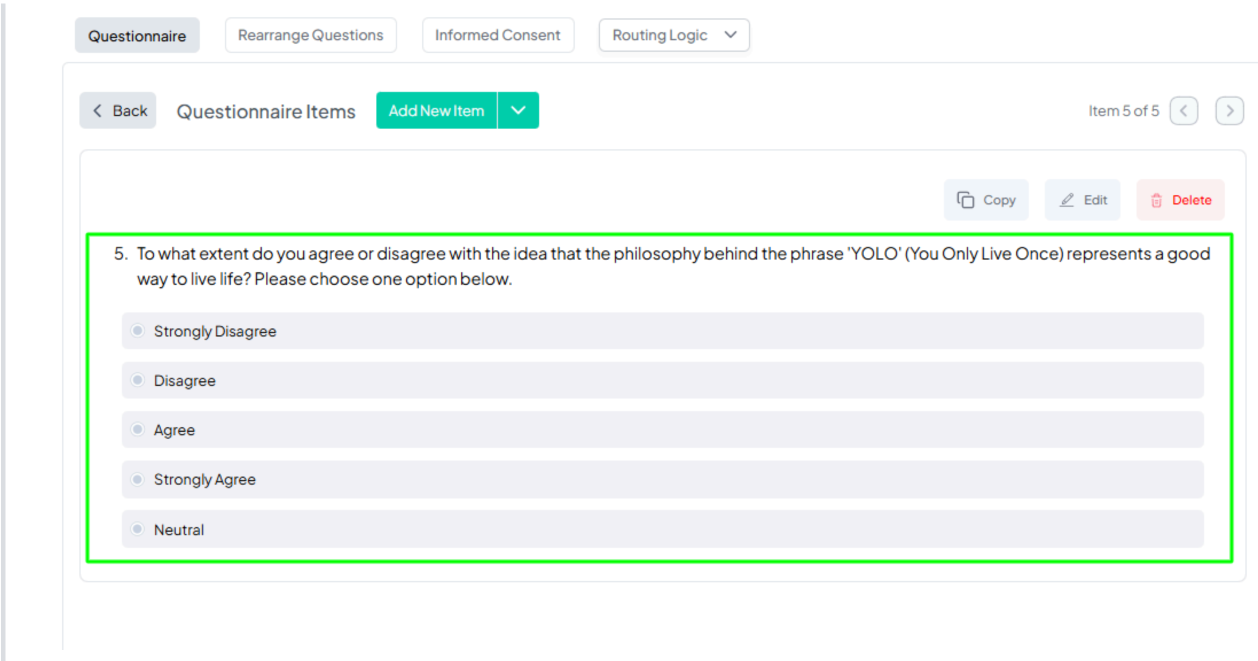
Additional Features:

- **Scale Color:** Enabled
- **Inverted Scale:** No
- **Required:** Yes
- **Image Attached:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

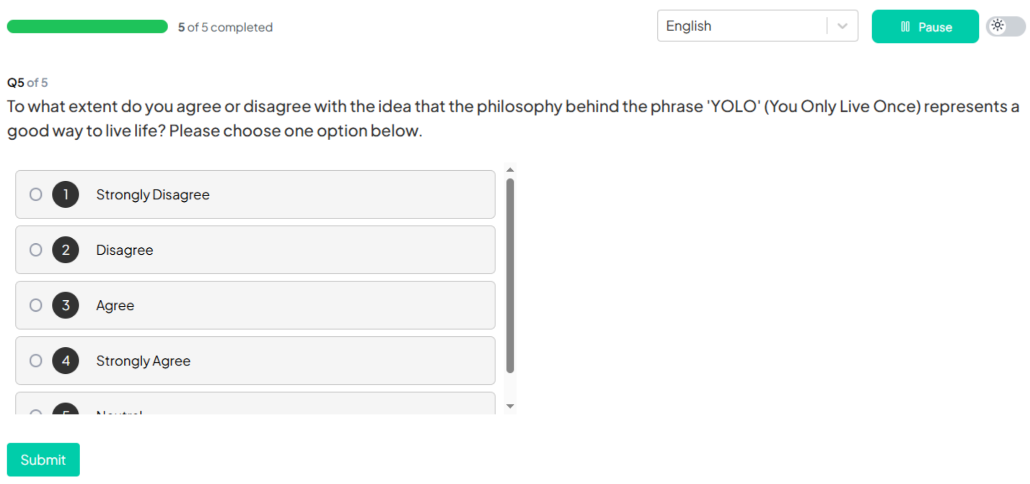
Likert Scale Question Added



Likert Scale Question Pushed Preview



Likert Scale Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares elevates the Likert Scale experience through robust customization and user-centric design features. It is ideal for both simple surveys and complex research requiring precision and flexibility.

Platform-specific advantages include:

- **Customizable Scale Lengths**: Choose from 4-point, 5-point, 7-point, or 10-point scales with optional 'Don't Know' response.
- **Color-Graded Response Scales**: Apply intuitive color patterns (e.g., red to blue) to reinforce emotional tone—pink for negative, white for neutral, blue for positive, and gray for unknown.
- **Invertible Scale Direction**: Choose whether your scale runs from negative to positive or vice versa.
- **Drag-and-Drop Option Management**: Easily reorder and edit response labels to suit your research goals.

- **AI-Assisted Labeling**: Generate or refine variable names for better data structure.
- **Media Integration**: Add images, videos, or audio files to contextualize the scale.
- **Preview & Real-Time Adjustments**: See the question exactly as participants will and make edits instantly.
- **Consistent Export Structure**: Data from each Likert item is standardized and compatible with common analysis tools (e.g., SPSS, R, Excel).

These tools ensure Likert Scales on Chisquares are not only functional but **highly adaptable for academic, market, or behavioral research**.

Conclusion

The Likert Scale feature in Chisquares provides a powerful way to collect structured feedback. Its customization options, including response modifications, scale color, and direction adjustments, ensure a flexible and user-friendly experience. By following this guide, you can efficiently set up and manage Likert Scale questions tailored to your survey needs.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / SLIDING SCALE

Introduction

A Sliding Scale Question is a versatile tool for capturing nuanced responses from participants using a visual scale. Unlike multiple-choice questions, which present categorical options, sliding scale questions collect numeric data, allowing respondents to indicate their level of agreement, satisfaction, or other subjective measures with greater precision.
With Chisquares, setting up and customizing sliding scale questions is seamless, providing full control over the scale range, intervals, and labels. This manual will guide you through the process of configuring sliding scale questions, including advanced features such as customizing scale appearance, setting default values, and implementing conditional logic.

Features of Sliding Scale Questions in Chisquares

- **Customizable Scale Range:** Define the minimum and maximum values for the scale.

- **Adjustable Intervals:** Choose step sizes for finer or broader granularity in responses.
- **Predefined and Custom Labels:** Add descriptive labels to guide respondents in selecting their responses.
- **Required Response Option:** Ensure participants must answer before proceeding.
- **Visual Representation:** Enhances user engagement through an interactive slider.
- **Default Value Setting:** Predefine a starting position on the scale.

Use Cases

The **Sliding Scale Question** is ideal for collecting quantitative feedback with precision, especially in cases where respondents need to express degrees of sentiment or intensity. Unlike fixed-response types, this question offers continuous or interval-based data points, enabling more nuanced analysis.

Common use cases include:

- **Agreement Rating**: Capture how strongly respondents agree or disagree with a statement.
  Example: “Using a scale from 0 to 100, how much do you agree with the philosophy of 'YOLO' (You Only Live Once) as a guiding principle for life?”

- **Satisfaction Measurement**: Measure customer, employee, or participant satisfaction on a numeric scale.
  Example: “How satisfied are you with our support service today?”

- **Performance Evaluation**: Rate competencies, skills, or outcomes in HR and education contexts.
  Example: “Rate your confidence in using this tool effectively.”

- **Preference and Intensity Scoring**: Capture how much someone prefers one item over another or the strength of their reaction.
  Example: "How likely are you to recommend this product to others?"

When to Use Sliding Scale Questions

Use Sliding Scale Questions when:

- You need to **measure intensity, frequency, or agreement** on a continuum.
- A binary or categorical choice would be **too limiting** to reflect subtle differences.
- You're collecting **interval or ratio data** that supports advanced statistical analysis.
- The visual nature of a slider will enhance user engagement and response quality.
- You want to **standardize measurement** across multiple dimensions (e.g., comparing products, services, or teams).

Scenario-Based Example
In a product feedback survey, you might ask:

> *"Using a scale from 0 to 100, how satisfied are you with the speed of delivery?"*
> This provides more granular insight than a 5-point scale, enabling better product optimization.

Basic Setup

1. Question Text: Define the question prompt that participants will see.

2. Scale Range: Set the minimum and maximum values (e.g., 0 to 100).

3. Interval Steps: Specify the step size (e.g., increments of 1, 5, or 10).

4. Labels: Define labels for the scale endpoints (e.g., "Very Dissatisfied" to "Very Satisfied").

Advanced Features

1. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

2. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Step-by-Step Guide

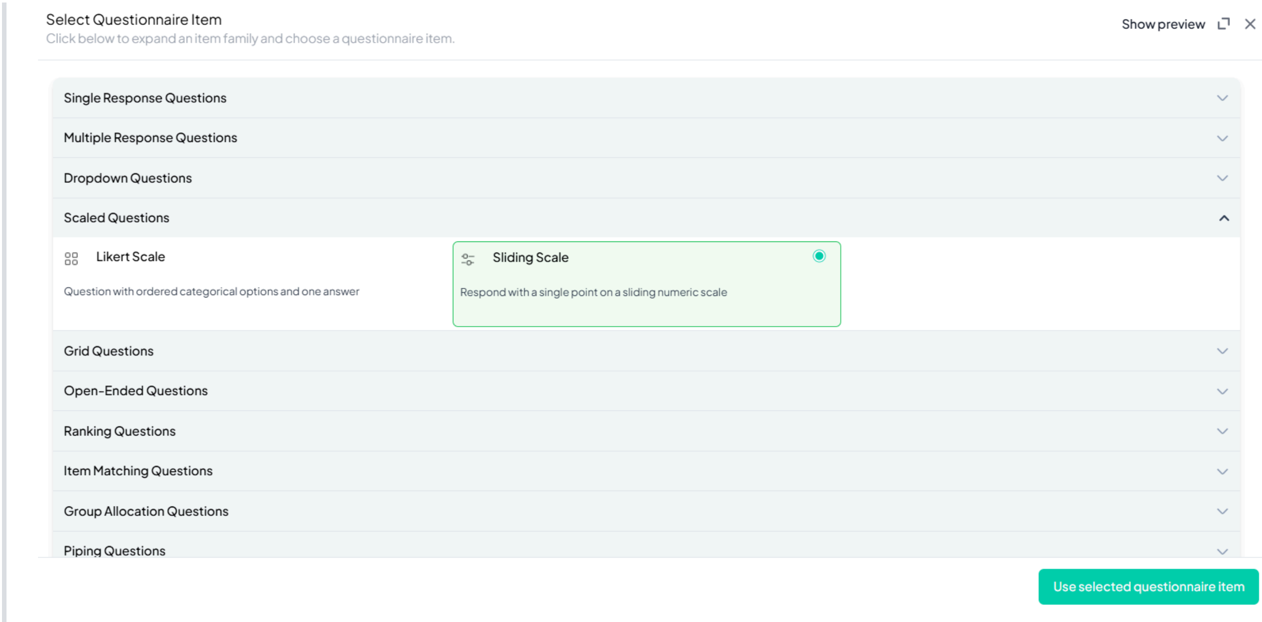
Step 1: Create a New Question

To begin creating a Sliding Scale Question:

- Log into the **Chisquares Investigator Portal.**
- Navigate to the **Survey Design** section.
- Click **Create a New Question** button.

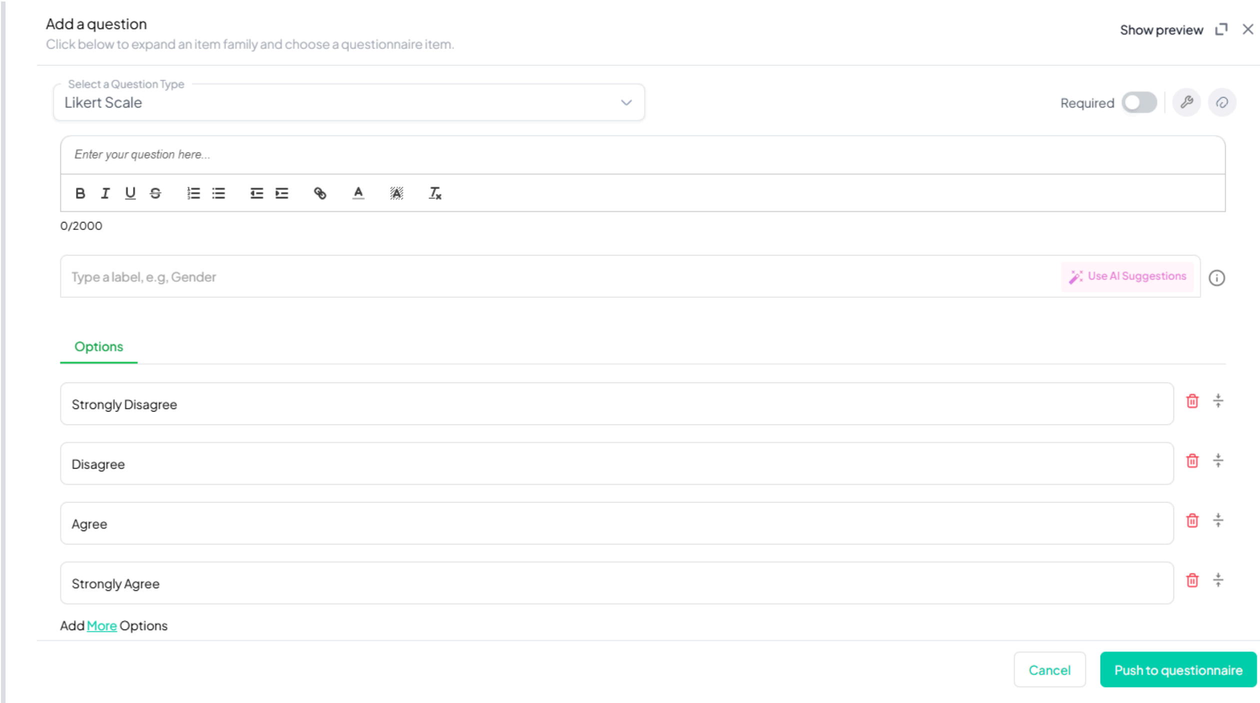
Step 2: Select the Question Type

1. In the question type section, select **Scaled Questions.**
2. Choose **Sliding Scale** from the list of available question types.
3. Click **Use selected questionnaire item**



Step 3: Add Your Question

1. After selecting the Sliding Scale question type, you will be prompted to add your question. Enter your question in the provided text box.
   Example: *Using a scale from 0 to 100, how much do you agree with the philosophy of 'YOLO' (You Only Live Once) as a guiding principle for life? Move the slider to reflect your sentiment, where 0 means complete disagreement and 100 means full agreement."*
2. Apply formatting using the toolbar.
3. You must also add a label to help identify the question within your survey.



Step 4: Define the Scale Settings

1. Set the **minimum** and **maximum** values.
2. Choose the **step interval** (e.g., 1, 5, 10).
3. Add **labels** to describe the endpoints (Optional).

Step 5: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here's how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).

3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, “View the media below, then answer the following question.”

Preview Mode

Before finalizing the Sliding Scale question setup, it is important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Sliding Scale setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

Using a scale from 0 to 100, how much do you agree with the philosophy of 'YOLO' (You Only Live Once) as a guiding principle for life? Move the slider to reflect your sentiment, where 0 means complete disagreement and 100 means full agreement."

Scale Settings:

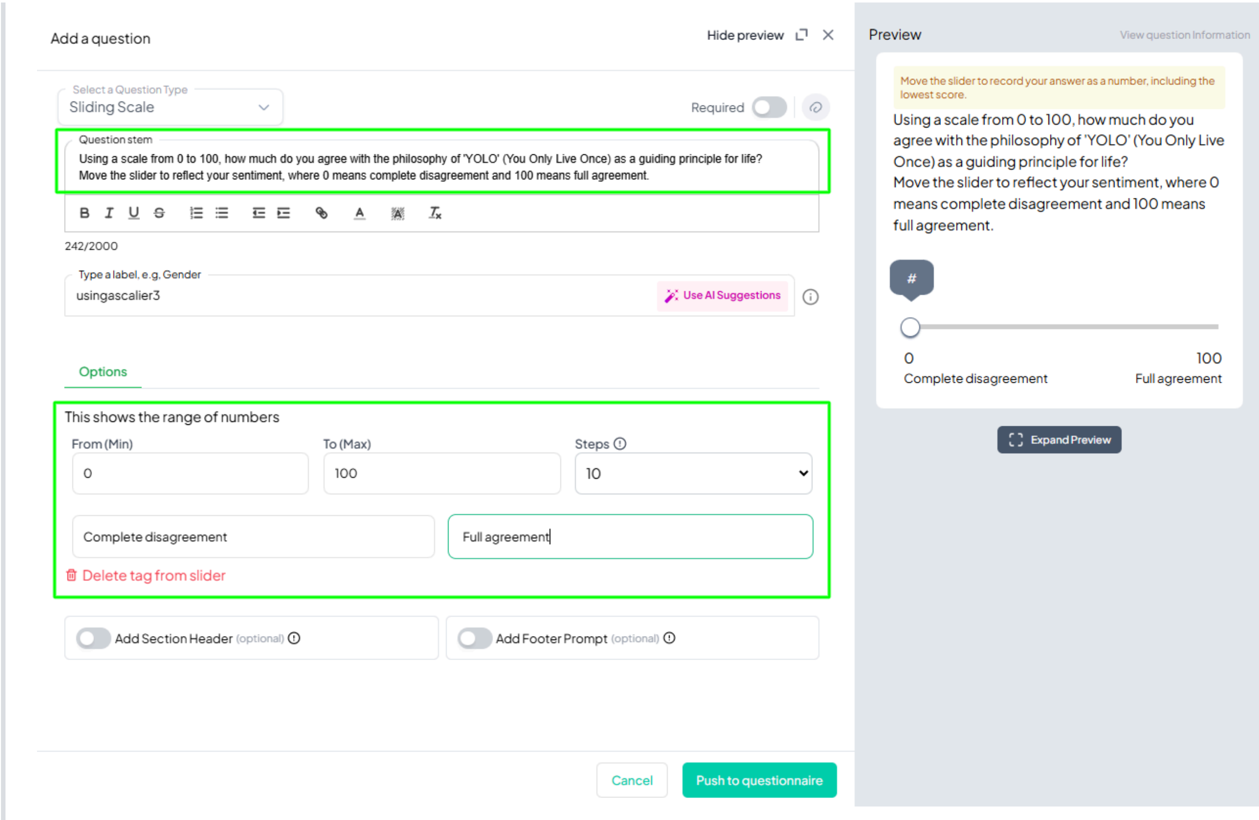
Minimum Value: 0 **Maximum Value:** 100
Step Interval: 10

> **Question:** Using a scale from 0 to 100, how much do you agree with the philosophy of 'YOLO' (You Only Live Once) as a guiding principle for life? Move the slider to reflect your sentiment, where 0 means complete disagreement and 100 means full agreement.
>
> **Scale Configuration:**
>
> - **Minimum Value:** 0
> - **Maximum Value:** 100
> - **Step Interval:** 10
> - **Scale Labels:**
>   - 0: *Complete Disagreement*
>   - 100: *Full Agreement*

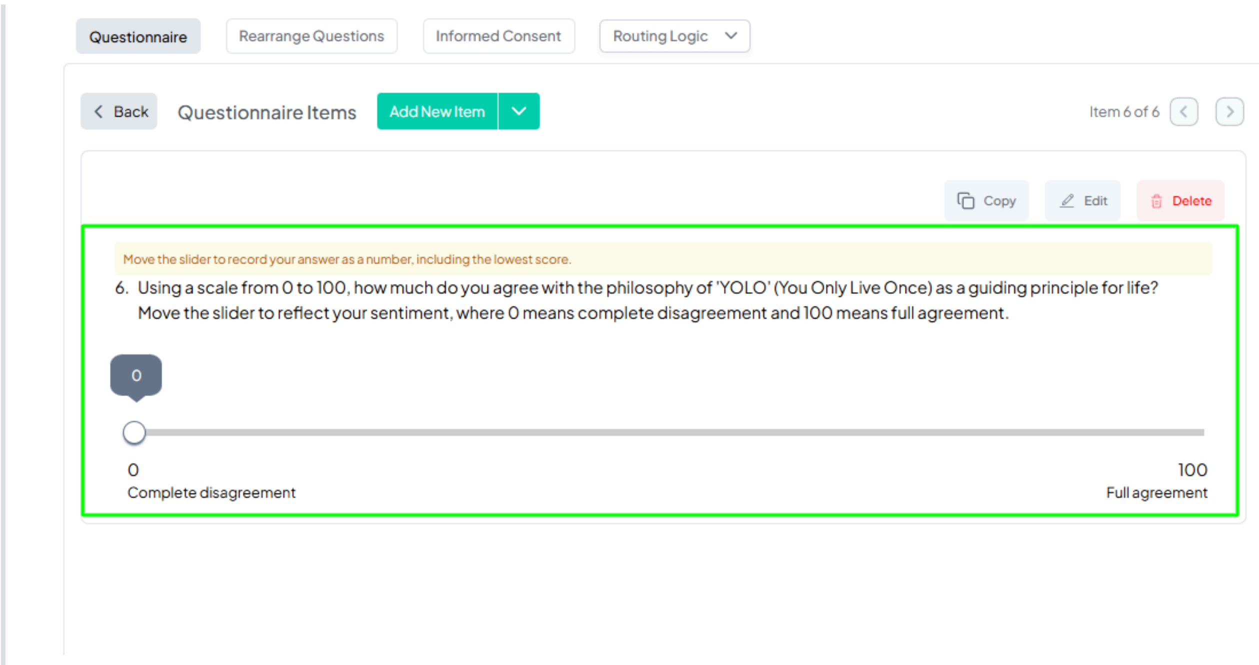
Additional Features:

- **Required:** No
- **Image Attached:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

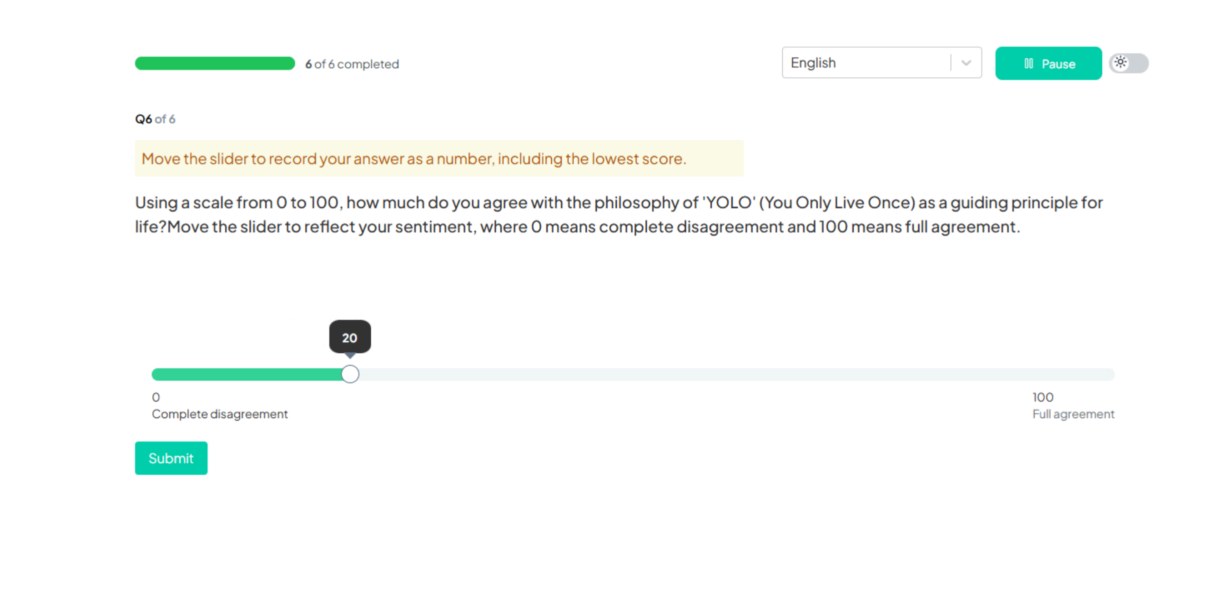
Sliding Scale Question Added



Sliding Scale Question Pushed Preview



Sliding Scale Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares offers robust capabilities for designing and deploying Sliding Scale Questions with full customization, enabling accurate data collection in a visually engaging format.

Key platform-specific advantages include:

- **Custom Scale Ranges**: Define any minimum and maximum values (e.g., 0–10, 0–100, -50–50).
- **Adjustable Step Intervals**: Choose increments for granular or broad responses (e.g., steps of 1, 5, 10).
- **Predefined & Custom Labels**: Assign descriptive tags at endpoints to anchor the meaning of values (e.g., “Very Dissatisfied” to “Very Satisfied”).
- **Default Value Settings**: Pre-select a midpoint or preferred default position on the slider.

- **Media Support**: Embed visuals, audio, or video to add context or demonstrate what's being rated.
- **Required Response Toggle**: Prevent unanswered questions and enforce completeness.
- **Responsive Design**: Seamlessly works across desktop and mobile interfaces.
- **Preview and Edit Mode**: Test question functionality before publishing, with full flexibility to modify as needed.

These features ensure Sliding Scale Questions on Chisquares provide **both analytic depth and an intuitive respondent experience**.

Conclusion

Sliding Scale Questions in Chisquares provide an intuitive way to collect quantitative feedback. By offering customizable scales, labels, and advanced features like conditional logic, this question type enhances data collection and analysis. Whether used for satisfaction surveys, performance evaluations, or preference assessments, the sliding scale question ensures precise and meaningful insights.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / MATRIX

Introduction

The Matrix question type on the Chisquares platform allows researchers to streamline the process of gathering structured responses across multiple related questions. This feature is particularly useful when a fixed set of response options applies to multiple question stems, making data collection efficient and structured.
With the Matrix question type, users can input a set of row items (question stems) and a corresponding set of answer choices (columns). Each row can act as an independent data variable, ensuring precise data analysis.
This guide provides a comprehensive overview of setting up and utilizing Matrix questions effectively on the Chisquares platform.

Features of Matrix Questions in Chisquares

- **Question Setup:** Input stems and corresponding answer choices, similar to Multiple Choice Questions (MCQs).

- **Row-Specific Labels:** Each row has a distinct label, ensuring data integrity and clarity.
- **Customizable Column and Row Limits:** Up to 9 columns and 12 rows can be added per Matrix question.
- **Multimedia Inclusion:** Ability to add images, videos, and audio to enhance the question setup.
- **Flexible Response Selection:** Choose between radio buttons (single response) or checkboxes (multiple responses).

Use Cases

The **Matrix Question** is ideal for collecting structured data across multiple related statements using a unified response scale. This format streamlines the experience for both respondents and researchers, especially when the same response options apply across several items. It reduces redundancy while maintaining consistency in measurement.

Common use cases include:

- **Attitudinal Surveys**: Capture agreement or disagreement across a set of related beliefs or opinions.
  Example: “Please indicate the extent to which you agree or disagree with the following statements about the philosophy of 'YOLO'.”

- **Customer or Employee Feedback**: Evaluate multiple service attributes or job satisfaction elements at once.
  Example: “How would you rate the following aspects of our service?”

- **Performance Reviews**: Assess different competencies using the same rating scale.
  Example: “Please rate the following skills for your team lead.”

- **Educational Assessments**: Evaluate several learning outcomes or course features using a common scale.
  Example: “Rate your level of understanding of the following topics.”

When to Use Matrix Questions

Use Matrix Questions when:

- You want to **collect feedback on multiple items using the same scale** for consistency.
- Your goal is to **reduce survey length and visual clutter** by consolidating questions.
- The items being evaluated are **conceptually related**, making it easier for respondents to process and compare.
- You’re conducting **quantitative analysis** that benefits from standardized response formats.
- You need to balance **efficiency and structure**, especially in professional or academic surveys.

Scenario-Based Example

In a behavioral study, a Matrix question might ask:

> *“Please indicate the extent to which you agree or disagree with the following statements about the philosophy of 'YOLO' (You Only Live Once).”*
> This enables structured analysis across multiple dimensions of the same theme without overwhelming the participant.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Add Answer Options

- Enter row items (question stems) in the Row Items field.
- Assign a unique label to each row.
- Define the column headers (answer choices).
- The system automatically prevents exceeding the 9-column and 12-row limits.

4. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

5. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Answer Preference

Users can define how responses are collected:

- **One option per row (Radio Buttons):** Allow selection of one option per row.
- **Multiple options per row (Checkboxes):** Allow selection of multiple options per row.

Step-by-Step Guide

Step 1: Create a New Question

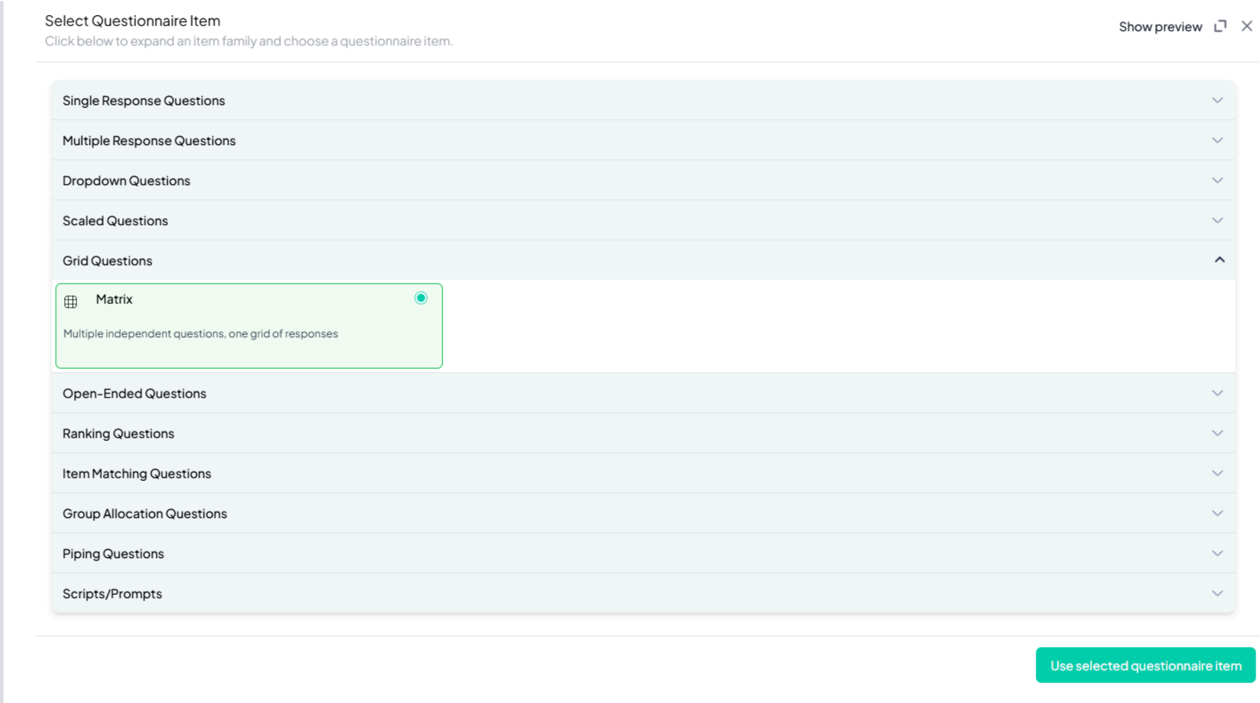
To begin creating a Matrix Question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.

3. Click on the **Create a New Question** button.

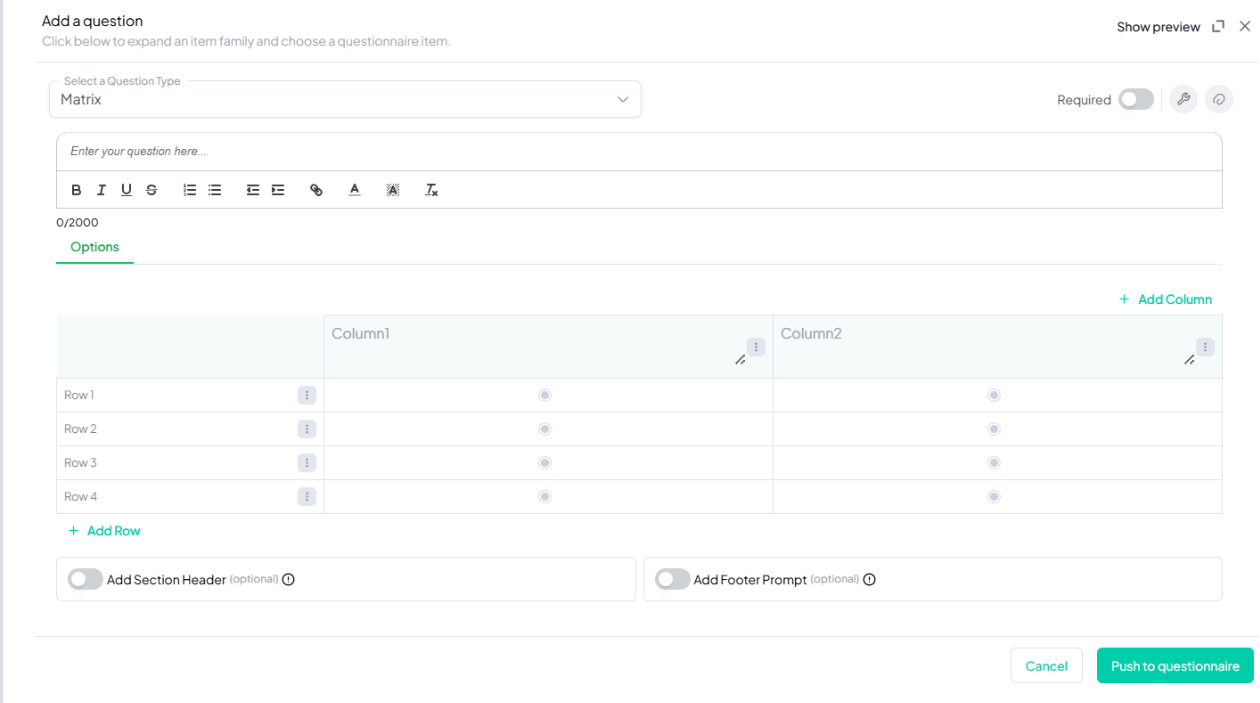
Step 2: Select the Question Type

1. In the question type section, select **Grid Questions.**
2. Choose **Matrix.**
3. Click **Use selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the Matrix question type, you will be prompted to add your question. Enter your question in the provided text box.
   Example: *Please indicate the extent to which you agree or disagree with the following statements about the philosophy of 'YOLO' (You Only Live Once).*
2. Apply formatting using the toolbar.



Step 4: Add the responses

1. Type each row item.
2. Assign a unique label to each row.
3. Define Column Headers
4. Input the set of fixed response options.

Step 5: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here's how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).

3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, “View the media below, then answer the following question.”

Preview Mode

Before finalizing the Matrix question setup, it’s important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Matrix setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

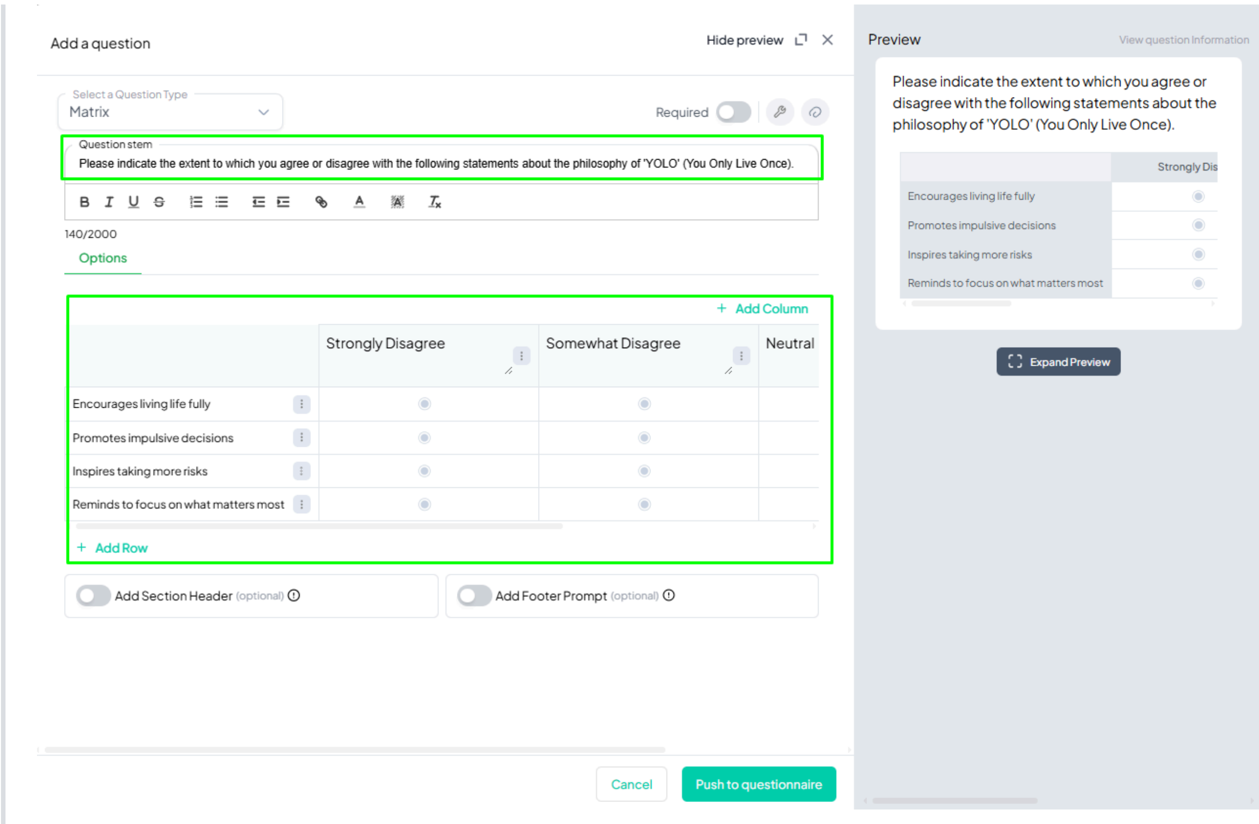
> **Question:** Please indicate the extent to which you agree or disagree with the following statements about the philosophy of 'YOLO' (You Only Live Once).
>
> | Statement | Strongly Disagree | Somewhat Disagree | Neutral | Somewhat Agree | Stron Agr |
> |---|---|---|---|---|---|
> | Encourages living life | ☐ | ☐ | ☐ | ☐ | ☐ |

Statement	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Stron Agr
fully					
Promotes impulsive decisions	☐	☐	☐	☐	☐
Inspires taking more risks	☐	☐	☐	☐	☐
Reminds to focus on what matters most	☐	☐	☐	☐	☐

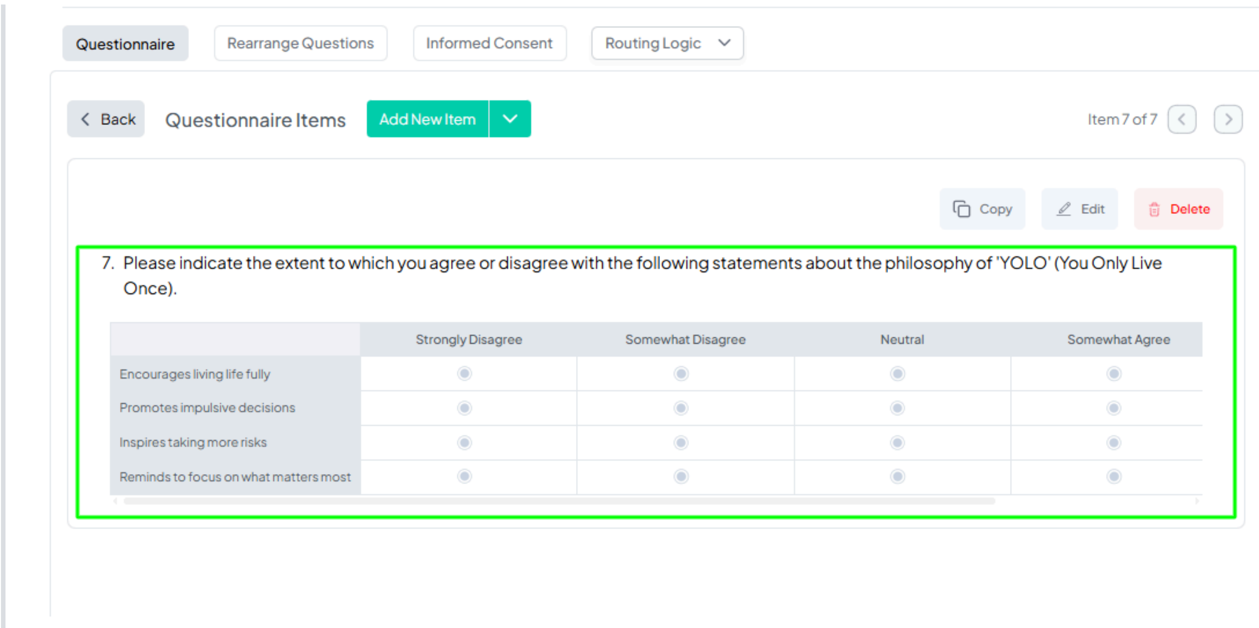
Configuration Settings:

- **Response Type:** Radio Buttons (Single response per row)
- **Row Limit:** 4 items
- **Column Limit:** 5 response options
- **Required:** No
- **Media Attached:** No
- **Section Header & Footer Prompt:** Optional

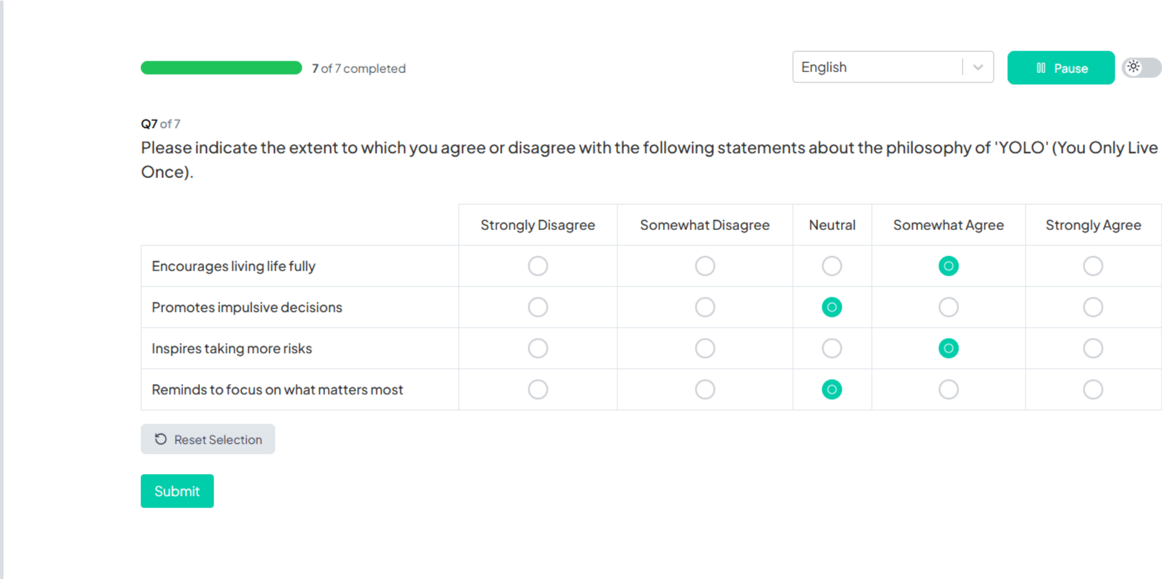
Matrix Question Added



Matrix Question Pushed Preview



Matrix Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares makes Matrix questions both flexible and powerful with a wide range of configuration options that enhance both usability and data integrity.

Key platform-specific advantages include:

- **Dynamic Grid Configuration**: Add up to 12 rows and 9 columns, each row acting as an independent data variable.
- **Custom Row & Column Labels**: Assign descriptive titles and unique labels to each row and column for streamlined analysis.
- **Response Selection Modes**: Choose between radio buttons (single response per row) or checkboxes (multiple responses per row) for added flexibility.
- **Multimedia Integration**: Add supporting images, audio, or video to increase engagement or clarify questions.
- **Required Toggle**: Ensure data completeness by making matrix responses mandatory.

- **Consistent Data Structuring**: Each row's response is tracked as a separate field, ideal for clean exports and statistical analysis.
- **Preview Functionality**: View how the matrix will appear to participants before publishing.

Chisquares empowers users to create **compact, data-rich questions** that maintain respondent engagement and support scalable data collection in a professional format.

Conclusion

The Matrix question type on Chisquares is a powerful tool for gathering structured responses efficiently. By offering customizable rows, column limits, multimedia integration, and multiple response selection options, researchers can create effective and data-rich surveys.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / SINGLE-VALUE RESPONSE

Introduction

The Single-Value Response question type on the Chisquares platform is designed to collect a singular, specific response from participants. Ideal for gathering open-ended input such as names, ID numbers, age, short descriptions, or custom user-generated text, this question format supports a wide range of configurations for response validation and formatting.
This documentation provides a complete overview of how to use the Single-Value Response feature, including configuration options, input validation, and custom formatting, to ensure accurate and structured data collection.

Features of Single-Value Response in Chisquares

- **Question Text Input:** Create and format the core question prompt.
- **Response Options:** Define selectable answers manually or dynamically.

- **Required Toggle:** Make the question mandatory to proceed.
- **Media Attachments:** Support for audio, image, or video file uploads.
- **Configurable Input Type:** Choose from standard text, numbers, dates, or formatted text.
- **Input Validation:** Enforce character limits and data types to control input quality.

Use Cases

The **Single-Value Response Question** type is ideal for capturing precise, one-time entries from participants, such as text, numbers, emails, or identifiers. It is particularly useful when collecting **structured, validated input** in short format—ideal for both administrative and analytical needs.

Common use cases include:

- **Demographic Input**: Gather factual data such as age, zip code, or email address.
  Example: "Please enter your age."

- **Identity Fields**: Collect names, employee IDs, registration numbers, or usernames.
  Example: "Enter your participant ID."

- **Numeric Input**: Capture data like age, ratings, scores, measurements, or financial figures.
  Example: "What is your monthly household income?"

- **Formatted Entries**: Accept values in specific formats such as email, phone number, IP address, or URL.
  Example: "Enter your email address."

- **Short Free-Text Feedback**: Capture personal impressions, phrases, or associations.
  Example: “What is the first word that comes to mind when you think of ‘YOLO’?”

- **Form Submissions**: Use as part of registration forms, intake flows, or one-off survey fields.
  Example: “Enter your preferred display name.”

When to Use Single-Value Response Questions

Use Single-Value Response Questions when:

- You need **a single, clear, and validated entry** from the respondent.
- Data **must follow specific rules or formatting**, such as numbers only, valid email, or strong password.
- Responses must be **quantitative, short, and cleanly structured**.
- Input must be **restricted by length, data type, or custom pattern matching**.
- The response will be stored as a **discrete variable for precise analysis** or identification.

Scenario-Based Example
In a **customer onboarding form**, you might ask:

> *"What is your current monthly income (in USD)?"*
> **Input Type:** Numeric (open text entry)

This allows for precise, validated numeric input and supports income-based segmentation for eligibility or personalization.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Label the Question

- Add a label to help identify the question within your survey. Alternatively, you can use AI to get suggestions for the label.

3. Select Input Type

- Default input is Sample Text box. You can configure the input to accept specific types of data like numbers, phone number or email.

4. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

5. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Advanced Features

1. Min/Max Characters

- Define the acceptable length of the response.

2. Data Type Validation

- Limit input to alphabets, numerals, or custom patterns.

3. Input Required Toggle

- Make this specific input mandatory even if the question itself isn't marked as required.

Step-by-Step Guide

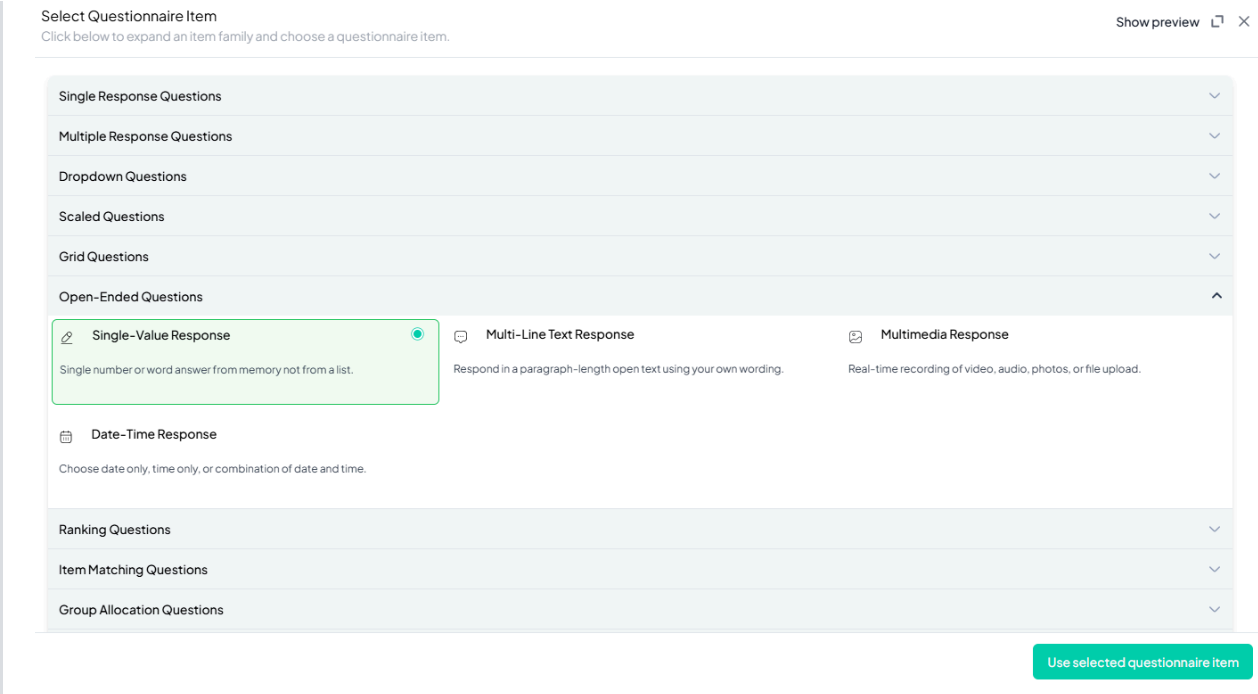
Step 1: Create a New Question

To begin creating a Single-Value Response question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

Step 2: Select the Question Type

1. In the question type section, select **Open-ended Questions.**
2. Choose **Single-Value Response** from the list of available question types.
3. Click **Use Selected questionnaire item.**

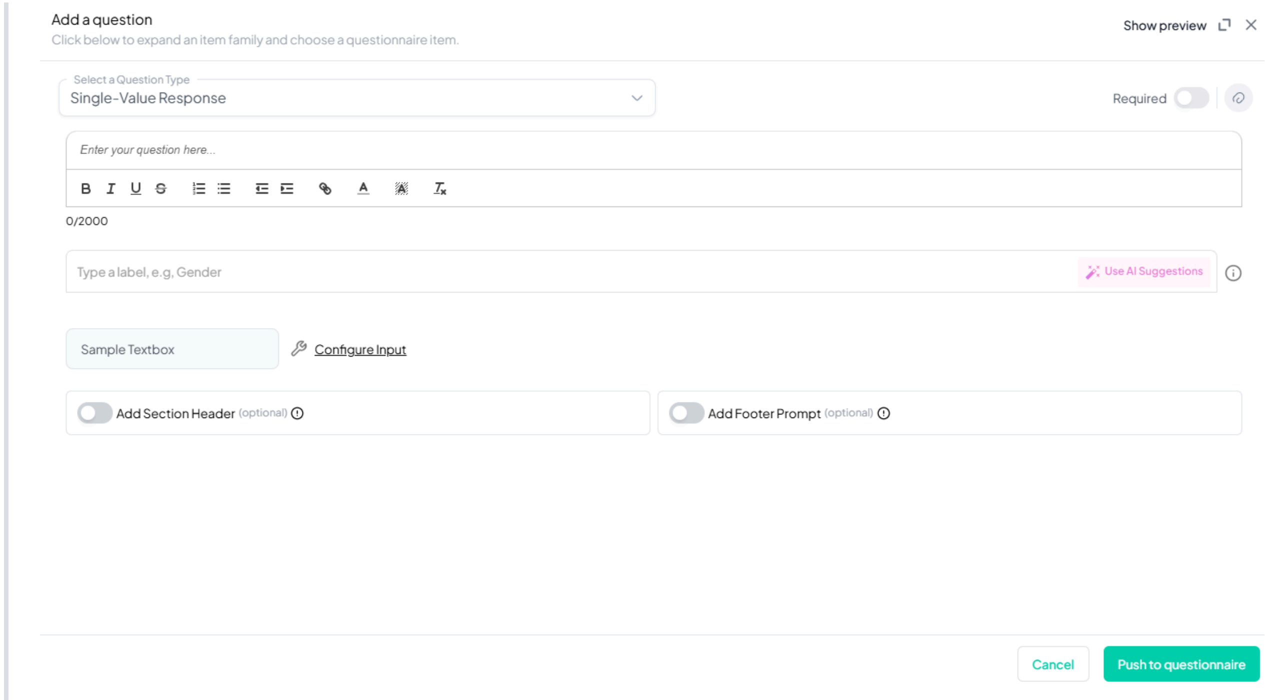


Step 3: Add Your Question

1. After selecting the Single-Value Response type question, you will be prompted to add your question. Enter your question in the provided text box.
   Example: *Provide a single-word or number to answer the following question: What is the first word or phrase that comes to your mind when you think of the philosophy "YOLO" (You Only Live Once)?*

2. Apply formatting using the toolbar.

3. You must also add a label to help identify the question within your survey.



Step 4: Configure the Input Field

1. Click **Configure Input.**
2. Choose the Response Type:
    - Text
    - Number
    - Email
    - Phone Number
3. Set maximum and minimum character count
4. Set validation rules:Allow/disallow specific character types.
5. Toggle **Make this option required** if the field should be compulsory.
6. Click **Apply.**

Step 5: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)
You can upload media (images, videos, or audio files) to accompany the question. Here's how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, "View the media below, then answer the following question."

Preview Mode

Before finalizing the Single-Value Response question setup, it's important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Single-Value Response setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

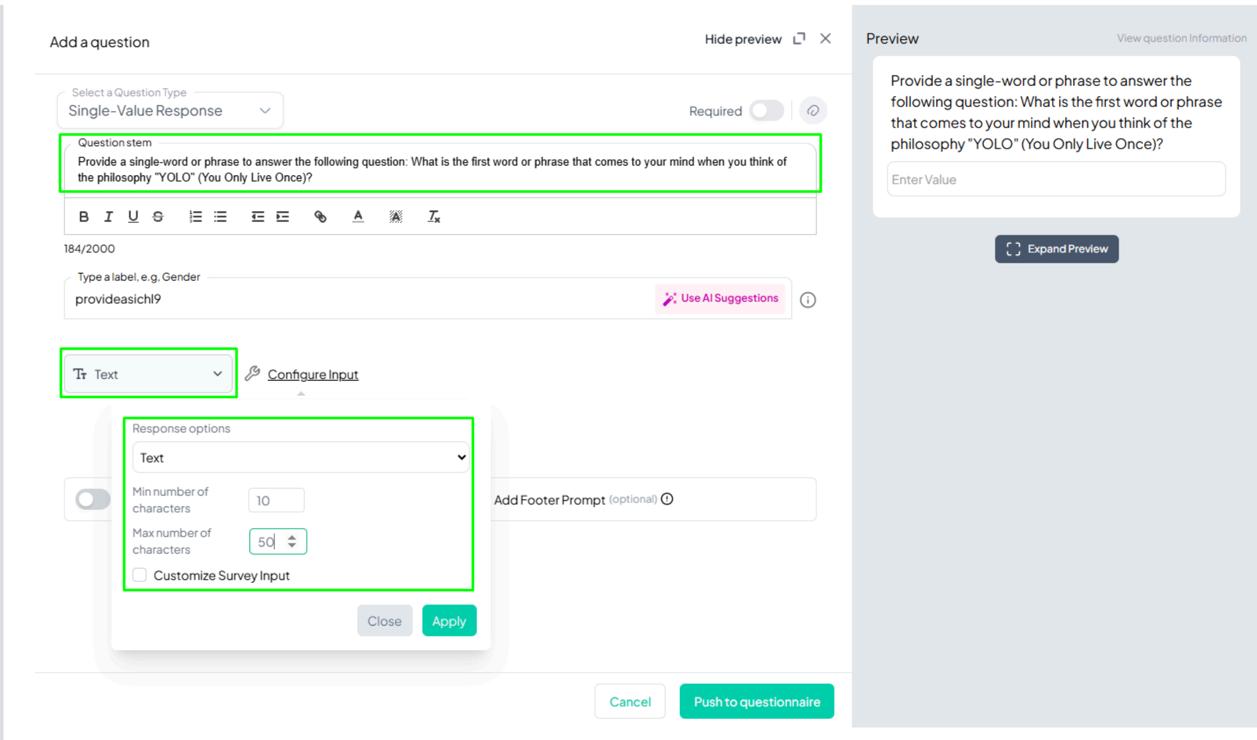
> **Question:** >*Provide a single-word or phrase to answer the following question: What is the first word or phrase that comes to your mind when you think of the philosophy "YOLO" (You Only Live Once)?*

> ### Input Setting:
>
> - **Input Type:** Text

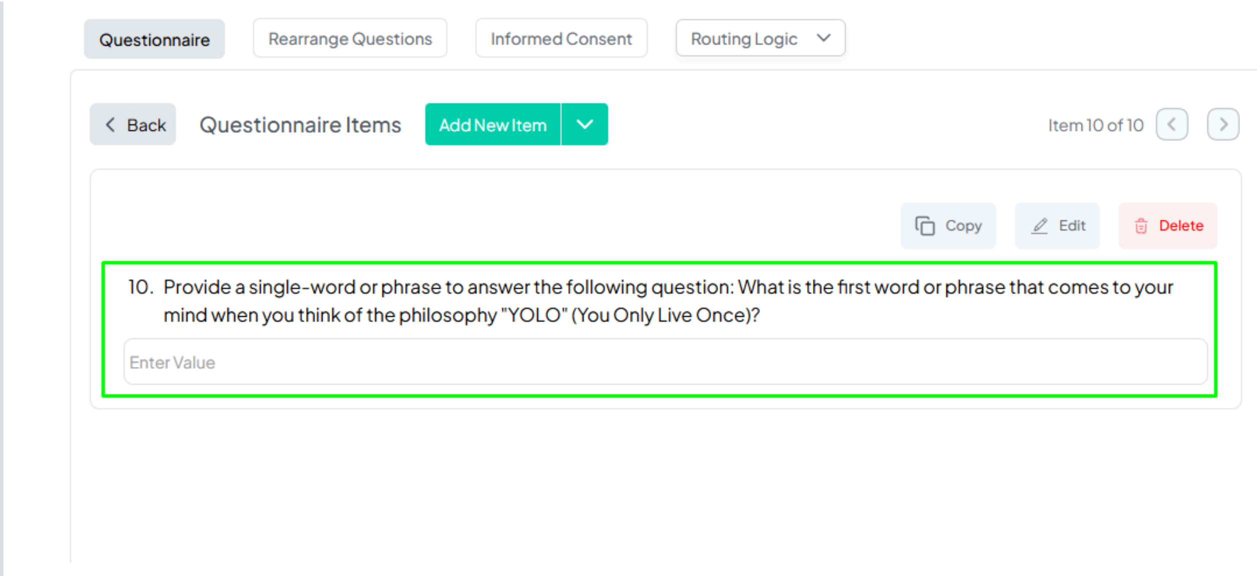
Additional Settings:

- **Min characters:** 10
- **Max characters:** 50
- **Validation:** Letters
- **Required:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

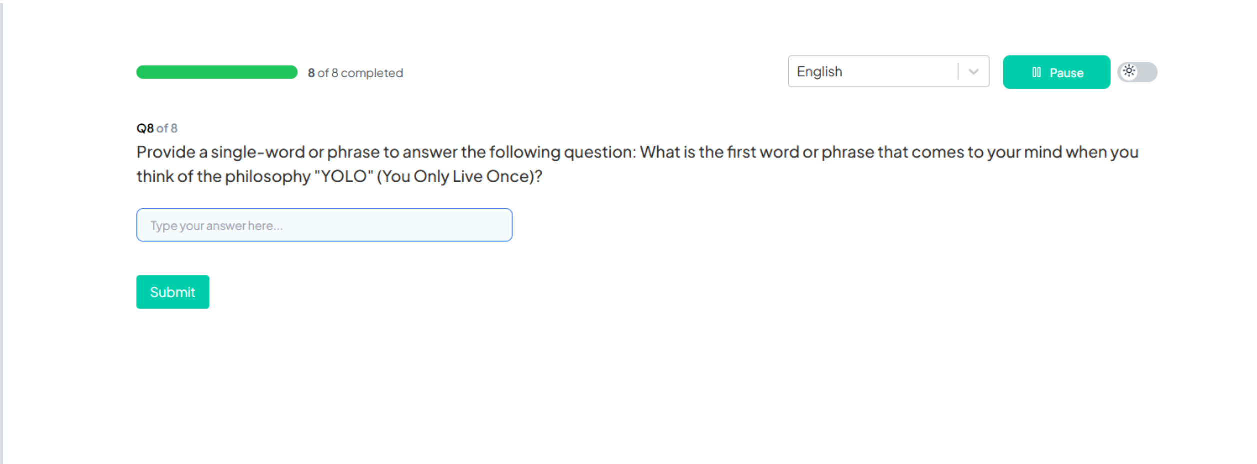
Single-Value Response Question Added



Single-Value Response Question Pushed Preview



Single-Value Response Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares offers a powerful, validation-driven environment for collecting clean, structured data through Single-Value Response fields. From text to numerical input, the platform provides complete control over what and how users can enter information.

Key platform-specific advantages include:

- **Flexible Input Types**
  Configure the input field to accept:
  - Standard **Text**
  - **Numbers**
  - **Email**
  - **International Phone Number**
  - **Float/Decimal**
  - **URL**
  - **IP Address**
  - **Strong Password** (uppercase, lowercase, numbers, special characters)
- **Regex & Custom Validation Rules**
  Users can define custom **Regular Expressions (RegEx)** or select from prebuilt validation patterns.
- **Allowed Special Characters**
  Input fields can support or restrict characters including:
  - **Letters (a–z, A–Z)**
  - **Numbers (0–9)**
  - **Currency Symbols**: $, €, £, ¥
  - **Punctuation & Operators**: %, &, ^, -, _, +, /, ~, @, #, =, |, ., ,, ?, !, *, ', :, ;
  - **Brackets**: (), [], {}, <>
  - **Whitespace/Spaces**

- **Numeric Field Enhancements**
  - Set **minimum and maximum values**
  - Enable **decimal entries**
  - Attach **units of measurement** (e.g., cm, kg, USD, %, hours)
- **Character Limits**
  Define both **minimum and maximum character count** for tighter control over input length.
- **Required Toggle & Field-Specific Validation**
  Make the input field mandatory independently of the full question being required.
- **Media Attachments**
  Add supporting visuals or media files (images, audio, video) to clarify prompts.
- **Clean Data Output & Labeling**
  Automatically generate variable labels using AI for efficient data processing and export to CSV/Excel/API.

Conclusion

The Single-Value Response question type on Chisquares is a powerful and flexible tool for collecting precise, structured data. With its robust input configuration, real-time validation, and optional formatting enhancements, it ensures data accuracy while offering a smooth respondent experience. Whether collecting a single word, a unique ID, or a short free-text entry, this question type is essential for forms, registration flows, and targeted data collection.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / MULTI-LINE TEXT RESPONSE

Introduction

The Multi-line Text Response Question type in Chisquares allows respondents to provide open-ended answers without predefined response options. This question type is ideal for collecting detailed feedback, opinions, and qualitative data where structured choices may not be sufficient.

This manual will guide you through setting up and managing Multi-line Text Response Questions, including using optional features to enhance data collection and improve the participant experience.

Features

- **Unlimited Text Input:** Respondents can enter detailed, free-form responses.

- **Character Limit Control:** Set a maximum character limit to manage response length.
- **Mandatory Response Option:** Require respondents to answer before proceeding.
- **Media Attachments:** Add images, videos, or audio files to accompany the question.

Use Cases

The **Multi-line Text Response Question** is ideal for capturing rich, detailed, and unstructured input from participants. It is particularly well-suited for qualitative feedback where predefined options are insufficient or may limit participant expression.

Common use cases include:

- **Exploratory Research**: Understand complex attitudes, experiences, or behaviors through narrative input.
  Example: "Describe your personal motivations for pursuing entrepreneurship."

- **Customer Feedback**: Collect in-depth suggestions, complaints, or praise directly from users.
  Example: "What could we do to improve your overall experience with our product?"

- **Experience Sharing**: Gather subjective accounts or stories related to specific topics.
  Example: "How has the 'YOLO' philosophy influenced your approach to life and decision-making?"

- **Reflection-Based Questions**: Use in learning assessments, evaluations, or wellness check-ins.

Example: "Reflect on a moment where you took a risk that changed your life."

When to Use Multi-line Text Response Questions

Use Multi-line Text Response Questions when:

- You want **unstructured, open-ended feedback** that reveals deeper meaning or context.
- The question prompts **personal reflection, storytelling, or elaborate justification**.
- You're collecting **qualitative data** for thematic, content, or sentiment analysis.
- Predefined choices would **oversimplify participant perspectives** or limit expression.
- You aim to **capture participant voice** in their own words—essential in research, UX studies, or policy evaluation.

Scenario-Based Example
In a **post-event feedback survey**, you might ask:

> *"Please describe the most valuable lesson you learned during the entrepreneurship bootcamp and how you plan to apply it in your business or studies."*

This provides rich qualitative insight that helps organizers evaluate educational impact.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Label the Question

- Add a label to help identify the question within your survey. Alternatively, you can use AI to get suggestions for the label.

3. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

4. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Step-by-Step Guide

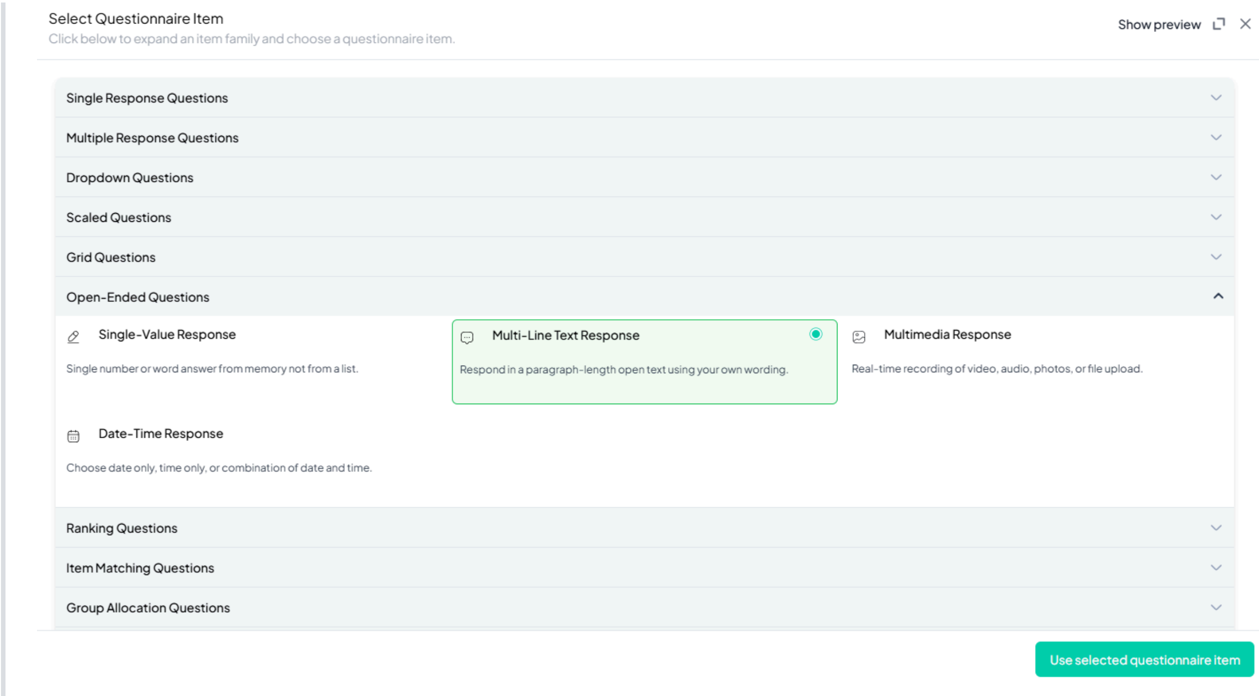
Step 1: Create a New Question

To begin creating a Multi-Line Text Response question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

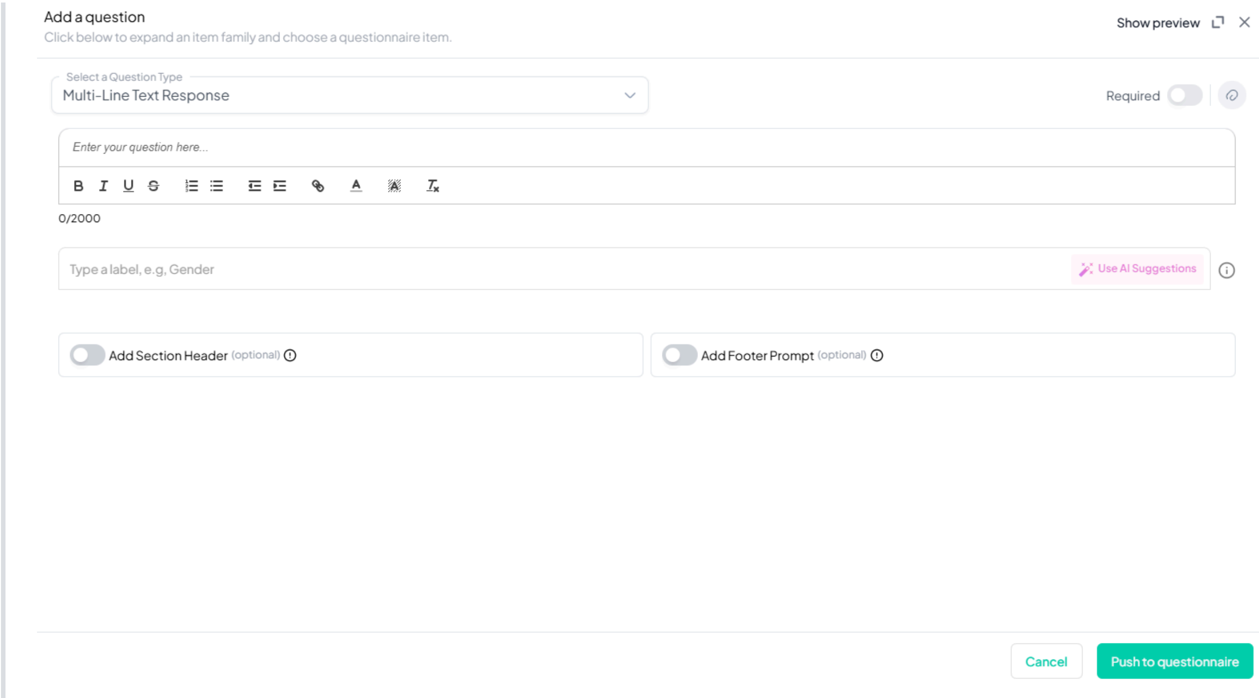
Step 2: Select the Question Type

1. In the question type section, select **Open-ended Questions.**
2. Choose **Multi-Line Text Response** from the list of available question types.
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the MCQ type, you will be prompted to add your question. Enter your question in the provided text box.
   Example: *Please write a detailed response to the following question: How has the "YOLO" philosophy influenced your life choices or outlook on taking risks? (Feel free to write as much as you need to express your thoughts.)*
2. Apply formatting using the toolbar.
3. You must also add a label to help identify the question within your survey.



Step 4: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 5: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here’s how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, “View the media below, then answer the following question.”

Preview Mode

Before finalizing the Multi-Line Text Response question, it’s important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Multi-Line Text Response setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

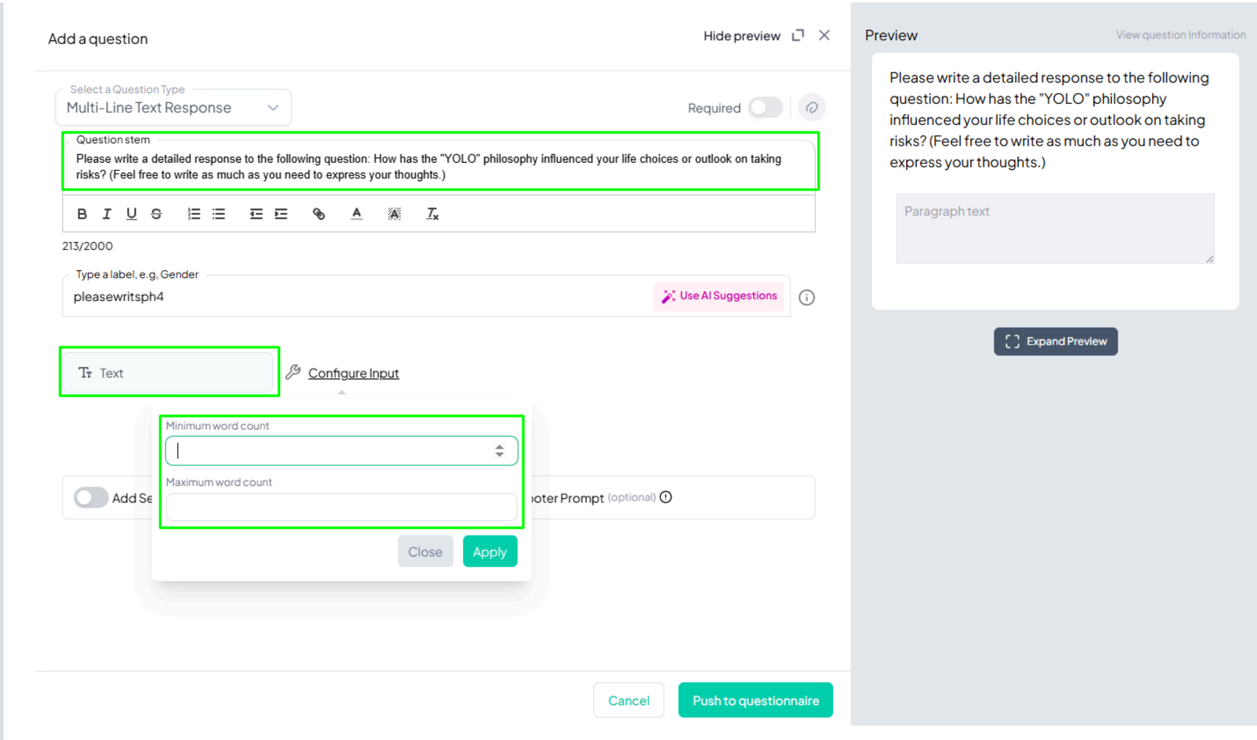
Example Question Setup

> **Question:** *Please write a detailed response to the following question: How has the "YOLO" philosophy influenced your life choices or outlook on taking risks? (Feel free to write as much as you need to express your thoughts.)*

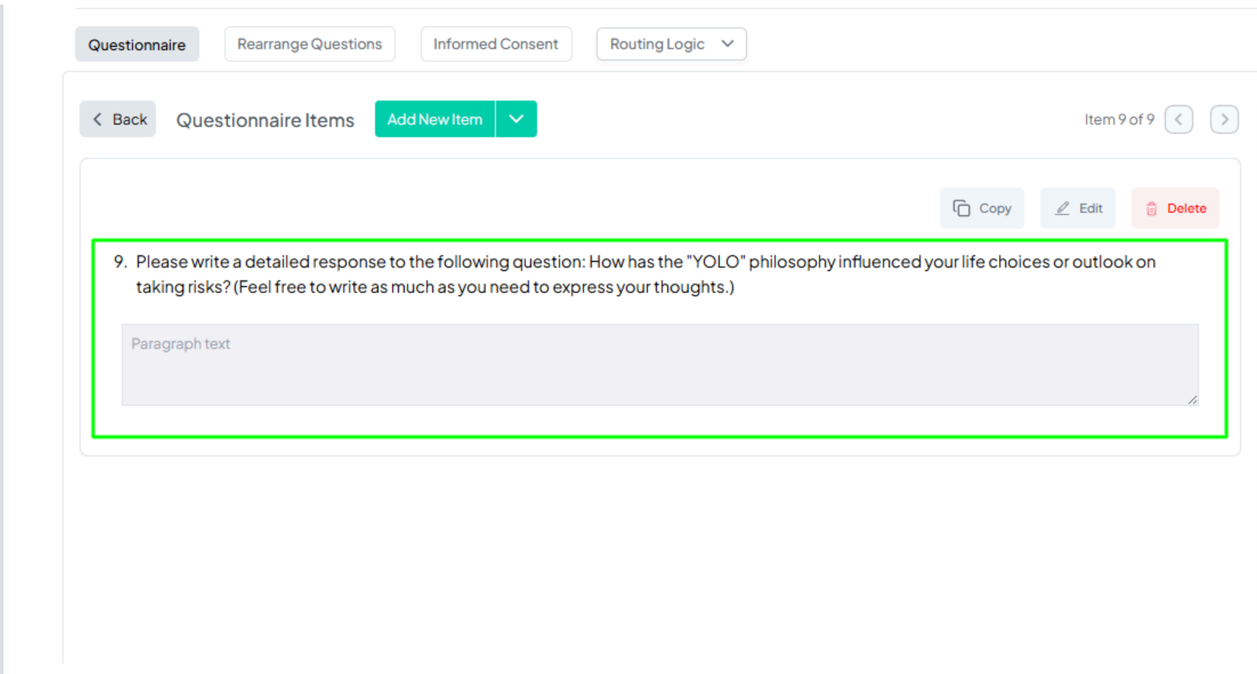
Additional Features:

- **Required:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

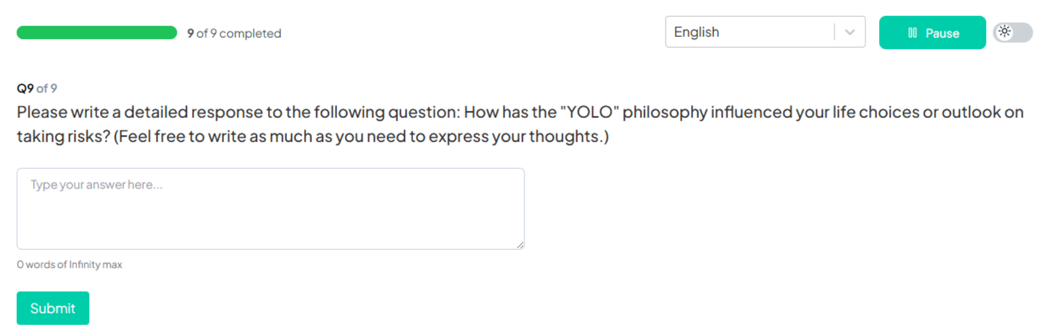
Multi-line Text Response Question Added



Multi-line Text Response Question Pushed Preview



Multi-line Text Response Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares equips users with a highly adaptable Multi-line Text Response tool that balances freedom of expression with administrative control, ensuring high-quality qualitative data collection.

Key platform-specific advantages include:

- **Unlimited Text Input**
  Respondents can write as much as they need—ideal for narrative data.
- **Character Limit Control**
  Optionally restrict responses with a **maximum character count** to keep inputs concise and focused.
- **Mandatory Response Toggle**
  Mark the question as required to ensure participant input is captured.
- **Media Attachments**
  Embed supporting visuals, audio, or video to guide responses or provide context.

- **AI-Powered Labeling**
  Generate meaningful variable names for more efficient analysis and survey management.

- **Preview Functionality**
  View the exact participant experience before finalizing and publishing your survey.

- **Structured Export Options**
  Open-text responses are stored cleanly and ready for export to tools used in coding, text mining, or qualitative analysis (e.g., NVivo, Excel).

Whether you're capturing stories, reflections, or feedback, this question type supports **open dialogue and narrative richness**.

Conclusion

The Multi-line Text Response feature on Chisquares is a powerful tool for collecting rich qualitative insights from survey participants. Whether used for customer feedback, research, or exploratory questions, this question type ensures flexibility and depth in data collection.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / Multimedia

Introduction

Multimedia Response Questions on the Chisquares platform allow respondents to capture and upload images, videos, or audio files as part of their survey response. This feature enhances data collection by incorporating real-time visual and audio elements, making it ideal for research that requires user-generated content.
This manual provides a comprehensive guide on setting up and managing Multimedia Response Questions, including basic setup, advanced features, and best practices.

Features of Multimedia Response Questions

- **File Upload Options:** Supports image, video, and audio file uploads.
- **Real-Time Capture:** Allows respondents to record or capture media directly within the survey.
- **Mandatory Response Setting:** Option to require respondents to submit a multimedia file before proceeding.

- **File Size and Format Restrictions:** Define acceptable formats and file size limits.
- **Preview Functionality:** Enables respondents to review their uploaded media before submission.
- **Metadata Collection:** Collect additional details such as file timestamps, geolocation (if enabled), and device type.

Use Cases

The **Multimedia Response Question** type is ideal for collecting audio, video, image, or document-based feedback directly from respondents. It allows users to go beyond text and capture **real-world, user-generated content**—making it especially valuable in research, validation, storytelling, and field studies.

Common use cases include:

- **Participant Testimonials**: Gather personal video or audio messages.
  Example: "Please record a short message describing your experience using our app."

- **Field-Based Research**: Collect images or audio from remote locations.
  Example: "Upload a photo of your study environment or worksite."

- **Creative Submissions**: Allow users to submit design files, sketches, or demo reels.
  Example: "Upload your project presentation or video pitch."

- **Voice of the Customer**: Capture unfiltered, vocal insights for qualitative analysis.
  Example: "Share an audio clip explaining your favorite product feature."

- **Verification or ID Confirmation**: Upload required documents or identity proof.

Example: “Attach a photo of your government-issued ID.”

When to Use Multimedia Response Questions

Use Multimedia Response Questions when:

- Text-based input is **not sufficient** to capture the full richness or nuance of the data.
- You're gathering **qualitative, expressive, or demonstrative content** (e.g., interviews, observations).
- You want to **enhance engagement** through voice or visual storytelling.
- You require **visual proof or context** for a response (e.g., document scans, real-time uploads).
- You aim to **include accessibility-friendly formats** such as spoken-word entries.

Scenario-Based Example
A university-led social research project is studying the emotional tone of Gen Z social activism. Participants are asked:

> *“Record a short video describing a cause you're passionate about and how you’ve taken action in support of it.”*

This allows researchers to analyze voice tone, facial expression, and message delivery—providing rich contextual data that text alone could not capture.

Basic Setup

1. Question Text

- Define the prompt to instruct respondents on the type of multimedia content required.

2. Response Type

- Choose from image, video, document, or audio as the expected response format.

3. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

4. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Step-by-Step Guide

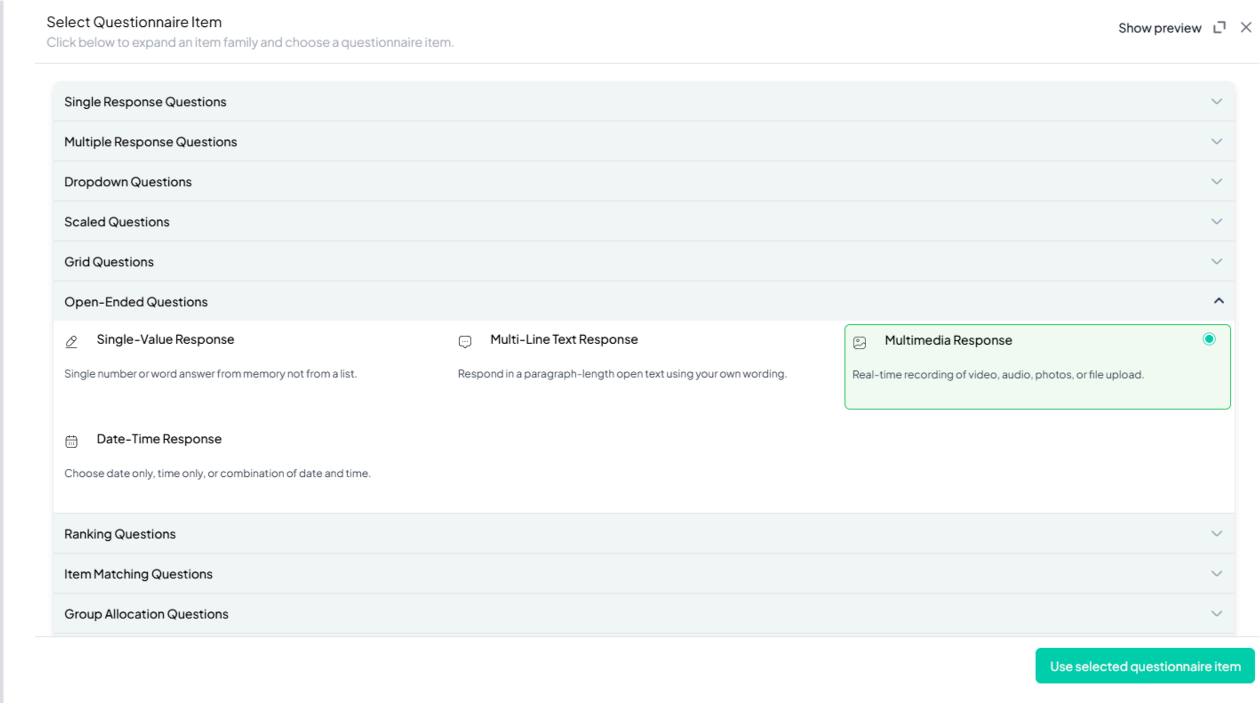
Step 1: Create a New Question

To begin creating a Multimedia Response question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

Step 2: Select the Question Type

1. In the question type section, select **Open-ended Questions.**
2. Choose **Multimedia Response** from the list of available question types.
3. Click **Use Selected questionnaire item.**

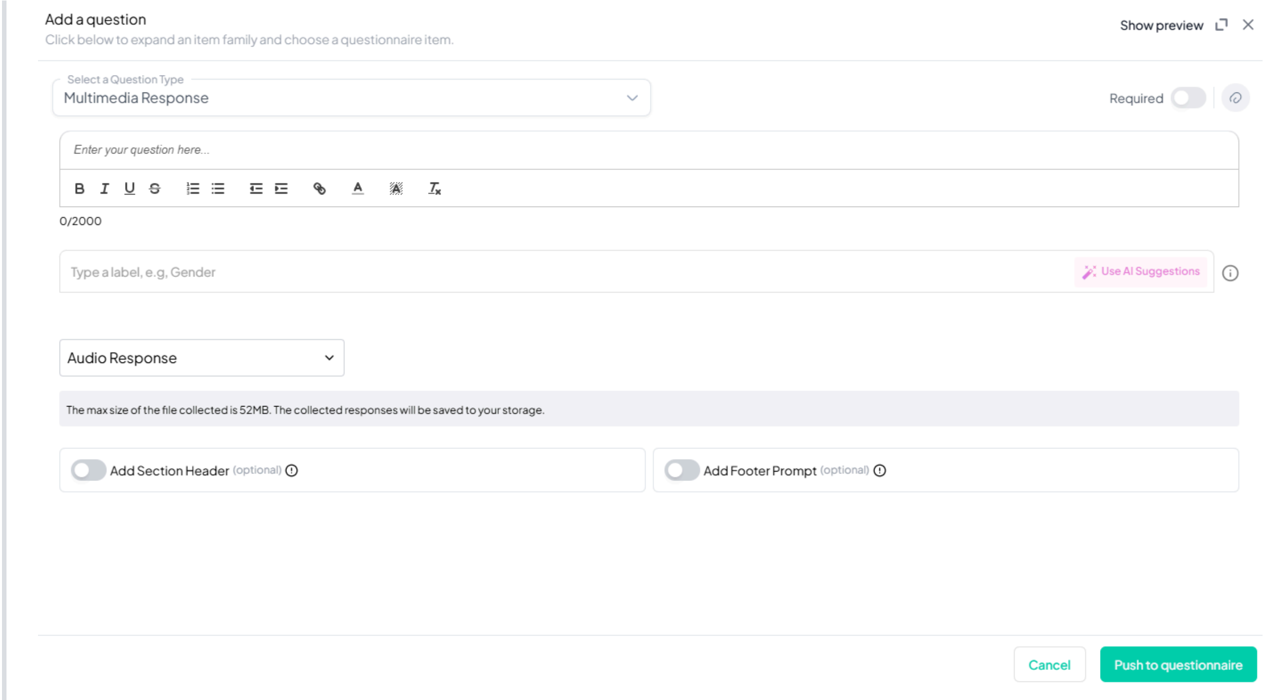


Step 3: Add Your Question

1. After selecting the Multimedia type, you will be prompted to add your question. Enter your question in the provided text box.
   Example:Use the tools below to record or upload a response:
   Can you record a short audio clip sharing your thoughts on how the "YOLO" (You Only Live Once) philosophy has influenced the lives of young people in society?

2. Apply formatting using the toolbar.

3. You must also add a label to help identify the question within your survey.



Step 4: Define Response Settings

1. Select Response Type: Choose from image, video, audio, document (PDF, XSL, CSV, PPT, DOC), or any format.

Step 5: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here’s how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, “View the media below, then answer the following question.”

Preview Mode

Before finalizing the Multimedia Response setup, it’s important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Multimedia Response setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

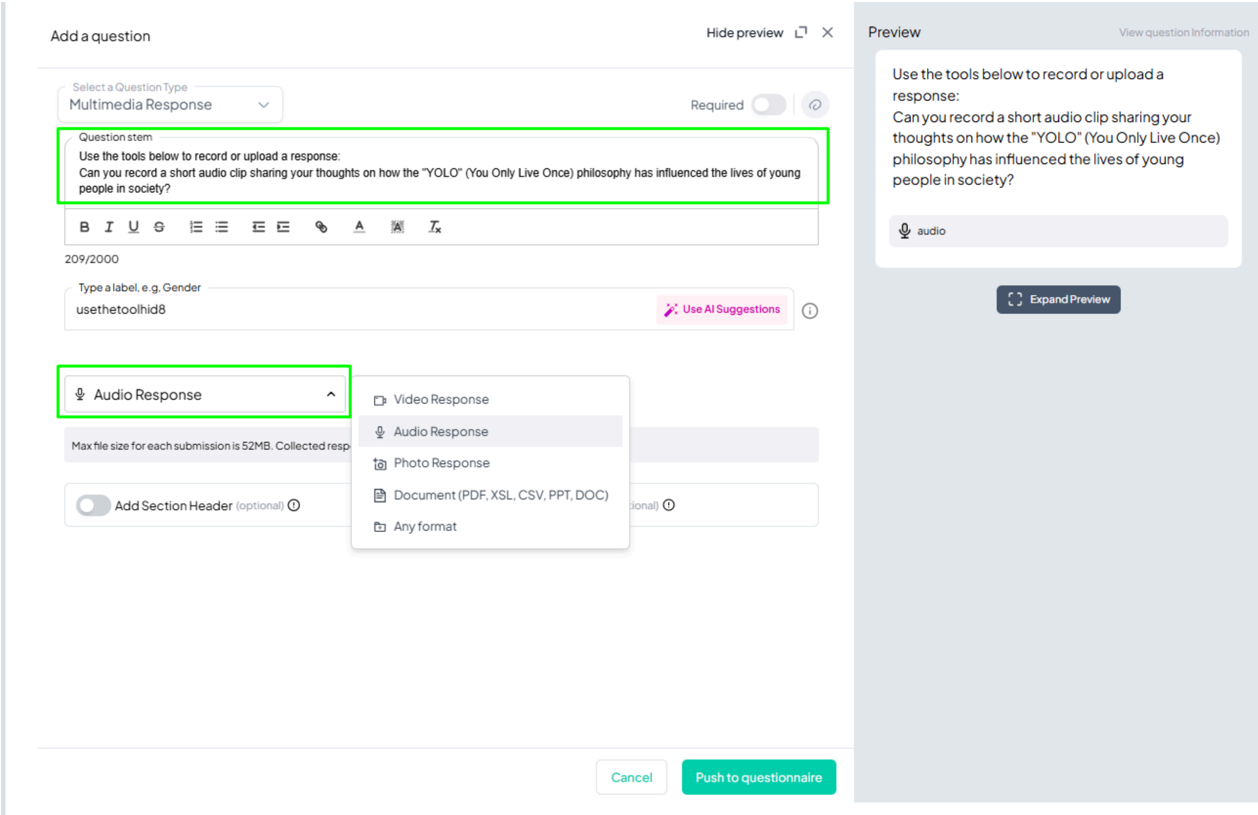
> **Question**
> Use the tools below to record or upload a response:
> *Can you record a short audio clip sharing your thoughts on how the "YOLO" (You Only Live Once) philosophy has influenced the lives of young people in society?*
>
> **Option Setting**
>
> - **Response Type:** Audio (MP3, max 50MB)

Additional Features:

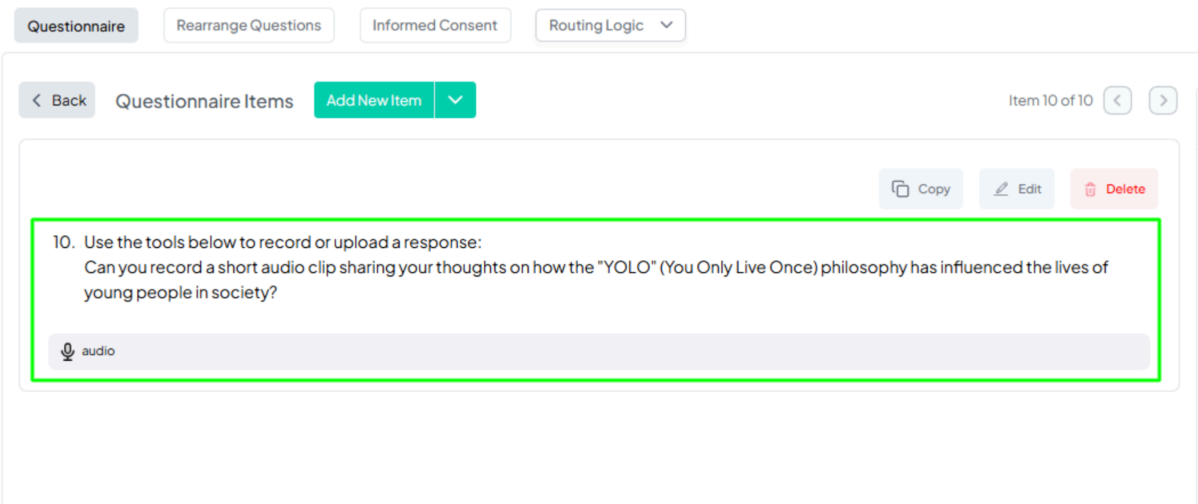
- **Required:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.

- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

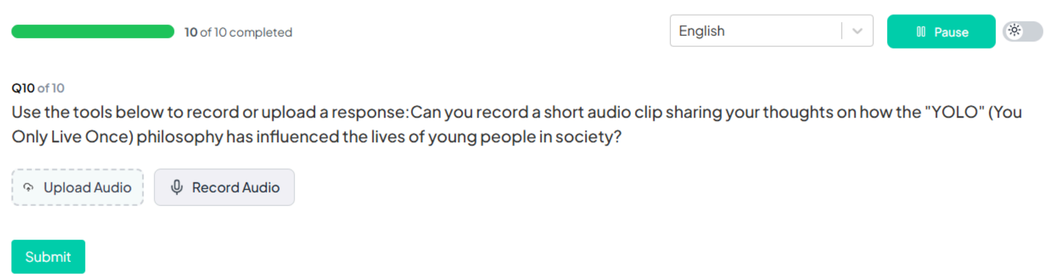
Multimedia Response Question Added



Multimedia Response Question Pushed Preview



Multimedia Response Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares delivers a robust multimedia capture system that blends **user-friendly input methods** with **research-grade configuration options**, empowering researchers, designers, educators, and marketers to collect authentic participant-generated media.

Key platform-specific advantages include:

- **File Type Selection**
  Choose from accepted response formats:
  - **Image** (JPG, PNG, etc.)
  - **Audio** (MP3, WAV)
  - **Video** (MP4, MOV)
  - **Document** (PDF, PPT, DOC, CSV, XLS)
- **Real-Time Media Capture**
  Allow users to **record audio or video directly** in-browser without leaving the survey.
- **Upload & Preview Functionality**
  Participants can **preview their uploaded content** before final submission to confirm accuracy.
- **File Restrictions & Validation**
  Set **maximum file size** and restrict file types to meet project requirements.
- **Metadata Collection**
  Capture supplemental details such as:
  - **File timestamps**
  - **Device/browser type**
  - **Geolocation data** (if enabled)
- **Required Toggle**
  Make the upload **mandatory** for completion of the question.
- **Rich Media Prompts**
  Add example media or supporting visuals to **guide responses** or demonstrate expectations.

- **Clean Export Format**
  Each file is securely stored and indexed with labels and metadata, streamlining downstream analysis.

Conclusion

The Multimedia Response Question type on Chisquares is a powerful tool for collecting rich, user-generated content. Whether you are conducting research, gathering testimonials, or verifying participant responses, this feature enables a more dynamic and interactive data collection process.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / DATE-TIME RESPONSE

Introduction

The Date-Time Response Question in the Chisquares data collection platform allows respondents to specify date, time, or both in their survey responses. With enhanced customization, users can choose their preferred date and time formats and specify their desired time zone. This feature ensures accuracy and flexibility, making it useful for scheduling, event planning, and timestamped data collection.

Features

- **Date, Time, or Both:** Respondents can provide a date-only, time-only, or a full date-time response.
- **Customizable Formats:** Users can select different formats for date and time input.
- **Time Zone Selection:** Respondents can specify their preferred time zone for accuracy.
- **Mandatory Question Setting:** Option to make the response required.

Use Cases

The **Date-Time Response Question** type is designed for capturing time-based input from respondents in a structured and flexible manner. It enables participants to specify a date, a time, or both—making it highly suitable for time-sensitive research, planning, or logging activities.

Common use cases include:

- **Scheduling**: Determine participant availability for interviews, meetings, or workshops.
  Example: "Please select your preferred date and time for the upcoming group session."

- **Event Planning**: Coordinate registrations, attendance windows, or appointment slots.
  Example: "When would you like to attend our orientation seminar?"

- **Deadline Tracking**: Collect input on delivery dates or target completion times.
  Example: "By what date do you plan to complete your submission?"

- **Activity Logging**: Record a date or time tied to an action, milestone, or personal event.
  Example: "Enter the time you typically begin your workday."

- **Multi-Time Availability Polling**: Enable participants to submit recurring availability across a time window.
  Example: "Please indicate all dates you're available for follow-up interviews."

When to Use Date-Time Response Questions

Use Date-Time Response Questions when:

- You require a **timestamped entry**, either a date, a time, or both.
- Scheduling, coordination, or planning is part of your research or service workflow.
- You need **standardized time input** in formats like 24-hour or 12-hour time, or international date formats.
- Respondents are in different time zones and **localized accuracy is crucial**.
- Validation is important (e.g., restricting selection to future dates only).

Scenario-Based Example
In a global stakeholder survey, respondents are asked:

> *"Please select the best date and time for you to attend the working group meeting on 'Youth and Society.'"*
> This allows for precise scheduling while accounting for each respondent's time zone and availability.

Basic Setup

- **Question Text:** Define the prompt for respondents (e.g., "Select your preferred meeting date and time.")
- **Response Type:** Choose whether the respondent should provide a date, time, or both.
- **Format Selection:** Pick the required date and time format.
- **Time Zone Settings:** Enable time zone selection for global participation.
- **Mandatory Option:** Decide if answering this question should be required.
- **Default Values (Optional):** Set a pre-selected date or time to guide respondents.
- **Validation Rules:** Restrict responses to a valid range.

Advanced Features

- **Time Zone Auto-Detection:** Automatically detect respondents' time zones based on location.
- **Min/Max Date & Time:** Define a valid response window (e.g., "Only select dates within the next 30 days").
- **Recurring Date Selection:** Allow respondents to pick multiple dates (e.g., for availability polling).

Step-by-Step Guide

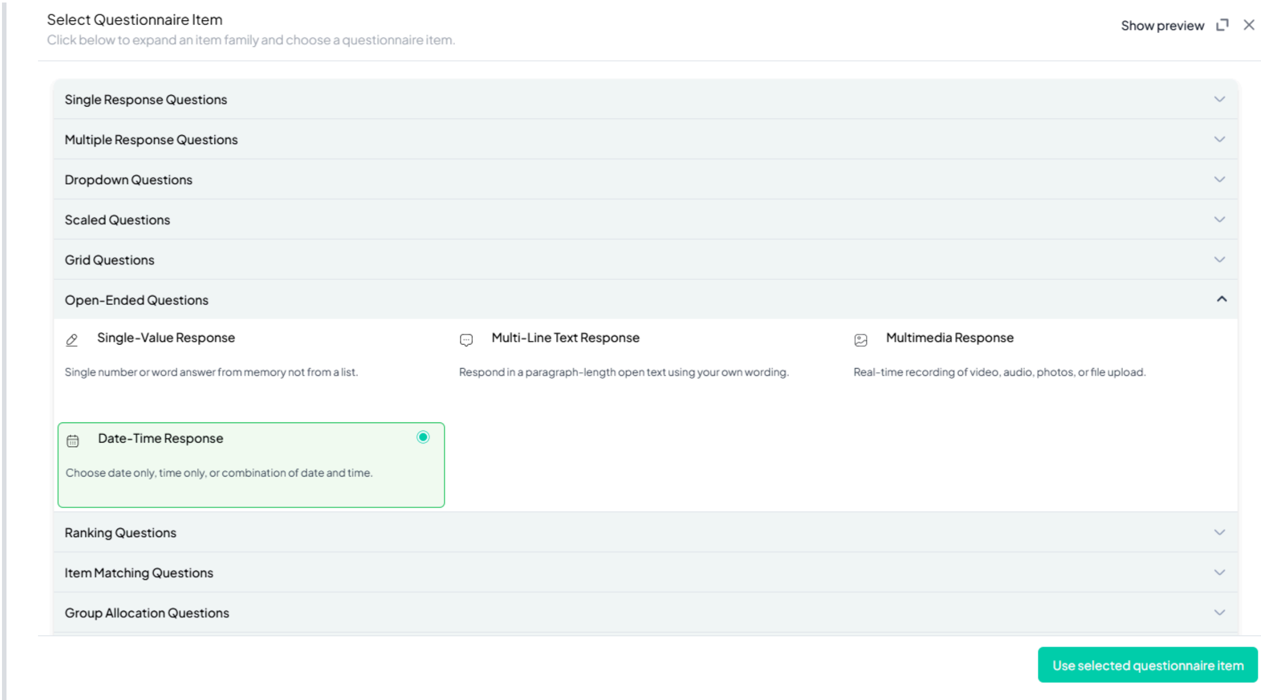
Step 1: Create a New Question

To begin creating a Date-Time Response question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

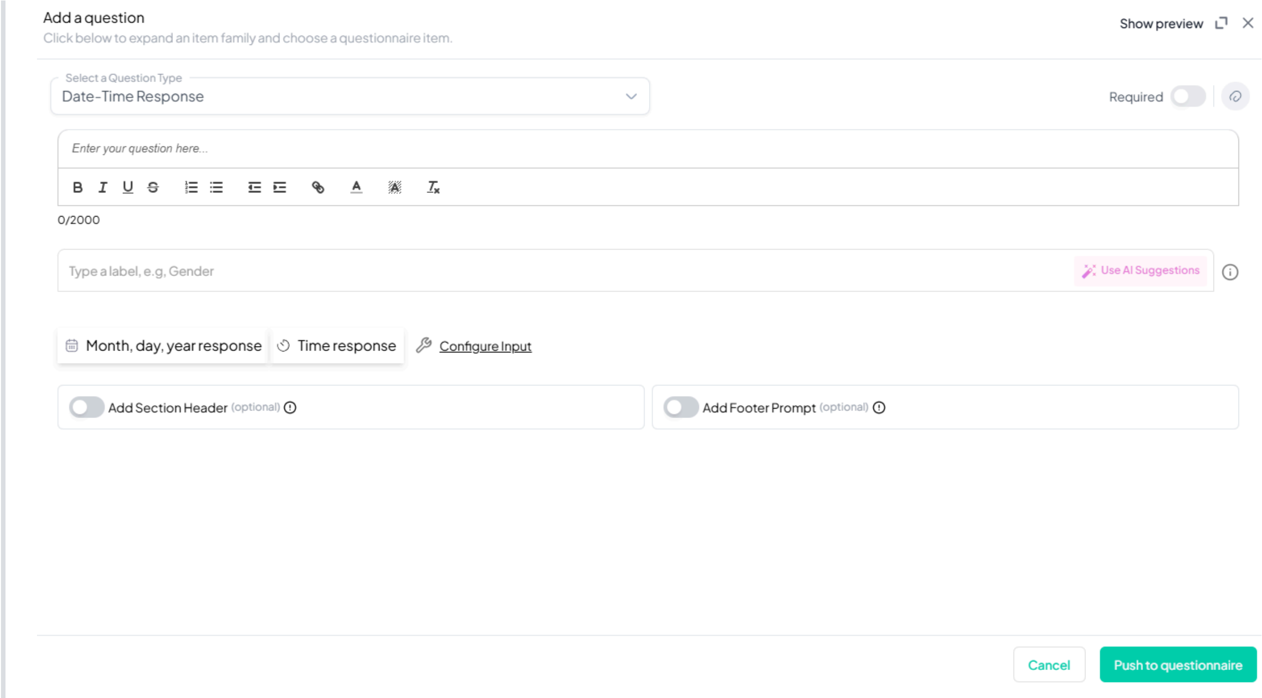
Step 2: Select the Question Type

1. In the question type section, select **Open-ended Questions.**
2. Choose **Date-Time Response** from the list of available question types.
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the Date-Time Response question type, you will be prompted to add your question. Enter your question in the provided text box.
   Example:
   Please select the best date and time for you to attend the working group meeting on "Youth and Society."
2. Apply formatting using the toolbar.
3. You must also add a label to help identify the question within your survey.



