

Merlinco

Fact Sheet No.2

MERLINPLUS

1 Overview

MERLINPLUS is a comprehensive Windows based survey processing package, containing facilities for questionnaire design or description, data capture, straightforward top line results, cross-tabulation and export of data and tables to other systems. Data capture facilities are provided for CAPI (Computer Assisted Personal Interviewing) and CASI (Computer Assisted Self-administered Interviewing) situations, as well as document-to-disk mode. Interviewing may be conducted on the desktop or the web.

MERLINPLUS is easy and straightforward to use: the procedure consists of answering questions, selecting items from menus and filling in forms at the screen. There are built-in “help” facilities as well as a tutorial. There is a small amount of “syntax learning” required if the user wishes to specify complex routing or new variables (although there is a feature to assist with this).

MERLINCO offer a one-day training course in the use of MERLINPLUS which, together with the on-going support service, is perfectly adequate for most users to become proficient in using the software.

For much of its work, MERLINPLUS acts as a front-end to the MERLIN command language (see fact sheet 1). This powerful suite of programs has been developed over 30 years on a wide variety of systems, and is now one of the best-known and most widely used packages of its kind.

By its very nature, MERLINPLUS is unable to capture through questions, menus and forms all the power available to the MERLIN user, and the product is not aimed at the professional survey analyst – more at those who wish to make occasional use of computer tools for survey work. That said, certain features of MERLINPLUS (e.g. CAPI and auto tables) may be useful to professional survey processors. It is possible to do some parts of a project using MERLIN, and other parts using MERLINPLUS, as the files are easily transportable.

2 MERLINPLUS subsets

MERLINPLUS consists of a number of separate programs, and some of these can be supplied in stand-alone mode:

MERLINPLUS Definition (MPD) is the Questionnaire Definition module, which can also generate the questionnaire in Microsoft Word.

MERLINPLUS Interviewing (MPI) is the CAPI / CASI module. There is also a web interviewing facility.

MERLINPLUS Key-to-disk (MPE) is the data capture module for document-to-disk mode, which can also be used for data verification, editing, and sorting.

MERLINPLUS Database comprises the Tables Specification and Report modules. This is useful for end-users of survey data who wish to carry out their own analyses. It is also possible to do analysis of projects set up in MERLINPLUS with a *free* program called FASTAB (see fact sheet 3) or with MORE (MERLIN On-line Reporting Engine).

3 Further information

This document summarizes the main features of MERLINPLUS.

For more information on MERLIN and other Merlinco products, contact John Tebboth at Merlinco Ltd, on +44 (0)20 7709 3000 or email info@merlinco.co.uk.

4 Operating environment

MERLINPLUS runs under Windows Vista Service Pack and VB.NET v4.6 upwards (it may run on earlier versions of Windows but we do not support these). It interacts with Office 2007 upwards.

Simple installation instructions are provided with the software, and no “tailoring” of the operating system is needed.

5 Technical considerations

There are no limits on the number of questionnaires that can be handheld (other than the physical size of the disk).

Data may be stored as ASCII records up to 99999 characters long, comma-separated value (“csv”) records containing up to 4096 fields, or “card images” up to 100 columns long with up to 99 cards per respondent. MERLINPLUS uses industry standard data files: these may be imported from other data entry programs, and exported into other analysis programs.

Questionnaires may contain up to 9999 “entries”: an entry is a question, a grid (containing up to 702 questions), a filter or a variable. A precoded question may contain up to 999 responses.

Up to 1000 tables may be specified in a single run.

6 Using MERLINPLUS

- MERLINPLUS covers the entire survey process from start to finish, but also allows you to do parts of the process using other software if you wish.
- MERLINPLUS can provide on-line, context sensitive help – information on the sort of response required from the user – at any point, whenever a special key is pressed.
- MERLINPLUS contains powerful display features. At any point the user can display information already entered: e.g. he can review the definition of Q7 whilst defining Q9.
- MERLINPLUS contains “security devices” to safeguard the user against making changes to the questionnaire that would result in incompatible data files being generated.
- MERLINPLUS has controls to allow the user to specify the number of characters to be printed per line and the number of lines to be printed per page on the reports it generates.
- MERLINPLUS tables can be exported directly into Adobe Acrobat, Microsoft Word or Excel, or Winyaps, or Merlinco’s charting wizard.
- MERLINPLUS includes MTWA (another Merlinco product), which generates high quality output in Adobe Acrobat and Microsoft Word, that can be tailored to your style.
- MERLINPLUS uses plain text files to hold questionnaire and tables definitions. The user can generate and modify these files outside of MERLINPLUS.
- MERLINPLUS is modular in construction: the various parts are interlocking but independent. Questionnaire Definition, interviewing, and key-to-disk are available separately.