Step 4: Define Format & Validation

1. Select the desired date/time format (e.g., MM/DD/YYYY or 24-hour format).
2. Set minimum and maximum values for valid responses.

Step 5: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here's how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, "View the media below, then answer the

following question."

Preview Mode

Before finalizing the Date-Time Response question, it's important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Date-Time Response setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

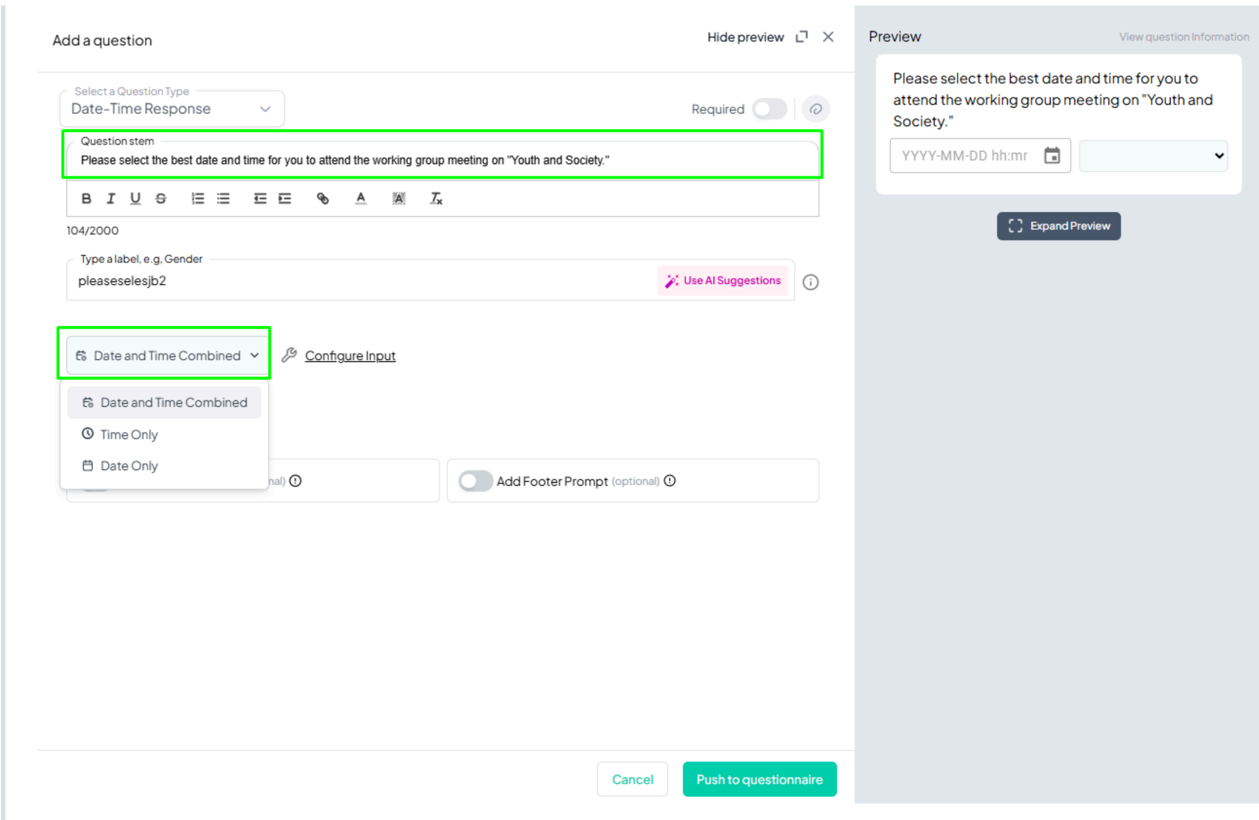
Example Question Setup

> **Question**
> *Please select the best date and time for you to attend the working group meeting on "Youth and Society."*
>
> ### Response Settings:
>
> - **Response Type:** Date & Time
> - **Time Zone Selection:** Enabled
> - **Date Format:** YYYY-MM-DD
> - **Time Format:** 24-hour format

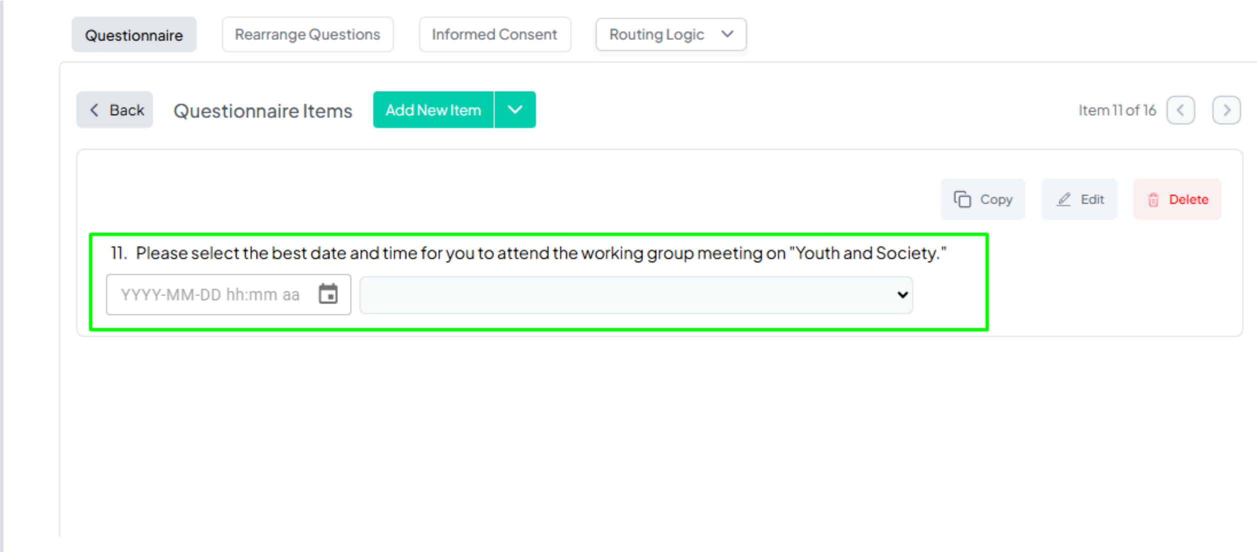
Additional Features:

- **Required:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

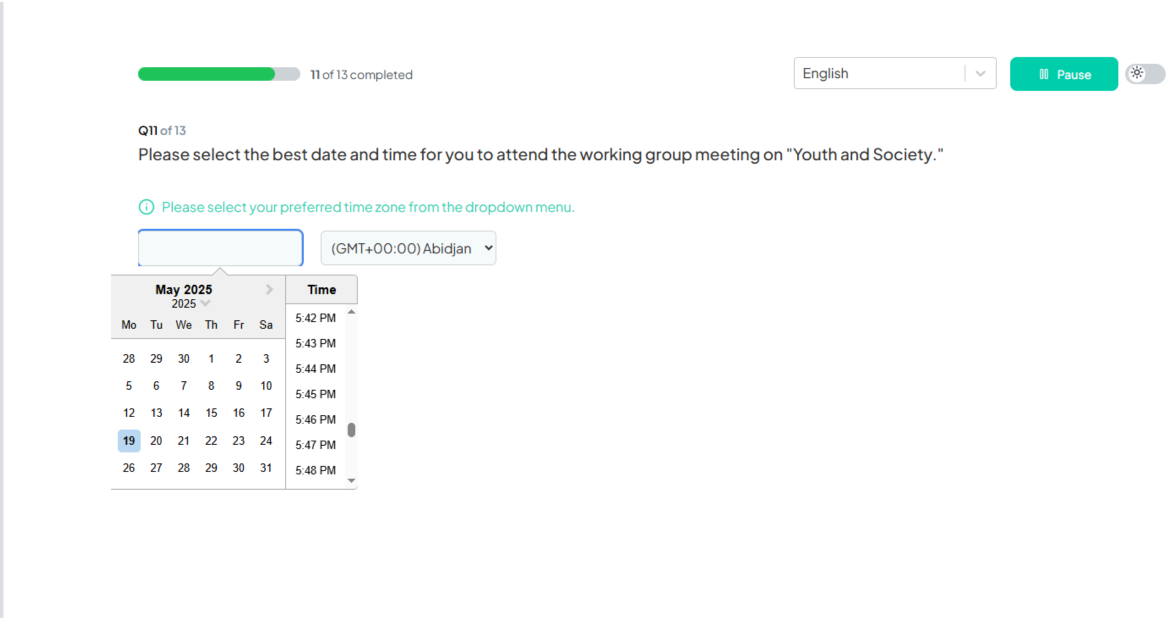
Date-Time Response Question Added



Date-Time Response Question Pushed Preview



Date-Time Response Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares makes it easy to collect and standardize temporal data with **powerful configuration options** and an intuitive participant interface. The platform supports a wide variety of time-sensitive research and operational workflows.

Key platform-specific advantages include:

- **Flexible Input Configuration**
  Choose from:
  - **Date only**
  - **Time only**
  - **Combined Date & Time**
- **Custom Format Selection**
  Support for formats like:
  - **Date**: MM/DD/YYYY, YYYY-MM-DD, DD-MM-YYYY
  - **Time**: 12-hour or 24-hour
- **Time Zone Handling**
  - **Manual Selection**: Let users choose their time zone.
  - **Auto-Detection**: Automatically detect based on IP or device settings.
- **Validation Features**
  - Define **minimum and maximum allowable dates/times** (e.g., only future dates).
  - Prevent invalid entries to **enforce data quality**.
- **Recurring Date Selection**
  Enable multi-date responses for polling availability across time windows.
- **Default Value Setting**
  Provide a preset date or time to reduce input effort or nudge toward

preferred scheduling.

- **Media Integration**
  Add images, audio, or video prompts for enhanced clarity.

- **Required Toggle**
  Ensure participant input before survey continuation.

- **Structured Export Support**
  Capture responses in ISO-standardized formats, ideal for integration with scheduling tools or analysis platforms.

Conclusion

The Date-Time Response Question feature in Chisquares provides flexibility for capturing precise time-based responses. Whether used for scheduling, event planning, or timestamped data collection, this feature ensures accuracy and user convenience.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / SIMPLE RANK ORDERING

Introduction

The Simple Rank Ordering question type allows users to input a list of attributes and rank them in order of preference, importance, or relevance. Chisquares automatically generates a parallel ranking system, ensuring each attribute is assigned a unique position. This feature is ideal for prioritization tasks, decision-making studies, and user preference analysis.
This guide provides step-by-step instructions on setting up and managing Simple Rank Ordering questions on Chisquares, covering both basic and advanced functionalities.

Features of Simple Rank Ordering in Chisquares

- **Question Text Input:** Create and format the core question prompt.
- **Response Options:** Define responses to be ranked.

- **Required Toggle:** Make the question mandatory to proceed.
- **Media Attachments:** Support for audio, image, or video file uploads.
- **Attribute Input:** Users enter a list of items to be ranked.
- **Unique Labeling:** Each attribute receives a unique label.

Use Cases

The **Simple Rank Ordering Question** type is designed to capture respondent preferences, priorities, or judgments by having them rank a list of items in a specific order. This format is ideal for comparative analysis and helps reveal the relative importance of choices.

Common use cases include:

- **Preference Ranking**: Determine which products, features, or services users value most.
  Example: "Rank these mobile phone brands based on your personal preference."

- **Decision-Making Studies**: Understand how respondents prioritize competing factors.
  Example: "Rank the following job benefits from most to least important."

- **Behavioral Research**: Explore attitudes, associations, or tendencies in ranked form.
  Example: "Rank these daily activities by how much time you spend on each."

- **Education & Assessments**: Assess comprehension through ranking-based learning tasks.
  Example: "Rank the following historical events in chronological order."

- **Market Testing**: Evaluate how consumers rate marketing messages, slogans, or design elements.
  Example: "Rank these campaign slogans by effectiveness."

When to Use Simple Rank Ordering Questions

Use Simple Rank Ordering Questions when:

- You need **respondents to assign a unique rank** to each item from a common list.
- It's important to understand the **relative order of importance or preference**, not just selection.
- You want to **limit the selection to a forced-choice format** where every item is distinctly positioned.
- Your research focuses on **priority, impact, or sequence-based analysis**.
- You aim to **compare item positioning across participants or segments**.

Scenario-Based Example
In a cultural literacy study, participants are asked:

> *"Please rank the following Latin statements by character count, with 1 being the shortest and 5 the longest."*
> This captures not only familiarity with content but also visual interpretation and attention to detail.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Add Answer Options

- Manually input up to 2 default options and add more by clicking More. Provide a unique label for each option.

3. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

4. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Step-by-Step Guide

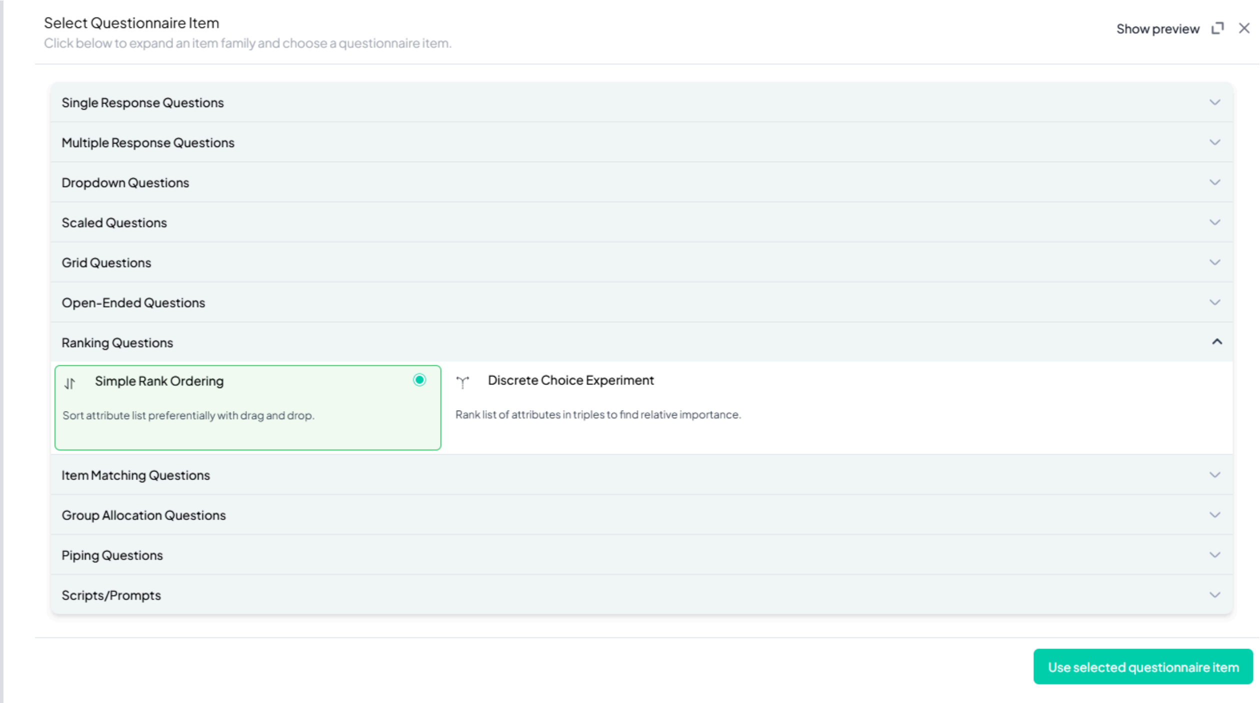
Step 1: Create a New Question

To begin creating a Simple Rank Ordering question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

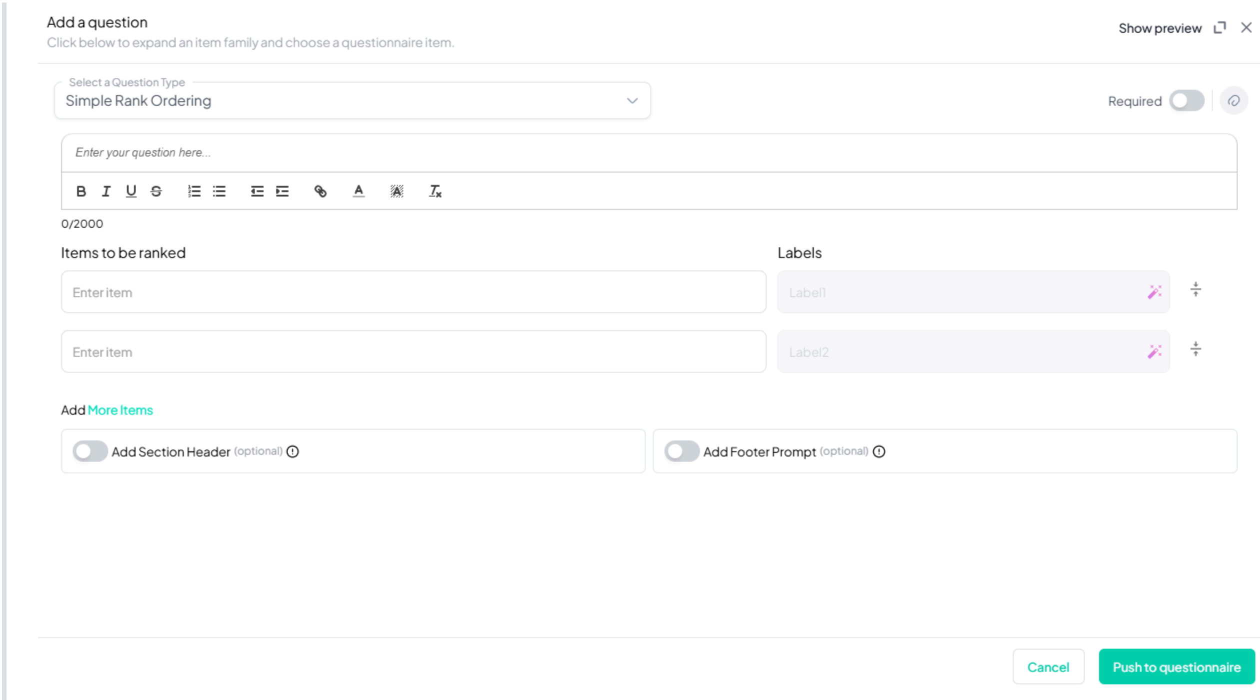
Step 2: Select the Question Type

1. In the question type section, select **Ranking Questions.**
2. Choose **Simple Rank Ordering** from the list of available question types.
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the Simple Rank Ordering type, you will be prompted to add your question. Enter your question in the provided text box.
   Example: *Please rank the following Latin statements by character count, with 1 being the shortest and 5 the longest:*
2. Apply formatting using the toolbar.



Step 4: Add Answer Options

- Manually input up to 2 default options and add more by clicking More. Example:
  - Veni, vidi, vici
  - E pluribus unum
  - Carpe diem
  - Amor vincit omnia
  - Per aspera ad adstra

Step 5: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here’s how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, “View the media below, then answer the following question.”

Preview Mode

Before finalizing the Simple Rank Ordering question setup, it’s important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Simple Rank Ordering setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

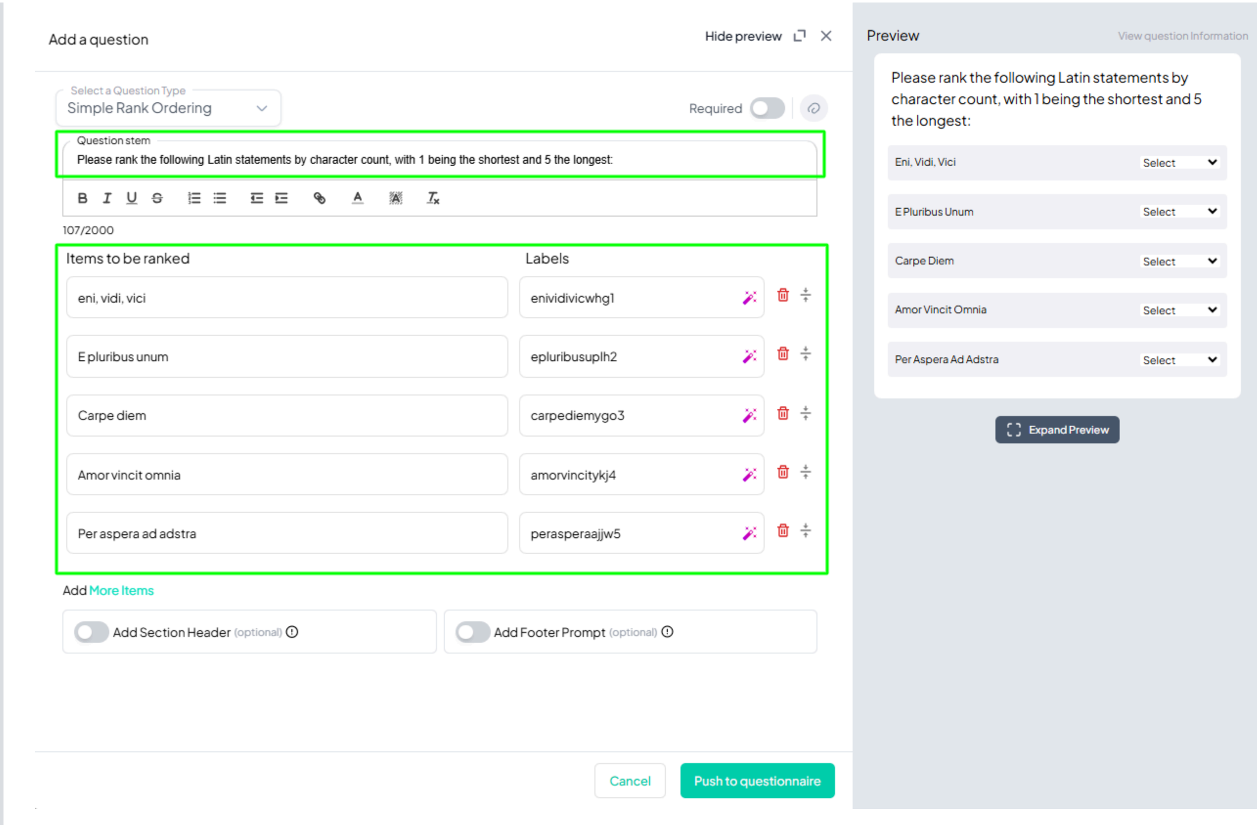
> **Question**
> *Please rank the following Latin statements by character count, with 1 being the shortest and 5 the longest:*
>
> **Responses**
>
> - Veni, vidi, vici
> - E pluribus unum

> - Carpe diem
> - Amor vincit omnia
> - Per aspera ad adstra

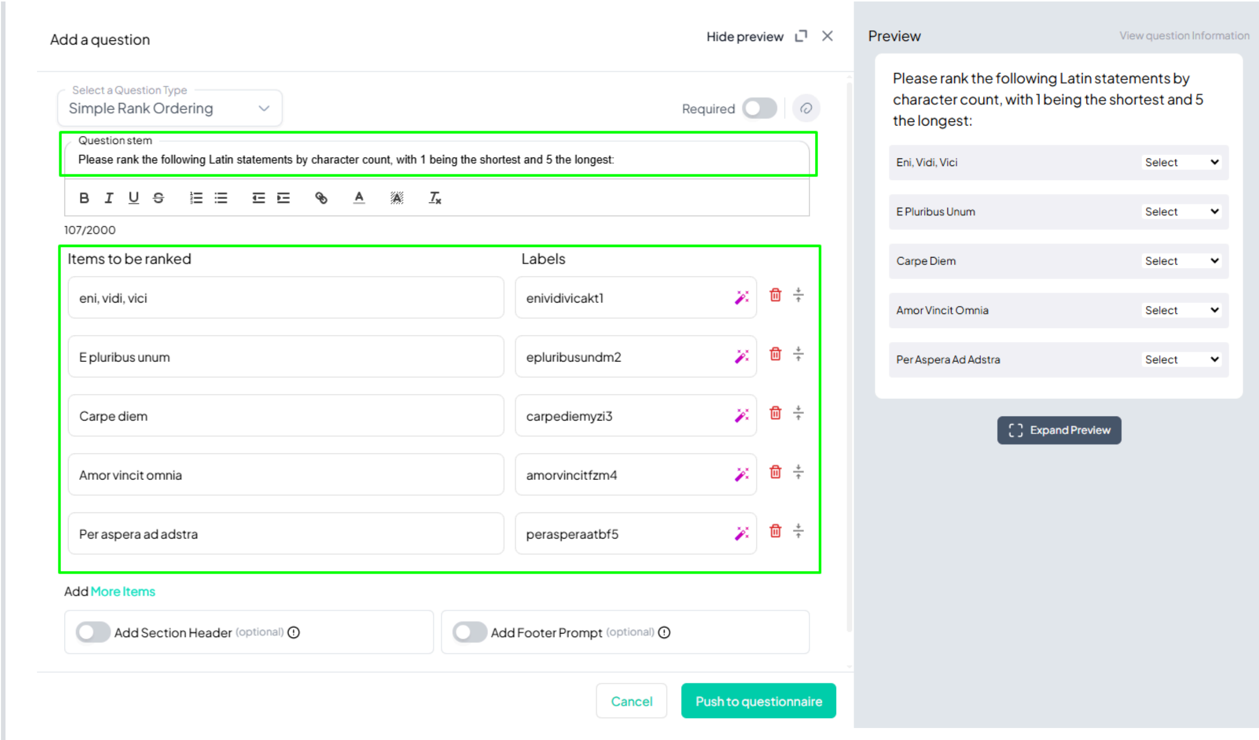
Additional Features:

- **Required:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

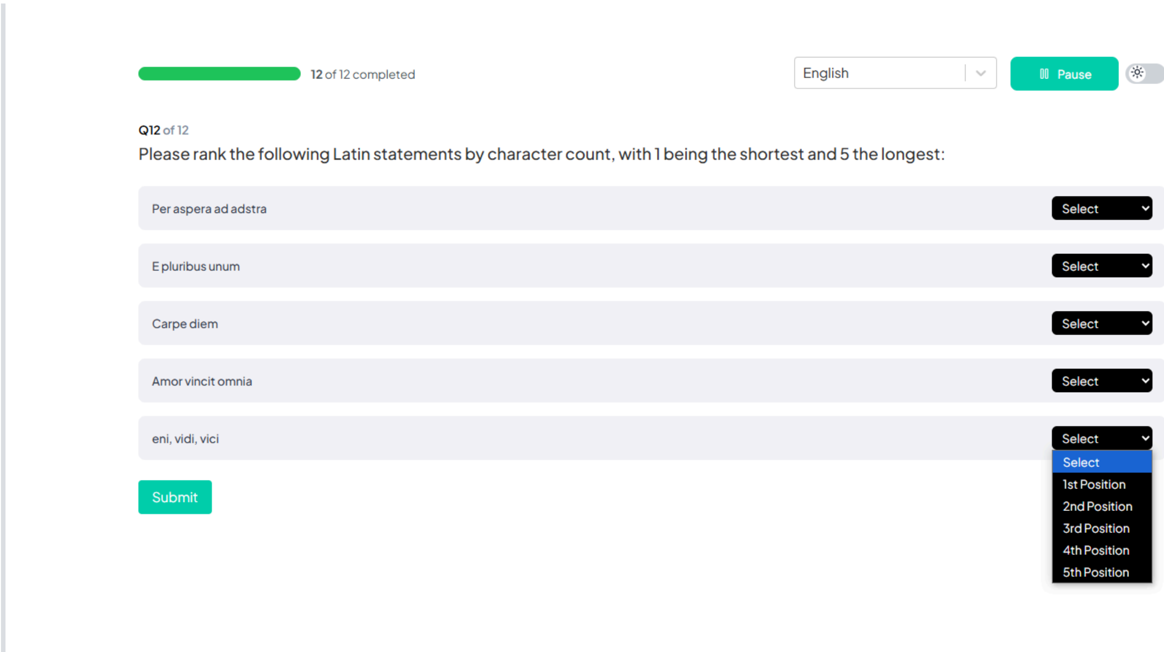
Simple Rank Ordering Added



Simple Rank Ordering Pushed Preview



Simple Rank Ordering Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares simplifies and strengthens the ranking experience by combining drag-and-drop ease with precise data capture. It ensures unique values for each item and supports clean, structured export formats for rapid analysis.

Key platform-specific advantages include:

- **Drag-and-Drop Ranking Interface**
  Participants can intuitively reorder options using a simple, interactive interface.
- **Automatic Rank Validation**
  Each option is assigned a unique rank, preventing duplication or incomplete responses.
- **Attribute Labeling**
  Assign **unique variable labels** to each ranked item for clean, analyzable output.
- **Flexible Input Configuration**
  Add as many ranked options as needed, with up to 2 default responses and more via the “More” button.
- **Media Support**
  Embed images, videos, or audio prompts to supplement the ranking task.
- **Required Toggle**
  Ensure full completion of the ranking before participants can continue.
- **Preview Mode**
  Test and confirm user experience before pushing to a live survey.

- **Structured Export Format**
  Each item's final rank is stored in a distinct variable, ideal for regression, comparative, or ordinal analysis.

Conclusion

The Simple Rank Ordering feature on Chisquares provides an intuitive and structured method for collecting ranked responses. By ensuring data integrity through validation checks, unique labeling, and multiple input options, researchers can efficiently analyze prioritization patterns within their surveys.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / DISCRETE CHOICE EXPERIMENT

Introduction

The Discrete Choice Experiment (DCE) is a powerful survey methodology that presents respondents with a series of hypothetical scenarios, each containing different attribute combinations. Respondents must choose their preferred option, allowing researchers to analyze decision-making processes and understand preferences.
With Chisquares, setting up a DCE is intuitive and flexible, enabling you to define key attributes, configure choice sets, and collect high-quality preference data.
This manual will guide you through the process of setting up and managing a Discrete Choice Experiment question, including advanced customization options.

Features of DCE in Chisquares

- **Question Text Input:** Create and format the core question prompt.
- **Response Options:** Define responses to be ranked.
- **Required Toggle:** Make the question mandatory to proceed.
- **Media Attachments:** Support for audio, image, or video file uploads.
- **Attribute Input:** Users enter a list of items to be ranked.
- **Unique Labeling:** Each attribute receives a unique label that adheres to platform conventions.

Use Cases

The **Discrete Choice Experiment (DCE)** question type is designed to simulate real-world decision-making by presenting respondents with sets of hypothetical options that vary based on multiple attributes. This method helps researchers understand trade-offs and the relative value participants assign to specific features or factors.

Common use cases include:

- **Product Development**: Identify which product features customers value most.
  Example: "Which smartphone features matter most to you—battery life, screen size, price, or camera quality?"

- **Pricing Strategy**: Understand price sensitivity and willingness to pay.
  Example: "Choose between three subscription plans that vary by cost and included features."

- **Healthcare Research**: Assess patient preferences for treatments or service models.
  Example: "Rank your preference between treatment options that vary in duration, side effects, and cost."

- **Transportation & Policy Design**: Inform planning based on citizen trade-offs.
  Example: "Select the most appealing commuting option based on travel time, cost, and environmental impact."

- **Market Segmentation**: Group respondents based on patterns in choice behavior.
  Example: "Which combination of hotel attributes (price, location, amenities) do you prefer?"

When to Use Discrete Choice Experiment Questions

Use DCE Questions when:

- You want to uncover **how respondents make trade-offs** between multiple competing factors.
- You are studying **preference strength, not just selections**—understanding what drives choice.
- Your objective is to **simulate real-life decision-making environments** through hypothetical scenarios.
- You require **quantitative preference modeling** (e.g., utilities, marginal rates of substitution).
- You aim to support **pricing, product design, or service optimization** decisions using actual respondent behavior.

Scenario-Based Example
In a car purchase preference study, participants are asked:

> *"Imagine you're shopping for a new car. You'll be presented with different sets of vehicle attributes like price, fuel efficiency, horsepower, safety features, and design. Please rank the three shown attributes in each screen*

> *from most to least important."*
> This data reveals which features carry the most decision-making weight.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

2. Add Answer Options

- Manually input up to 4 default attributes and add more by clicking **More Attributes**. Provide a unique label for each Attribute.

3. Mark as Required (Optional)

- Toggle "Required" to make it mandatory.

4. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Step-by-Step Guide

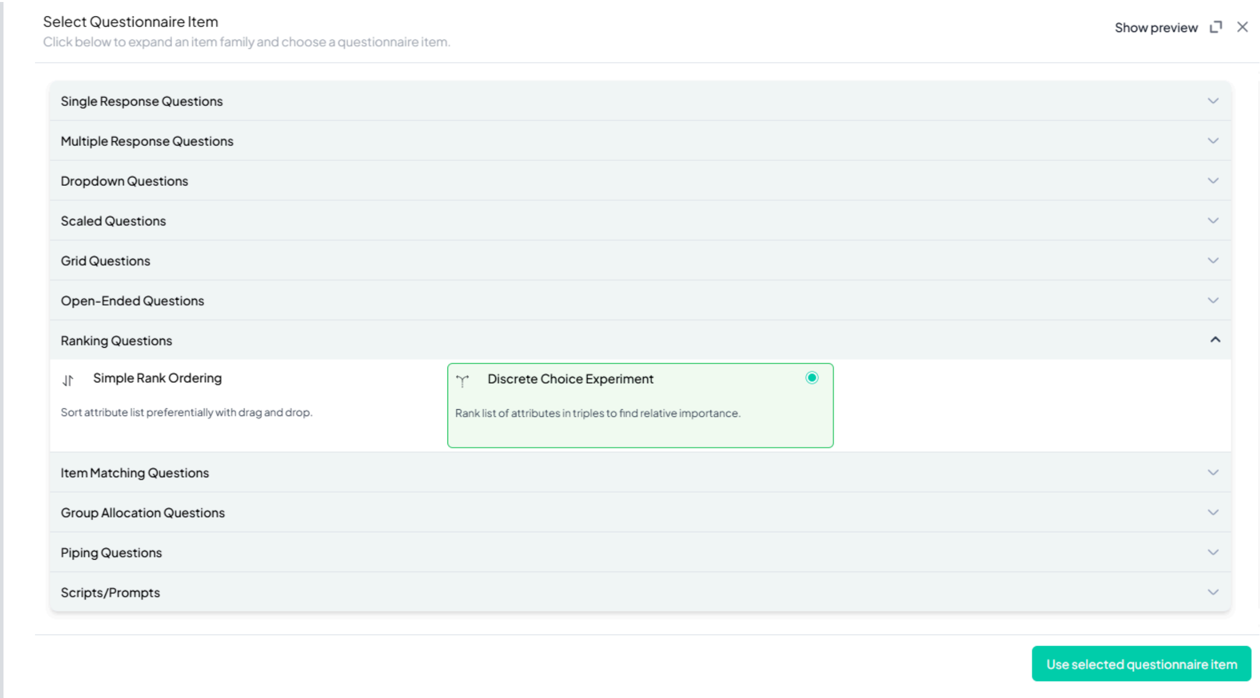
Step 1: Create a New Question

To begin creating a Discrete Choice Experiment question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

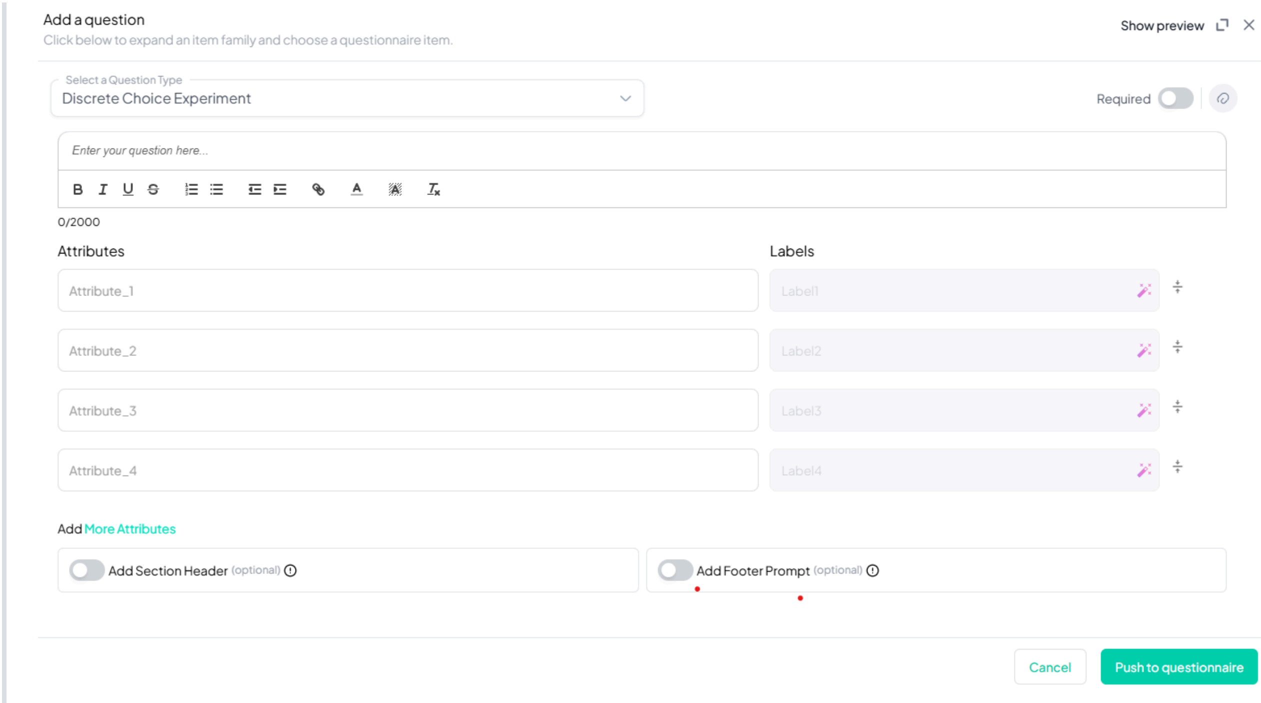
Step 2: Select the Question Type

1. In the question type section, select **Ranking Questions.**
2. Choose **Discrete Choice Experiment** from the list of available question types.
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the Discrete Choice Experiment question type, you will be prompted to add your question. Enter your question in the provided text box.
   Example: *Imagine you're shopping for a new car and are presented with several options varying in price, fuel efficiency, horsepower, safety features, and design. On the following screens, you'll see three attributes at a time—please rank them from most to least important to you.*
2. Apply formatting using the toolbar.



Step 4: Add Answer Options

- Manually input attributes to be ranked and provide label for each attribute.

Step 5: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 6: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here's how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, "View the media below, then answer the following question."

Preview Mode

Before finalizing the Discrete Choice Experiment question setup, it's important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Discrete Choice Experiment setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

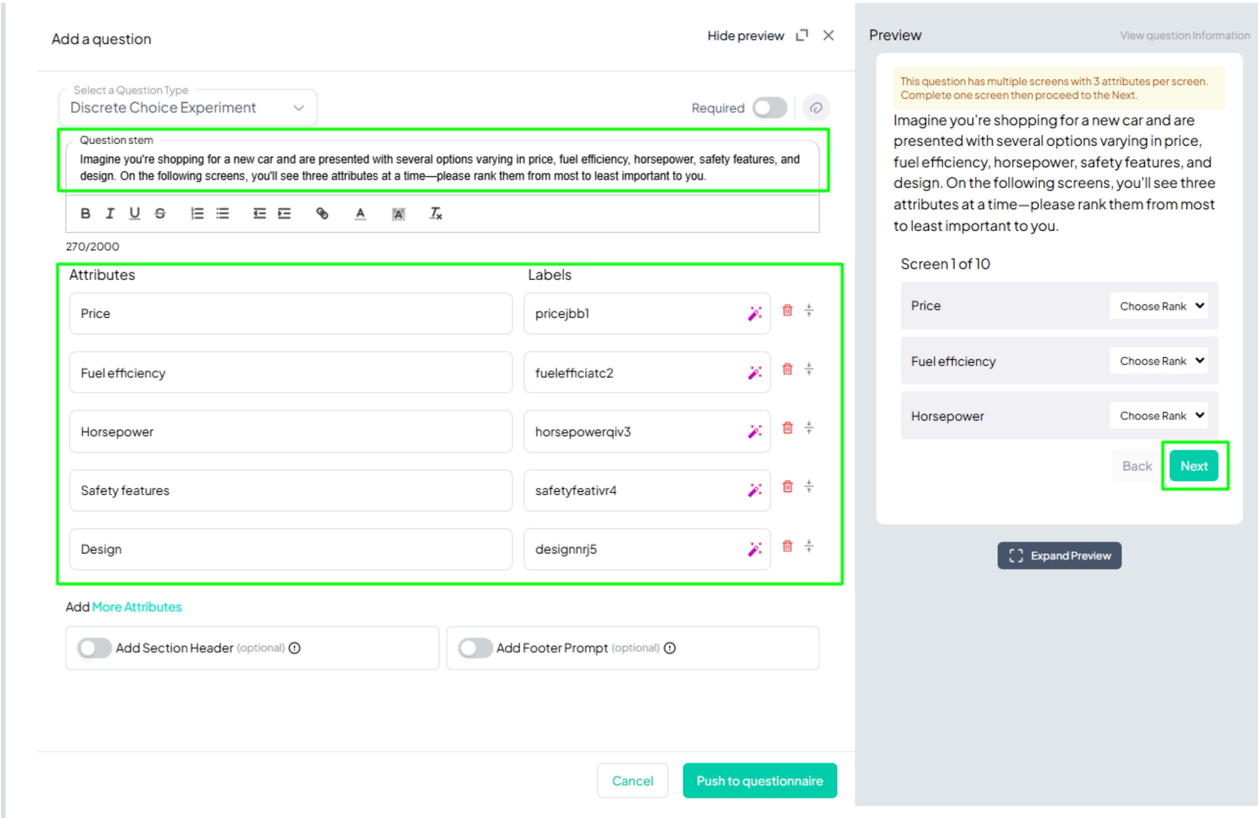
Example Question Setup

> **Question**
> *Imagine you're shopping for a new car and are presented with several options varying in price, fuel efficiency, horsepower, safety features, and design. On the following screens, you'll see three attributes at a time—please rank them from most to least important to you.*
>
> **Response options** (attributes)
>
> - Price
> - Fuel efficiency
> - Horsepower
> - Safety features
> - design

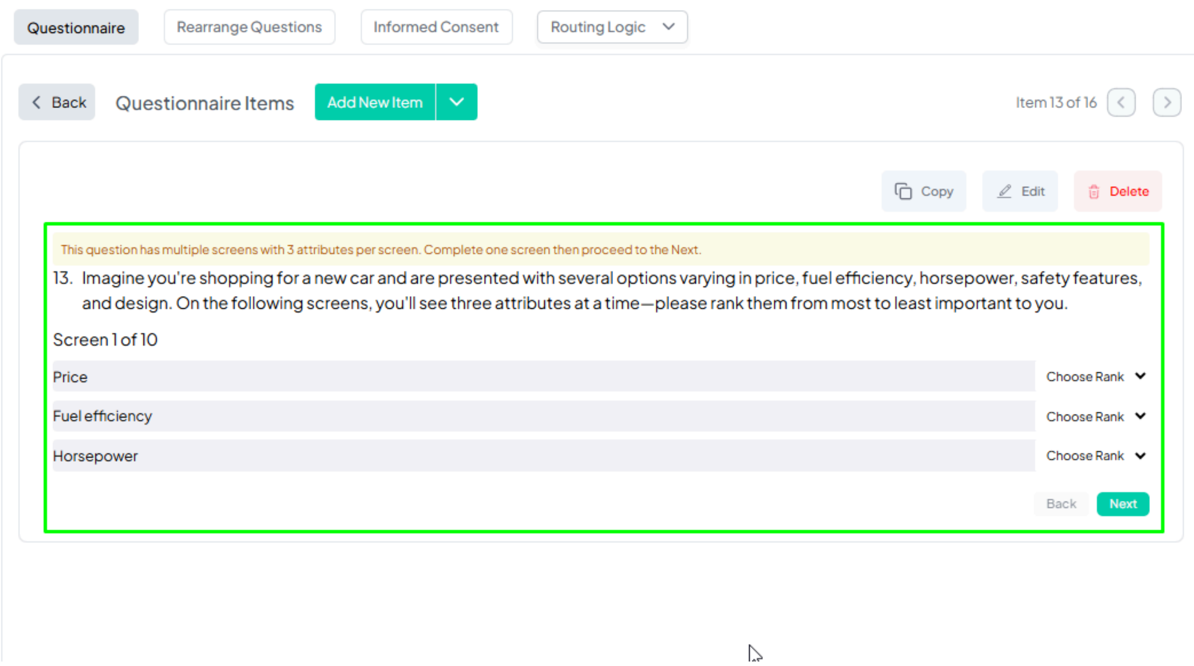
Additional Features:

- **Required:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

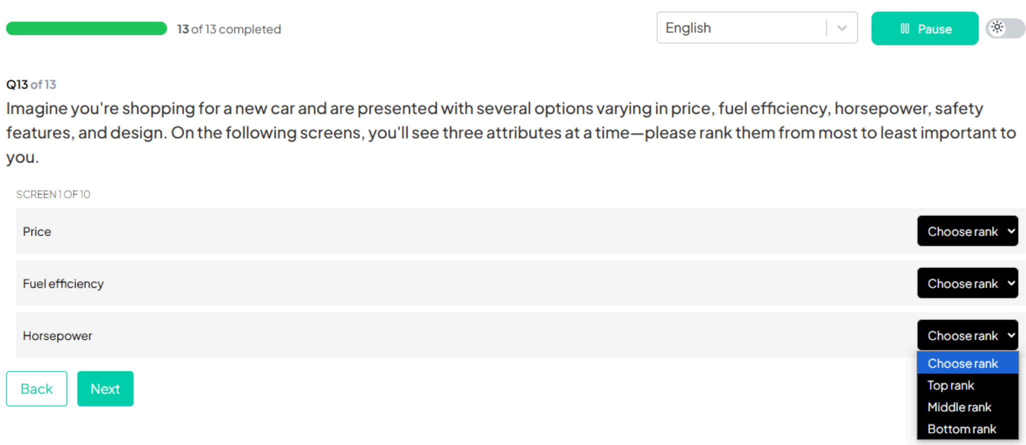
Discrete Choice Experiment (DCE) Question Added



Discrete Choice Experiment (DCE) Question Pushed Preview



Discrete Choice Experiment (DCE) Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares makes the design and deployment of Discrete Choice Experiments simple, accurate, and analytically powerful. The platform supports flexible configurations and rich data exports suited for advanced statistical modeling.

Key platform-specific advantages include:

- **Customizable Attribute Lists**
  Define multiple attributes, each with unique levels and labels for clean data capture.

- **Sequential Choice Screens**
  Present multiple rounds of attribute combinations, improving data reliability.

- **Drag-and-Drop or Click-to-Rank Interface**
  Users interactively rank attributes from most to least important.

- **Automatic Labeling**
  Every attribute receives a unique label to ensure structured data for modeling.

- **Randomization Options**
  Randomize attributes across screens to reduce order bias and test consistency.

- **Required Toggle**
  Ensure participants complete each screen before advancing.

- **Media Integration**
  Add supporting visuals, video demos, or icons to enhance comprehension and engagement.

- **Preview and Edit Mode**
  Visualize how each choice set appears to participants before launch.

- **Clean, Model-Ready Export**
  Outputs formatted for use in DCE modeling tools (e.g., Sawtooth, R, Stata).

Conclusion

The Discrete Choice Experiment (DCE) feature in Chisquares is an essential tool for analyzing user preferences in complex decision-making scenarios. By setting up a DCE, you can collect structured preference data to inform product development, pricing strategies, and market research.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / ITEM-TO-OPTION MATCHING

Introduction

The Item-To-Option Matching question type in Chisquares allows respondents to match pairs of items, ensuring structured and precise data collection. This question format is useful in scenarios such as educational assessments, market research, and knowledge testing. Respondents are presented with a list of items and a corresponding set of options from which they can select the correct match via a dropdown menu.
Chisquares supports two types of matching:

- **Text-to-Text Matching:** Both items and options are text-based.
- **Image-to-Text Matching:** Items are images, and options are text labels.

This guide will walk you through setting up and customizing an **Item-To-Option Matching** question, detailing key features and advanced functionalities.

Features

- **Question Text Input:** Create and format the core question prompt.
- **Response Options:** Define selectable answers manually or dynamically.
- **Required Toggle:** Make the question mandatory to proceed.
- **Media Attachments:** Support for audio, image, or video file uploads.
- **Two Matching Formats:** Choose between text-to-text or image-to-text matching.
- **Dropdown Selection:** Users match each item with one option from a predefined list.
- **Automated Completion:** When only one unmatched item-option pair remains, the system automatically assigns it.
- **Item Type and Behavior:** Using text or image as item and randomizing item list.

Use Cases

The **Item-to-Option Matching Question** is ideal for scenarios where respondents need to demonstrate knowledge or establish relationships between paired concepts. It’s frequently used in assessments, language learning, and cognitive testing where one-to-one associations are measured.

Common use cases include:

- **Educational Assessments**: Match terms with definitions, dates with events, or formulas with descriptions.
  Example: “Match each historical event to its correct date.”

- **Language Learning**: Pair vocabulary words or phrases with their translations or meanings.
  Example: “Match these Latin expressions with their English equivalents.”

- **Product Mapping in Research**: Connect features with corresponding brands or models.
  Example: "Match these smartphone features to the correct product."

- **Compliance Training**: Align policies or procedures with corresponding scenarios.
  Example: "Match each workplace situation to the correct compliance protocol."

- **Image-Based Matching**: Test visual recognition by asking users to match images to their correct descriptions.
  Example: "Match each icon to the correct functionality."

When to Use Item-to-Option Matching Questions

Use Item-to-Option Matching Questions when:

- You want to assess **recall, comprehension, or relational knowledge**.
- The task requires respondents to **map distinct items to their corresponding choices**.
- You're conducting **formative assessments, diagnostic tests, or quizzes**.
- You want to support **interactive learning experiences** through visual or textual associations.
- You aim to collect structured input while **minimizing guessing from multiple-choice formats**.

Scenario-Based Example
In a classical studies quiz, participants are asked:

> *"Match the Latin expressions on the left with their English translations on the right."*
> This allows for efficient testing of language comprehension using an intuitive dropdown interface.

Basic Setup

1. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

3. Add Answer Options

- **Items:** Define the list of items (either text-based or images).
- **Options:** Provide the corresponding response choices.

Item Labels

- If using text items, ensure each is unique.
- If using images, each image must have a label.

4. Mark as Required (Optional)

- Toggle "Required" to make it mandatory.

5. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Advanced Features

- **Custom Feedback:** Enable feedback on correct/incorrect responses.

- **Randomization:** Shuffle item order to minimize response bias.
- **Image Resizing:** Adjust image dimensions for consistent display.

Step-by-Step Guide

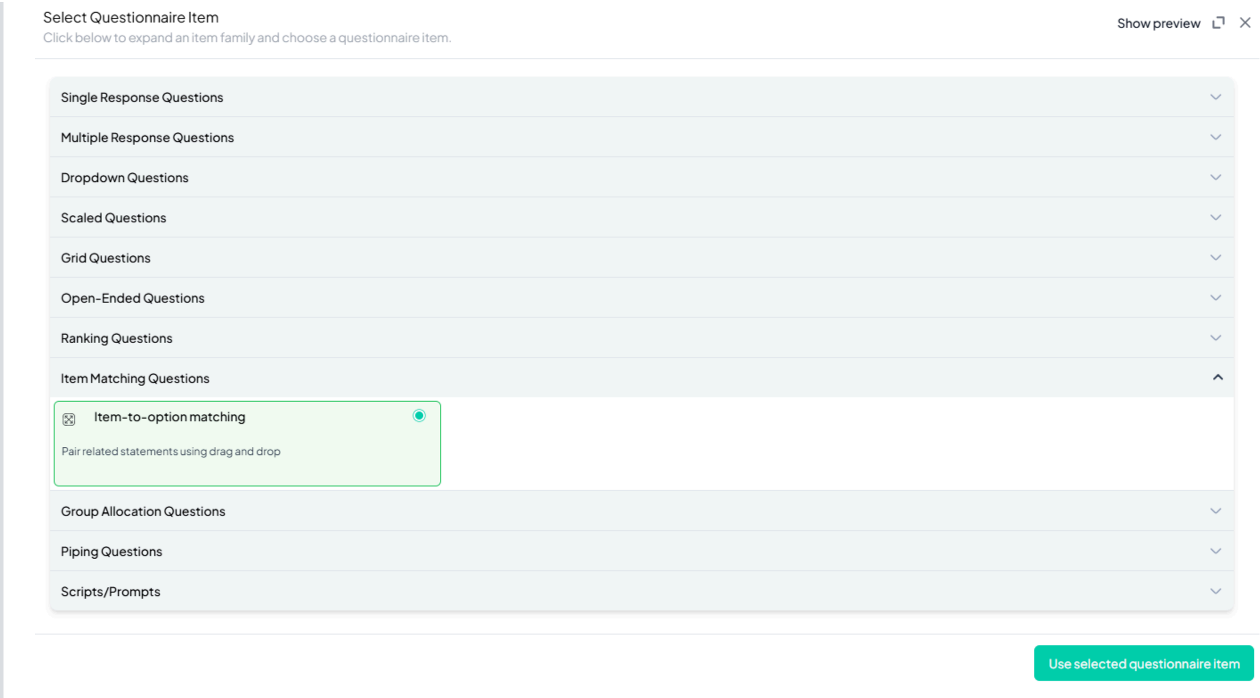
Step 1: Create a New Question

To begin creating a Item-To-Option Matching question:

1. Log into your **Chisquares Investigator Portal.**
2. Navigate to the **Survey Design** section.
3. Click on the **Create a New Question** button.

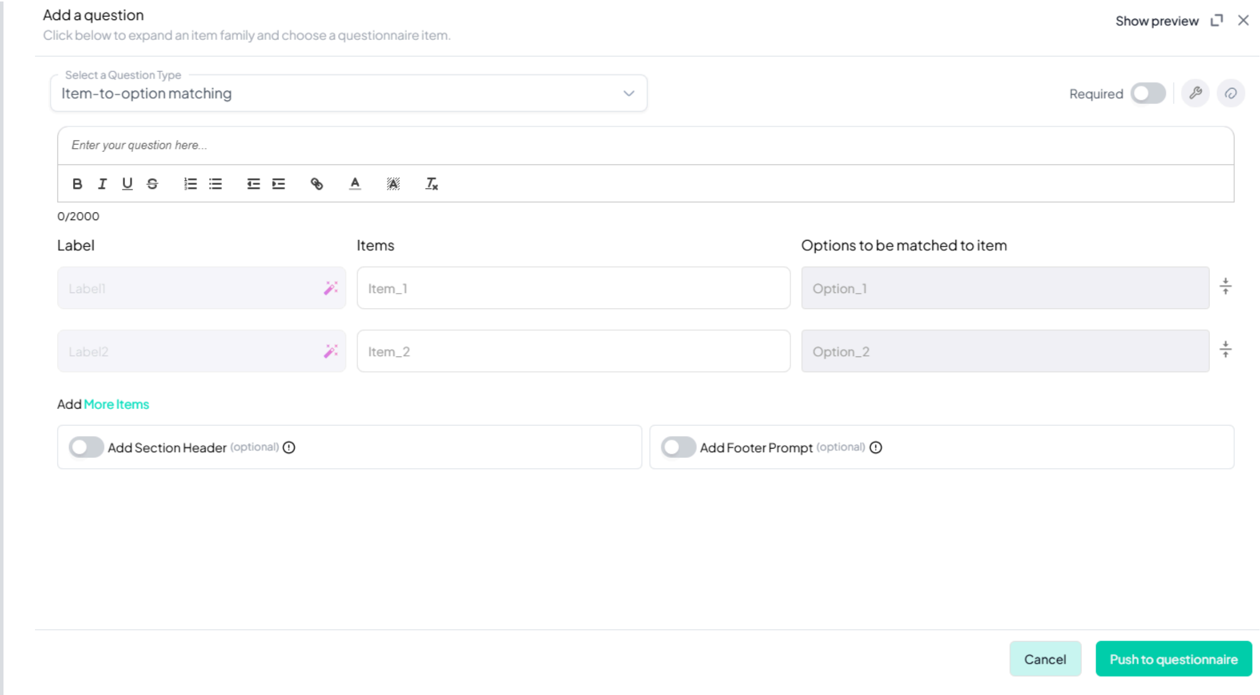
Step 2: Select the Question Type

1. In the question type section, select **Item Matching Questions.**
2. Choose **Item-to-Option Matching.**
3. Click **Use Selected questionnaire item.**



Step 3: Add Your Question

1. After selecting the Item-to-Option Matching question type, you will be prompted to add your question. Enter your question in the provided text box.
   Example: *Match the Latin expressions on the left with their English translations on the right by dragging and dropping the options into the correct pairs.*
2. Apply formatting using the toolbar.



Step 4: Define Items and Options

1. Enter the items (text or upload images).
2. Enter the options (text-based answers).
3. Ensure that each item has a corresponding option.
4. Provide label for each item.

Step 5: Configure Display Options

1. Enable randomization if needed.

Step 6: Make the Question Required (Optional)
If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 7: Add Media (Optional)
You can upload media (images, videos, or audio files) to accompany the question. Here's how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, "View the media below, then answer the following question."

Preview Mode

Before finalizing the Item-to-Option Matching setup, it is important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Item-to-Option Matching setup:

1. Click **Push to Questionnaire** to add the question to your live survey.

2. If you need to make edits later, you can always return to the question editor to make changes.

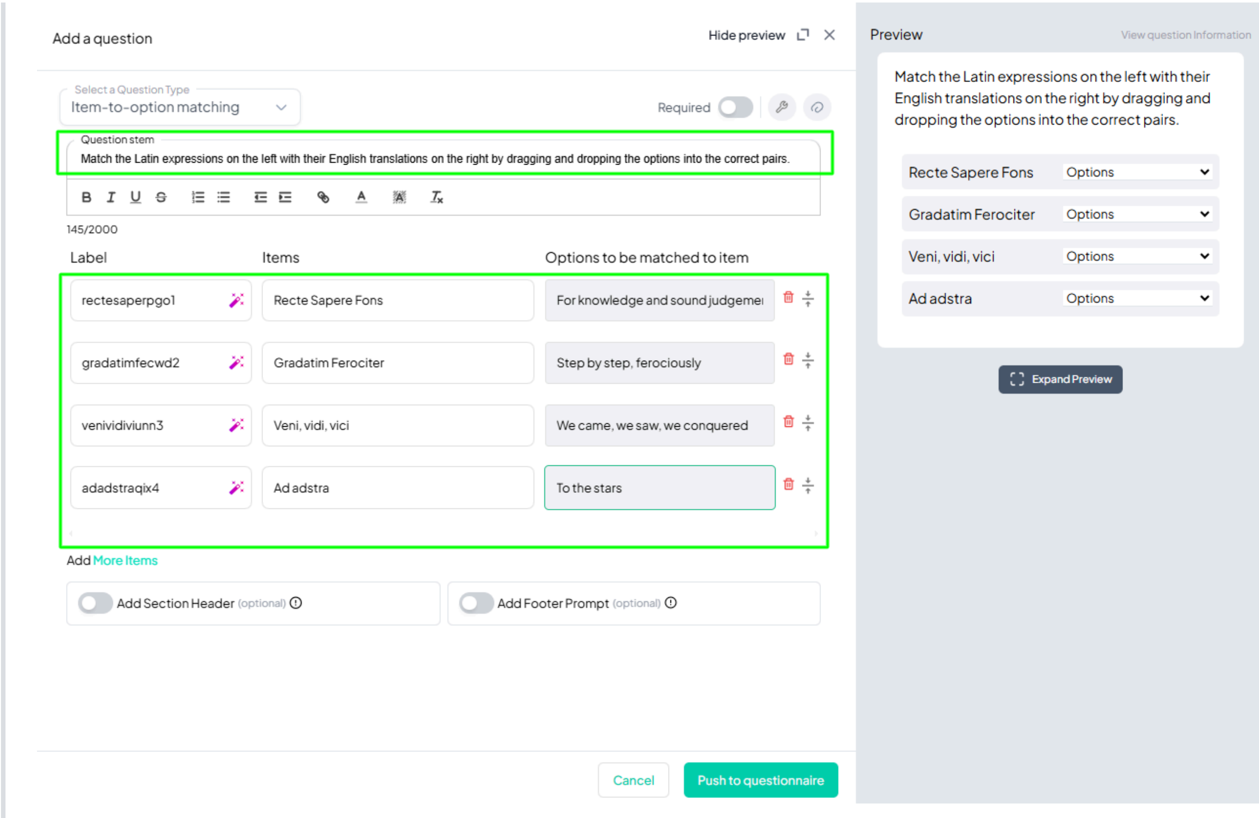
Example Question Setup

> **Question**
> *Match the Latin expressions on the left with their English translations on the right by dragging and dropping the options into the correct pairs.*
>
> **Responses**
>
> | Values | Options |
> | --- | --- |
> | Recte Sapere Fons | For knowledge and sound judgement |
> | Gradatim Ferociter | Step by step, ferociously |
> | Veni, vidi, vici | We came, we saw, we conquered |
> | Ad adstra | To the stars |

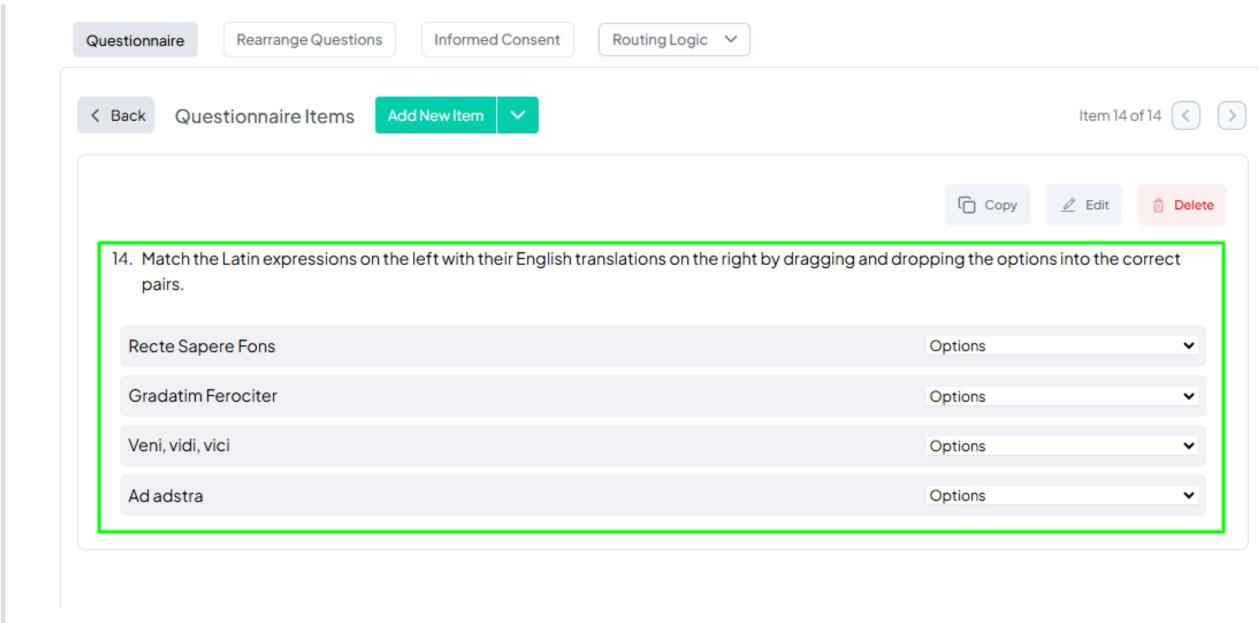
Additional Features:

- **Required:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

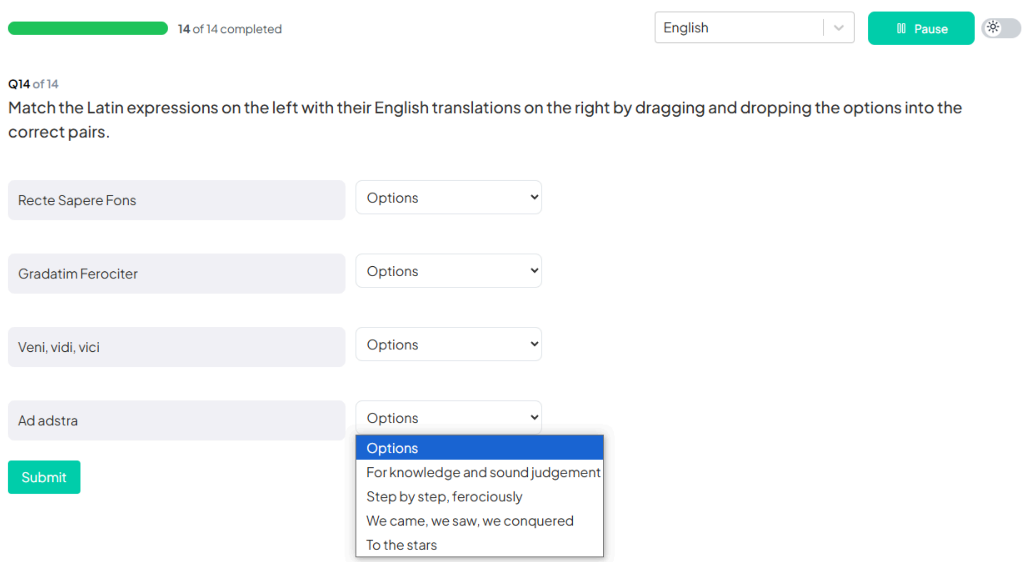
Item-to-Option Matching Question Added



Item-to-Option Matching Question Pushed Preview



Item-to-Option Matching Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares delivers a seamless and flexible experience for creating **matching questions** that are both user-friendly and data-ready. The platform supports multiple formats and provides built-in mechanisms for validation and feedback.

Key platform-specific advantages include:

- **Support for Two Matching Formats**
    - **Text-to-Text Matching**: Standard matching between written phrases.
    - **Image-to-Text Matching**: Visual prompts matched with textual options.
- **Interactive Dropdown Matching**
  Respondents select the correct match from dropdown lists aligned with each item.

- **Automated Final Pairing**
  If only one match remains, the system can **auto-complete the last pair**, streamlining the experience.

- **Customizable Labels**
  Assign a unique label to each item and option to ensure clean data export and easy analysis.

- **Randomization Controls**
  Shuffle the order of items to reduce order bias and support randomized testing formats.

- **Media Integration**
  Include audio, images, or videos to supplement item understanding or simulate real-world scenarios.

- **Image Resizing Options**
  Ensure visual consistency across image-based matching tasks.

- **Required Toggle**
  Force respondents to complete all matches before moving forward.

- **Preview and Validation Mode**
  Ensure correct display and logic configuration before publishing the live questionnaire.

Conclusion

The Item Matching question in Chisquares provides a structured way to assess respondent knowledge and preferences through intuitive matching tasks. With support for text and image-based matching, automated validation, and advanced customization options, it is a versatile tool for surveys and assessments.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / RANDOMIZED TRIAL

Introduction

The Randomized Trial question type in Chisquares is designed to facilitate unbiased research by randomly assigning participants to view different media formats before answering a foundational question. This ensures that responses are not influenced by selection bias, making it ideal for experimental studies, A/B testing, and behavioral research.
This manual provides step-by-step guidance on how to set up, customize, and analyze the Randomized Trial question type, ensuring a seamless survey experience for both investigators and respondents.

Features of the Randomized Trial Question Type

- **Question Text Input:** Create and format the core question prompt.
- **Response Options:** Define selectable answers manually or dynamically.
- **Required Toggle:** Make the question mandatory to proceed.

- **Random Assignment:** Each participant is randomly assigned to view one media file (image, video, or audio) before answering a question.
- **Media Upload:** Users can upload multiple media files to be randomized among participants.
- **Foundation Question Support:** Compatible with foundational question types such as Single Value Text, Likert Scale, Multiple Choice (MCQ), Sliding Scale, Yes/No, Multiple Responses, and Dropdown.

Use Cases

The **Randomized Trial Question** type is designed for conducting experimental research by randomly exposing respondents to one version of media before asking a standardized question. It is a highly effective format for eliminating selection bias and studying **causal impact**, **media influence**, or **perceptual differences** based on controlled stimuli.

Common use cases include:

- **A/B Testing**: Compare user reactions to multiple designs, messages, or concepts.
  Example: "Test which advertisement version drives higher perceived brand quality."

- **Behavioral Research**: Assess how different visual cues influence beliefs or choices.
  Example: "Evaluate perception of harm based on cigarette packaging designs."

- **Public Health Studies**: Explore how visual warnings affect risk perception or decision-making.
  Example: "Compare responses to different nutritional label formats."

- **Marketing & UX Feedback**: Analyze user response to branding elements or feature layouts.
  Example: "Rate the appeal of this mobile app interface."

- **Social Science Experiments**: Study how exposure to varied content alters attitudes or judgments.
  Example: "Assess how different news headlines shape opinions on political events."

When to Use Randomized Trial Questions

Use Randomized Trial Questions when:

- You want to **eliminate selection bias** by randomizing participant exposure to media content.
- Your research goal includes **testing the causal effect** of different treatments or designs.
- You need to expose respondents to **different versions of the same concept** and measure variance in response.
- The same foundational question applies across multiple randomized conditions.
- You aim to **collect clean, unbiased data for experimental or A/B test frameworks**.

Scenario-Based Example
In a tobacco packaging study, each participant is randomly shown one image of a cigarette pack with varying warning labels. The question:

> *"Based on the packaging shown, how harmful do you think this tobacco product would be if smoked daily?"*
> remains constant, enabling comparison across groups.

Basic Setup

1. Add Media

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

2. Select foundational question

- Choose from the list of supported question types.

3. Enter Question

- Type your question using the rich-text editor (bold, italics, hyperlinks, etc.).

4. Label the Question

- Add a label to help identify the question within your survey. Alternatively, you can use AI to get suggestions for the label.

5. Add Answer Options

- Add responses based on the foundational question type selected.

6. Mark as Required (Optional)

- Toggle “Required” to make it mandatory.

Step-by-Step Guide

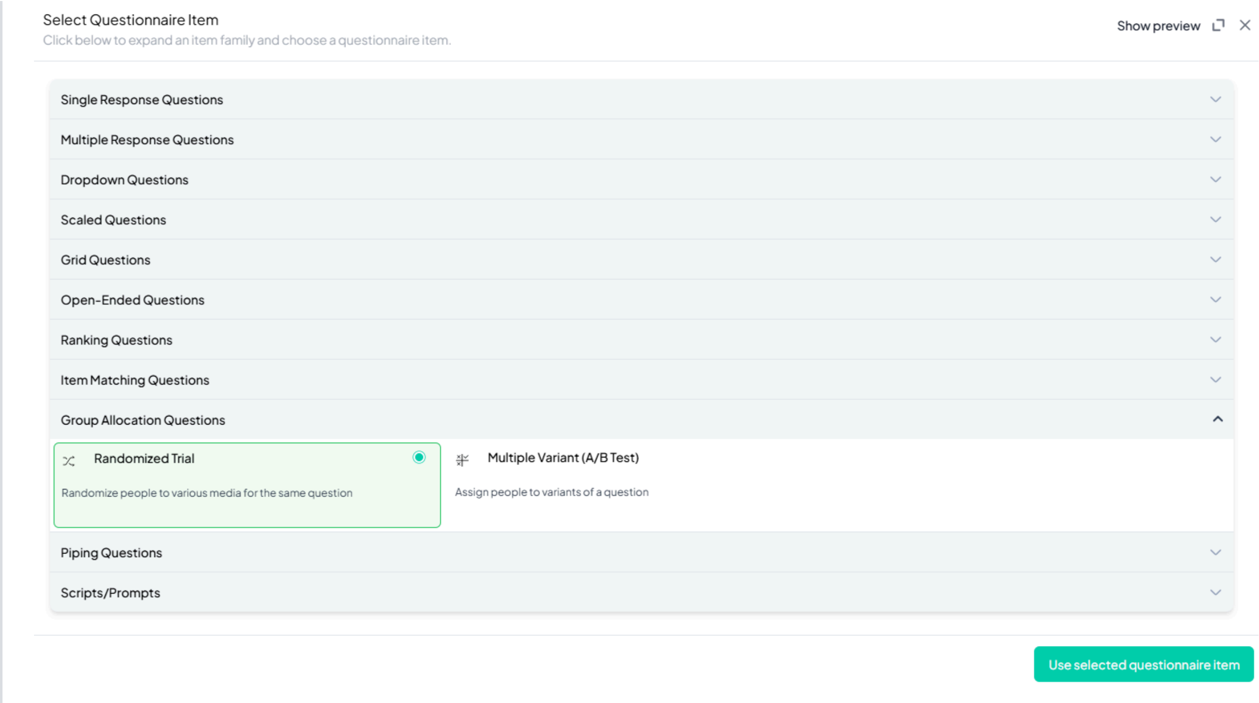
Step 1: Create a New Question

1. Log into your **Chisquares Investigator Portal**.
2. Navigate to the **Survey Design** section.

3. Click **Create a New Question**.

Step 2: Select the Question Type

1. In the question type section, select **Group Allocation Questions.**
2. Choose **Randomized Trial** from the list of available question types.
3. Click **Use Selected questionnaire item.**

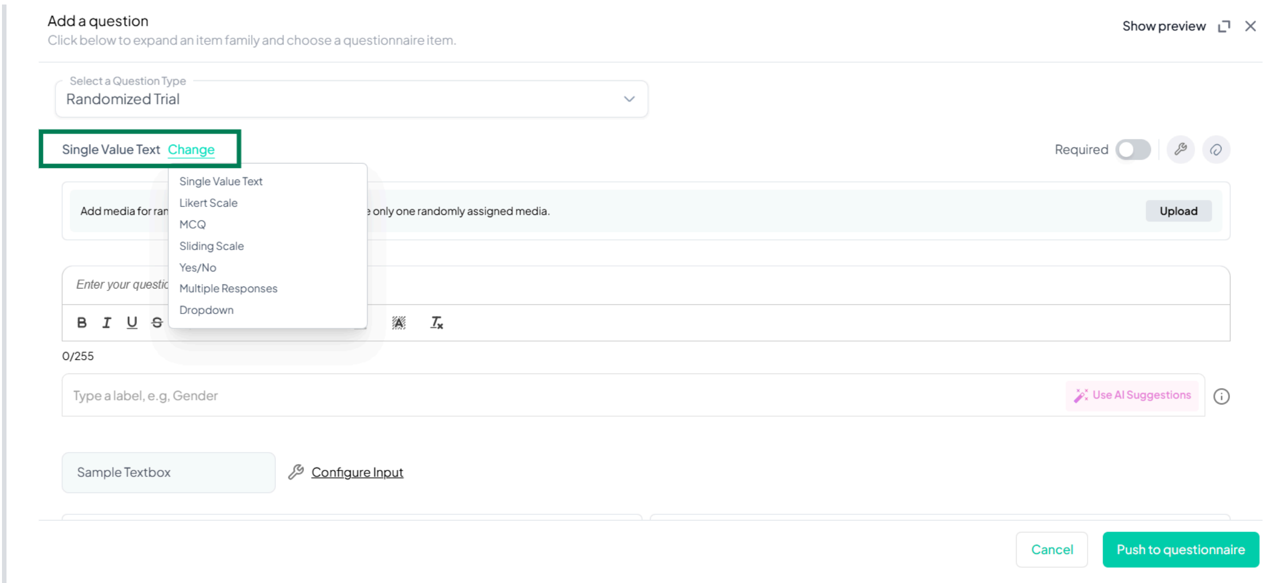


Step 3: Uploading Media Files

1. Click the **Upload** button.
2. Select multiple images, videos, or audio files from your device.
3. Assign a unique label for each file.
4. Click Save to finalize the upload.

Step 4: Choosing a Foundational Question Type

1. Click **Change**, and select one of the following foundational question types:
    - Single Value Text
    - Likert Scale
    - Multiple Choice (MCQ)
    - Sliding Scale
    - Yes/No
    - Multiple Responses
    - Dropdown



Step 5: Add Your Question

1. Enter your question in the provided text box.
   Example: *Based on the packaging shown, how harmful do you think this tobacco product would be if smoked daily?*
2. Apply formatting using the toolbar.
3. Configure the foundational question settings as required.
4. The Randomized Trial question inherits all properties of the foundational question type.

Step 5: Make the Question Required (Optional)
If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Preview Mode

Before finalizing the Randomized Trial setup, it is important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Randomized Trial setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

> **Question**
> View the image below then answer the question that follows:
>
> *Based on the packaging shown, how harmful do you think this tobacco product would be if smoked daily?*
>
> **Responses**
> Not harmful at all
> Slightly harmful

> Somewhat harmful
> Very harmful
> Extremely harmful
>
> *[Note: Each participant will see only one randomly assigned image of a cigarette pack from the options uploaded by the researcher. The question remains the same for all participants.]*

Additional Features:

- **Required:** No
- **Change foundational question:** Change the foundational question to an appropriate one for your Randomized Trial.
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

Value Proposition on the Chisquares Platform

Chisquares makes the creation of randomized experimental questions seamless by integrating **random media assignment** with a wide range of foundational question types. This enables flexible study design with strong internal validity.

Key platform-specific advantages include:

- **Random Media Assignment**
  Upload multiple images, videos, or audio files; Chisquares automatically assigns one media file per respondent.

- **Supported Question Types**
  Compatible with:
  - Single Value Text
  - Likert Scale
  - Multiple Choice (MCQ)
  - Sliding Scale
  - Yes/No
  - Multiple Responses
  - Dropdown
- **Unified Question Logic**
  All respondents answer the same foundational question, ensuring consistency across randomized trials.
- **Automated Data Structuring**
  Each response is tagged with the associated media file for clean analysis by condition.
- **Media Metadata Capture**
  Track which asset was shown to each participant, along with time viewed (where applicable).
- **Media Upload & Labeling**
  Upload up to 4MB per media file, with auto-labeling and drag-and-drop ordering.
- **Changeable Foundational Question Type**
  Flexibly swap foundational question types without needing to recreate the entire setup.
- **Required Toggle**
  Enforce response completion after media exposure.

- **Preview & Testing**
  Fully preview how the question and randomized media appear to respondents before publishing.

Conclusion

The Randomized Trial question type in Chisquares is a powerful tool for conducting unbiased experimental research. By randomizing media exposure before responses, it eliminates selection bias and enhances the validity of findings. Whether used for behavioral research, A/B testing, or public health studies, this feature provides a flexible and structured approach to gathering data.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / Multiple Variant (A/B test)

Introduction

A/B Testing (also known as split testing) is a method for comparing two or more variations of content to determine which performs better. In the Chisquares platform, the A/B Test question type allows users to randomly present different question variations to respondents, ensuring unbiased data collection. This feature is particularly useful for optimizing survey design, assessing content effectiveness, and evaluating user engagement.

This manual provides a comprehensive guide to setting up and managing A/B Test questions within Chisquares, covering basic setup, advanced features, and step-by-step instructions.

Features

- **Question Text Input:** Create and format the core question prompt.

- **Response Options:** Define selectable answers manually or dynamically.
- **Required Toggle:** Make the question mandatory to proceed.
- **Random Assignment:** Each participant is randomly assigned to view one media file (image, video, or audio) before answering a question.
- **Media Upload:** Users can upload multiple media files to be randomized among participants.
- **Foundation Question Support:** Compatible with foundational question types such as Single Value Text, Likert Scale, Multiple Choice (MCQ), Sliding Scale, Yes/no, Multiple Responses, Dropdown, and Prompts.

Use Cases

The **A/B Test (Multiple Variant) Question** type is designed to help researchers compare the performance of two or more question variations. By randomly (or conditionally) assigning different versions of a question to respondents, researchers can determine which version is more effective, engaging, or persuasive—without bias.

Common use cases include:

- **Message Testing**: Evaluate different versions of marketing or policy messages.
  Example: "Which headline better communicates the urgency of climate action?"

- **Design Comparison**: Test reactions to alternate layouts, packaging, or imagery.
  Example: "Compare user responses to different versions of product labels."

- **Question Format Optimization**: Assess which question format (e.g., Likert vs. MCQ) yields better response quality.

Example: "Determine whether scale-based or categorical framing leads to more thoughtful responses."

- **Behavioral Research**: Explore how slight wording differences affect perceptions or decisions.
  Example: "Does rephrasing the question change how harmful respondents perceive a product to be?"

- **Content Personalization Trials**: Experiment with tailored survey content based on demographic or behavioral data.
  Example: "Test which intro message works better for different age groups."

When to Use A/B Test Questions

Use A/B Test Questions when:

- You want to **compare the effectiveness of multiple versions** of a question or prompt.
- The goal is to **refine survey design** through data-backed testing.
- You need to assess **how media, question wording, or layout impacts responses**.
- Randomization or **conditional logic-based distribution** of variants is critical.
- You require a **controlled test environment** with built-in random assignment.

Scenario-Based Example
In a public health survey, researchers want to test two different phrasings of the same question about tobacco packaging. Participants are randomly assigned to one version:

> *Version A:* “Based on the packaging shown, how harmful do you think this tobacco product would be if smoked daily?”
> *Version B:* “How dangerous does the packaging make this product seem for daily use?”
> Comparing responses reveals which framing more effectively communicates perceived risk.

Basic Setup

- **Define Question Variants:** Create two or more variations of the same question.
- **Assign Answer Type:** Choose from supported response options.
- **Randomization:** Ensure each respondent receives only one variant.
- **Required Toggle:** Make the question mandatory to proceed.
- **Media Upload:** Users can upload multiple media files to be randomized among participants.

Advanced Features

- **Conditional Display Logic/Non-random Allocation:** Show variants based on predefined set up condition.

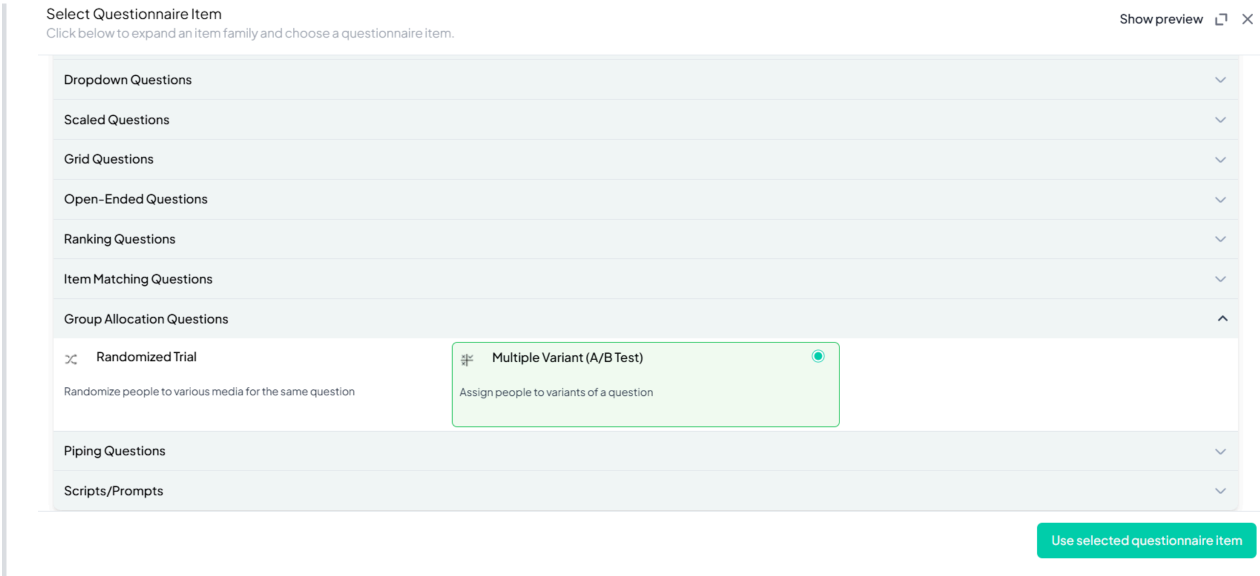
Step-by-Step Guide

Step 1: Create a New Question

1. Log into your **Chisquares Investigator Portal**.
2. Navigate to the **Survey Design** section.
3. Click **Create a New Question**.

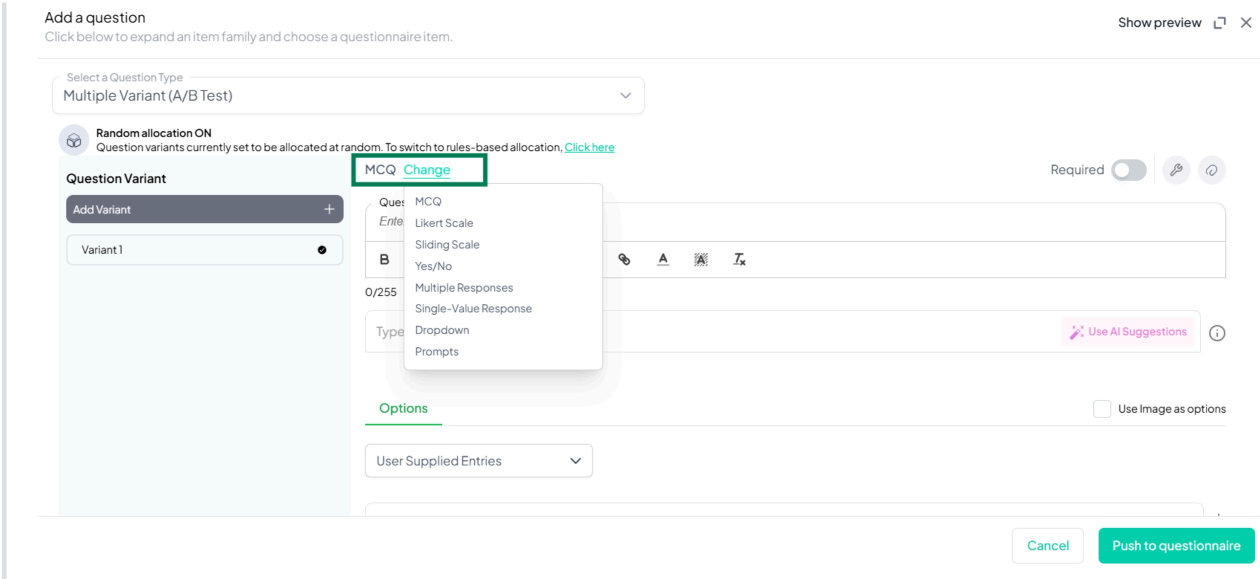
Step 2: Select the Question Type

1. In the question type section, select **Group Allocation Questions.**
2. Choose **Multiple Variant (A/B Test)** from the list of available question types.
3. Click **Use Selected questionnaire item.**



Step 3: Choosing a Foundational Question Type

1. Click **Change**, and select one of the following foundational question types:
   - Single Value Text
   - Likert Scale
   - Multiple Choice (MCQ)
   - Sliding Scale
   - Yes/No
   - Multiple Responses
   - Dropdown
   - Prompts



Step 4: Add Your Question

1. Enter your question in the provided text box.
   Example: *Based on the packaging shown, how harmful do you think this tobacco product would be if smoked daily?*

2. Apply formatting using the toolbar.

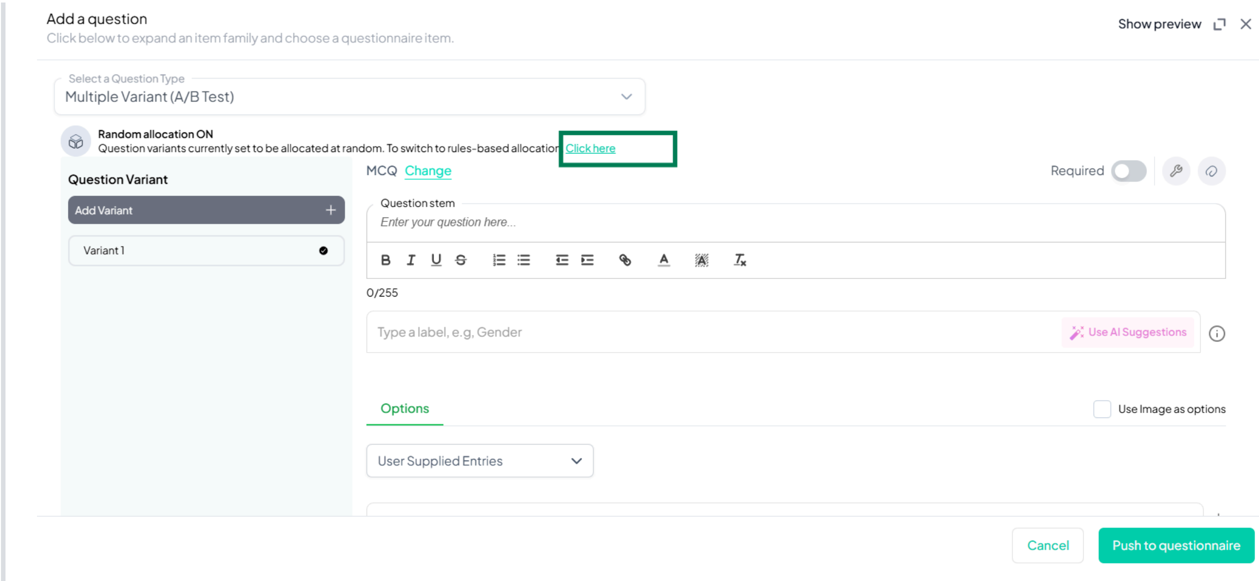
3. Configure the foundational question settings as required.

4. The Multiple Variant (A/B Test) question inherits all properties of the foundational question type.

Step 5: Configure Variant Allocation

Multiple Variant (A/B Test) questions can be used for both random and non-random allocation of variants. By default, participants are assigned randomly. To switch to rules-based allocation:

1. Set conditions for assigning variants.
2. Tap '**Click here**' to assign variants based on the set conditions.



3. Adjust the distribution ratio if needed (e.g., 50/50 split or custom percentages).

Step 6: Make the Question Required (Optional)

If you want to require participants to answer this question, toggle the **Required** switch at the top-right of the panel. This ensures respondents cannot proceed without answering the question.

Step 7: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here's how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, "View the media below, then answer the following question."

Preview Mode

Before finalizing the Multiple Variant (A/B Test) setup, it is important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Multiple Variant (A/B Test) setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

> **Question**
> View the image below then answer the question that follows:
>
> *Based on the packaging shown, how harmful do you think this tobacco product would be if smoked daily?*
>
> **Responses**
>
> - Not harmful at all
> - Slightly harmful
> - Somewhat harmful
> - Very harmful
> - Extremely harmful
>
> *[Note: Each participant will see only one randomly assigned question along with any associated media uploaded by the researcher. Unlike randomized*

> *trials where different media are randomized to a single fixed question, here, multiple question variants are created, and each participant is randomized to see only one question.]*

Additional Features:

- **Required:** No
- **Randomized Variant Distribution:** 50% each
- **Change foundational question:** Change the foundational question to an appropriate one for your Randomized Trial.
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

Value Proposition on the Chisquares Platform

Chisquares provides a powerful, streamlined system for implementing A/B tests within surveys. With random and rules-based variant allocation, media integration, and full compatibility with foundational question types, researchers can conduct sophisticated testing with ease.

Key platform-specific advantages include:

- **Multi-Variant Support**
  Create two or more question variants, each with unique content, wording, or media.

- **Random or Conditional Allocation**
  Distribute question variants randomly or based on custom logic (e.g., demographic filters).

- **Compatible with Foundational Question Types**
  Works with:
  - Single Value Text
  - Likert Scale
  - Multiple Choice (MCQ)
  - Sliding Scale
  - Yes/No
  - Multiple Responses
  - Dropdown
  - Prompts
- **Media Upload for Each Variant**
  Associate variant-specific images, videos, or audio clips to support testing goals.
- **Custom Variant Distribution Ratios**
  Adjust response allocation (e.g., 50/50, 70/30) depending on sample size or test design.
- **Edit and Preview Support**
  Visualize the user experience across all variants before deploying.
- **Clean Data Export with Variant Labeling**
  Track which variant each respondent saw to segment and analyze test results.

Conclusion

The A/B Test question type in Chisquares is a powerful tool for evaluating different question formats and optimizing survey engagement. By leveraging randomized assignment and performance tracking, users can refine their content based on real-time respondent data. Whether testing product descriptions, marketing messages, or survey wording, A/B Testing ensures data-driven decision-making for superior results.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / PIPED QUESTION

Introduction

The Piping Question Type in Chisquares allows survey creators to dynamically insert a respondent's previous answers into subsequent questions. This feature personalizes the survey experience, ensuring that follow-up questions are relevant based on earlier responses.

This manual provides a comprehensive guide to setting up and managing piping questions within Chisquares, covering basic setup, advanced features, and step-by-step instructions.

Features of Piped Questions in Chisquares

- **Personalized Follow-up:** Automatically pull in previous responses to customize future questions.
- **Multi-Question Dependency:** Requires at least two questions, where the second question (target) references responses from the first (source).

- **Mandatory Questions:** Both the source and target questions must be required.
- **Sequential Logic:** The source question must be positioned before the target question.
- **Fixed Question Order:** Piping requires survey questions to remain in a fixed order (no randomization allowed).
- **Integrity Checks:** If a source question is deleted or modified, the target question is flagged, preventing survey launch until resolved.
- **Piped Question Structure:** A piped question consists of four components:
  i. Initial part of the question stem.
  ii. Piped-in response.
  iii. Final part of the question stem (static or variable text per response).
  iv. Answer options.
- **Supported Question Types:** Piping can be used with categorical response types (Likert, MCQ, Yes/No, Dropdown) and text-based responses (Single Value Text and Sliding Scale).
- **Supported Answer Options:** Piped questions can collect responses using Likert scales, MCQs, Yes/No, Single Value Text (SVT), and multiple response questions.

Use Cases

The **Piping Question** type enables survey designers to personalize questions by inserting a respondent’s previous answers into the text of subsequent questions. This enhances contextual relevance and creates a more conversational flow, increasing respondent engagement and data accuracy.

Common use cases include:

- **Contextual Follow-Up**: Ask detailed questions based on previous responses.

Example: "Based on your answer that you live in an apartment, how often do you encounter secondhand smoke at home?"

- **Behavioral Tracking**: Tailor questions to user behavior or self-reported habits.
Example: "You indicated you exercise three times a week—what type of workouts do you typically engage in?"

- **Profile-Based Customization**: Reference demographics or preferences earlier in the survey.
Example: "As a 25–34-year-old, how do you view current financial planning resources?"

- **Health & Risk Assessment**: Generate tailored health risk or exposure questions.
Example: "Since you indicated smoking occasionally, have you tried to quit in the past 6 months?"

- **Customer Feedback**: Tailor queries based on previously selected services or products.
Example: "You selected 'Product A'—what could we improve about your experience with it?"

When to Use Piping Questions

Use Piping Questions when:

- You want to **dynamically insert respondent answers** into subsequent questions.
- Personalization is key to enhancing **survey relevance and respondent trust**.
- You are building a **conditional or logic-driven question flow**.
- You need **specific contextual continuity** across multiple survey sections.

- Reducing ambiguity or reminding respondents of their past input **improves data accuracy**.

Scenario-Based Example
In a public health survey, a participant previously answered that they live in "an apartment complex." The next question is piped:

> *"Based on your earlier response indicating that you live in an apartment complex, please tell us: In the past 30 days, on how many days did you notice someone smoking cigarettes close enough that you could smell the smoke in or around where you live?"*
> This increases the specificity and clarity of follow-up questions, helping to improve data precision.

Basic Setup

1. Question Stem

- Compose the base text for the question, leaving room for the inserted response.

2. Add Connector Response

- Choose a previous question to pull data from and insert into the new question dynamically.

3. Answer Options

- Define how respondents will interact with the question.

4. Required Setting

- Toggle to ensure the question must be answered before proceeding.

5. Add Media (Optional)

- Upload an image, video, or audio file (max 4MB) to support the question prompt.

Advanced Features

1. Multi-Layer Piping

- Pipe responses through multiple questions, creating a complex and intelligent survey flow.

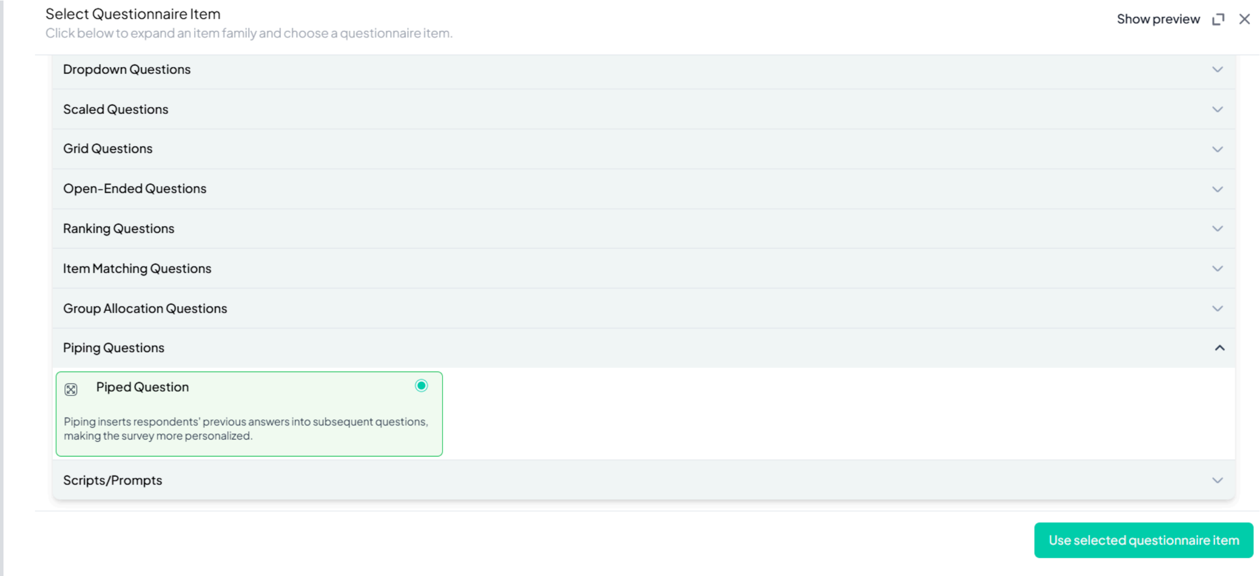
Step-by-Step Guide

Step 1: Create a New Question

1. Log into your **Chisquares Investigator Portal**.
2. Navigate to the **Survey Design** section.
3. Click **Create a New Question**.

Step 2: Select the Question Type

1. In the question type section, select **Piping Questions.**
2. Choose **Piped Question.**
3. Click **Use Selected questionnaire item.**

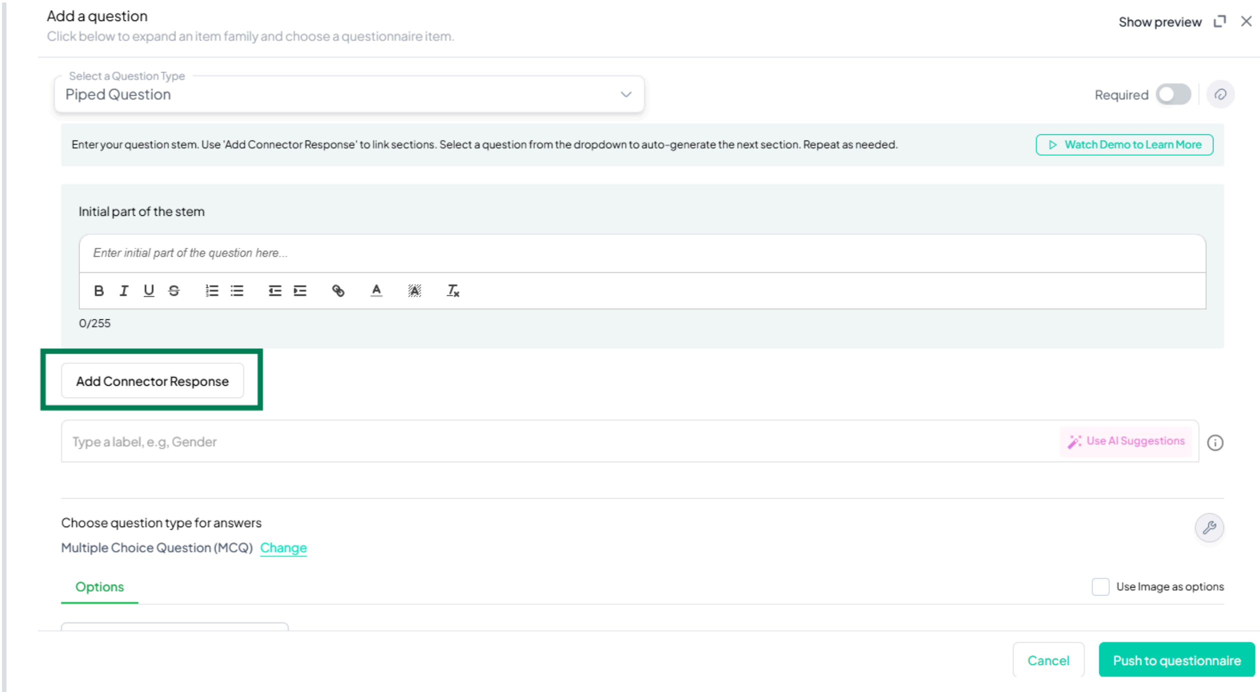


Step 3: Compose the Question Stem

1. Enter your question in the **Initial part of the stem** text box.

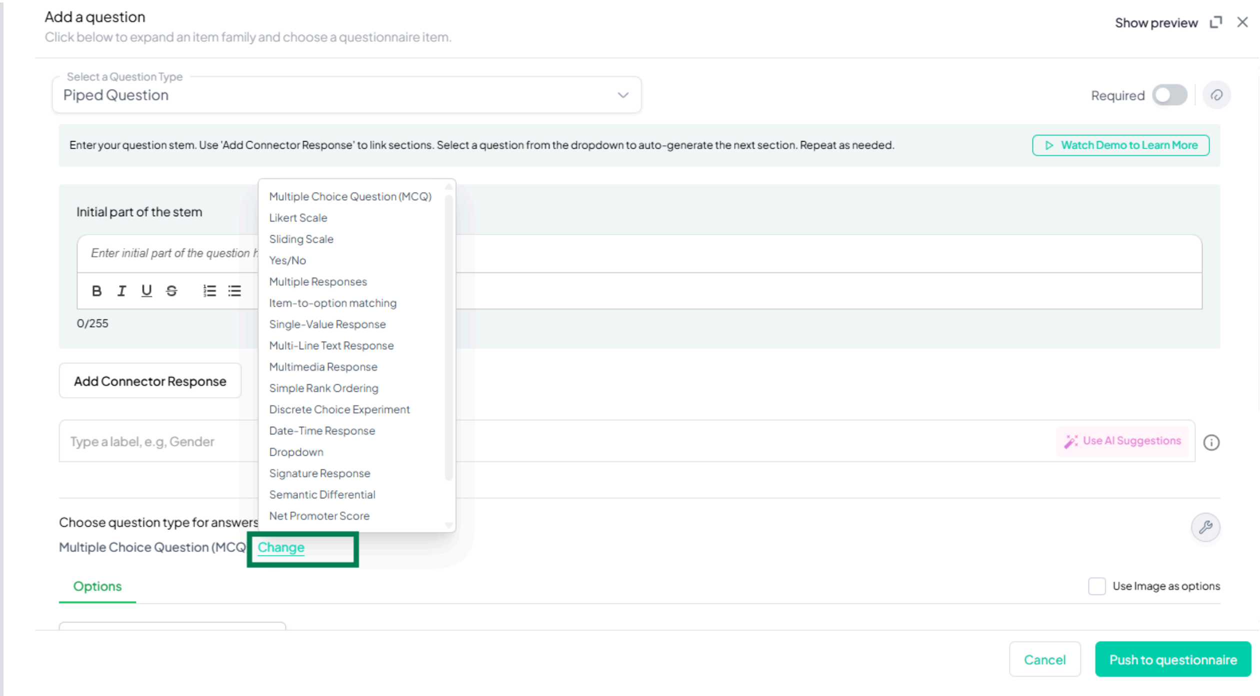
Step 4: Add Connector Response

1. Click **Add Connector Response.**
2. Select a previous question from the list to pipe response from.
3. The responses from the piped question are displayed. Enter the final part of the question stem in the **Continue part of the stem** box.
4. Check the box **use the same ending for all options**, or customize individual tailored endings for each piped response.



Step 5: Choose Answer Type

1. By default, **Multiple Choice Question (MCQ)** is selected. Click **Change** to switch to other question types.
2. Define answer **Options.**



Step 7: Add Media (Optional)

You can upload media (images, videos, or audio files) to accompany the question. Here’s how:

1. Click the **paperclip icon** at the top-right of the panel.
2. Upload your media file (must be under 4MB).
3. Once uploaded, choose the alignment for the media (left, right, or center). The default text overlay will say, “View the media below, then answer the following question.”

Preview Mode

Before finalizing the Piped Question setup, it is important to preview how it will appear to participants.

1. Click the **Preview** button to see the question as participants will view it.
2. Make sure all options, media, and settings look as expected.

Final Step: Push to Questionnaire

Once you are satisfied with your Piped Question setup:

1. Click **Push to Questionnaire** to add the question to your live survey.
2. If you need to make edits later, you can always return to the question editor to make changes.

Example Question Setup

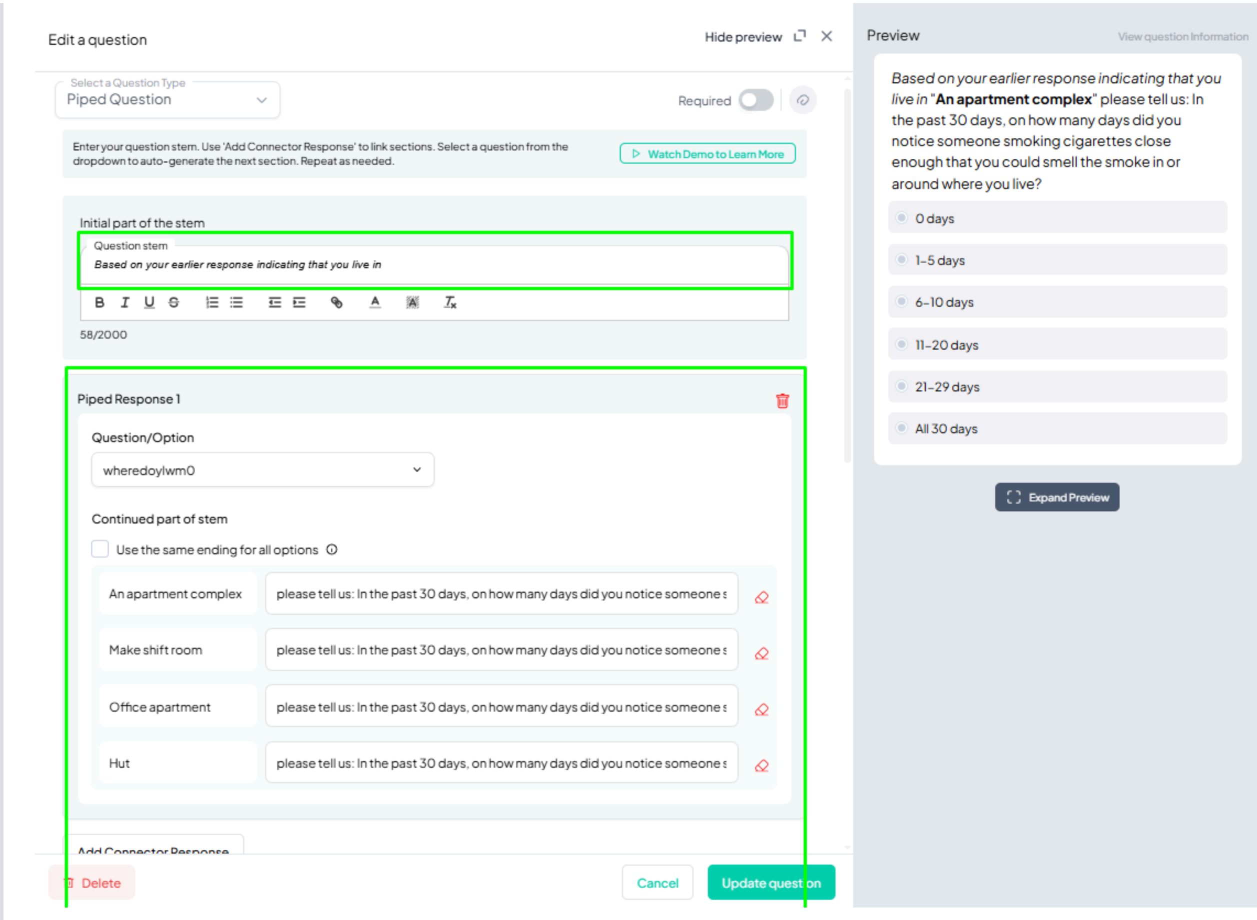
> **Question**
> **Initial part of the question stem:** *Based on your earlier response indicating that you live in*
>
> **Piped-in response:** *"An apartment complex"*
>
> **Final part of the question stem:** *please tell us: In the past 30 days, on how many days did you notice someone smoking cigarettes close enough that you could smell the smoke in or around where you live?*
>
> **Responses**
> 0 days
> 1-5 days
> 6-10 days
> 11-20 days
> 21-29 days
> All 30 days
>
> *[Note: Each participant's response to a prior question will be dynamically inserted into the stem of the current question for a more personalized experience. You will provide the stem text that appears before and after the inserted response in two separate text boxes. The source question for the*

> *piped responses will automatically be set as required to ensure responses are available for insertion.]*

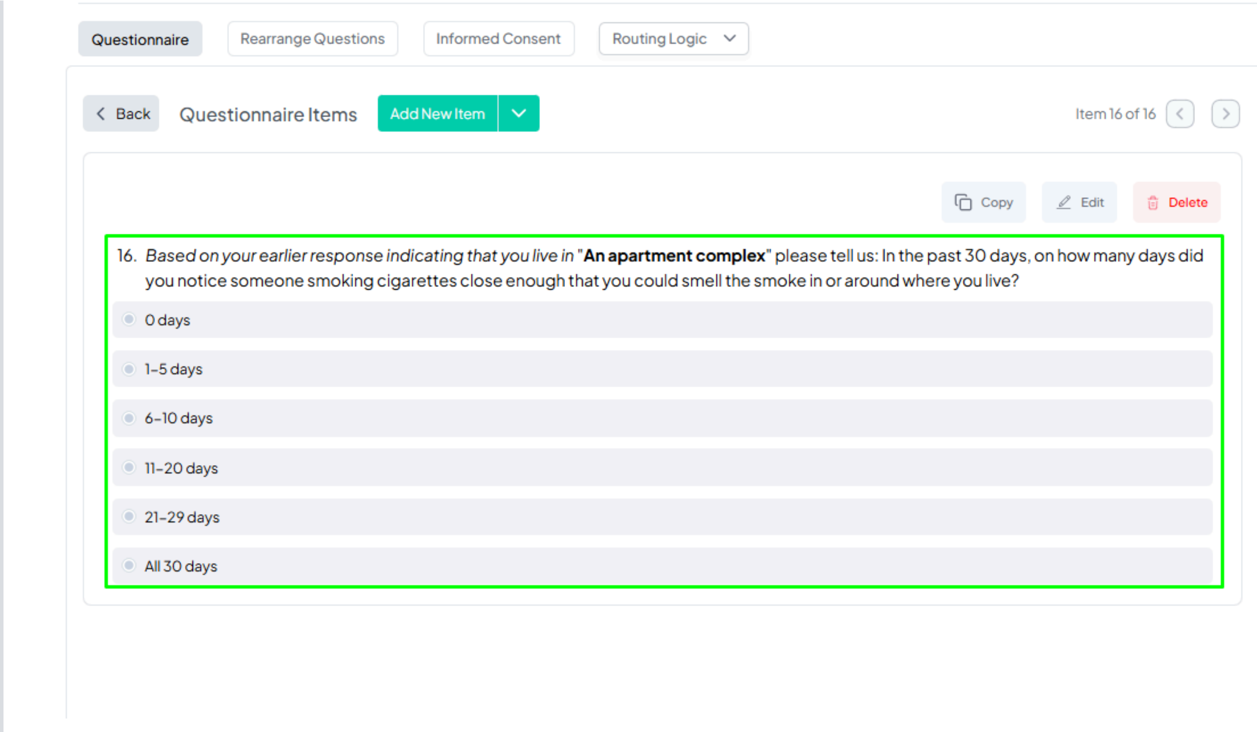
Additional Features:

- **Required:** No
- **Add Section Header (Optional):** Toggle this switch to add a section header to the question for context or grouping.
- **Add Footer Prompt (Optional):** Toggle this switch to include a closing note or prompt at the bottom of the question.

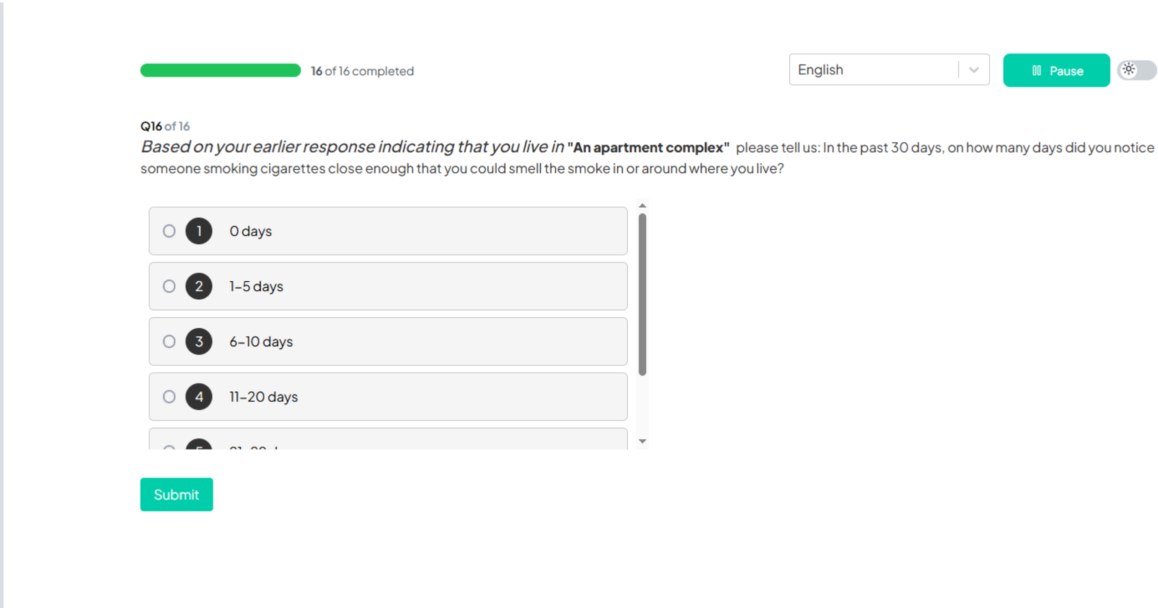
Piping Question Added



Piping Question Pushed Preview



Piping Question Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares provides a robust and user-friendly framework for piping, offering flexibility, structured logic, and data integrity across personalized survey flows.

Key platform-specific advantages include:

- **Multi-Format Piping**
  Supports piping of responses from:
  - **Single Value Text**
  - **Likert Scale**
  - **Multiple Choice (MCQ)**
  - **Yes/No**
  - **Dropdown**
  - **Sliding Scale**
- **Structured Stem Creation**
  Compose the question using:
  - **Initial part of the stem**
  - **Piped-in response**
  - **Final part of the stem (optional or tailored)**
- **Required Logic Enforcement**
  Automatically makes the source question required to ensure piping validity.
- **Multi-Question Dependency**
  Pipe from one source to multiple follow-ups or chain responses through several questions.
- **Fixed Survey Order**
  Enforces fixed sequencing to maintain logic and prevent randomized disconnections.

- **Response Integrity Checks**
  Alerts you if a source question is altered or deleted, preventing broken logic paths.

- **Randomization Disabled for Accuracy**
  Ensures piping maintains proper alignment and referencing.

- **AI-Assisted Labeling**
  Suggest labels based on piped content for better data management.

Conclusion

The Piping Question Type in Chisquares enhances survey personalization by dynamically referencing previous responses. By enforcing structured dependencies, validation rules, and response integrity, this feature ensures data consistency while improving respondent engagement. Follow this guide to implement piping effectively in your surveys.

To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Questionnaire / PROMPTS

Introduction

Prompts are an essential component of survey design on the Chisquares platform. They serve as predefined, customizable messages that guide participants through various stages of the survey. From introducing the survey to thanking participants or delivering incentive instructions, prompts enhance the respondent experience and ensure smooth navigation and engagement.

This manual will guide you through the process of setting up and managing Prompts on Chisquares, covering all available prompt types, formatting tools, and publishing options.

Features of Prompts in Chisquares

- **Multi-Type Prompt System**: Choose from various prompt types such as Header, Closing, Incentive, Custom, Quota, Exit, and Footer.
- **Formatted Rich Text Editor**: Customize prompts using bold, italics, lists, links, and other formatting tools.

- **Character Count Management**: Visual indicator for remaining characters (e.g., 70/350 characters used).
- **Live Preview**: Instantly preview how prompts will appear to respondents.
- **Dynamic Prompt Selection**: Switch between prompt types without leaving the interface.

Use Cases

Prompts are non-question text blocks used to guide, inform, or acknowledge participants throughout the survey experience. They serve as contextual anchors that improve navigation, manage expectations, and personalize the respondent journey.

Common use cases include:

- **Survey Introduction**: Provide background, instructions, or consent messaging.
  Example: "Welcome! This survey is about your opinions on consumer technology."

- **Thank You Message**: Close the survey with appreciation or redirect instructions.
  Example: "Thank you for your time! Your input has been recorded."

- **Incentive Notification**: Inform participants how to receive a reward or follow-up message.
  Example: "Your gift card code will be sent to your email within 48 hours."

- **Quota & Exit Messages**: Display messages when a quota is full or the participant is screened out.
  Example: "We've reached our limit for this group—thank you for your interest."

- **Section Transitions**: Break up longer surveys with friendly interstitial content.
  Example: “Great job! Let’s move on to a few final questions about your daily habits.”

When to Use Prompts

Use Prompts when:

- You need to **orient or guide participants** without collecting a response.
- Specific **transitions or disclaimers** are required in your survey flow.
- You want to maintain **engagement and clarity** by setting expectations.
- You’re managing logic flows that require **feedback or informative text** for disqualified respondents.
- Providing **incentive instructions or legal disclaimers** is necessary at the end or during the survey.

Scenario-Based Example
In a brand perception survey, a **Header Prompt** welcomes participants and sets expectations:

> *“Welcome to our quick 5-minute survey. You’ll be asked about your experiences with tech brands. There are no right or wrong answers—just your honest opinions!”*
> Later, a **Closing Prompt** thanks them and confirms their entry into a prize draw.

Prompt Types Available

- **Header Prompt**: Shown at the beginning of the survey to welcome and orient participants.

- **Closing Prompt**: Provides closure and thanks participants upon completing the survey.
- **Incentive Prompt**: Details how participants can claim their incentives or rewards.
- **Custom Prompt**: Fully customizable message placed at any stage of the survey.
- **Quota Prompt**: Displays when a participant is screened out due to quota fulfillment.
- **Exit Prompt**: Shows when participants leave the survey early or are disqualified.
- **Footer Prompt**: Final note or disclaimer shown at the bottom of the survey interface.

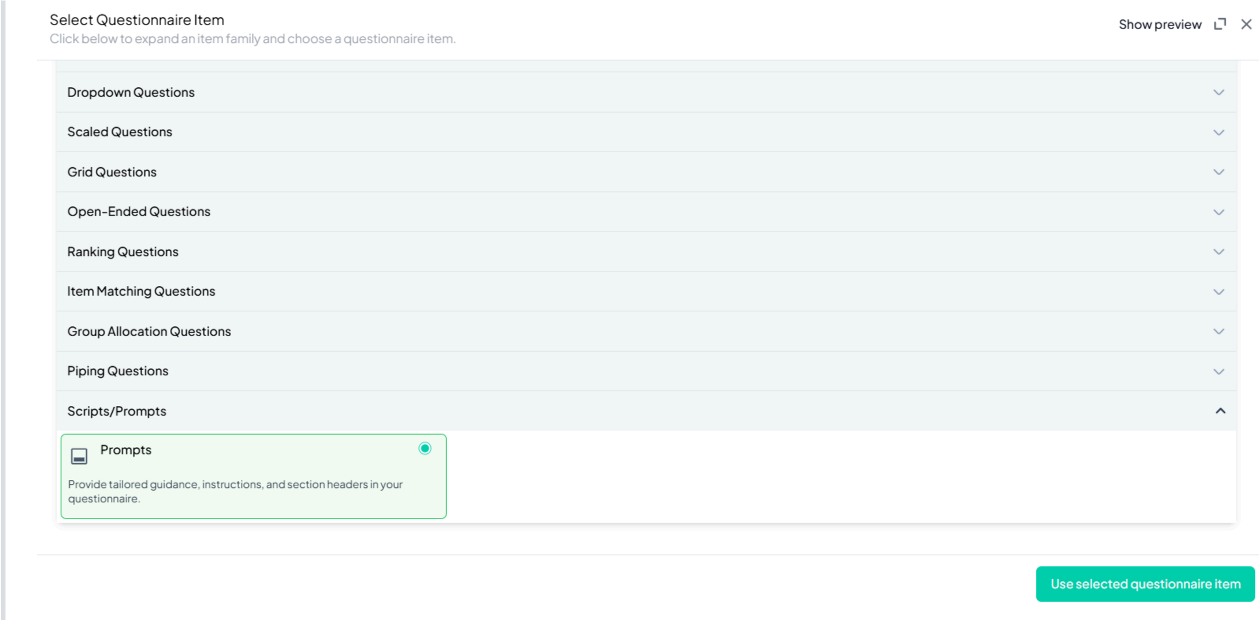
Step-by-Step Guide

Step 1: Create a New Question

1. Log into your **Chisquares Investigator Portal**.
2. Navigate to the **Survey Design** section.
3. Click **Create a New Question**.

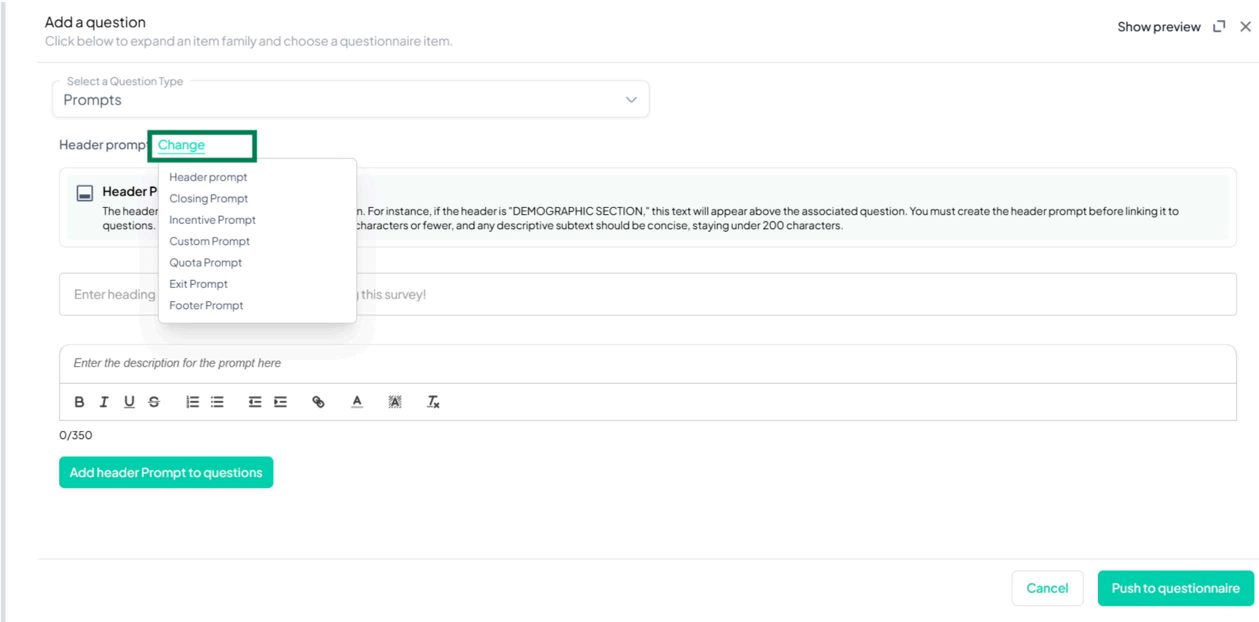
Step 2: Select the Question Type

1. In the question type section, select **Scripts/Prompts**
2. Click **Prompts.**
3. Click **Use Selected questionnaire item.**



Step 3: Choose the Prompt Type

1. In the prompt block, click **Change** next to the prompt type label.
2. Select from the dropdown menu: Header, Closing, Incentive, etc.



Step 4: Enter Prompt Title

1. Provide a concise title for your prompt.

Step 5: Write Prompt Message

1. Enter your message in the rich text editor provided below the title.
2. Use formatting tools as needed (bold, italic, bullets, alignment, links, etc.).

Step 6: Review character Count

1. Keep track of the character count indicator below the editor.
2. Ensure your message stays within the limit.

Step 7: Preview the Prompt

1. Click **Show preview** at the top right to see exactly how your prompt will appear to participants.

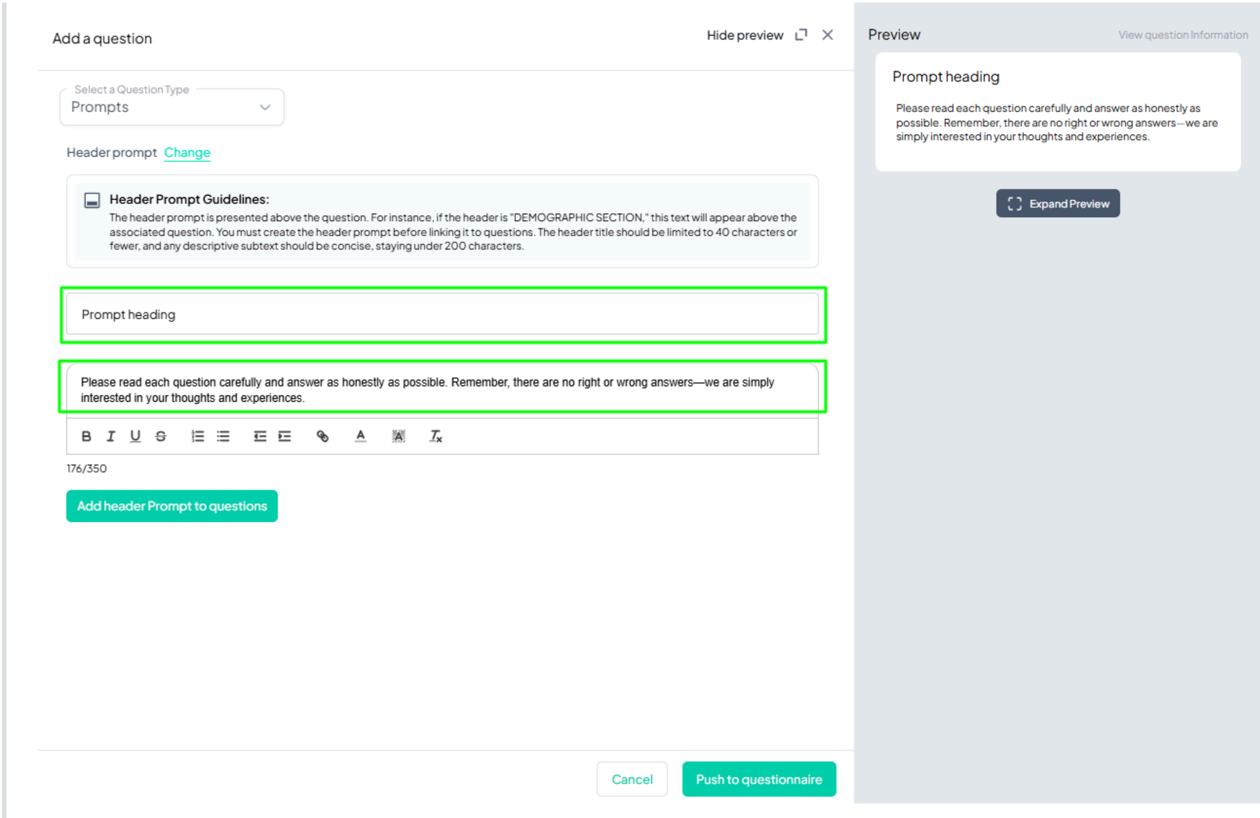
Step 8: Finalize and Save

1. Once satisfied, click **Push to Questionnaire** to apply the prompt to your survey questionnaire.
2. If needed, you can edit or replace the prompt later by navigating back to the same section.

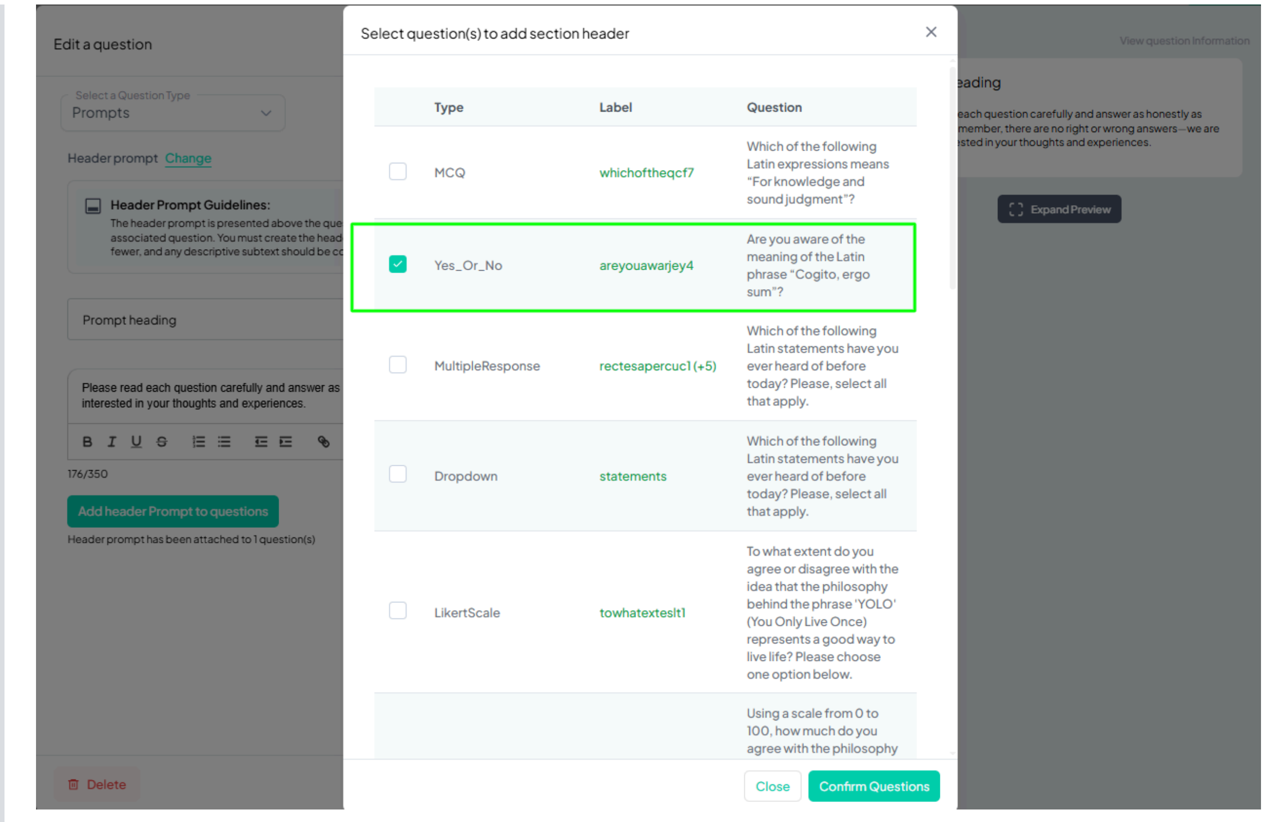
Example Question Setup

> **Question** > *Please read each question carefully and answer as honestly as possible. Remember, there are no right or wrong answers—we are simply interested in your thoughts and experiences.*

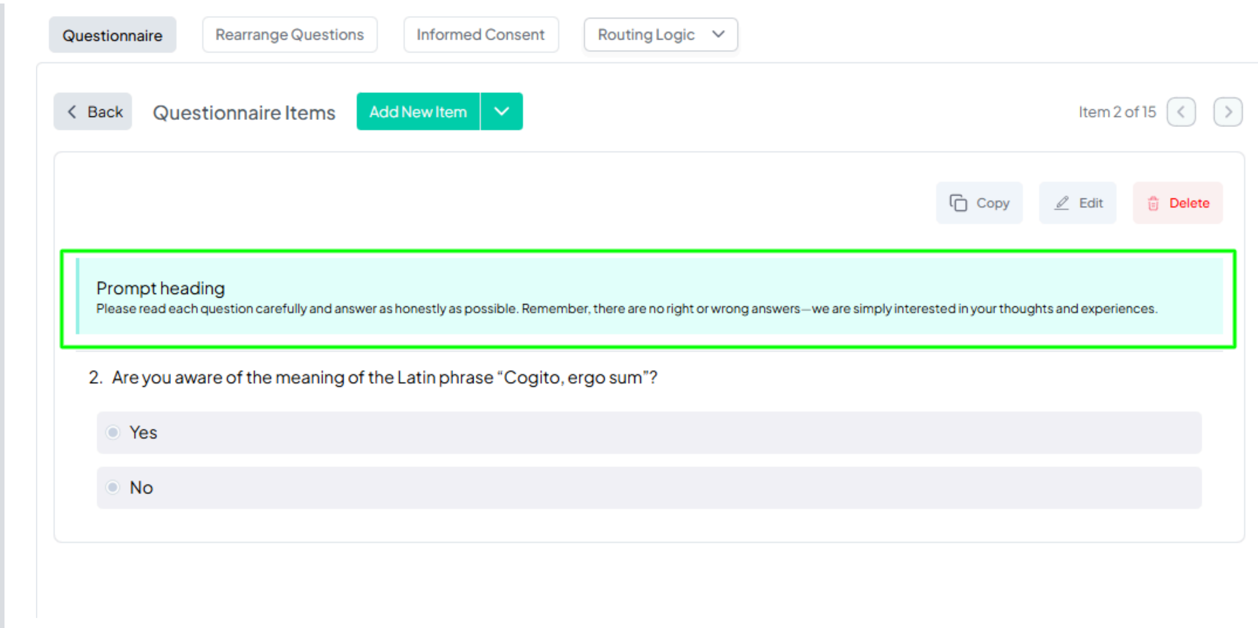
Prompts Added



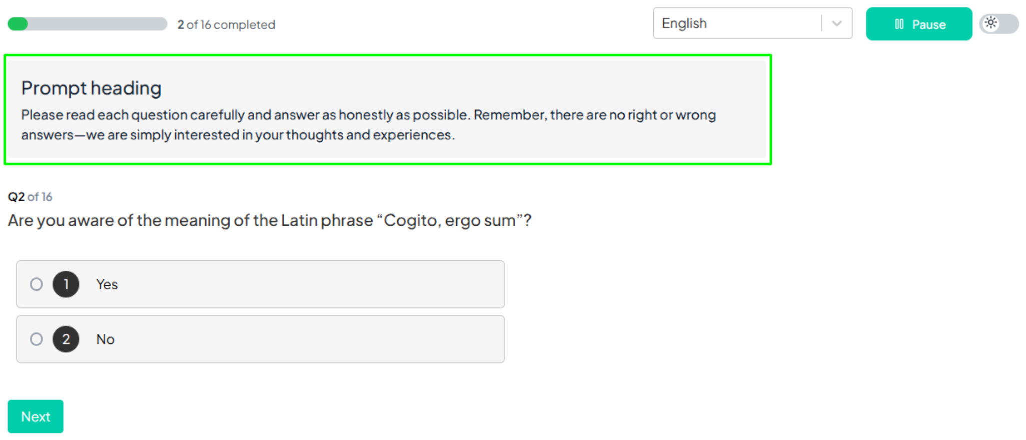
Prompts Added to a Sample Question (Yes/No Question)



Prompts Pushed Preview



Prompts Appearance on the Participant Portal



Value Proposition on the Chisquares Platform

Chisquares offers a highly customizable and intuitive prompt system that allows researchers to **communicate effectively with participants** across all stages of a survey. With structured formatting tools, flexible placement, and real-time previews, prompts help create a polished, professional, and respondent-friendly experience.

Key platform-specific advantages include:

- **Seven Prompt Types**
    - **Header Prompt** – Introduction or consent message
    - **Closing Prompt** – End-of-survey acknowledgment
    - **Incentive Prompt** – Reward or follow-up info
    - **Custom Prompt** – Freely placed informative content
    - **Quota Prompt** – Displayed when quotas are met
    - **Exit Prompt** – For disqualified or early exits

    - **Footer Prompt** – Final disclaimer or survey footer

- **Rich Text Editor**
  Format content using bold, italic, bullet lists, hyperlinks, alignments, and more.

- **Live Preview Functionality**
  See exactly how prompts will render before publishing.

- **Character Counter**
  Visual character tracker to manage prompt length and readability.

- **Dynamic Switching**
  Seamlessly toggle between prompt types without re-creating content.

- **Fixed Display Logic**
  Prompts are not randomized—ensuring consistent experience for all respondents.

- **Reusable Messaging**
  Edit or reuse prompt templates across different projects.

Conclusion

Chisquares provides a powerful and flexible prompt system to enhance survey flow and ensure smooth participant navigation. By following this guide, users can effectively implement and manage prompts to optimize their data collection process.

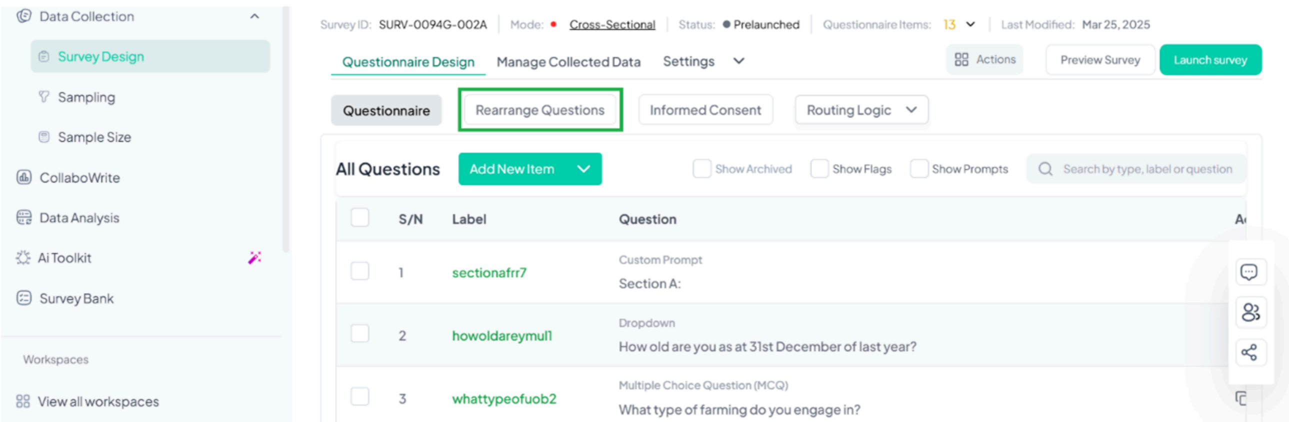
To watch a video of this question being set up, click the link below: link

Getting Started / Data Collection / Survey Design / Questionnaire Design / Rearrange Questions

The Rearrange Questions feature allows users to modify the order of questions or prompts in a survey for improved flow and clarity.

Steps to Rearrange Questions:

1. Navigate to Survey Design
2. Access Rearrangement Options



3. Click on “Rearrange Questions”.

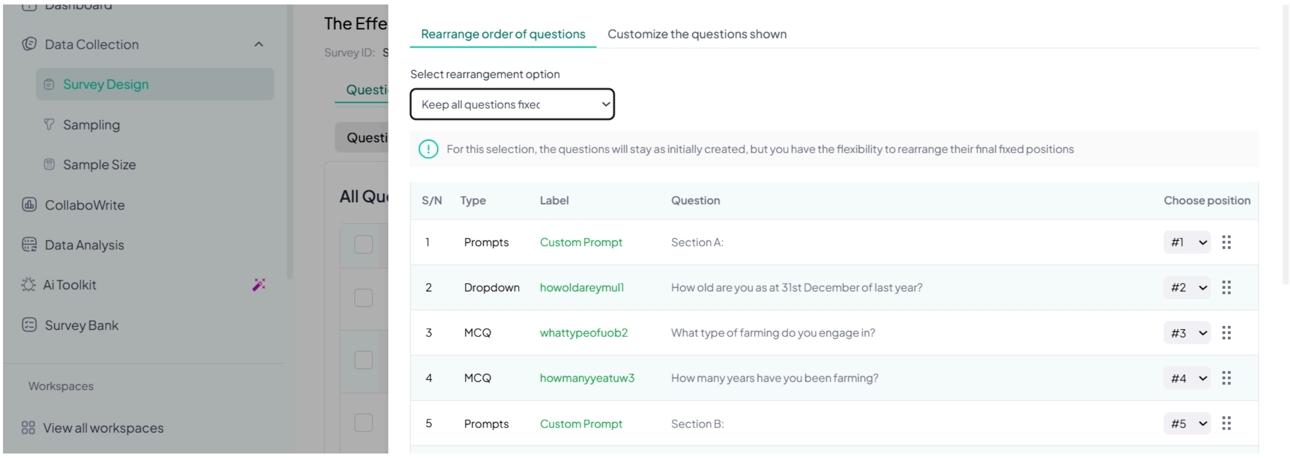
Rearrange Order of Questions

Under the 'Rearrange Order of Questions' tab, you can choose your preferred method for organizing survey questions. Available options include:

- Keeping all questions fixed in their original order,
- Shuffling all questions randomly,
- Fixing specific questions while allowing others to be shuffled.

Each question is displayed with its current serial number, label, and question text. To modify the order of questions:

- Use the “Choose Position” dropdown to assign a new position number, or
- Drag and drop questions manually using the designated icon.



Save Changes

Once you are satisfied with the new question or script order, the changes will automatically be reflected in the questionnaire preview. Next, click on 'Save Selection' to confirm and apply the updated question order.

Customize the questions shown

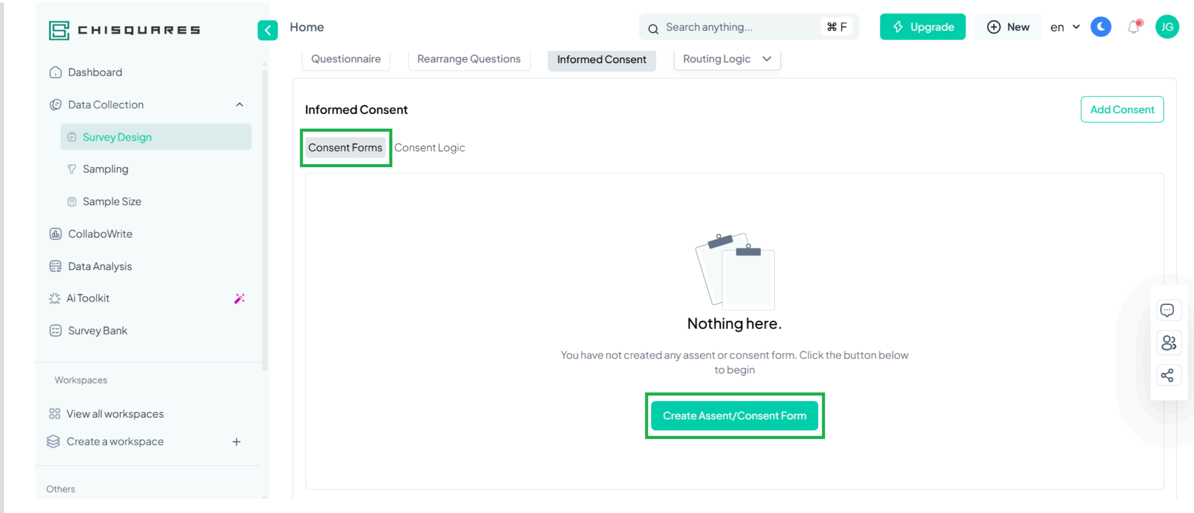
Under this tab, the researcher can select which questions to display for the baseline or any available waves. This feature is particularly useful for longitudinal studies.

Getting Started / Data Collection / Survey Design / Questionnaire Design / Consent Form

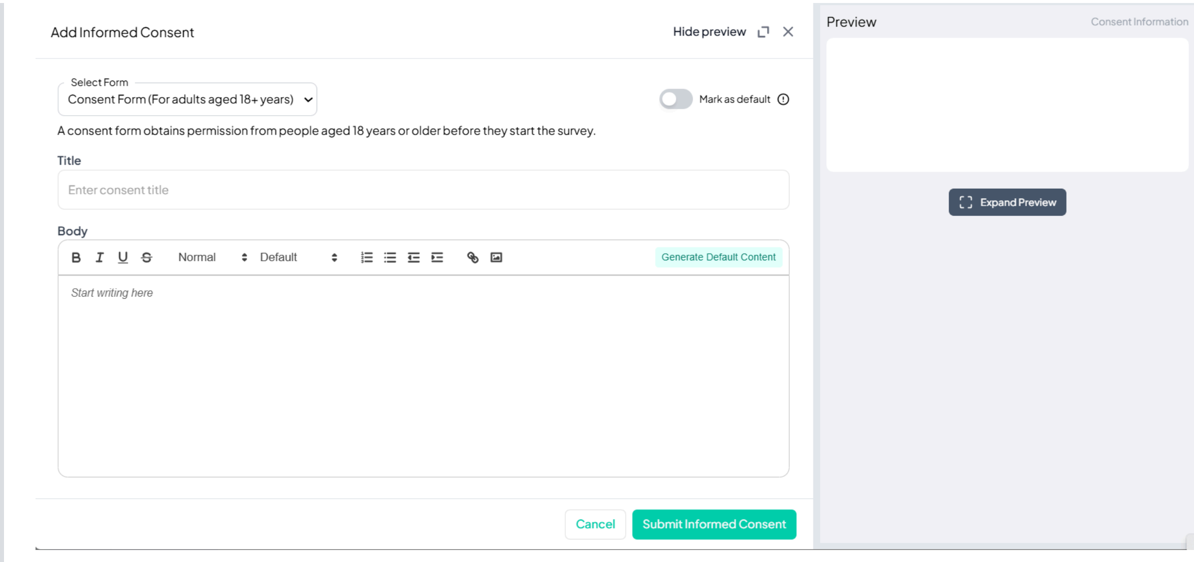
A consent/assent form is a document used to obtain permission from individuals before involving them in a study, survey, or research project. Consent forms are signed by adults who can legally provide informed permission, while assent forms are used for minors or individuals not legally able to consent independently—they express agreement alongside a guardian's consent. These forms clearly explain the purpose, procedures, potential risks, and participant rights to ensure voluntary and informed participation. The Chisquares platform strictly adheres to these formal ethical standards, ensuring that all data collection activities respect participant autonomy and comply with regulatory and institutional requirements.

Procedures for getting consent/assent forms on the Chisquares platform

- Navigate to the Survey Design section and open the relevant survey.
- Select the Informed Consent tab.
- Click on the Consent Form tab.



- Click "Create Consent/Assent Form."
- The Add Informed Consent Form dialog box will appear.



This box is designed for creating and managing consent and assent forms. It allows survey creators to design and submit a consent form required before participants begin a survey.

Use the dropdown arrow to specify whether you are preparing a consent or assent form. Next, enter the title of the form and compose the content in the body section provided. Alternatively, you can generate a default form by clicking the "Generate Default Content" button.

Mark as default

When toggled on, the Mark as Default option designates the form as the default consent form. This ensures that if multiple consent forms are configured with conditional routing and a participant does not meet any of the specified conditions, the default form will be presented. After configuring these settings, the survey creator can click "Submit Informed Consent" to save and apply the form.

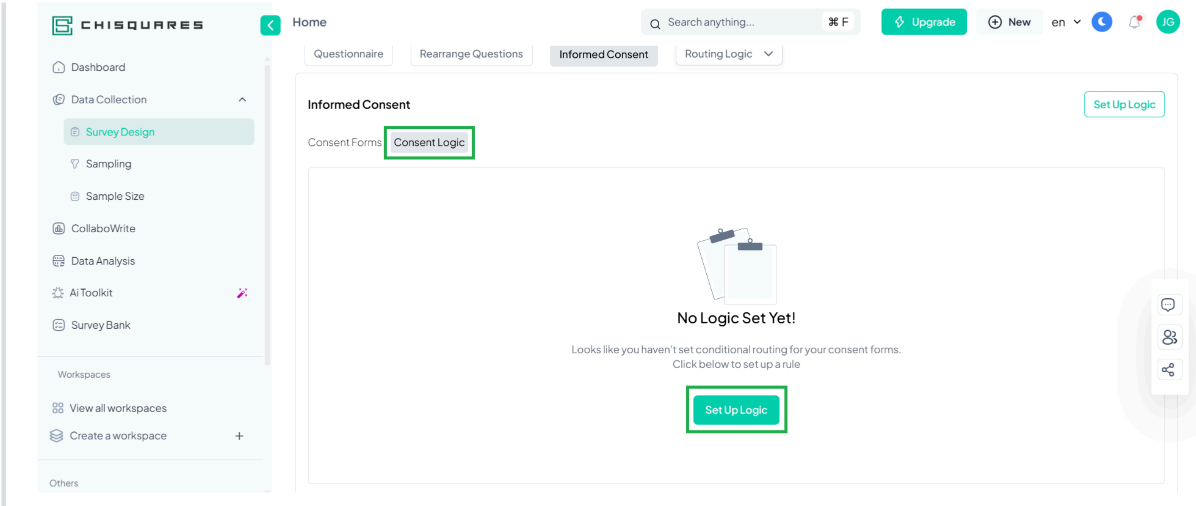
Consent Logic

Consent logic refers to a set of rules or conditions used to determine which consent or assent form is displayed to a participant during a survey or study. It enables survey creators to present different forms based on specific criteria or participant responses. On the Chisquares platform, consent logic ensures that each participant receives the most appropriate and legally compliant form according to their profile or input. This functionality supports the enforcement of ethical standards and regulatory compliance throughout the data collection process. To activate consent logic, multiple consent or assent forms must be created, allowing the system to apply conditional routing based on predefined criteria.

Steps to activating consent logic.

- Navigate to the Survey Design section and open the relevant survey.
- Select the Informed Consent tab.

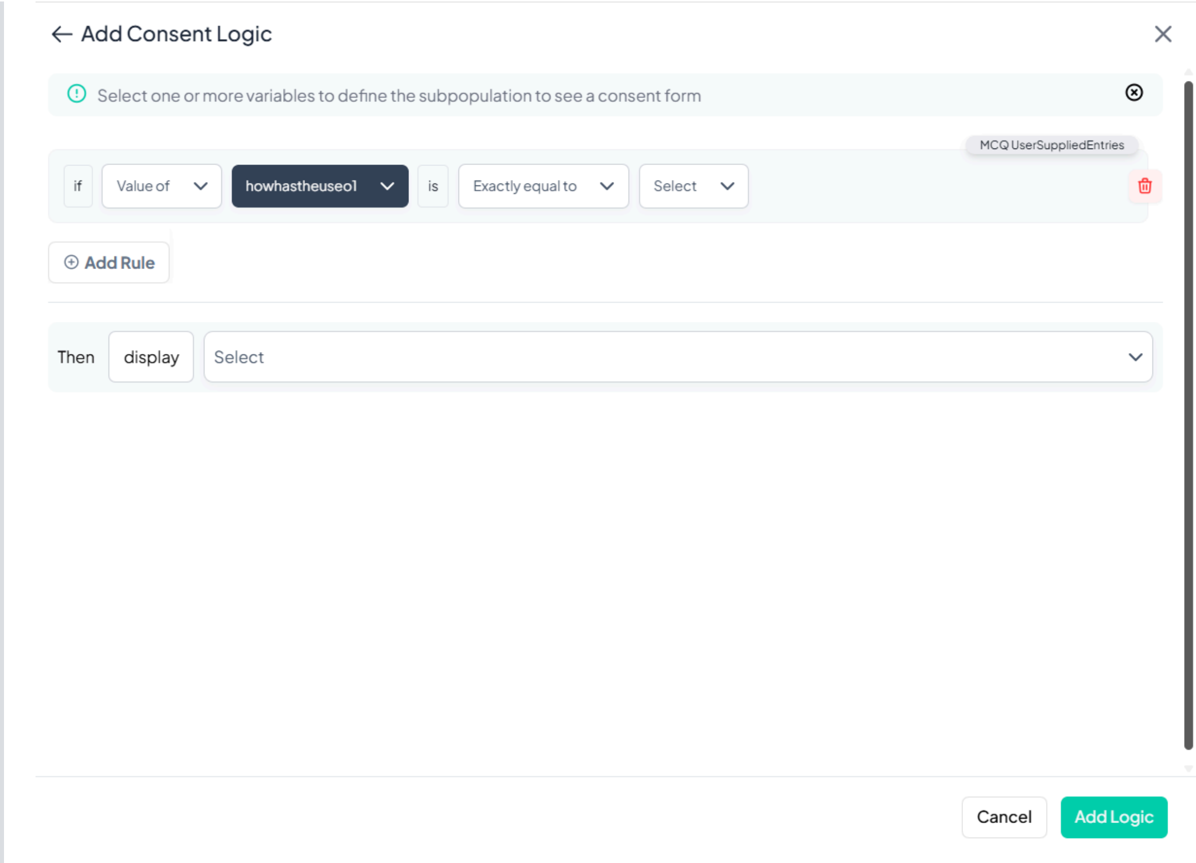
- Click on the Consent Logic tab.



- Click "Set up logic”

- Next, click on add variable(s) to specify the variable for deciding the criteria for routing

- Select the question(s) and choose “done selecting”



The Add Consent Logic interface allows survey creators to build conditional rules that determine which consent or assent form is shown to a participant. This interface includes a Conditional Rule Builder, which supports a variety of operators such as:

- Exactly equal to
- Not equal to
- Containing any of
- Containing all of
- Containing none of
- Was viewed

- Was answered
- Starting with
- Ending with

Beneath the condition setup, the Action Logic section provides a "Then display" option, where a specific consent form can be selected for display if the defined condition is met. Controls such as Add Rule and Add Logic are available to manage and expand logic entries effectively.

Getting Started / Data Collection / Survey Design / Questionnaire Design / Routing Logic

Survey Logic in Chisquares

The Survey Logic feature in Chisquares empowers researchers to design dynamic, adaptive surveys by customizing the flow of questions based on participant responses. This functionality ensures a personalized and efficient survey experience for each respondent, improving both data quality and respondent engagement.

Types of Routing Logic

Chisquares supports the following types of logic under the Flow Logic tab:

- Inclusion Criteria – Grants access to the survey only to participants who meet specified conditions or belong to defined subgroups.
- Exclusion Criteria – Restricts access to participants who do not meet certain conditions or are part of excluded subgroups.
- Skip Pattern – Directs participants through specific survey paths based on their responses or subgroup classification.

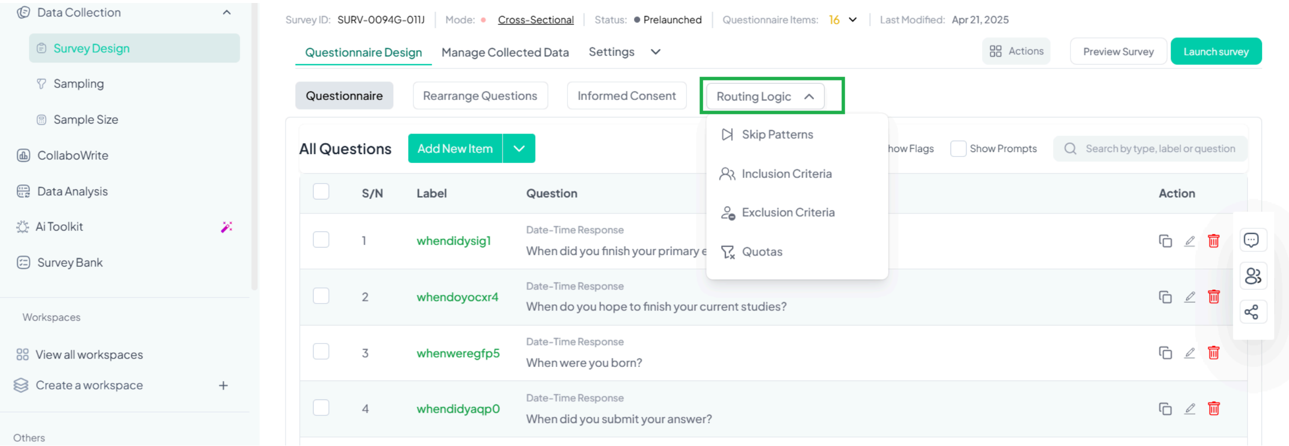
- Quota – Limits the number of participants permitted within each defined subgroup.

How to Add Routing Logic

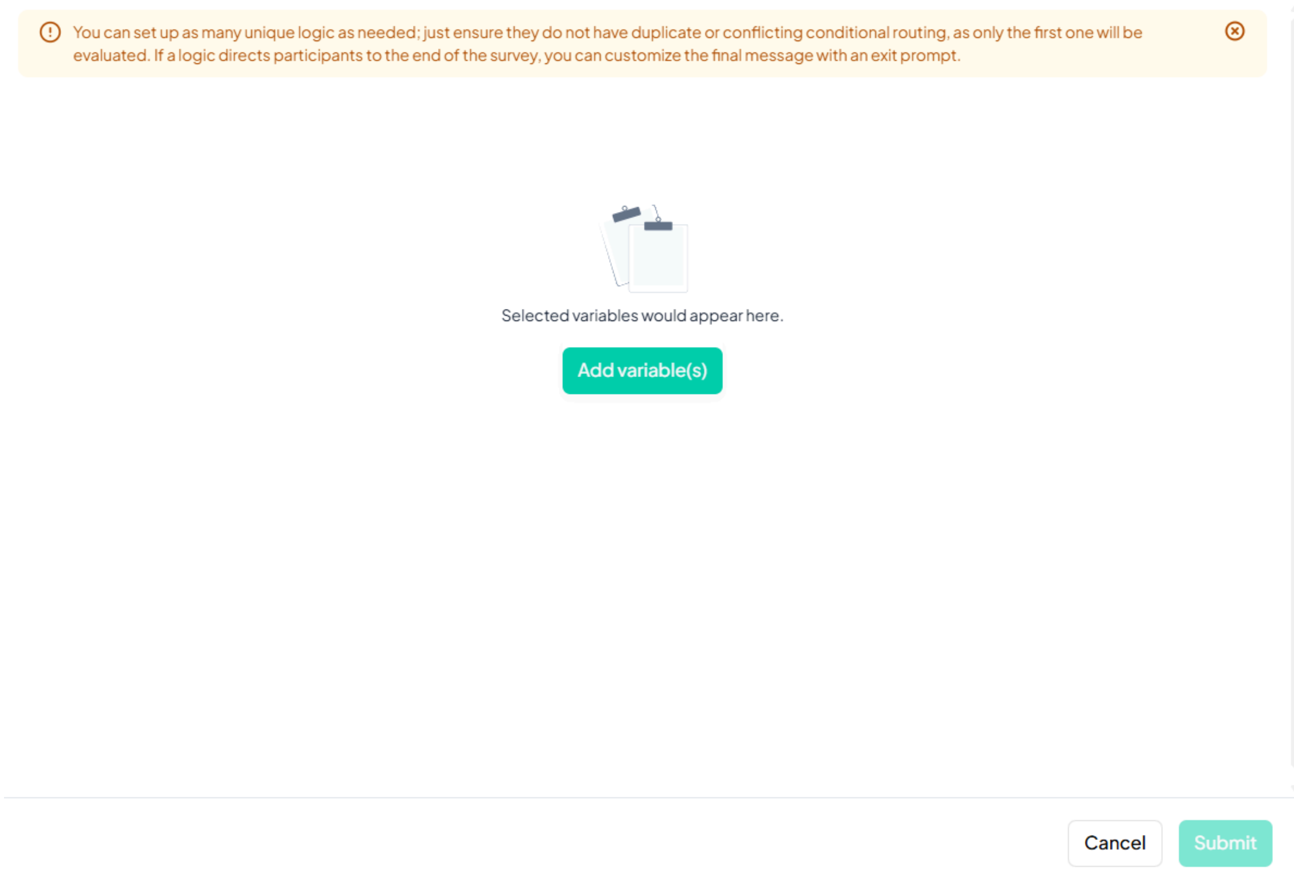
Step 1: Navigate to Survey Design

Select the survey in which you wish to apply logic.

Step 2: Access the Logic Menu Click the dropdown arrow on the “Routine logic” tab and select the desired logic.



Step 3: Add New Logic Irrespective of the desired logic, click on “add new logic” to begin



Step 4: Select Variables Click "Add variable(s)" to choose survey questions that will serve as the basis for your logic conditions.

Step 5: Choose a Question(s) From the list of available questions, select the desired item(s), then click "Done selecting."

Step 6: Build Logic Conditions The “Survey Logic Builder” interface will open, where you can define rules using conditional logic.

Available condition operators include: Exactly equal to

Not equal to

Containing any of / all of / none of

Was viewed / Was answered

Starting with

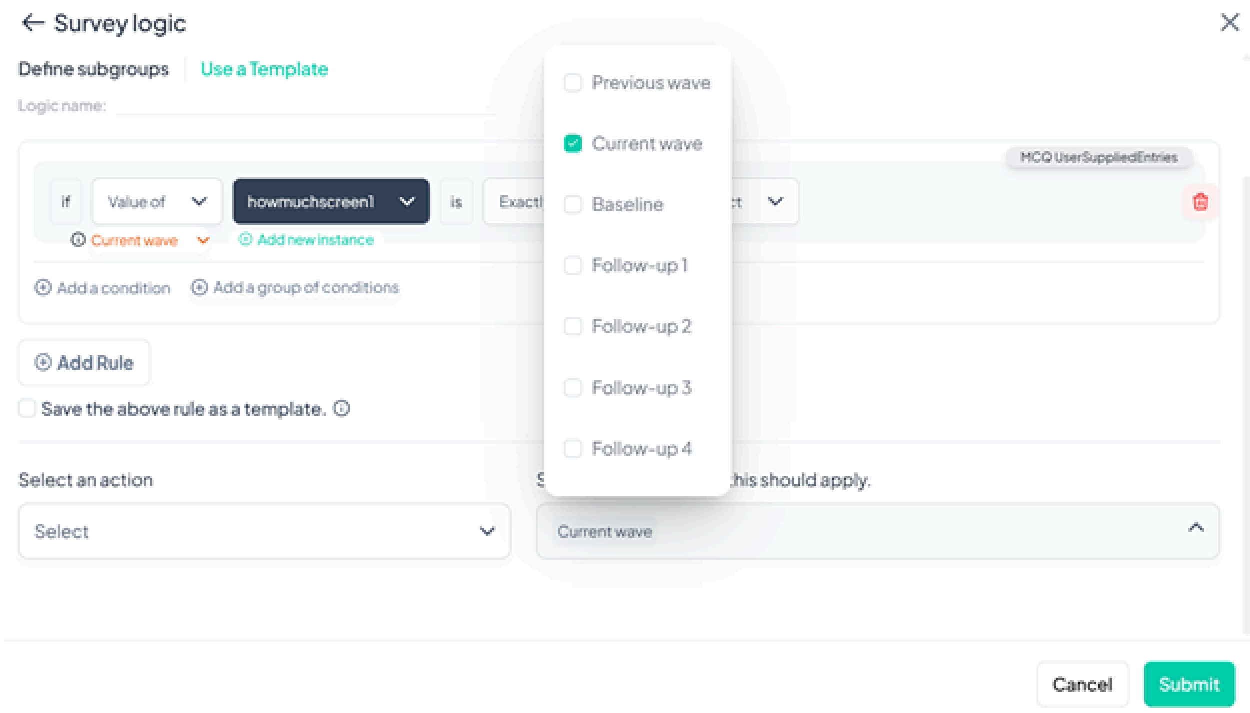
These operators provide granular control over how participants progress through the survey. Based on the defined conditions, specific actions can be triggered, such as:

- Skipping or displaying certain questions
- Ending the survey for targeted subgroups
- Displaying customized follow-up content

This logic framework enhances flexibility and ensures that each participant follows a relevant and streamlined survey path.

Step 7: Define the Wave of Application

You can also specify the survey wave in which the logic should be applied.



Options include:

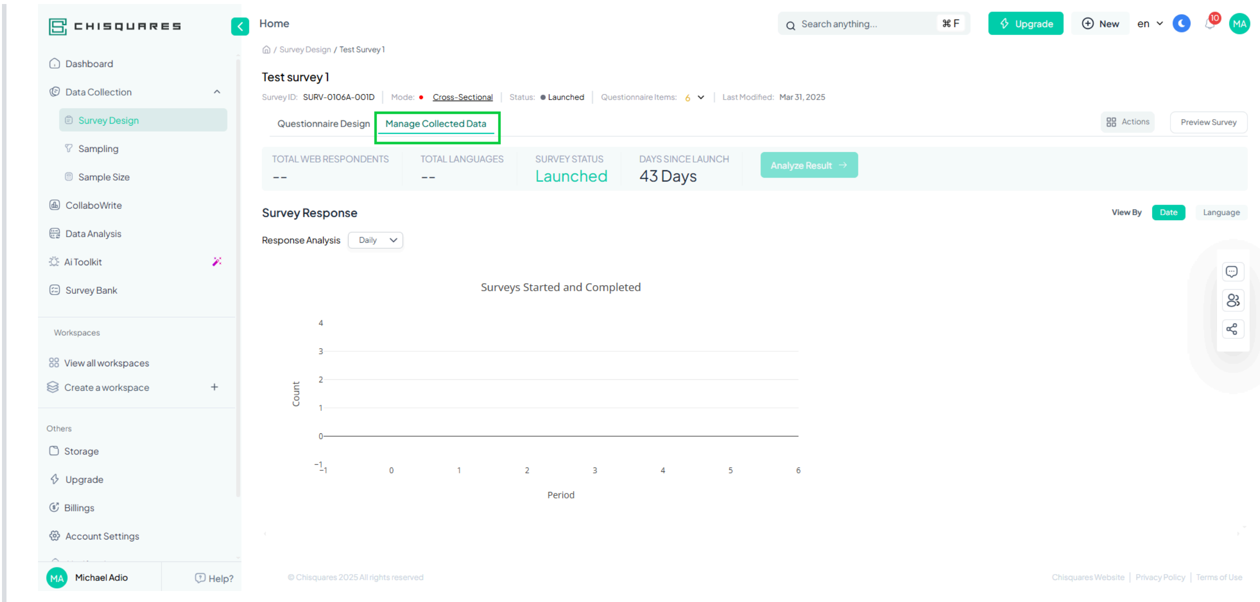
- Previous wave
- Current wave (default)
- Baseline
- Follow-up 1 to 4

This is especially valuable for longitudinal or multi-phase studies, allowing you to apply logic rules uniquely at each data collection stage. For example, a rule can be configured to apply only during a follow-up round, enabling your survey to adapt dynamically over time.

Getting Started / Data Collection / Survey Design / Manage Collected Data

The **"Manage Collected Data"** tab in the Survey Design module of the Chisquares platform provides a comprehensive overview and real-time insights into your survey's progress, status, and response patterns. This feature is crucial for monitoring participation, evaluating multilingual response dynamics, and preparing your data for analysis.

This documentation outlines each component and how to use it effectively.



Interface Overview

When the **"Manage Collected Data"** tab is selected, the following key information and tools are displayed:

1. TOTAL WEB RESPONDENTS

- **Definition**: Displays the cumulative number of survey responses received through the web.
- **Function**: This count updates in real time, allowing you to monitor participation as it happens.

2. TOTAL LANGUAGES

- **Definition**: Shows the number of languages into which the survey has been translated.
- **Function**: Helps track the inclusivity and linguistic reach of your survey.

3. SURVEY STATUS

- **States**:
  - **Launched** – The survey is currently live and collecting data.
  - **Pre-Launched** – The survey has been prepared but has not yet been made available to respondents.
  - **Paused** – Data collection is temporarily suspended.
- **Function**: Enables quick identification of the operational state of the survey.

4. DAYS SINCE LAUNCH

- **Definition**: Indicates the number of days that have passed since the survey was made live.

- **Function**: Useful for evaluating response trends over time and for campaign tracking.

5. Analyze Result (Button)

- **Action**: Redirect the user to the **Data Analysis Module**.
- **Purpose**: Allows users to perform detailed analysis of the collected data, derive insights, visualize patterns, and generate analytical reports.

Survey Response Visualization

Default Display

- The platform shows a graphical representation of survey responses by **date**, offering a timeline of data collection.

Dropdown: Response Analysis

- **Options**:
  - **Daily** (default): Visualizes how many responses were collected each day.
  - **Weekly**: Groups and displays response counts by week for higher-level trends.

View By:

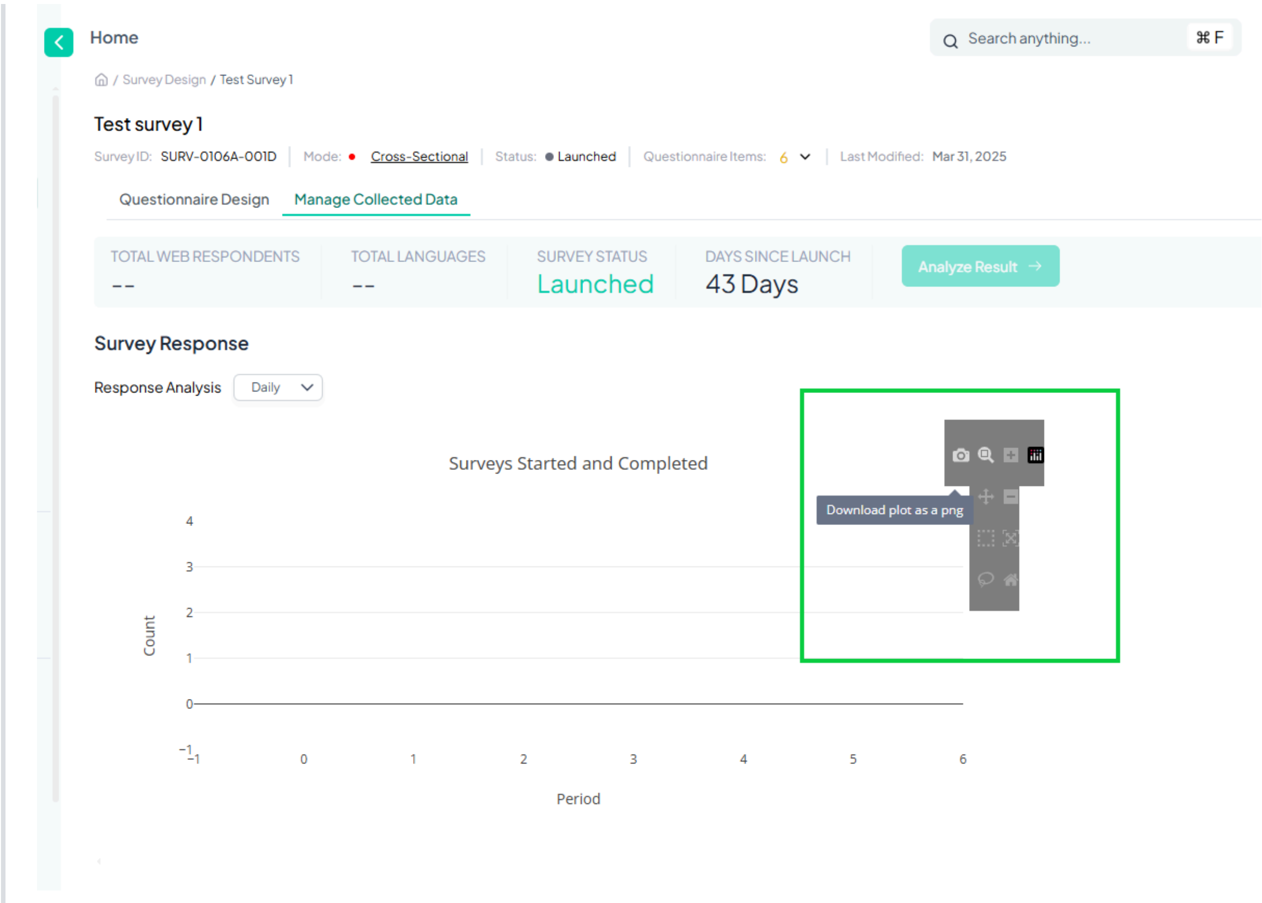
- **Date (Button)**:

  - Displays response trends across the duration of the survey in chronological order.

- **Language (Button)**:
  - Allows the user to view responses by the language in which they were submitted.
  - Provides insight into language-specific engagement and performance.

Interactive Graph Tools

When hovering over the graphical plots, an interactive toolbar appears with the following tools powered by Plotly.js (v2.35.3):



- **Download plot as a PNG**: Save the current visualization as an image for reports or offline analysis.

- **Zoom / Zoom in / Zoom out**: Adjust the focus area of the chart for detailed inspection.
- **Pan**: Move the viewable area of the graph to observe different data sections.
- **Box Select**: Draw a box to select and zoom in on a specific subset of data.
- **Lasso Select**: Freehand-select specific data points on the graph.
- **Autoscale**: Automatically resizes the chart to fit all data.
- **Reset Axes**: Returns the visualization to its original state.

These visualization tools enhance user control and exploration of response data, supporting clearer, data-driven decisions.

Summary

The **"Manage Collected Data"** tab is designed to provide real-time feedback and graphical insights into your survey's performance. It serves as the bridge between data collection and analysis, allowing you to:

- Track participation across time and languages
- Assess the survey status at a glance
- Quickly navigate to data analysis
- Explore collected data visually with professional plotting tools

This feature ensures that users—from novice researchers to advanced analysts—can effectively manage and interpret their survey data within the Chisquares platform.

Getting Started / Data Collection / Survey Design / Settings / Survey Title, Aims, and Other Info

The **Survey Information** section on the **Chisquares** platform allows users to define key metadata about their surveys, including the title, location, aims, and sensitive data considerations. Properly filling out this section ensures clarity, compliance, and effective data collection.

Prerequisites
Ensure the following before proceeding:

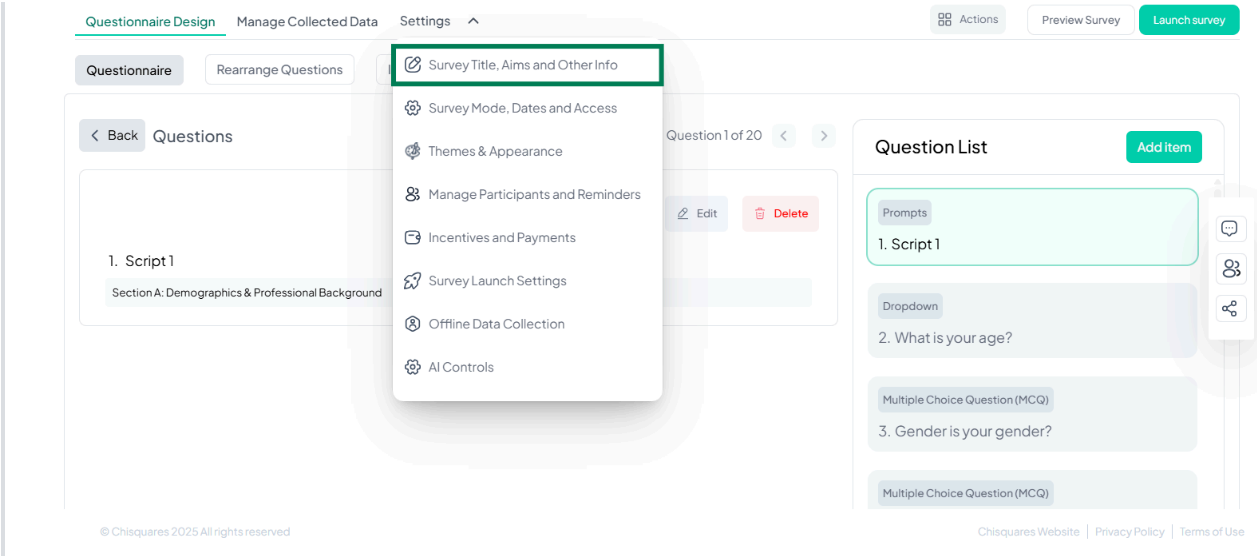
- You are logged into your account on the platform.
- You have access to the *Survey Design* interface.
- Your survey is at least in the *Prelaunched* state.

1. Go to the Settings Menu

- At the top of the screen, locate and click on the *Settings* tab found in the navigation bar next to “Manage Collected Data”.

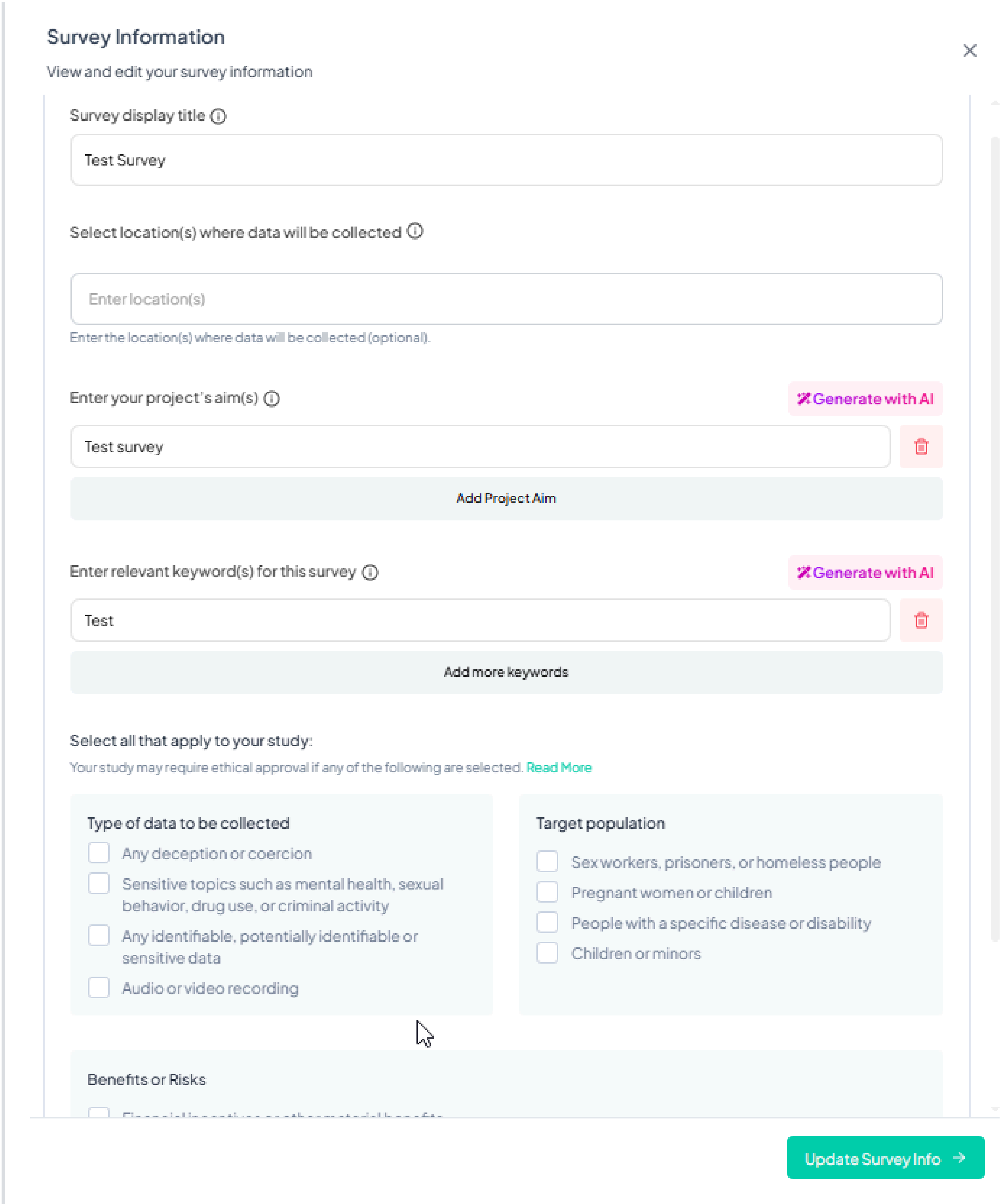
2. Open the Dropdown Menu

- Click **Settings** to reveal a dropdown menu.



3. Survey Title, Aims, and Other Info

- In the dropdown menu, locate and click on: *Survey Title, Aims, and Other Info.*
- This will direct you to the customization interface.



Fields and Descriptions

1. Survey Display Title *(Required)*

- **Purpose:** This is the main title of your survey, which will be displayed to participants and in reports.
- **How to Fill:** Enter a concise, descriptive title that reflects the survey's focus.
- **Example:** *"Evaluation of Research Software Usage Among MPH Students"*
- **Error Handling:** If this field is left blank, a validation error will appear requiring the user to enter a title.

2. Location(s) Where Your Data Will Be Collected *(Optional)*

- **Purpose:** Defines the geographic region where the survey is conducted.
- **How to Fill:** Enter the country or countries where the survey will be administered. This can be left blank if the survey is not tied to a specific location.
- **Example:** *"Nigeria, United States"*

3. Project Aims *(Required)*

- **Purpose:** Describe the objectives of the survey.
- **How to Fill:** Click Add Project Aim and enter a clear statement about what the survey aims to achieve.
- **Example:** *"To assess the adoption of research software tools among public health students."*

4. Keywords *(Optional)*

- **Purpose:** Helps categorize the survey for easier search and organization.

- **How to Fill:** Click Add More Keywords and input relevant terms.
- **Example:** *“Survey tools, data collection, public health research”*

Ethical Considerations & Sensitive Data

The Chisquares platform requires users to declare if their survey involves any sensitive data, protected populations, or potential risks.

1. Type of Data to Be Collected *(Checkbox Options)*

Users should check any applicable options:

- **Deception or Coercion** – If the survey involves misleading participants.
- **Sensitive Topics** – If the survey addresses mental health, drug use, or criminal activity.
- **Identifiable Data** – If the survey collects personal or sensitive information.
- **Audio/Video Recording** – If respondents’ voices or images will be recorded.

2. Target Population *(Checkbox Options)*

Indicate if your study involves vulnerable groups:

- **Sex workers, prisoners, or homeless people**
- **Pregnant women or children**
- **People with a specific disease or disability**
- **Children or minors**

3. Benefits or Risks *(Checkbox Options)*

Declare any associated benefits or risks:

- **Financial incentives**
- **Risk of harm (physical, psychological, financial, etc.)**
- **Risk of breaching confidentiality**

Updating Survey Information

1. Fill in all required fields.
2. Check applicable boxes for sensitive data and ethical considerations.
3. Click the Update Survey Info button to save changes.
4. If errors are displayed, correct the fields and try again.

Getting Started / Data Collection / Survey Design / Settings / Survey Mode, Dates, and Access

The Chisquares platform allows users to configure and customize survey settings based on study design, timeline, access control, and response management. This guide provides detailed instructions for setting up survey mode, timeline, and access permissions.

Prerequisites
Ensure the following before proceeding:

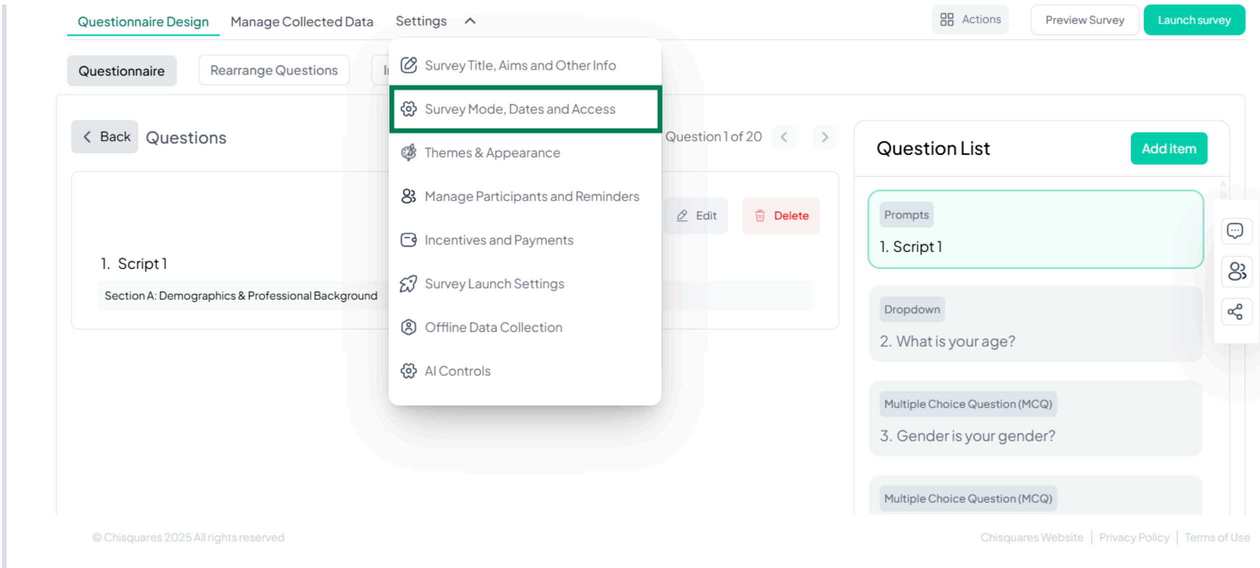
- You are logged into your account on the platform.
- You have access to the *Survey Design* interface.
- Your survey is at least in the *Prelaunched* state.

1. Go to the Settings Menu

- At the top of the screen, locate and click on the *Settings* tab found in the navigation bar next to “Manage Collected Data”.

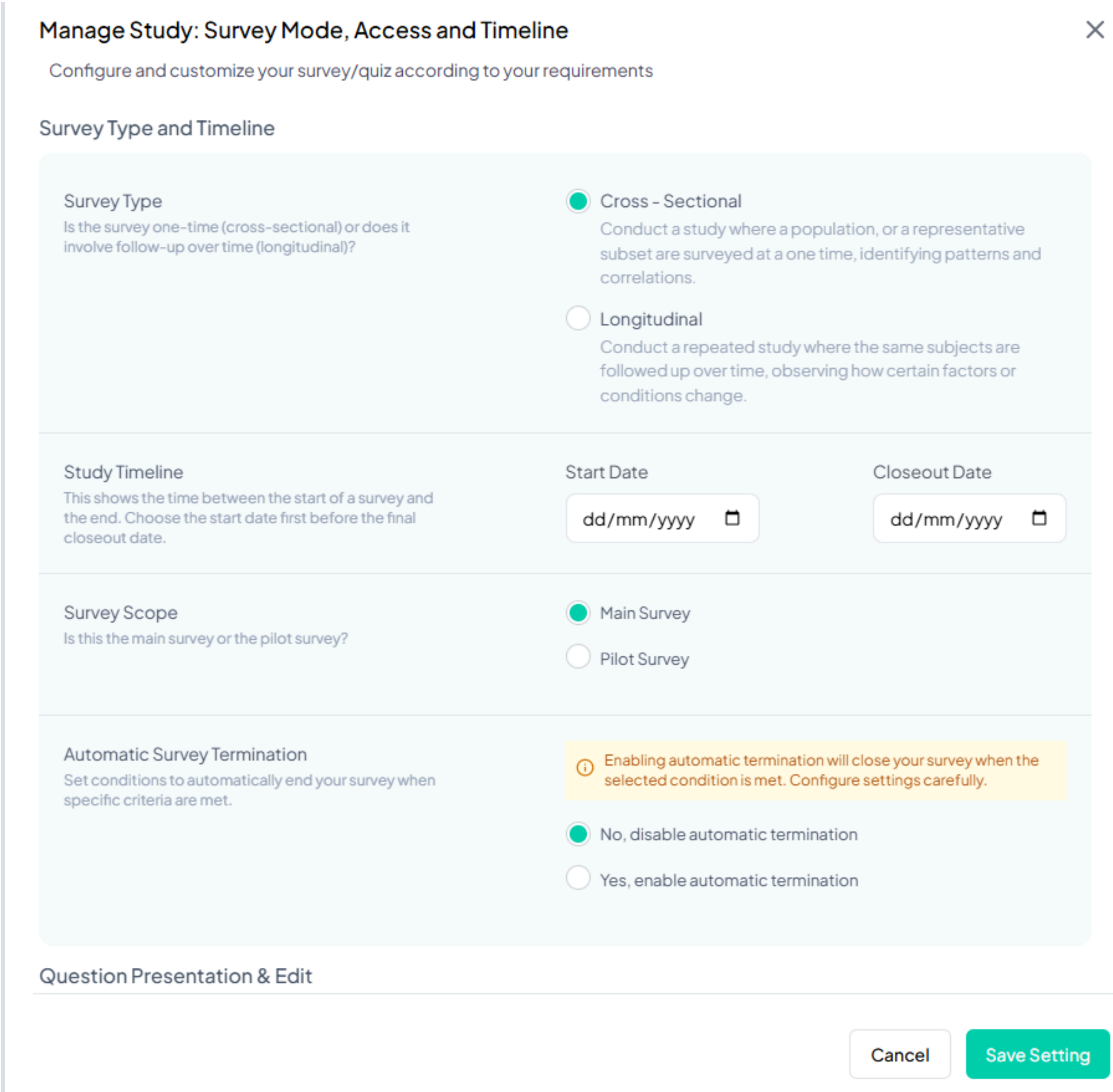
2. Open the Dropdown Menu

- Click **Settings** to reveal a dropdown menu.



3. Survey Mode, Dates, and Access

- In the dropdown menu, locate and click on: *Survey Mode, Dates, and Access.*
- This will direct you to the customization interface.



1. Survey Mode and Timeline

Survey Type

Choose between two types of surveys based on study design:

- **Cross-Sectional** (One-time survey): Conducts a study where participants are surveyed at a single point in time.
- **Longitudinal** (Repeated survey): Surveys the same participants over time to analyze changes.

Study Timeline

Set the start and closeout dates to define the survey period.

- **Start Date:** The date when the survey will be available to participants.
- **Closeout Date:** The date after which the survey will no longer accept responses.

Survey Scope

Define whether the survey is the main study or a preliminary test.

- **Main Survey:** The primary data collection survey.
- **Pilot Survey:** A small-scale preliminary survey to test the study design.

Automatic Survey Termination

Set conditions for automatic closure when specific criteria are met:

- **Enable:** The survey will automatically close when conditions are fulfilled.
- **Disable:** The survey remains open until manually closed or until the closeout date.

2. Question Presentation & Editing

Question Order / Rotation Settings

Determine how questions appear to respondents:

- **Keep all questions fixed** (default)
- **Shuffle all questions** (random order)
- **Fix some, shuffle others** (partial randomization)

Make All Questions Required

Specify whether responses to all questions are mandatory:

- **Yes:** All questions must be answered.
- **No:** Respondents can skip questions as per configuration.

Answer Option Format

Define how answer choices are displayed (e.g., numerical, text, etc.).

Lock Survey Instrument

Prevent modifications to questions and logic once finalized:

- Once locked, questions and routing logic cannot be changed without unlocking.

Show Timer

Decide if a system-generated timer will be displayed to respondents:

- **No Timer** (default)
- **Exact time spent** (tracks respondent time)

3. Survey Access and Response Settings

Survey Access Control

Decide whether survey links can be shared:

- **Yes:** Allows forwarding and open participation.
- **No:** Restricts access to email invitees only.

Response Management

Edit Previous Answers

- **Yes:** Respondents can edit previous responses before submission.
- **No:** Prevents answer editing.

Allow Save and Continue

- **Yes:** Enables participants to save progress and resume later.
- **No:** Disables save functionality.

Allow Response Editing After Submission

- **Yes:** Participants can revise their responses post-submission.
- **No:** Responses are final once submitted.

Multiple Entries

- **Yes:** Allows multiple submissions per participant.
- **No:** Restricts to a single submission per participant.

4. Survey Feedback & Security

Participant Feedback

- **Yes:** Allows respondents to provide feedback on survey experience.
- **No:** Disables feedback collection.

Post-Survey Responses View

- **Yes:** Participants can see their submitted responses.
- **No:** Prevents post-survey response viewing.

Quiz Setup & Timer Controls

- **Set as Quiz:** Converts the survey into a quiz format.
- **No Timer / Timed Quiz:** Enables/disables quiz timer.

Survey Security

Audit History

View a log of survey modifications and access history.

Password Protection

- **Yes:** Requires a password for survey access.
- **No:** Open to all participants.

Block IP Addresses

- **Yes:** Restricts access from specified IP addresses.
- **No:** No restrictions.

Saving Your Settings

Click **Save Settings** to apply your configurations.

Getting Started / Data Collection / Survey Design / Settings / Themes and Appearance

This guide provides a step-by-step walkthrough on how to navigate to the **Themes & Appearance** section from your survey interface. This section allows you to customize the look and feel of your survey, including layout, colors, and branding.

Prerequisites
Ensure the following before proceeding:

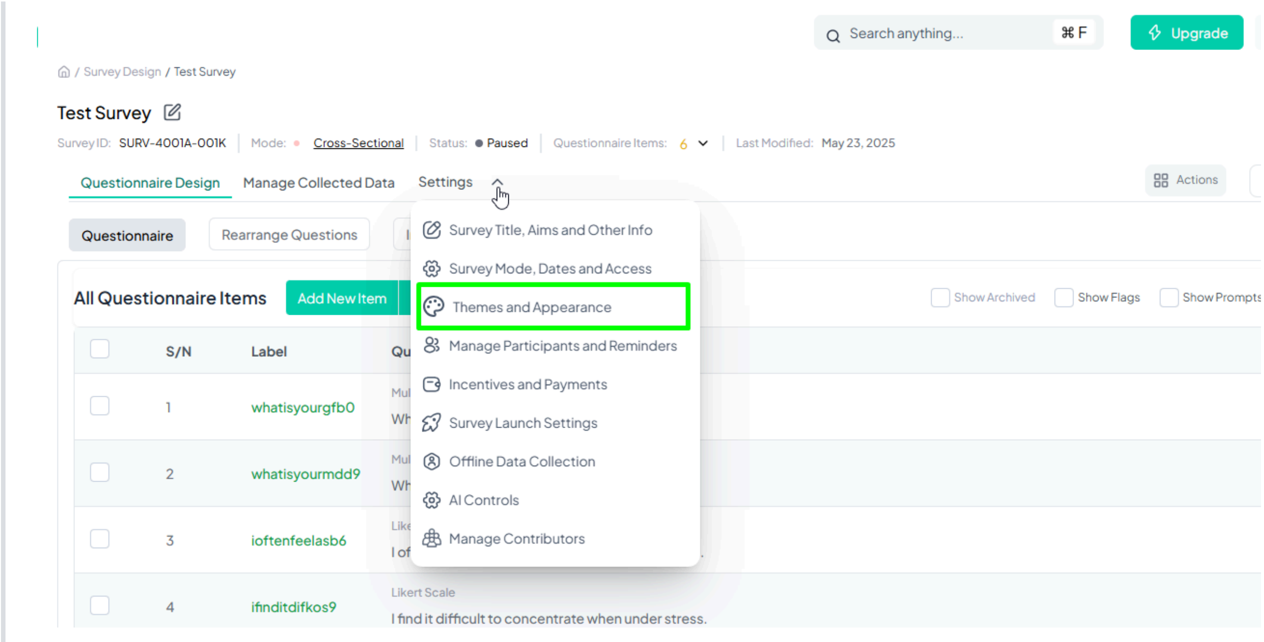
- You are logged into your account on the platform.
- You have access to the *Survey Design* interface.
- Your survey is at least in the *Prelaunched* state.

1. Go to the Settings Menu

- At the top of the screen, locate and click on the *Settings* tab found in the navigation bar next to “Manage Collected Data”.

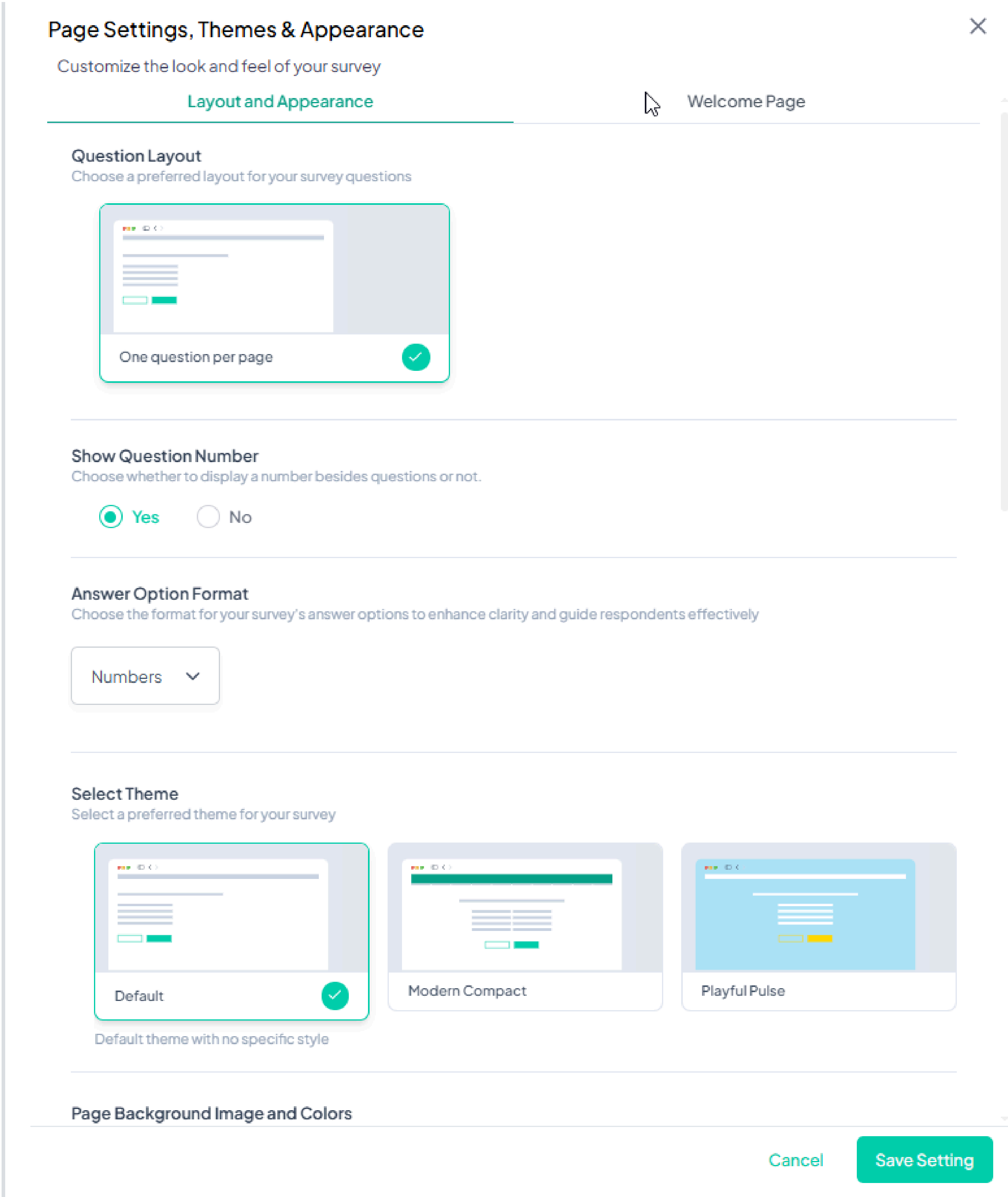
2. Open the Dropdown Menu

- Click **Settings** to reveal a dropdown menu.



3. *Select "Themes & Appearance"*

- In the dropdown menu, locate and click on: *Themes & Appearance*
- This will direct you to the customization interface.



1. Layout and Appearance

This section helps users define how survey questions appear and how the survey page is designed.

1.1 Question Layout

Users can choose how questions are displayed to participants:

- **One question per page:** Displays each question on a separate page.
- **All questions at once:** Displays all questions on a single page.

1.2 Show Question Number

Enables or disables question numbering:

- **Yes:** Displays a number beside each question.
- **No:** Hides question numbers.

1.3 Select Theme

Users can select from pre-designed themes to apply a consistent look to the survey. The default theme is selected by default.

1.4 Page Background Image and Colors

Users can modify the background appearance by:

- **Setting a background color** (default: #FFFFFF)
- **Uploading a background image** to customize the survey interface.

1.5 Page Fonts

Users can customize text appearance by selecting:

- **Font family:** Choose from available fonts (e.g., Roboto).
- **Font color:** Adjust text color.
- **Font size:** Modify the text size (default: 14px).

1.6 Page Button Display

Users can modify button styles and colors:

- **Button Style:** Choose between a **filled** or **border stroke** button design.
- **Primary and Secondary Button Colors:** Set custom colors for survey buttons (default: #03CDAA).

2. Welcome Page

This section allows users to create a professional introduction for their surveys.

2.1 Survey Page Header

Users can customize the survey title and branding:

- **Survey Display Title:** Enter a title that participants will see.
- **Brand/Company Name:** Optional field to display the organization's name.
- **Brand/Company Logo:** Upload and position a logo (Left or Right).

2.2 Welcome Page Settings

- **Enable or disable the welcome page** to display an introduction before the survey begins.
- **Survey Welcome Prompt:** Customize the message displayed to participants when they first access the survey.

2.3 Survey Tagline

Users can add a tagline above the title for additional context.

2.4 Collection Start and End Date

Users can enable or disable displaying survey start and end dates.

2.5 Welcome Page Illustration

Users can select an illustration or upload a custom image for the welcome page.

2.6 Start Button Label

Users can modify the label text for the button that initiates the survey (default: "Start Survey").

Saving Changes

After customizing the survey appearance, users must click **Save Settings** to apply their changes.

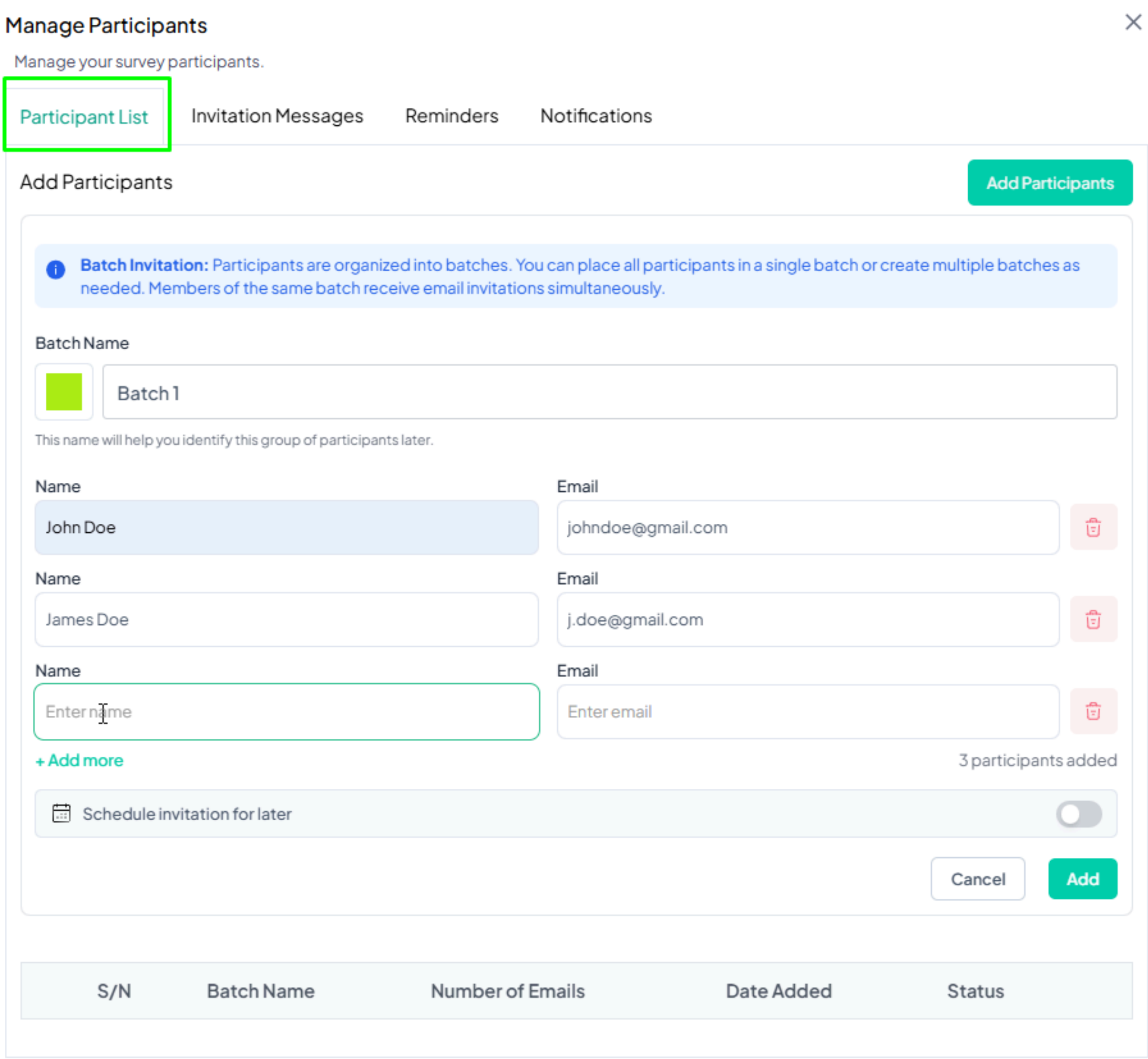
Getting Started / Data Collection / Survey Design / Settings / Manage Participants and Reminders

1.0 Overview

The "Manage Participants and Reminders" functionality on the Chisquares platform enables users to manage survey participants, send invitations, schedule reminders, and send notifications. It consists of four main submenus:

1.1 Adding Participants (Submenu: Participant List)

Users can add participants using three methods:



1.1.1 Manual Entry

- Click **Add Participant**.
- Enter the participant **Name** and **Email**.
- Click **+ Add More** to add additional participants.
- Optionally, customize participant email messages by clicking **"Customize participants email messages? Click here"**.

- Use the **Search Participants** bar to find specific entries.
- Click **Download** to export the participant list.
- Click **Add Participants** to confirm and save entries.

1.1.2 Copy and Paste

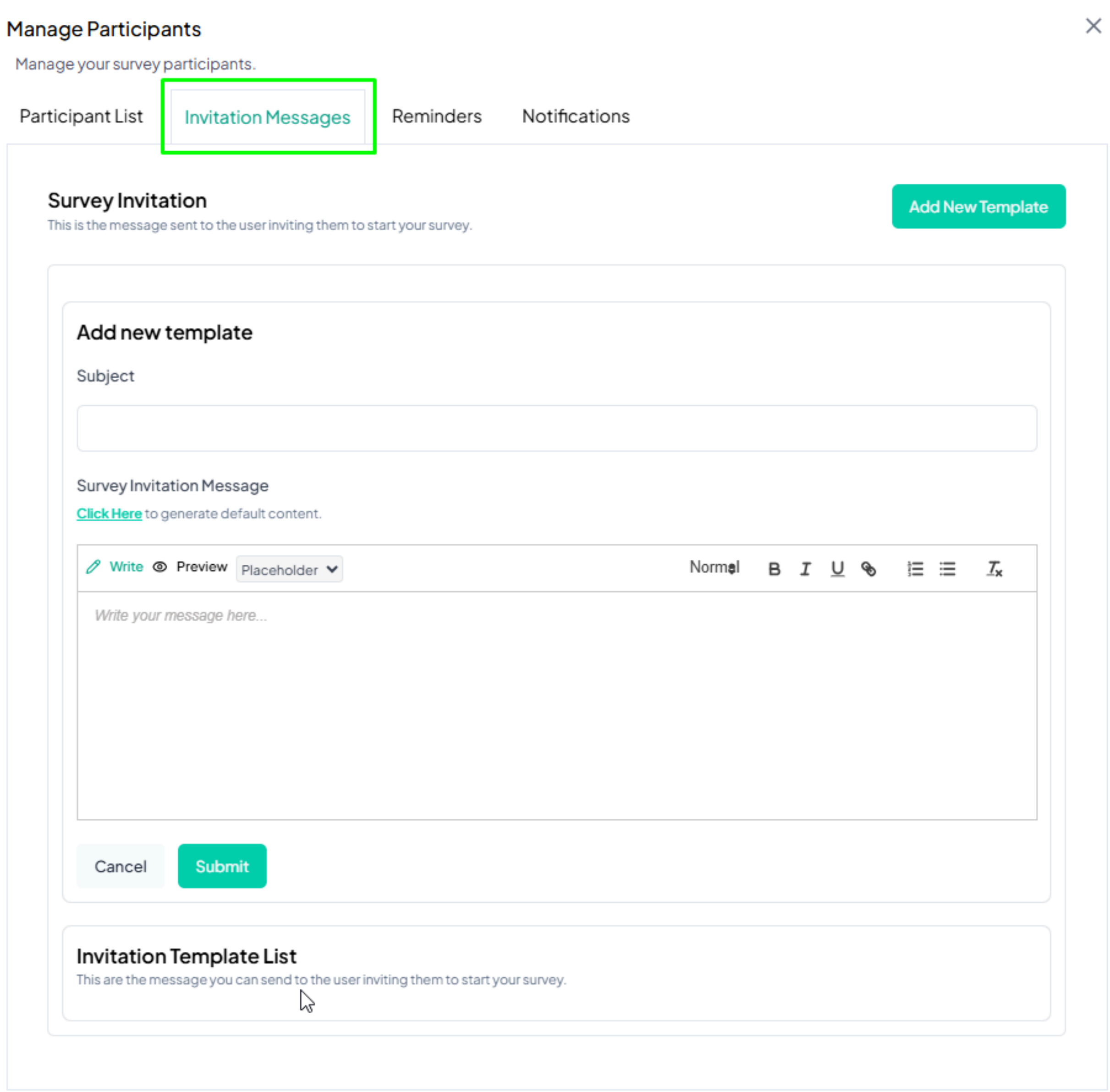
- Paste a list of participant emails separated by a comma (,).
- Click **Customize participant's email messages? Click here** to edit invitation content.
- Click **Add Participants** to confirm entries.

1.1.3 Upload File

- Ensure the file follows the correct format:
  - XLSX, CSV, or TXT format.
  - Email addresses in the first column labeled "EmailAddress".
  - Optional names in the second column labeled "Name".
- Drag and drop or click to upload the file.
- Customize participant email messages if needed.
- Click **Add Participants** to complete the upload.

1.2 Sending Invitation Messages (Submenu: Invitation Messages)

- The **Survey Invitation** message is sent to invite participants.

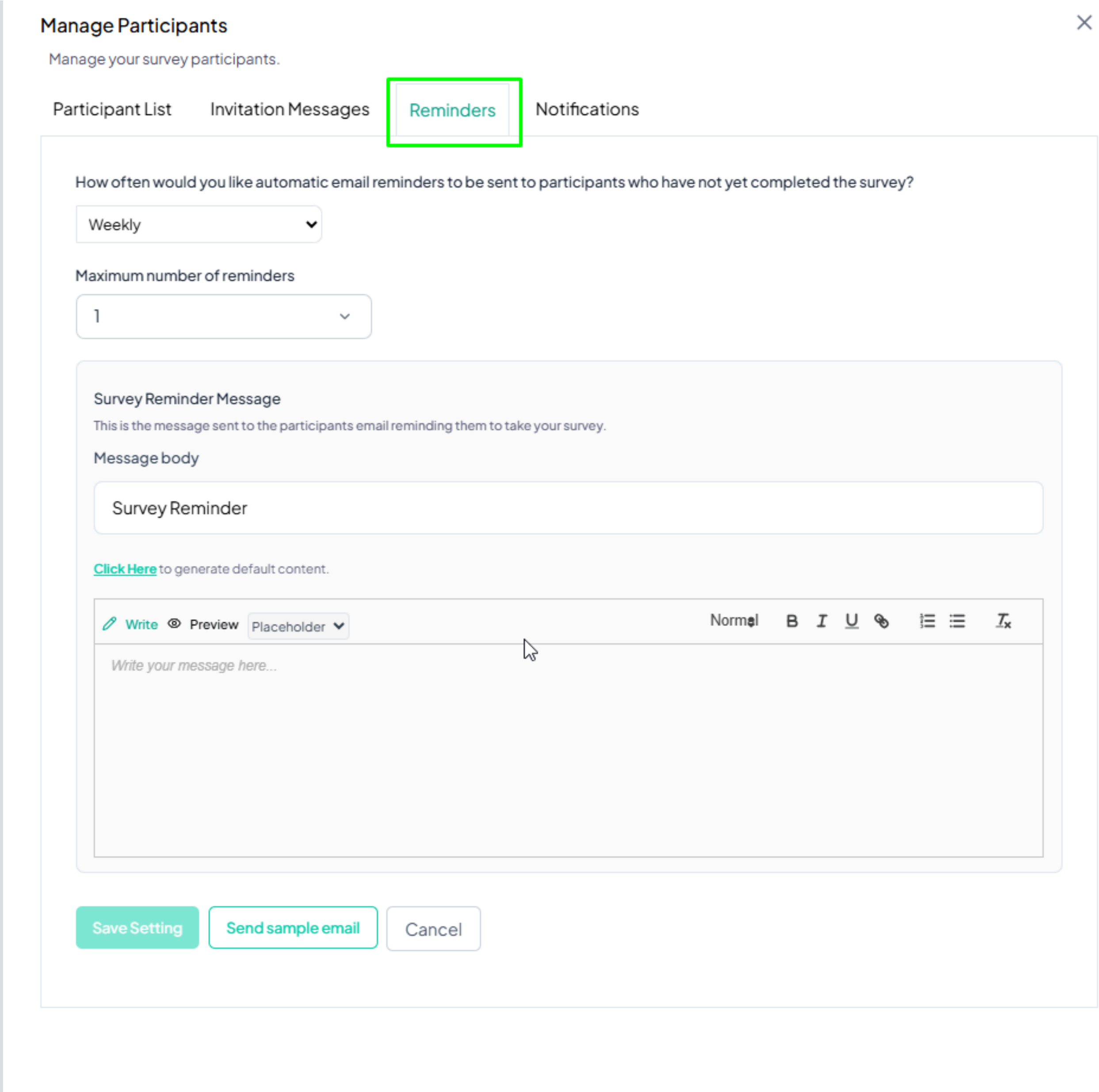


- Users can:
  - Edit the **Subject**.
  - Write or generate default message content.
  - Preview the message.
- **Email Delivery Options**:
  - Immediately after the survey is launched.
  - 2 days before data collection starts.

    - Immediately after data collection starts.
- **Send Sample Email**:
    - Enter an email to receive a test invitation.
    - Note: This email will be added to the participant list.

1.3 Scheduling Reminders (Submenu: Reminders)

- Users can schedule automatic reminders for incomplete surveys.

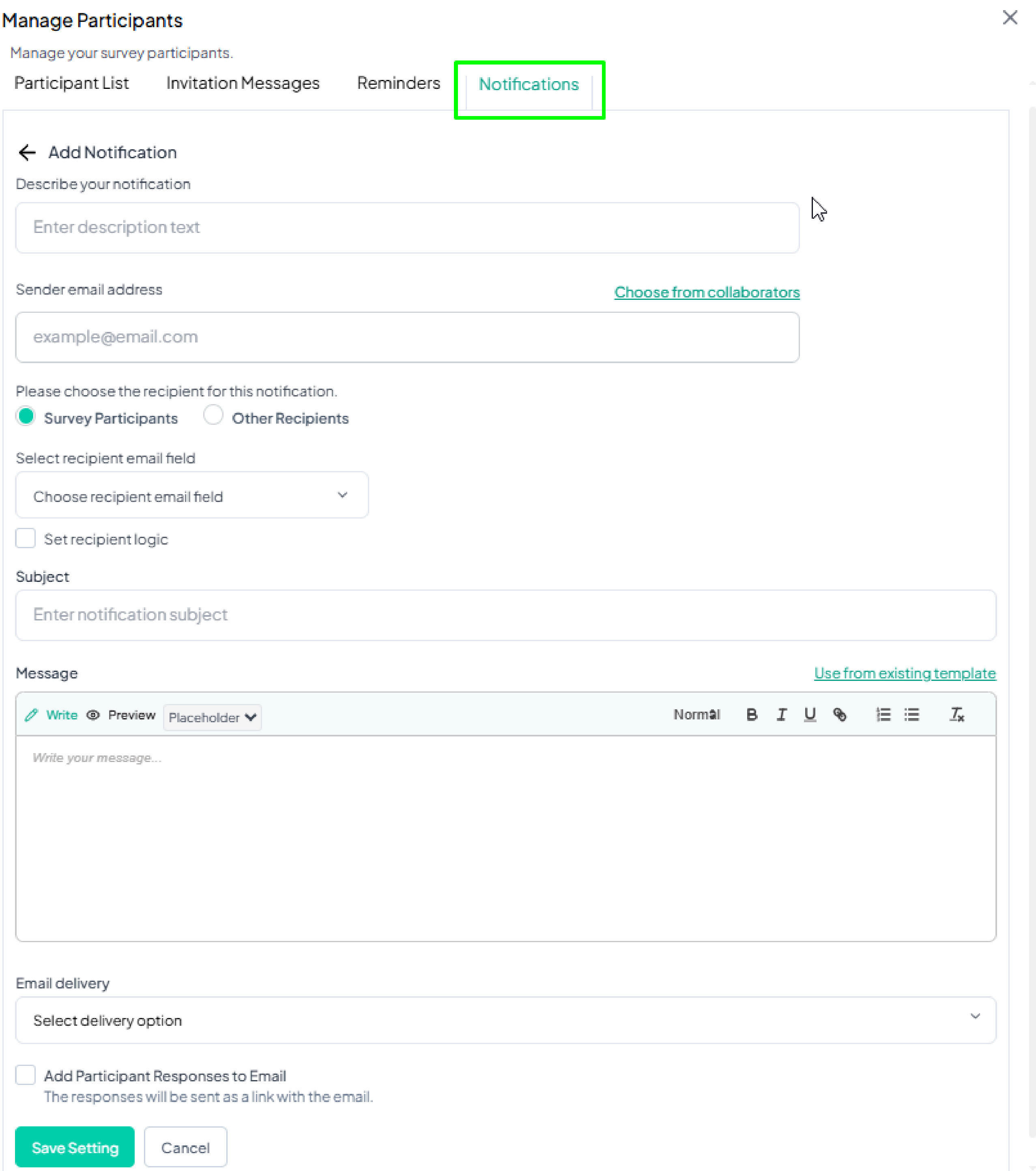


- Options:
  - Frequency: **Weekly (default, adjustable)**.
  - Maximum number of reminders: **1 (default, adjustable)**.
- Users can:
  - Edit the **Survey Reminder Message**.
  - Generate a default message.
  - Preview the content.

- **Send Sample Email** available for testing.

1.4 Sending Notifications to Participants (Submenu: Notification)

- Users can create and send notifications to survey participants or external contacts.



- Steps:
  - Click **Add Notification**.
  - Enter **Notification Description**.

- Choose **Sender's Email Address** from collaborators.
- Select **Recipients**:
  - Survey Participants
  - Other Recipients (Enter email addresses or select from contributors).
- Set **Trigger Event Logic** (optional).
- Enter **the Subject and Message**.
- Use an **existing template** if needed.
- Configure **Email Delivery Settings**.
- Click **Save Settings** or **Send Sample Email**.

1.5 Downloading Participant Data

- Click the **Download** button to export participant data.
- Data includes participant names, email addresses, and participation status.

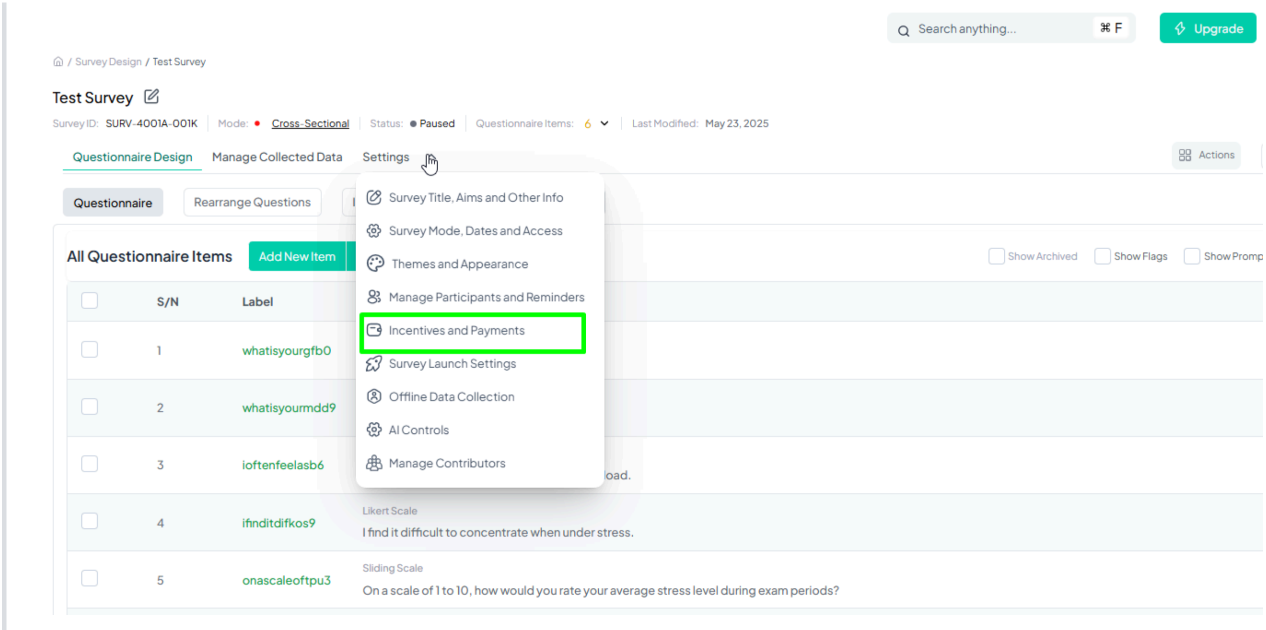
Getting Started / Data Collection / Survey Design / Settings / Incentives and Payments

1.0 Overview

The "Incentives and Payments" functionality on the Chisquares platform allows users to offer rewards to participants, encouraging engagement and completion of the survey.

1.1 Accessing the Incentives and Payments

1. Open the desired survey/project.
2. Navigate to the **Settings** dropdown menu.
3. Click on **Incentives and Payments**.

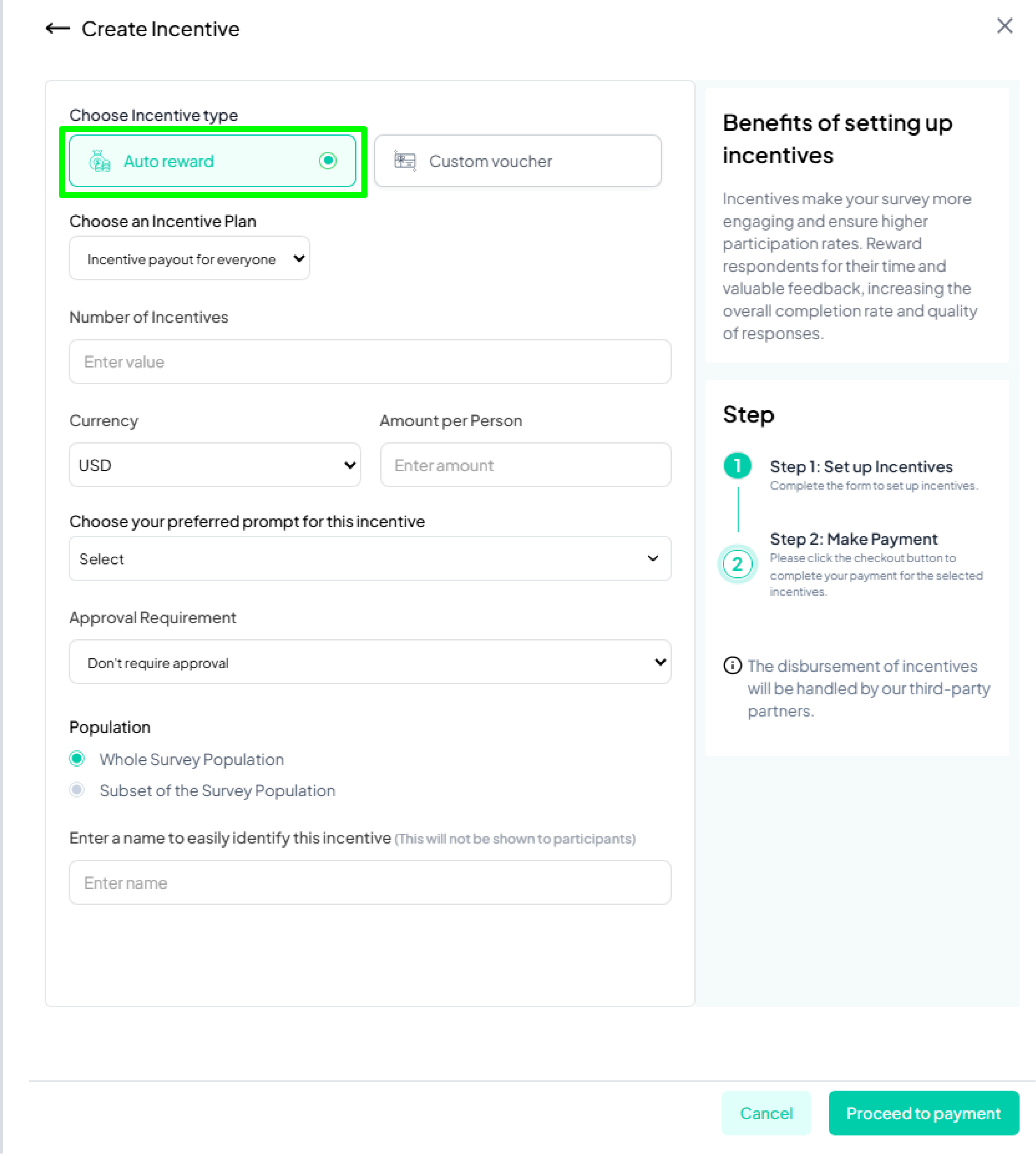


- Click **Create Incentive**.
- Choose an **Incentive Type**:
  - **Auto Reward** (automatically distributed based on survey completion).
  - **Custom Voucher** (manual distribution of promo codes or gift cards).

1.2 Setting Up Auto Reward Incentive

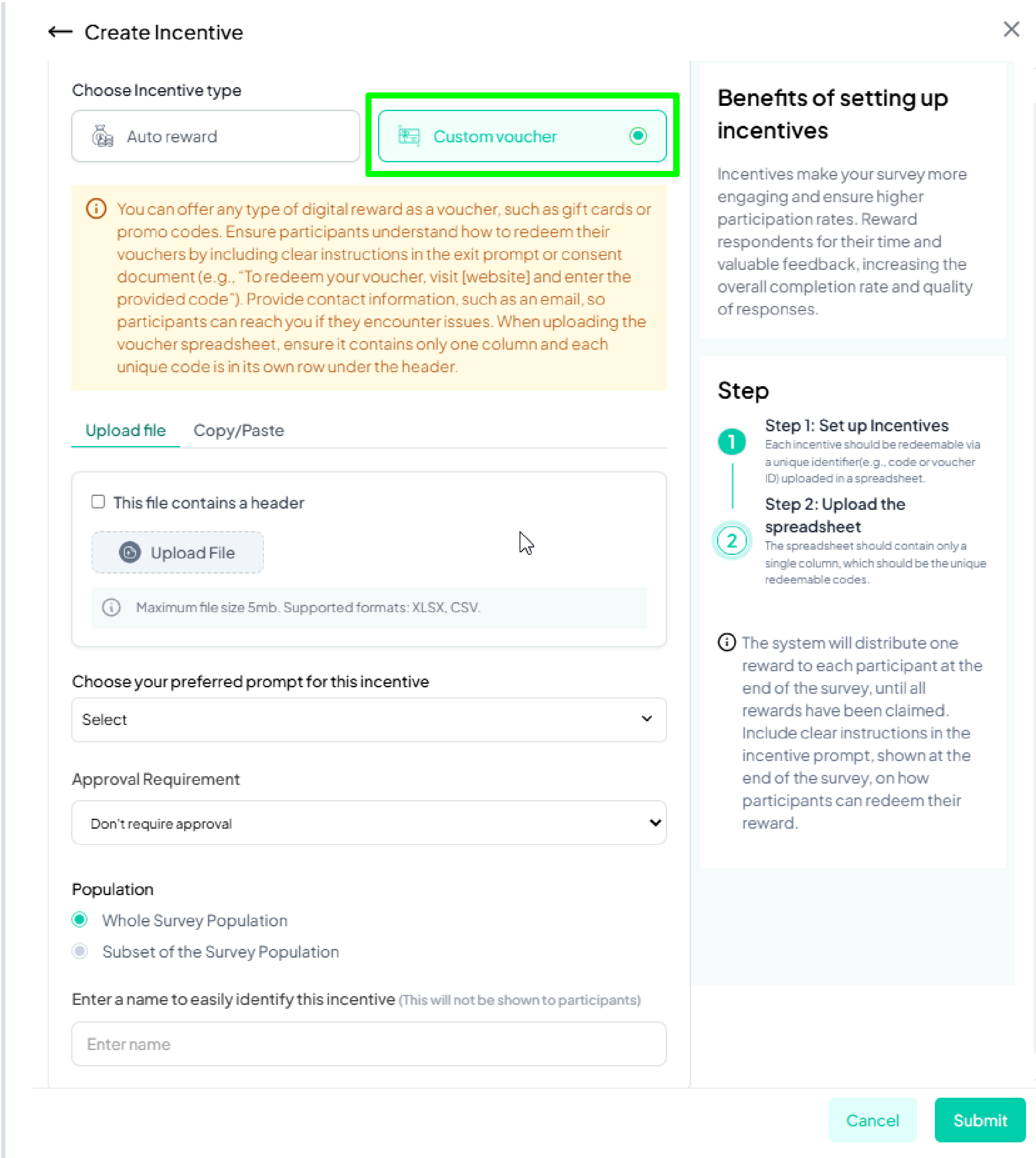
- Select **Auto Reward** as **Incentive Type**
- Select an **Incentive Plan**:
  - **Incentive Payout for Everyone** (fixed reward for all participants).
- Define the **Number of Incentives**.
- Choose the **Currency** (e.g., USD).
- Enter the **Amount per Person**.
- Define the **Target Population**:
  - Whole survey population.
  - Subset of survey participants.

- Name the incentive for easy identification.
- Click **Proceed to Payment**.



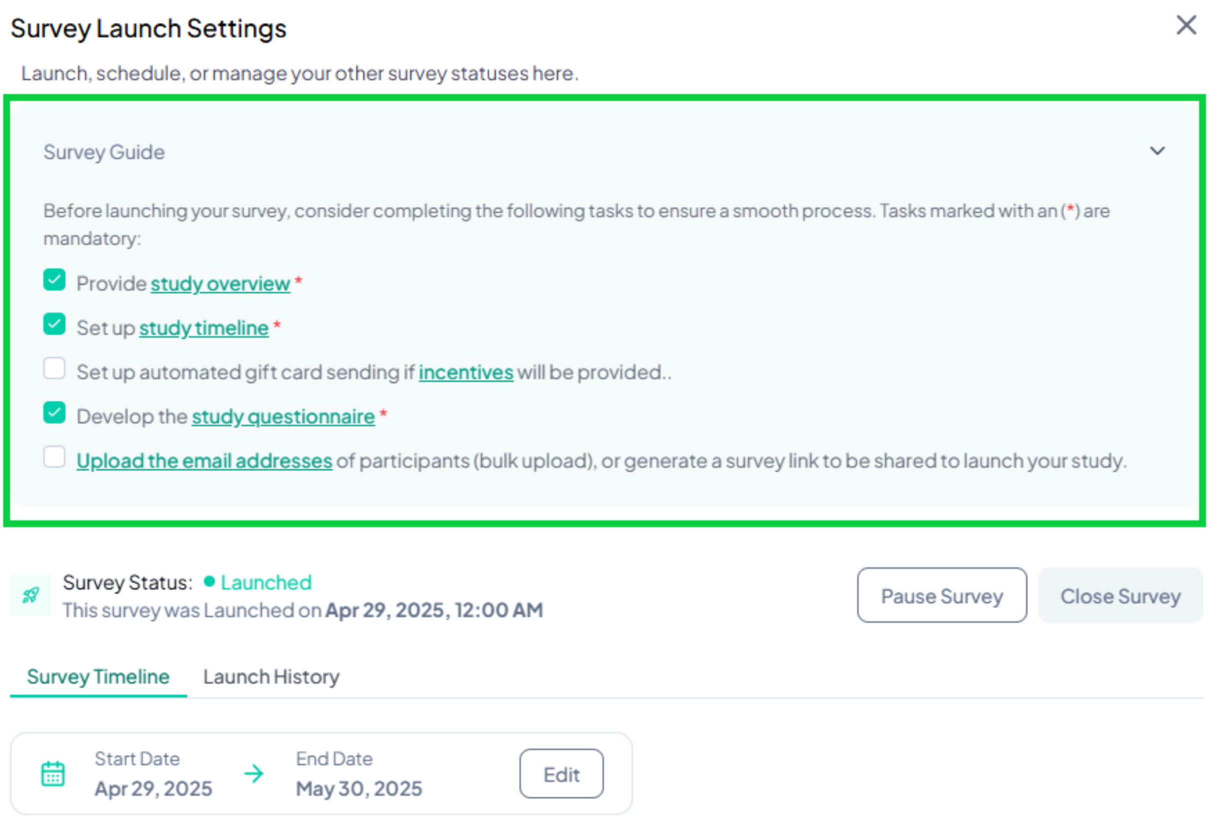
1.3 Setting Up Custom Voucher

- Select **Custom Voucher** as **Incentive Type**
- Choose how to upload voucher codes:
  - **Upload File** (XLSX, CSV format; max 5MB).
  - **Copy/Paste** (enter voucher codes separated by commas, new lines, or semicolons).
- Set redemption instructions and contact details.
- Click **Proceed to Payment**.


Create Incentive
Choose Incentive type
Auto reward
Custom voucher
You can offer any type of digital reward as a voucher, such as gift cards or promo codes. Ensure participants understand how to redeem their vouchers by including clear instructions in the exit prompt or consent document (e.g., "To redeem your voucher, visit [website] and enter the provided code"). Provide contact information, such as an email, so participants can reach you if they encounter issues. When uploading the voucher spreadsheet, ensure it contains only one column and each unique code is in its own row under the header.
Upload file
Copy/Paste
This file contains a header
Upload File
Maximum file size 5mb. Supported formats: XLSX, CSV.
Choose your preferred prompt for this incentive
Select
Approval Requirement
Don't require approval
Population
Whole Survey Population
Subset of the Survey Population
Enter a name to easily identify this incentive (This will not be shown to participants)
Enter name
Benefits of setting up incentives
Incentives make your survey more engaging and ensure higher participation rates. Reward respondents for their time and valuable feedback, increasing the overall completion rate and quality of responses.
Step
Step 1: Set up Incentives
Each incentive should be redeemable via a unique identifier(e.g., code or voucher ID) uploaded in a spreadsheet.
Step 2: Upload the spreadsheet
The spreadsheet should contain only a single column, which should be the unique redeemable codes.
The system will distribute one reward to each participant at the end of the survey, until all rewards have been claimed. Include clear instructions in the incentive prompt, shown at the end of the survey, on how participants can redeem their reward.
Cancel
Submit

Getting Started / Data Collection / Survey Design / Settings / Survey Launch Settings

The "Survey Launch Settings" on the Chisquares platform allow users to launch, schedule, and manage survey statuses.



1.1 Survey Guide

Before launching, users should complete:

- **Study Overview** *(mandatory)*.
- **Study Timeline** *(mandatory)*.
- **Automated Gift Card Setup** (if applicable).
- **Study Questionnaire** *(mandatory)*.
- **Participant Email Upload or Survey Link Generation**.

1.2 Survey Status

- Displays the real-time status:
  - **Prelaunched**
  - **Launched**
  - **Paused**
  - **Closed**

1.3 Scheduling Survey Launch

- Click **Schedule Launch**.
- Set **Start Date** and **End Date**.
- Select the **Timezone**.
- Click **Save Schedule**.

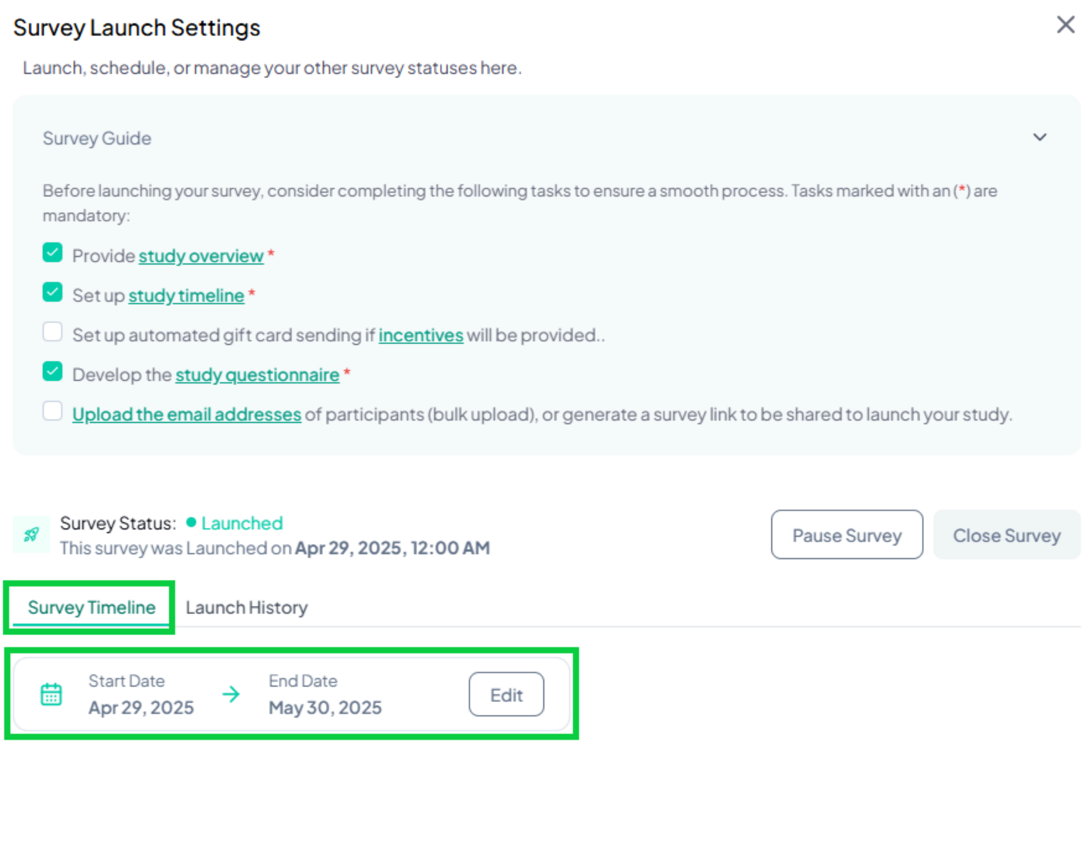
1.4 Launching the Survey

- Click **Launch Now** to start the survey immediately.

- A confirmation message appears upon successful launch.

1.5 Survey Timeline Management

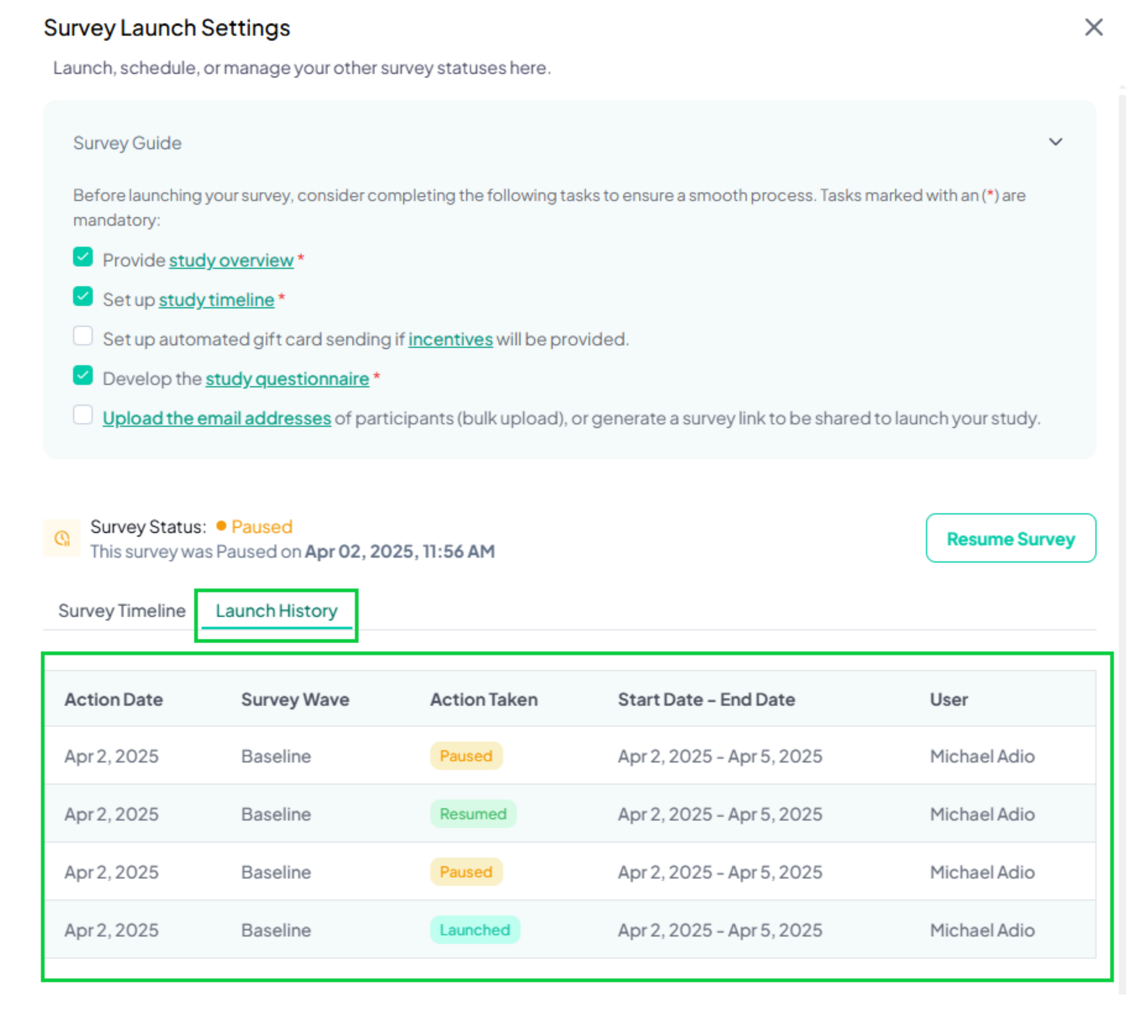
- Displays:
  - **Start Date** (editable via **Edit** button).
  - **End Date** (editable via **Edit** button).



1.6 Launch History

- Logs all actions related to survey launching, pausing, and resumption.
- Data includes:
  - **Action Date**

- **Survey Wave**
- **Action Taken** (Launched, Paused, Resumed)
- **Start and End Date**
- **User who performed the action**



Getting Started / Data Collection / Survey Design / Settings / Offline Data Collection

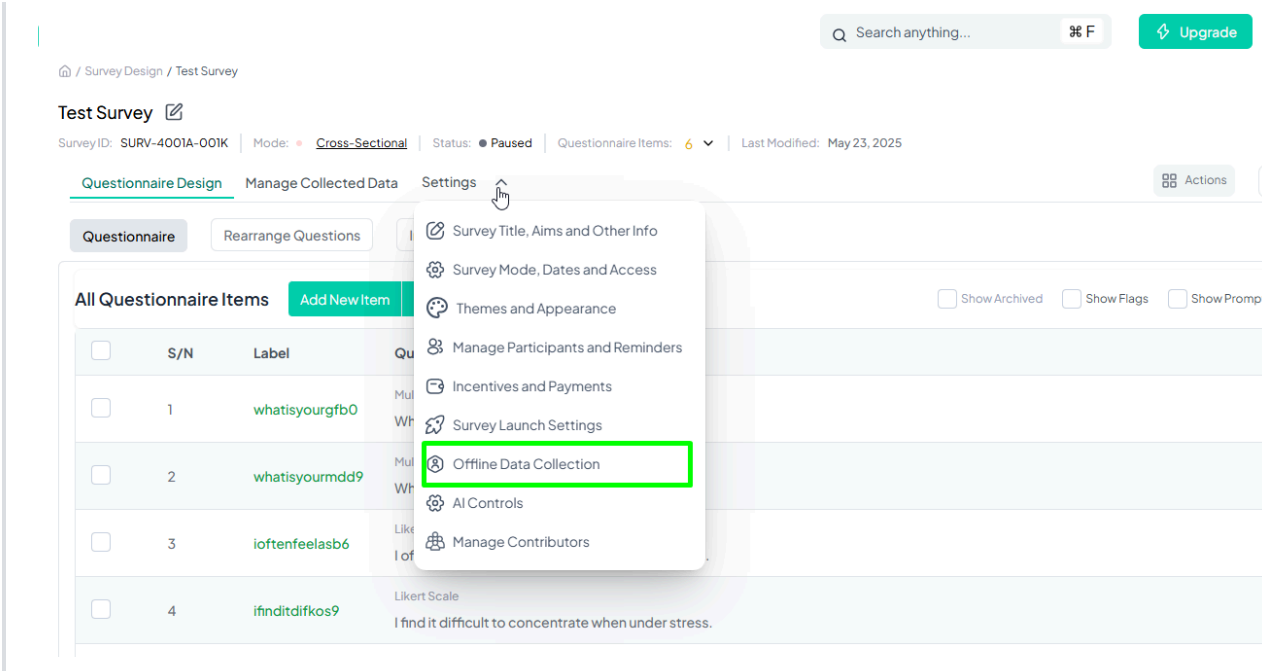
Offline Data Collection

Offline data collection on the Chisquares platform enables users to gather data in areas with limited or no internet access. The platform ensures seamless data capture by storing information locally on devices, preventing disruptions due to connectivity issues. Once an internet connection becomes available, the stored data automatically synchronizes with central databases, ensuring efficient and secure data management.

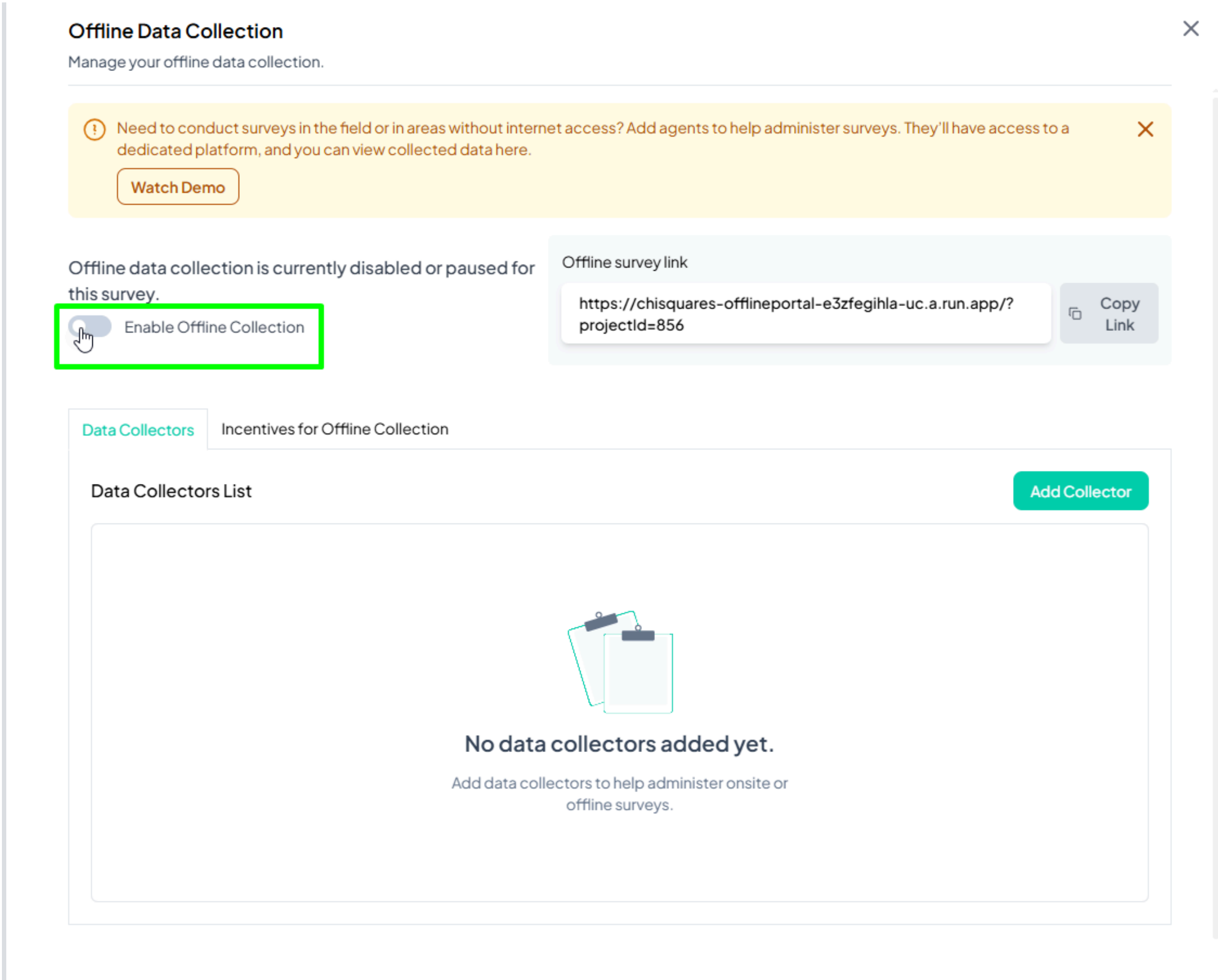
Enabling Offline Data Collection

To activate the offline data collection feature, follow these steps:

1. Navigate to your survey and click on Settings.
2. From the settings drop-down list, select Offline Data Collection.



3. This will open the Offline Data Collection dialog box.
4. Toggle Enable Offline Collection to activate the feature.



Managing Data Collectors

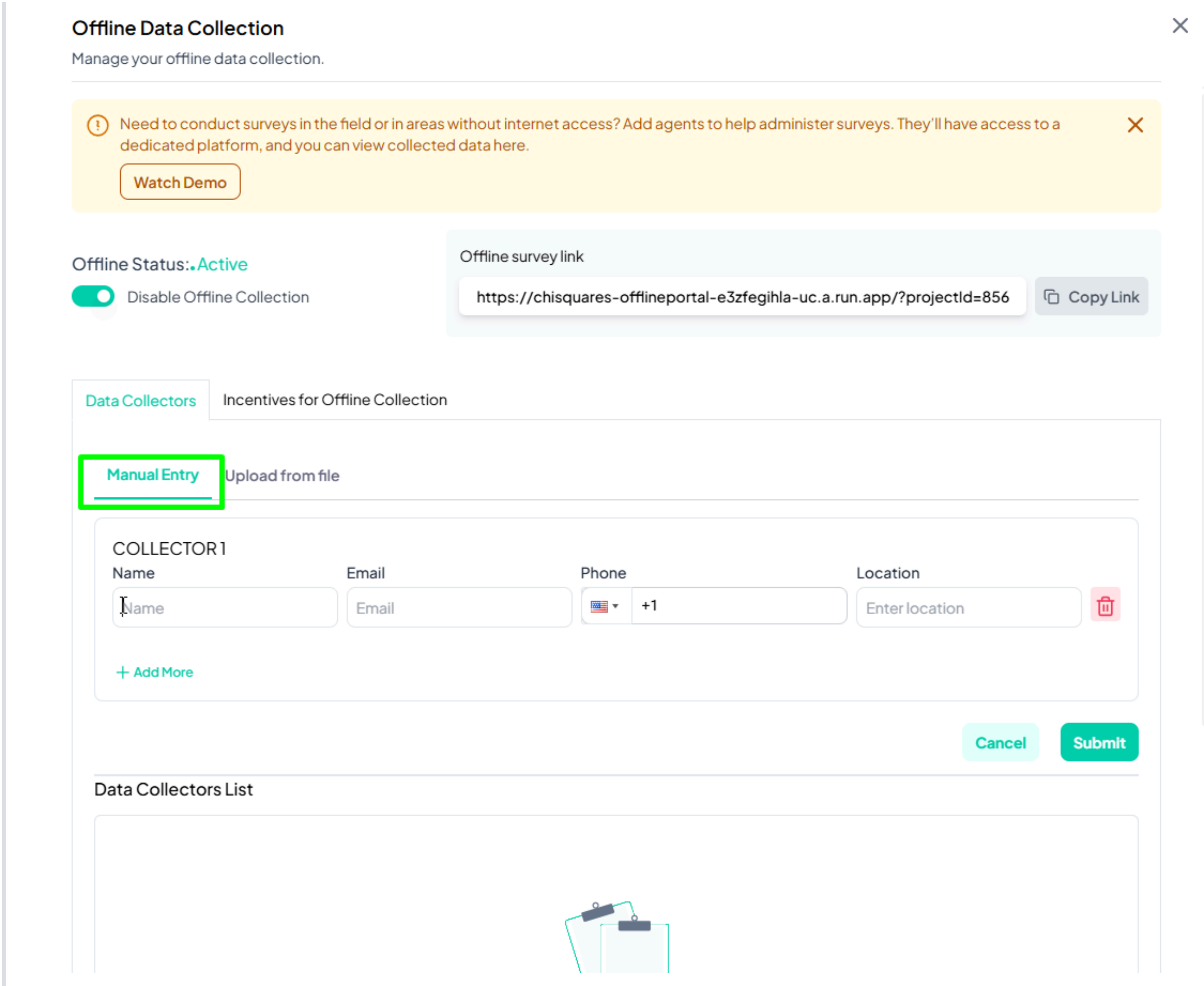
The Offline Data Collection section consists of two main tabs:

1. Data Collectors
2. Offline Incentives

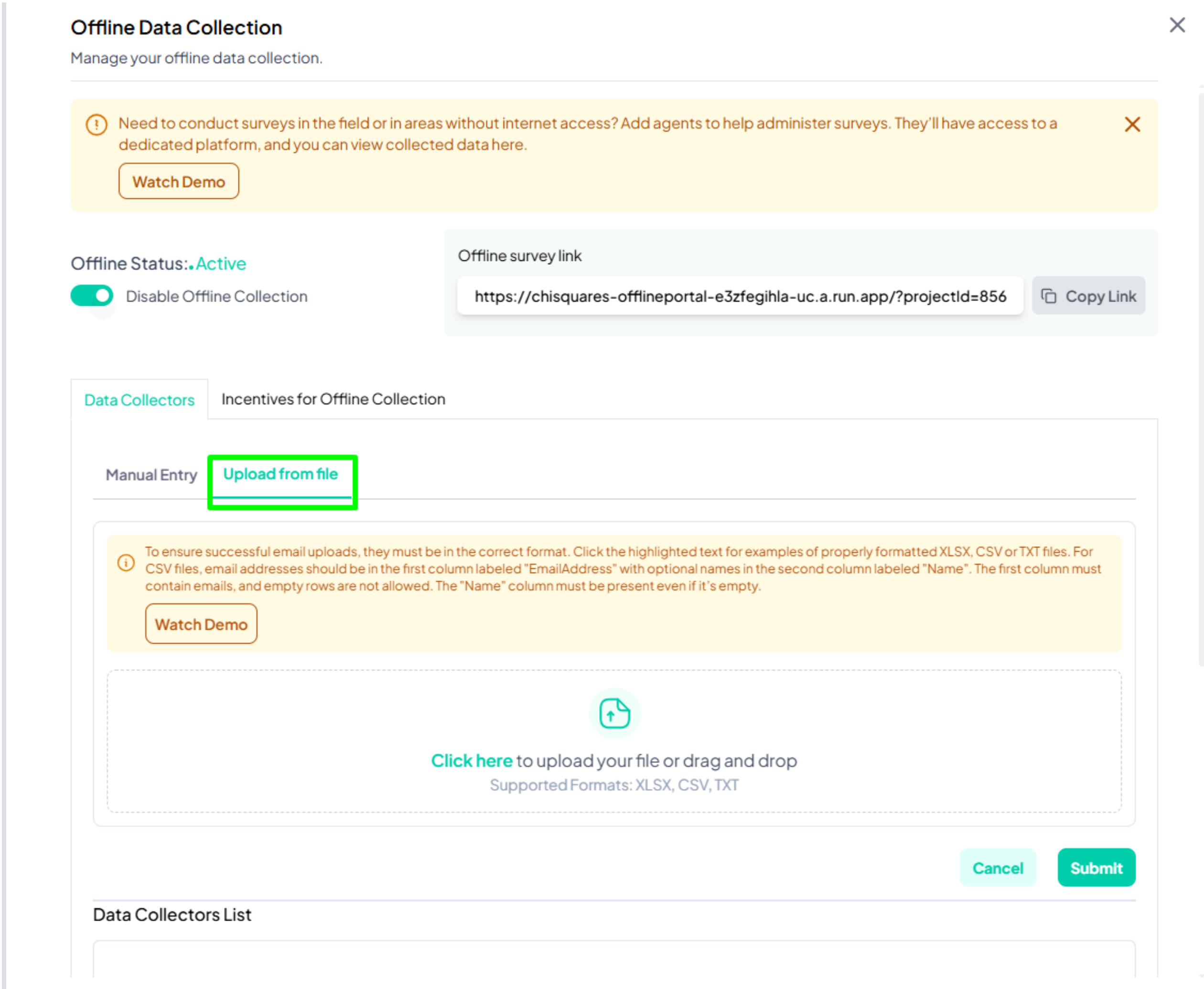
Data Collectors Tab

Users have two options for adding data collectors:

- **Manual Entry:** The investigator must input the names, emails, phone numbers, and locations of collectors individually.



- **Upload from File:** The investigator can upload an XLSX, CSV, or TXT file containing the list of data collectors, streamlining the process of assigning field workers.



By following these steps, users can efficiently set up and manage offline data collection, ensuring accurate and reliable data gathering in various field conditions.

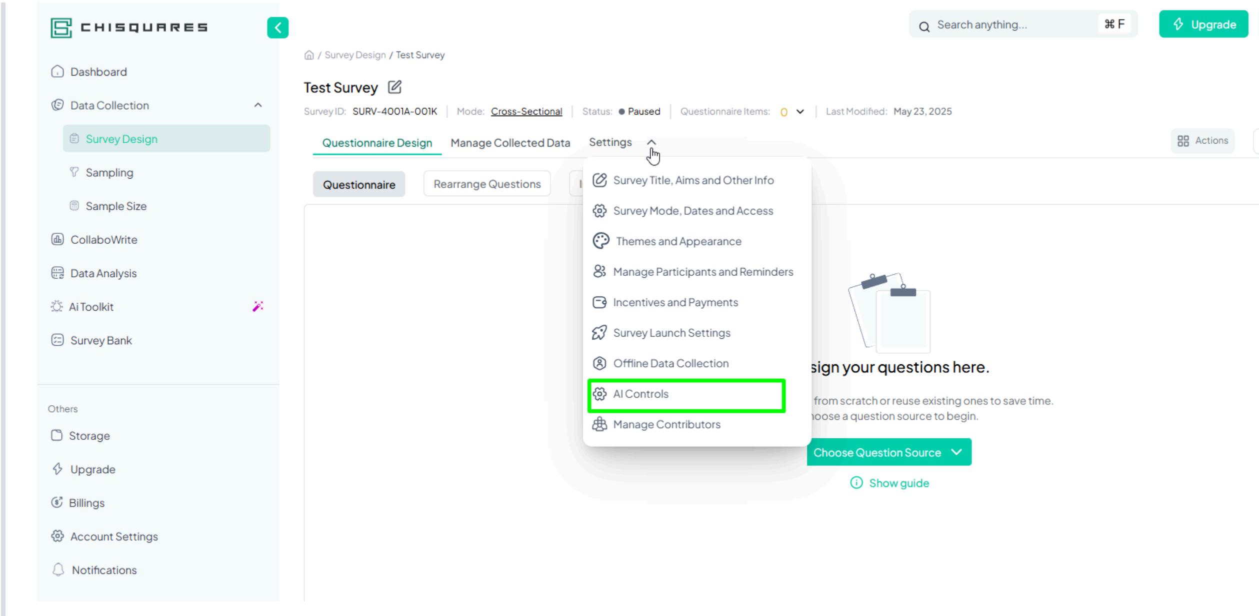
Getting Started / Data Collection / Survey Design / Settings / AI Control

Chisquares integrates AI-powered assistance to enhance survey design and methodology reporting. Users have the flexibility to enable or disable specific AI features based on their research needs.

Accessing the AI controls

To configure AI controls settings

1. Open the desired survey/project.
2. Navigate to the **Settings** dropdown menu.
3. Click on **AI controls**.
4. The AI Controls panel will appear, allowing users to toggle various AI assistance features on or off by selecting the appropriate radio button: “Yes” to enable (On) or “No” to disable (Off).



AI Assistance features

1. The Aims Suggester:

The Aims Suggester generates study aims based on the provided research context, helping researchers refine their objectives more efficiently.

2. The Keywords Suggester:

The Keywords Suggester suggests relevant keywords, improving the discoverability and relevance of research topics.

3. The Label Suggester:

To facilitate data organization, the Label Suggester provides variable names for survey questions based on their stems. This ensures a structured approach to data collection and analysis.

4. The Introduction of Methodology Report:

The Introduction of Methodology Report feature generates an introductory section based on the study aims. Even without AI, a methodology report can be created based on the aims you provide. However, AI ensures the introduction is coherent, tailored, and aligned with best scientific writing practices.

5. Thematic analysis of qualitative data:

Codes open-ended responses and identifies emerging themes. Without AI, analysis of unstructured data will be limited to word cloud analysis. This enables deeper insights that go beyond surface-level patterns.

6. Extraction of responses from paper questionnaires:

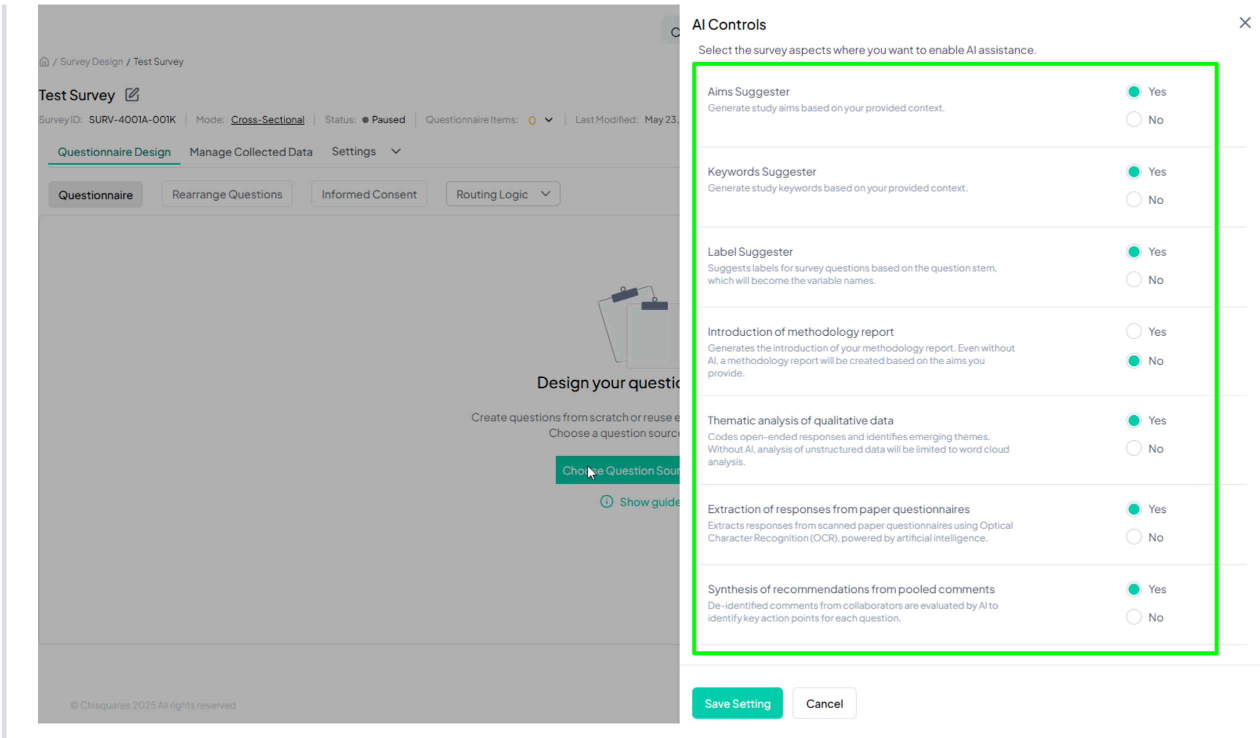
Extracts responses from scanned paper questionnaires using Optical Character Recognition (OCR), powered by artificial intelligence. This ensures efficient digitization and prevents data loss from manual entry.

7. Synthesis of recommendations from pooled comments:

De-identified comments from collaborators are evaluated by AI to identify key action points for each question. This transforms scattered feedback into clear, actionable strategies.

Enabling or Disabling AI Features

Users can customize their AI experience by selecting Yes or No for each feature. Once preferences are set, clicking Save Setting applies the changes.



With these AI controls, Chisquares optimizes survey design while allowing researchers to maintain full control over their study components.

Getting Started / Data Collection / Survey Design / Settings / Manage Contributors

The **Manage Contributors** feature on the Chisquares platform enables project owners and authorized collaborators to regulate team access, assign roles, and monitor contributions across a research project. This powerful tool ensures streamlined teamwork by offering a clear overview of who is involved, their responsibilities, and their activity status. This manual provides detailed guidance on using the feature effectively.

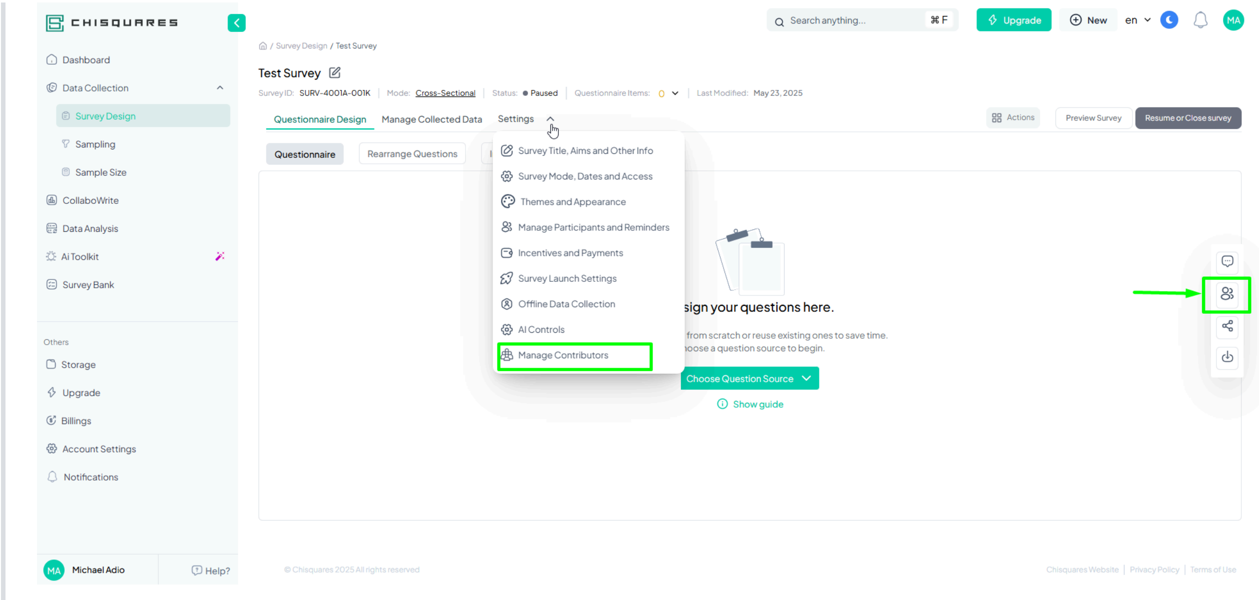
Accessing the Manage Contributors Panel

Method 1: Through the Settings Dropdown

1. Open the desired survey/project.
2. Navigate to the **Settings** dropdown menu.
3. Click on **Manage Contributors**.

Method 2: Through the User Icon

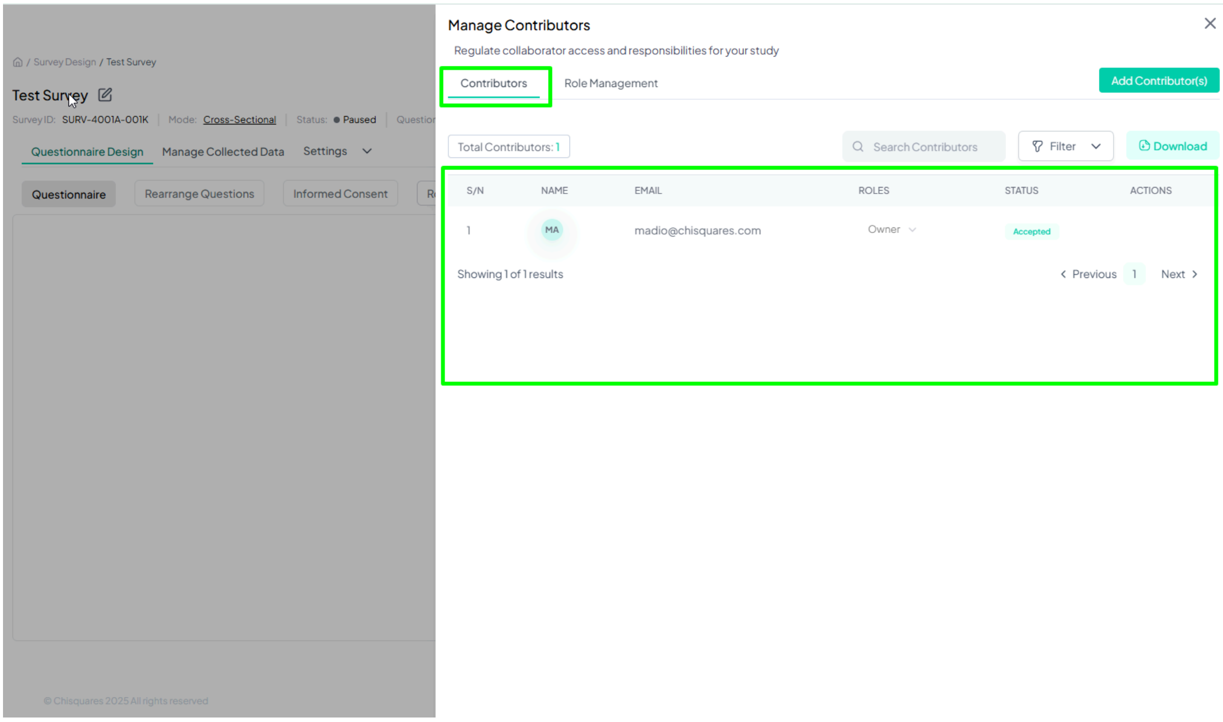
1. Locate the **User/People Icon** on the right-hand border of the screen.
2. Click the icon to open the **Contributor Tab Panel**.



Contributor Tab Panel Overview

Upon accessing the panel, you will see a tabular display showing all current contributors. The table includes:

- S/N
- Name
- Email
- Roles
- Status
- Actions



Summary Information

- The **Total Contributors** count is displayed at a glance.
  - Example: `Total Contributors: 1`

Available Actions

1. Search Contributors

Use the search bar to locate contributors by name or email.

2. Filter Contributors

You can filter contributors by:

Status:

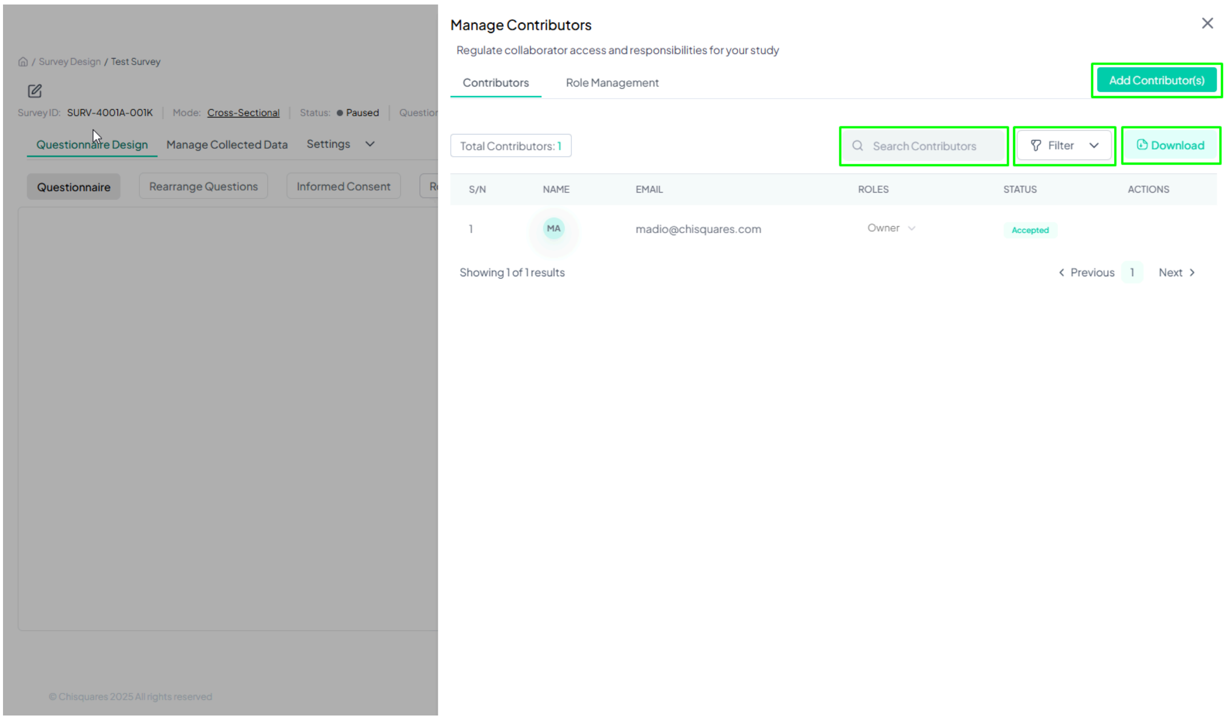
- Pending
- Accepted
- Rejected

Role:

- Project Owner
- Co-Lead
- Co-Author
- Senior Author
- Research Mentor
- Project Supervisor
- Admin Assistant
- Proof-Reader
- Peer Reviewer

3. Download Contributor List

Click the **Download** button to export a `.CSV` file of contributors. This file contains detailed information for administrative and documentation purposes.



4. Add Collaborator(s)

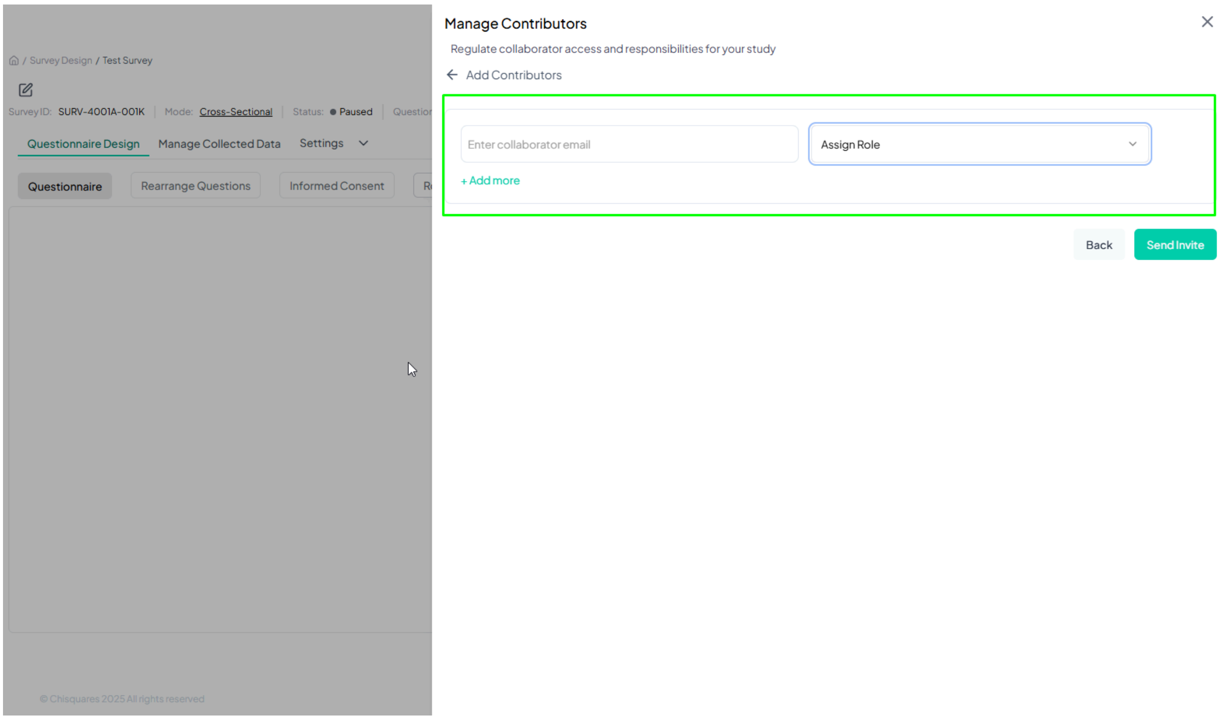
The **Add Collaborator(s)** button is available in the Contributor Tab Panel. This feature allows you to invite new contributors to your project by entering their email address and assigning them an appropriate role (System defined or User defined).

Steps to Add a Collaborator:

1. Click the **Add Collaborator(s)** button.
2. Enter the collaborator’s email address.
3. Select a role from the dropdown menu.
4. Click the **Send Invite** button.

The invitation will be delivered to the invited collaborator via email and as a notification on their Chisquares account.

The invited collaborator has the option to either **Accept** or **Reject** the invitation.



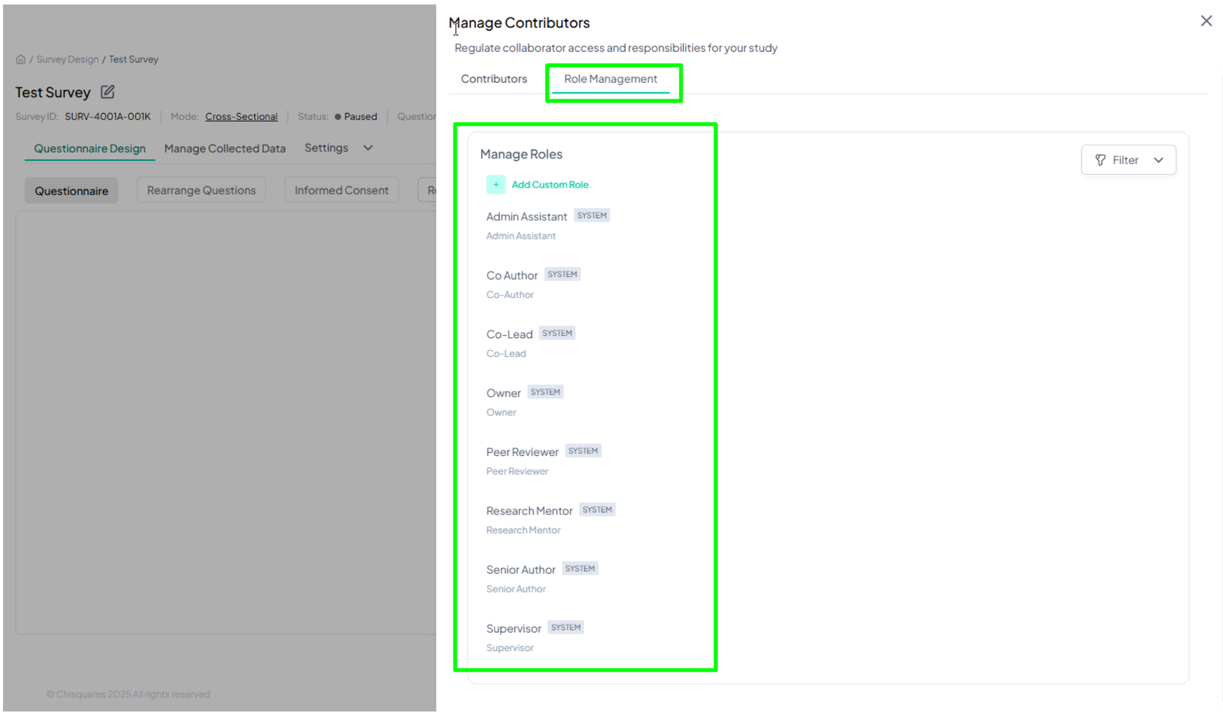
Role Management Panel

System-defined Roles

The platform provides predefined roles with built-in permissions. Each role includes a description and view permissions functionality:

- Admin Assistant (SYSTEM)
- Co-Author (SYSTEM)
- Co-Lead (SYSTEM)
- Owner (SYSTEM)
- Peer Reviewer (SYSTEM)
- Research Mentor (SYSTEM)

- Senior Author (SYSTEM)
- Supervisor (SYSTEM)

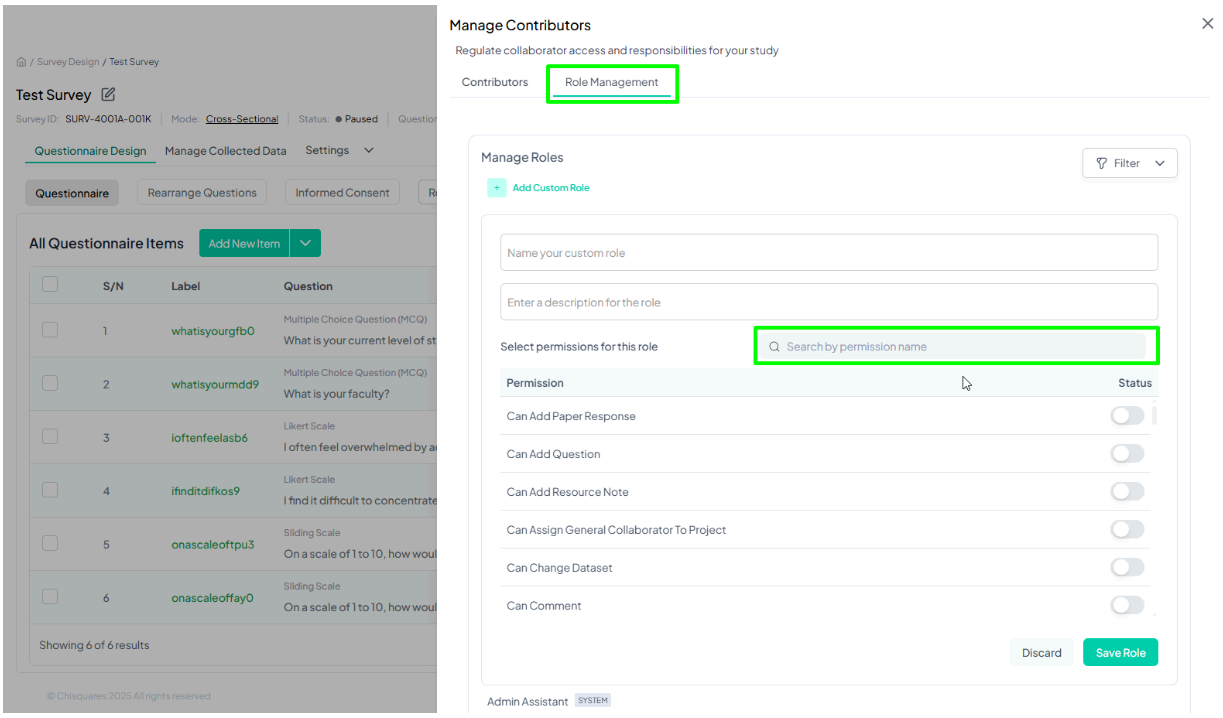


Custom Roles

The platform allows users to define custom roles and assign user-defined permissions tailored to the specific needs of a project. This ensures flexible and controlled access management for different team members.

Permission Assignment Made Easy

While assigning permissions to a custom role, a search bar is provided to streamline the process. Users can quickly search for specific permissions by name, eliminating the need to manually scroll through the extensive list.



Examples of Available Permissions

Permissions available for assignment include, but are not limited to:

- Can Delete Project
- Can Delete Question
- Can Delete Resource Note
- Can Delete Task
- Can Delete Workspace
- Can Download File
- Can Download Report
- Can Edit Main Settings
- Can Edit Project
- Can Edit Question
- Can Edit Response Dataset
- Can Export

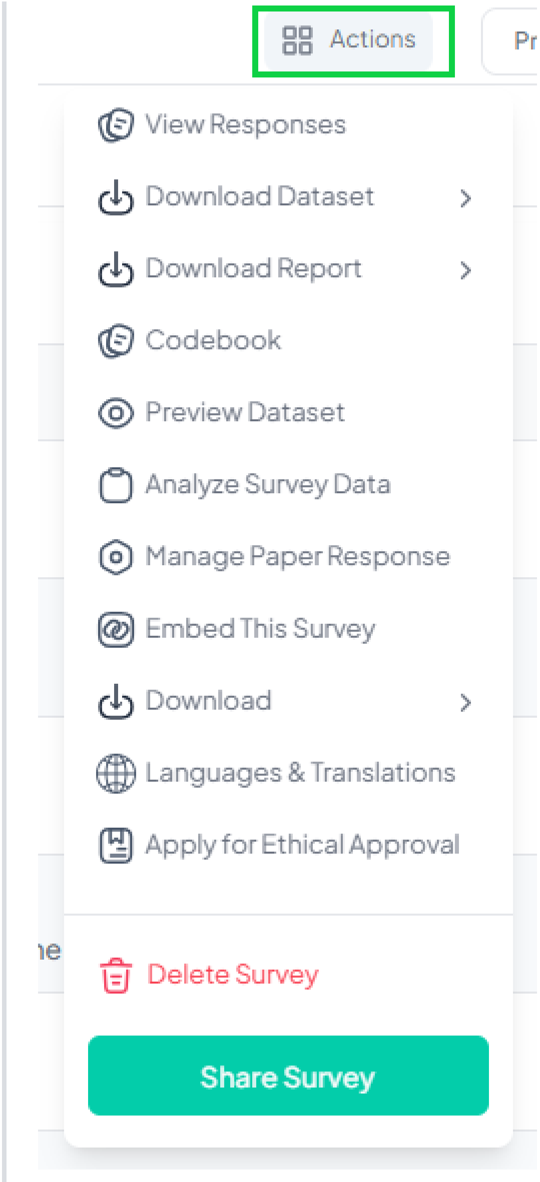
- Can Import External File
- Can Invite Collaborator
- Can Launch Project
- Can Launch Survey
- Can Link Resource

Conclusion

The **Manage Contributors** feature ensures effective project collaboration by providing intuitive tools for managing team roles, permissions, and statuses. It supports transparency, accountability, and structured teamwork throughout the research lifecycle.

Getting Started / Data Collection / Survey Design / Actions

The **Actions** dropdown menu in the Data Collection Module on the Chisquares platform serves as the central hub for managing all aspects of a survey. It provides users with streamlined access to essential tools for handling survey data—ranging from viewing and analyzing responses to downloading datasets and reports. Users can also manage offline responses, apply for ethical approval, embed surveys on external platforms, translate questionnaires, and share or delete surveys. Each feature within the menu is designed to enhance workflow efficiency and ensure data integrity throughout the research process.



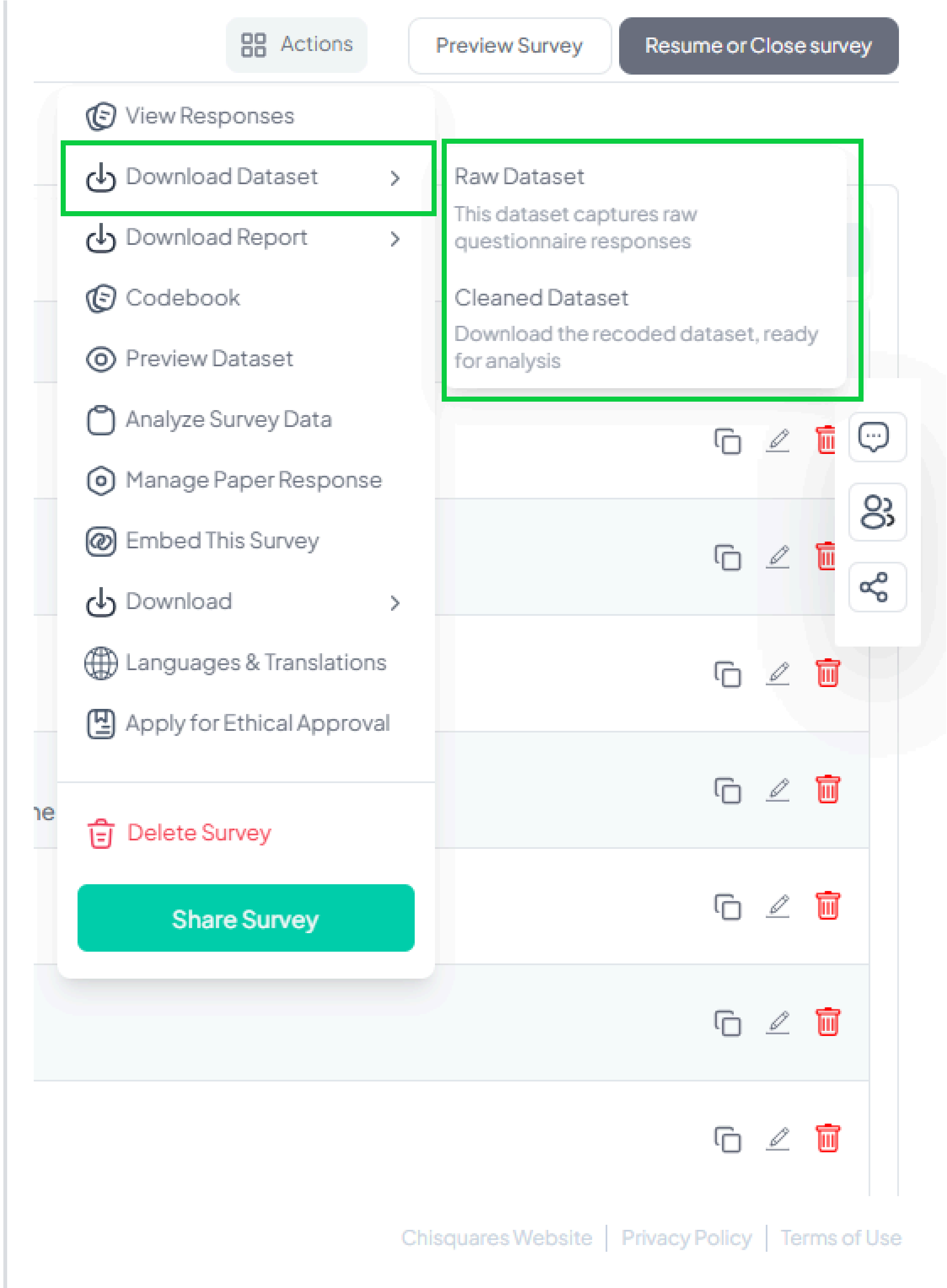
1. View Responses

This feature allows users to access and review collected survey responses in a clear, structured format. It enables easy browsing of individual submissions and provides tools for analyzing the data to uncover patterns, trends, and actionable insights. Whether for academic research, organizational decision-making, or program evaluation, this functionality supports informed analysis and evidence-based conclusions.

2. Download Dataset

Users can download survey datasets in two formats:

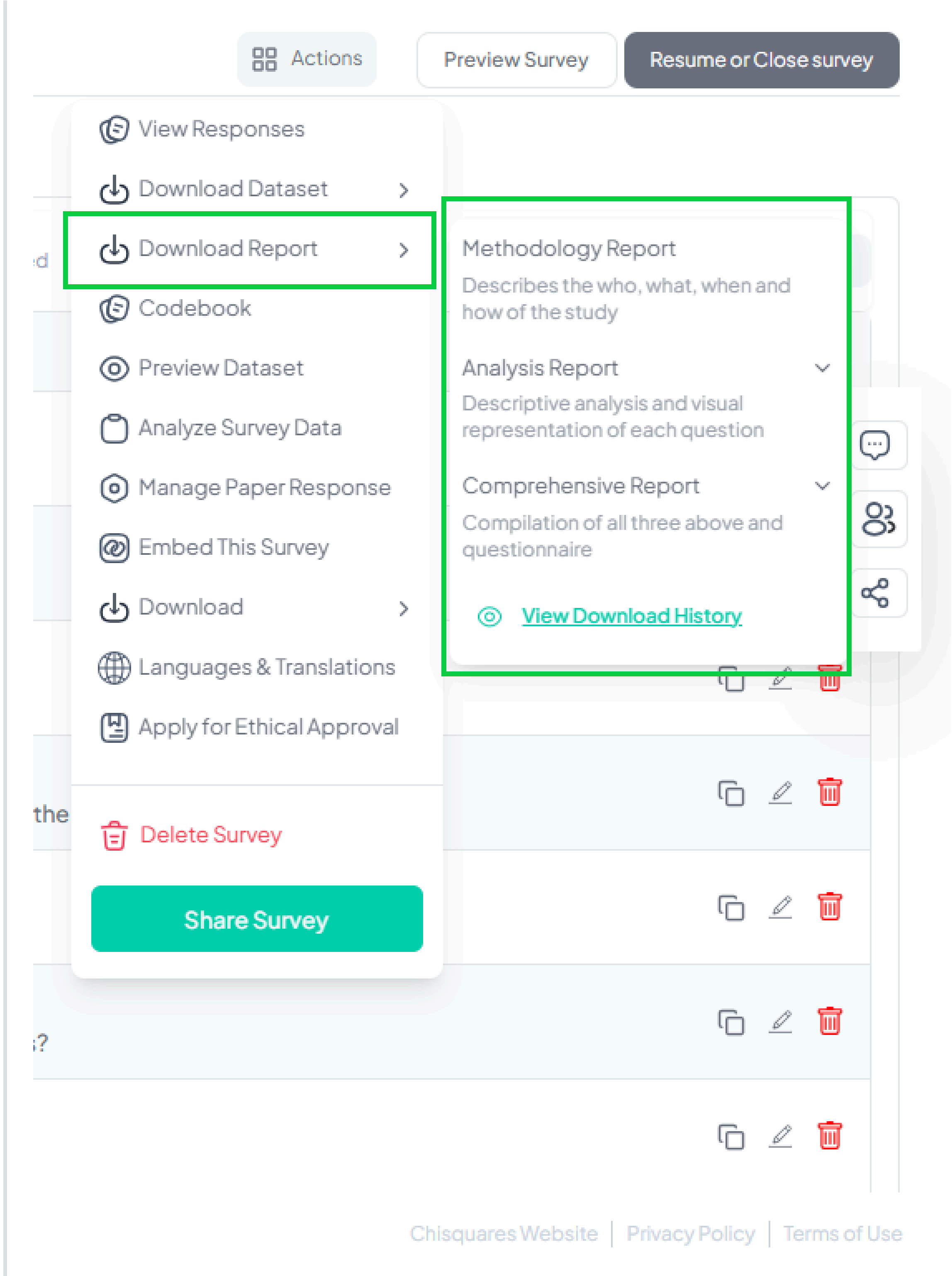
- **2.1 Raw Dataset**: Captures the original questionnaire responses without any modifications.
- **2.2 Cleaned Dataset**: Provides a recoded dataset ready for analysis, ensuring consistency and accuracy.



3. Download Report

This feature provides multiple report download options:

- **3.1 Methodology Report**: Describes the study details, including who conducted it, the purpose, methodology, and timeline.
- **3.2 Analysis Report**: Provides a descriptive analysis and visual representation of survey responses.
  - *3.2.1 Download for a subset of the population*
  - *3.2.2 Download for the whole population*
- **3.3 Comprehensive Report**: Includes all the above reports plus the questionnaire.
  - *3.3.1 Download for a subset of the population*
  - *3.3.2 Download for the whole population*
- **3.4 View Download History**: Track and re-download previously generated reports. A notification appears when a download is initiated, and completed files are accessible in the history table.


Actions
Preview Survey
Resume or Close survey
View Responses
Download Dataset
Download Report
Codebook
Preview Dataset
Analyze Survey Data
Manage Paper Response
Embed This Survey
Download
Languages & Translations
Apply for Ethical Approval
Delete Survey
Share Survey
Methodology Report
Describes the who, what, when and how of the study
Analysis Report
Descriptive analysis and visual representation of each question
Comprehensive Report
Compilation of all three above and questionnaire
View Download History
Chisquares Website
Privacy Policy
Terms of Use

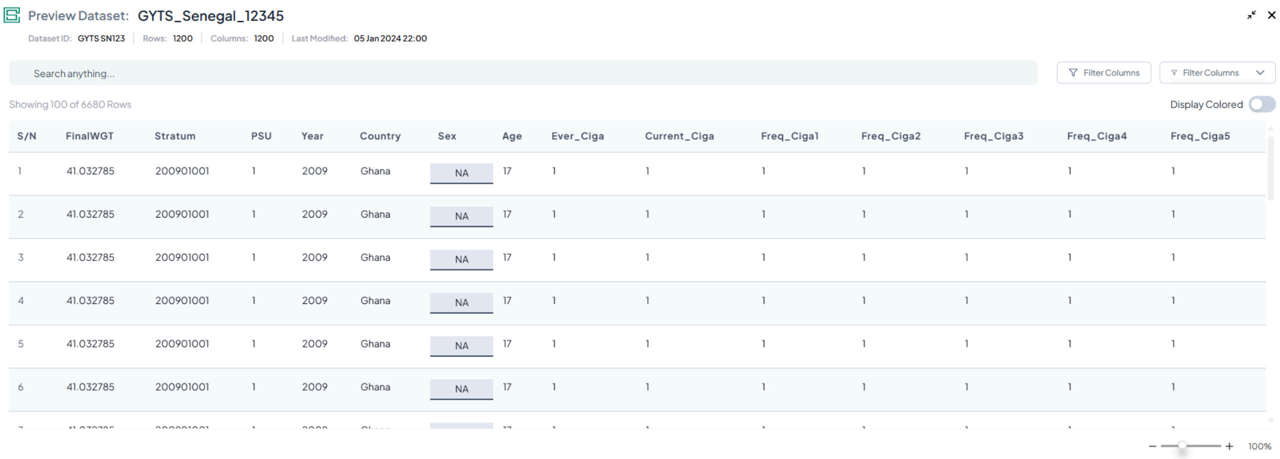
4. Codebook

The Codebook is a central tool for reviewing and managing variables in an uploaded dataset. It provides an immediate overview of the dataset's structure, including file details, variable summaries, and missing data. Users can explore individual variables, view descriptive statistics, and perform actions like renaming, recoding, changing data types, cloning, or visualizing variables. Notes and searchable tags can be added for organization, and all actions are logged for traceability. While all collaborators can view the Codebook, only users with edit privileges can modify variables. It streamlines data preparation and supports collaborative, transparent analysis.

5. Preview Dataset

Allows users to preview dataset details such as:

- Dataset ID
- Number of rows and columns
- Last modified date
- Search and filter functionality
- Zooming in and out for better visualization



6. Analyze Survey Data

This feature enables users to analyze survey data using built-in analytical tools. It supports various types of data analysis based on collected responses and offers multiple import options tailored to different data sources.

Import Options:

1. Upload Datasets

- Upload files from your local device.
- Supported formats: CSV, XLSX, JSON.

2. Import Dataset from Your Survey

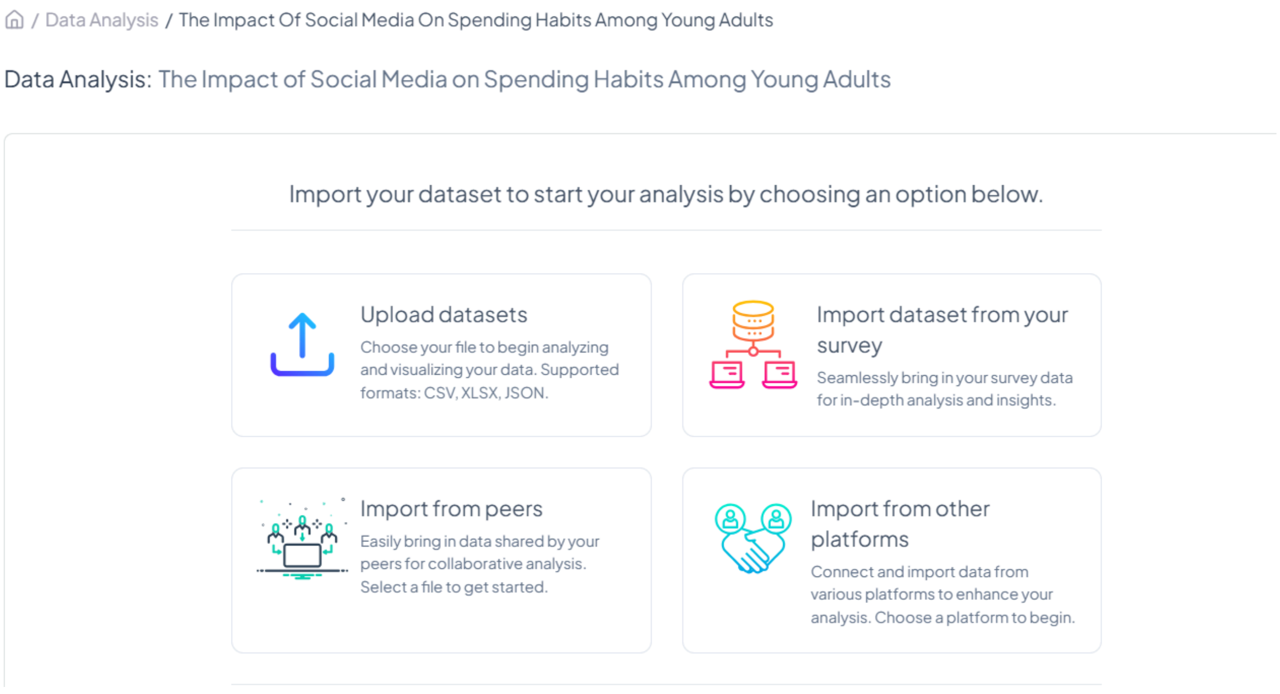
- Seamlessly import data collected via surveys.
- Designed for in-depth analysis of survey responses.

3. Import from Peers

- Bring in datasets shared by collaborators.
- Ideal for team-based or group research projects.

4. Import from Other Platforms

- Connect to external sources or tools to fetch data.
- Supports third-party data integrations for broader analysis.

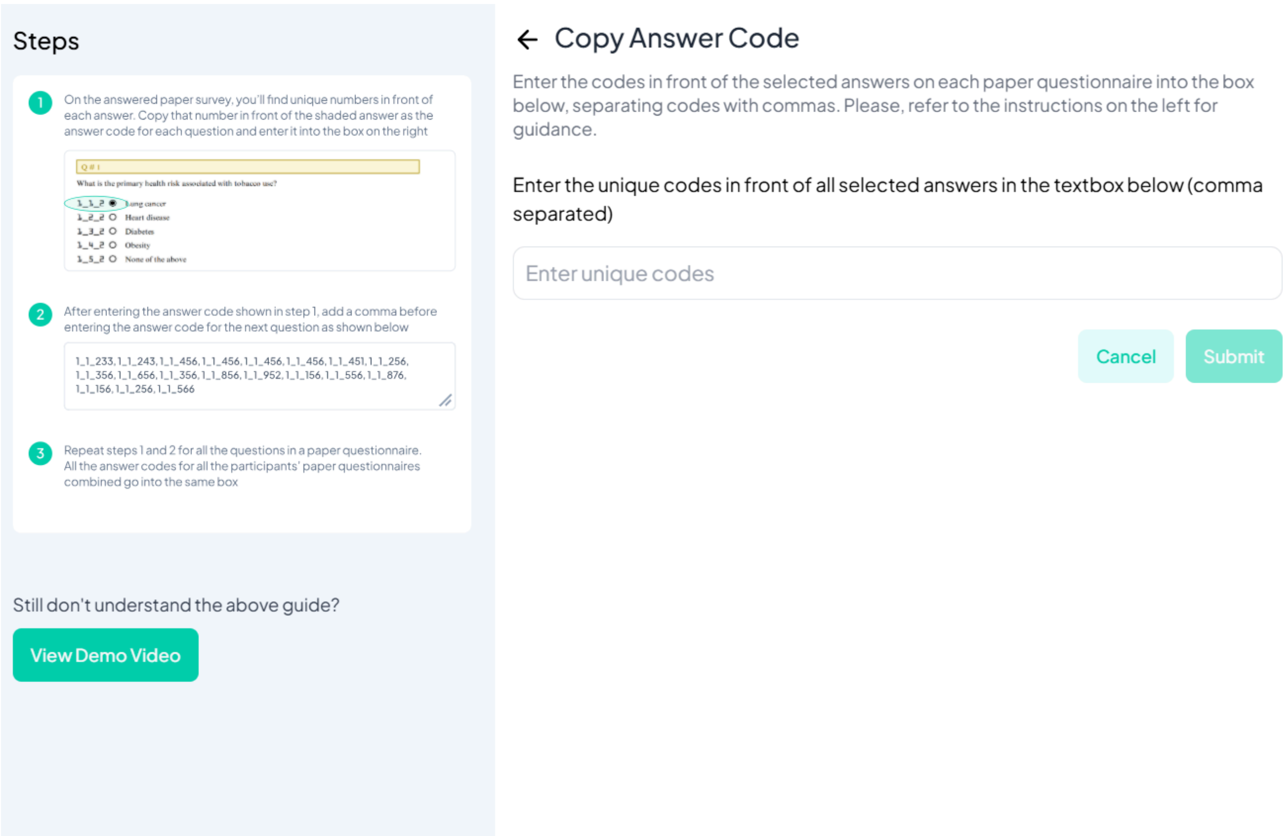


7. Manage Paper Response

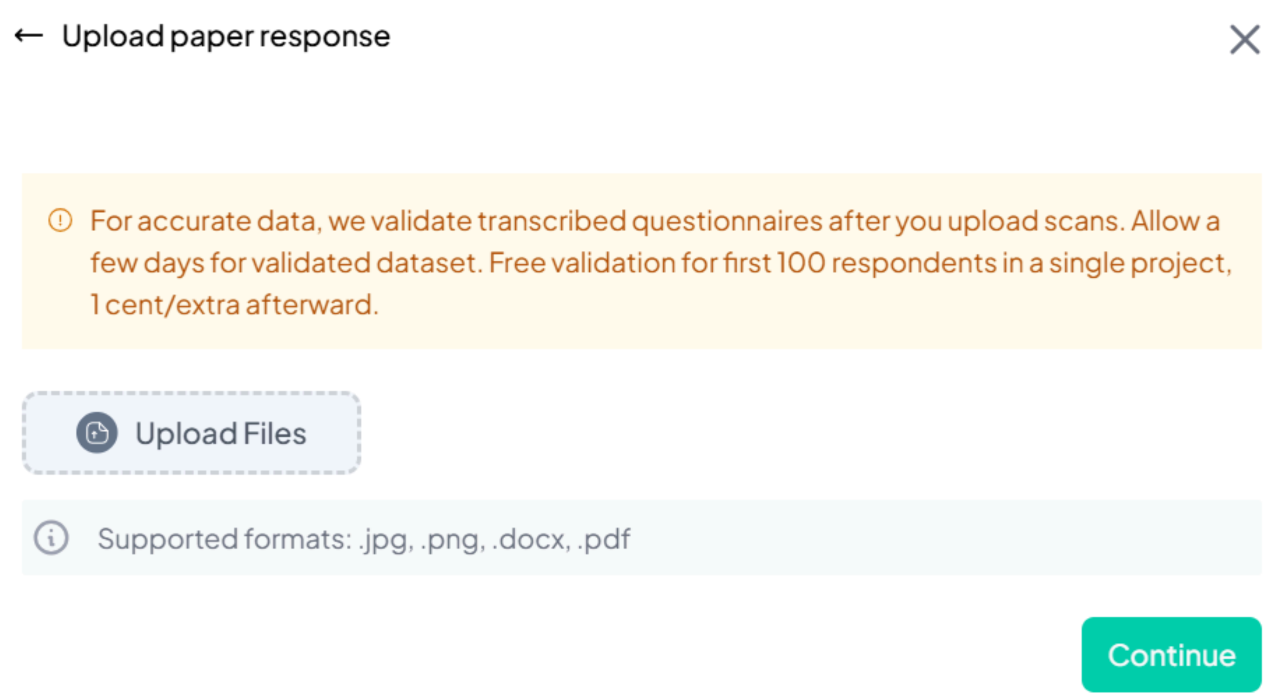
The Manage Paper Response feature is specifically designed to enable users to submit, monitor, and organize responses that were collected through traditional paper-and-pen questionnaires. This functionality ensures that manually gathered data can be seamlessly integrated into the digital analysis workflow, allowing for efficient tracking and management of offline survey responses.

There are two basic ways of submitting these;

- Using the copy answer code: This method allows users to enter responses from paper-based questionnaires by inputting unique answer codes into the designated text box, separated by commas. The left panel provides step-by-step instructions along with a visual example to guide the process. The interface includes Cancel and Submit buttons to facilitate data entry and submission.



- Upload paper response: This approach allows users to upload scanned or transcribed copies of paper-based questionnaires. Users can upload files in supported formats including .jpg, .png, .docx, and .pdf by clicking the Upload Files button. A notification at the top informs users that uploaded questionnaires will be validated for data accuracy. The system offers free validation for the first 100 respondents in a single project, with a nominal fee (1 cent per response) for any additional entries. Once files are uploaded, users can proceed by clicking the Continue button.

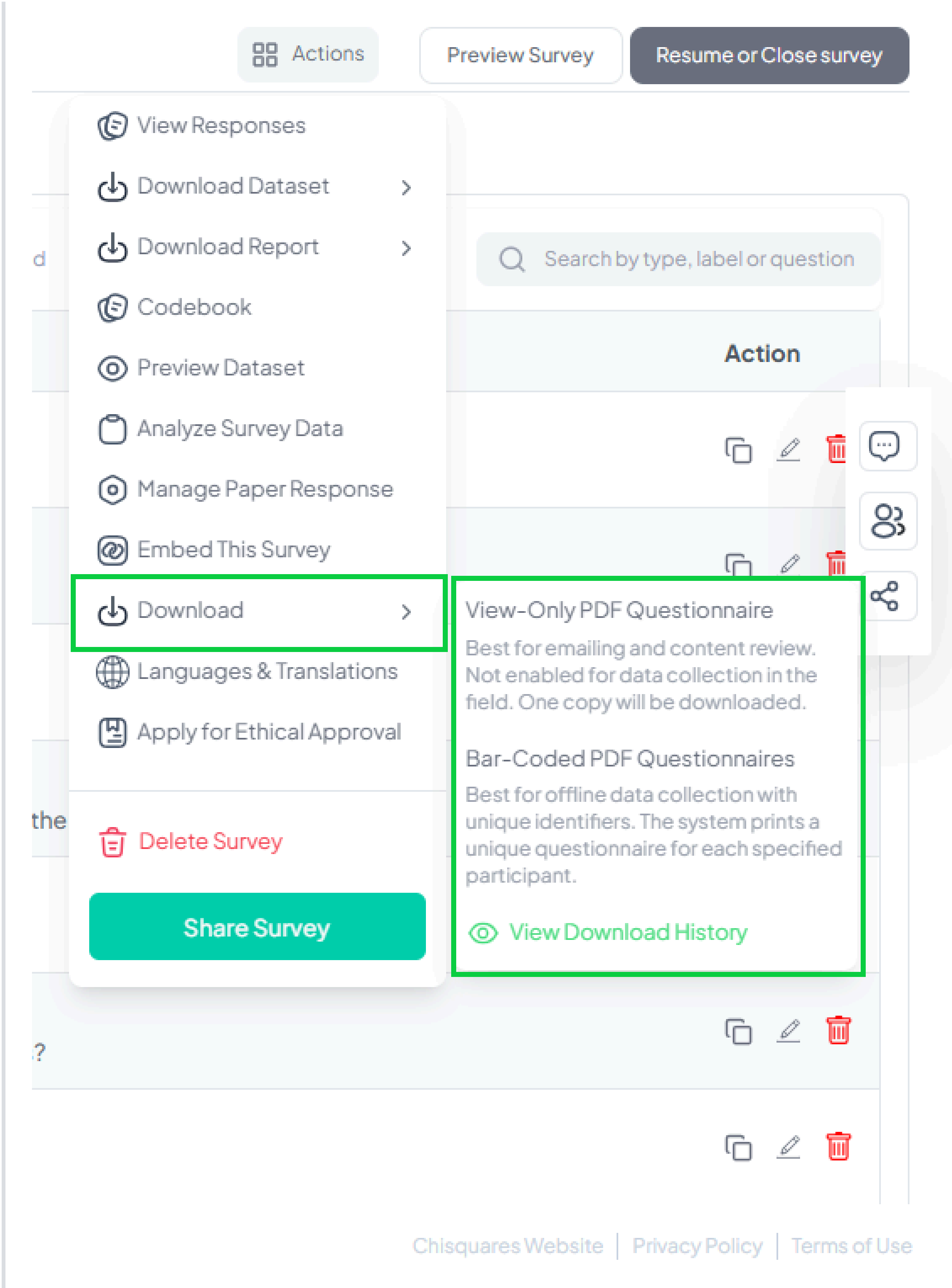


8. Download

Menu options for downloading the survey questionnaire:

- **8.1 View-Only PDF Questionnaire**: Best for emailing and content review (not suitable for data collection).

- **8.2 Bar-Coded PDF Questionnaire**: Suitable for offline data collection with unique identifiers for each participant.



9. Language and Translation

The **Language and Translation** function allows users to manage multilingual versions of their survey questionnaires. This feature supports manual translation, template-based translation, and AI-powered translation, depending on the user's subscription plan.

9.1 Language Settings Panel Overview

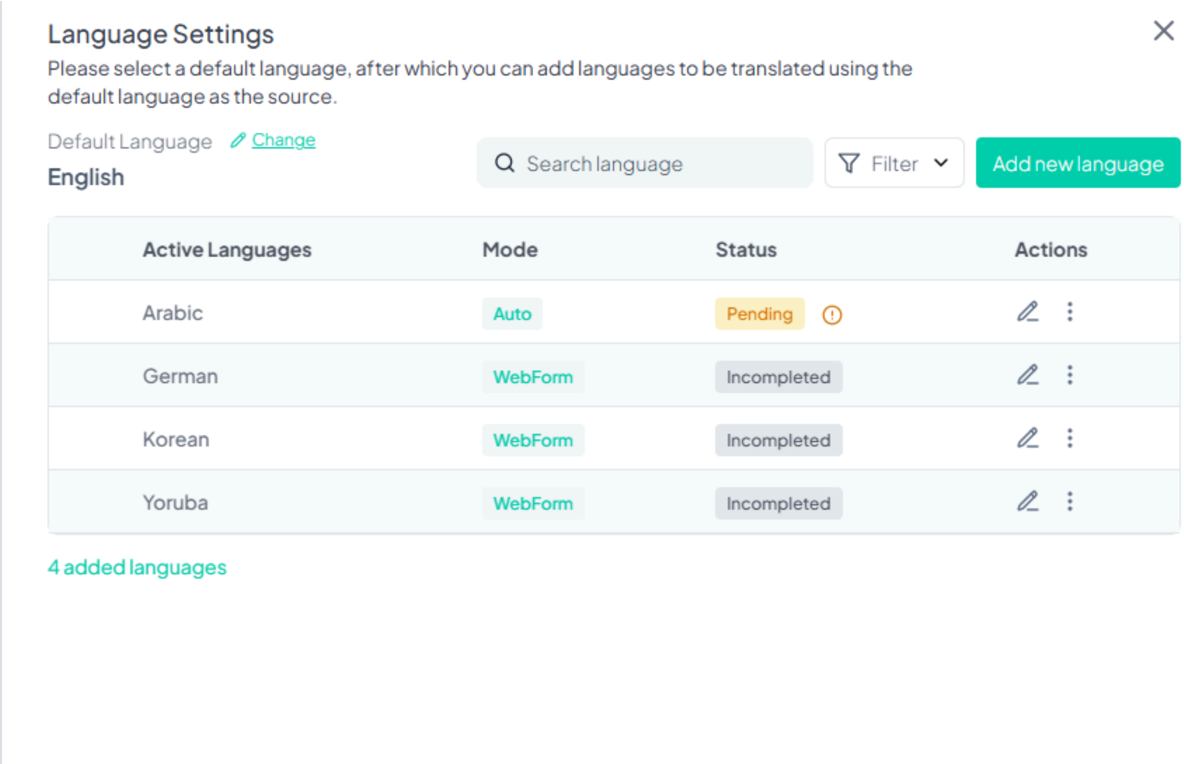
The panel includes a table that provides a summary of all translations. The table includes the following columns:

Column	Description
Active Languages	Lists all available languages in the project.
Mode	Indicates the translation mode: Manual, Template, or AI.
Status	Shows translation completion status: *Complete* or *Incomplete*.
Actions	Offers actions based on mode: • Download as PDF • Copy Translation • Rename Translation • Remove Language

Users can also:

- **Change the default language** by clicking the **Change** link.

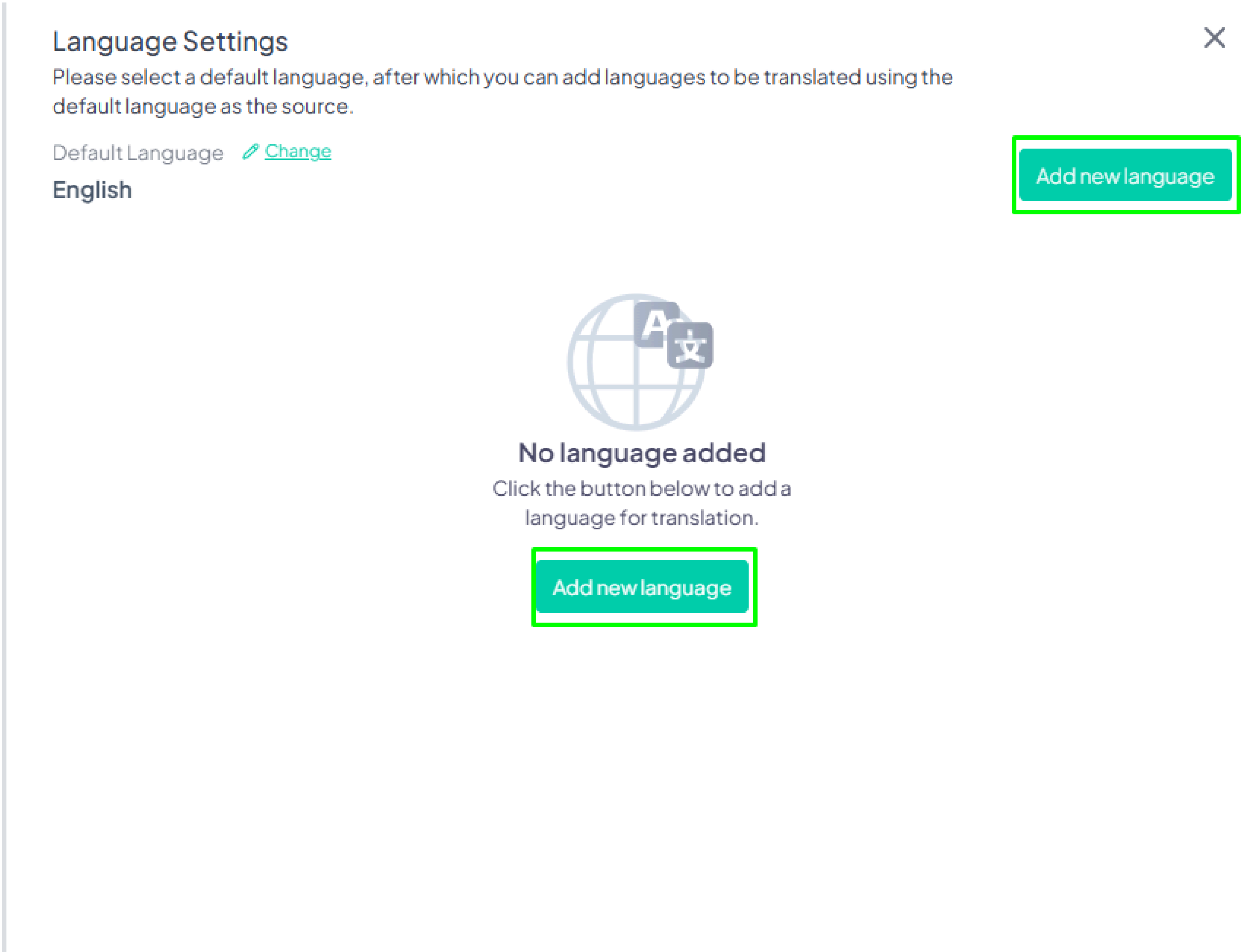
- Use the **Search bar** to locate items by keyword.
- Apply **Filters** using the filter dropdown with options: `All`, `Completed`, `Incompleted`, `Pending`, `Processing`, `Failed`.

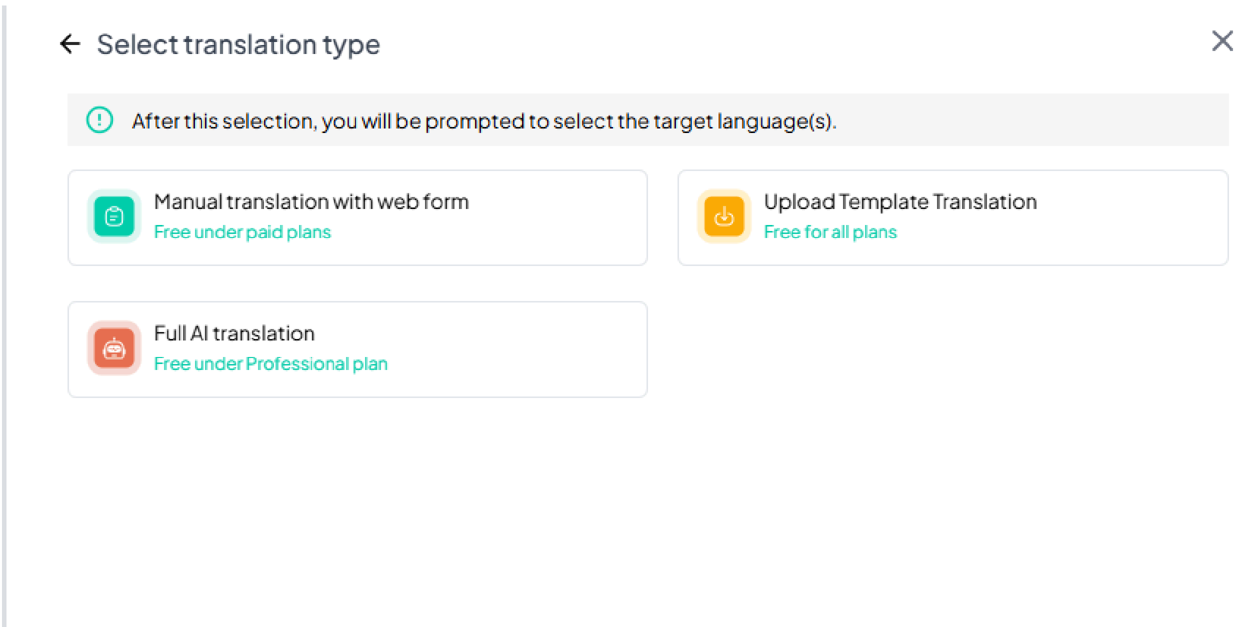


9.2 Adding a New Language

To add a new translation:

1. Click the **Add New Language** button.
2. Choose from the three translation modes (tabs):
   - **Manual Translation with Web Form** *(Free under paid plans)*
   - **Upload Template Translation** *(Free for all plans)*
   - **Full AI Translation** *(Free under Professional plan)*


Language Settings
Please select a default language, after which you can add languages to be translated using the default language as the source.
Default Language
Change
English
Add new language
No language added
Click the button below to add a language for translation.
Add new language


Select translation type
After this selection, you will be prompted to select the target language(s).
Manual translation with web form
Free under paid plans
Upload Template Translation
Free for all plans
Full AI translation
Free under Professional plan

9.2.1 Manual Translation with Web Form

This method enables manual input for each translatable item in your survey.

- Click **Start** under the manual tab to begin.
- Choose the **Target Language**.
- A translation interface loads, showing:
  - **Source Language Items** on the left.
  - **Editable translation fields** on the right.

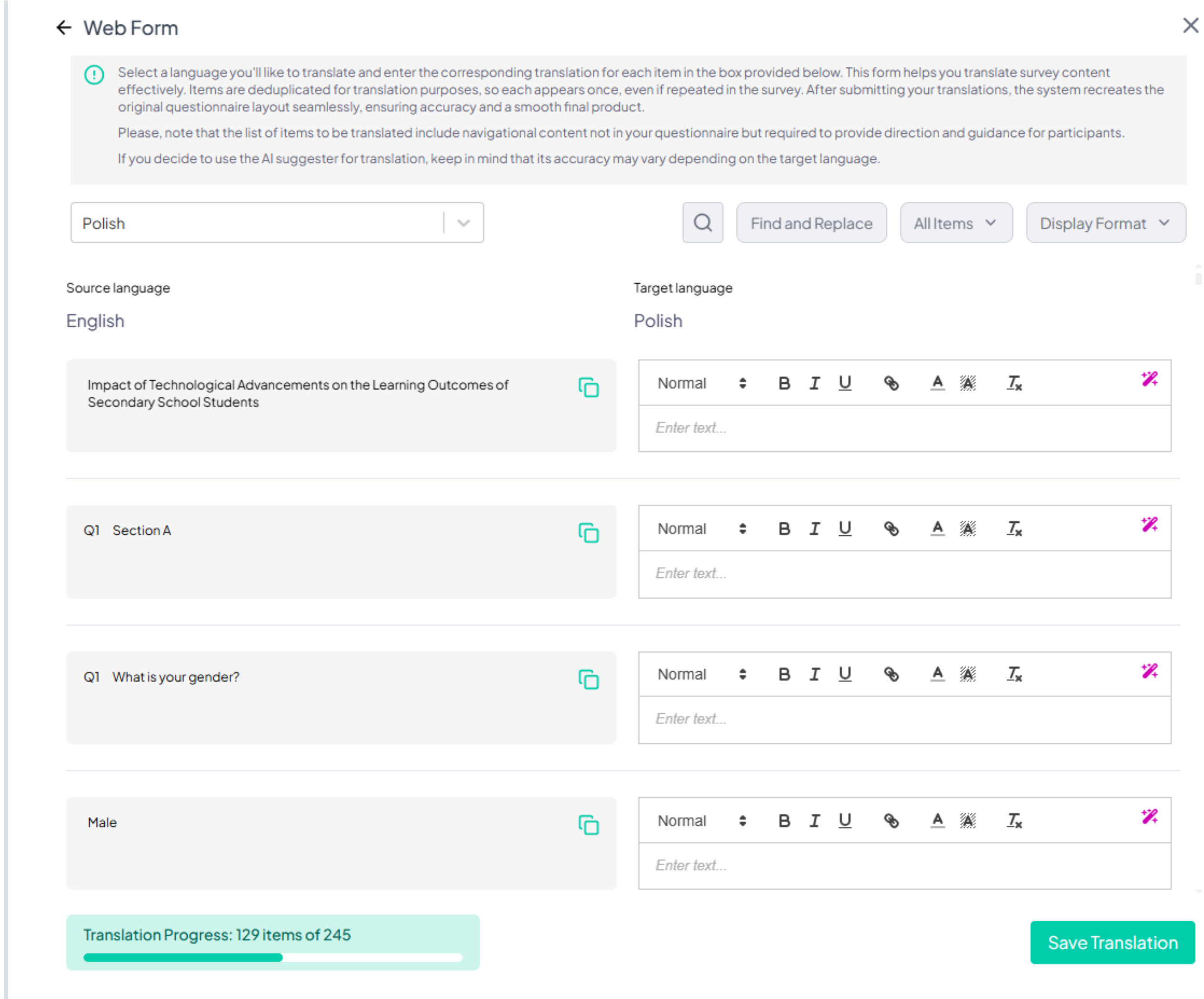
Features:

- **Rich Text Editor**: Offers formatting tools (bold, italic, underline, link embedding).
- **Magic Wand Icon**: AI translation suggestion for each item.
- **Search Button**: Enables keyword search in both columns.
- **Find and Replace**: Bulk update phrases across the target text.
- **Filter Translated/Untranslated Items**: For workflow optimization.
- **Display Format Selector**:
  - Full Questionnaire (maintains original order)
  - Reduced Questionnaire (skips duplicates)
- **Translation Progress Bar**: Tracks completion percentage.

> **Note:** System-generated text like navigation prompts is included for completeness. Duplicates are removed to streamline translation.

After translation:

- Click **Save Translation** to complete.
- Status changes to **Complete**, and the translation becomes available in the **Participant Portal**.
- You may save progress at any time and return later.



9.2.2 Upload Template Translation

This method allows offline translation using a structured CSV file.

Steps:

1. Choose or create a language.
2. Click **Download Template** to get a CSV with columns:
    - CODE FOR ITEM TYPE
    - CODE FOR ITEM SEQUENCE
    - ITEM SUBTYPE

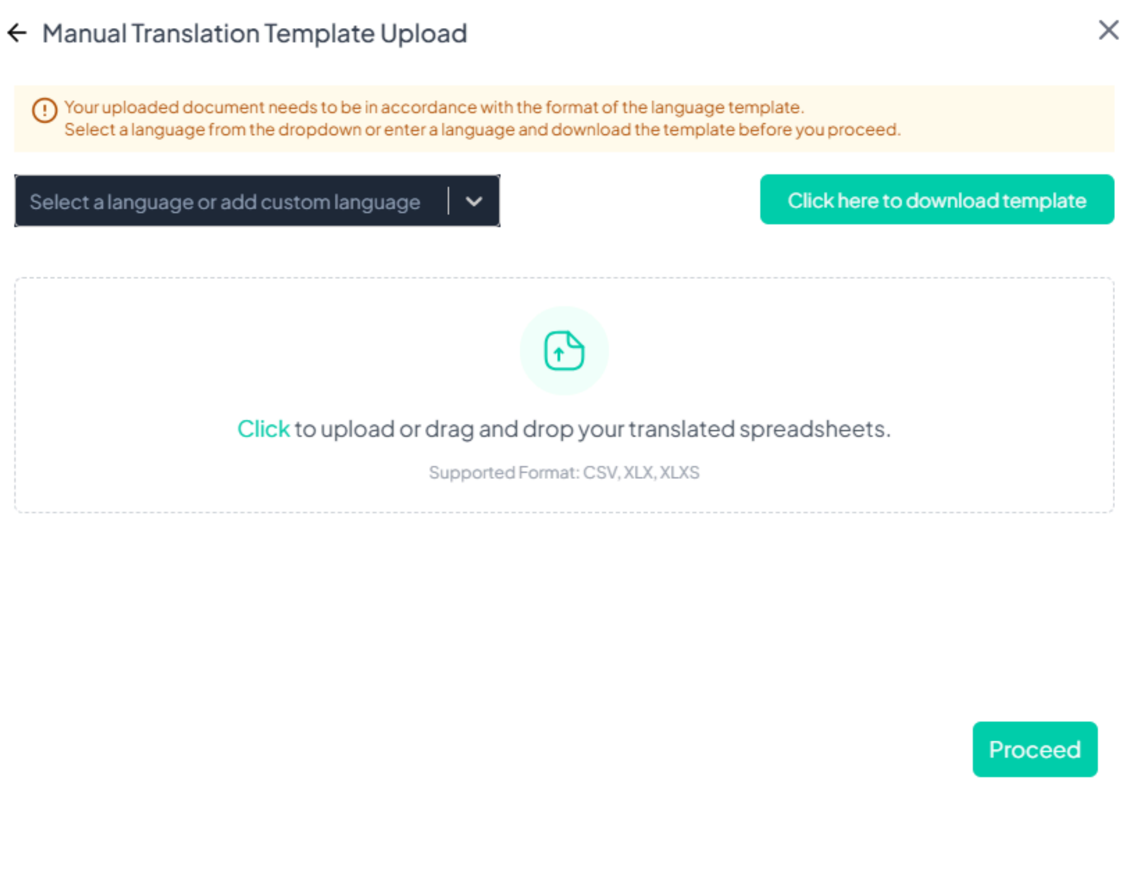
- TEXT TO BE TRANSLATED
- TRANSLATED TEXT

3. Fill in the *TRANSLATED TEXT* column.
4. Upload the file via the **Upload** button.

> **Important:** Ensure the file structure matches the template format to avoid errors.

Upon upload:

- The new language is added to the table.
- It becomes available to participants once translation is verified.



9.2.3 Full AI Translation

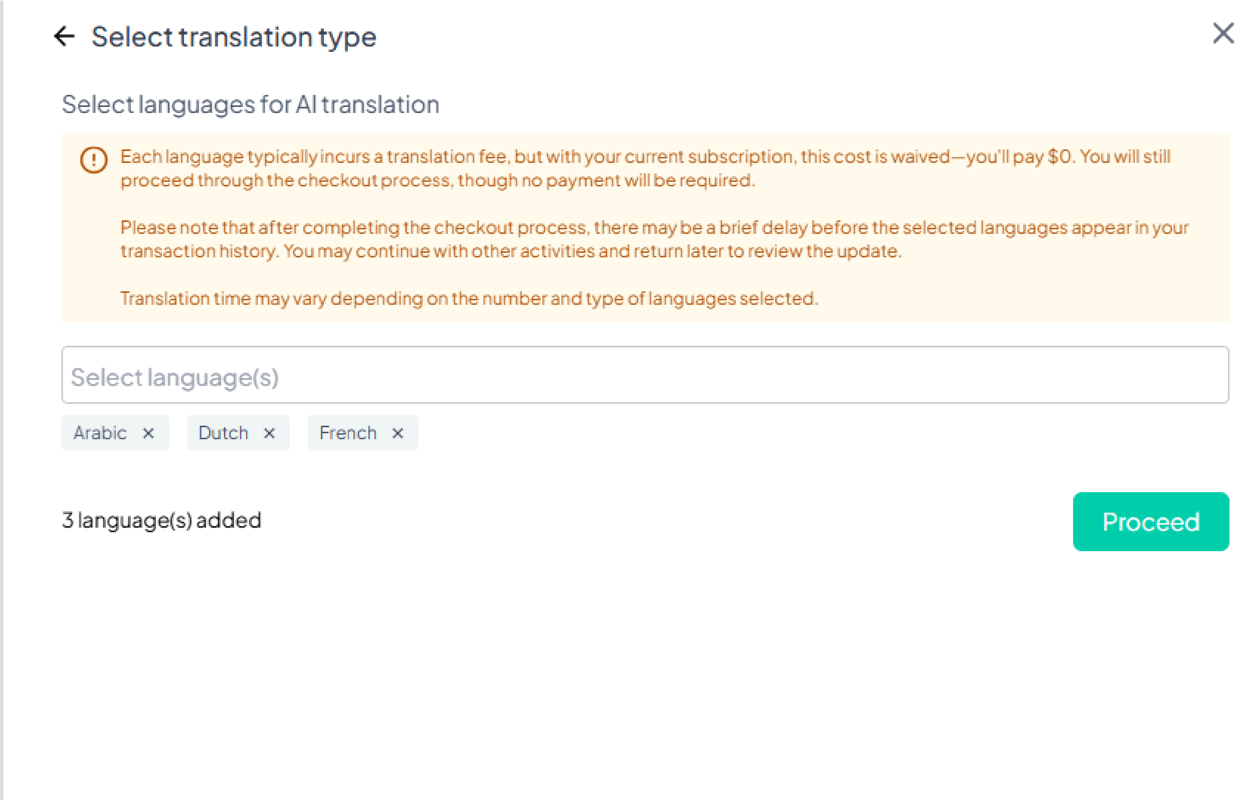
This fully automated option uses AI to translate entire surveys.

Steps:

1. Select the **Full AI Translation** tab.
2. Review the message:
   > "Each language typically incurs a translation fee, but with your current subscription, this cost is waived—you'll pay $0..."
3. Select one or more target languages.
4. Click **Proceed** to complete the checkout process (no actual payment required).

> **Note:**

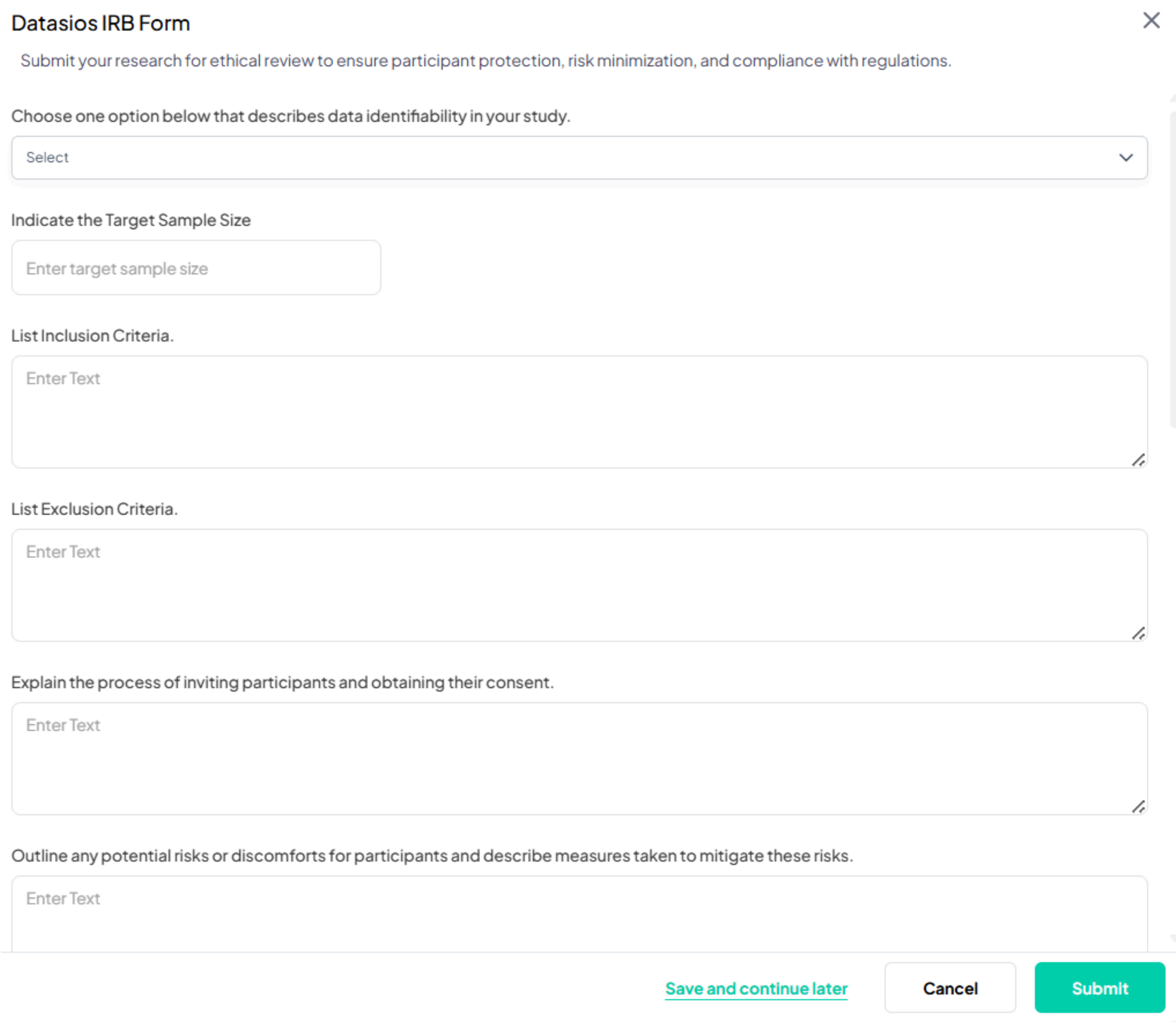
- Processing time may vary by language and survey size.
- Translations may appear after a short delay and can be accessed via the Language Settings panel.



10. Apply for Ethical Approval

Allows users to submit their research for IRB approval. The form includes fields for:

- Data identifiability
- Target sample size
- Inclusion/exclusion criteria
- Consent process
- Privacy protection measures
- Data storage and retention
- Team members and their roles
- Upload required documents: consent forms, CVs, research protocol, ethics certificates



- **Action buttons**: `Save and Continue Later`, `Cancel`, `Submit`

11. Delete Survey

Permanently delete the survey from the platform.

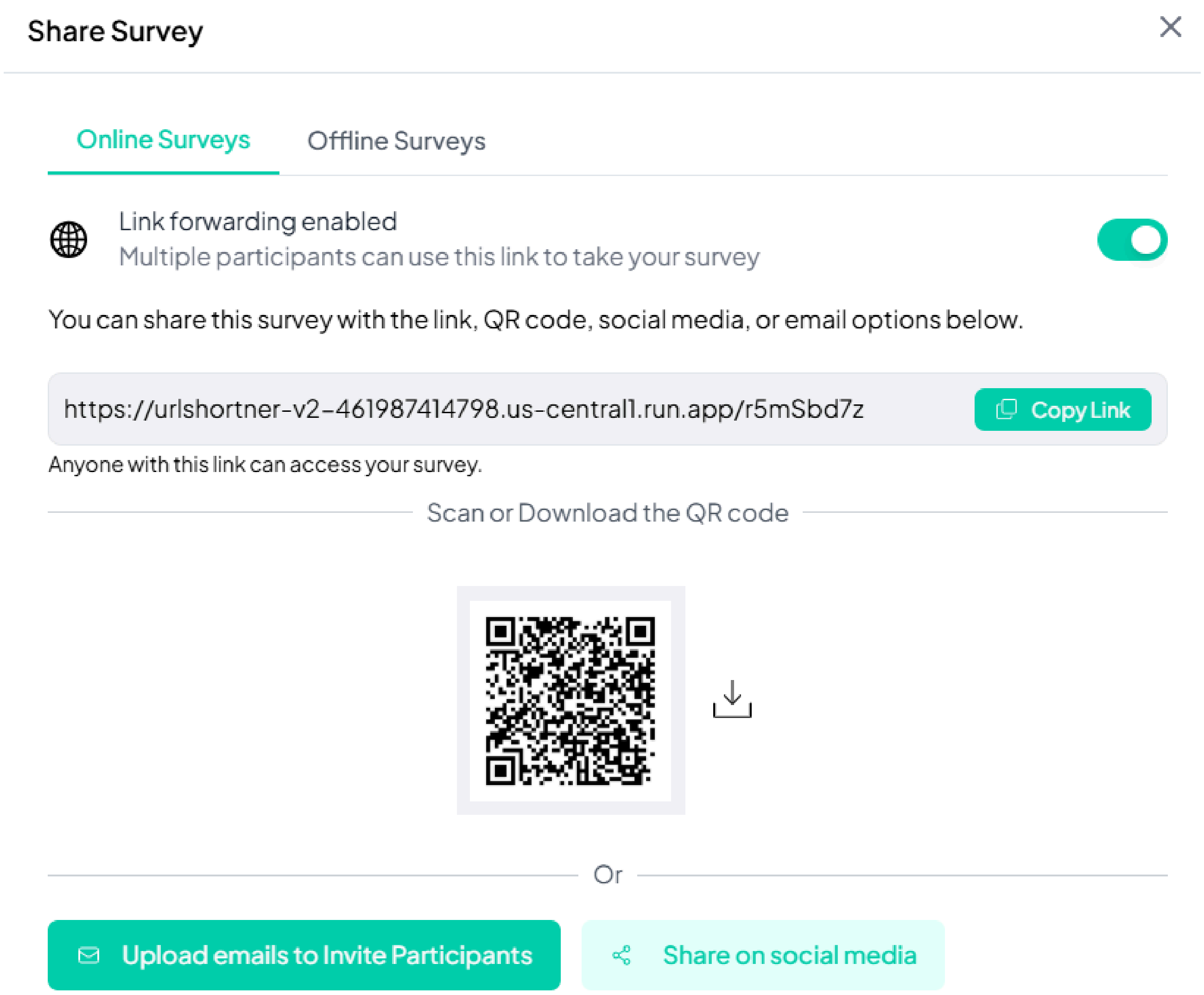
Note: *This action is irreversible.*

12. Share Survey

The Share Survey feature enables the distribution of survey content to participants through two primary methods:

1. Using the Online tab

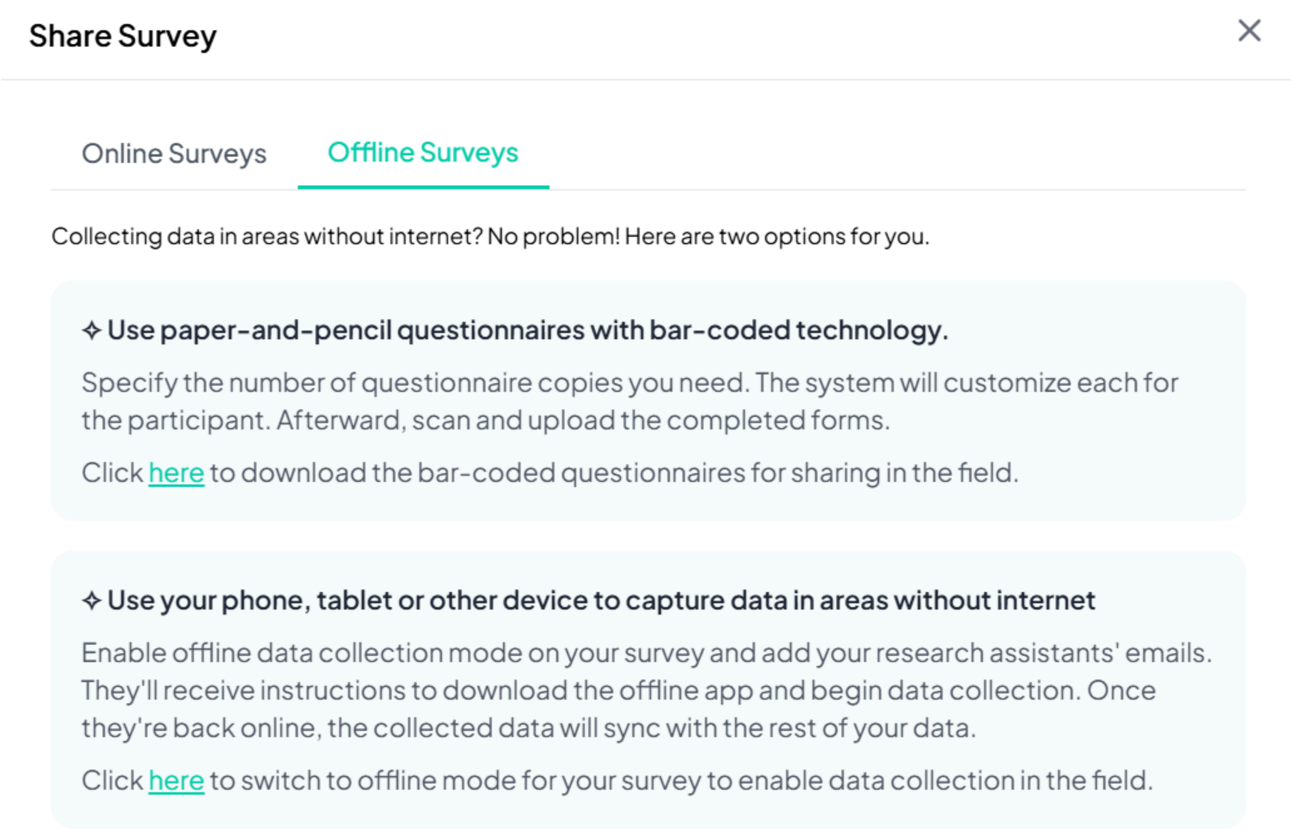
This method enables users to distribute a survey using various digital methods. With link forwarding enabled, multiple participants can access and complete the survey using the same unique URL provided. The platform generates a shareable survey link along with a corresponding QR code, allowing participants to access the survey either by clicking the link or scanning the code. Users can also choose to download the QR code for offline sharing. Additionally, Chisquares offers integrated options to upload email addresses for participant invitations or share the survey directly via social media. This streamlined interface simplifies survey distribution, making it easy to reach a wide and diverse audience through multiple access points.



- **12.1 Copy Link**: Generates a shareable URL.
- **12.2 QR Code**: Allows scanning or downloading of a QR code.
- **12.3 Upload Emails to Invite Participants**:
  - Add participant emails and manage their invitations
  - Access participant list, invitation messages, reminders, notifications
- **12.4 Share on Social Media**: Distribute the survey link via X, Facebook, Instagram, LinkedIn, and WhatsApp.

2. The Offline tab

This approach is designed to facilitate data collection in environments without internet connectivity. It offers users two flexible offline options for survey administration. The first option is to use paper-and-pencil questionnaires with bar-coded technology. Users can specify the number of copies required, and the system will customize each with unique barcodes. Once the forms are completed in the field, they can be scanned and uploaded for digital processing or their codes entered into the platform manually. The second option allows users to use a phone, tablet, or other device to capture data offline. By enabling offline data collection mode and assigning research assistants via email, users can download the necessary app and start data collection without internet access. Once the device reconnects to the internet, all collected data automatically syncs with the main project database.



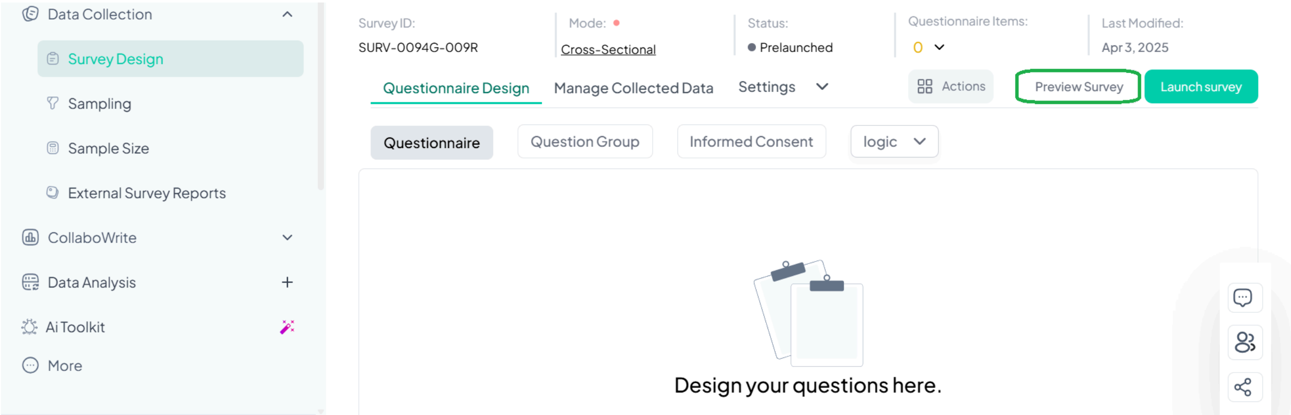
Getting Started / Data Collection / Survey Design / Preview Survey

The Preview Survey feature in Chisquares allows users to view and interact with their survey exactly as a respondent would. This tool is essential for verifying question layout, logic flow, and the overall user experience before launching the survey. By using the preview function, researchers can identify and correct potential issues, ensuring the survey is clear, functional, and ready for data collection.

Steps to Preview Your Survey

1. **Access the Survey Design Tab**

Navigate to the Survey Design tab and click on Preview Survey, as illustrated in the diagram below.



2. **Review the Preview Information Note**

Upon selecting Preview Survey, a brief informational note will appear. This note explains that the preview simulates the actual respondent experience, allowing survey designers to test and explore all survey functionalities, including submission.

- Responses submitted during the preview are not included in the final dataset.
- Preview data is refreshed every five minutes to reflect the latest changes.
- If recent edits were made, users may need to wait before previewing again to see updates.

3. **Start the Survey Preview**

Close the note, then click Start Survey to begin the preview and test the flow and functionality of your survey.

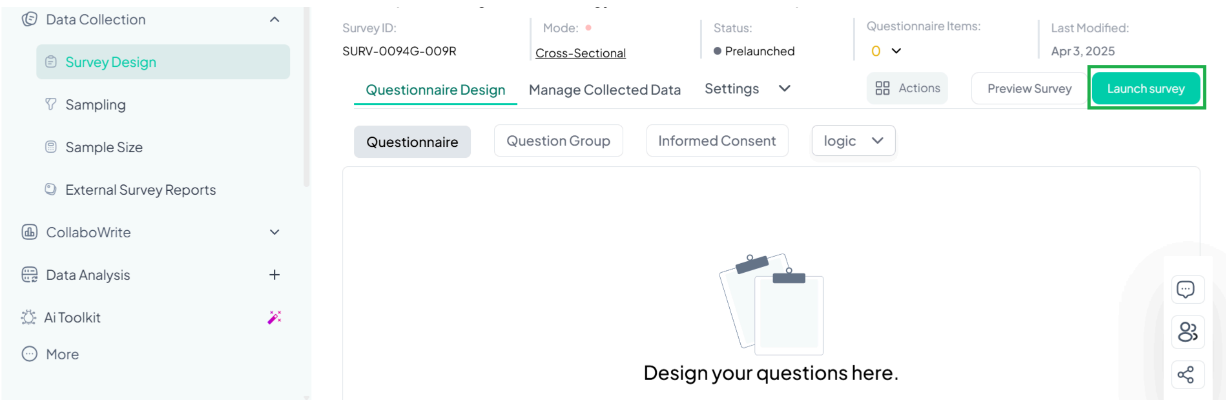
Getting Started / Data Collection / Survey Design / Launch Survey

Launching a survey refers to the process of making the survey officially active and accessible to participants. Once launched, the survey can be distributed via a shared link or through other distribution methods, allowing responses to be collected in real-time. This action marks the transition from the survey design phase to the data collection phase.

How to Launch a Survey on Chisquares

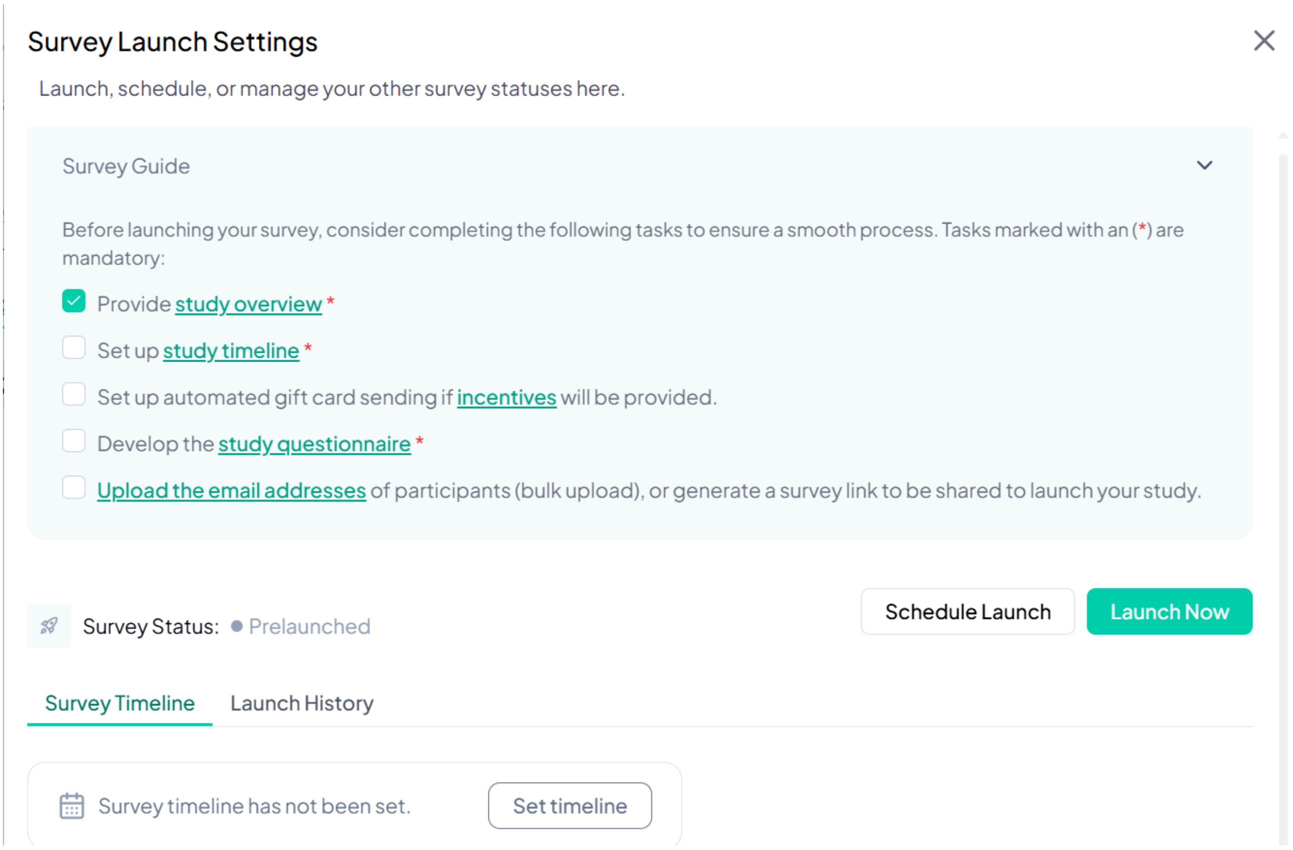
To launch a survey on the platform:

- Navigate to the Survey Design tab and select the survey you wish to launch.
- Click the Launch Survey button, as shown in the illustration below.



Before launching, users are guided through the Survey Guide, which outlines essential setup tasks. Mandatory steps are marked with an asterisk (*) and include:

- Providing a study overview
- Setting up the study timeline
- Developing the study questionnaire



Optional steps may include:

- Configuring incentive settings (e.g., automated gift card sending)
- Uploading participant email addresses for bulk invitations

Once all required tasks are completed, users may choose to either schedule the launch or click Launch Now to activate the survey immediately. The survey status will then be updated from Prelaunched to Launched accordingly.

Launch History

The Launch History section logs all key actions related to the survey's deployment. This includes:

- Launching the survey
- Pausing or resuming data collection
- Closing the survey

Any activity performed in relation to the launching will be recorded here, providing a clear timeline for reference and tracking.

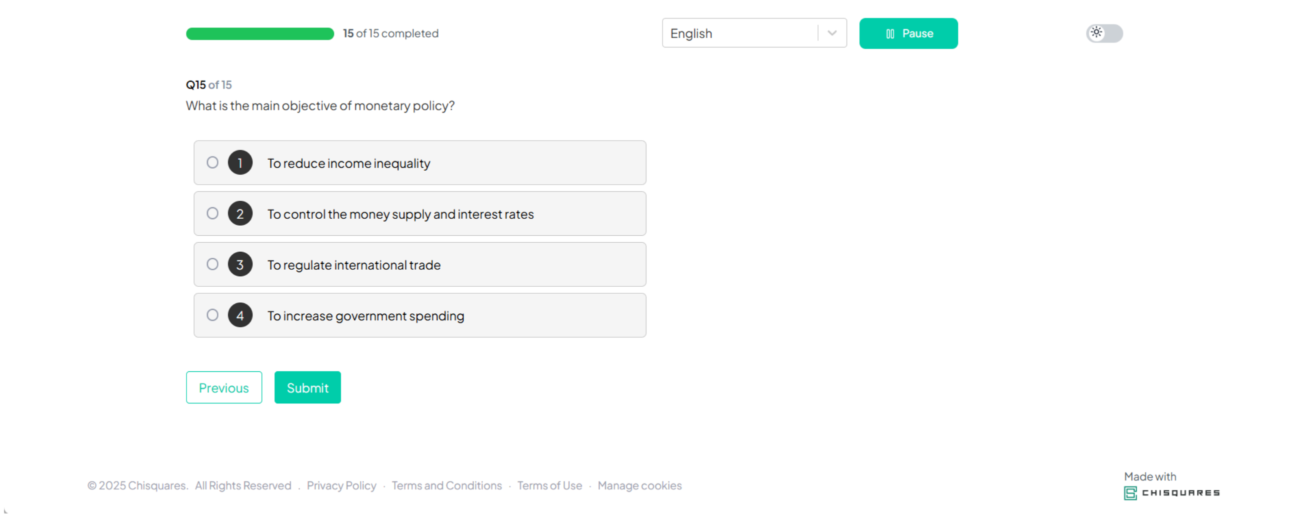
Getting Started / Data Collection / Survey Design / Participant Portal / All Question types

Multiple Choice Question

A simple single-select multiple-choice question that offers several answer options, allowing the participant to choose only one. It is designed to identify a clear preference or factual response, promoting precise and unambiguous data collection—ideal for categorical analysis.

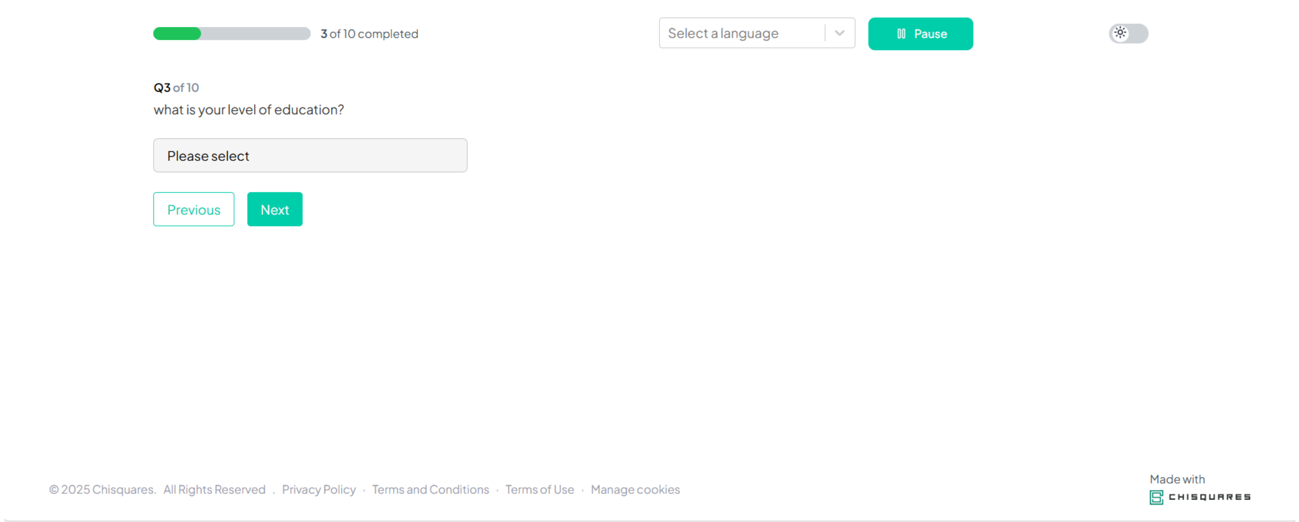
What the participant is expected to do:

Select one correct or preferred answer from the options provided (e.g., What is the main objective of monetary policy?).



Dropdown Question

A dropdown question presents a list of predefined options in a compact menu, allowing the respondent to select only one. This format is ideal for demographic questions or when presenting a long list of mutually exclusive options. It helps conserve space and keeps the interface clean, especially on mobile devices.

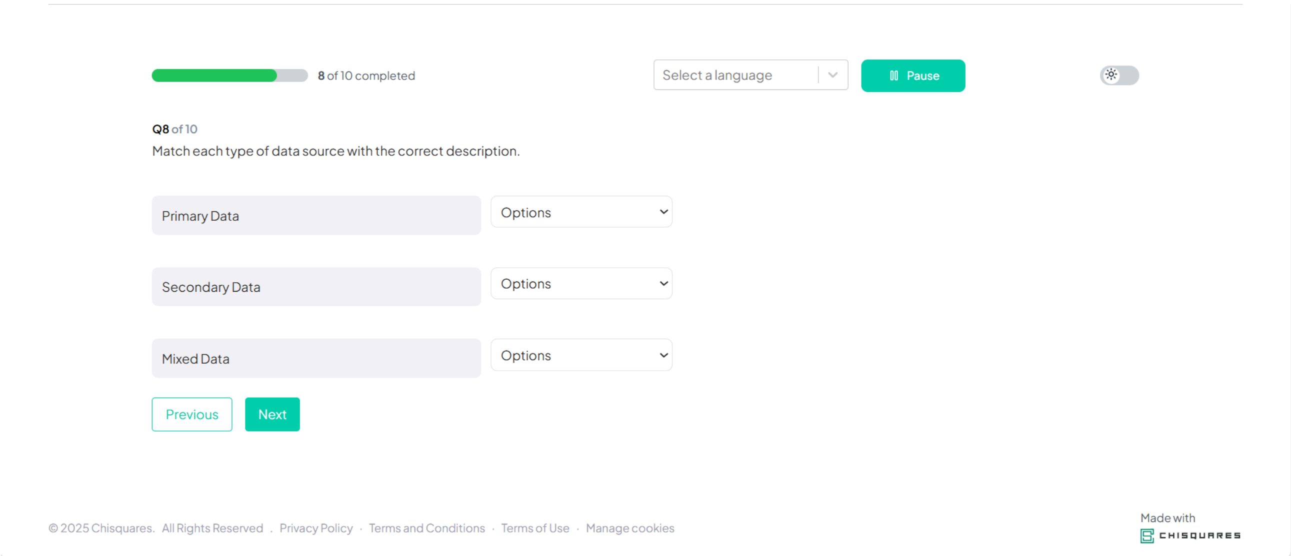


What the participant is expected to do:

Select your appropriate response (e.g., level of education) from the dropdown list. Only one option can be chosen to proceed.

Item Matching Question

Item matching questions ask participants to pair related items from two lists. This is often used to test understanding or knowledge. This format is valuable for gauging comprehension, especially in educational or technical surveys. It provides insight into how well a participant can associate concepts.

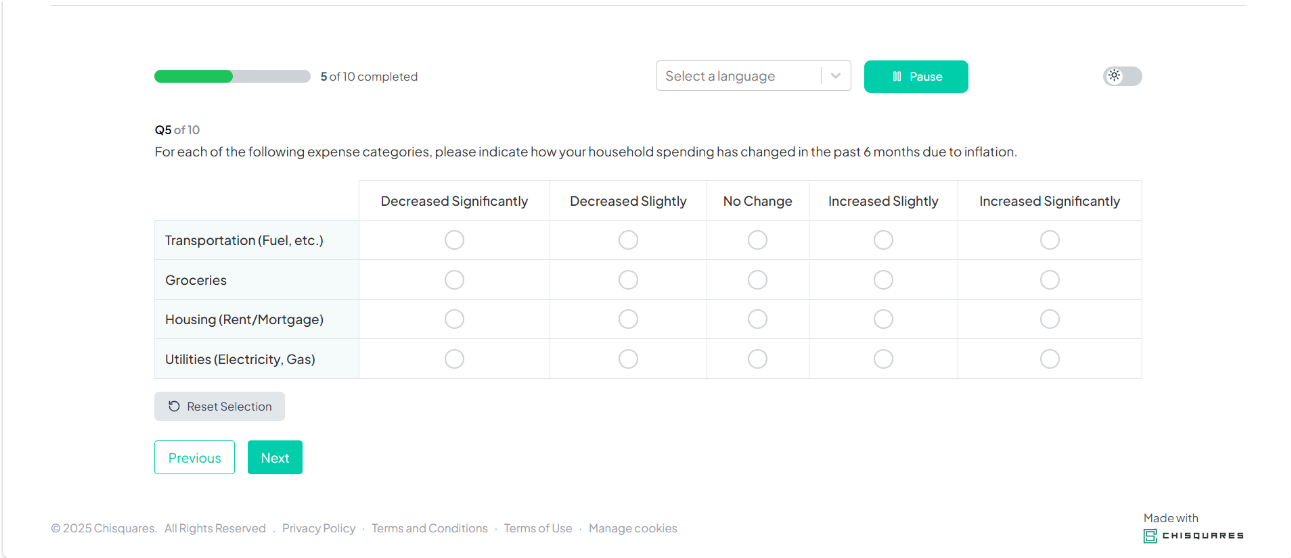


What the participant is expected to do:

Match each item on the left (e.g., types of data) with the most appropriate description from the dropdown options on the right.

Matrix Question

Matrix questions display a grid of items (rows) and response options (columns) that share a consistent scale, such as agreement level or frequency. This format allows for efficient data collection across multiple related items, encouraging consistency and enabling easy comparison.

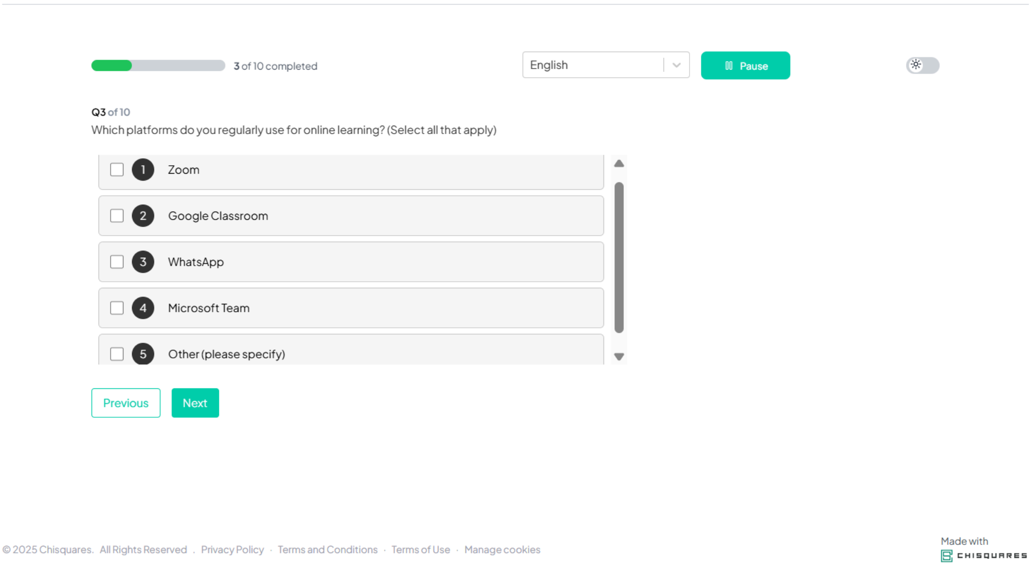


What the participant is expected to do:

Rate each item (e.g., expense categories) using the provided scale (e.g., from “Decreased Significantly” to “Increased Significantly”). Choose one response per row.

Multiple Response Question

This question type allows participants to select multiple answers from a list of options. Useful for capturing real-world behavior where multiple answers may apply (e.g., platforms used for online learning). It provides a more complete view of participant habits and preferences. Useful for capturing real-world behavior where multiple answers may apply (e.g., platforms used for online learning). It provides a more complete view of participant habits and preferences.

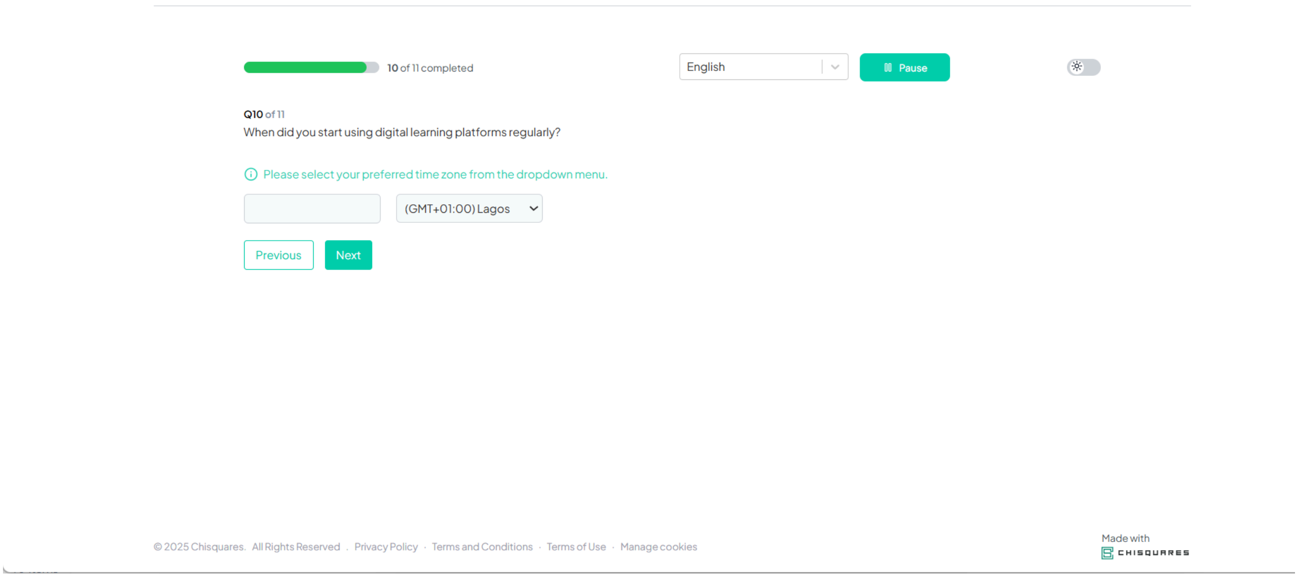


What the participant is expected to do:

Check all the options that apply to you. You may select one or more platforms that you regularly use.

Date/Time Question

A question format that allows participants to input a specific date (and sometimes time), typically using a calendar picker. To capture temporal data such as start dates, birthdates, or important timelines relevant to the study. Date-based responses are essential for time-sensitive analysis, such as tracking behavioral trends or cohort analysis.

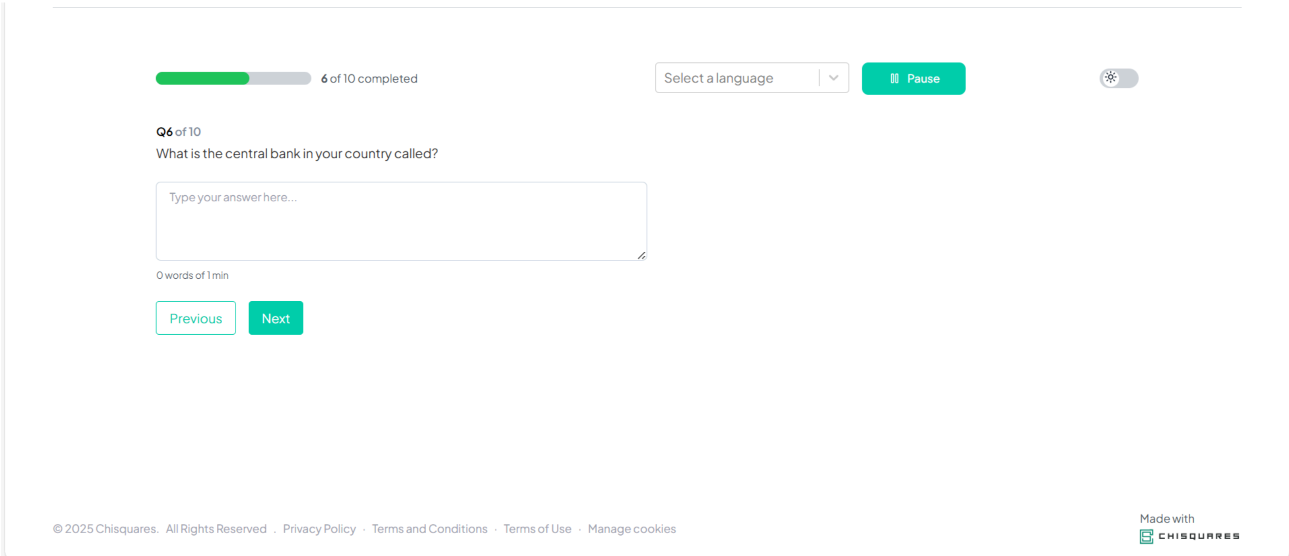


What the participant is expected to do:

Select the date when you started using digital learning platforms regularly using the date picker. You may also be asked to confirm your time zone.

Multi-Line text Response Question

Open-ended questions provide a text box for participants to respond in their own words. This format captures rich, qualitative insights and allows participants to elaborate on their thoughts, experiences, or opinions.

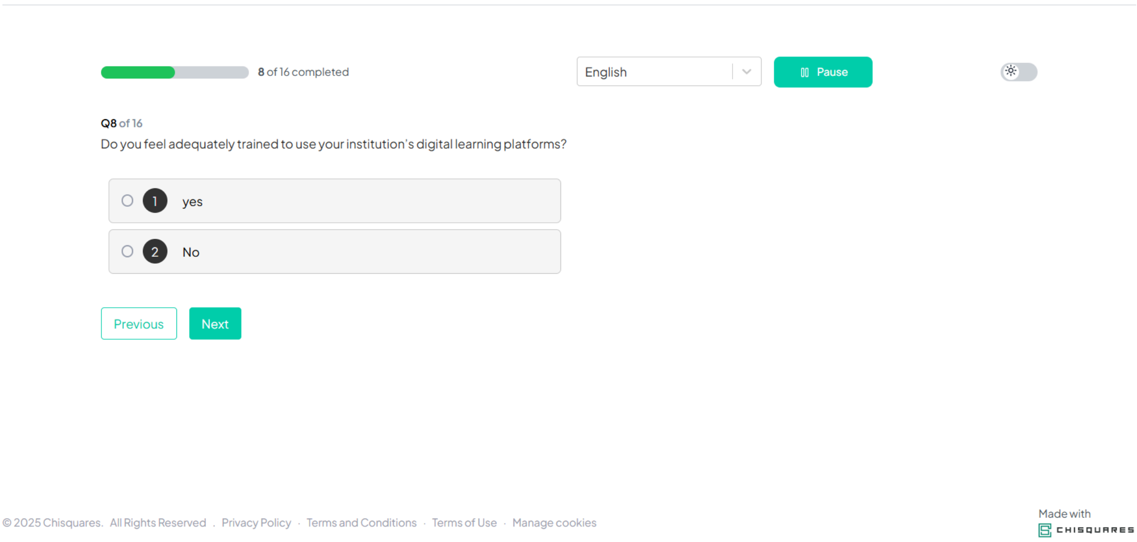


What the participant is expected to do:

Type your answer in the space provided. There is no word limit unless otherwise stated. Please be as detailed as you wish.

Yes/No Question

A binary-choice format where participants select either “Yes” or “No” in response to a closed-ended question. To confirm the presence or absence of a behavior, condition, or belief. This format is quick to answer, easy to analyze, and best for screening or filtering respondents.

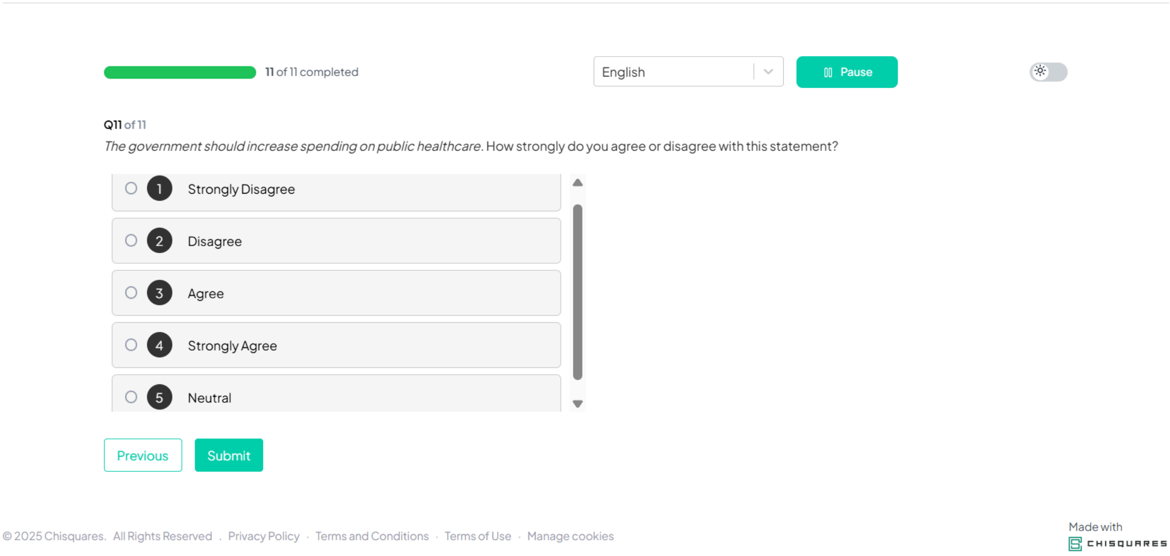


What the participant is expected to do:

Indicate whether or not you feel adequately trained to use your institution's digital learning platform by selecting "Yes" or "No."

Likert Scale Question

A scale-based question type where participants express their level of agreement, frequency, or satisfaction using ordered categories (e.g., from "Strongly Disagree" to "Strongly Agree"). To measure attitudes, opinions, or perceptions about a specific statement. It quantifies subjective feedback, allowing researchers to analyze sentiments across a population

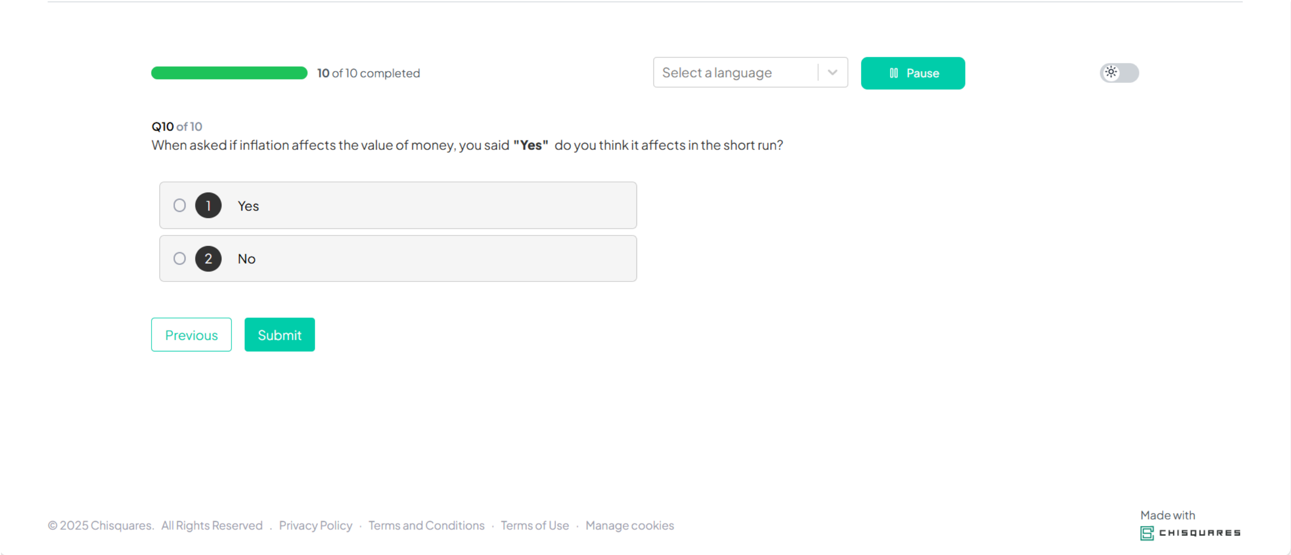


What the participant is expected to do:

Read the statement provided (e.g., government spending on healthcare) and select the option that best reflects your view from the scale.

Piping Question

Piping is a dynamic question type that customizes follow-up content based on a participant's earlier response. Improves personalization and relevance of the survey. Helps maintain engagement and provides contextual continuity.

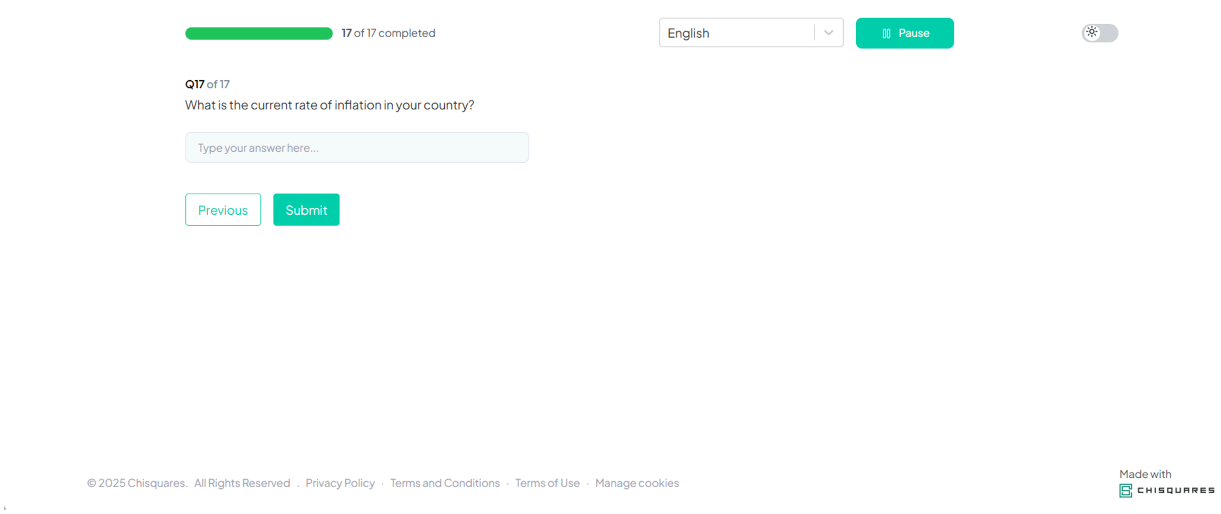


What the participant is expected to do:

Read the piped content from your previous answer and select the appropriate follow-up response.

Single Value Response Question

This is an open-ended, single-line text input field where participants are required to enter a brief response, such as a number, a name, or a short phrase. The single text entry question is typically used for collecting factual or quantifiable responses that are concise—such as numeric values, short answers, or specific terms. It provides flexibility in response while allowing researchers to capture exact, personalized input. It is particularly valuable when multiple-choice answers would be too limiting or imprecise.

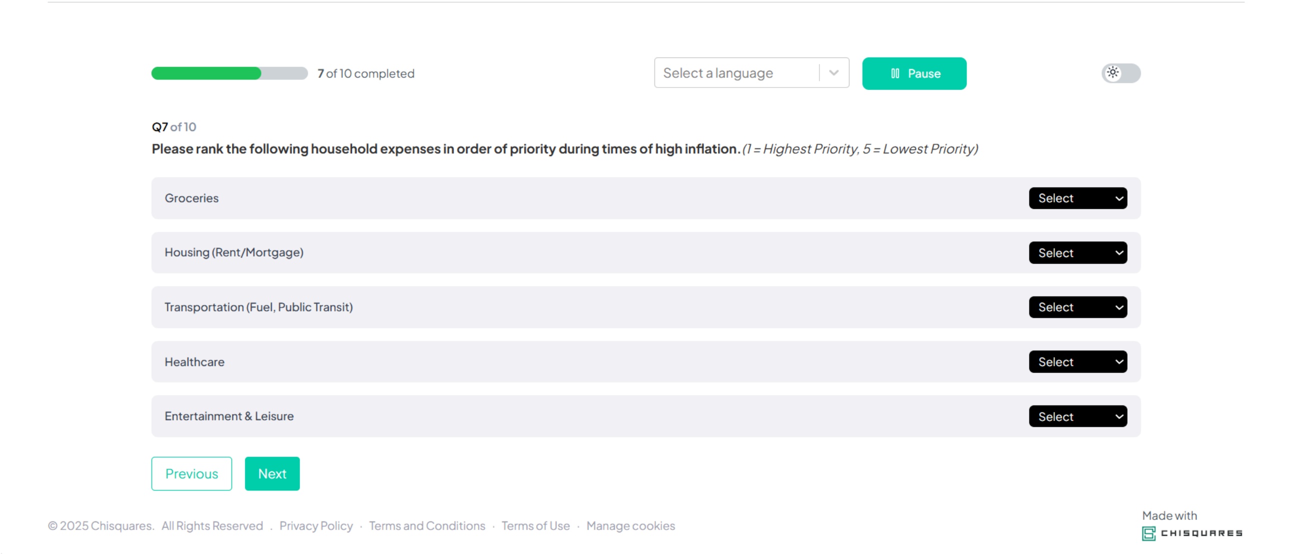


What the participant is expected to do:

Type in the current inflation rate in your country as accurately as you know. The response should be brief, typically a number (e.g., "22.5%").

Simple Ranking Ordering Question

Ranking questions ask respondents to arrange a list of items in order of preference, importance, or priority. Reveals the participant’s value judgments, helping researchers understand what matters most to different respondent groups.

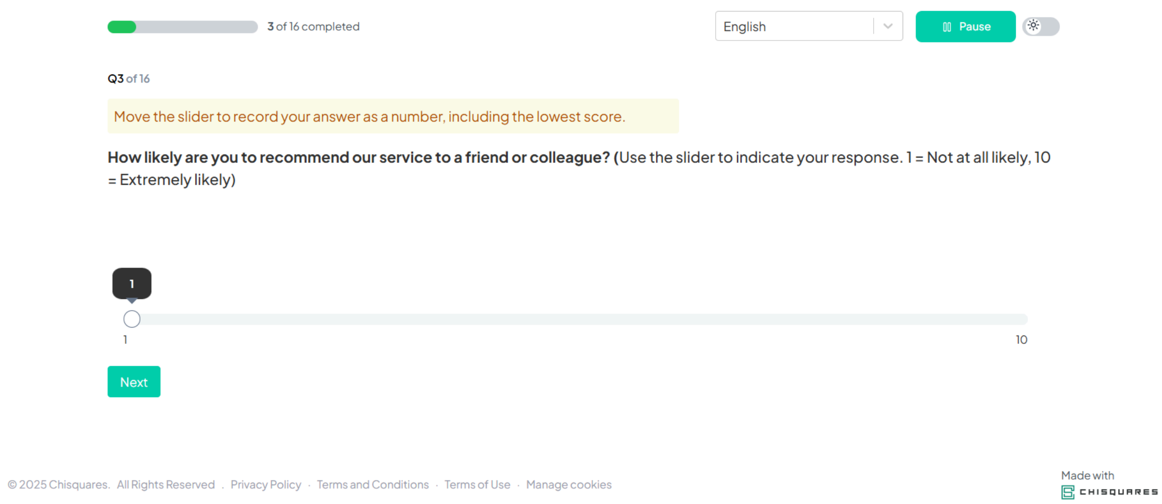


What the participant is expected to do:

Assign a rank (1 = highest priority, 5 = lowest) to each item listed. Use the dropdown or drag-and-drop feature depending on the interface.

Sliding scale Question

Slider questions allow participants to select a value along a continuous range (e.g., 1–10) by moving a slider handle. Captures nuanced opinions with more precision than multiple-choice scales. It’s visually engaging and intuitive on both desktop and mobile.

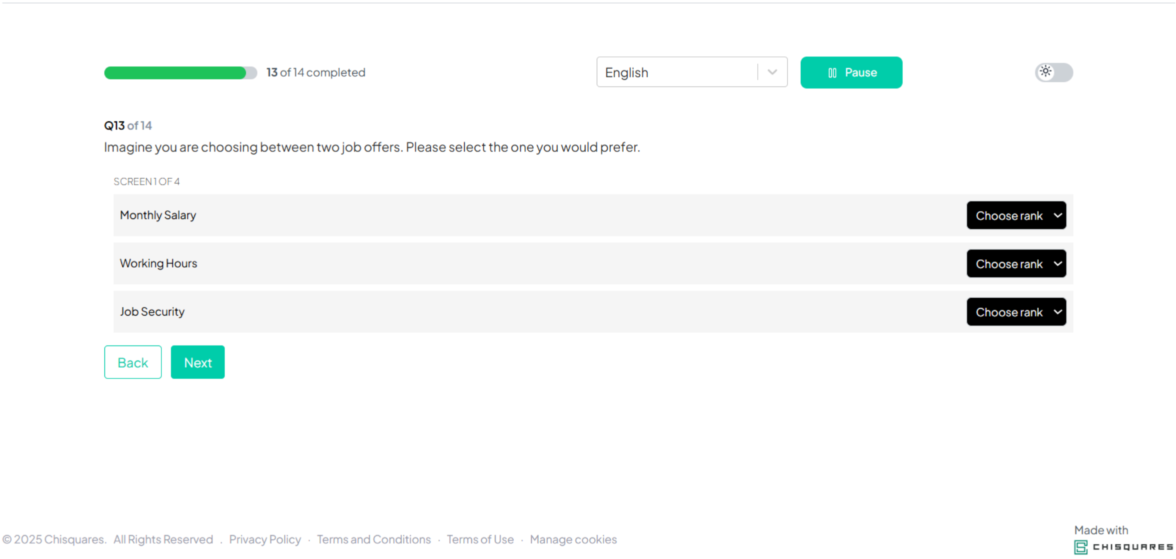


What the participant is expected to do:

Drag the slider to choose a number that best represents your opinion (e.g., level of inflation impact). The number will appear above the slider handle.

Discrete Choice Experiment Question

A standard multiple-choice question (MCQ) format in which participants are allowed to select only one option is used to capture a definitive answer from a set of mutually exclusive choices. This format simplifies analysis and is ideal for classification-based data collection, such as preferences, categories, or demographics.

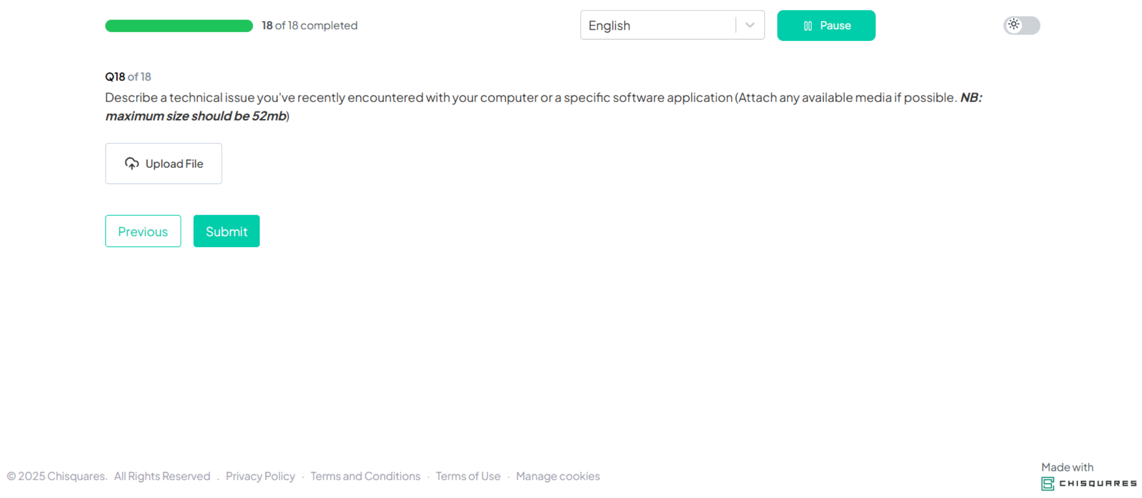


What the participant is expected to do:

Choose the one item you would prioritize (e.g., Monthly Salary, Job Security) by selecting its corresponding rank.

Multimedia Response Question

This question type enables participants to submit a file—such as a document, image, or audio recording—as part of their response. It is typically paired with a prompt requesting explanation or context. This format is useful for gathering media-based evidence or additional materials that text responses alone cannot convey. Common applications include the submission of screenshots, reports, voice recordings, or scanned documents. It enables the collection of rich, contextual data and is particularly useful in technical assessments, customer feedback, or visual documentation.

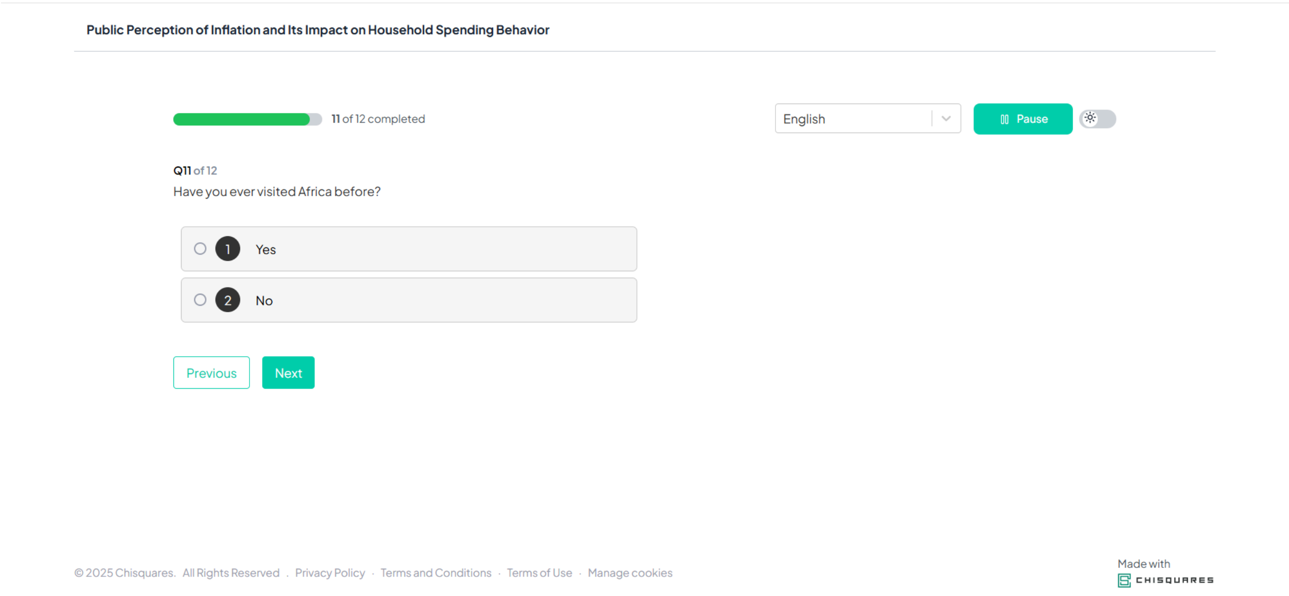


What the participant is expected to do:

Describe a technical issue you recently experienced with your device or software, and upload a supporting file if available (maximum size: 52MB). This may include screenshots, logs, or recordings.

Multiple Variant (A/B) Test Question

This question type includes multiple variants that are presented to participants based on their responses to a preceding trigger or logic question.

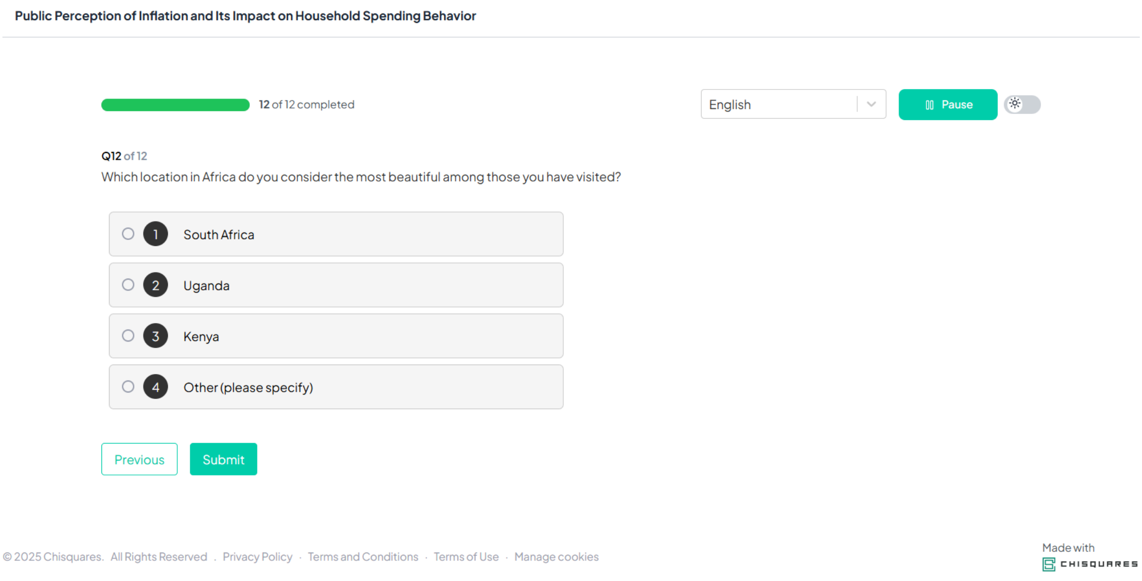


The question shown in the diagram—"Have you ever visited Africa before?"—serves as the decision point for branching the survey into one of two paths:

- **Branch A: For Participants Who Answer "Yes"**

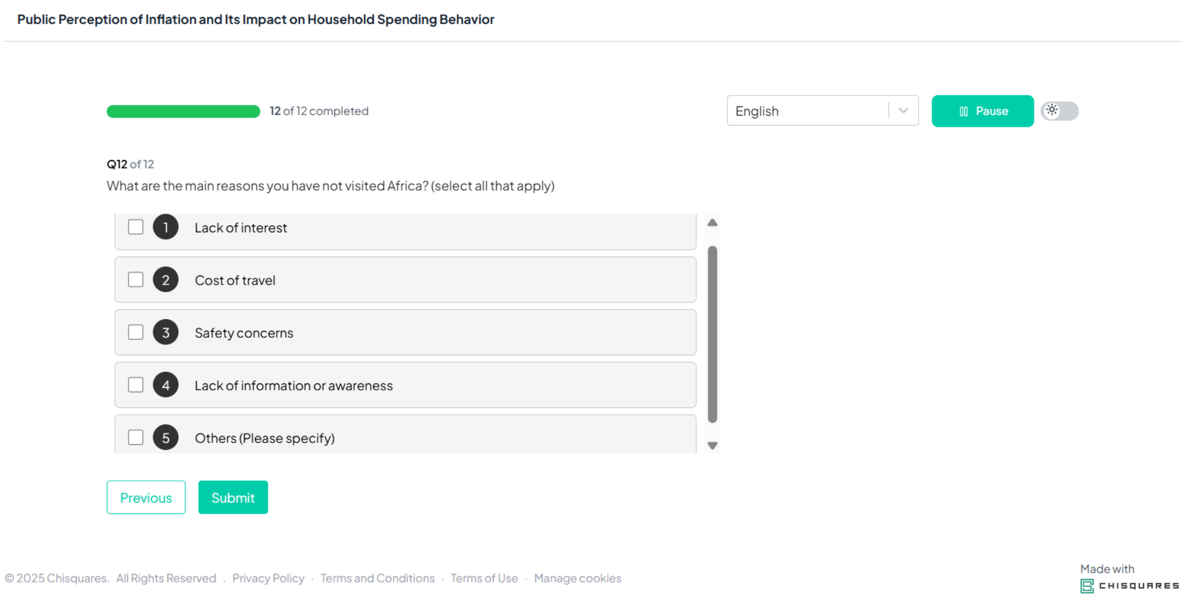
  Participants who respond "Yes" to the trigger question are presented with the follow-up question:

"Which location in Africa do you consider the most beautiful among those you have visited?"



- **Branch B: For Participants Who Answer "No"**

Participants who respond "No" are directed to a different follow-up question: "What are the main reasons you have not visited Africa? (Select all that apply)"



This branching logic ensures that participants receive contextually appropriate questions based on their previous responses, enhancing the relevance and quality of the data collected.

Getting Started / Data Collection / Survey Design / Participant Portal / Consent prompt

The consent form serves as a critical first step in the survey process, ensuring that participants are fully informed about the study before choosing to take part. It outlines the purpose of the research, explains how the data will be used, and assures participants of their rights, including voluntary participation and confidentiality.

By presenting this information clearly and transparently, the consent form helps build trust and supports ethical standards in research.

Design and Outlook

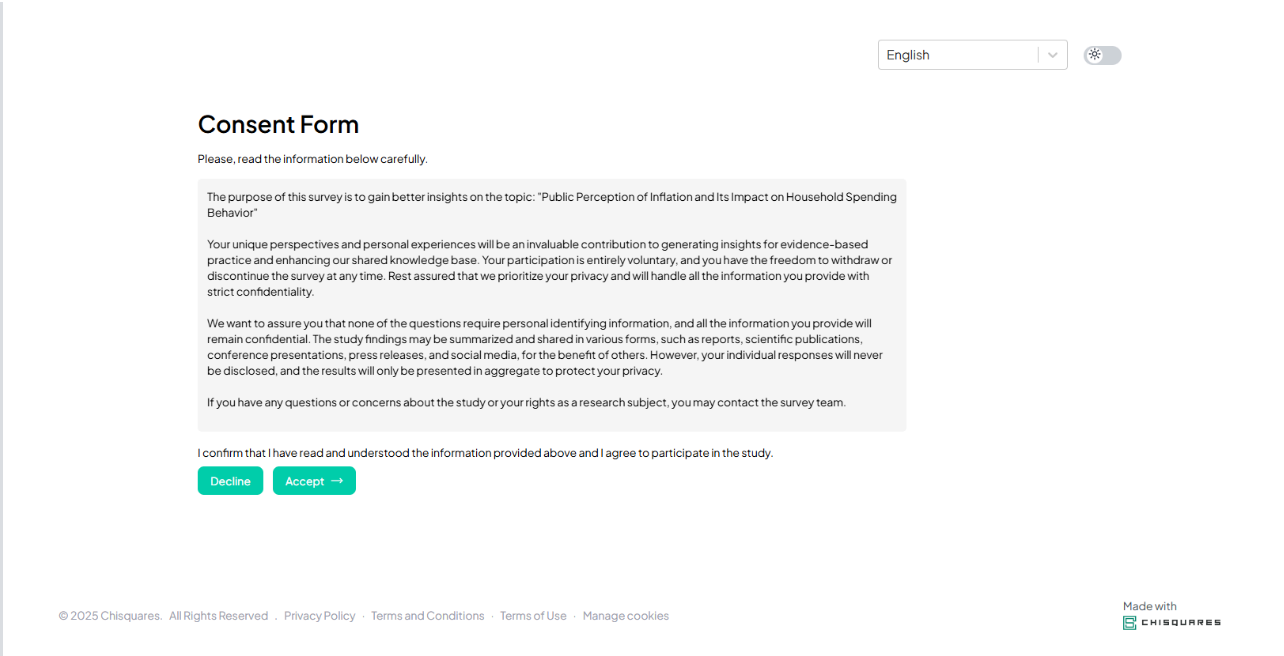
The interface adopts a clean, contemporary design that directs attention to the core content. A prominent header titled **"Consent Form"** is followed by well-structured information displayed within a content box, which improves readability.

The `Decline` and `Accept` buttons are prominently placed at the bottom, following Chisquares' user-friendly design principles to facilitate easy and intuitive interaction. Directly above these buttons is a confirmation statement, allowing participant agreement to be logged clearly.

To enhance inclusivity and user experience, the prompt includes a **language selector** and a **light/dark mode toggle**, making the form more accessible to diverse participant groups.

The footer contains essential legal and privacy links, such as the **Terms of Use** and **Privacy Policy**, in alignment with Chisquares' commitment to compliance and transparency.

Finally, the **"Made with Chisquares"** branding element reinforces platform identity and builds user trust.

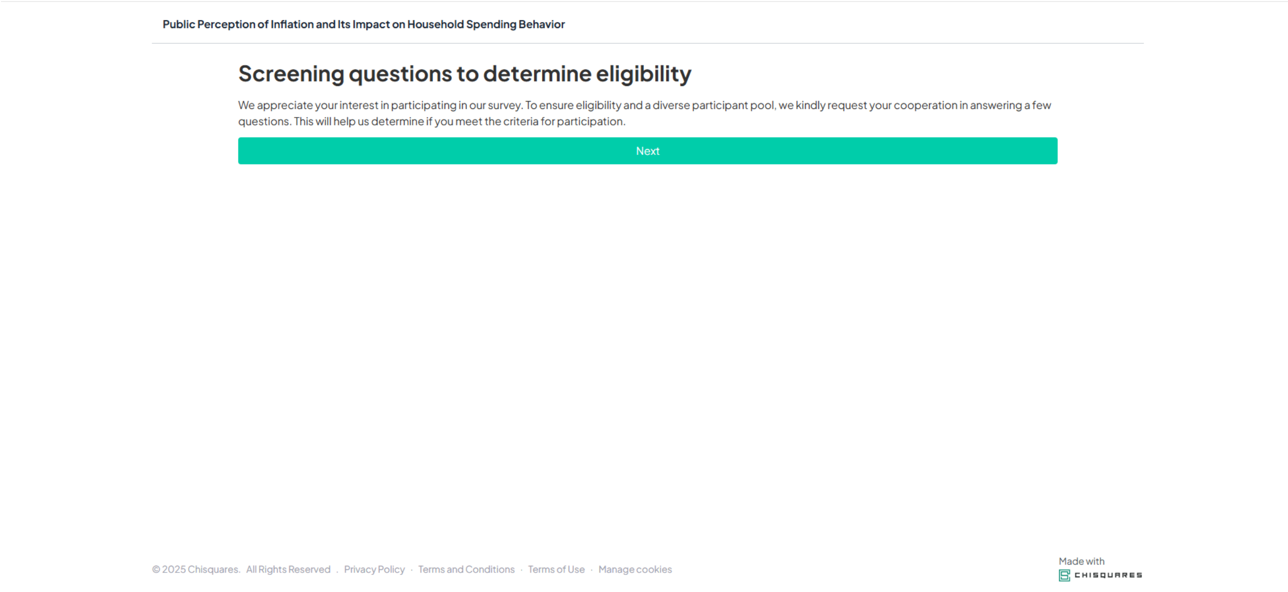


Getting Started / Data Collection / Survey Design / Participant Portal / Eligibility prompt

This screen introduces the eligibility check process, which is designed to ensure that only participants who meet the study's predefined inclusion criteria proceed with the survey. It features a concise headline— “Screening questions to determine eligibility”—followed by an explanatory message that thanks participants for their interest and requests their cooperation in answering a short set of preliminary questions.

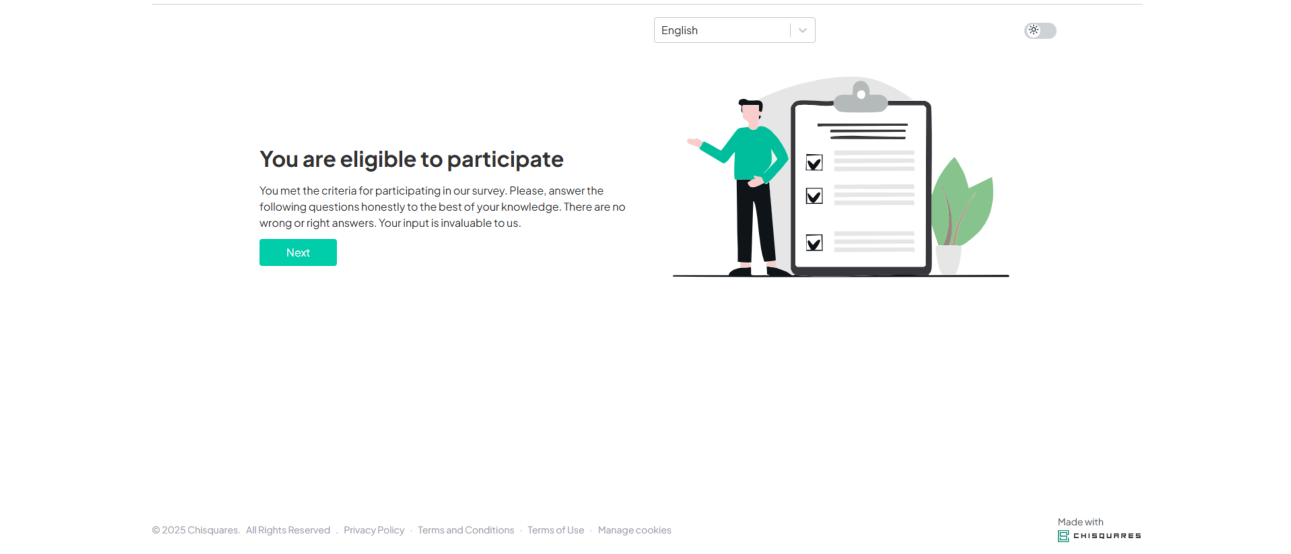
The purpose of this stage is to promote a diverse and qualified participant pool by filtering responses based on key criteria. A centrally placed "Next" button initiates the screening process.

This prompt plays a vital role in the survey process by helping researchers preserve sample quality while clearly communicating to participants the purpose of the initial screening questions.



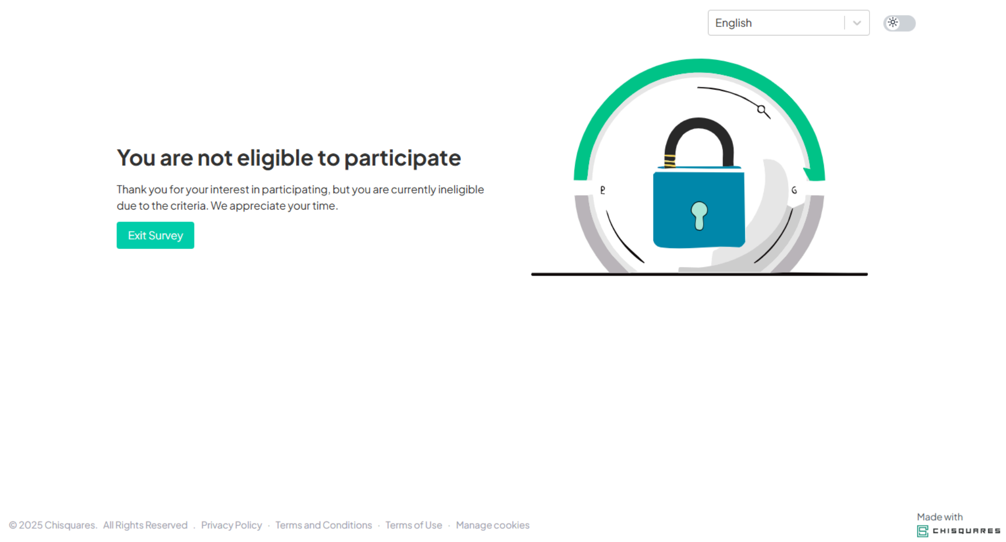
Eligible Screen

This screen is displayed to respondents who successfully meet the predefined inclusion criteria for a survey. It informs participants that they are eligible to proceed and encourages them to answer the following questions honestly. The message emphasizes that there are no right or wrong answers and highlights the value of their input. A “Next” button is provided to continue the survey. The accompanying illustration and minimalist design create a user-friendly, reassuring transition into the main questionnaire.



Ineligible Screen

This screen is presented to respondents who do not meet the eligibility criteria. The message, “You are not eligible to participate,” is followed by a courteous note thanking the participant for their interest and time. A single “Exit Survey” button allows the user to close the session gracefully. The use of a lock icon reinforces the concept of restricted access while maintaining a respectful and professional tone. This prompt ensures a smooth exit experience for ineligible participants.



Getting Started / Data Collection / Survey Design / Participant Portal / Exit prompt

This screen serves as the final step in the survey process, providing participants with a courteous conclusion to their experience.

It features a simple, clear message: **“Thank you for your response,”** followed by a brief note expressing appreciation for the participant’s time and effort.

A single `Exit` button is displayed prominently, allowing users to close the survey.

The right side of the screen includes a colorful, friendly illustration of individuals celebrating completion, reinforcing a sense of accomplishment.

At the bottom, standard footer elements include links to the platform’s **privacy policy**, **terms of use**, and **cookie management**, alongside the **“Made with Chisquares”** brand label.

This exit prompt improves the user experience by recognizing participant contributions and providing a clear, positive conclusion to the survey process.

Public Perception of Inflation and Its Impact on Household Spending Behavior

Thank you for your response.

Thank you for your participation in this survey. We genuinely appreciate your time and effort.

Exit

Getting Started / Data Collection / Survey Design / Participant Portal / Incentive prompt

The incentive prompt features a clear headline: **“We are appreciating our participants”** — followed by a brief message informing users of an incentive reward and inviting them to enter their email to claim it.

A privacy note assures respondents that their email address will only be used for sending the incentive and not for any other purpose.

Below this, an input field allows users to enter their email, accompanied by two action buttons: `Get incentive` and `Exit Survey`.

On the right side, an illustration reinforces the theme of feedback, rewards, and survey participation, maintaining visual consistency with the **Chisquares** brand.

At the bottom of the page, a standard footer includes links to **privacy policies**, **terms**, and **cookie management**, along with the platform's branding: **“Made with Chisquares.”**

This prompt supports participant engagement and enhances user satisfaction by delivering a professional, transparent, and easy-to-navigate incentive experience.

We are appreciating our participants.

Thank you for completing this survey. We have an incentive to appreciate you for your participation. Enter your mail below to claim it.

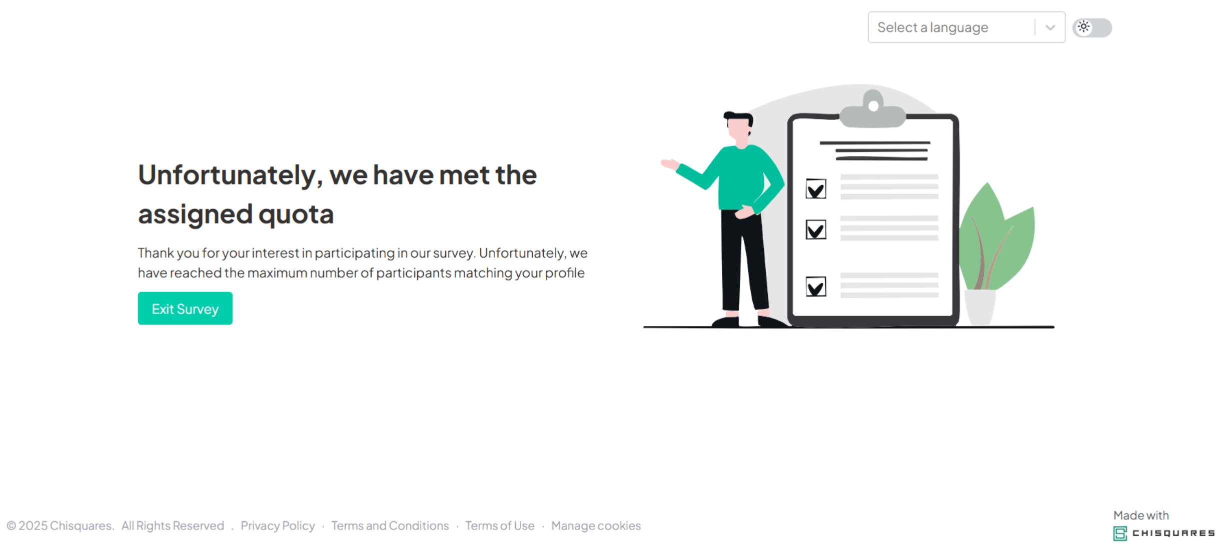
ⓘ We are requesting your mail only for the purpose of sending you the survey link, and we will not use it for any other purpose.

Enter your email

Get incentive → Exit Survey

Getting Started / Data Collection / Survey Design / Participant Portal / Quota prompt

The quota prompt on the platform is an automated message that appears when a respondent attempts to access a survey after the maximum number of participants with a similar profile has been reached. This feature serves as a control mechanism to prevent over-sampling and ensure a balanced representation of respondents. As a core component of the platform's survey control infrastructure, the Quota Message Screen plays a crucial role in ensuring that data collection is strategic, fair, and efficient. By automatically notifying respondents once their quota group is full, it supports scientifically rigorous sampling and reinforces Chisquares' commitment to user-centered and ethically sound survey practices.



Getting Started / Data Collection / Survey Design / Participant Portal / Welcome prompt

This introductory screen serves as the participant's first point of contact and is designed to create a positive and professional first impression. It features a clear survey title, a warm introductory message expressing appreciation for the participant's time, and a brief explanation of the survey's purpose—to generate meaningful, evidence-based insights.

Two primary action buttons are provided: `Start Survey` for new participants and `Continue Your Paused Response` for returning users.

Additional accessibility features include a **language selector** and a **light/dark mode toggle** at the top-right corner.

The right side of the screen displays a vibrant illustration with a large **"WELCOME"** sign, visually reinforcing a friendly and engaging atmosphere.

The footer includes essential legal links such as the **privacy policy**, **terms of use**, and **cookie management settings**.

Overall, this welcome page reflects **Chisquares'** commitment to user-centered design, ethical research practices, and a seamless participant experience.

Version 2 of the Chisquares Platform Test

English

Preview mode

Status: Prelaunched

Version 2 of the Chisquares Platform Test

We extend our heartfelt gratitude for your willingness to participate in this survey. Your input is pivotal in our mission to effect positive change and drive meaningful impact. Your dedication of time and effort is genuinely appreciated, and we look forward to receiving your responses. Your unique experiences and perspectives will undoubtedly serve as invaluable assets, contributing significantly to the insights that fuel evidence-based practice and further enrich our collective knowledge.

ⓘ You can update the content of this page in your survey settings. Click here learn more.

Start Survey   Continue your paused response

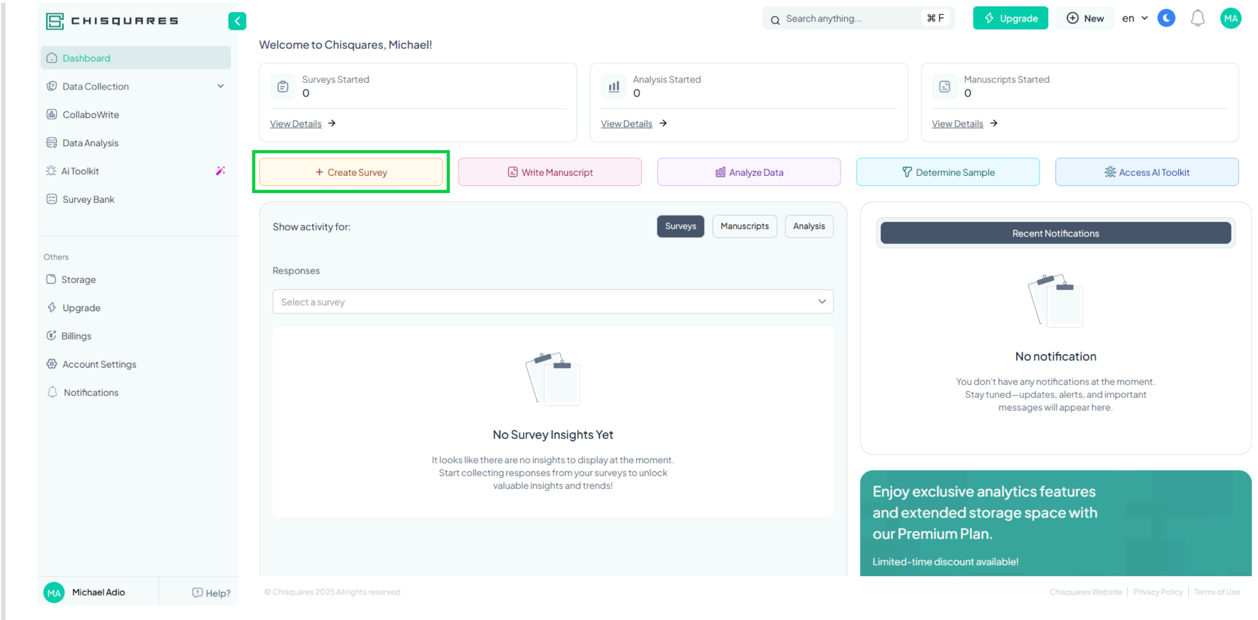
Made with CHISQUARES

Getting Started / Data Collection / Survey Design / Getting Started with Surveys on the Chisquares Platform

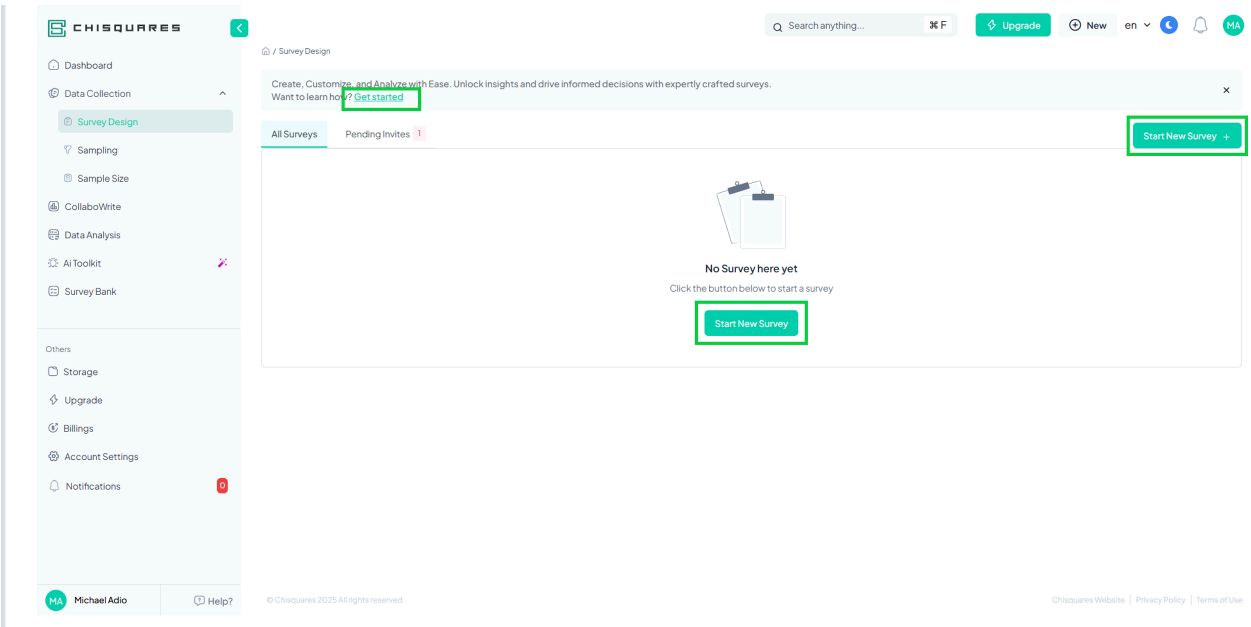
On the Chisquares platform Users can create, customize, and analyze with Ease. Unlock valuable insights and drive informed decisions using expertly crafted survey tools.

Starting a New Survey

To start a new survey as a new user, on the Chisquares platform, Click `+ Create Survey` button from the dashboard.



Alternatively, navigate to the `Survey design` submodule under the `Data Collection` module. You will see an interface as shown below.

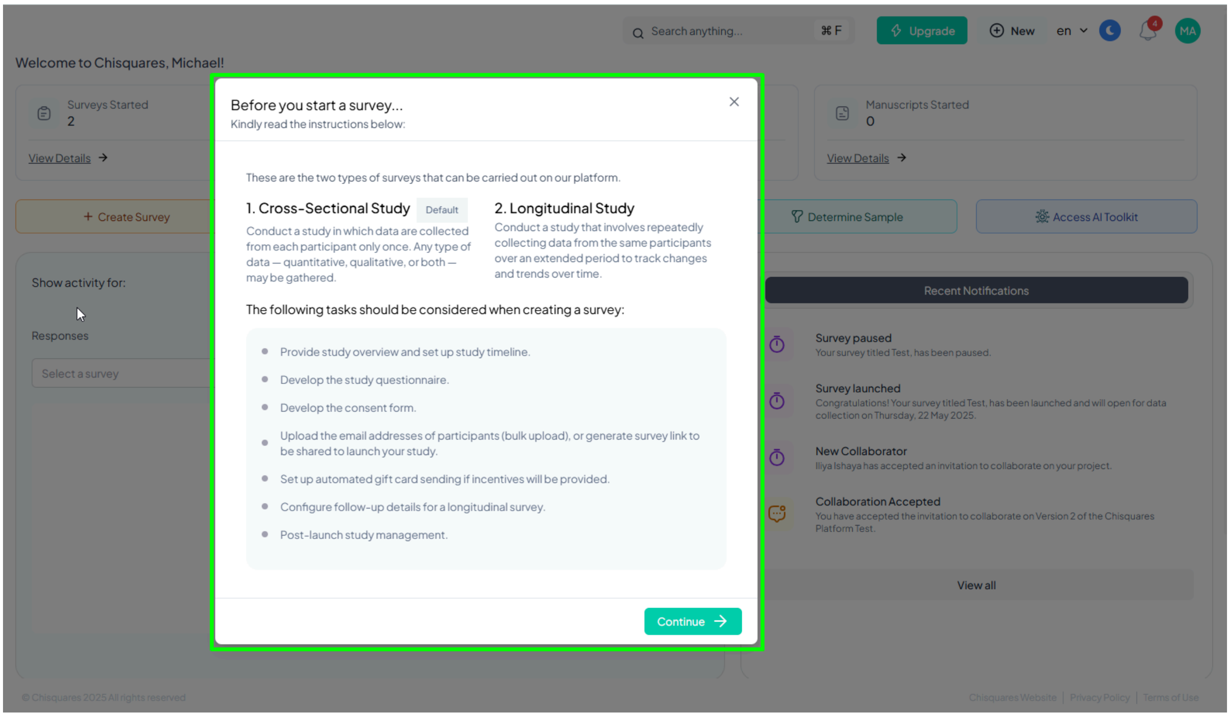


Click any of the highlighted buttons:

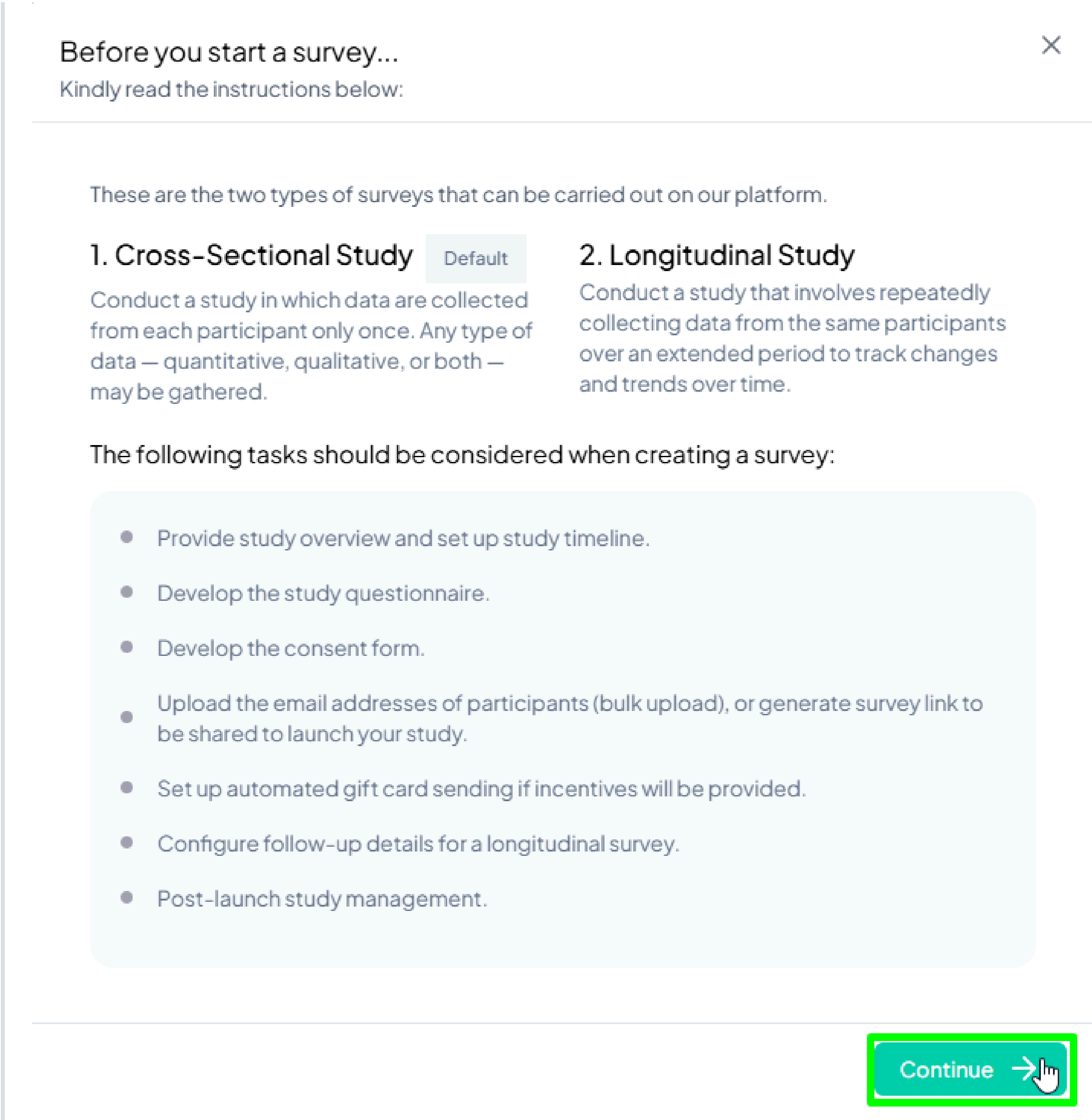
- **Get Started**
- **Start New Survey**

- **Start New Survey +**

An instructional popup will appear as shown below:



Having understood the instructions, click **Continue** to proceed with the survey.



Selecting a Survey Type

You'll be prompted to **select a survey type**: Choose from the options below to start your survey:

- **Standard Survey (ProSurvey)**
  A comprehensive survey designed for power users in research and professional contexts, featuring all advanced options.

- **QuickForm**
  A simplified version of the standard survey, tailored for casual users with less complexity compared to professional use cases.

Each survey types, when selected displays information on how the survey types can be used and the different applications to ensure users are guided to selecting the right kind of survey suitable for their used case.

Standard Survey (ProSurvey)

> A comprehensive survey designed for power users in research and professional contexts, featuring all advanced options.
> Chisquares standard survey offers a sophisticated suite of tools for data collection, analysis, and reporting. It offers a vast array of advanced tools, such as:
>
> □ Simple and Advanced Question Types
> □ Cross-sectional and Longitudinal Surveys
> ⚙ Complex Logic
> □ Financial Incentives
> □ Consent Forms (assent, parental, etc.)
> □ Detailed Reports (methodology, analysis, codebook)
> □ Survey Translation (auto/manual/file upload)
> ✏ Paper and Pencil Questionnaire Processing
> □ Survey Bank
> ...and several other advanced features
>
> It is ideal for in-depth surveys with scheduling, email delivery, and collaboration options. It also provides greater control and flexibility for

> professional use.

Simple Survey (QuickForm)

> A simplified version of the standard survey, tailored for casual users with less complex needs compared to professional use cases.
> The features of this survey include
>
> □ Basic Question Types
>
> ⚙Limited Response Collection Settings
> Survey is open by default. No need to set dates. There is a "Close survey" button
> □Analysis Report (no methodology report or codebook)
>
> □Import Questions from Survey Bank
> ⚙Limited Response Collection Settings
> Survey is open by default. No need to set dates. There is a "Close survey" button
> ✏Paper and Pencil Questionnaire Processing
> □Analysis Report (no methodology report or codebook)
> □Survey Translation (webform only)
>
> You can also switch from this survey type to a standard survey if needed.

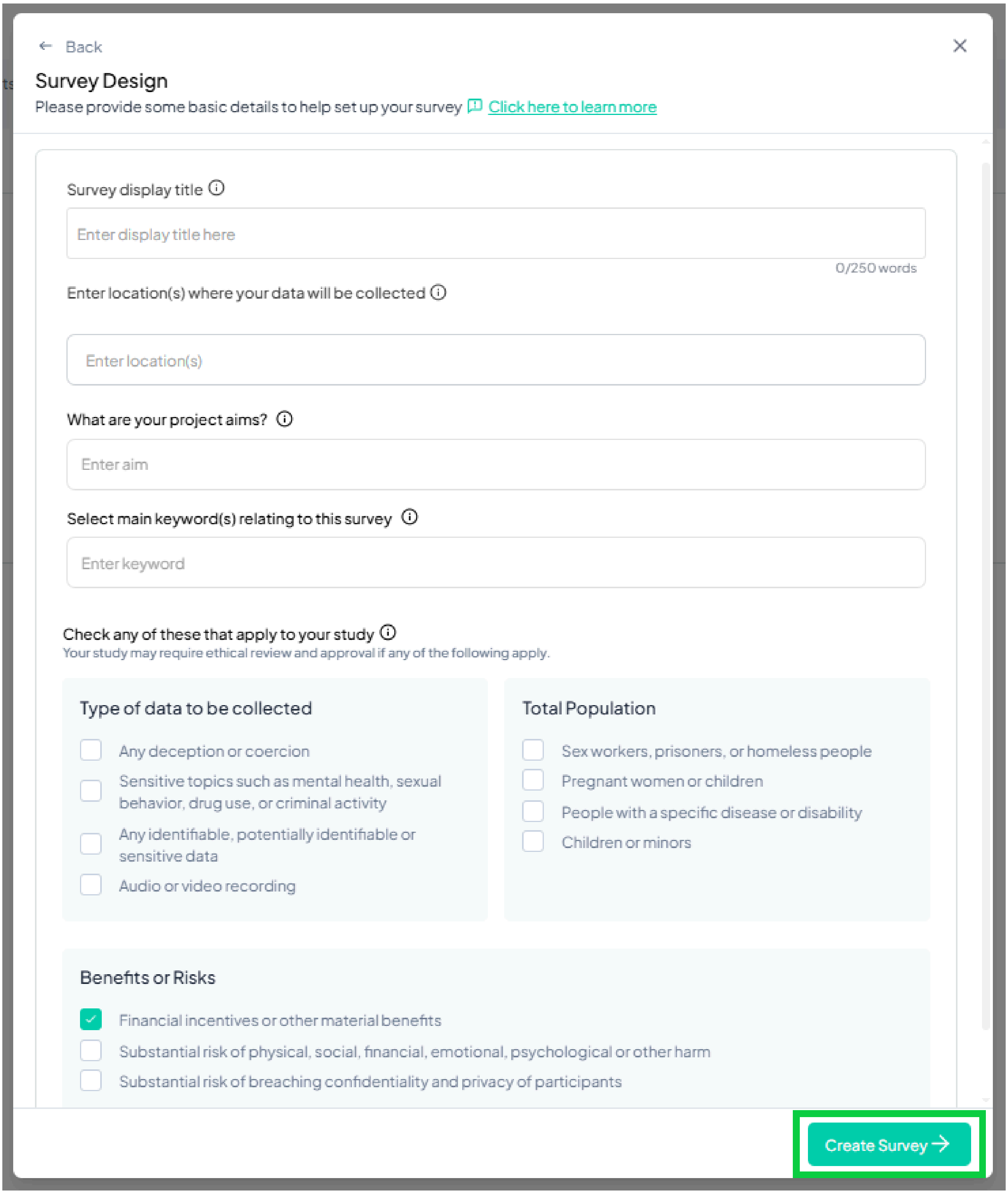
Starting the Survey

Having selected your choice of the survey, click **"Start Survey"**.

Filling Out Survey Details

Depending on the survey type, different forms will appear:

For Standard Survey

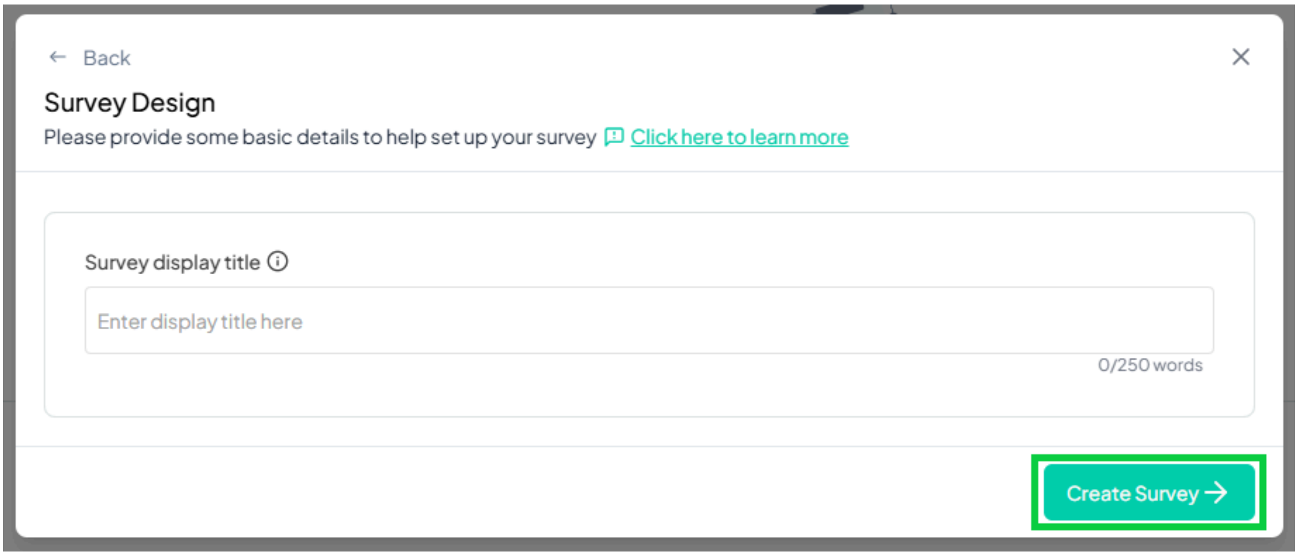


Required Fields:

- Survey Display Title
- Data Collection Locations
- Project Aims
- Main Keywords
- Ethical considerations checklist:
  - Type of data
  - Sensitive topics
  - Use of incentives
  - Vulnerable populations
  - Data privacy risks

Click **Create Survey** to proceed.

For QuickForm Survey

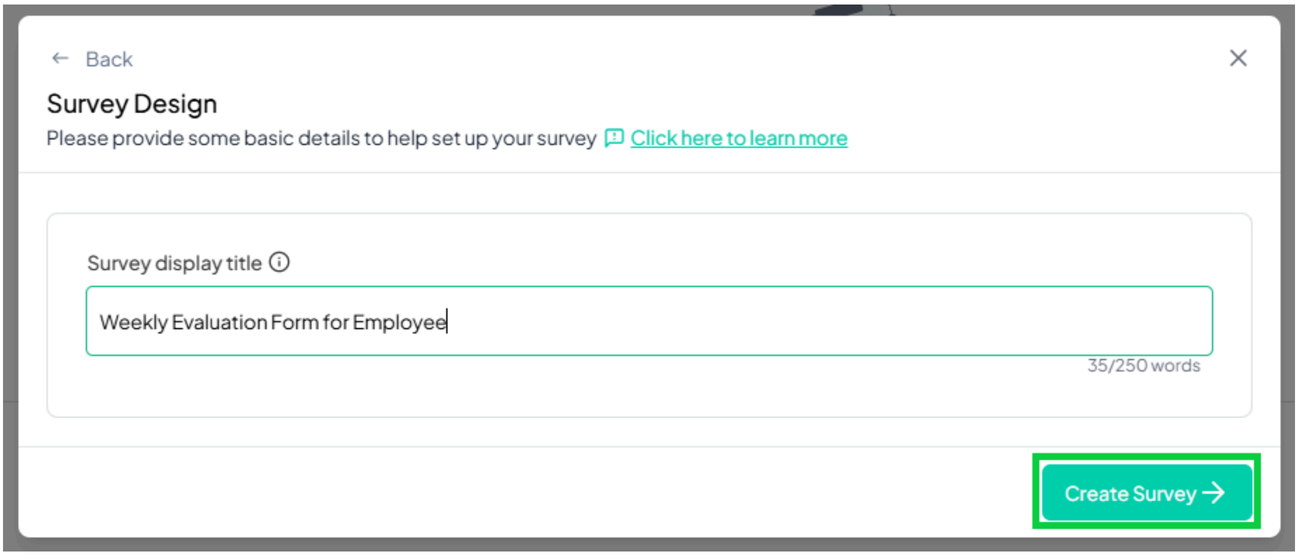


Only the **Survey Display Title** is required.

Click **Create Survey** to continue.

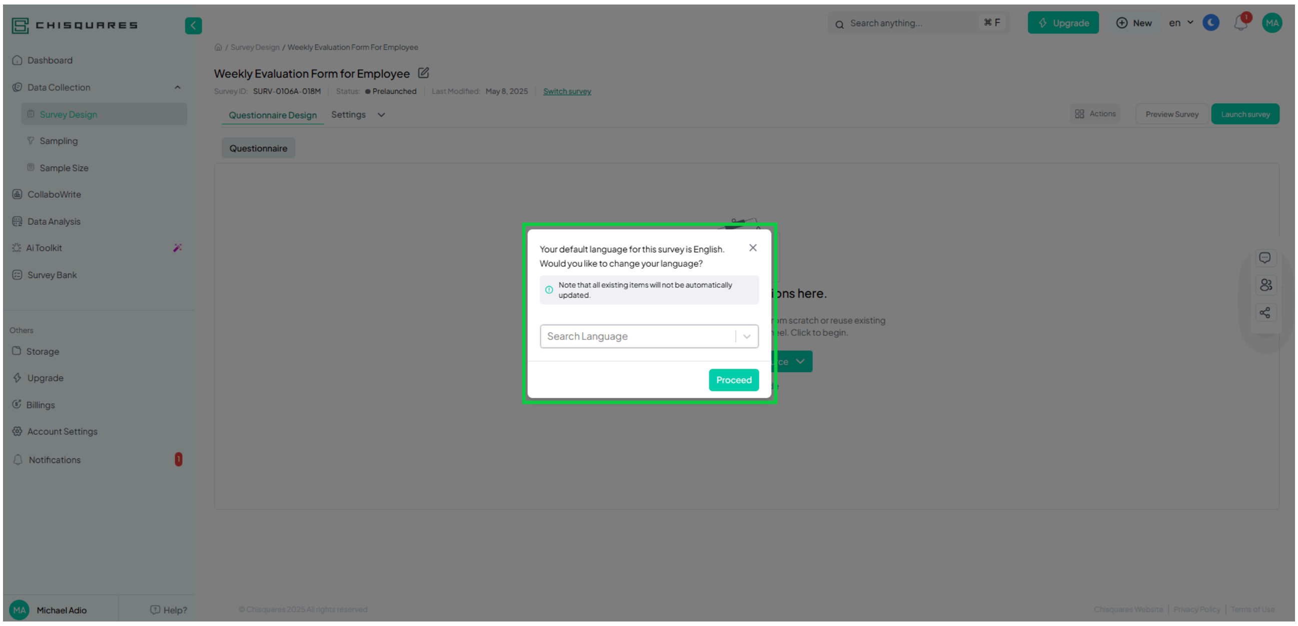
Example: Creating a QuickForm

1. Click **"Start New Survey"**
2. Select **"QuickForm"**
3. Enter survey title:
   Example: "Weekly Evaluation Form for Employee"
4. Click **"Create Survey"**



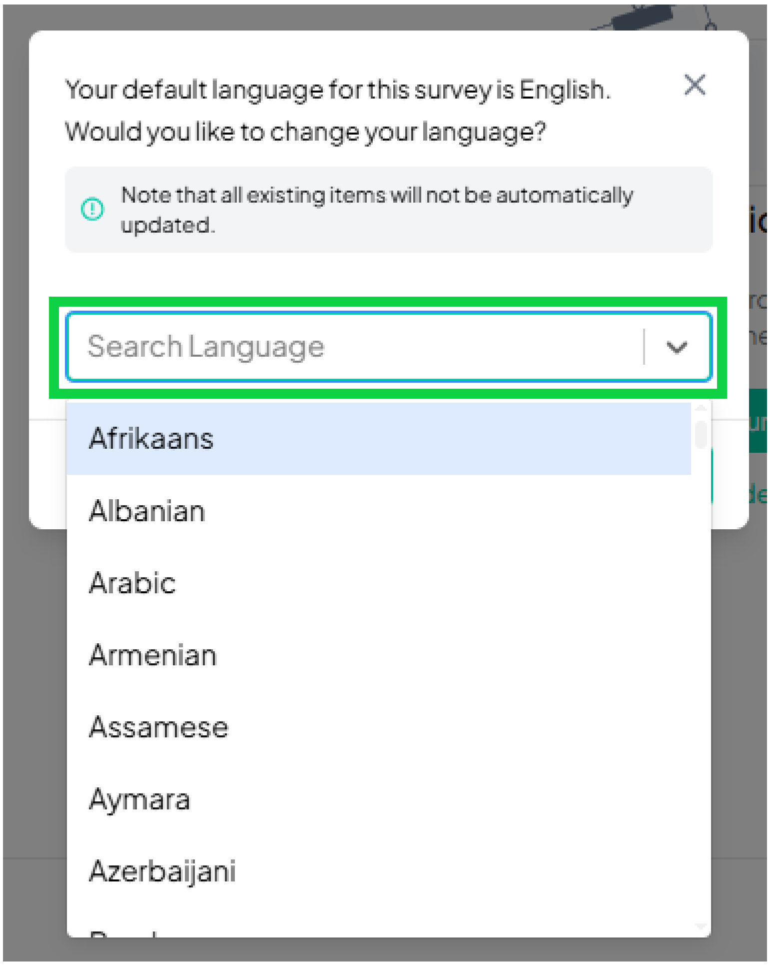
A pop-up appears:

> “Your default language for this survey is English
> Would you like to change your language?"



Select your preferred language from the dropdown list of languages or search for your preferred language.

If you choose to close the pop-up page, Your default language for the survey will be set as English.



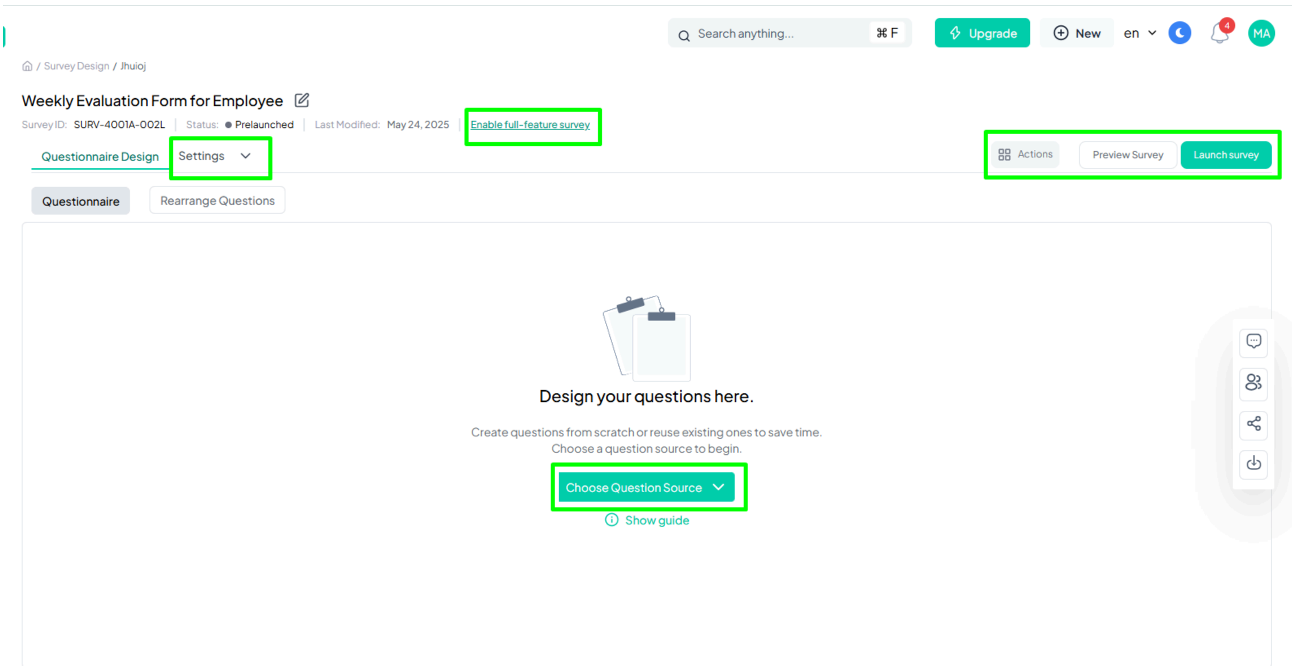
Survey Management Interface

Once you are done setting up your preferred survey language, you can now proceed to:

- **Add Questions** using the "Choose Question Source" button
- **Change survey settings** using the "Settings" drop-down button
- **Perform actions** using the "Actions" button:
  - View Responses
  - Analysis Report
  - Download

- Delete Survey
- Share Survey

- **Preview survey** using the `Preview Survey` button
- **Launch the survey** using the `Launch Survey` button
- **Switch survey** using the `Enable full-feature survey` button to transform into standard survey types.

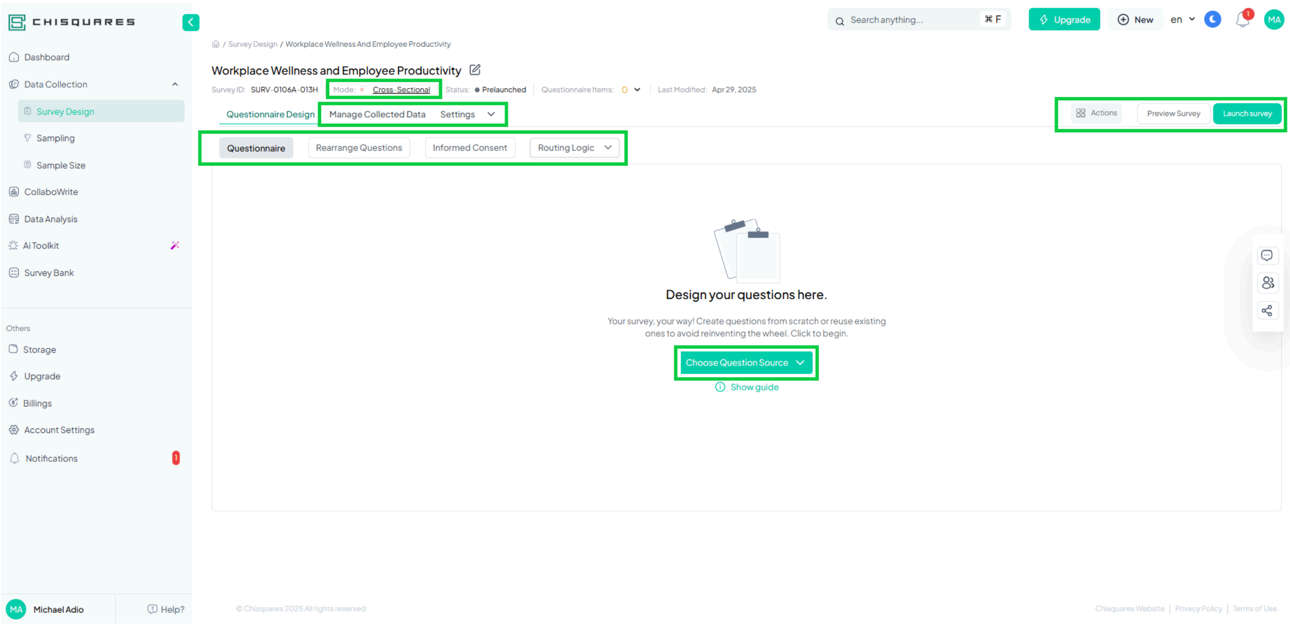


Additional Features for Standard Surveys

These survey types include:

- **Rearrange Questions** – Customize question order
- **Informed Consent** – Add Assent/Consent Form and consent logic
- **Routing Logic** – Add skip patterns, inclusion/exclusion criteria, quotas
- **Manage Collected Data** – View and manage data

- **Analyze Result** – Analyze collected data
- **Switch Survey Mode** – Switch between Cross-sectional and Longitudinal modes



You're Ready!

With your survey created, begin collecting insightful data and making evidence-based decisions. Happy surveying on Chisquares!

Getting Started / Data Collection / Sampling

Sampling is crucial in research, balancing precision with practicality. Understanding sampling principles ensures meaningful and applicable findings. The Chisquares platform enhances study reliability and validity, offering features like Automatic Representative Sampling and Probability Sampling on a Sampling Frame. Here's a detailed guide on how to perform sampling.

Automatically Draw Representative Sample

The ability to automatically draw representative samples allows you to leverage the power of advanced algorithms to efficiently and impartially select samples that accurately mirror the characteristics of the larger population. This approach contributes to the scientific rigor of research studies and addresses threats to external validity that may arise from non-coverage bias.

Getting Started

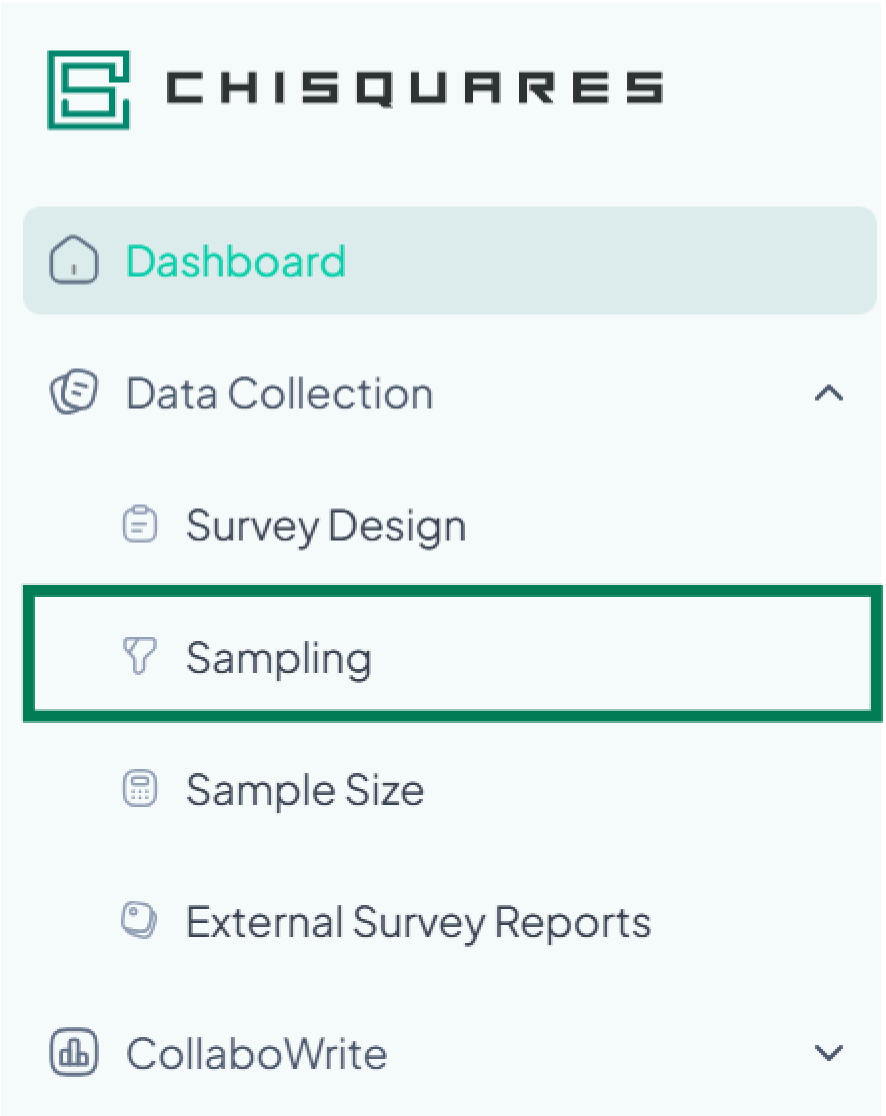
To use the Sampling module effectively, follow these simple steps:

How to use Automatically Draw Representative Sample

1. Log in to your Chisquares account.

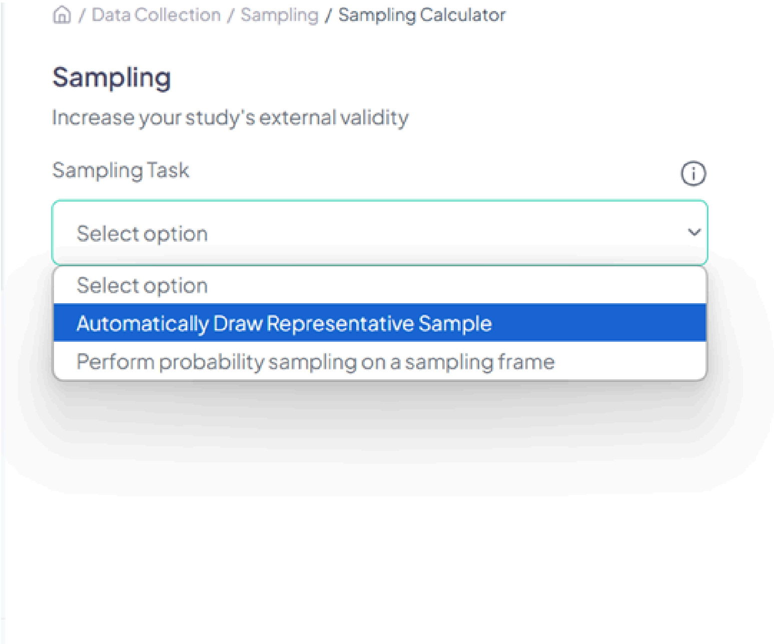
2. From the dashboard, click on **Data Collection** in the navigation bar.

3. From the dropdown, click on **Sampling**.

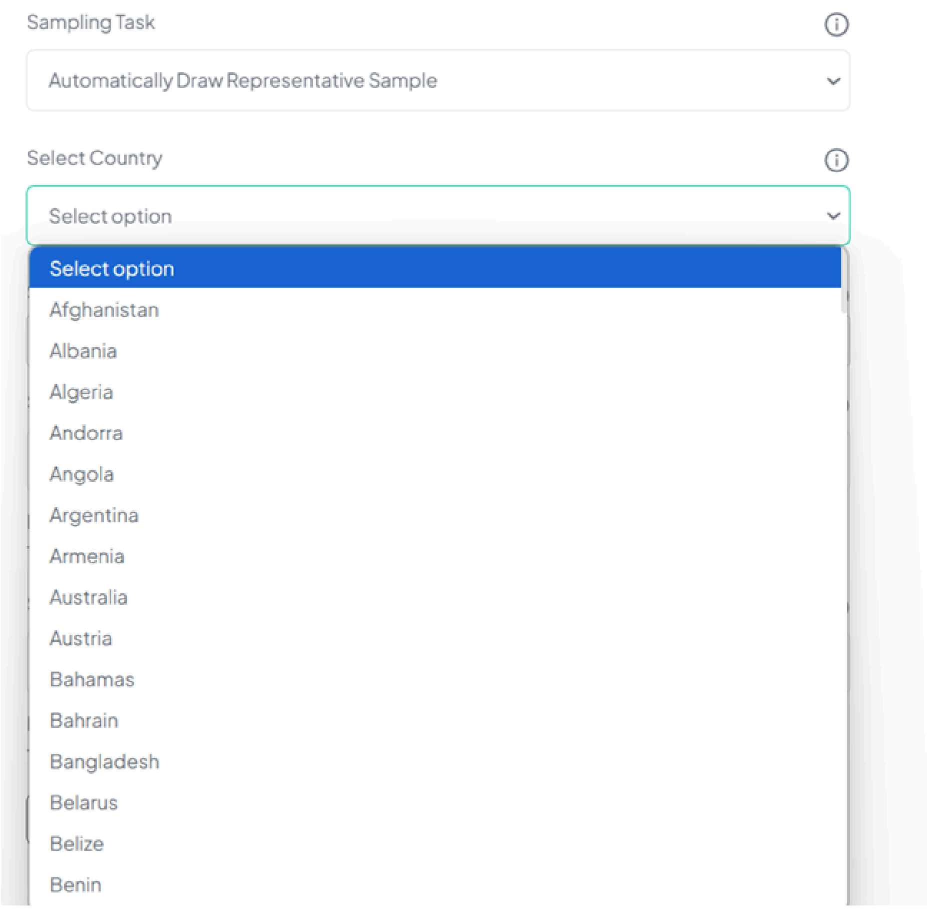


4. Click on **Start New Sampling**.

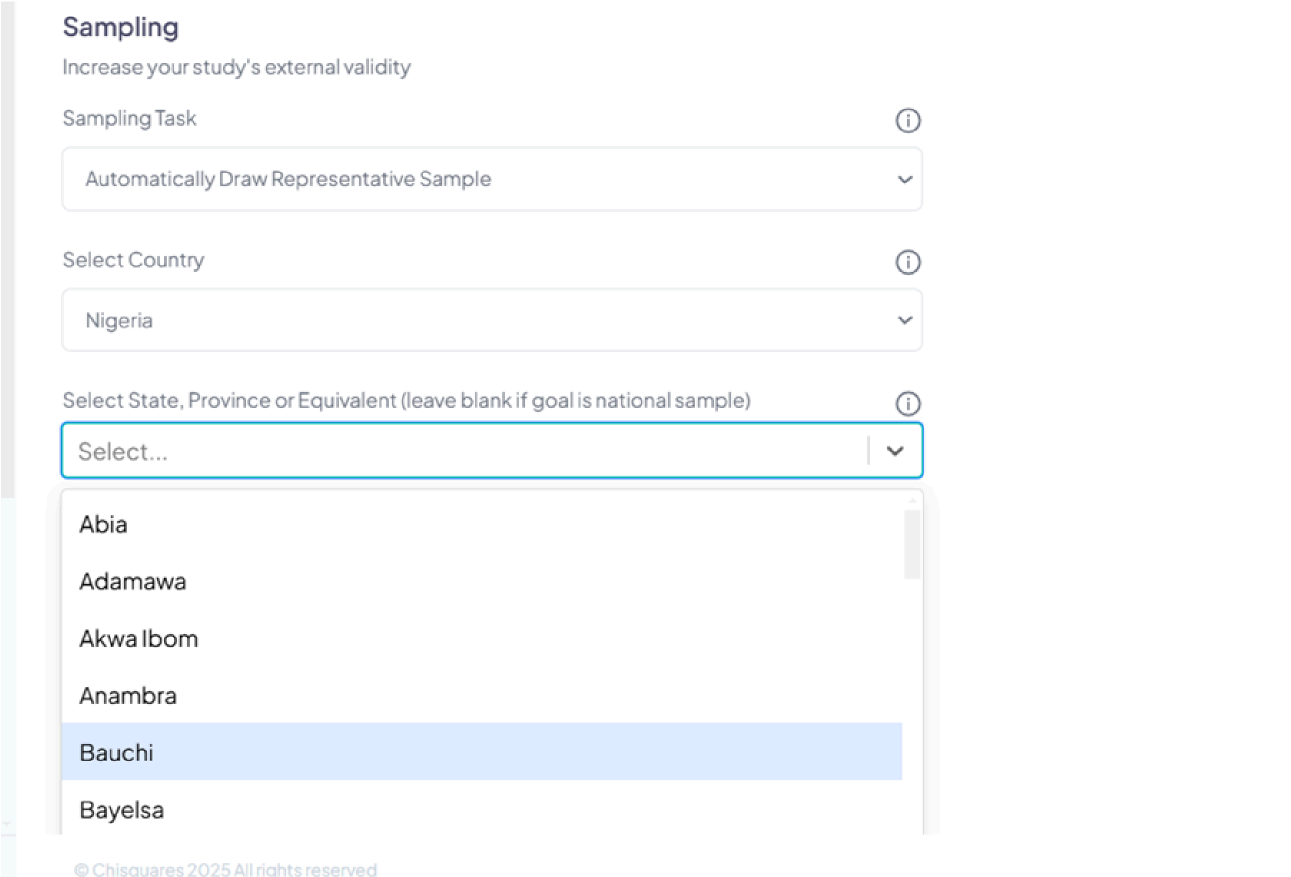
5. Select **Automatically Draw Representative Sample** as the sampling task.



6. Select the Country, State, or Province that you want to sample from.

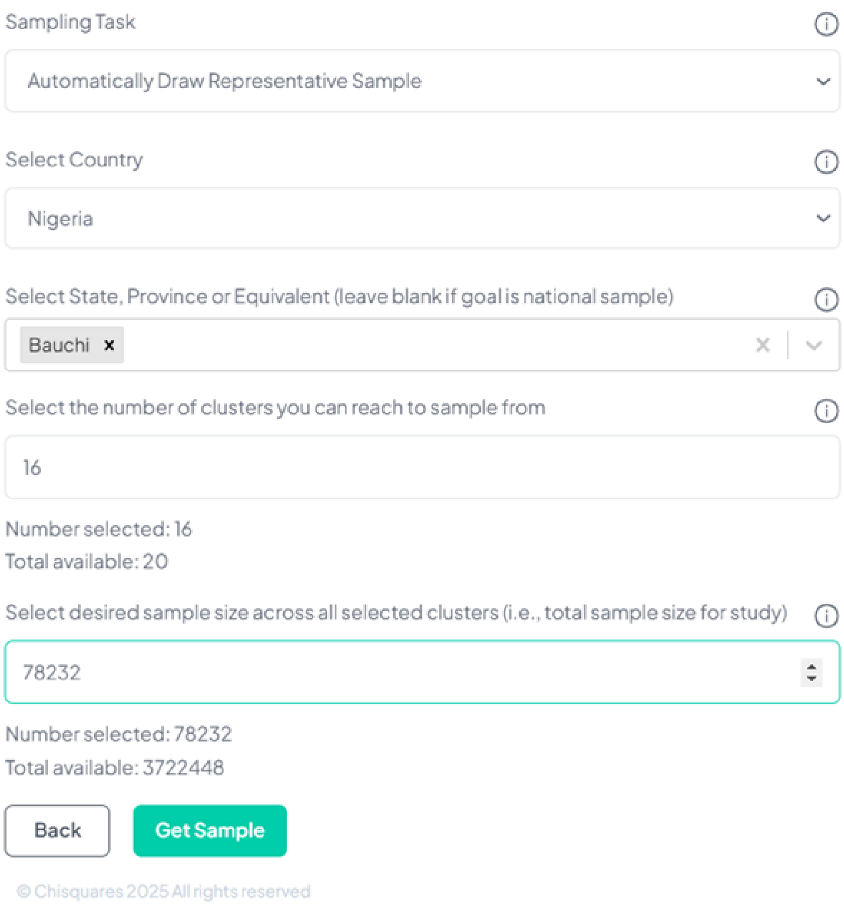


7. Choose the number of administrative divisions.



8. Input the number of clusters desired.

9. Input your desired sample size across the selected clusters.



10. Click on **Get Sample** to get the result either as a map or a table.

> **Result as table**

Sampling Result

Table Map Edit

Interpretation

The program employs a two-stage sampling process to create a self-weighting sample, ensuring an equal final (joint) selection probability for all participants. The first stage of the two-stage selection involves choosing clusters with a probability of selection proportional to their size, meaning that larger clusters are more likely to be selected. In the second stage, a fixed number of participants is chosen from each selected cluster. Since the number of individuals remains constant irrespective of population size, this second stage prioritizes smaller clusters, granting individuals from these clusters a higher probability of selection. The contrasting probabilities between the first and second stages counterbalance each other, ensuring the sample's self-weighting nature. For a detailed explanation of this sampling approach, including why large clusters have the same number of people selected in the second stage, refer to this World Health Organization (WHO) white paper. Link

Selected Sample (Nigeria) Clusters Selected: 16 Participants Selected: 78232

County	State	Number Sampled	Population	Cluster Probability	Individual Probability	Joint Probability
Bauchi	Bauchi	4890	493730	1	<0.0001	<0.0001
Bogoro	Bauchi	4890	83809	<0.0001	<0.0001	<0.0001
Damban	Bauchi	4890	150212	<0.0001	<0.0001	<0.0001
Darazo	Bauchi	4890	249946	<0.0001	<0.0001	<0.0001
Dass	Bauchi	4890	90114	<0.0001	<0.0001	<0.0001
Gamawa	Bauchi	4890	284411	<0.0001	<0.0001	<0.0001

Result as map

Sampling Result

Table Map Edit

Interpretation

The program employs a two-stage sampling process to create a self-weighting sample, ensuring an equal final (joint) selection probability for all participants. The first stage of the two-stage selection involves choosing clusters with a probability of selection proportional to their size, meaning that larger clusters are more likely to be selected. In the second stage, a fixed number of participants is chosen from each selected cluster. Since the number of individuals remains constant irrespective of population size, this second stage prioritizes smaller clusters, granting individuals from these clusters a higher probability of selection. The contrasting probabilities between the first and second stages counterbalance each other, ensuring the sample's self-weighting nature. For a detailed explanation of this sampling approach, including why large clusters have the same number of people selected in the second stage, refer to this World Health Organization (WHO) white paper. Link

Selected Sample (Nigeria) Clusters Selected: 16 Participants Selected: 78232

Probability Sampling on a Sample Frame

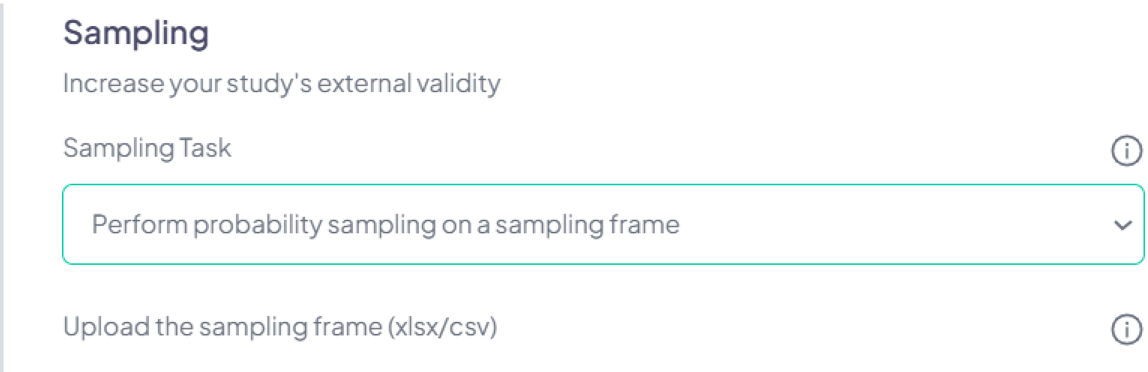
1. Log in to your Chisquares account.

2. From the dashboard, click on **Data Collection** in the navigation bar.

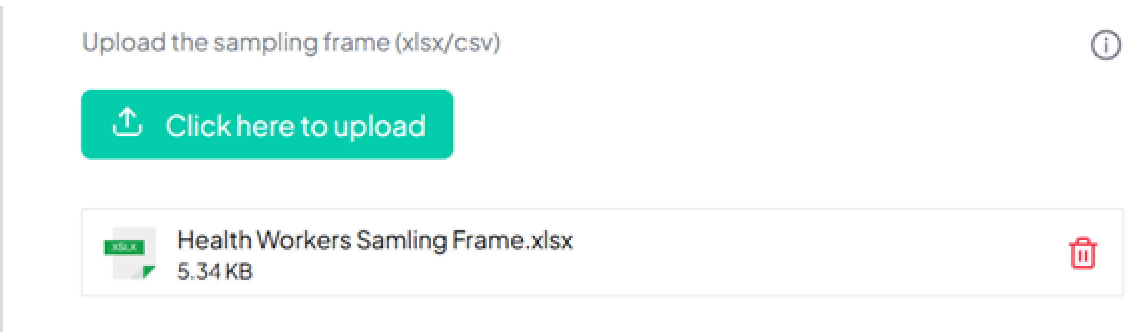
3. From the dropdown, click on **Sampling**.

4. Click on **Start New Sampling**.

5. Select **Perform Probability Sampling on a Sampling Frame**.

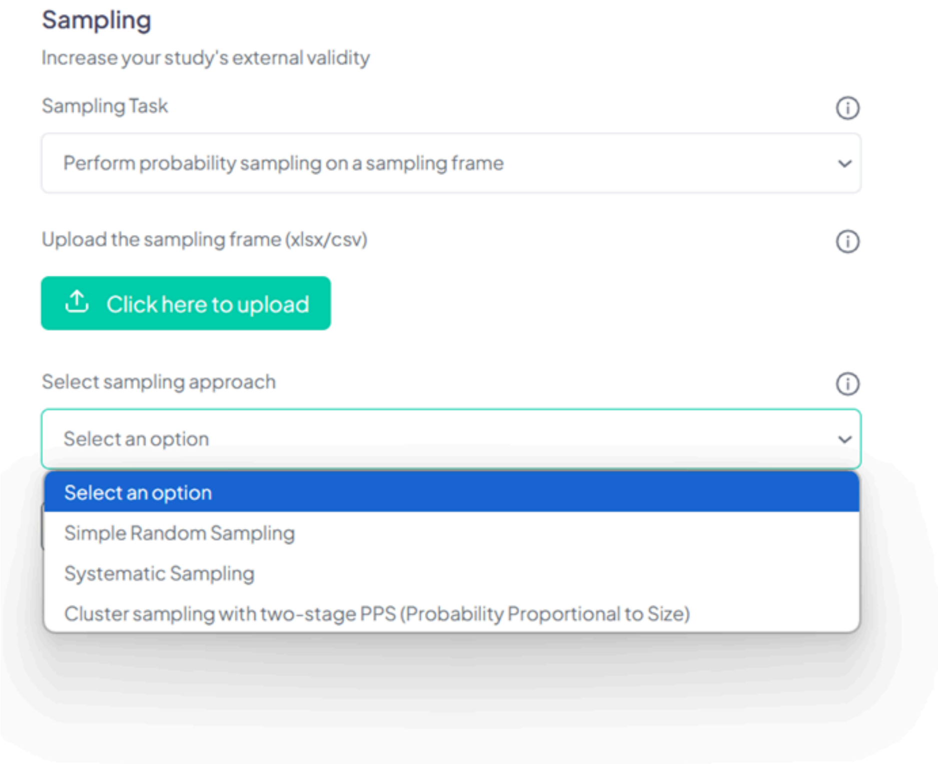


6. Upload the sampling frame.

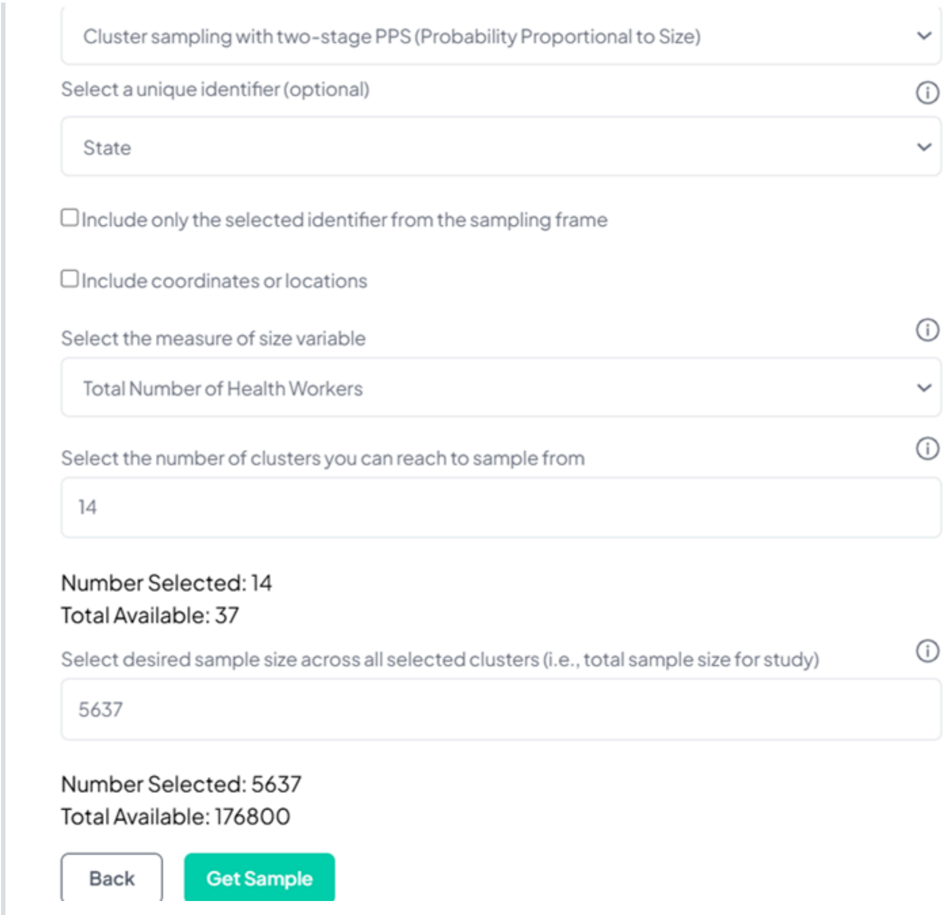


For simple random sampling, the IDs or names of the items to be sampled should be in a single column in your Excel spreadsheet. For systematic sampling, the IDs or names of the items to be sampled should be in a single column in your Excel spreadsheet. There should also be another column with the sorting variable with which to arrange the sampling elements before selection. For PPS sampling *(i.e., sampling with the probability of selection proportional to size),* the IDs or names of the clusters to be sampled should be in a single column in your Excel spreadsheet. There should also be another column with the measure of size for each cluster.

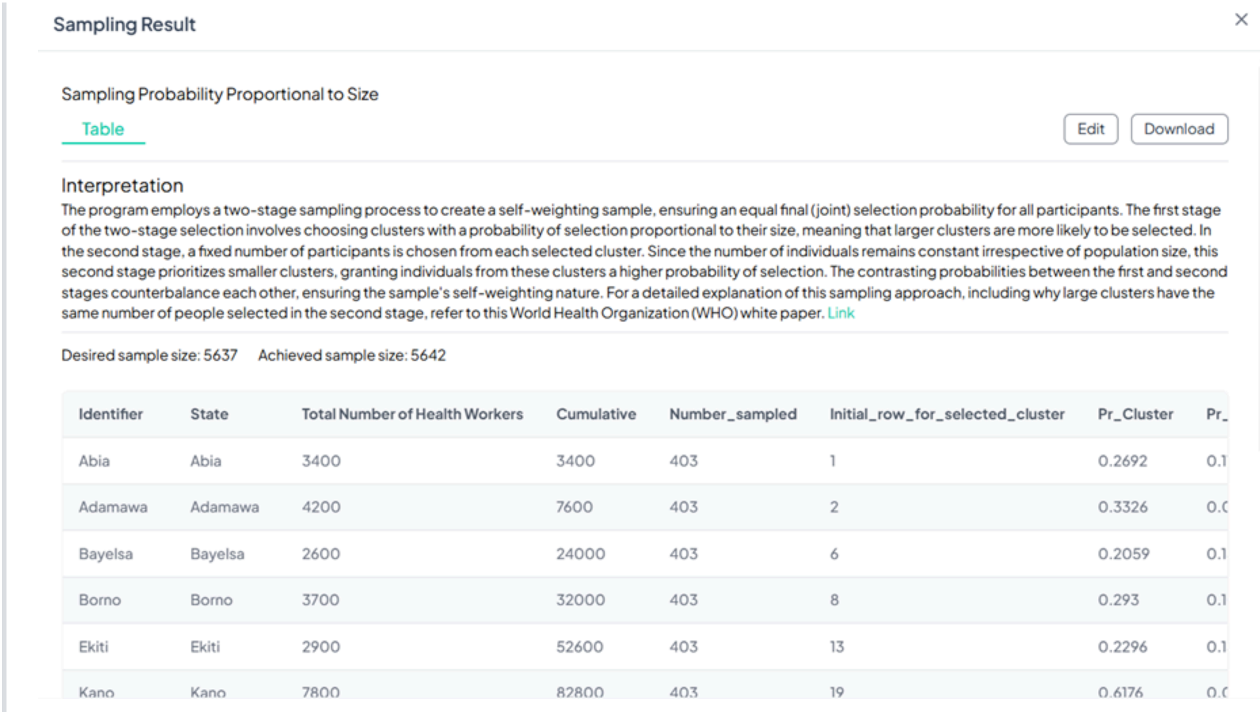
7. Select the sampling approach *(i.e. Simple Random Sampling, Systematic Sampling, or PPS sampling)*.



8. Enter other input parameters for the desired sampling approach, as applicable.



9. Then click on the **Get sample** button to get the result to get the results in a tabular form.



Sampling Result

Sampling Probability Proportional to Size

Table

Edit Download

Interpretation

The program employs a two-stage sampling process to create a self-weighting sample, ensuring an equal final (joint) selection probability for all participants. The first stage of the two-stage selection involves choosing clusters with a probability of selection proportional to their size, meaning that larger clusters are more likely to be selected. In the second stage, a fixed number of participants is chosen from each selected cluster. Since the number of individuals remains constant irrespective of population size, this second stage prioritizes smaller clusters, granting individuals from these clusters a higher probability of selection. The contrasting probabilities between the first and second stages counterbalance each other, ensuring the sample's self-weighting nature. For a detailed explanation of this sampling approach, including why large clusters have the same number of people selected in the second stage, refer to this World Health Organization (WHO) white paper. Link

Desired sample size: 5637 Achieved sample size: 5642

Identifier	State	Total Number of Health Workers	Cumulative	Number_sampled	Initial_row_for_selected_cluster	Pr_Cluster	Pr_
Abia	Abia	3400	3400	403	1	0.2692	0.1
Adamawa	Adamawa	4200	7600	403	2	0.3326	0.0
Bayelsa	Bayelsa	2600	24000	403	6	0.2059	0.1
Borno	Borno	3700	32000	403	8	0.293	0.1
Ekiti	Ekiti	2900	52600	403	13	0.2296	0.1
Kano	Kano	7800	82800	403	19	0.6176	0.0

Click on **Download** to download the result on your device as a spreadsheet.

Additional Feature

- **Information Tooltip (i):** Hover over the info icon next to the **Sampling Task** label for quick explanations of each option.

Best Practices

- **Ensure Data Completeness:** Before using probability sampling, confirm that the sampling frame is well-structured and complete.
- **Choose the Right Sampling Method:** Select **representative sampling** for general population studies and **probability sampling** for statistically rigorous research.
- **Validate Your Sample:** Always review your sample distribution to ensure it aligns with study goals.

Conclusion

The **Sampling** module on the Chisquares platform provides robust tools for researchers to enhance study reliability. By leveraging **automated representative sampling** and **probability-based selection**, users can streamline the sampling process while maintaining methodological rigor.

For further assistance, access the **Help?** button in the lower-left for extended support.

Getting Started / Data Collection / Sample Size

Sample size, a pivotal consideration in research, directly influences the reliability of study outcomes. Determining the optimal sample size balances statistical power with practical constraints. The Chisquares Platform allows you to perform a series of sample size calculation types i.e. Cross-sectional study, Comparative Study with 2 arms, Comparative study with 3+ arms, Cluster Randomized trial, Equivalency trials, and Longitudinal study with staggered entry. Here's a detailed guide on how to calculate sample size.

Getting Started

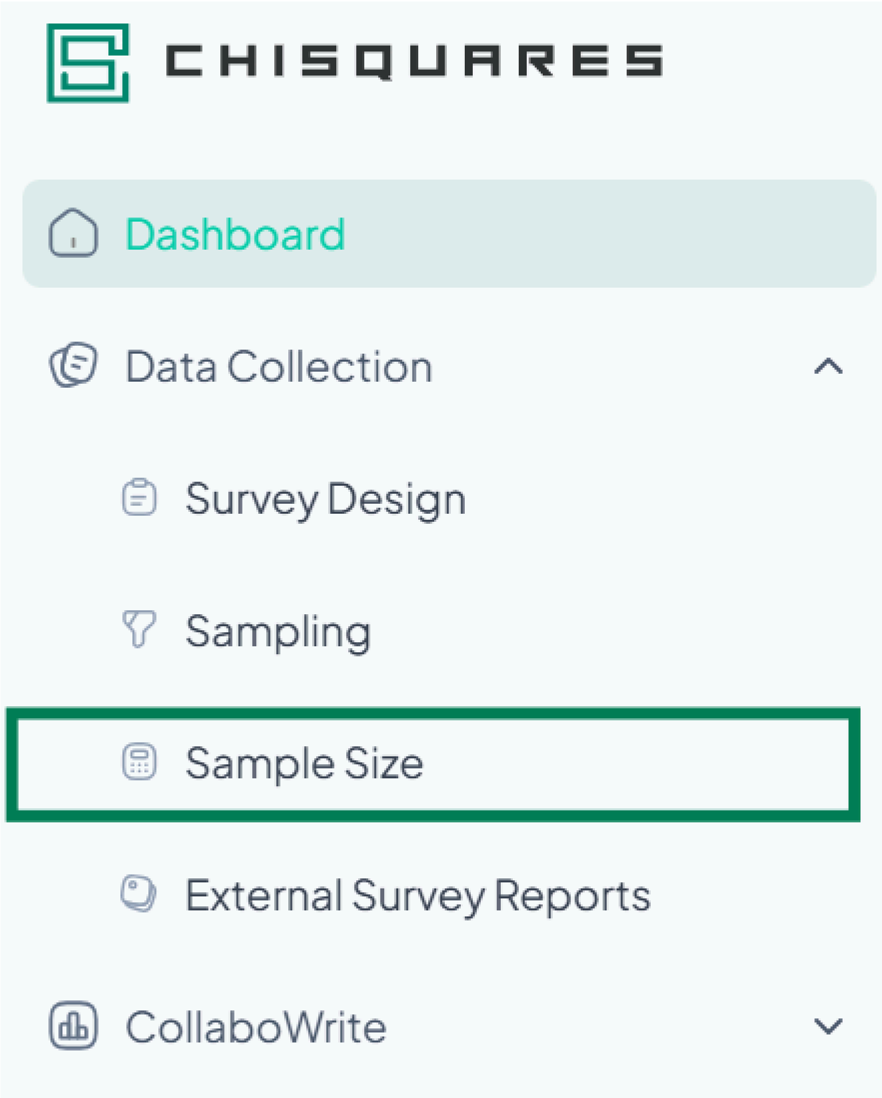
To use the Sample size module effectively, follow these simple steps:

How to Calculate Sample Size

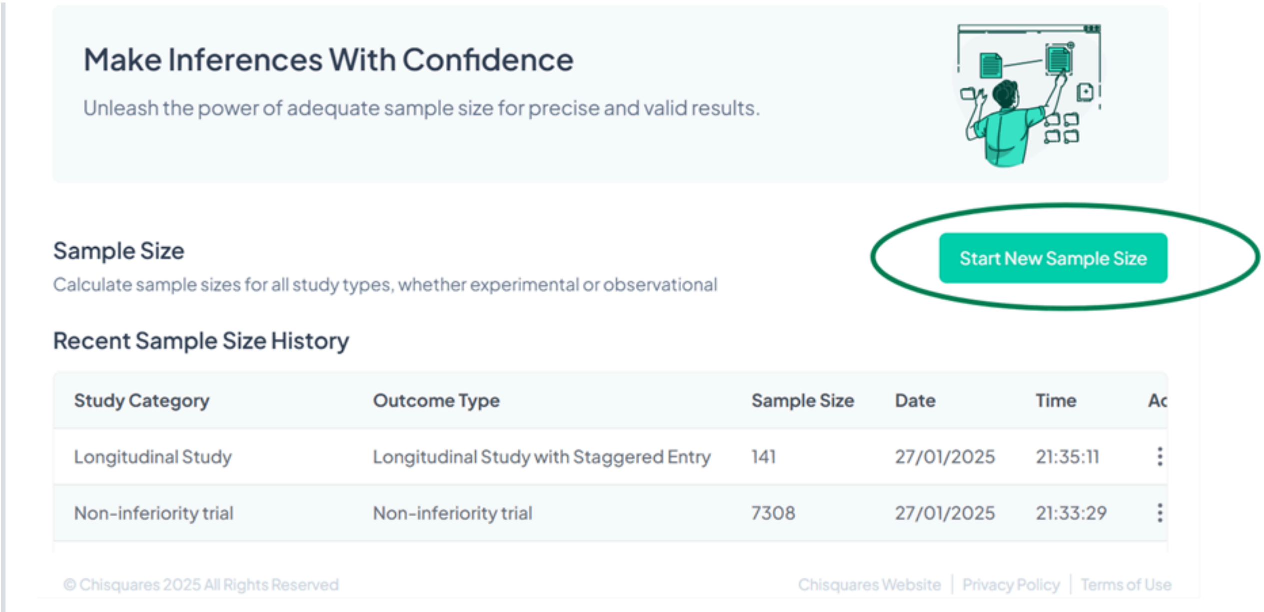
1. Log in to your Chisquares account.

2. From the dashboard, click on **Data Collection** in the navigation bar.

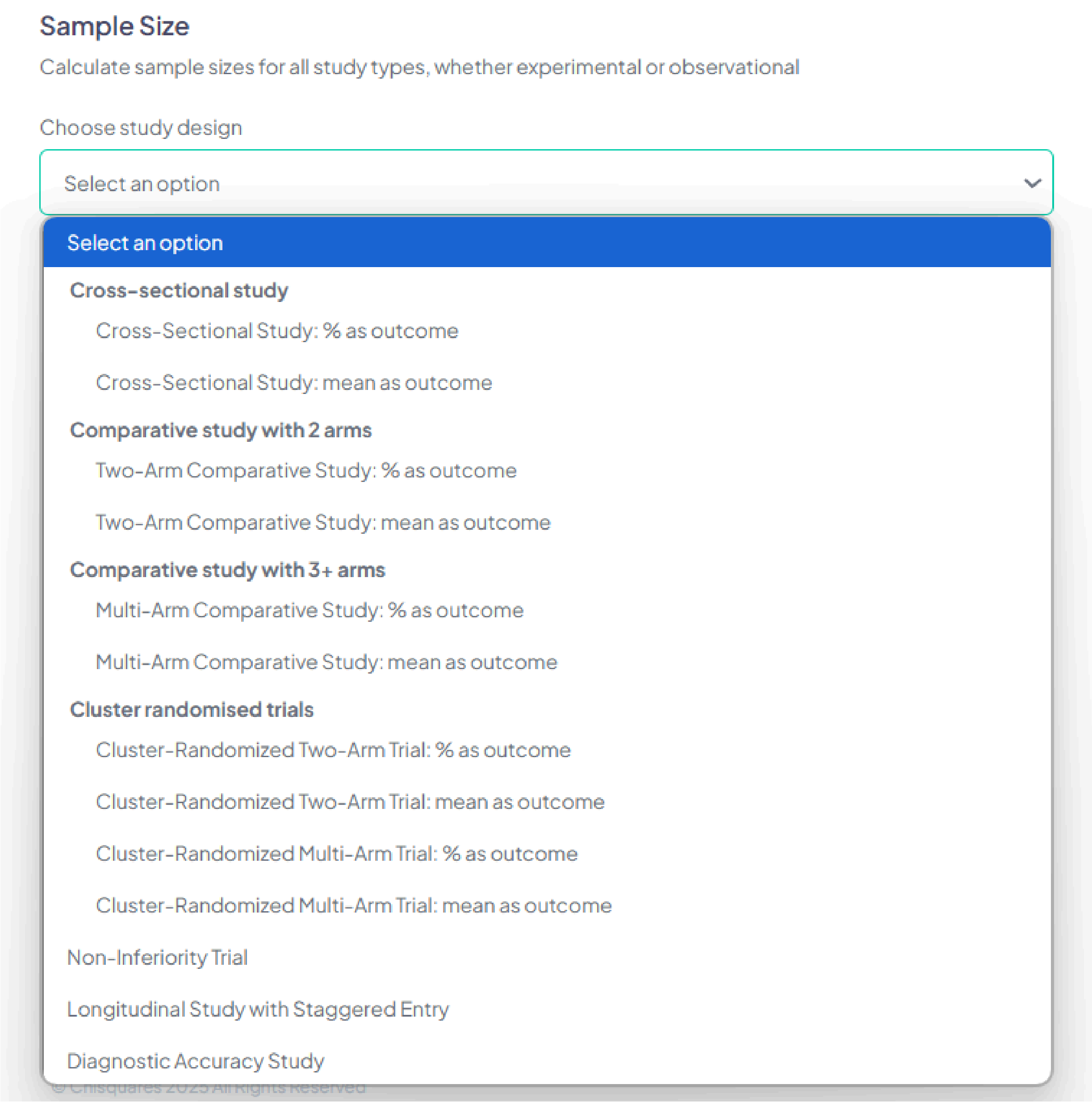
3. From the dropdown, click on **Sample Size**.



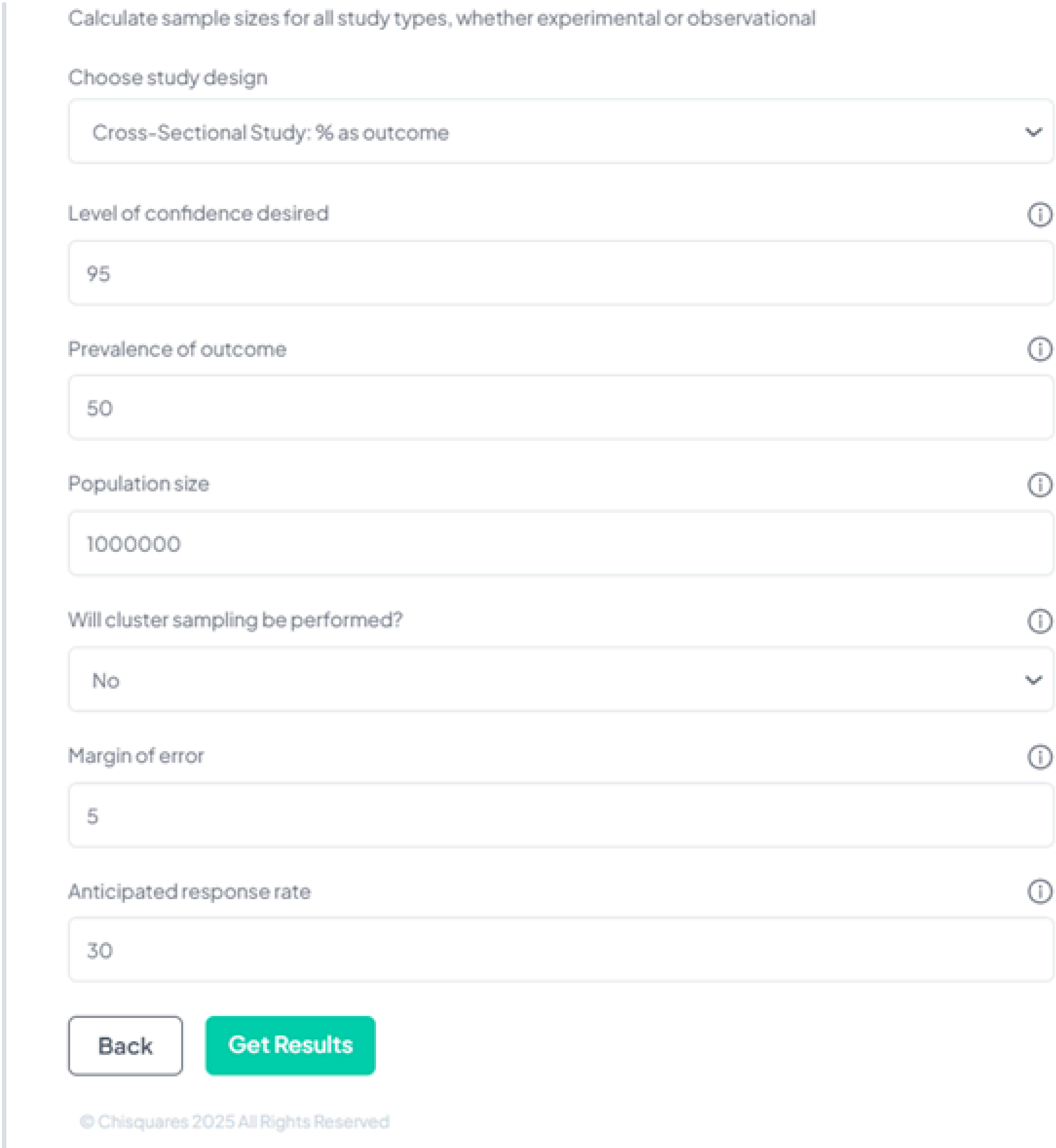
4. Click on the **Start New Sample Size** button.



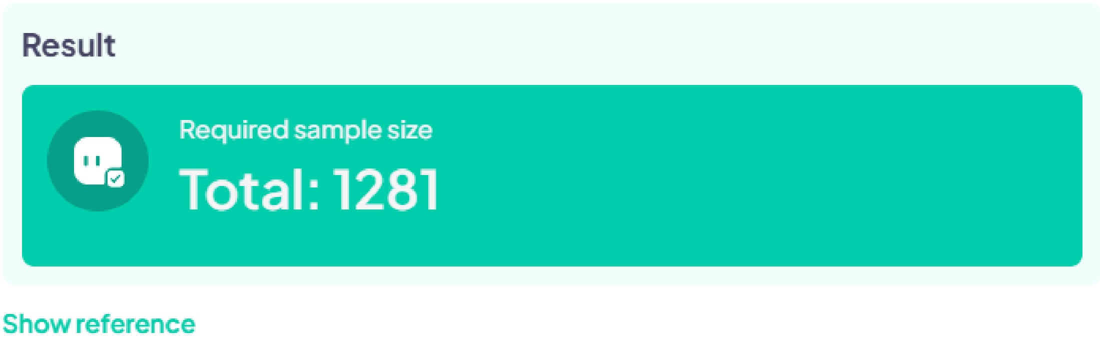
5. Choose the study design to the calculate sample size.



6. Fill in the fields required based on your choice of study design selection.



7. Then click on the **Get sample** button to get the result.



8. Click on the **Show Reference** button to preview the result formula.

Result

Required sample size

Total: 1281

Formula for Cross-Sectional Study: Categorical Outcome

$$n = \frac{Z_\alpha^2 \times \pi \times (1-\pi)}{\varepsilon^2}$$

Download Formula

Where:
· n is the required sample size overall
· Z^α is the Z-score corresponding to the desired level of confidence (e.g., 1.96 for a 95% confidence level).
· π is the expected prevalence or proportion of the outcome in the population
· 1–π is the probability of the outcome not happening.
· ε is the margin of error.

Citation:

Chisquares Inc. Sample Size Calculation for Cross-sectional Studies with Percentage as Outcome. Available at www.chisquares.com. Accessed Jan 30, 2025.

Copy Citation

Hide reference

Additional Features

- **Tooltips:** Hover over the information (i) icon next to each field for detailed explanations.
- **Custom Adjustments:** Users can modify power and confidence levels as needed.

Conclusion

The **Sample Size** module on Chisquares streamlines the calculation process for various study designs, ensuring robust and well-powered research. By selecting the appropriate design and inputting key parameters, users can determine the optimal sample size for their study.

For further assistance, access the **Help?** button in the lower-left for extended support.

Getting Started / Collabowrite / Document Settings

The settings tab

- **Submission timeline:** When toggled on, the user can determine the start and end date of the survey which could be in days or weeks.
- **Document word limit:** This allows to set the maximum word limit for the whole document. From the dropdown list provided, you can choose between No limit (default) to set Global limit, set a limit for each section and set both Global and section limit. Various sections of the document are also made available for editing their individual word limit.
- **Enable AI Writing:** Turning it on allows the AI Assistant to generate document sections, whereas turning it off disables this functionality. When tuned on also, it avails to the user the opportunity to change the writing style. This style could be first person singular, first-person plural or in third person.
- **Set tables and figures limit:** The drop-down arrows enable to increase or reduce the total number of tables that will be allowed in the survey.
- **Number of references allowed:** This feature sets the total number of references that should be included in the survey. It is dependent on the researcher.

The Share/export tab

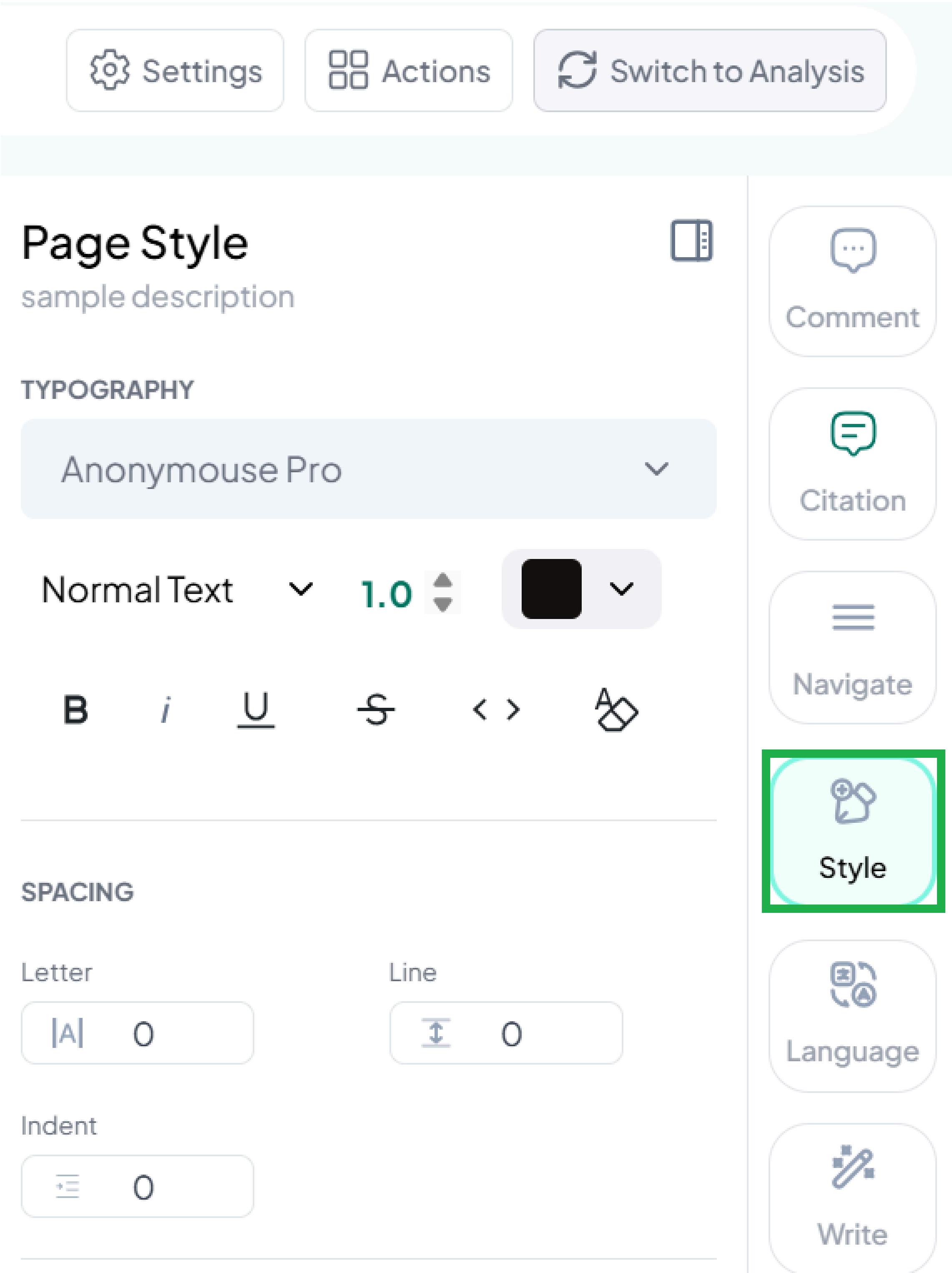
The Export/Share tab in CollaboWrite allows users to easily share and export their documents in various formats. This section provides key functionalities to facilitate collaboration and distribution of content. This on the platform can be done either in PDF, DOC or Latex formats.

Switch Editor tab

This tab grants the user access to switch between the segmented and classic editor. With the segmented editor, the document is divided into multiple segments, making it easier to manage complex write-ups. Each section can be worked on independently, allowing multiple users to contribute without conflicts. Writers can focus on specific parts of the document, reducing distractions from unrelated sections. Once completed, the segmented content can be merged into a cohesive document for final export.

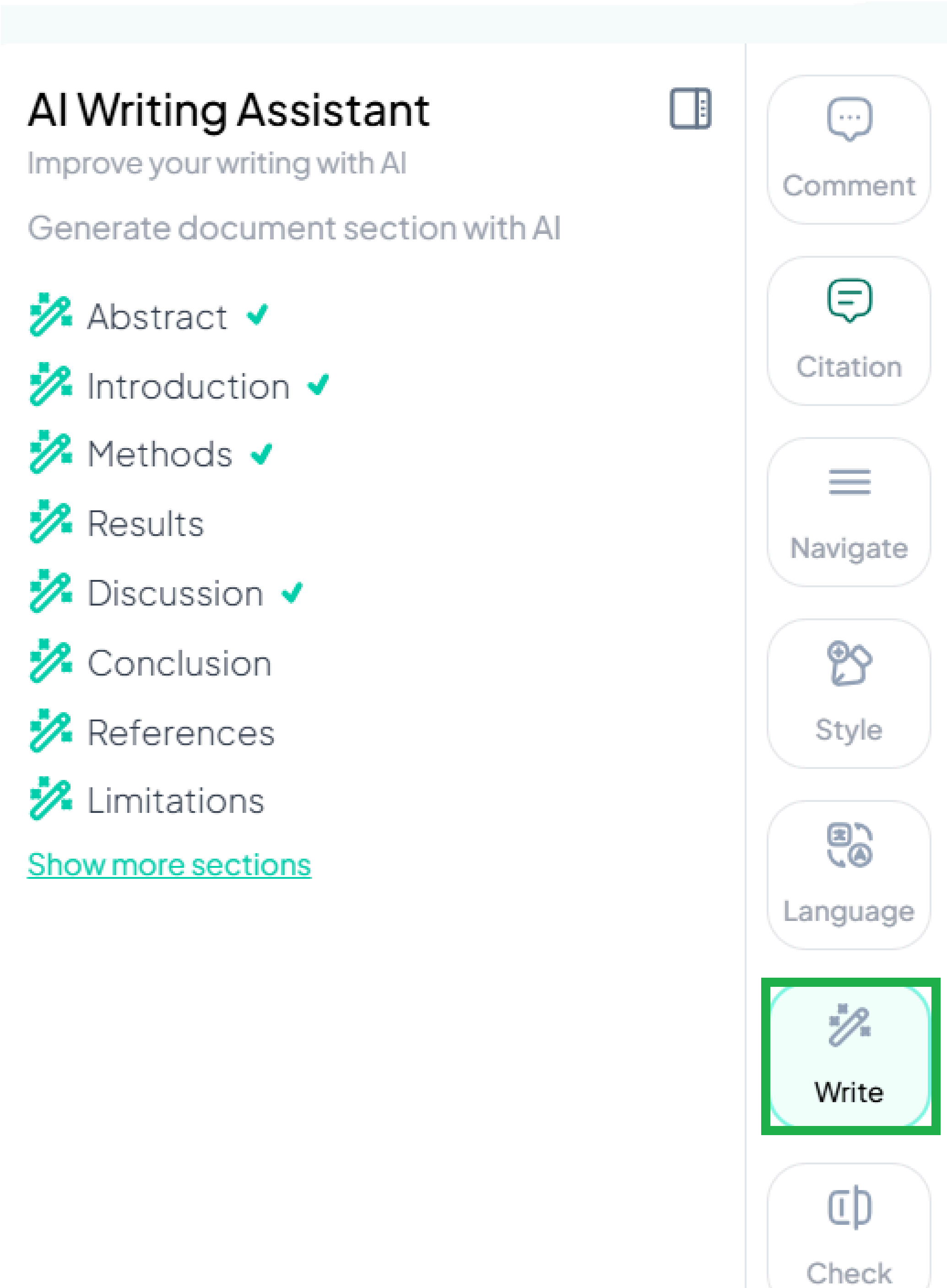
The Classic Write-Up in CollaboWrite on the other hand, provides a traditional, continuous document format for seamless writing and editing. Unlike the segmented approach, it maintains a single, unified text flow, making it ideal for essays, reports, and narratives that require coherence and readability. This format allows for smooth transitions between sections, ensuring a natural writing experience. Users can freely edit, review, and format the content without interruptions, making it well-suited for solo writing or collaborative projects that don’t require divided sections.

The Style Tab



The Style tab in allows users to customize the appearance and formatting of their documents. It provides options to adjust fonts, text size, line spacing, alignment, and color schemes, ensuring a professional and visually appealing layout. Users can apply predefined styles or create custom formatting to maintain consistency throughout the document. This tab is particularly useful for structuring headings, emphasizing key points, and improving readability, making it ideal for reports, presentations, and academic writing.

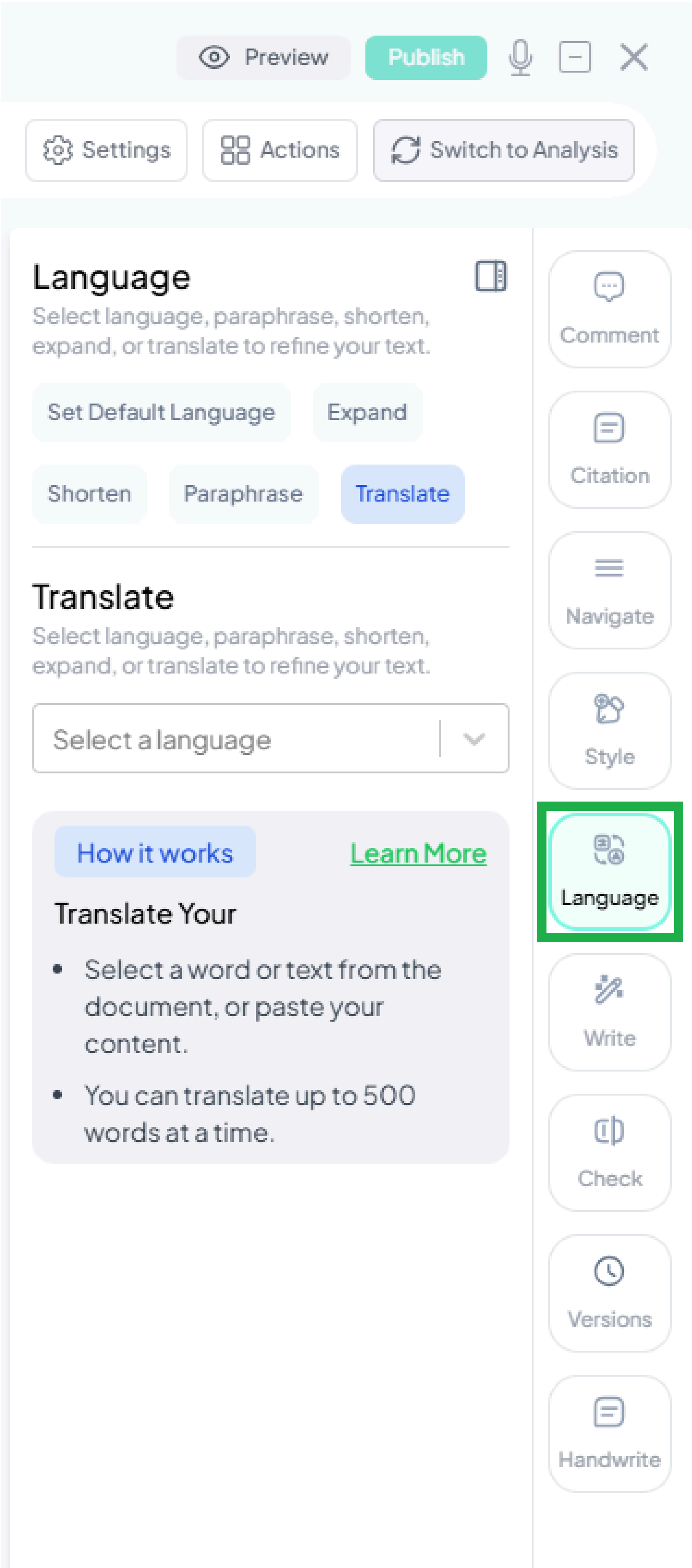
The Write Tab



The Write tab serves as the main editor for drafting and refining content. It offers a clean, distraction-free interface where users can compose and modify text in real time. With auto-saving, formatting tools, and collaborative editing, multiple users can work on the document simultaneously without conflicts. This tab is designed to streamline the writing process, making it ideal for drafting reports, articles, research papers, and other structured documents. The tab also includes AI-powered assistance to generate and structure various segments of a study, enhancing efficiency and coherence in academic and research writing.

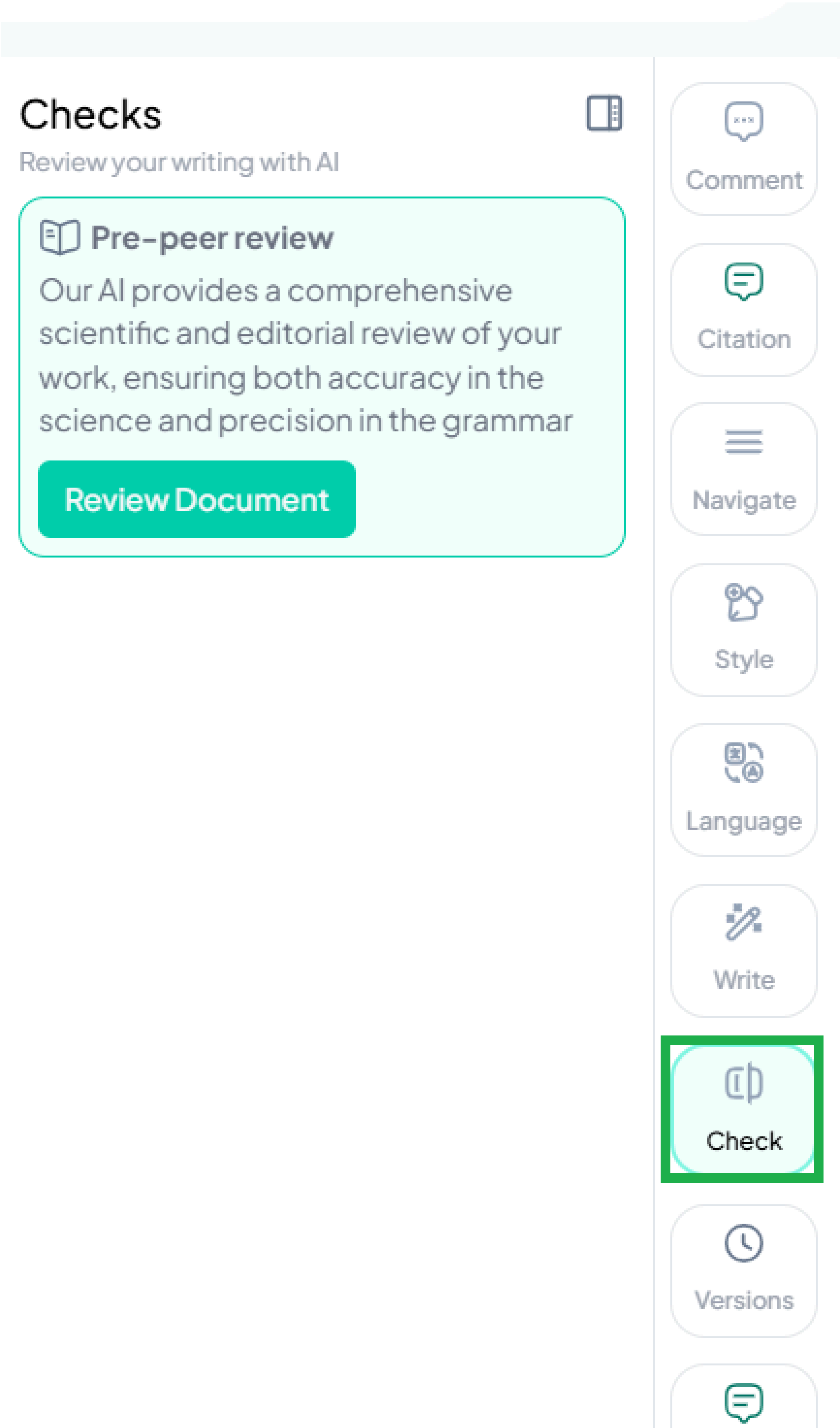
The Translate Tab

The Translate allows users to convert their document into different languages seamlessly. It provides AI-powered translation, ensuring accuracy while maintaining the original context and structure of the content. Users can select a target language and apply translations to specific sections or the entire document. This feature is particularly useful for multilingual collaboration, academic publishing, and global accessibility of research materials.

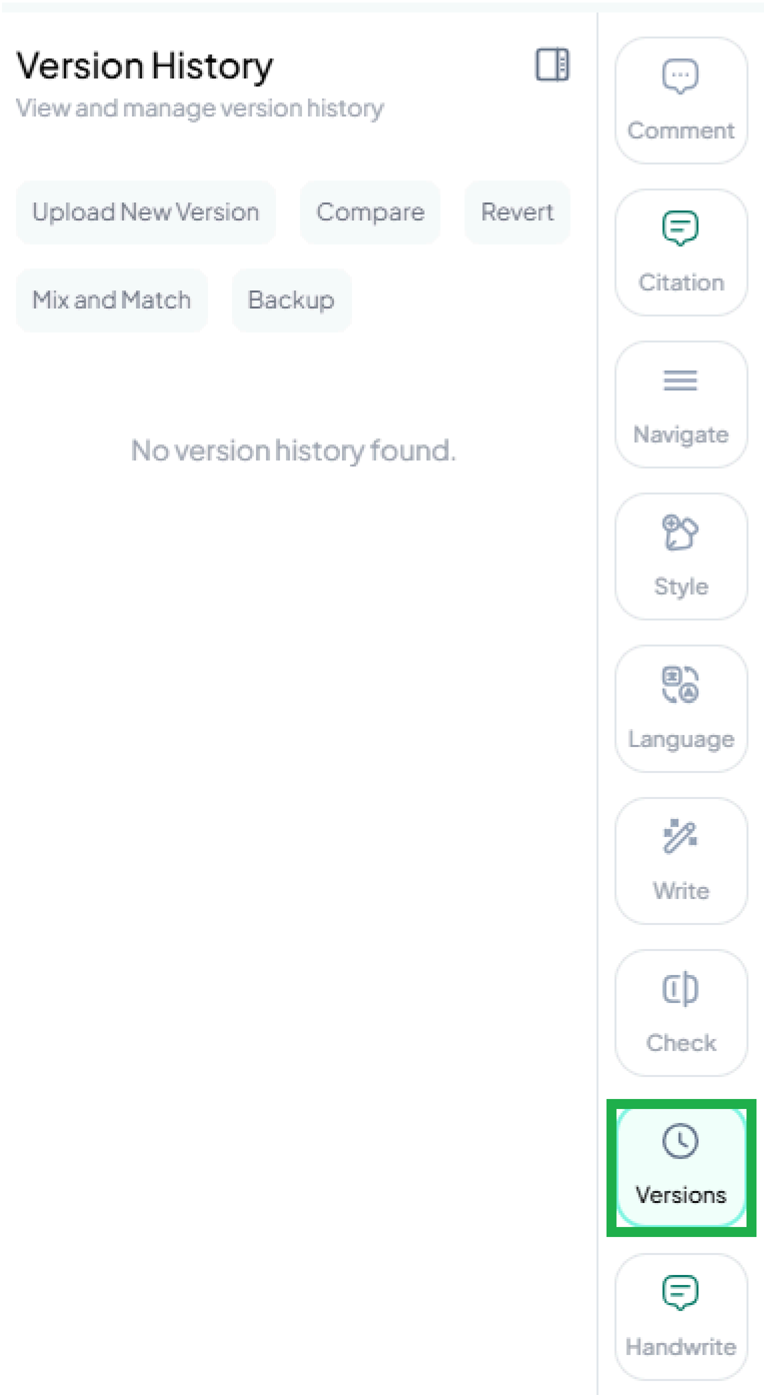

Preview
Publish
Settings
Actions
Switch to Analysis
Language
Select language, paraphrase, shorten, expand, or translate to refine your text.
Set Default Language
Expand
Shorten
Paraphrase
Translate
Translate
Select language, paraphrase, shorten, expand, or translate to refine your text.
Select a language
How it works
Learn More
Translate Your
Select a word or text from the document, or paste your content.
You can translate up to 500 words at a time.
Comment
Citation
Navigate
Style
Language
Write
Check
Versions
Handwrite

The Check Tab

This tab provides tools for reviewing and refining a document to ensure clarity, accuracy, and consistency. It includes features such as grammar and spelling checks, plagiarism detection, and readability analysis to enhance the quality of the text. Users can identify and correct errors, improve sentence structure, and verify originality before finalizing their work. This tab is essential for ensuring professional, polished, and high-quality writing, particularly for academic and research documents.



The Version Tab

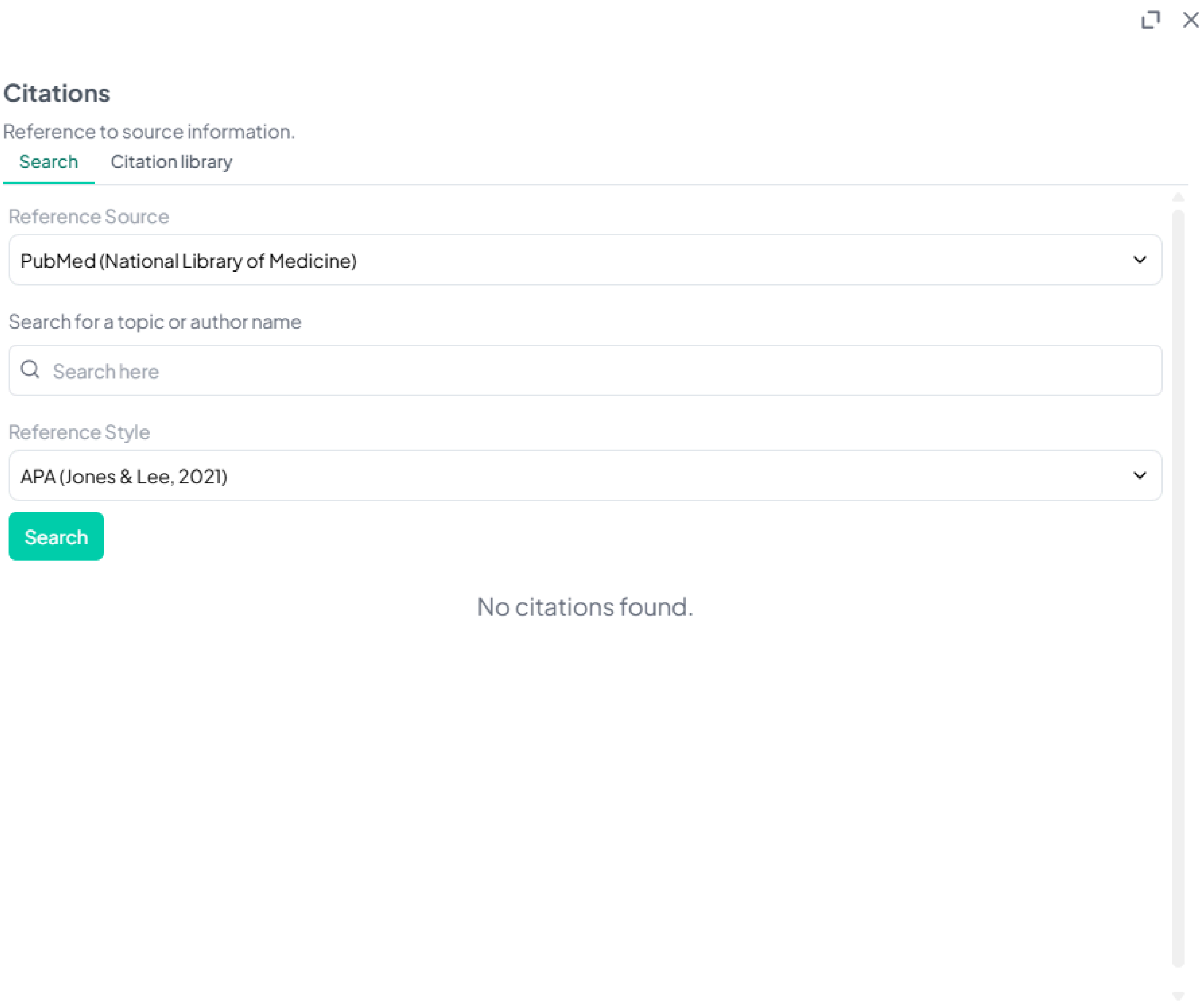


The tab allows users to track and manage different versions of a document. It provides a version history, enabling users to view previous edits, compare changes, and restore earlier versions if needed. This feature ensures that important modifications are recorded, making collaboration more efficient by preventing data loss and allowing for easy revision control. It is particularly useful for academic writing, research papers, and collaborative projects where multiple contributors are involved.

The Handwrite Tab

The Handwrite feature in CollaboWrite allows users to input text using freehand writing or stylus support, making it ideal for annotating documents, sketching diagrams, or writing notes naturally. This feature is particularly useful for users who prefer a handwritten approach, such as researchers making quick annotations, educators providing feedback, or individuals drafting ideas visually. It enhances flexibility by enabling a more intuitive and personalized writing experience within the document.

The Citation Tab

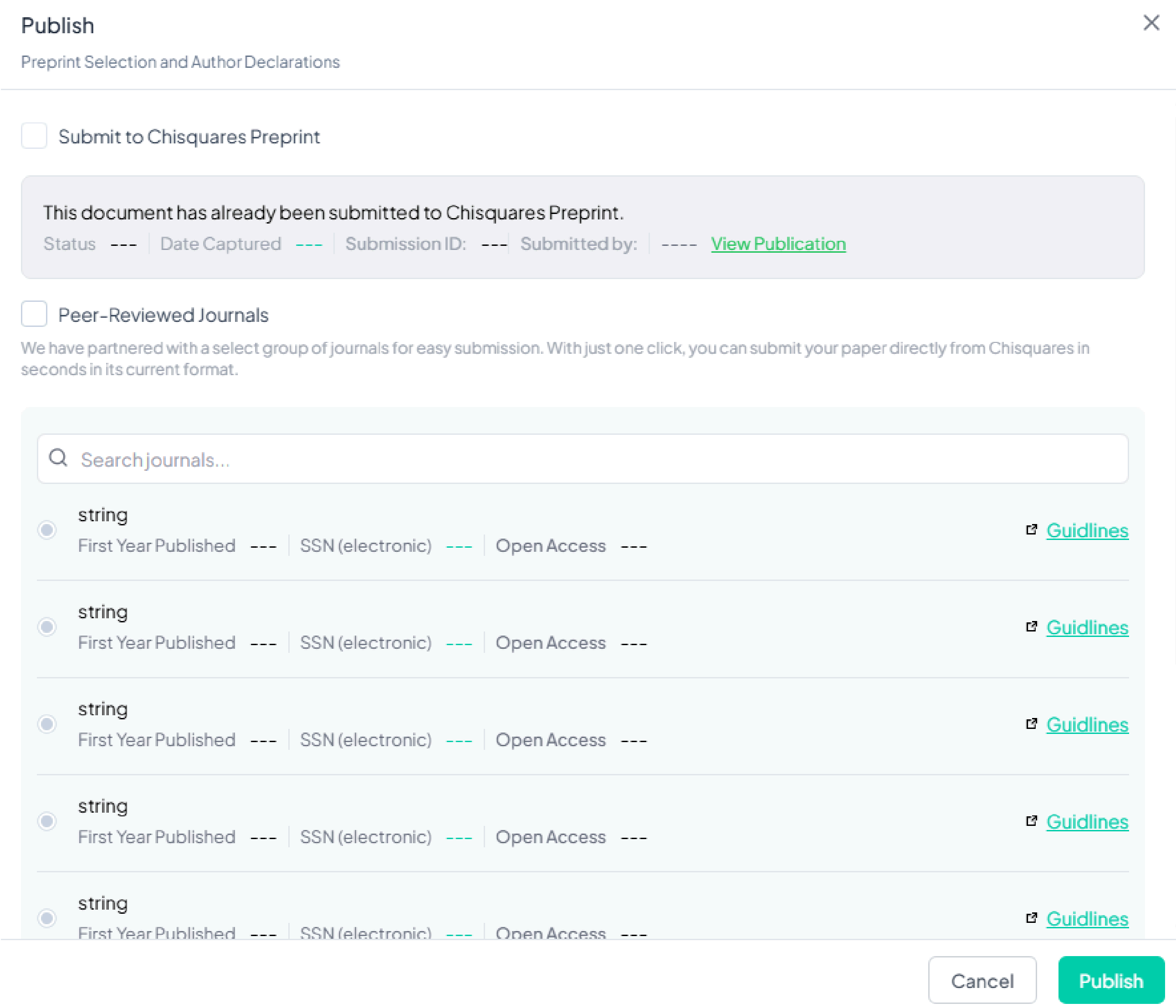


The tab helps users manage and insert references seamlessly within their document. It provides tools for generating, formatting, and organizing citations in various styles such as APA, MLA, Chicago, and IEEE. The platform also offers access to numerous reference sources and citation styles, allowing users to easily find and incorporate relevant sources. Additionally, the tab enables citations to be searched or imported directly, streamlining the process of gathering references. Users can add citations manually, import them from reference management tools, or utilize built-in reference databases. This feature ensures proper attribution of sources, enhancing efficiency and accuracy in academic and research writing.

The Preview

Preview allows users to view their document in a read-only format, providing a final look at the content before exporting or sharing. This feature ensures that formatting, structure, and citations appear as intended without the risk of accidental edits. It is useful for reviewing the document’s layout, verifying consistency, and making final assessments before submission or publication.

The Publish Tab



This tab enables users to submit research documents to preprint servers and peer-reviewed journals. The tab includes an option to submit the document to Chisquares Preprint, with a status update indicating whether it has already been submitted. If a submission has been made, details such as the status, date captured, submission ID, and a link to view the publication are shown. Additionally, the tab supports submissions to peer-reviewed journals, allowing users to search for partnered journals and submit their work in just one click. Journal details, including the first year of publication, electronic ISSN, and open access availability, are displayed to help users choose the right publication outlet. Submission guidelines are also accessible for reference. At the bottom of the tab, users can either cancel the process or proceed with publishing. This feature simplifies the submission workflow, making it easier for researchers to share their work efficiently.

Getting Started / Collabowrite / Documents

Building and Editing Your Manuscript with CollaboWrite

What Is CollaboWrite?

CollaboWrite is Chisquares' built-in, AI-enhanced manuscript writing environment. It combines real-time collaborative editing, structured scientific templates, citation tools, and automated content generation to streamline the publishing process. It is seamlessly integrated with the analysis engine so results from there can be pushed to a project within CollaboWrite.

When to Use It

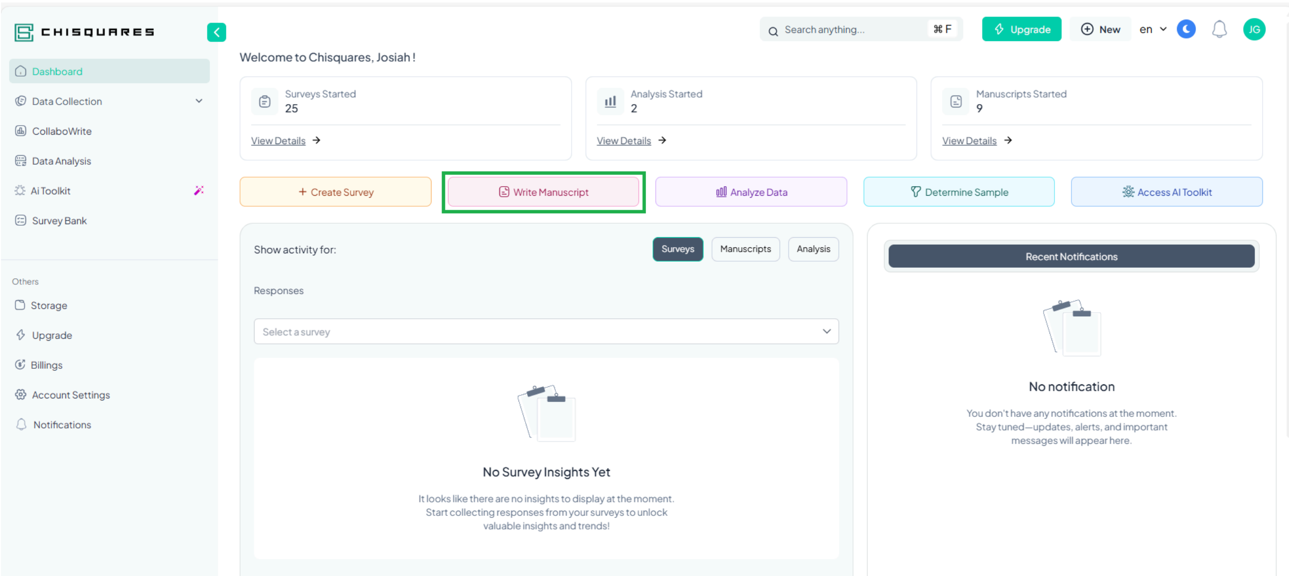
Use CollaboWrite when you:

- Are ready to begin drafting your manuscript
- Want to insert tables and figures with auto-generated text
- Need a collaborative space for editing, commenting, and versioning
- Plan to submit to a journal or preprint server

Where to Access It

From your **Dashboard,** click:

CollaboWrite then create or open your project



You will enter the writing interface structured like a scientific paper:

- Title Page
- Abstract
- Introduction
- Methods
- Results
- Discussion
- References

- Tables & Figures
- Supplemental Material

You can toggle between the segmented and unsegmented editor.

Key Features and How to Use Them

1. **Section Navigation**

Use the side panel to jump between manuscript sections. Sections auto-expand when you add content.

2. **Real-Time Collaboration**

- Colored cursors show who’s editing what
- Edits and comments are synced live across all users

3. **Insert Figures, Tables, and Auto-Generated Text**

- Click **Insert** → Select item
- Chisquares generates structured scientific language based on your results
- Edit as needed

4. **Word counter**

A **Progress Bar** tracks completion of major sections and records the number of words per section.

5. **Lock and Unlock Controls**

Only **Project Owners** can lock/unlock the manuscript

- Prevents unwanted edits during review
- Temporarily unlock to allow batch revisions

6. **Writing Assistant**

Click **AI Help** in any section to:

- Summarize content
- Rephrase or restructure paragraphs
- Suggest citation or conclusion phrasing

7. **Citation Management**

- Add references manually or import from PubMed, BibTeX, or DOI
- Insert citations inline using @ symbol (e.g., @smith2020)
- All references automatically format per selected journal style

8. **Author Declarations and ICMJE Forms**

CollaboWrite handles:

- Author contributions (via WoHrD index)
- Conflict of interest declarations
- ICMJE form completion and export

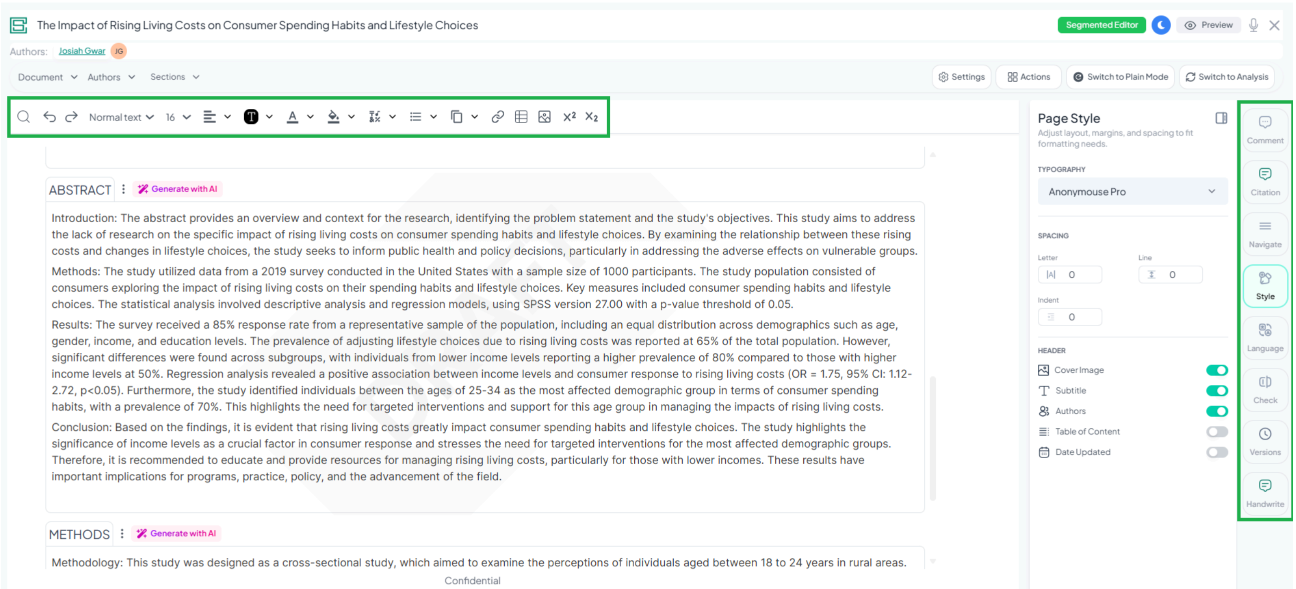
9. **Version History and Recovery**

- Access previous manuscript versions
- View changes, revert, or compare drafts

- Export any version as Word or PDF

10. **Publishing to Preprint or Journal**

- Click **Publish** → Choose preprint server or export for journal submission
- Assign DOI and generate submission packet



Why Use CollaboWrite?

- Integrates writing, data, and analysis in one place
- Eliminates messy Word files and email chains
- Reduces writing time with structured templates and AI support
- Keeps all authors in sync and compliant with journal standards

Managing References and Using the Citation Engine

What Is the Citation Engine?

The Chisquares Citation Engine is a built-in reference management tool that helps users collect, format, insert, and organize citations and bibliographies within manuscripts written in CollaboWrite.

When to Use It

Use the Citation Engine when you:

- Need to add inline citations to support your manuscript content
- Want to import references from trusted sources (PubMed, DOI, BibTeX)
- Require correctly formatted bibliographies for different journals

Where to Find It

In CollaboWrite, click:

References → Add New Reference or **Manage Citations**

How to Add References

1. **Add by DOI**

- Paste a DOI (Digital Object Identifier)
- Chisquares fetches metadata and imports the full citation

2. **Search PubMed**

- Enter author, title, or keywords

- Select matching entry from results
- Click “Add to Library”

3. **Upload a BibTeX File**

- Import a full reference library from Zotero, Mendeley, or EndNote

4. **Manual Entry**

- Fill in citation fields (author, year, title, etc.) manually

How to Use Citations in Your Manuscript

1. Select the text you wish to cite; a tray will display with the citation option, or
2. Select citation from the side panel to trigger its display.

Chisquares inserts an inline citation and updates the References section automatically.

Formatting the Reference List

- Select target journal from a dropdown menu (APA, AMA, Vancouver, etc.)
- Chisquares reorders and formats the bibliography automatically
- Updates occur live when citations are added, removed, or edited

Advanced Features

- **Recent Citations:** Quick access to frequently used references
- **Multiple Styles:** Easily toggle between journal styles

- **Citation Preview:** Hover to preview full citation

Why Use the Citation Engine?

- Eliminates formatting errors
- Saves time by pulling reference data automatically
- Maintains a centralized reference list across collaborators
- Supports reproducibility and submission compliance

Publishing to Preprint Servers and Journals

What Is Publishing on Chisquares?

Once your manuscript is complete in CollaboWrite, you can either submit it directly to a journal or publish it on the Chisquares preprint server — complete with a DOI, metadata, and all supplementary files.

When to Publish

Publish when:

- All manuscript sections are completed
- Tables, figures, and references are finalized
- ICMJE forms and author declarations are filled
- The manuscript has been locked by the Project Owner

Where to Access the Publish Feature

Inside CollaboWrite:

Click **Publish** in the upper-right corner of the manuscript screen You'll be prompted to:

1. Select your **Publishing Destination**:

- Chisquares Preprint Server
- External Journal Submission (via export)

2. Complete required **metadata** fields
3. Choose **included files**: manuscript, tables, figures, supplemental material
4. Assign a **Digital Object Identifier (DOI)** if publishing to preprint

How to Publish to Preprint Server

1. Click **Publish** → Choose **Chisquares Preprint Server**
2. Fill in:

- Article Title
- Abstract
- Author Order and Affiliations
- Keywords and Subject Areas

3. Upload:

- Final manuscript file (auto-generated or custom)
- Tables, figures, appendices (optional)

4. Confirm Author Declarations and ICMJE Forms
5. Click **Submit**

Once approved:

- Your article is assigned a DOI
- A public landing page is created for sharing and citation

How to Export for Journal Submission

1. Click **Publish** → Select target journal
2. Chisquares generates:

- Fully formatted manuscript
- Cover letter template
- Figure files and supplementary material
- Completed author declaration forms

3. Download as a zipped submission package, which is automatically sent via email. You will also be copied on the communication to keep a record of the files.

Why Use Chisquares for Publishing?

- Eliminates manual formatting
- Ensures all forms and files are complete
- Saves time preparing submissions

- Allows early visibility of research via preprint server

Managing Project Versions and Tracking Changes

What Is Version Control in Chisquares?

Version control in Chisquares enables you to track, manage, and restore different versions of your manuscript, datasets, and outputs. This functionality ensures transparency, reversibility, and traceability in collaborative research projects.

Where to Find Version History

In any CollaboWrite project, go to:

Manuscript Toolbar → Version History

How Version Tracking Works

For Manuscripts

- Every save action is timestamped and stored
- Authors can view a timeline of prior versions
- Options available:

  o Compare two versions side-by-side

  o Revert to any saved version

  - o Download a specific version (Word or PDF)

Why Version Tracking Matters

- Supports auditability and reproducibility
- Encourages collaborative accountability
- Prevents loss of critical content during fast-paced editing
- Streamlines journal and preprint submission workflows

Getting Started / Data Analysis

The Data Analysis module in the Chisquares platform is designed to help users uncover trends, make informed decisions, and drive impactful results. This feature provides an intuitive interface for analyzing collected survey data efficiently.

Whether you're conducting academic research, business analytics, or healthcare studies, the Data Analysis module streamlines the process, allowing you to derive meaningful insights.

Features

The Data Analysis module offers powerful functionalities, including:

Data Processing & Analysis

- Import and analyze survey responses with built-in analytical tools.
- Perform statistical operations to identify trends and patterns.
- Generate visualizations for better data interpretation.

Search, Filter & Sorting Options

- **Search Bar** – Quickly locate past analyses using keywords, names, or IDs.
- **Filter** – Narrow down results based on specific parameters.
- **Sort** – Organize analyses based on predefined criteria (e.g., date, relevance).

Automated Insights

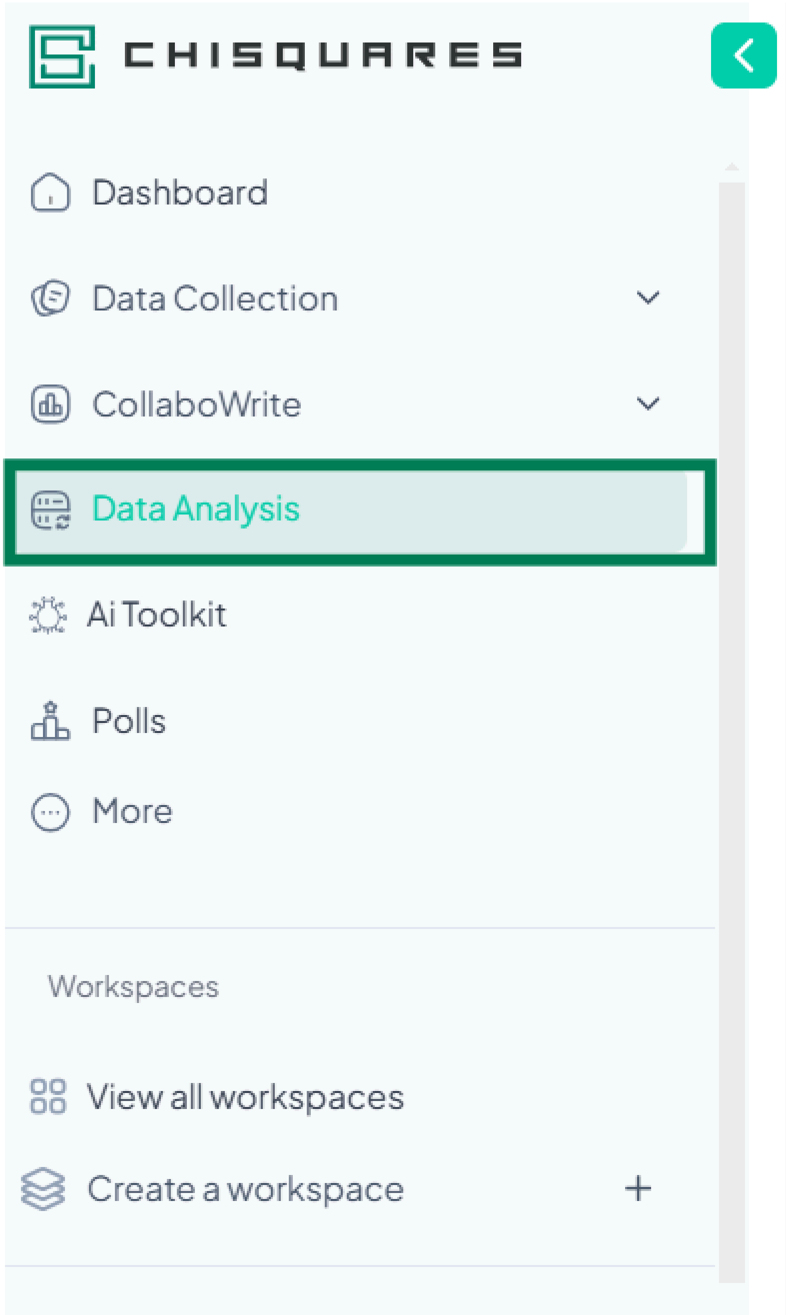
- Get AI-driven recommendations based on response patterns.
- Identify outliers and trends with smart analytics.
  Export & Reporting
- Export analysis results in multiple formats (CSV, PDF, etc.).
- Generate summary reports with actionable insights.

Getting Started

To use the Data Analysis module effectively, follow these simple steps:

1. Accessing Data Analysis Module*

- Log in to your Chisquares account.
- In the left-hand navigation bar, select **Data Analysis**.

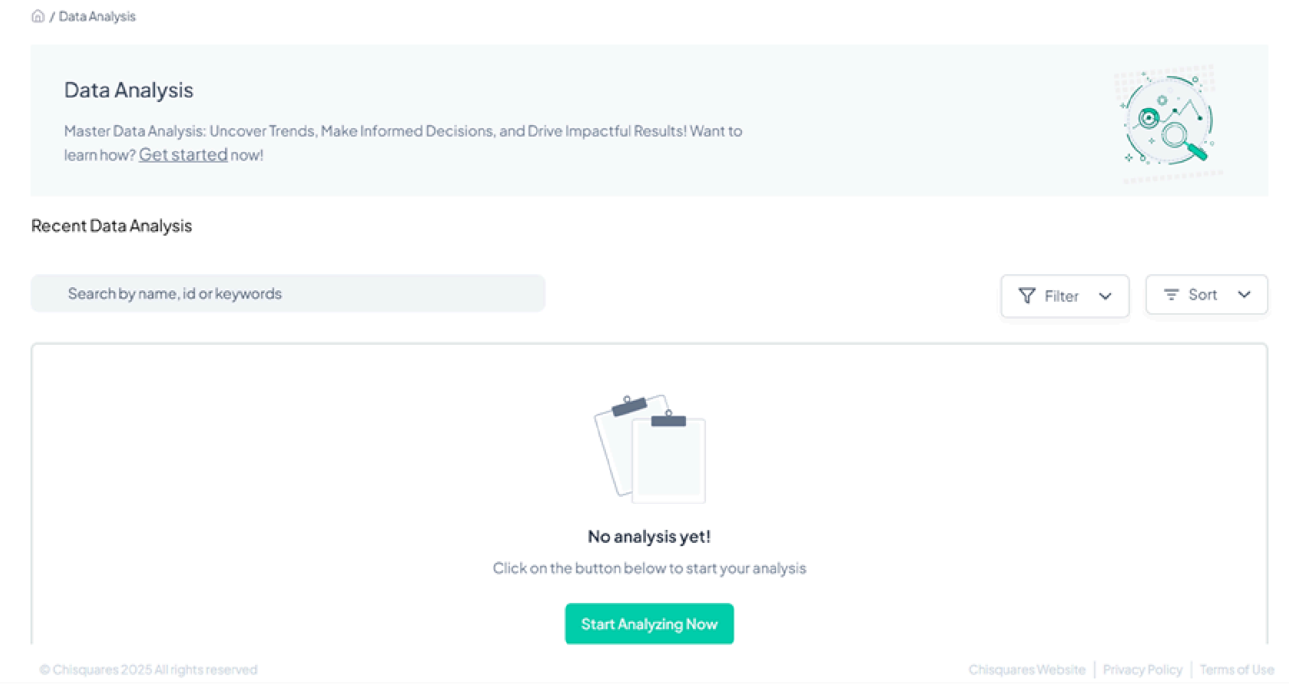


2. Launching the Data Analysis Section

Once you click **Data Analysis**, you will be taken to the Data Analysis page.

Features on This Page:

- Intro text and onboarding link.
- A searchable list of recent analyses.
- A prominent **Start Analyzing Now** button



3. Creating a New Analysis Project

Click the **Start Analyzing Now** button to create a new project.

Required Inputs:

- *Project Title* (mandatory)
- *Project Description* (optional)

After filling in the details, click *Start Analyzing* to proceed.

Uploading and Managing Datasets

What Can You Upload?

Chisquares supports the upload of:

- CSV (.csv)
- Excel (.xls, .xlsx)
- Public datasets (cleaned and curated)
- Survey data collected using the platform itself

Each uploaded dataset becomes part of the current project and can be used for immediate analysis.

When to Upload a Dataset

Upload a dataset when:

- You begin a new analysis
- You want to use public data stored by Chisquares
- You’ve collected survey responses through the platform
- You’re replacing an old dataset with a newer version

How to Upload

1. Go to the Project.
2. Click on Upload Dataset.
3. Choose a source:

o Your Device: Upload CSV or Excel

o Your Storage: Use previously uploaded files

o Public Repository: Browse and select from preloaded government/public datasets

o Collected Surveys: Use data gathered through the Chisquares survey engine

4. Validate file:

o The platform checks file type, structure, and size

o File is converted into a secure and efficient format for internal use

5. Review metadata:

o Dataset name and label

o Number of rows/columns, missing values, date imported

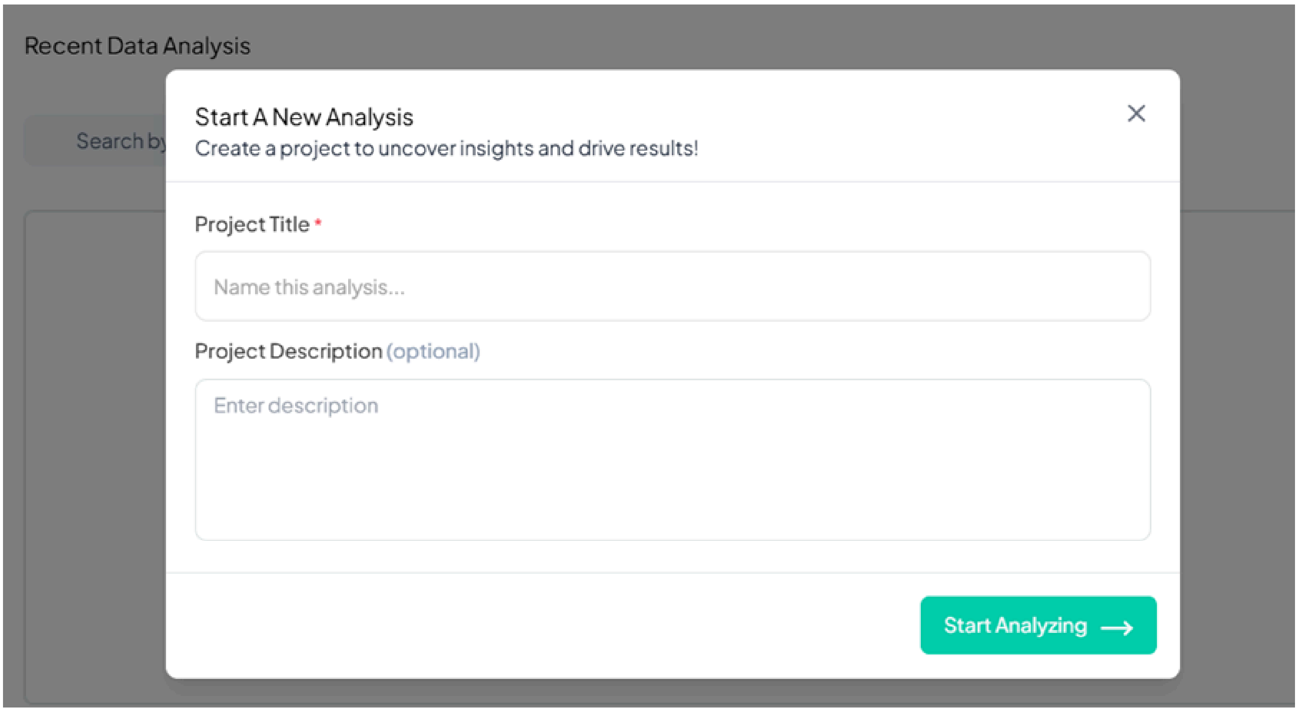
Where to Access Uploaded Data

• Go to the Dataset Codebook (automatically loaded post-upload)

Who Can Upload or View Datasets?

• All collaborators in a project can upload and view datasets

Only **Project Owners** can delete datasets



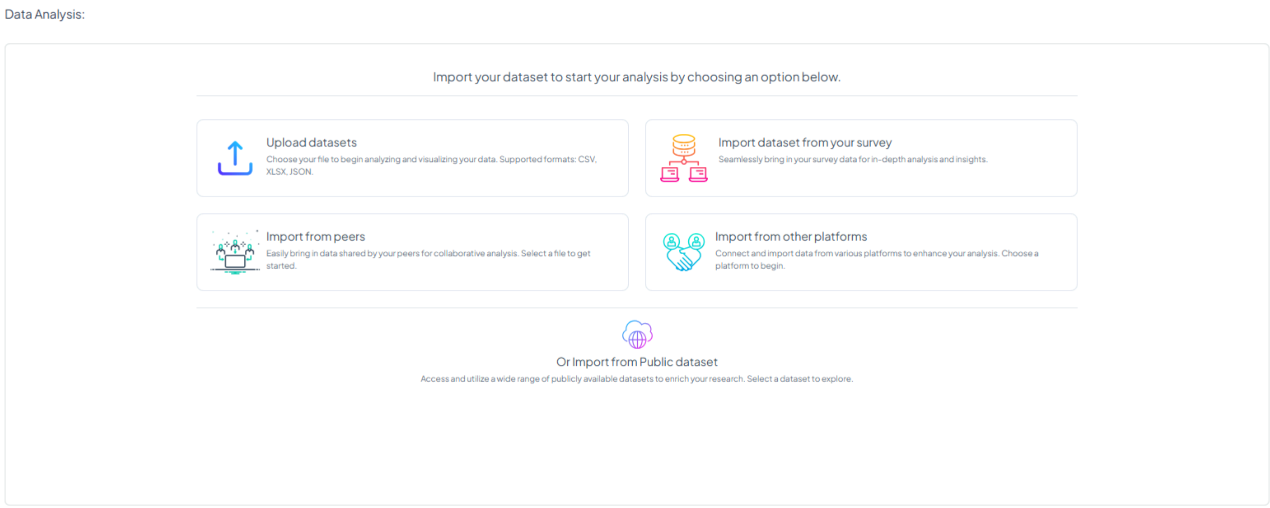
4. Importing a Dataset

You'll now choose how to import data into your project.

Import Options:

- □ *Upload datasets* (CSV, XLSX, JSON)
- □ *Import from your survey*
- □ *Import from peers*
- □ *Import from other platforms*
- □ *Import from public datasets*

Choose the most relevant option for your analysis.

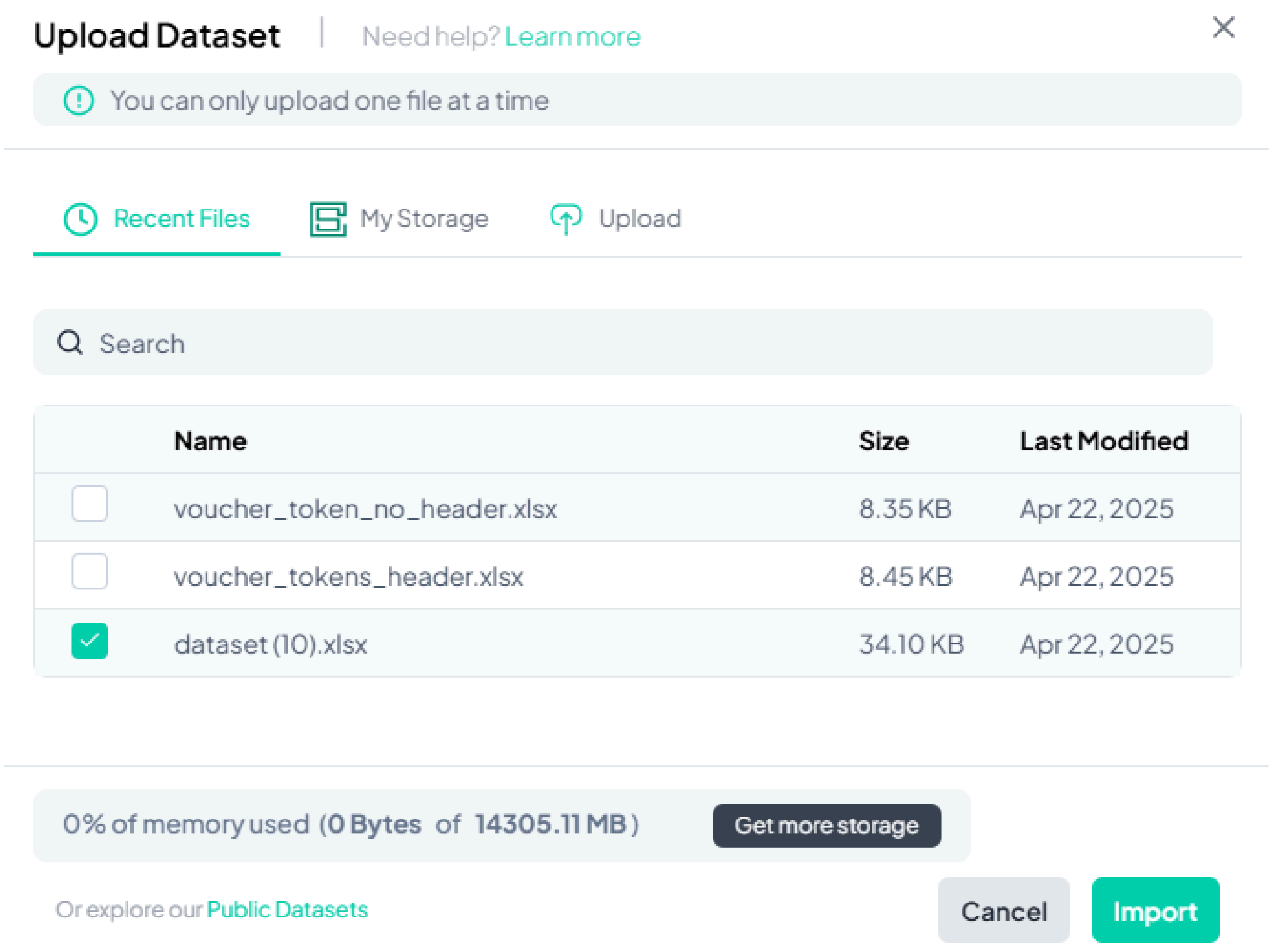


5. Uploading a Dataset

If you select **Upload datasets**, you'll see a file picker screen.

Steps:

- Select from *Recent Files, *My Storage*, or manually *Upload*
- Click to check the dataset
- Click *Import*



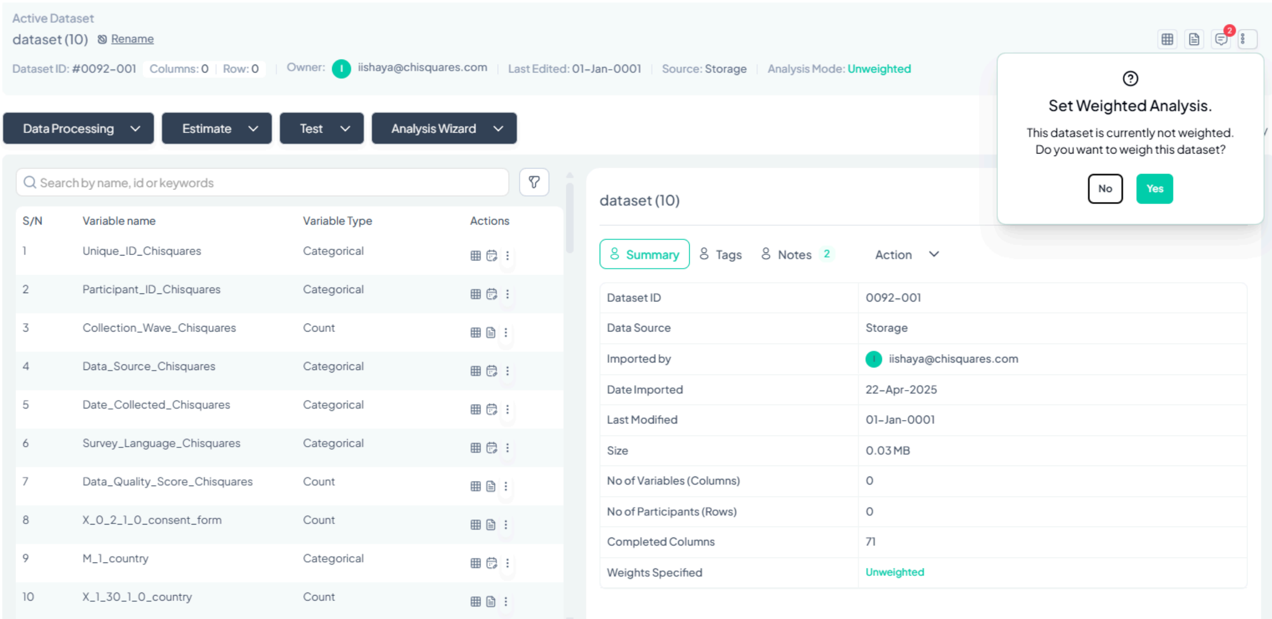
6. Viewing and Managing Your Dataset

Once the dataset is imported:

Key Elements on Screen:

- Dataset information (ID, source, import date, etc.)
- List of variables and their types
- Buttons for **Data Processing**, **Estimate**, **Test**, and **Analysis Wizard**.
- Prompt to enable *Weighted Analysis* (optional)

Click **Yes** to set weights if needed, or **No** to proceed unweighted.



Step 7: Verify Dataset Information

- Check the **Dataset ID** and **Name** at the top left to ensure you're working on the correct dataset.
- Review the **Owner** and **Import Metadata**:
  - **Imported by**: Confirms who uploaded the dataset.
  - **Date Imported**: Date when data was uploaded.
  - **Number of Variables (Columns)** and **Participants (Rows)**: Gives a quick overview of dataset size.

Step 8: Use the Codebook Panel

Click the **Codebook** panel (top right) to:

- View detailed metadata of the selected variable.
- See its distribution and value labels (for categorical).
- Check if the variable has missing values or notes.

Use this before proceeding with analysis to understand your data.

Exploring the Dataset Codebook

What Is the Codebook?

The Dataset Codebook is your control panel for understanding and managing variables in your uploaded dataset. It provides a live overview of your dataset's structure and offers quick access to variable-specific actions like renaming, recoding, visualization, and more.

When Do You Use It?

Immediately after uploading a dataset or whenever you want to:

- Review dataset structure
- Check for missing data
- Perform basic descriptive stats
- Rename, recode, or manage variable types

Where to Find It

Once a dataset is uploaded, Chisquares automatically redirects you to the Dataset Codebook page.

How to Use the Codebook

1. View Dataset Overview • Dataset label and actual file name

- Import date and user
- Size: number of rows (observations) and columns (variables)
- Number of missing data

2. Access both Dataset and Variable View Check the box beside the entire dataset, or beside the specific variable you wish to view its attributes.

- **Dataset Attributes** (summary of all variables)
- **Variable Attributes** (details of selected variable)

3. Explore Variables

Click on any variable to see:

- Five-number summary (for numeric variables)
- Frequencies (for categorical variables)
- Unique values and missing counts

4. Edit or Transform Variables

Next to each variable, you can:

- **Rename** or **Relabel**
- **Recode** values
- **Respecify Type** (e.g., from integer to categorical)
- **Clone** a variable
- **Delete** (with recovery option)

- **Visualize:** plot a graph for the variable
- **Cross-tabulate** with another categorical variable

5. Add Notes and Tags

Tagging helps organize variables:

- Add project-specific notes
- Use searchable tags for easier variable management

6. Review Analysis History

Track all actions taken on the dataset:

- Transformations
- Analyses
- Recode operations

7. Monitor Dataset Modifications

A **“Last Modified”** tag at the top shows the date and time of the most recent change.

Who Can Use the Codebook?

- All collaborators can view and interact with the codebook
- Only users with edit privileges can modify variable settings or delete variables

Why Use the Codebook?

- Gain rapid insight into your dataset’s health and readiness
- Efficiently prepare data for analysis
- Collaborate seamlessly with full traceability of changes

Working with Variables (Rename, Recode, Clone, Delete)

What Is Variable Management?

Variable management allows you to refine your dataset by renaming labels, reclassifying types, cleaning values, and performing basic transformations — all without writing code.

When to Use These Tools

Use these features when:

- Preparing your data for analysis
- Cleaning inconsistent or unclear variable names
- Adjusting variable types (e.g., converting integer to categorical, such as a socioeconomic status indicator coded as “1”, “2”, “3” which should be treated as categorical, not numeric)
- Creating working copies or simplified versions of variables

Where to Find These Options

In the Dataset Codebook or Variable Navigation Bar, hover over or click the three-dot icon beside any variable to access the following actions:

Actions Menu → Rename / Recode / Clone / Delete / Respecify Type

1. Rename Variable Label

• **Purpose:** Make variables easier to understand without affecting the original data name.

• **Use Case:** Rename "v1_age" to "age_at_enrollment"

• **Steps:**

o Click the three-dot menu → Rename

o Enter a new label (max 20 characters)

o Save

• **Validation:**

o Label must be unique

o Must use letters, numbers, or underscores only

2. Recode Variable Values

• **Purpose:** Change values or categories (e.g., merge "Male" and "Other" into one group)

• **Use Case:** Combine similar responses into fewer categories

• **Modes:**

o **Visual** (drag-and-drop interface)

o **Classic** (condition-based logic)

• **Features:**

o Create new variable or replace original

o Treat selected values as missing

o Recover deleted or merged categories

3. Clone Variable

• **Purpose:** Create an exact copy of a variable to test transformations

• **Use Case:** Clone “age” as “age_grouped” for categorization

• **Steps:**

1. Click the three-dot menu → Clone
2. Provide a unique name for the new variable
3. Save

4. Delete Variable

• **Purpose:** Remove an unwanted variable from your dataset

• **Use Case:** Remove a variable that was erroneously created to avoid confusion. • **Steps:**

1. Click the three-dot menu → Delete
2. Confirm deletion
3. Restore from history using “Recover” option

5. Respecify Variable Type

• **Purpose:** Adjust how a variable is treated during analysis (e.g., integer vs. categorical)

• **Use Case:** Reclassify a scale score as categorical for group comparisons

• **Steps:**

o Click the three-dot menu → Respecify Type. You can also reclassify variables from the arrow beside each variable's classification on the codebook

o Select new type (numeric, categorical, date, string)

o Confirm

• **Validations:**

o Note that the system automatically ensures that each type switch is compatible with data format.

o E.g., cannot convert string to numeric unless values are strictly numbers

Why This Matters

Clean, accurate, and well-structured variables: • Improve analysis quality

• Reduce manual errors

Visualizing Variables and Creating Charts

What Is Visualization in Chisquares?

Visualization lets you convert variable distributions into clear, customizable graphics. It helps explore data trends, identify outliers, and generate publication-ready figures.

When to Visualize Variables

Use visualization to:

- Understand variable distributions
- Compare groups and categories
- Create manuscript-ready figures
- Explore relationships between variables

Where to Find It

You can visualize any variable by:

1. Going to the **Dataset Codebook** or **Variable Navigation Bar**
2. Clicking the visualize icon next to a variable
3. Once the visualization is shown, you can change the type into any of the alternatives shown.

How Visualization Works

1. Default Visualization

- When you click “Visualize,” Chisquares creates a basic histogram by default.

• Missing values are excluded. • Visualization is done with unweighted data.

Why Visualize?

• Improve understanding of data distribution and spread

• Identify errors or outliers before analysis

• Generate figures for publication or peer review

• Save time on formatting and exporting visuals

Transforming Data – From Simple Calculations to Complex Recoding

What Is Data Transformation?

Data transformation allows you to modify existing variables or create new ones from them — whether by performing arithmetic, changing formats, or grouping values. It's the bridge between raw data and insightful analysis.

When to Use Transformations

Use transformation tools when you need to:

• Convert continuous data into categories (e.g., age groups)

• Calculate new variables (e.g., BMI, income-to-poverty ratio)

• Extract information from strings or dates

• Standardize formatting for analysis

Where to Access Transformation Tools

There are two main places to initiate transformations:

• From the **three-dot menu** next to a variable in the Variable Navigation Bar

• From the **Data processing** panel in the Dataset Codebook

Types of Transformations Available

 Single Variable Transformations

• **Numeric Adjustments:** log, sqrt, exponent, cube, reciprocal

• **Scaling and Standardizing**

• **Extract Date Components:** Year, Month, Day

• **Calculate Date Differences** (vs. a fixed date)

• **String Split by Delimiter**

• **Arithmetic with Constants:** Multiply/divide/add/subtract a constant

 Recoding Variables

• **Visual Recode (Drag & Drop):**

o Reclassify categorical or continuous variables

o Merge, rename, isolate or group values

• **Classic Recode (Rules-based):**

o Create rules using logical operators (e.g., Age ≥ 18 AND < 35)

 Composite Variable Generation • Boolean Logic Builder:

o Create categories based on multiple variables (e.g., Male AND Smoker)

• **Mathematical Functions:**

o Add, subtract, multiply or divide multiple variables

• **Date Interval Calculations:**

o Number of days/months/years between two date variables

• **Unique Combinations:**

o Cross-classify two categorical variables

How to Perform a Transformation (Example: Recoding Age)

1. Click the **three-dot icon** beside the variable “Age”
2. Choose **Recode → Visual Method**
3. Drag 0–12 into a group and label “Preteens”
4. Drag 13–19 into a group and label “Teens”
5. Continue for “Young Adults”, “Middle-Aged”, “Older Adults”
6. Choose whether to:

o Replace the original variable OR

o Create a new one (e.g., age_grouped)

7. Click **Confirm**

Who Can Use Transformation Tools?

All project collaborators have access to transformation tools, but only those with edit permissions can apply irreversible changes like deletion.

Why It Matters

Transforming your data prepares it for meaningful analysis. These tools are designed for:

• Flexibility (visual or logic-based options)

• Transparency (actions tracked in history)

• Speed (no-code interface with point-and-click)

Running Your First Analysis with the Estimate Section

What Is the Estimate Section?

The Estimate section is where you generate tables and figures summarizing your data. This includes population characteristics, mean and prevalence estimates, trends, and regression models. It supports seamless manuscript generation by allowing you to insert outputs directly into your document — with explanatory text.

When to Use It

Use the Estimate section when you're ready to:

• Describe your sample (e.g., age, sex, education)

• Report descriptive statistics (means, prevalence)

• Examine trends over time or across groups

• Run regressions (logistic, linear, etc.)

• Populate your manuscript with text and figures

Where to Find It

Navigate to:

Analysis → Estimate Section

Then select one of the available modules:

• **Population Characteristics**

• **Mean Estimates**

• **Prevalence Estimates**

• **Trend Analysis**

• **Regression Models**

• **Analysis Wizard** (guided setup)

How to Run an Estimate

Step 1: Select the Population

• Analyze the **entire dataset** (default), or

• Define a **subset** using filters (e.g., Age ≥ 18, Gender = Female)

• A live count of matching rows will appear

Step 2: Choose Your Variables

• Select one or more **outcome variables** (numeric or categorical)

• For stratified analysis, optionally choose grouping variables

• Specify variable types or reclassify if needed

Step 3: Customize Output Settings

• Choose confidence intervals or standard deviations

• Toggle inclusion of missing values

• Set cutoff thresholds for precision (e.g., coefficient of variation)

Step 4: Click "Analyze"

• Chisquares generates a **modal popup** with:

o **Table** of estimates

o **Figure** (auto-generated chart)

o **Metadata** (population subset, weights, method, etc.)

Step 5: Push to Manuscript

Choose one of the following:

• Push Table to Manuscript (adds with text summary)

• Push Figure to Manuscript (adds with caption)

• Push Both

• Download results or share via link/email

Why Use It?

The Estimate section:

• Produces manuscript-ready outputs

• Includes structured text based on results

• Automatically tracks source variables, filters, and settings

• Saves hours on formatting and copy/paste tasks

Using the Regression Analysis Module

What Is Regression Analysis?

Regression analysis allows you to examine the relationship between one or more independent variables and a dependent (outcome) variable. It is essential for uncovering trends, associations, and predictive relationships in your data.

When to Use It

Use regression when you need to:

• Adjust for confounding variables

• Predict outcomes based on multiple inputs

• Estimate associations between variables (e.g., odds ratios)

• Test hypotheses about linear or non-linear relationships

Where to Find It

Navigate to:

Analysis → Estimate Section → Regression Models

You'll find options for:

• Linear Regression

• Binary Logistic Regression

• Probit Regression

• Ordinal Logistic Regression

• Multinomial Logistic Regression

• Poisson and Negative Binomial Models

How to Set Up a Regression Model

Step 1: Choose subsetting of the population

• You may run models on subsets of your dataset or on the whole dataset

If using a subset of the population, define subset criteria using filters and operators (e.g., Age ≥ 18)

Step 2: Choose Outcome Variable

• Must be numeric or categorical, depending on model type

• The platform filters variable types based on selected model

Step 3: Choose Predictor Variables

• Use multi-select dropdown to choose independent variables

• Recode or respecify variables if necessary

Step 4: Specify Settings

• Choose reference groups for categorical predictors

• Select data weighting (if applicable)

Step 5: Run the Model

• Click **Analyze**

• Chisquares displays:

o Regression coefficients

o 95% Confidence Intervals

o p-values

o Goodness-of-fit indicators (R^2, pseudo R^2, etc.)

o Metadata and model diagnostics

Step 6: Push to Manuscript

• Add results as:

o Table only

o Figure only

o Both table and figure

o Full text interpretation

Why Use This Module?

The regression module:

• Ensures model validity with smart defaults and validations

• Generates formatted outputs and interpretations

• Reduces risk of coding errors and inconsistencies

• Supports transparent and reproducible modeling

Creating and Using Tables for Prevalence and Means

What Are Prevalence and Mean Tables?

These are structured summary tables that show either: • **Prevalence:** Percent of the population with a given characteristic

• **Mean:** Average value of a numeric variable

These outputs are manuscript-ready and can be stratified by one or more grouping variables. The tables are designed to mirror what's expected in scientific publications.

When to Use This Feature

Use when you need to:

- Report percentages or averages
- Compare metrics across subgroups (e.g., age, gender)
- Highlight public health trends or disparities
- Generate tables with text for the Results section

Where to Find It

Go to:

Analysis → Estimate Section → Prevalence Estimates or **Mean Estimates**

How to Create a Table

Step 1: Define Population

- Default: Analyze the entire dataset
- Optional: Define a subpopulation using filters (e.g., Gender = Female, Age ≥ 50)
- Live preview shows number of eligible rows

Step 2: Choose Outcome Variables

• For **Mean Tables:** Only numeric variables are allowed

• For **Prevalence Tables:** Only categorical variables are allowed

• Use “Show Eligible” button to filter based on variable type

Step 3: Choose Stratification Variables (Optional)

• Select one or more categorical variables to break down results by group

• Automatically generates separate results for each subgroup

Step 4: Customize Display

• Choose output style:

o Means with standard deviations

o Means with 95% confidence intervals

• Adjust Coefficient of Variation cutoff to suppress imprecise estimates

Step 5: Click “Analyze”

Chisquares generates:

• A **table** with your results

• A **figure** for visual summary

• Metadata on filters, stratification, and weights used

What You Can Do With the Output

• **Push Table to Manuscript:** Inserts formatted table and descriptive text

- **Push Figure to Manuscript:** Inserts graph only
- **Push Both:** Complete results + graphics
- **Download Table:** Save locally as CSV or Excel
- **Share Results:** Send link to collaborators

Why Use This?

- Automates formatting for publication
- Built-in logic ensures accurate stratification and interpretation
- Saves hours on manual calculations and chart building

Performing Trend Analyses Across Time or Groups

What Is Trend Analysis?

Trend analysis allows you to evaluate how a variable changes across time or across categories such as geographic regions or demographic groups. It is especially useful in epidemiological and public health studies to detect patterns and shifts.

When to Use Trend Analysis

Use trend analysis to:

- Detect increases or decreases in prevalence or means

• Identify seasonal or regional variations

• Evaluate intervention effects over time

Where to Access It

The trend analysis feature is not a stand-alone feature but is nested within Mean estimate or Prevalence estimate set-ups. There is a checkbox, which when enabled, allows the user to supply the time variable for trend, which must be an integer variable.

To access trend analysis, navigate to:

Analysis → Estimate Section →Mean/Prevalence Estimates Trend Analysis checkbox

How to Run a Trend Analysis

Step 1: Select the Population

• Analyze full dataset or define a subset (e.g., Females age ≥ 50)

• Use filters to define subgroups

• System displays eligible rows in real-time

Step 2: Choose the Outcome Variable

• Select a categorical or numeric variable whose trend you want to assess

• Examples: smoking status, income level, BMI

Step 3: Choose the Trend Variable

• Select the variable that defines time or group order

• Must be ordinal (e.g., Year, Age Group, Region Rank)

• Use respecify tool if your trend variable is misclassified

Step 4: Optional – Stratify by Additional Variables

• Add a secondary grouping variable (e.g., Gender)

• Enables side-by-side trend comparison

Step 5: Run the Analysis

• Click **Analyze**

• Chisquares generates:

o A **line chart** visualizing the trend

o A **trend table** with summary statistics

o Statistical output including p-values for linear trend (if applicable)

o Metadata about dataset, filters, and groupings

Step 6: Export or Insert Into Manuscript

• Push figure, table, or both to the manuscript with accompanying text

• Download as image/CSV or share a link

Why Use This?

• Visually summarize changes over time or ordered categories

- Automatically test for statistical significance of trends
- Quickly populate your manuscript with interpretable figures
- Saves time generating graphs and formatting text

Using the Analysis Wizard (for Beginners)

What Is the Analysis Wizard?

The Analysis Wizard is a guided, step-by-step assistant that helps new or non-technical users set up their analyses quickly and accurately. It simplifies the decision-making process by suggesting options and validating choices at each stage.

When to Use It

Use the wizard if you:

- Are unfamiliar with statistical methods
- Want help selecting variables, models, or settings
- Prefer a conversational setup process

Where to Find It

Navigate to:

Analysis → Analysis Wizard

How the Wizard Works

Step 1: Choose One Main/Primary Outcome (1 single variable)

• Choose the main outcome variable

• Specify or confirm its type

Step 2: Choose 1-5 Secondary Outcomes

• Choose your secondary outcome variables (numeric or categorical) • Specify or confirm their type

• The wizard checks variable type and compatibility

Step 3: Select Main Predictor or Exposure Variable

• Choose the main predictor variable

• Specify or confirm its type

Step 4: Choose the Demographic or other key variables (e.g., confounders)

• Choose independent variables for regression

• Select categorical variables to stratify outputs

• Wizard filters available options by type

Step 5: Review Summary

• The Wizard displays your selections:

o Population characteristics

o Outcome and predictors

o Type of analysis suggested

Step 6: Run Analysis

• Click **Continue** to launch the appropriate module (e.g., regression, prevalence, trend)

• Output is generated as usual with table, figure, and metadata

Step 7: Push Results to Manuscript

• Choose to push outputs directly into your manuscript

• Download, export, or share with your collaborators

Why Use the Wizard?

• Speeds up analysis setup

• Removes guesswork for beginners

• Prevents invalid selections and incompatible inputs

• Provides explanations and examples along the way

Exporting, Sharing, and Saving Your Results

What Can You Export or Share?

Once your analysis is complete, you can export or share: • Tables (CSV, Excel, or HTML)

• Figures (PNG or SVG)

• Auto-generated text (editable)

• Full datasets or transformed versions

When to Export or Share

• Finalizing your manuscript

• Collaborating with co-authors or reviewers

• Presenting your results externally

• Backing up key outputs

Where to Access Export and Sharing Options

From any modal or result popup:

Click **Download, Share,** or **Push to Manuscript** buttons at the bottom You can also access:

• **Data Export** tools from the **Dataset Codebook**

Exporting Results

Tables

• Export as **CSV, Excel,** or **HTML**

• Automatically formatted for manuscript or submission

Figures

• Download as **PNG** (for presentations)

Auto-Generated Text

- Text pushed to the manuscript can be copied, exported, or edited directly

Step 9: Prepare Your Data

Click the **Data Processing** dropdown for options such as:

- **Clean Data**: Handle missing values, remove duplicates.
- **Recode Variables**: Combine or modify values in categorical variables.
- **Create Derived Variables**: Generate new variables from existing ones.

Ensure your dataset is tidy and formatted before running tests.

Step 10: Choose Analysis Type

You have three main options:

1. Estimate
Use this when you want to:

- Compute *descriptive statistics* (e.g., mean, median, proportion).
- Estimate *confidence intervals*.

2. Test

- Use this to perform parametric and non-parametric statistical tests.
- Select your test from the *Test* dropdown menu.

3. Analysis Wizard
For guided analysis:

- Click **Analysis Wizard** to launch a step-by-step assistant.
- Ideal for non-technical users or those unfamiliar with stats.

Additional Features

Actions Menu (for Each Variable) Each variable has an *Actions* column with icons for:

- Viewing variable distribution.
- Editing metadata or applying transformations.
- Tagging for quick filtering.

Weights & Modes

- Analysis Mode: Unweighted indicates that weights are not applied.
- If weights are needed, use **Data Processing > Apply Weighted Analysis**.

Best Practices

- Always start with a *Codebook review* before analysis.
- Tag key variables to organize large datasets.
- Use *Notes* to document analytical assumptions or data issues.
- Periodically export or back up analysis from the *Analysis History*.

Conclusion

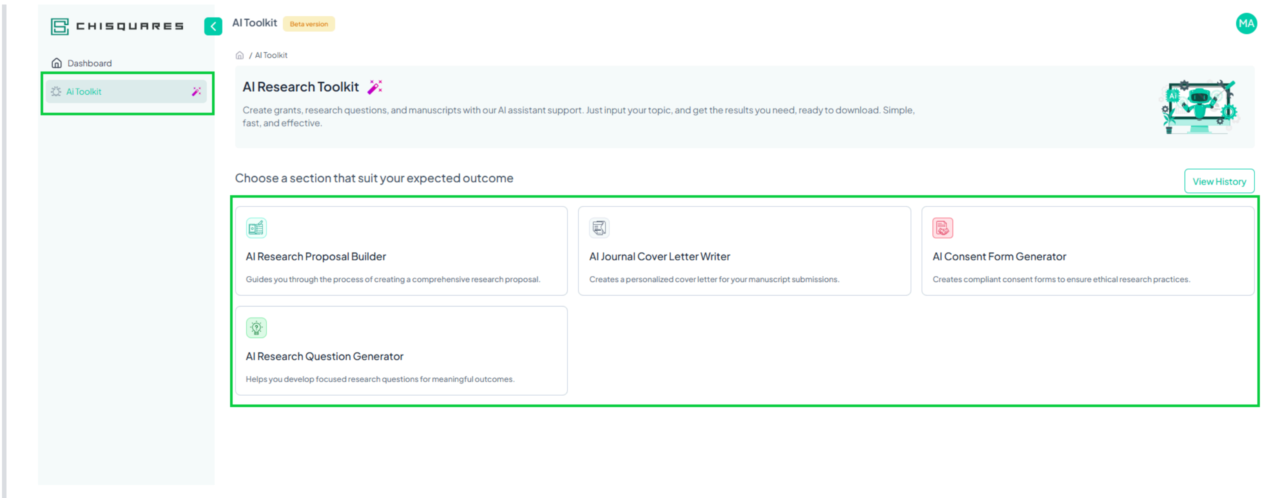
The Chisquares Data Analysis module is a powerful tool for transforming survey responses into actionable insights. With an intuitive design and robust filtering options, users can efficiently analyze their data and make informed decisions.

For further assistance, access the **Help?** button in the lower-left for extended support.

Getting Started / AI Research Toolkit

The **AI Research Toolkit** on the **Chisquares Platform** is an intuitive and intelligent module designed to streamline your research processes. Whether drafting a proposal, crafting a journal cover letter, generating research questions, or developing consent forms, this toolkit leverages AI to accelerate your research workflow.

Each tool within the module offers simple input fields tailored to specific research needs. Users are encouraged to refine and customize AI-generated content to ensure accuracy and relevance.



Accessing the Toolkit

1. Log into your Chisquares account at https://chisquares.com.
2. Navigate to the **AI Toolkit** section.
3. Select the desired tool from the tool tabs:

- AI Research Proposal Builder
- AI Journal Cover Letter Writer
- AI Consent Form Generator
- AI Research Question Generator

You may switch tools using the **Switch Tools** dropdown menu at any time without losing saved progress.

Tool-by-Tool Guide

Tool 1: AI Research Proposal Builder

Purpose: Guides users step-by-step in creating a structured and compelling research proposal.

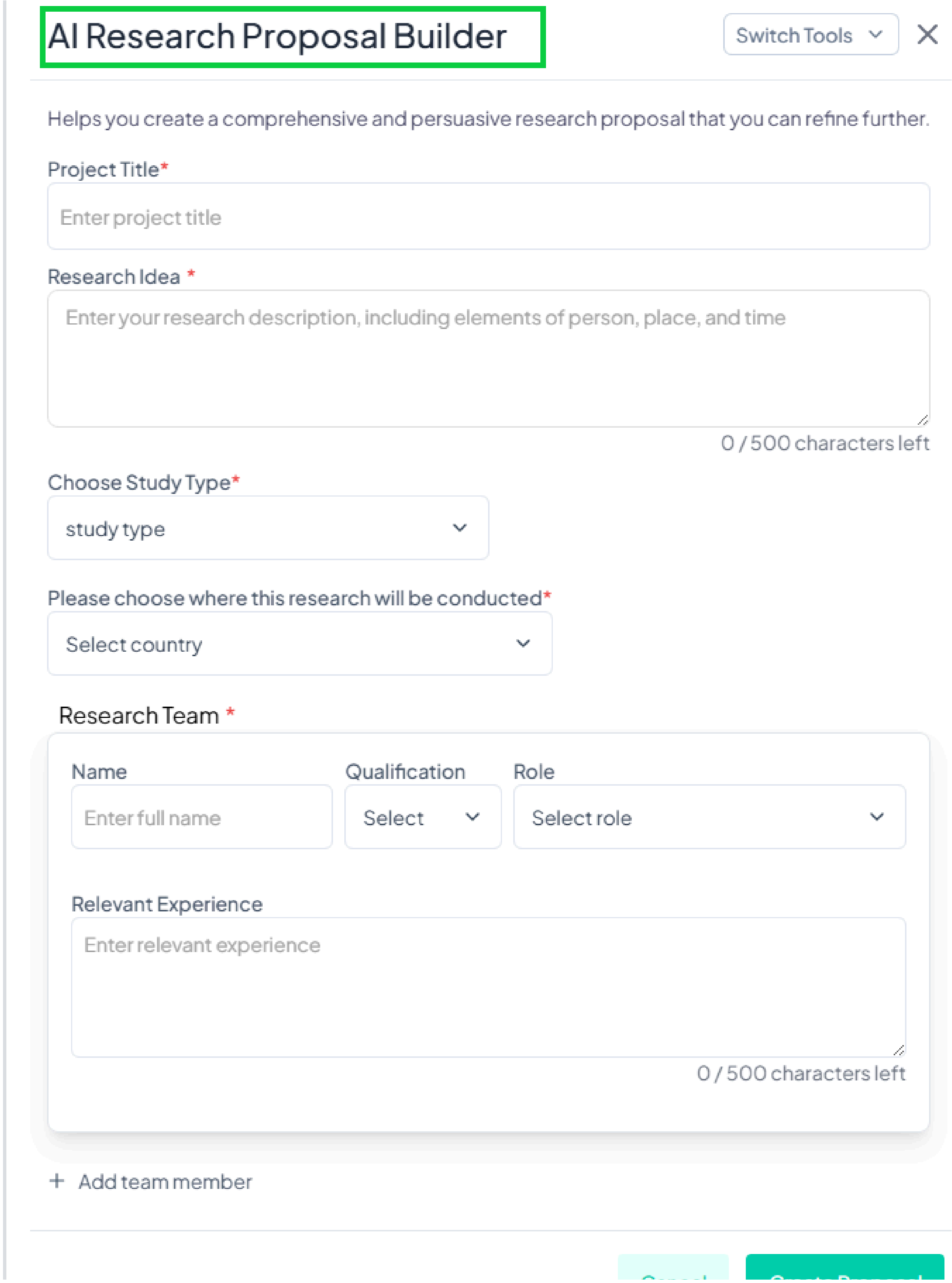
Input Fields:

- **Project Title** *(Required)*: Enter the title of your proposed research.
- **Research Idea** *(Required)*: Describe your idea, including elements of person, place, and time (Max 500 characters).
- **Study Type** *(Required)*: Choose the appropriate study design (e.g., Prospective Cohort, Cross-Sectional).
- **Location** *(Required)*: Select the country where the research will be conducted.
- **Research Team:**
    - **Name:** Enter full name.
    - **Qualification:** Select the qualification from the dropdown.

- **Role:** Choose the role (e.g., Principal Investigator, Co-Investigator).
- **Relevant Experience:** Describe each member's relevant experience (Max 500 characters).
- Use **"Add Team Member"** to include additional personnel.

Actions Buttons:

- `Create Proposal`: Generates and displays the AI-powered proposal.
- `Cancel`: Clears the form without saving.


AI Research Proposal Builder
Switch Tools
Helps you create a comprehensive and persuasive research proposal that you can refine further.
Project Title*
Enter project title
Research Idea *
Enter your research description, including elements of person, place, and time
0 / 500 characters left
Choose Study Type*
study type
Please choose where this research will be conducted*
Select country
Research Team *
Name
Qualification
Role
Enter full name
Select
Select role
Relevant Experience
Enter relevant experience
0 / 500 characters left
+ Add team member

Tool 2: AI Journal Cover Letter Writer

Purpose: Automatically creates a polished and customized cover letter for journal submissions.

Input Fields:

- **Name of Journal** *(Required)*: Enter the full name of the target journal (Max 500 characters).
- **Manuscript Title** *(Required)*: Provide the title of your manuscript (Max 500 characters).
- **Abstract** *(Required)*: Paste the abstract of your manuscript (Max 5000 characters).

Actions Buttons:

- `Create Cover Letter`: Generates a ready-to-use cover letter.
- `Cancel`: Clears the form.

AI Journal Cover Letter Writer

Switch Tools

Automatically creates a personalized and compelling cover letter to accompany your manuscript submissions.

Name of Journal *

Enter the name of the target journal

0 / 500 characters left

Manuscript Title *

Enter manuscript title

0 / 500 characters left

Enter your Manuscript's abstract *

Enter your manuscript's abstract

0 / 5000 characters left

Cancel Create Cover Letter

Tool 3: AI Consent Form Generator

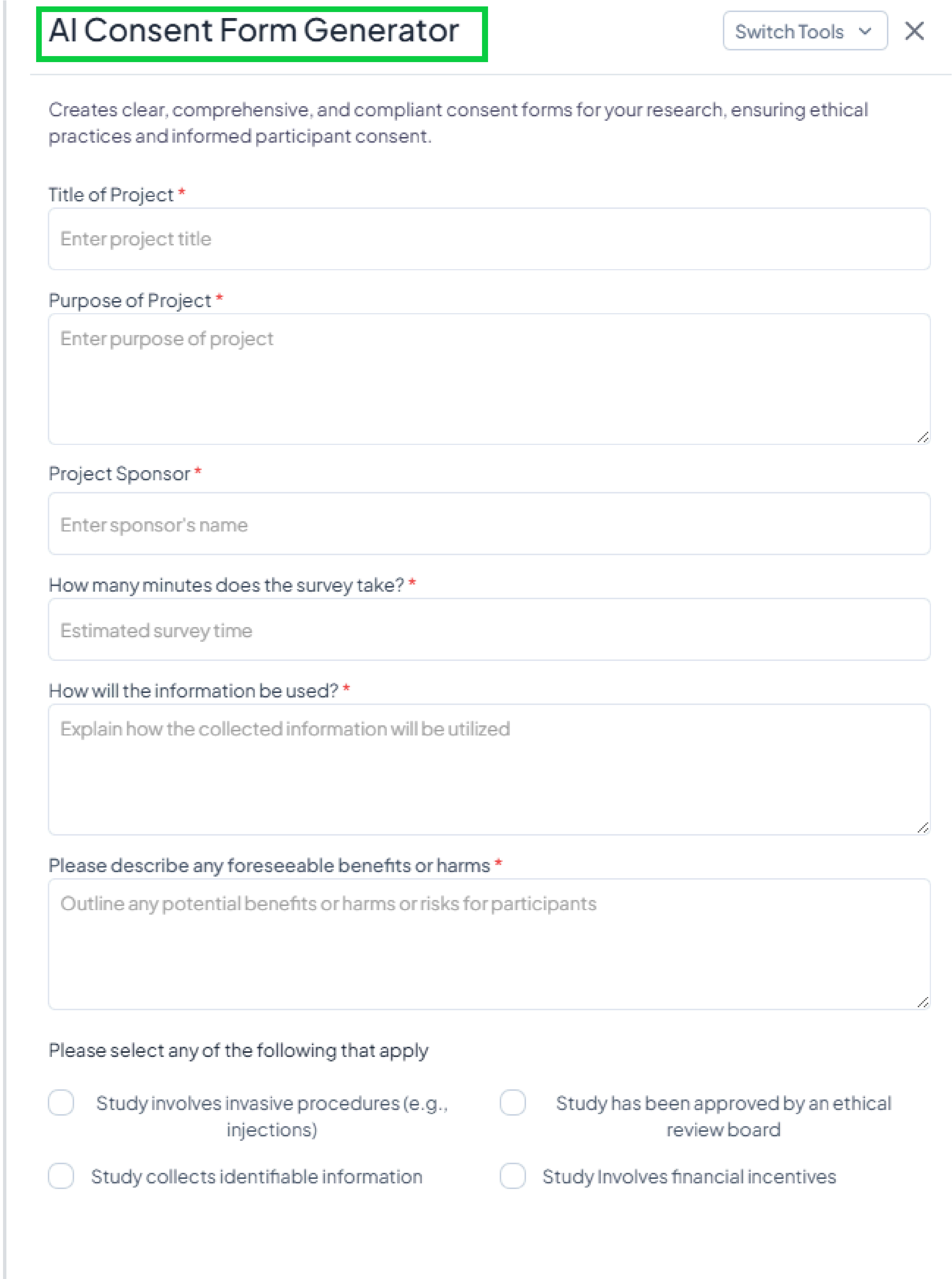
Purpose: Generates ethically compliant and participant-friendly consent forms.

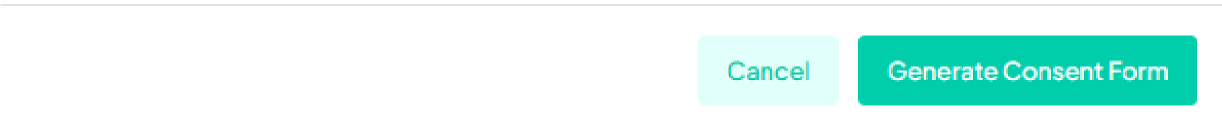
Input Fields:

- **Title of Project** *(Required)*: Provide the project title.
- **Purpose of Project** *(Required)*: Describe the study's purpose.
- **Project Sponsor** *(Required)*: Name the funding sponsor.
- **Estimated Survey Time** *(Required)*: Specify how long the survey will take (in minutes).
- **Data Usage** *(Required)*: Explain how the information will be used.
- **Benefits or Harms** *(Required)*: Describe any potential risks or benefits to participants.
- **Additional Conditions:** (Optional checkboxes)
  - Study involves invasive procedures
  - Study approved by an ethical review board
  - Study collects identifiable information
  - Study includes financial incentives

Actions Buttons:

- `Generate Consent Form`: Creates the participant consent document.
- `Cancel`: Clears the form.


AI Consent Form Generator
Switch Tools
Creates clear, comprehensive, and compliant consent forms for your research, ensuring ethical practices and informed participant consent.
Title of Project *
Enter project title
Purpose of Project *
Enter purpose of project
Project Sponsor *
Enter sponsor's name
How many minutes does the survey take? *
Estimated survey time
How will the information be used? *
Explain how the collected information will be utilized
Please describe any foreseeable benefits or harms *
Outline any potential benefits or harms or risks for participants
Please select any of the following that apply
Study involves invasive procedures (e.g., injections)
Study has been approved by an ethical review board
Study collects identifiable information
Study Involves financial incentives



Tool 4: AI Research Question Generator

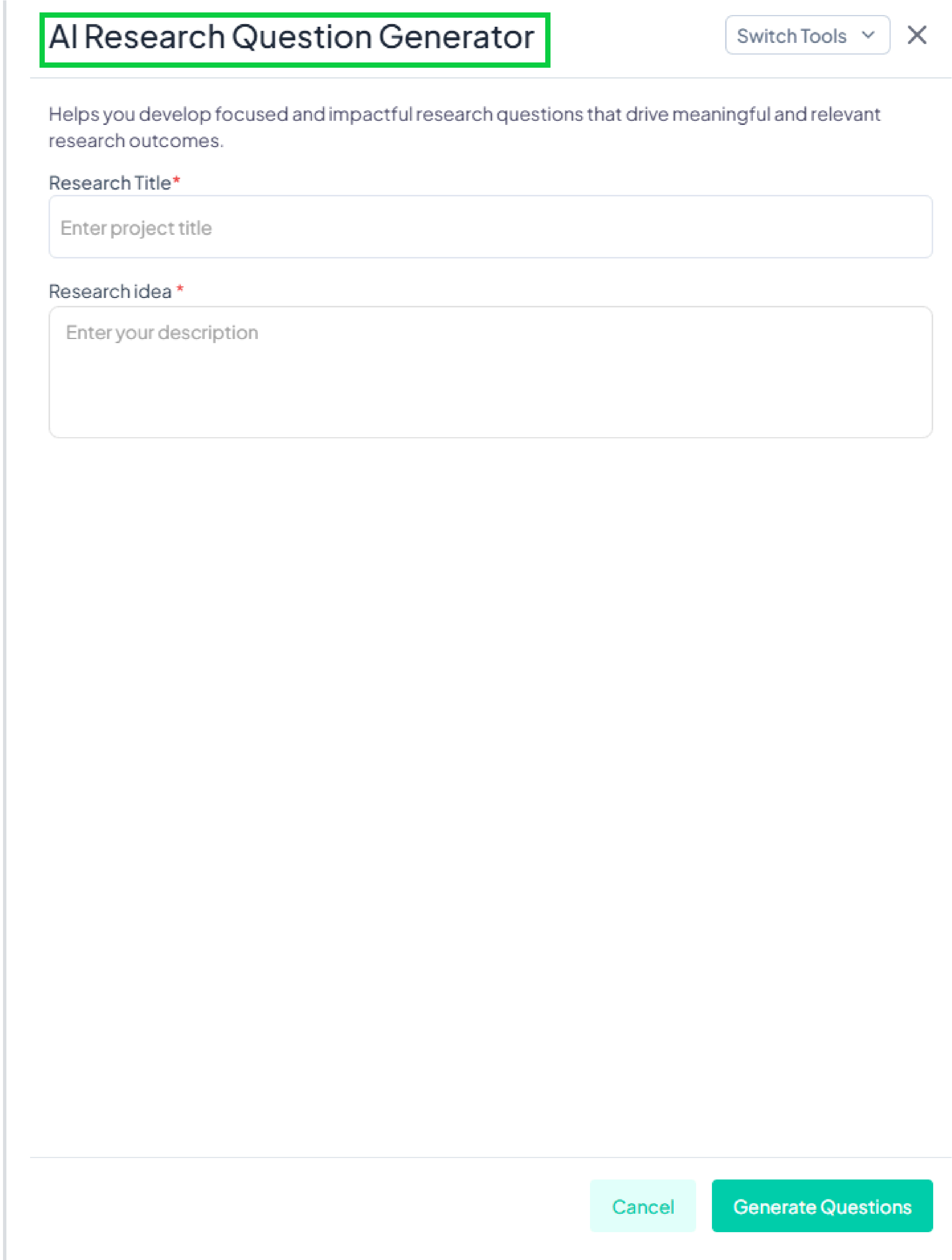
Purpose: Helps formulate clear, concise, and impactful research questions.

Input Fields:

- **Research Title** *(Required)*: State the title of your research.
- **Research Idea** *(Required)*: Provide a brief description of your idea.

Actions Buttons:

- `Generate Questions`: Outputs a list of relevant research questions.
- `Cancel`: Clears the form.


AI Research Question Generator
Switch Tools
Helps you develop focused and impactful research questions that drive meaningful and relevant research outcomes.
Research Title*
Enter project title
Research idea *
Enter your description
Cancel
Generate Questions

History and Document Management

The toolkit provides access to all previously generated content for quick reference and reuse.

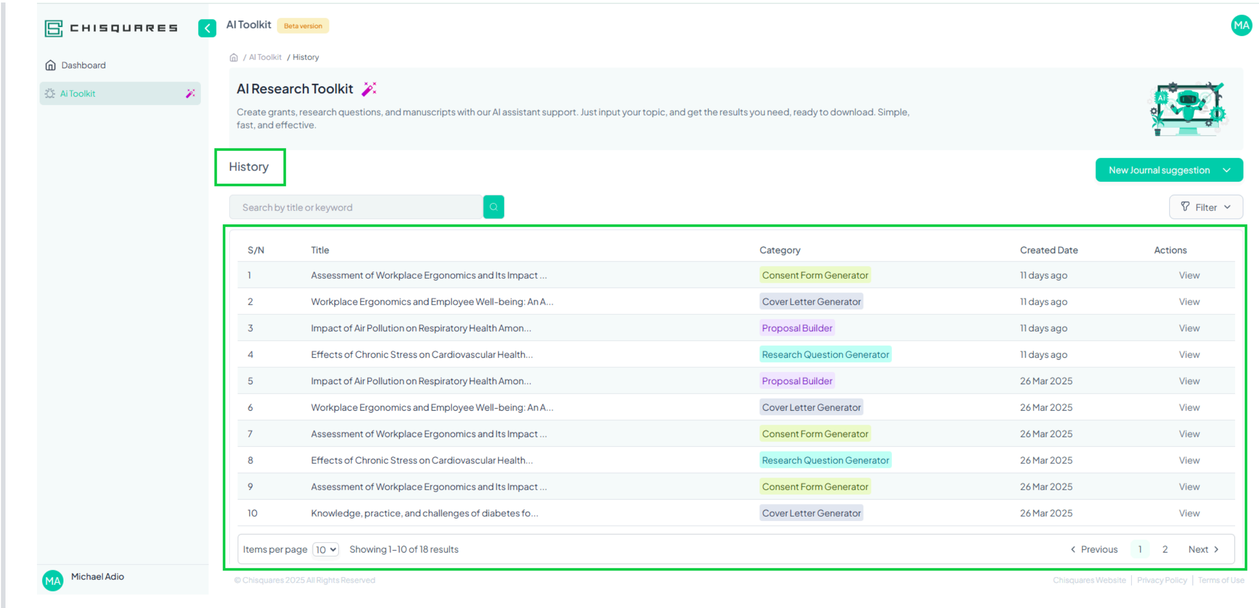
Viewing History:

- Click the **"History"** button to open a searchable and filterable list.
- Each entry includes:
  - **S/N** (Serial Number)
  - **Title**
  - **Category** (Proposal, Cover Letter, Consent, Questions)
  - **Created Date**
  - **Actions** (View)

Filter Options:

- **Search by Title or Keyword**
- **Filter by Tool** (Proposal Builder, Cover Letter Generator, Consent Form Generator, Research Questions Generator)
- **New Journal suggestion:** New Journal suggestion dropdown menu enable easy navigation back to any of the tools.

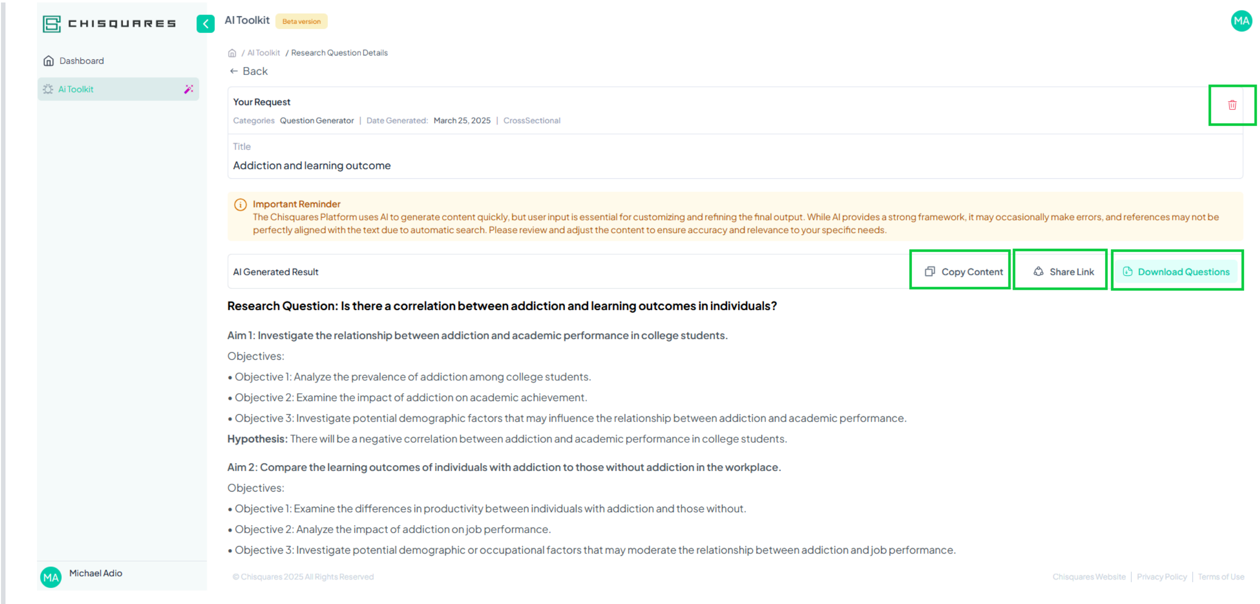
Sample Entries:



Output Management and Important Notice

Each generated output is accompanied by the following:

- **AI Generated Result**: The final draft created by the AI.
- **Delete Icon** Deletes the generated result
- **Copy Content**: Copies the text to clipboard.
- **Share Link**: Generates a Shareable URL.
- **Download [Document Type]**: Saves the file in a downloadable format.



Important Reminder:

> The Chisquares Platform uses AI to generate content quickly, but user input is essential for customizing and refining the final output. While AI provides a strong framework, it may occasionally make errors, and references may not be perfectly aligned with the text due to automatic search. Please review and adjust the content to ensure accuracy and relevance to your specific needs.

Important Notes

- While the toolkit uses AI to generate accurate and formatted content, **users must review and customize** the outputs to ensure relevance and correctness.
- Reference lists, if included, may not always align perfectly. Always verify sources before submission.
- Documents are intended as **first drafts** to speed up your writing process, not final submissions.

Frequently Asked Questions (FAQs)

Q: Can I use the AI output directly in my submission?
A: You should review and revise all AI-generated content for accuracy, tone, and alignment with your objectives.

Q: Can I exit the AI Toolkit module while content generation is in progress?
A: Yes, you can. Once content generation begins, it will continue running in the background. You can access the generated content anytime via the History tab, where all drafts are saved for review and editing.

Q: Is the content saved automatically?
A: Yes. Every generated file is saved to your account under History.

Support

For technical assistance, feature requests, or bug reports, contact our support team at **info@chisquares.com** or visit our help center.

Stay productive and elevate your research with the Chisquares AI Research Toolkit.

Getting Started / SURVEY BANK

The Survey Bank on the Chisquares platform provides users with access to a meticulously curated collection of survey questions designed to enhance your data collection efforts. This feature promotes knowledge sharing and collaboration by allowing users to contribute their unique survey questions to the database. With easy exploration and contribution capabilities, the Survey Bank is your go-to resource for efficient survey design and development.

Features

The Survey Bank offers two primary functionalities designed to streamline your survey creation process:

Explore

- Browse the extensive question bank to save time on survey development.
- Avoid duplicating questions by leveraging existing, validated options.
- Search and filter questions by categories, topics, or research objectives.

Contribute

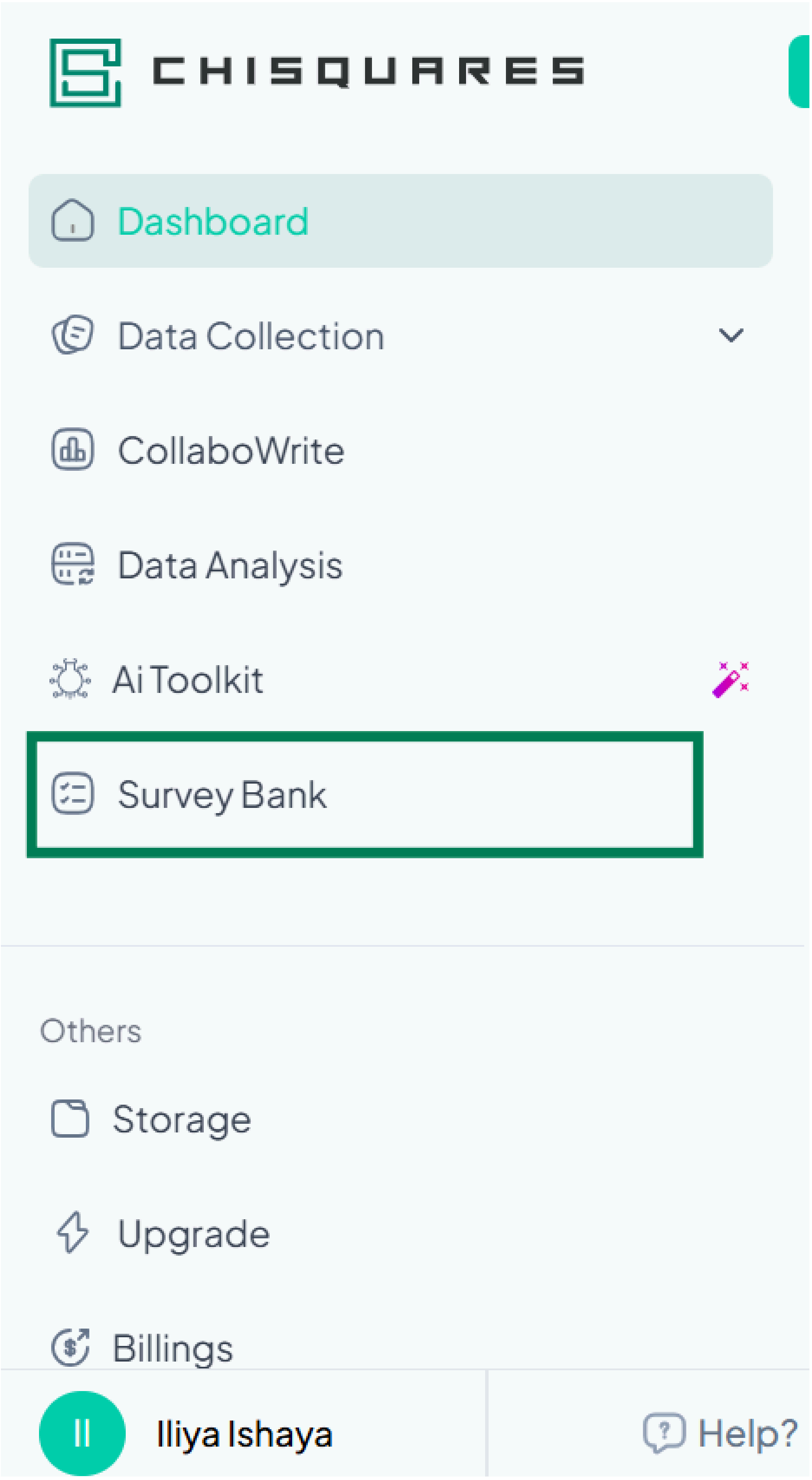
- Add your survey questions to enrich the public database.
- Support the generation and regeneration of knowledge within the research community.
- Ensure your contributions are credited and visible to other researchers on the platform.

Getting Started

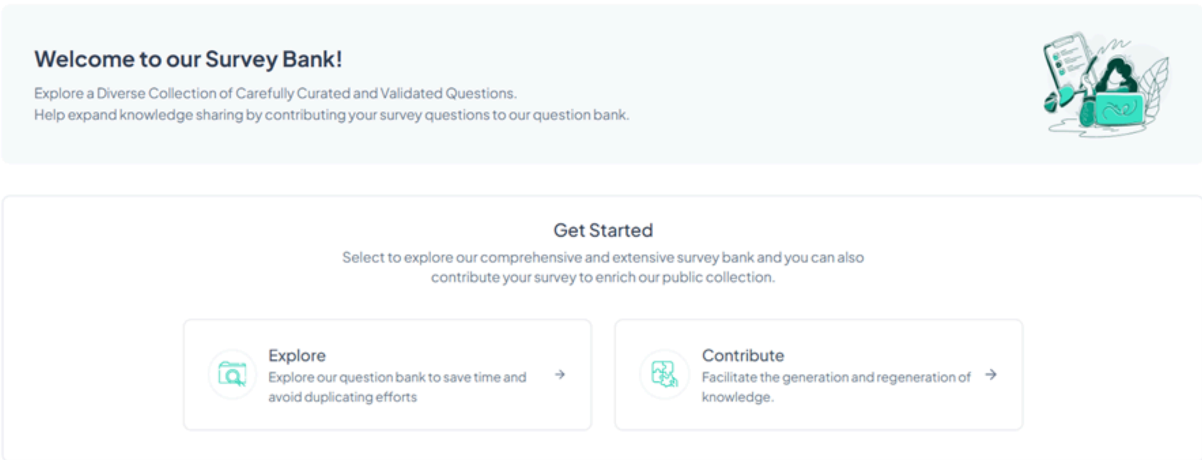
To use the Survey Bank effectively, follow these simple steps:

Accessing the Survey Bank

1. Log into your Chisquares account.
2. Navigate to the left-hand sidebar and select **More** from the navigation menu, if Survey Bank is not already pinned to the menu.
3. Click on **Survey Bank**


CHISQUARES
Dashboard
Data Collection
CollaboWrite
Data Analysis
Ai Toolkit
Survey Bank
Others
Storage
Upgrade
Billings
II
Iliya Ishaya
Help?

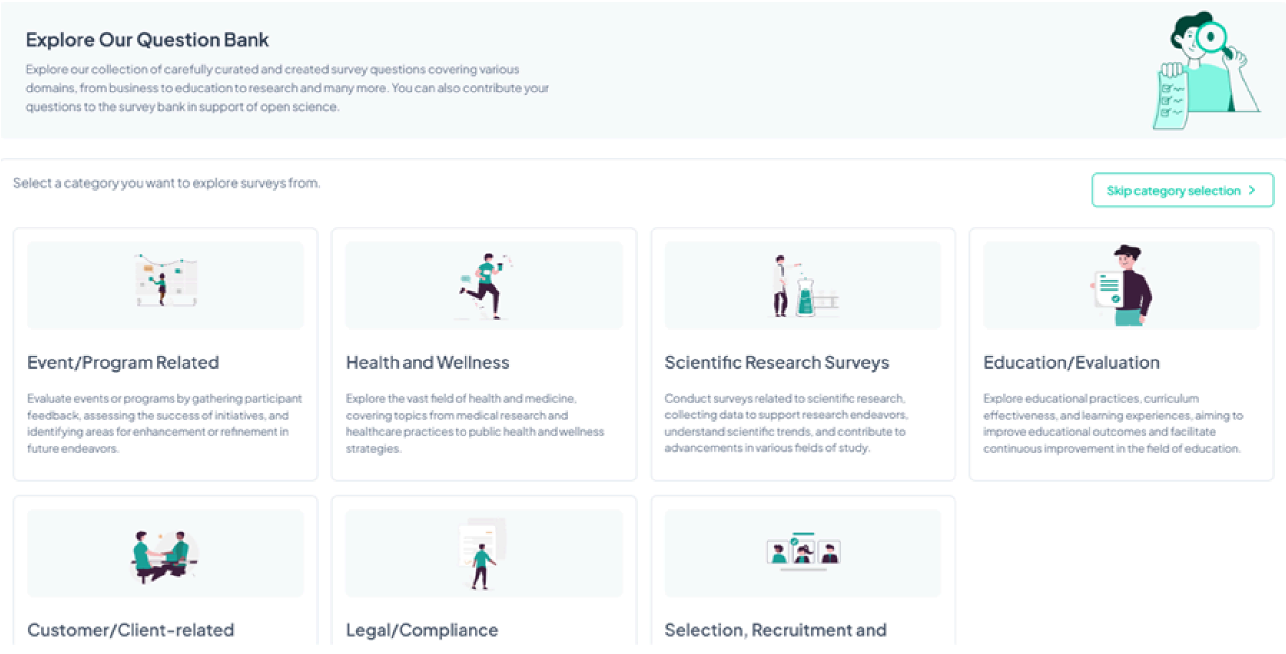
4. Once the Survey Bank interface loads, choose between the two options displayed under the Get Started section:
    - Explore: Browse and select questions from the database.
    - Contribute: Upload your survey questions for public sharing.



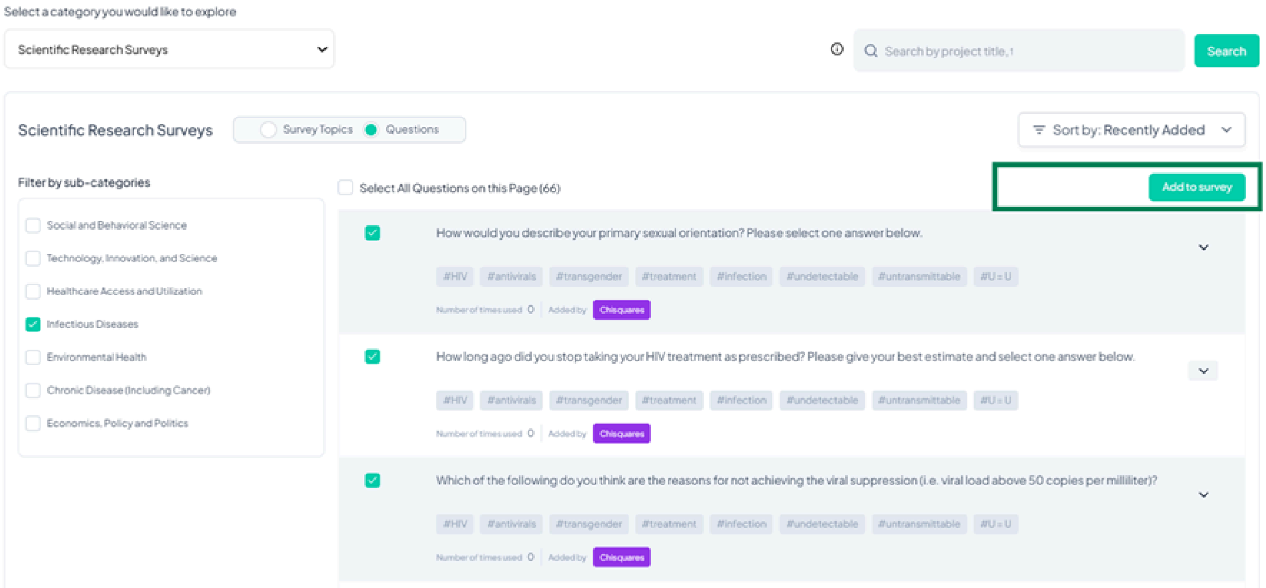
Exploring the Question Bank

1. Click the Explore icon.

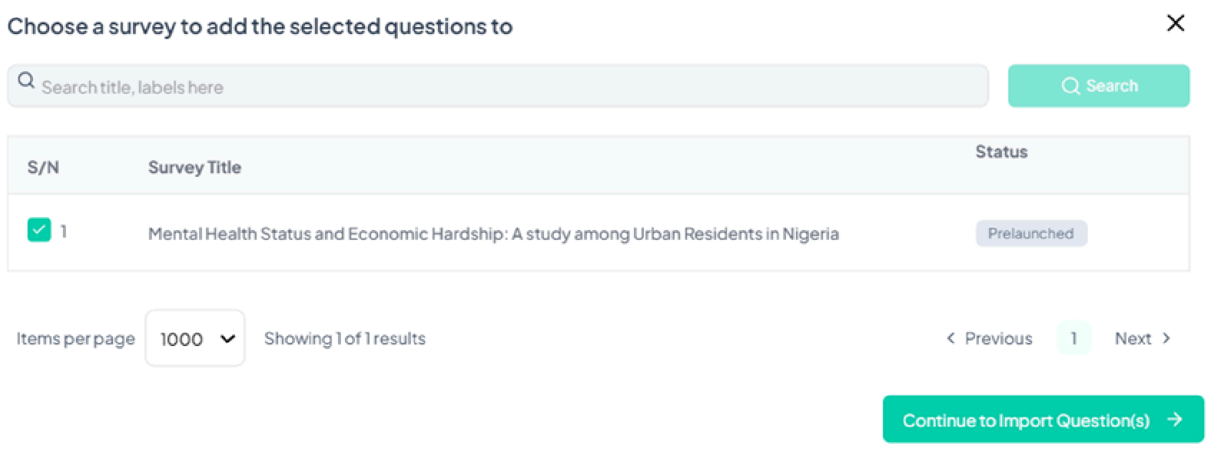
2. Select a category from which you desire to explore surveys (you can skip)



3. Preview selected questions, ensuring relevance to your survey project, and click on **Add to Survey**



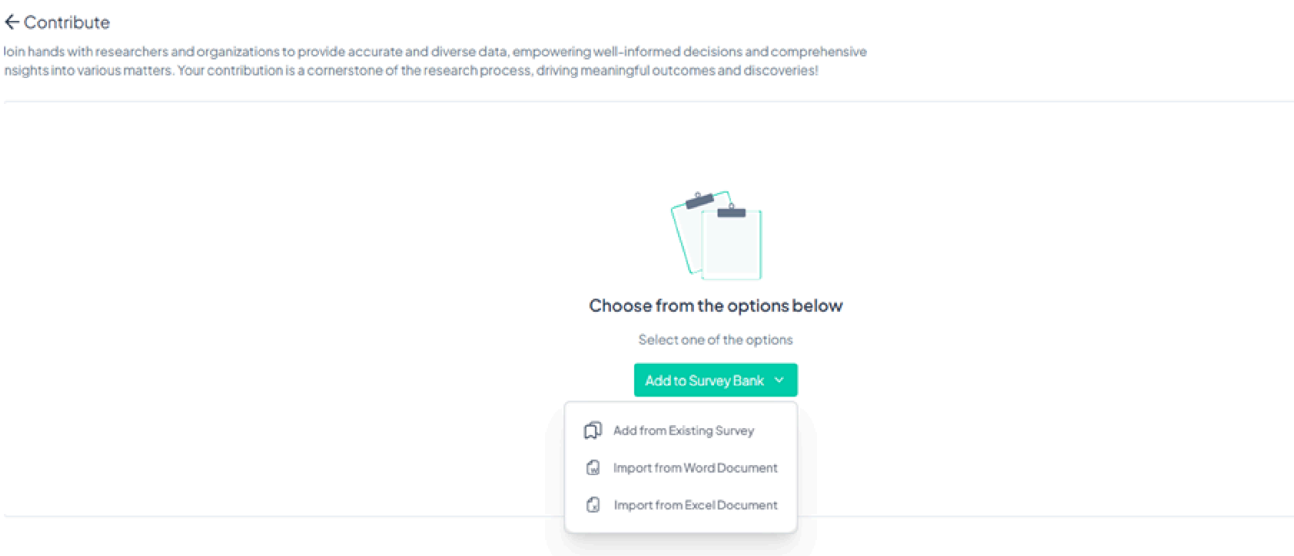
4. Choose a survey to add the selected questions to and click on **Continue to Import Question(s)**



Contributing to the Question Bank

1. Click the Contribute icon.

2. Click on **Add to Survey Bank**



3. Choose the source you are adding from.

4. Follow the instructions for each of the question sources to add questions to the survey bank.

Benefits

- Time-Saving: Quickly find pre-designed questions to enhance your surveys.
- Standardization: Use validated and expertly crafted survey content to maintain high research standards.
- Collaboration: Actively contribute to a growing knowledge pool that supports global research efforts.

Additional Information

- Data Privacy: Chisquares ensures that all publicly shared survey questions are anonymized to protect proprietary research and intellectual property.
- Approval Process: Contributed questions undergo a verification process to ensure quality and relevance.
- Support: For assistance or inquiries, click on the **Help?** button at the bottom-left of the navigation bar or contact Chisquares support.

Conclusion

The Survey Bank is designed to be an essential tool for researchers and survey designers. By providing a platform for exploration and contribution, Chisquares enables users to efficiently create high-quality surveys while promoting collaboration and innovation in research design. Dive into the Survey Bank today and unlock new possibilities for your projects!

Getting Started / STORAGE

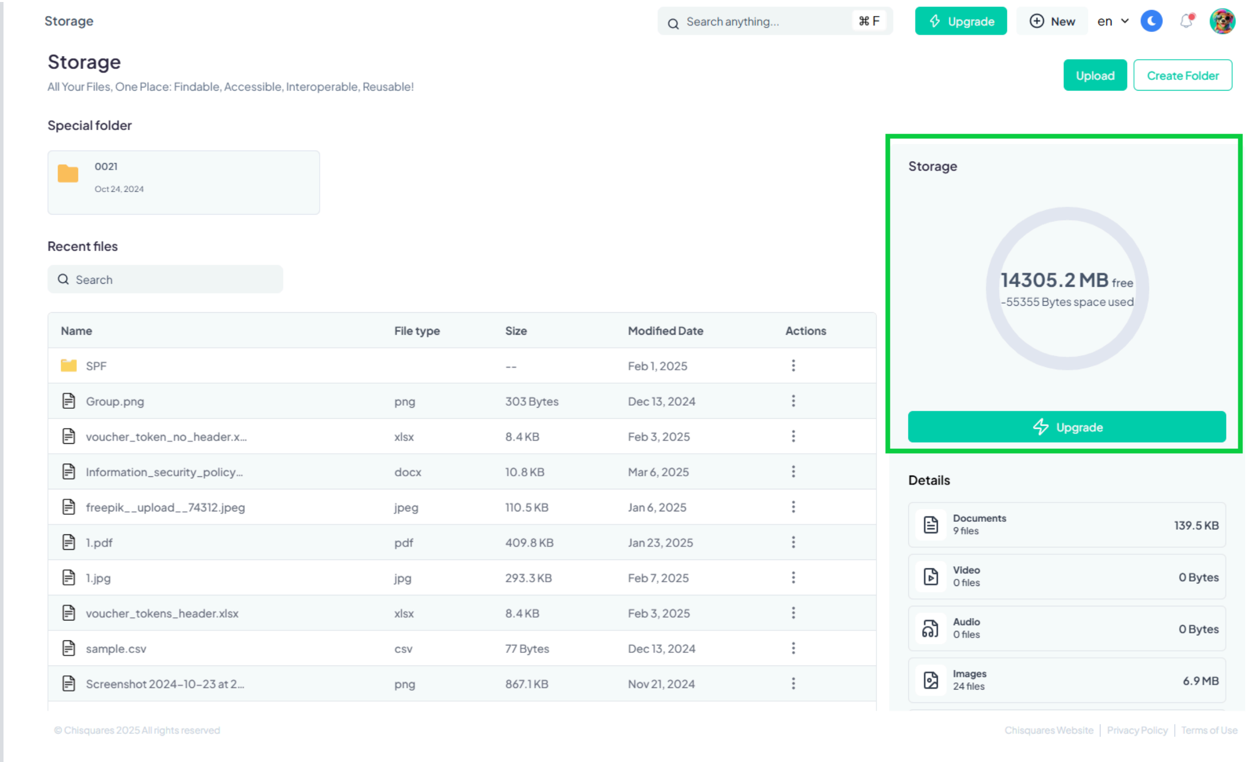
Overview

The Storage System provides a seamless way to manage and organize files efficiently. Users can upload, store, and access their files from different locations. This manual will guide you through the functionalities and features available within the storage system.

Accessing the Billing Section

- Log in to your Chisquares account.
- Navigate to the Storage tab in your dashboard.
    - Full View Mode: The Storage option is located in the left pane under the "Others" section.
    - Collapsed Menu Mode: Click on the Storage icon (□) to access the Storage.

User Interface Overview



The storage interface is divided into several key sections:

- Special Folder: A designated space for important files.
- Recent Files: Displays the latest files uploaded or modified.
- Storage Usage: Shows available storage and used space.
- File Details: Categorizes files by type and size.
- Action Buttons: Upload files and create folders.

Functionalities and Features

Uploading Files

Users can upload files into the storage system by clicking the Upload button. Upon clicking, the following interface is displayed:

Steps to Upload a File:

1. Click the Upload button.

2. A prompt appears with the option to drop files, browse files, or import from:

- My Device
- Dropbox
- Google Drive
- Link

3. Select a file and upload it.

Note: Only one file can be uploaded at a time.

Managing Storage

Under the My Storage tab, users can view and manage files. The displayed interface is:

Actions in My Storage:

- View Recent Files: Lists recently modified or uploaded files.
- Delete or Move Files: Available in the action menu for each file.
- Search Files: Use the search bar to find specific files quickly.

4.3 Creating a Folder

Users can create folders to organize files efficiently. Clicking the Create Folder button brings up the following prompt:

Steps to Create a Folder:

1. Click the Create Folder button.
2. Enter a folder name.
3. Click Save Changes to finalize or Cancel to discard.

Storage Details & Management

Users can track storage usage through the Storage section. This includes:

- Documents: Number of document files and total size.
- Images: Number of image files and total size.
- Videos & Audio: Number of media files and total size.
- Others: Any other file types stored.

Storage Upgrade

If additional space is required, users can click the Upgrade button to purchase more storage or explore alternative options.

Summary of Action Buttons

Button	Functionality
Upload	Uploads a single file to storage
Create Folder	Creates a new folder
Upgrade	Expands storage capacity
Cancel	Cancels an ongoing action
Save Changes	Saves the created folder

This manual provides a structured approach to using the Storage System effectively. For additional support, visit the Help Center or contact technical support.

Getting Started / Upgrade

Chisquares offers flexible subscription plans to suit different user needs, ranging from individual researchers to large organizations. This guide provides a step-by-step process for selecting and upgrading a subscription plan.

Accessing the Upgrade Section

1. Log in to your Chisquares account.

2. Navigate to the Upgrade tab in your dashboard.

- (Full View Mode: The Upgrade option is located on the left pane under the "Others" section.

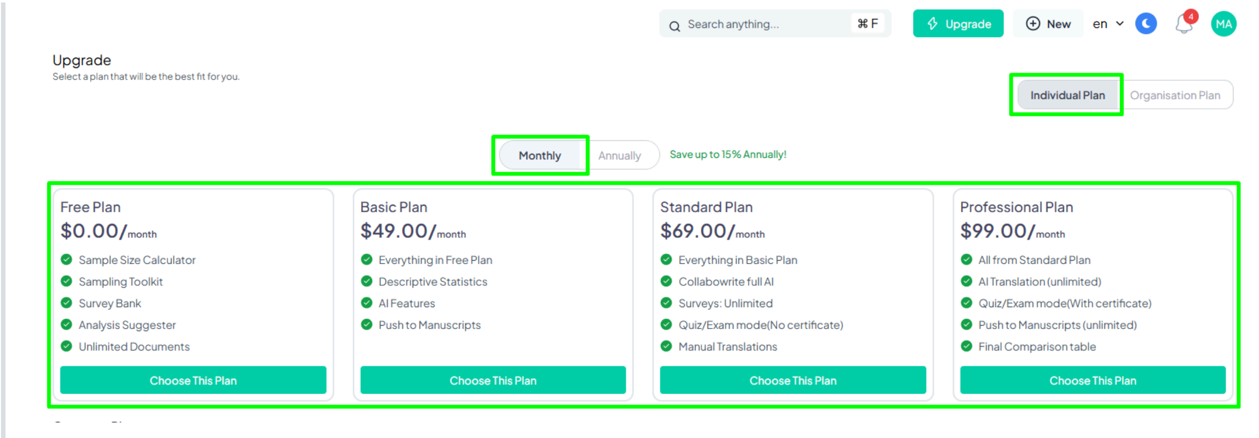
- Collapsed Menu Mode: Click on the Upgrade icon (⚡) to access the Upgrade.)

Individual Subscription Plans

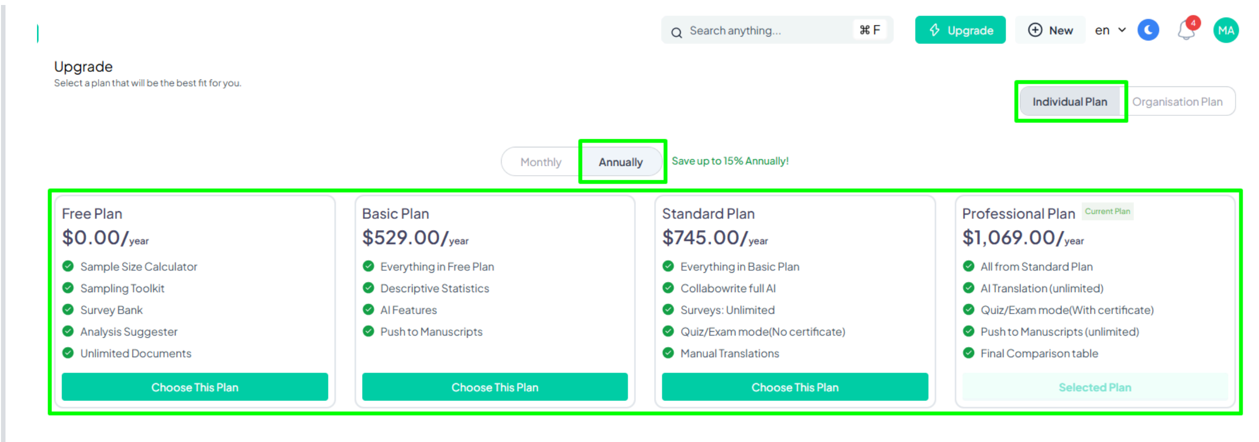
Chisquares offers four individual plans, available on a monthly or annual basis. Users can save up to 15% by choosing an annual subscription.

Plan Options

Monthly Individual Plan



Yearly Individual Plan



How to Upgrade

1. Navigate to the Plan Upgrade section on your Chisquares dashboard.
2. Select the Individual Plan option.
3. Choose a monthly or annual subscription.
4. Click “Compare Plans” to review features.
5. Click “Choose This Plan” under your preferred option.
6. Complete the payment process.

7. Your plan will be updated immediately upon successful payment.

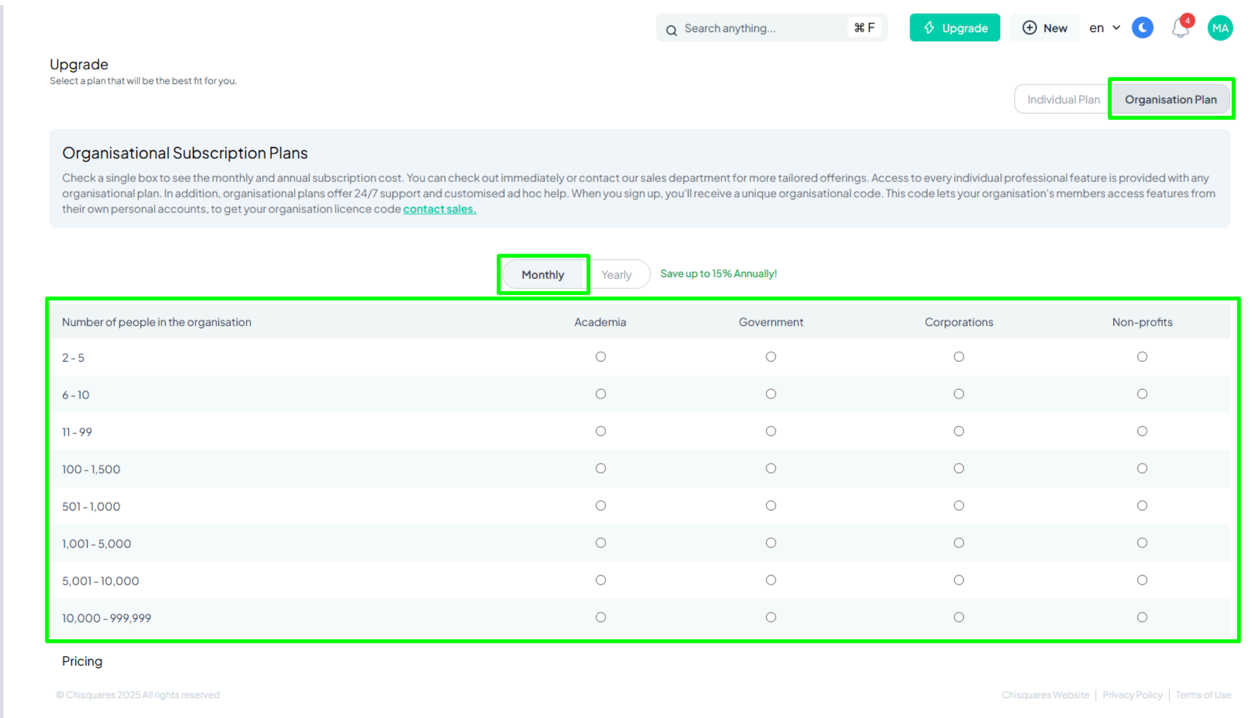
Organizational Subscription Plans

For teams and institutions, Chisquares offers Organizational Plans with additional benefits such as 24/7 support and customized ad hoc assistance. Members receive a unique Organizational License Code, allowing them to access premium features from their individual accounts.

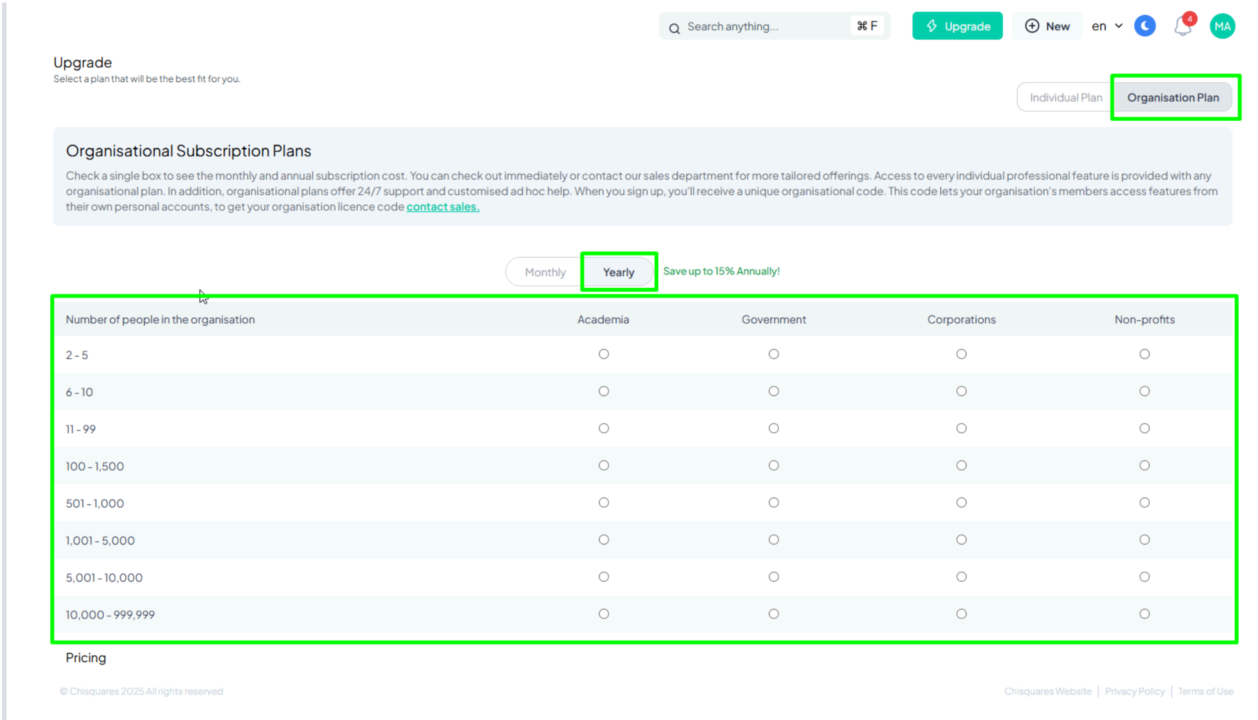
Organizational Plan Pricing

Plan Options

Monthly Organization Plan



Yearly Organization Plan

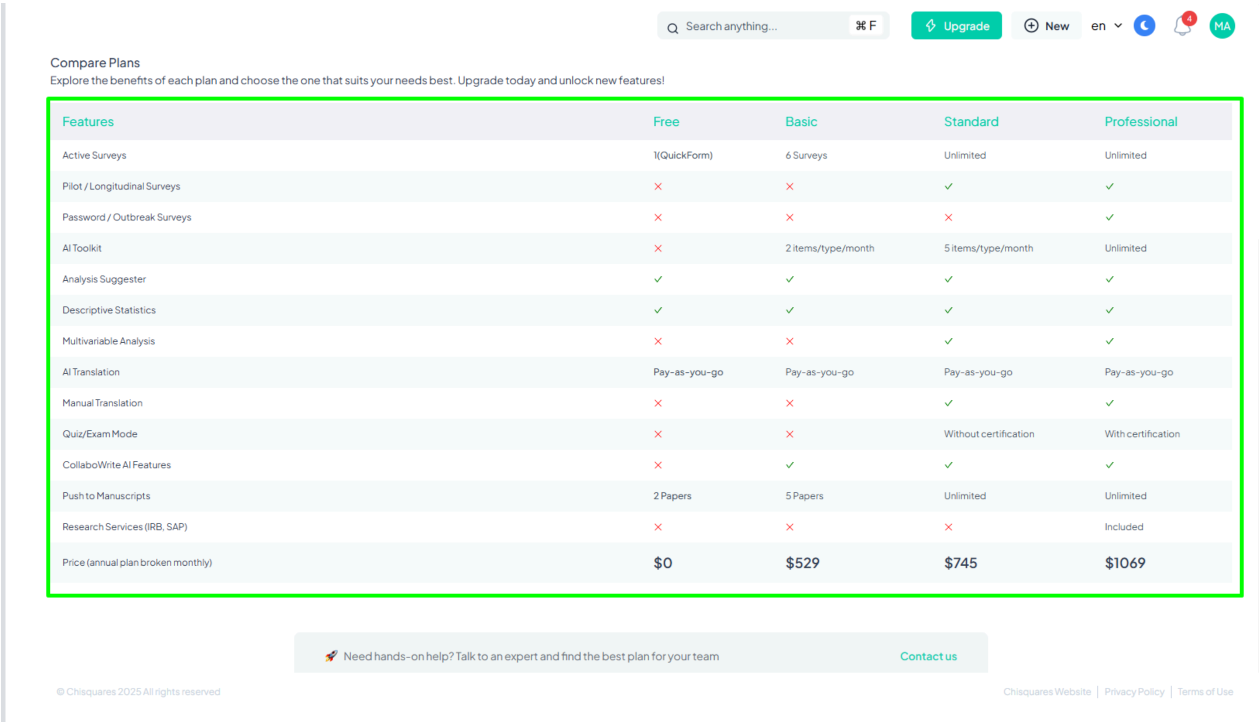


4.2 How to Subscribe to an Organizational Plan

1. Navigate to the Plan Upgrade section.
2. Select Organizational Subscription Plans.
3. Choose a monthly or annual billing cycle.
4. Select the number of users in your organization.
5. Click “Contact Sales” to receive a custom quote.
6. After purchase, receive an Organizational License Code.
7. Distribute the code to your team for premium feature access.

5. Compare Plans

Easily explore the benefits of each plan and choose the one that suits your needs best.



Features	Free	Basic	Standard	Professional
Active Surveys	1(QuickForm)	6 Surveys	Unlimited	Unlimited
Pilot / Longitudinal Surveys	✗	✗	✓	✓
Password / Outbreak Surveys	✗	✗	✗	✓
AI Toolkit	✗	2 items/type/month	5 items/type/month	Unlimited
Analysis Suggester	✓	✓	✓	✓
Descriptive Statistics	✓	✓	✓	✓
Multivariable Analysis	✗	✗	✓	✓
AI Translation	Pay-as-you-go	Pay-as-you-go	Pay-as-you-go	Pay-as-you-go
Manual Translation	✗	✗	✓	✓
Quiz/Exam Mode	✗	✗	Without certification	With certification
CollaboWrite AI Features	✗	✓	✓	✓
Push to Manuscripts	2 Papers	5 Papers	Unlimited	Unlimited
Research Services (IRB, SAP)	✗	✗	✗	Included
Price (annual plan broken monthly)	$0	$529	$745	$1069

6. Need Assistance?

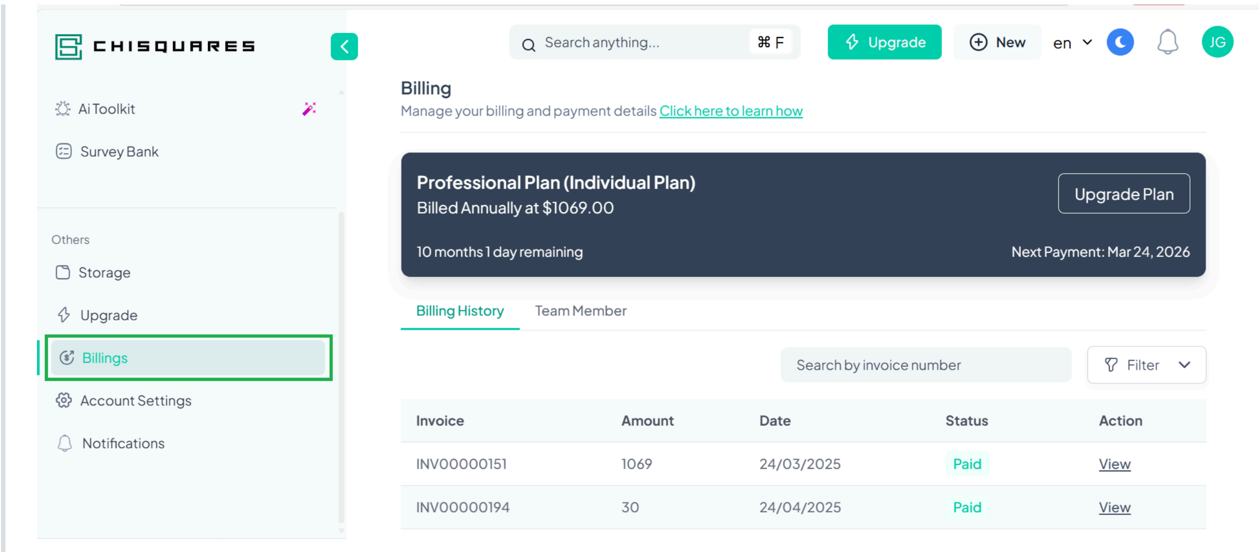
For hands-on support in choosing the right plan, contact our Customer Support Team:

- Website: Chisquares.com
- Email: support@chisquares.com

Upgrade today and unlock powerful features to enhance your research!

Getting Started / Billing

The Billing section on the Chisquares platform allows users to manage their payment details, view invoices, and handle team member billing permissions. This guide provides a step-by-step walkthrough of the billing interface and its functionalities.



Accessing the Billing Section

1. Log in to your Chisquares account.

2. Navigate to the Billing tab in your dashboard.

- (Full View Mode: The Billing option is located on the left pane under the "Others" section.

- Collapsed Menu Mode: Click on the Billing icon (□) to access the Billing.)

4. You will see two main sections:

- Billing History (default view)
- Team Member Management

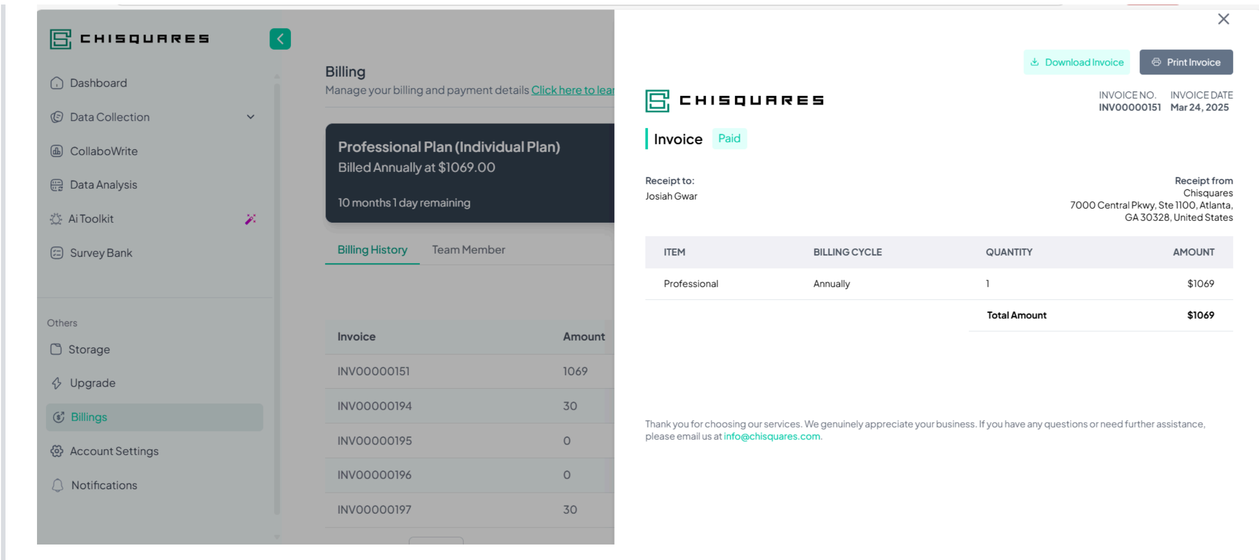
Subscription Details

- Current Plan: Professional Plan (Organizational Plan)
- Billing Cycle: Annually at $324,000.00
- Subscription Status: Active
- Time Remaining: 11 months 29 days
- Next Payment Date: January 27, 2026

Billing History

The Billing History tab provides a record of all invoices.

Viewing Invoices



1. Locate an invoice from the list.
2. Click View under the Action column.
3. The invoice will display the following details:

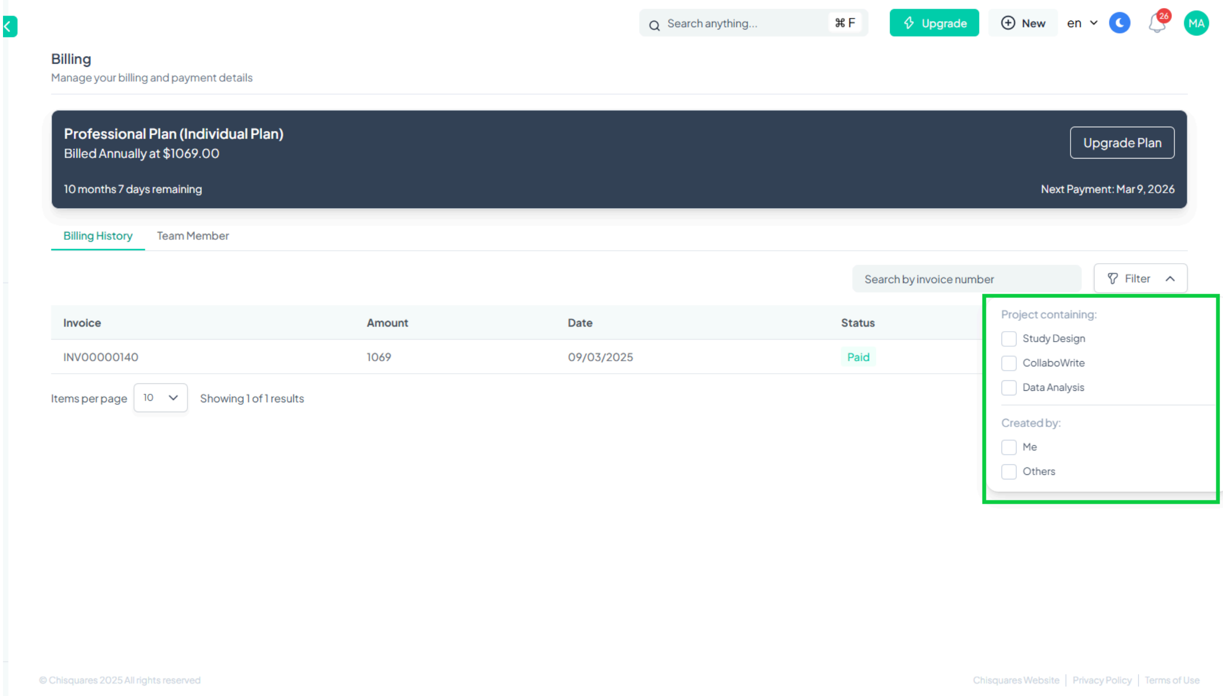
- Invoice Number
- Invoice Date
- Billing Status (Paid/Unpaid)
- Receipt to (Customer Name)
- Receipt from (Chisquares)
- Itemized List of Services
- Total Amount Due

Downloading or Printing an Invoice

1. After opening an invoice, you have the option to:

- Click Download Invoice to save a copy.
- Click Print Invoice to print a physical copy.

Filtering Invoices



> Users can filter invoices using the Filter button.

1. Click Filter.
2. Select a category:

- Project Containing:
  - Study Design
  - CollaboWrite
  - Data Analysis

- Created by:
  - Me
  - Others

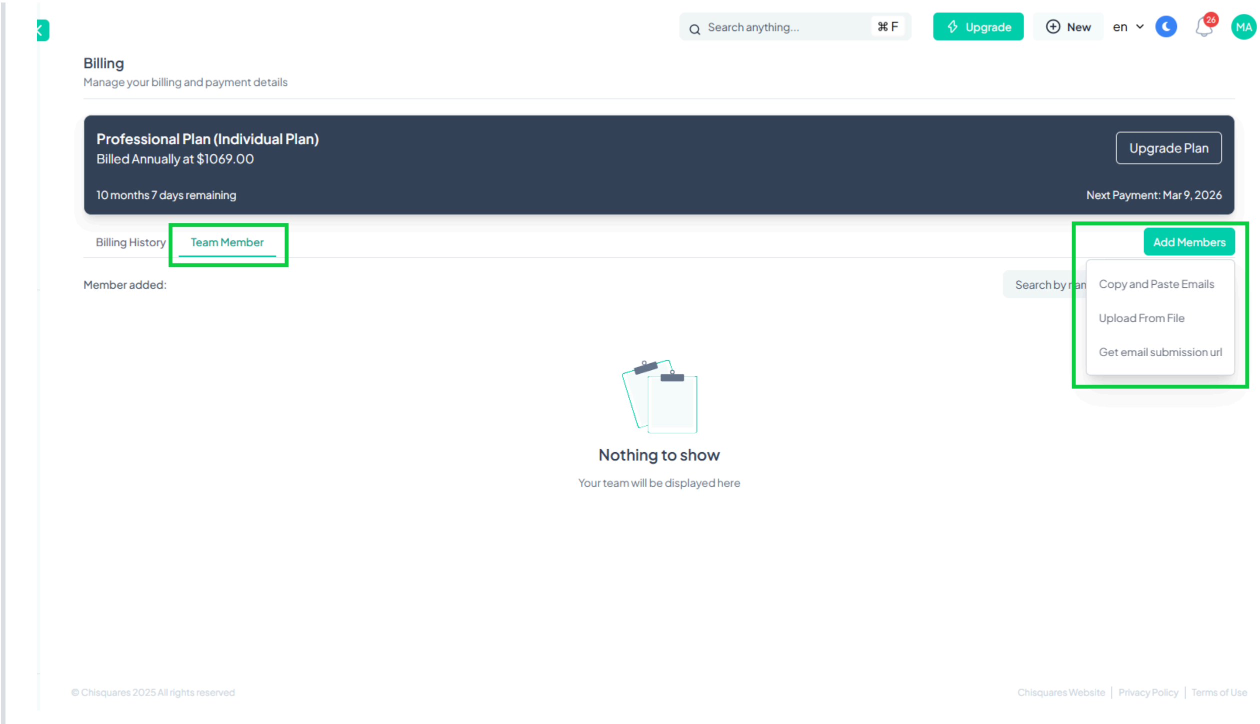
3. View the filtered results.

Searching for an Invoice

1. Use the Search by Invoice Number bar.
2. Enter an invoice number (e.g., INV00000007).
3. Press Enter to display results.

Team Member Management

The Team Member tab allows administrators to manage billing permissions for team members.



Adding a Team Member

1. Click Add Members.

2. Select an option from the dropdown list:

- Copy and Paste Emails (Manually enter emails)

- Upload From File (Upload a CSV or text file with email addresses)

- Get Email Submission URL (Share a link for team members to join)

4. Once added, the team member list will display the added users.

Searching for a Team Member

1. Use the Search by Name or Email bar.

2. Enter a team member's name or email.
3. Press Enter to locate the member.

Need Assistance?

For any billing-related inquiries, contact Chisquares Support:

- Email: info@chisquares.com

Getting Started / Account Settings

Overview

The Account Settings section in Chisquares allows users to manage their profile information, security settings, and email preferences. This guide provides a step-by-step overview of how to navigate and update account settings efficiently.

Accessing Account Settings

- Full View Mode: The Account Settings option is located in the left pane under the "Others" section.
- Collapsed Menu Mode: Click on the Settings icon (⚙) to access the account settings.

Account Settings Tabs

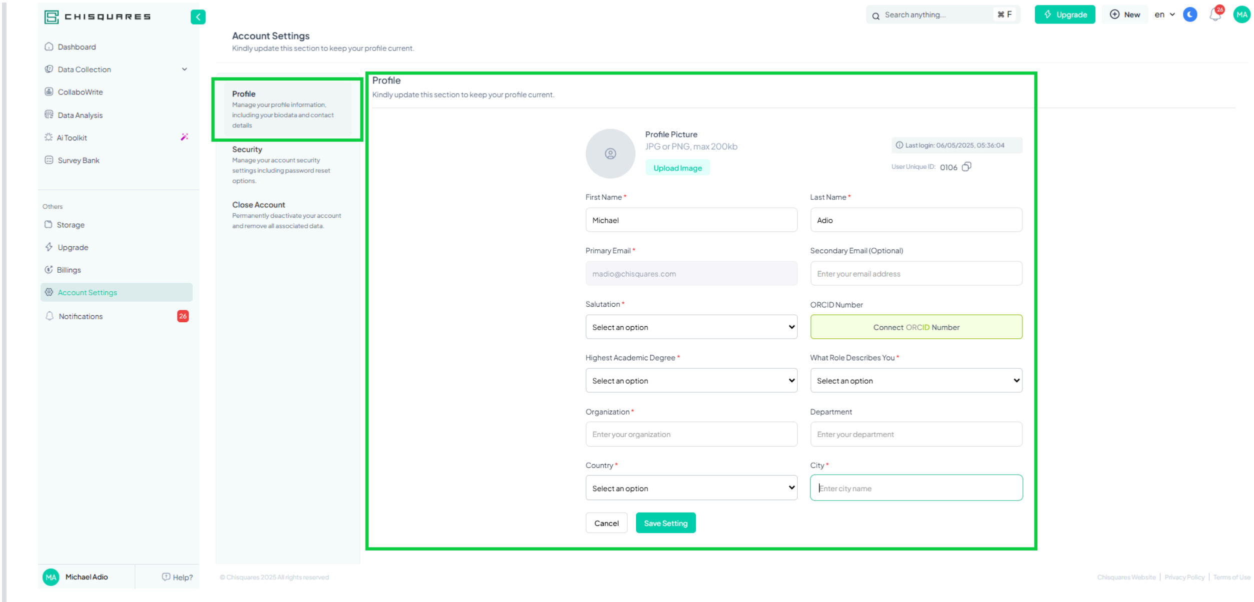
The Account Settings section is divided into three main tabs:

Profile Tab

The Profile tab allows users to update their profile information to keep their details current. Key information displayed includes:

- Last Login Timestamp (e.g., 01/02/2025, 01:35:54)
- Unique User ID (e.g., 0090)

Updating Your Profile



To update your profile, follow these steps:

1. Upload a Profile Picture

- Accepted formats: JPG or PNG
- Maximum size: 200 KB

3. Edit the Following Fields:

- First Name (e.g., John)
- Last Name (e.g., Doe)
- Primary Email (e.g., johndoe@gmail.com)
- Secondary Email (Optional) (e.g., j.doeofficial@gmail.com)
- Salutation (Select from the dropdown menu)
- ORCID Number (Click on "Connect ORCID Number" to add or create a new one)

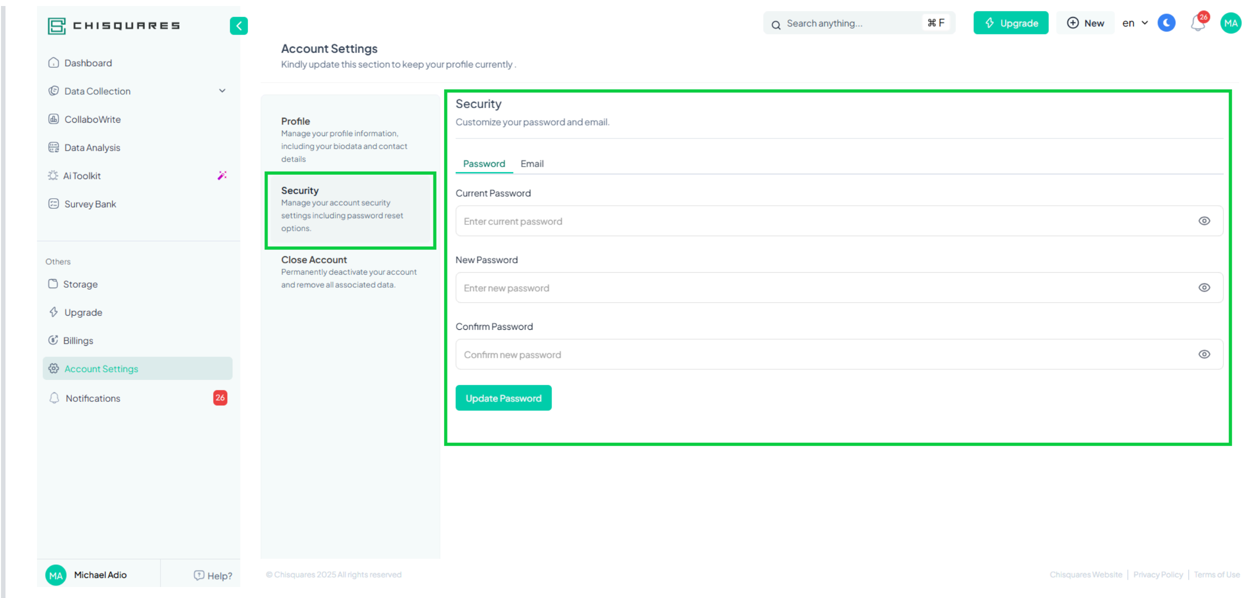
- Highest Academic Degree (Select from the dropdown menu)
- Role Description (Choose the most relevant role from the dropdown menu)
- Organization (Enter your organization’s name)
- Department (Enter your department’s name)
- Country (Select from the dropdown list)
- City (Enter your city)

5. Click “Cancel” to discard changes or “Save Settings” to update your profile.

Security Tab

The Security tab allows users to manage account security by updating passwords and email addresses.

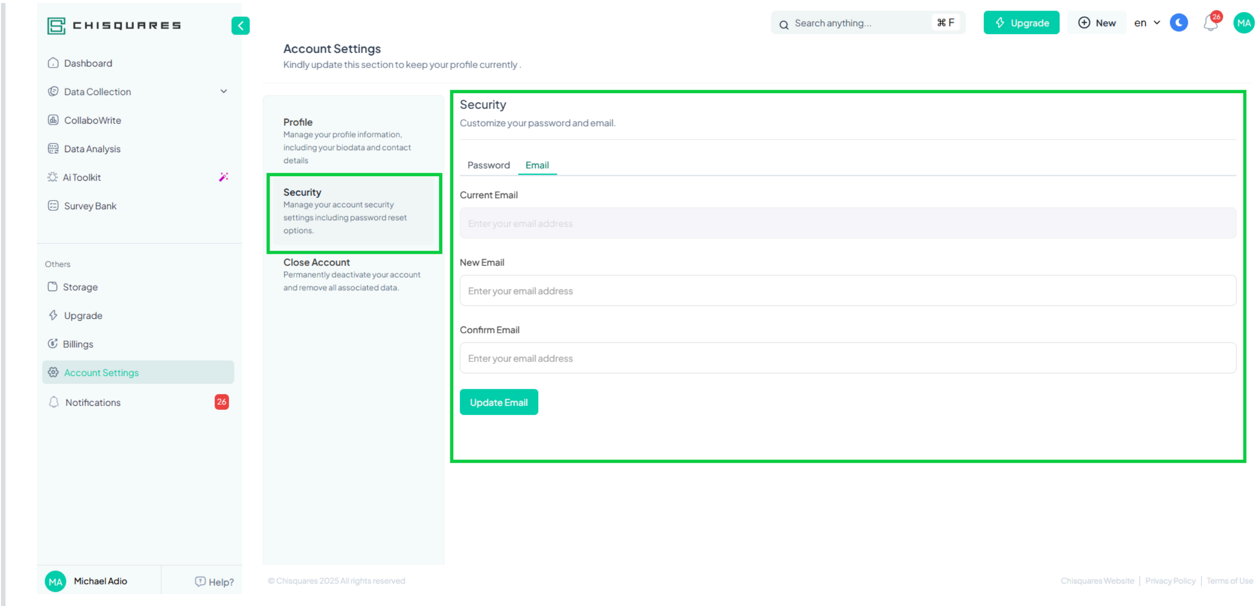
Updating Your Password



To change your password:

1. Click on the Password section.
2. Enter your current password.
3. Enter your new password in the designated field.
4. Re-enter the new password in the "Confirm Password" field for verification.
5. Click “Update Password” to save your changes.

Updating Your Email Address



To change your email address:

1. Click on the Email section.
2. Enter your current email address.
3. Enter your new email address in the designated field.
4. Re-enter the new email address in the "Confirm Email" field for verification.

5. Click “Update Email” to save your changes.

Close Account

The Close Account tab enables users to permanently delete their Chisquares account along with all associated data. Once the account is closed, access to all linked products and services will be lost. This action is irreversible.

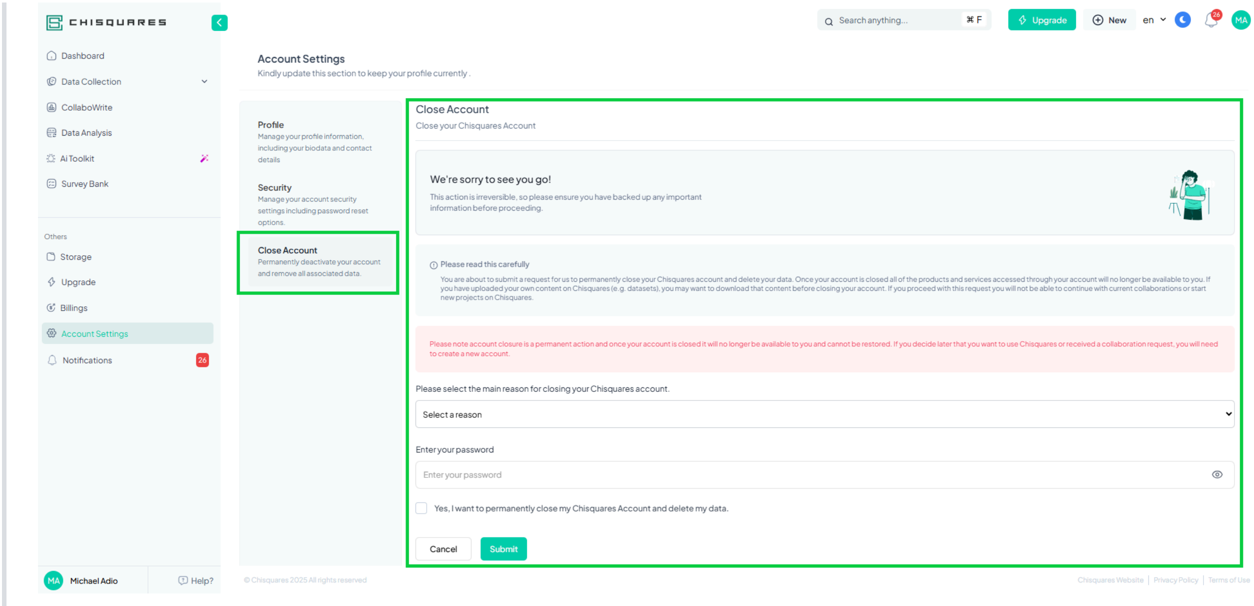
What Happens When You Close Your Account?

- Loss of Access: You will no longer be able to use Chisquares or retrieve your data.
- Deleted Content: All uploaded content, including datasets, will be permanently removed.
- End of Collaborations: Any ongoing collaborations will be terminated.
- No Restoration: Once deleted, the account cannot be recovered. A new account must be created if you wish to use Chisquares again.

Precautions Before Closing Your Account:

- Backup Important Data: Download any datasets or content you wish to keep.
- Notify Collaborators: If part of an ongoing project, inform team members before proceeding.
- Understand the Permanent Action: Deletion is irreversible.

Steps to Close Your Account:



1. Select a reason for closing your account from the dropdown menu.

2. Enter your password to confirm your identity.

3. Check the box confirming that you understand the action is irreversible.

4. Click Submit Request to permanently close your account.

5. If you change your mind, click Cancel before submitting.

Once submitted, your Chisquares account and data will be permanently deleted.

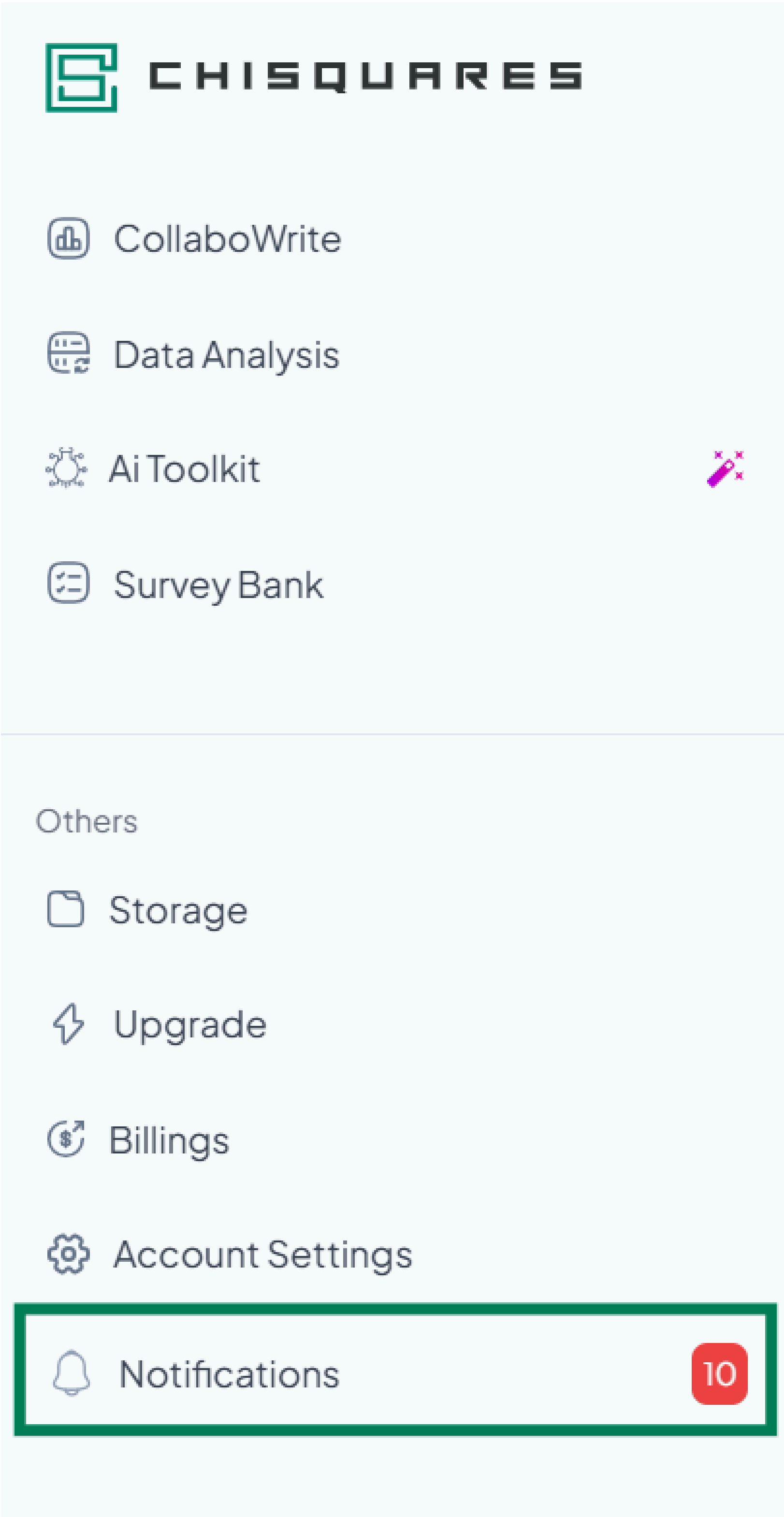
Getting Started / Notifications

The Notifications feature on the Chisquares platform helps users stay informed about account activities, project updates, billing confirmations, and survey changes. This centralized notification system ensures that users never miss important updates or system alerts.

🔔 Accessing Notifications

Navigation Path:

1. Log in to your **Chisquares** account.
2. On the **left sidebar**, under **Others**, click on **Notifications**.
3. Alternatively, click the **bell icon** at the top-right corner (with a red badge displaying the number of unread notifications).


CHISQUARES
CollaboWrite
Data Analysis
Ai Toolkit
Survey Bank
Others
Storage
Upgrade
Billings
Account Settings
Notifications
10

□ Notification Layout

Each notification entry includes the following elements:

Element	Description
Icon	Represents the type of notification (e.g., stopwatch for survey actions, card for billing).
Title	A short label for the notification (e.g., "Survey Settings", "Payment Processing").
Message Body	A concise message with key details, such as project titles, actions taken, or renewal dates.
Timestamp	Exact date and time the notification was received.?
Delete Icon (□)	Allows users to delete individual notifications permanently.

□ Types of Notifications

Chisquares generates different types of notifications, including:

Account Creation
Title: Account Creation
Message: Confirms successful creation of a new user account and prompts users to begin creating surveys.
Example:
Welcome to Chisquares! Your account setup is complete. Start creating surveys today!

Account Verification

Title: Email Verified

Message: Confirms successful verification of the user’s email address.

Example:

Email Update: Your email address for Chisquares has been verified.

Billing and Subscription

Title: Payment Processing, Subscription Renewals

Message: Includes details about recent transactions and upcoming subscription renewals.

Example:

Subscription Renewal: Your Chisquares subscription will renew on 03/24/2025 18:24:05.

Survey Launch

Title: Survey Launched

Message: Notifies users when a survey has been successfully launched and provides the official start date for data collection.

Example:

Congratulations! Your survey titled Prevalence of Infections in a Clinic, has been launched and will open for data collection on Wednesday, 15 January 2025.

Survey Lifecycle

Title: Survey launched, Survey closed out

Message: Notifies users when a survey is launched or successfully closed.

Example:

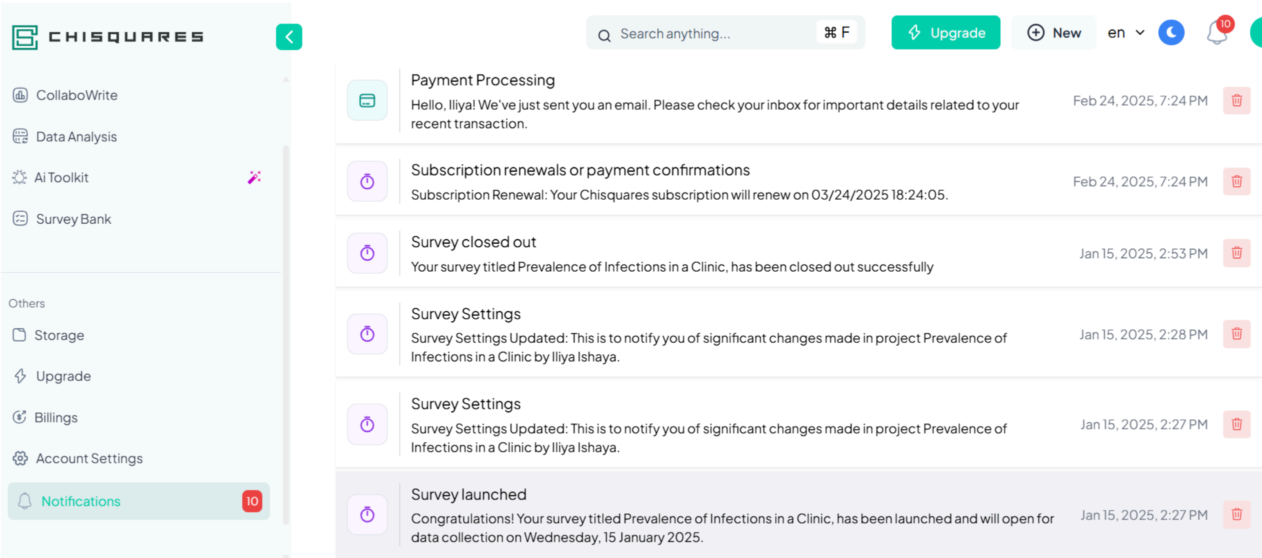
Your survey titled Prevalence of Infections in a Clinic, has been closed out successfully.

Project/Survey Settings

Title: Survey Settings

Message: Alerts users to significant changes made to survey settings by the project owner.

Example:
Survey Settings Updated: This is to notify you of significant changes made in project Prevalence of Infections in a Clinic by Iliya Ishaya.



▯ Deleting Notifications

To delete a notification:

1. Click the **red trash icon** (▯) on the right side of the notification.
2. The notification will be immediately removed from your list.
   ⚠ **Note:** Deleted notifications cannot be recovered.

▯ Real-Time Updates

Notifications are updated in real-time, ensuring you're instantly aware of:

- Project changes
- Survey status
- Billing confirmations
- System alerts

􀀀 Notification Counter

- The red badge on the bell icon displays the number of unread notifications.
- This counter updates automatically as new notifications arrive or are marked as read.

􀀀 User Context

- All notifications are **user-specific**. For example, notifications are addressed to **Iliya Ishaya** in the screenshot, reflecting personalization based on account activity.

􀀀 Need Help?

For any issues related to notifications:

- Click the **“Help?”** button at the bottom-left of the sidebar.
- Visit the **Support Assistance (Quick Question Bot).**

Getting Started / Help?

The **Help** section on the Chisquares platform provides immediate access to various support resources. Two of the most essential tools available here are:

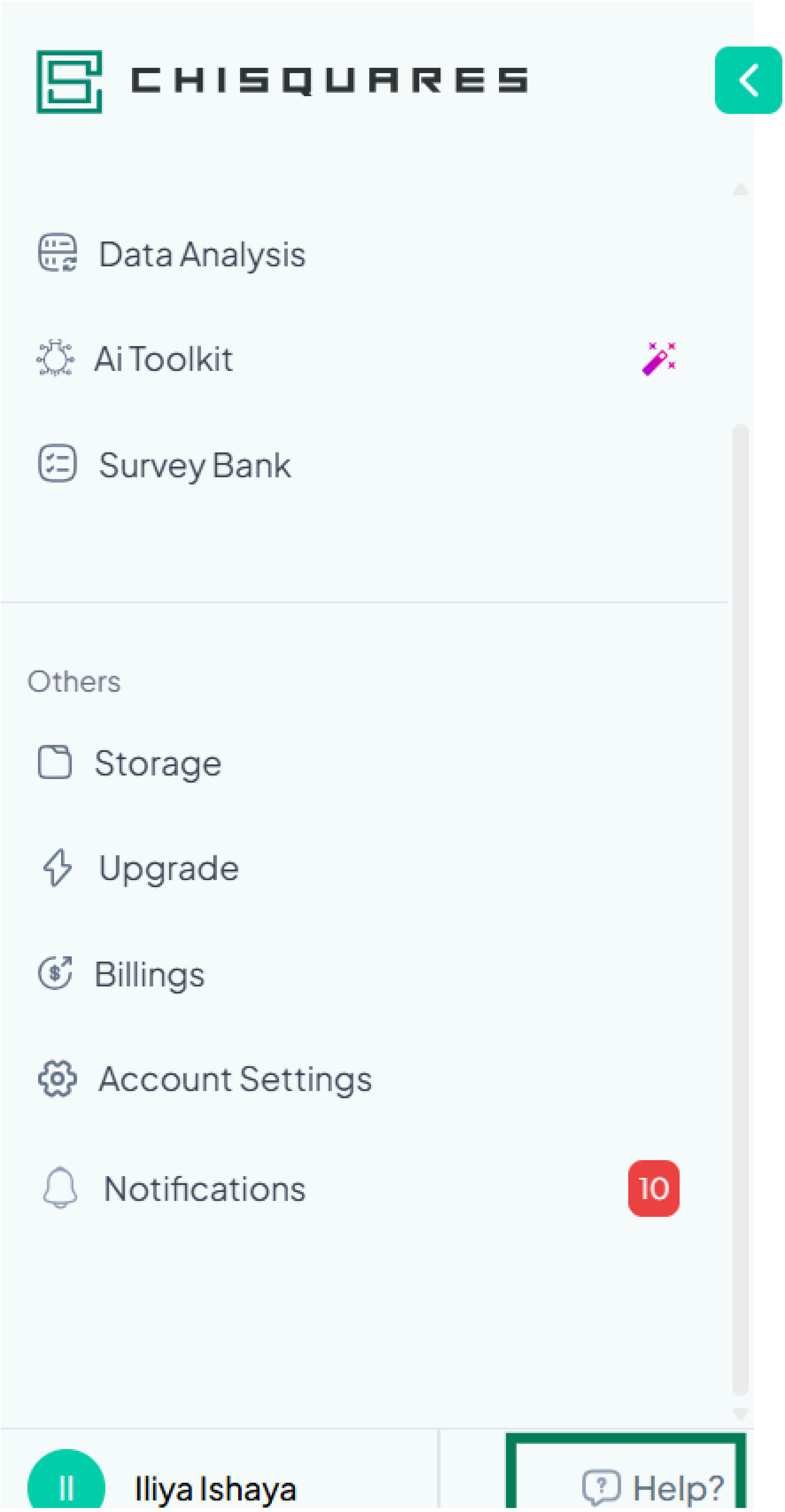
- **Report an Issue**
- **Support Assistance (Quick Question Bot)**
  This documentation outlines how to access and use each feature effectively.

1. Report an Issue

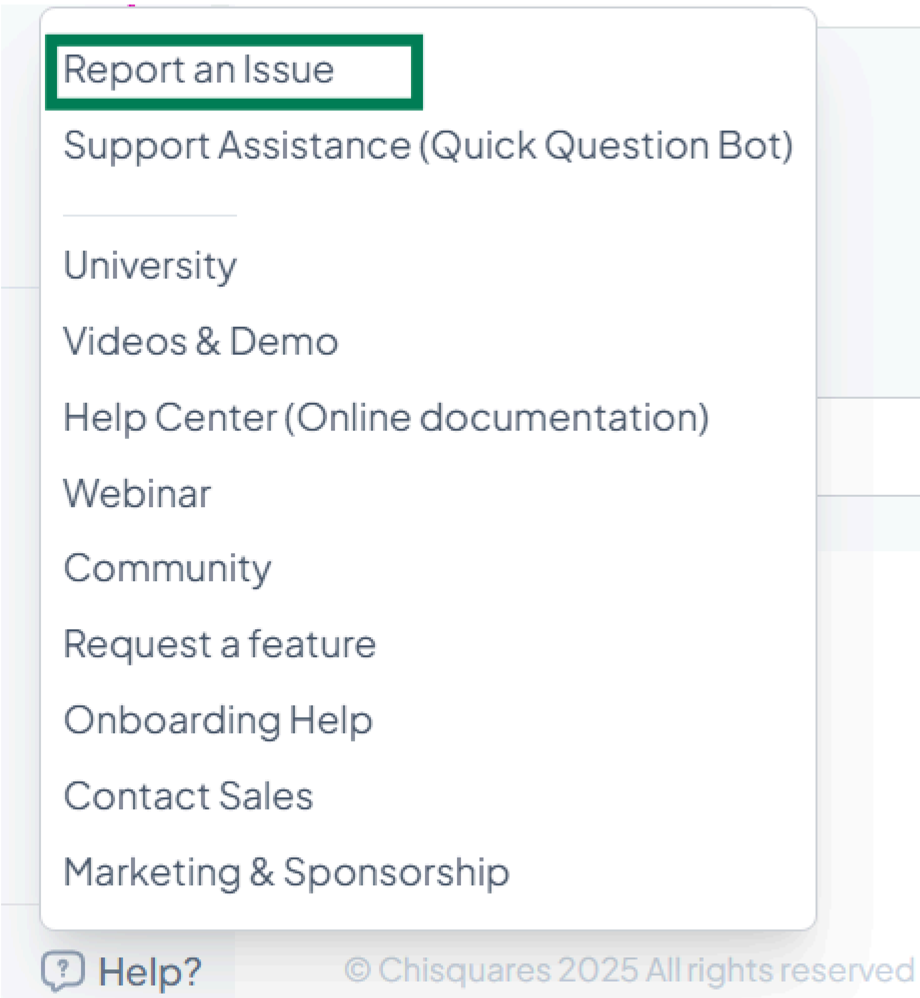
The **Report an Issue** feature allows users to communicate problems or suggest improvements directly to the Chisquares team.

Accessing the Feature

1. Click on the **Help?** icon at the bottom-left corner of the dashboard.


CHISQUARES
Data Analysis
Ai Toolkit
Survey Bank
Others
Storage
Upgrade
Billings
Account Settings
Notifications
10
II
Iliya Ishaya
Help?

2. From the dropdown menu, select **Report an Issue**.

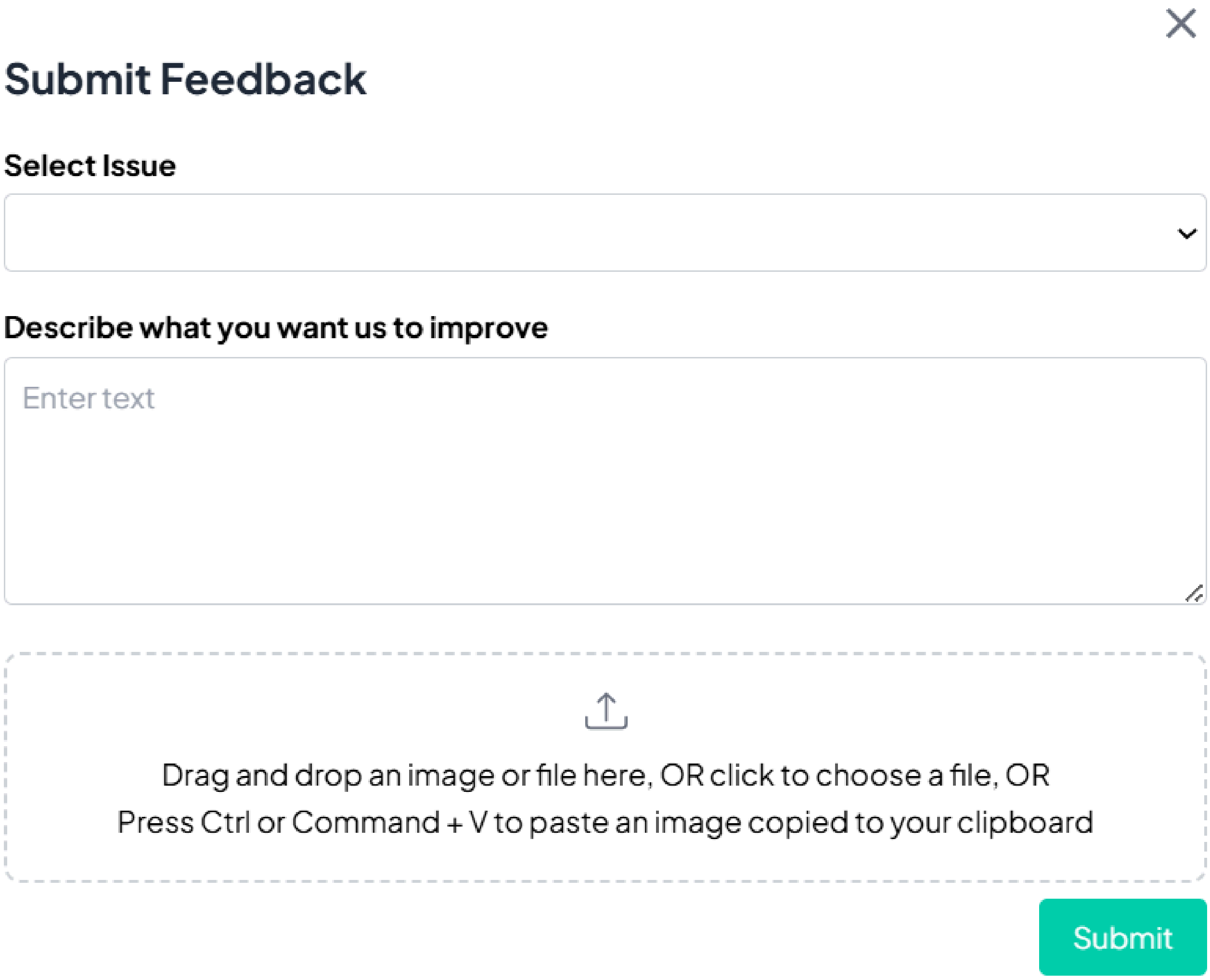


Submitting Feedback

Upon selection, a **Submit Feedback** form appears with the following fields:

- **Select Issue** (Dropdown): Choose the nature of the issue you're experiencing from the provided list (e.g., Bug Report, Feature Request, UI Problem, etc.).
- **Describe what you want us to improve** (Text Box): Enter a clear and concise description of the issue or suggestion.

- **File Upload (Optional):** You can upload screenshots or files to illustrate the issue by:
  - Dragging and dropping a file.
  - Clicking to choose a file.
  - Pasting an image (Ctrl/Cmd + V) from your clipboard.
- **Submit Button:**
  Click **Submit** to send your report to the support team.



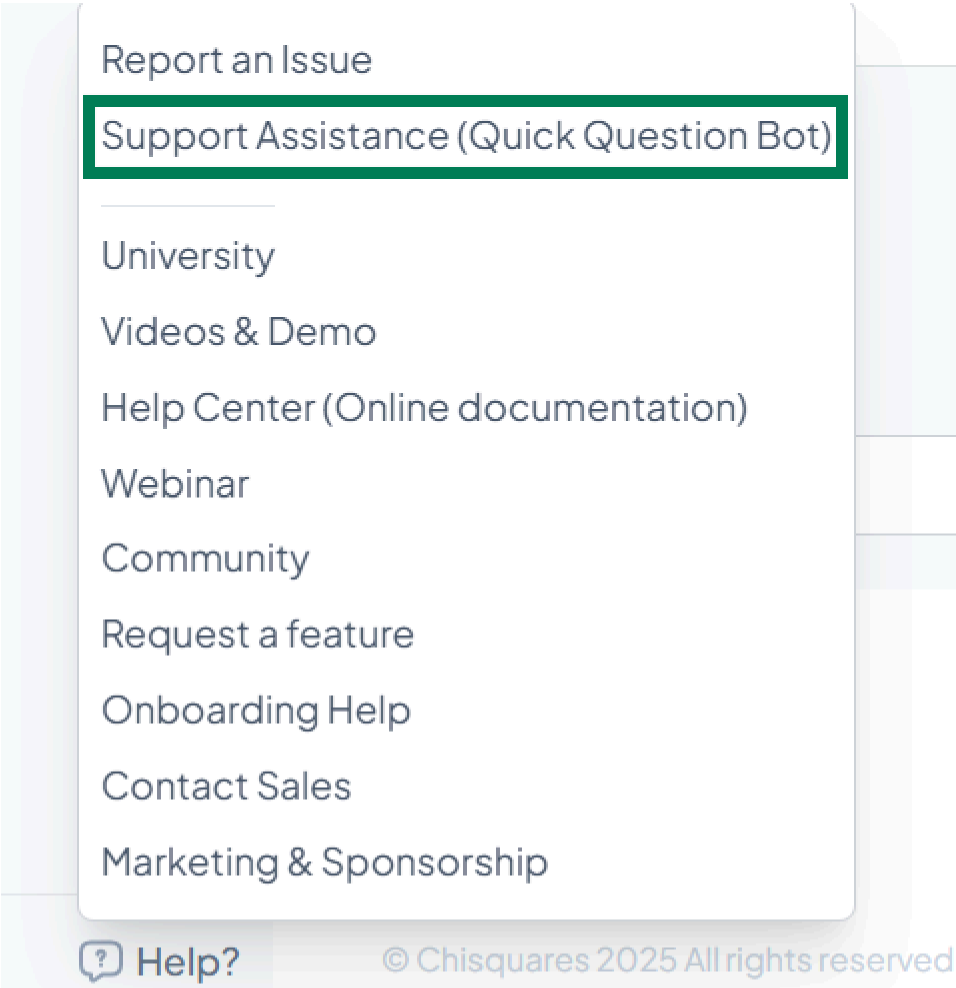
This feature helps the Chisquares team address your concerns efficiently and improve platform usability.

2. Support Assistance (Quick Question Bot)

The **Quick Question Bot** provides real-time support through an interactive chat interface, assisting with common questions and platform guidance.

Launching the Bot

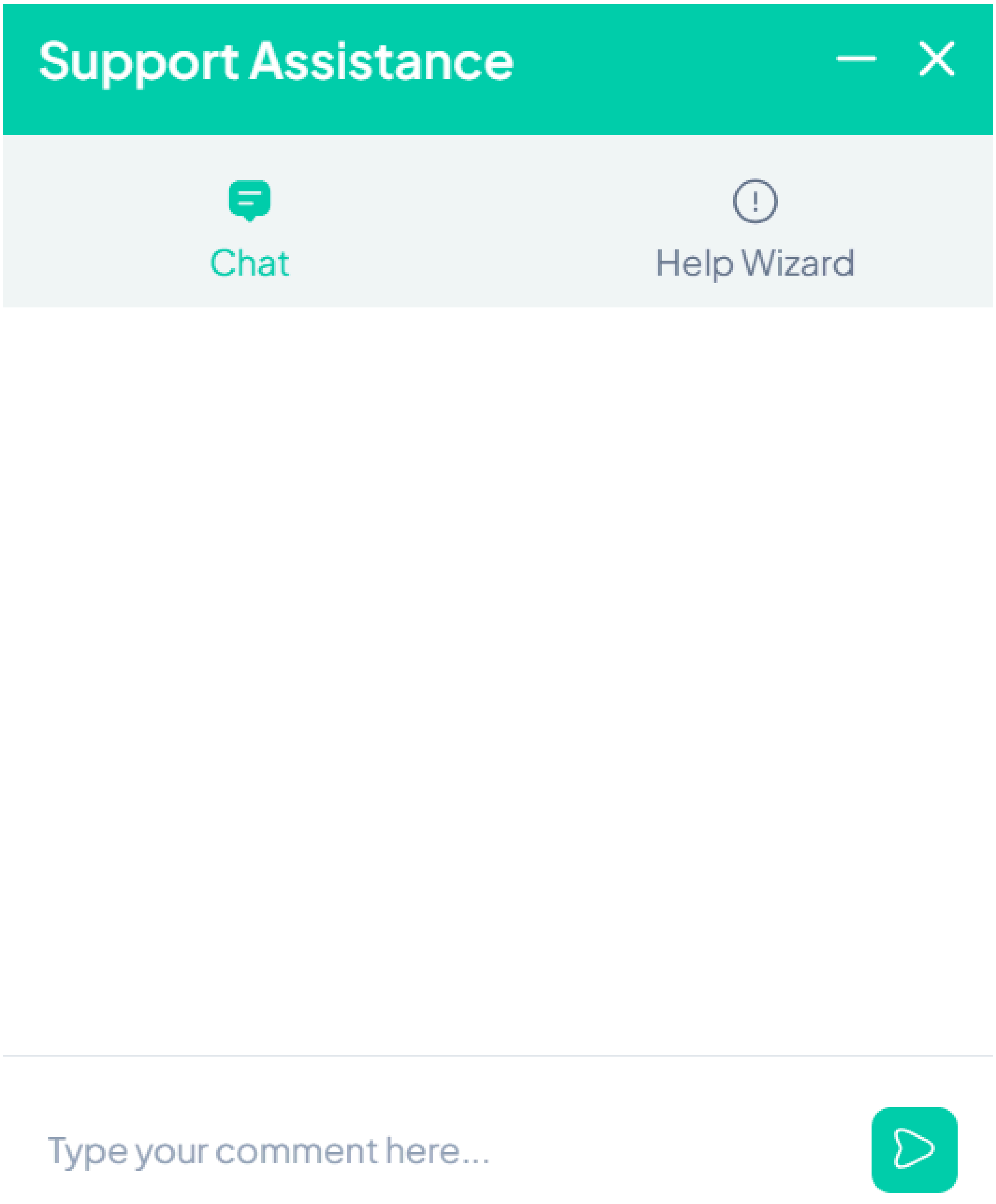
1. Click the **Help?** icon on the bottom-left.
2. Select **Support Assistance (Quick Question Bot)** from the menu.



Interface Overview The Support Assistance panel contains two main tabs:

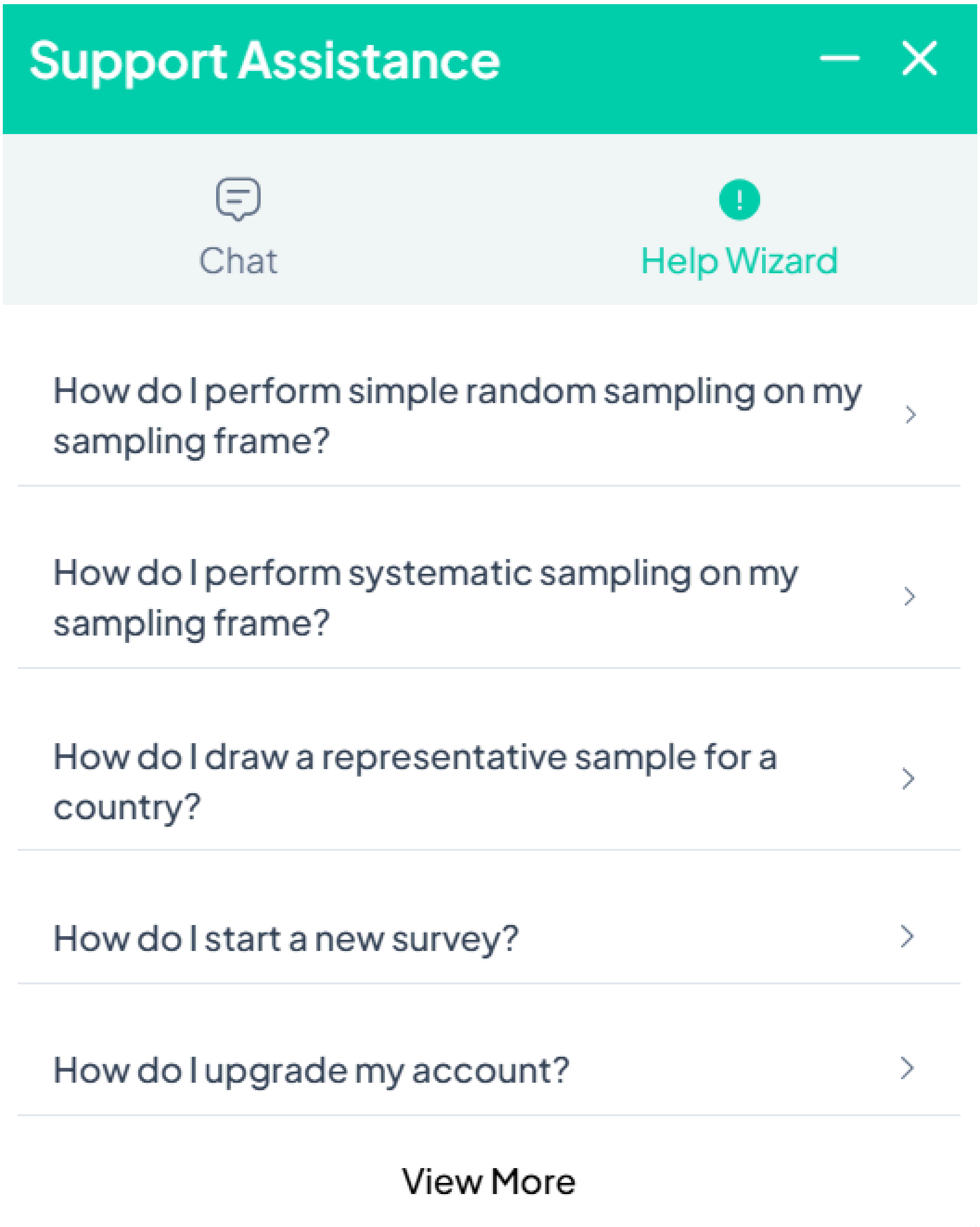
- **Chat** (default tab):

- Type your question or describe your issue in the text box labeled “Type your comment here…”.
- Hit Enter or click the Send button (green paper plane icon) to initiate the chat.



- **Help Wizard:**

- The Help Wizard in the Support Assistance panel is your go-to resource for guided solutions to commonly asked questions on Chisquares.



This tool is ideal for quick answers or when navigating the platform independently.

Getting Started / Other Resources / Uploading and Managing Datasets

What Can You Upload?

Chisquares supports the upload of:

- CSV (.csv)
- Excel (.xls, .xlsx)
- Public datasets (cleaned and curated)
- Survey data collected using the platform itself

Each uploaded dataset becomes part of the current project and can be used for immediate analysis.

When to Upload a Dataset

Upload a dataset when:

1. You begin a new analysis
2. You want to use public data stored by Chisquares
3. You've collected survey responses through the platform
4. You're replacing an old dataset with a newer version

How to Upload

1. Go to the Project.

2. Click on Upload Dataset.

3. Choose a source:

   - **Your Device:** Upload CSV or Excel
   - **Your Storage:** Use previously uploaded files
   - **Public Repository:** Browse and select from preloaded government/public datasets
   - **Collected Surveys:** Use data gathered through the Chisquares survey engine

4. Validate file:

   - The platform checks file type, structure, and size
   - File is converted into a secure and efficient format for internal use

5. Review metadata:

   - Dataset name and label
   - Number of rows/columns, missing values, date imported

Where to Access Uploaded Data

- Go to the **Dataset Codebook** (automatically loaded post-upload)

Who Can Upload or View Datasets?

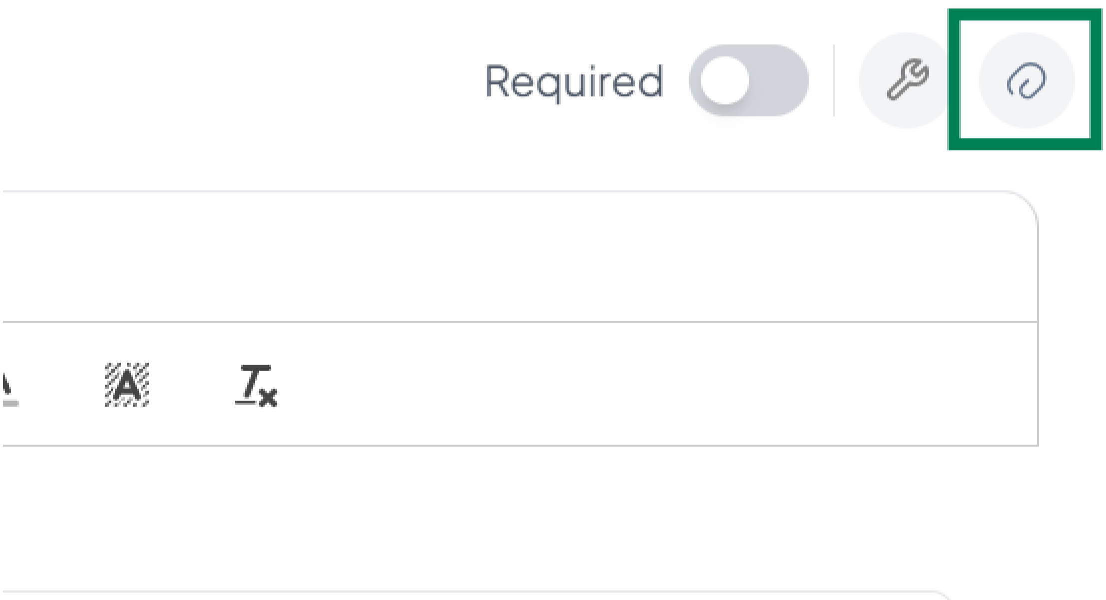
- All collaborators in a project can upload and view datasets
- Only **Project Owners** can delete datasets

Getting Started / Other Resources / Uploading a File

This guide walks you through the process of uploading a file (audio, video, or image) to the Chisquares platform. Only one media file is allowed per entry.

Step 1: Access the File Upload Option

1. Navigate to the section where a media file is to be attached.
2. Locate and click the **paperclip icon**.

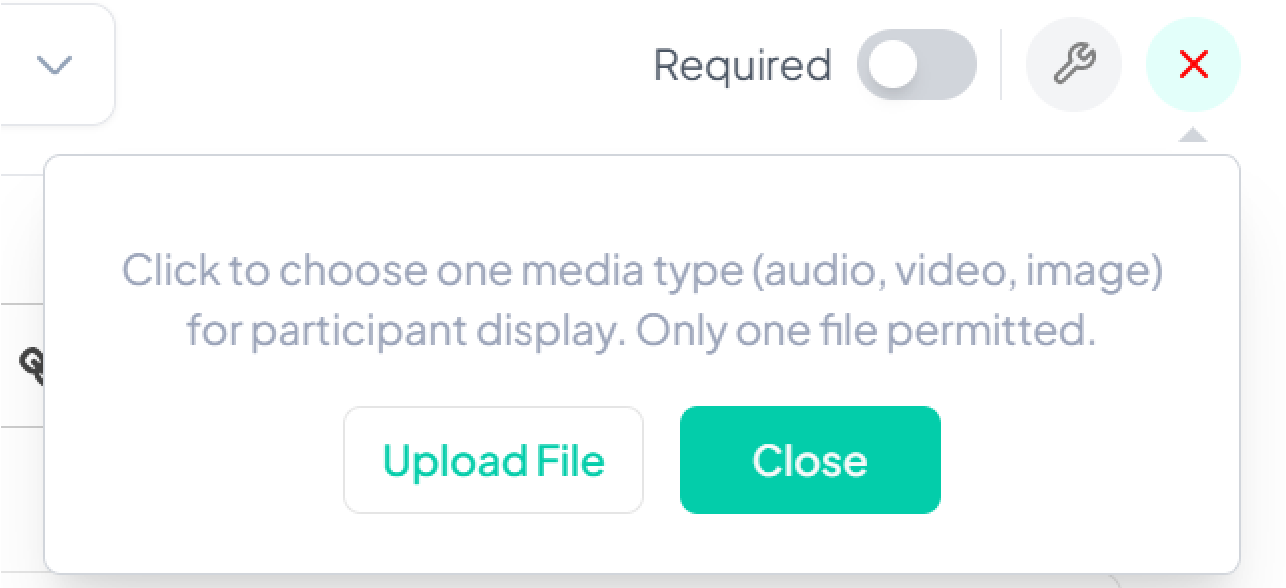


Step 2: Open the Upload File Dialog

1. A modal will appear stating:

> *"Click to choose one media type (audio, video, image) for participant display. Only one file permitted."*

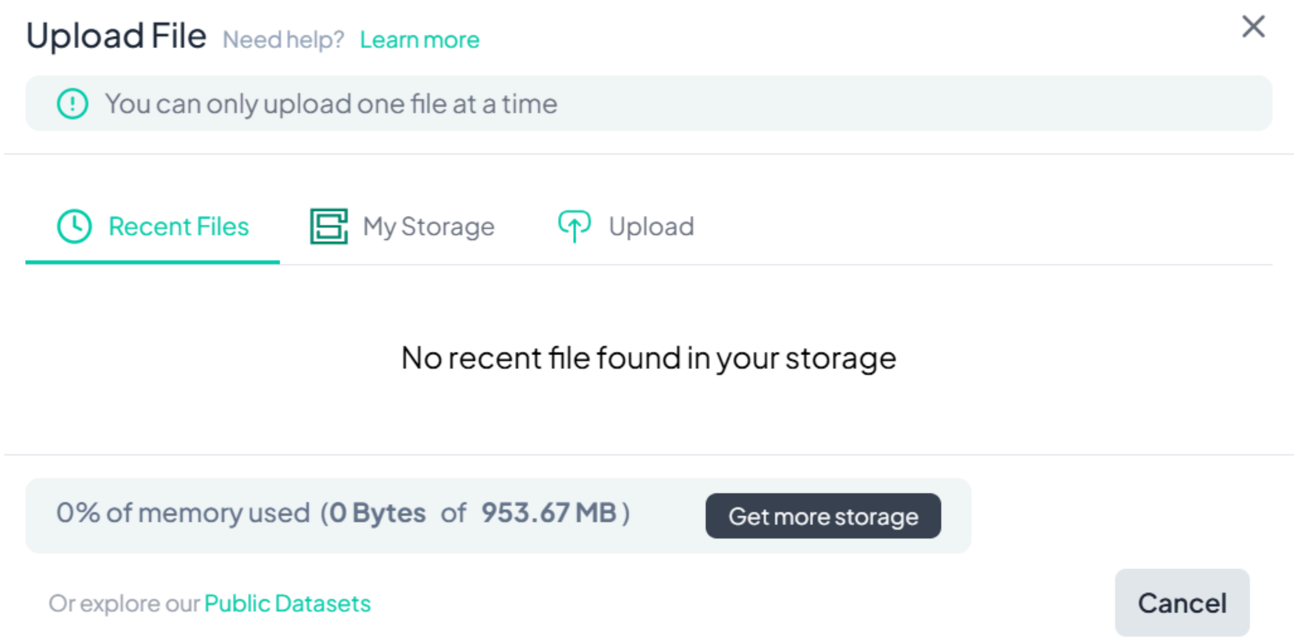
2. Click the **"Upload File"** button to continue.



Step 3: Select Your Upload Source

You will now see the **Upload File** interface with three tabs:

- **Recent Files**
- **My Storage**
- **Upload**



> Since no files are currently stored, you'll need to upload from your device or cloud storage.

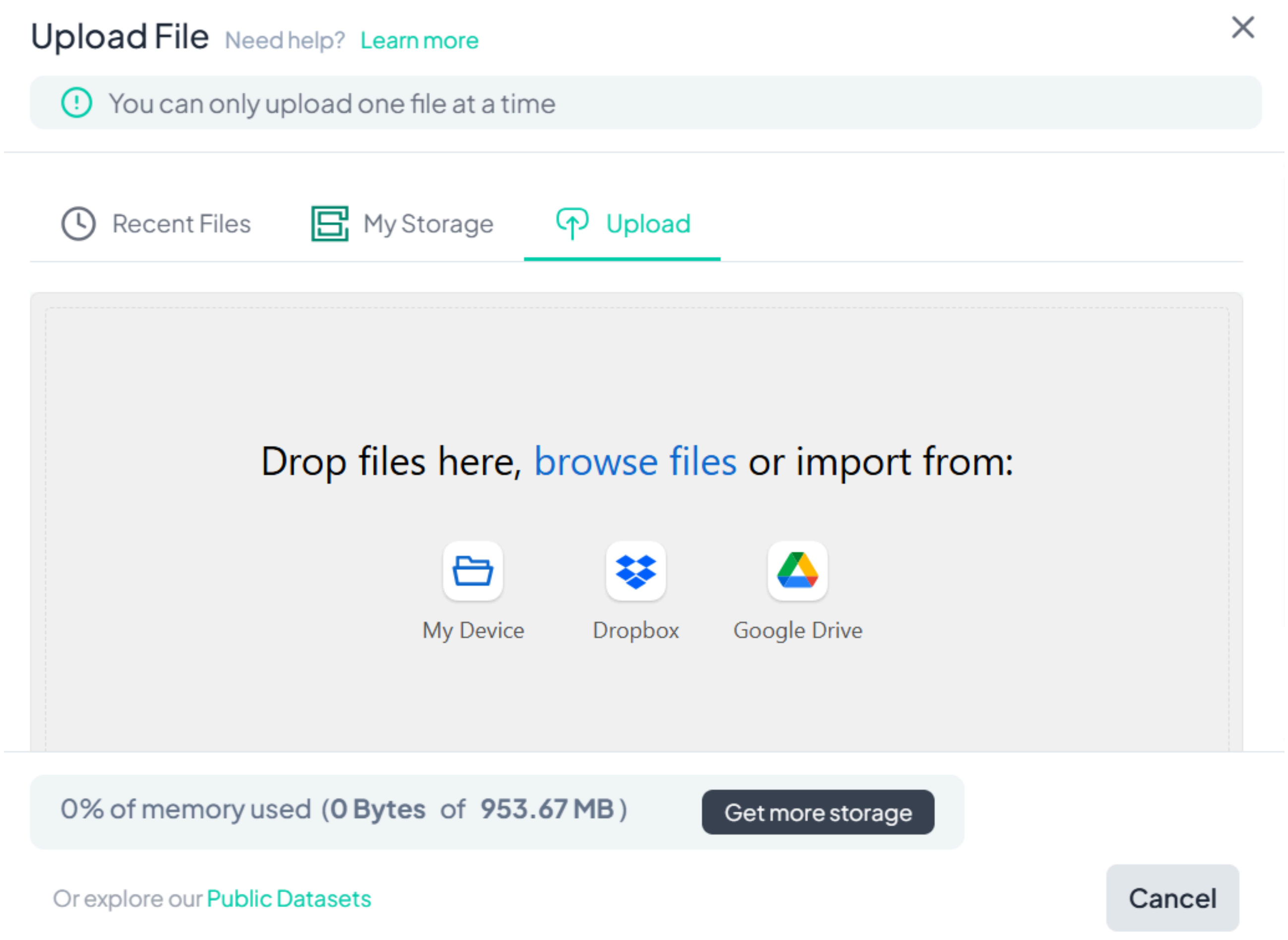
1. Click the **Upload** tab.

2. You'll see options to:

    - Drag and drop a file
    - Browse files from your device
    - Import from **Dropbox** or **Google Drive**

Step 4: Upload Your File

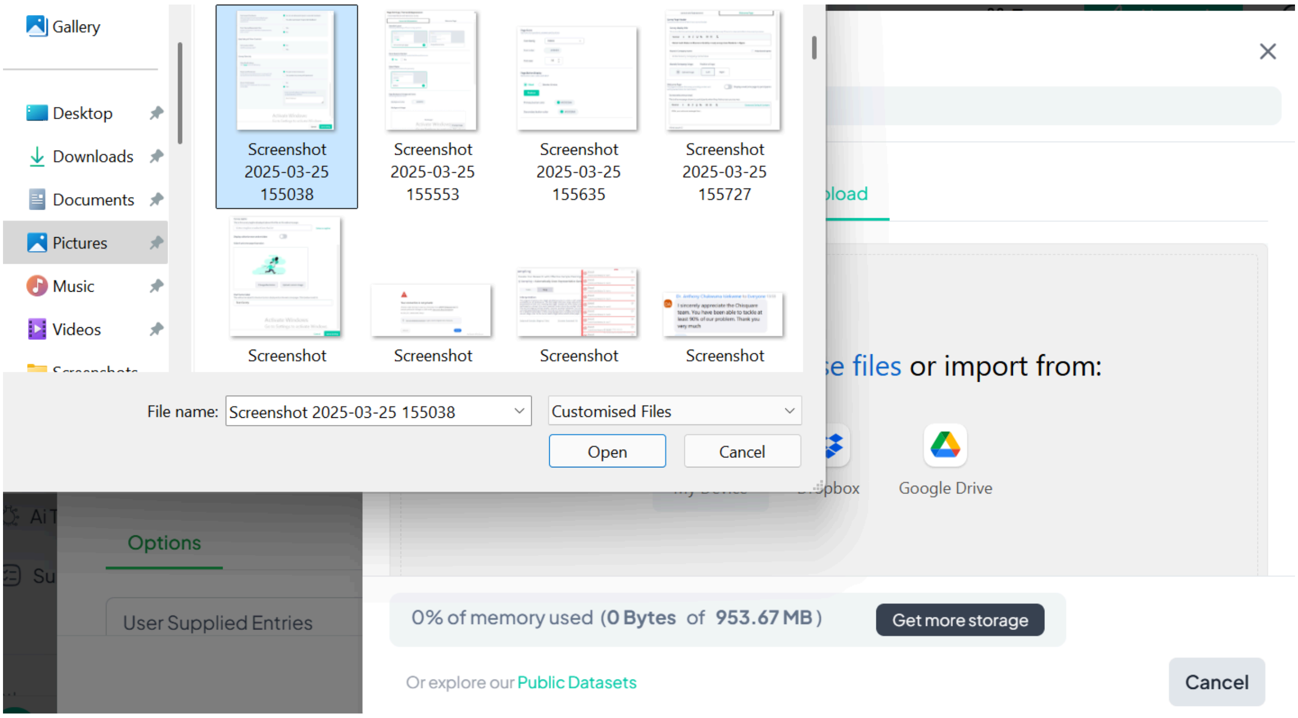
1. Click **"browse files"** or the **My Device** icon.
2. A file explorer window will open.
3. Navigate to and select the desired file.
4. Click **"Open"** to upload.



Step 5: Confirmation

Once uploaded:

- The file will appear under the upload area.
- You can **remove or replace** the file before saving or continuing.



Additional Notes

- Supported file types: Audio, Video, Image
- Maximum storage usage is indicated at the bottom of the upload modal.
- Explore **Public Datasets** if you want to use pre-existing content.