7 Questionnaire definition and production

- MERLINPLUS Questionnaire definition can be run in stand-alone mode.
- MERLINPLUS Questionnaire definition can be used to design a new questionnaire or describe an existing one (i.e. that had already been designed and printed).
- MERLINPLUS allows the user to build a questionnaire over several sessions. A session's work may either be saved or abandoned at the end of the session.
- MERLINPLUS allows the user to make use of already defined questionnaires when building a new one. Any number of questions from any number of questionnaires can be imported.
- MERLINPLUS can columnate (and re-columnate, as often as necessary) questionnaires, or, if the user prefers, he can allocate column numbers and codes to each question manually.
- MERLINPLUS distinguishes between five types of question – single response, multiple response, numeric without decimal point, numeric with decimal point, and text.
- MERLINPLUS allows users to build grids out of questions which share the same set of responses; grids may be any type except text, and may consist of up to 702 “elements” (sub-questions).
- MERLINPLUS allows the user to build filters out of questions and grids, to control routing.
- MERLINPLUS has a sophisticated question renumbering routine, which leaves alphabetic prefixes, suffixes and whole question names unchanged, but otherwise renumbers from 1 all the questions in the questionnaire. Individual questions can also be renamed.
- MERLINPLUS allows users to insert, edit, delete, copy and move entries anywhere in the questionnaire.
- MERLINPLUS has facilities for interviewer text (to be read out) and instructions to be inserted before and after question texts.
- MERLINPLUS has facilities for routing instructions to be inserted following question or response text.
- MERLINPLUS can export the questionnaire defined to Microsoft Word, using a template which the user can tailor to his requirements. Options in MERLINPLUS control whether or not the questionnaire shows column and/or response numbers, or tick boxes.
- MERLINPLUS questionnaires can also be saved as ASCII (text) files.

8 Interviewing (MPI)

- MPI can be run in stand-alone mode, using the file generated by Questionnaire definition. The standard version runs on a PC, but interviewing may also be done on the web.
- MPI is primarily intended as a CAPI or CASI tool, with either interviewers or respondents keying the answers. It can also be used to do document-to-disk entry where careful control rather than speed is required.
- MPI has three modes – interview, resume, and edit – resume and edit are explained at the end of this section.
- MPI takes full account of routing – it does not display questions or responses that are filtered out.
- MPI shows single and multiple response questions and grids as menus, and the user can select the required response(s) using the mouse. Alternatively, responses can be numbered, and selected by typing the required number(s) – this allows interviewing to be done without using a mouse.
- MPI can show responses in random order if required (different for each respondent), and can also present grid questions in random order.
- MPI will right-adjust and zero-fill numeric data if leading zeros are not entered.
- MPI can optionally store verbatim responses in a separate file, and has a facility for coding these responses into the main data file.
- MPI can place the respondent's answer to a previous question in the text of a later one (dynamic text substitution).
- MPI can display additional screens of text before or after the questions.
- MPI checks each answer as it is entered, and will not proceed until a valid answer is given. In the case of numeric questions, answers can be checked against a specified range. The user may key a special character to indicate “no answer”.
- MPI can also be made to check logic or arithmetic across several questions, and jump backwards for re-entry if necessary.
- MPI has some special options which may be used during the interviewing process. One of these allows the user to go back to any question previously answered and recommence entering data from that point. Another causes the current interview to be terminated.
- MPI has an option which allows the user to display the data entered so far.

- MPI resume mode allows additional data to be added to existing interviews. In this mode, MPI can refer to data collected in a previous interview, or to names, phone numbers, etc.
- MPI edit mode allows the user to edit any question in any interview. It can also be used to delete an unwanted interview.

9 Key-to-disk data capture (MPE)

MPE is described more fully in fact sheet 5. It is a command-line program.

- MPE can be accessed from within MERLINPLUS (driven by the file generated during Questionnaire definition), or run in stand-alone mode, driven by a “quick-entry” file generated within MPE itself.
- MPE can be used for data entry, editing and verification.
- MPE functions can be question **or** column oriented. As many “fields” as possible are displayed on a single screen, in one or two columns as preferred, to facilitate fast “eyes down” data entry.
- MPE can handle any of the data formats supported by MERLINPLUS generally, except “csv”, and can be used to convert between different formats.
- MPE can read in any number of physical files, and output them as a single physical file.
- MPE can produce an “index” of all the serial numbers in one or more files, and sort any type of data into serial number order.
- MPE allows the user to set numerous “preferences” regarding display of error messages, etc.

10 Data reporting

- MERLINPLUS offers a number of reporting facilities besides tabulation, the main ones being report editing and data listing. Report editing is used to check the validity of the data, and data listing is used to list data on a disaggregated basis.
- MERLINPLUS report editing checks that all questions have been answered (although exceptions may be specified), and that answers are valid (in range, numeric or text, etc.).
- MERLINPLUS report editing checks both forward and backwards: i.e. if the filter for a question is true, the question must be answered, and vice versa.
- MERLINPLUS report editing has facilities for checking that a response is the only response if present, and for cross-checking responses across questions.
- MERLINPLUS data listing can display the value of any question(s) and/or variable(s), and can be filtered on a sub-set of the respondents.
- MERLINPLUS data listing can be formatted into a presentation report, with numerous output options, or into a file with no page breaks, suitable for processing by another program, including Microsoft Excel.

11 Questionnaire Report

- MERLINPLUS questionnaire report provides a “top-line” summary of the data in all questions and variables, with minimal specification. They have the appearance of a questionnaire, but with data counts instead of response codes.
- MERLINPLUS questionnaire report shows data as counts and percentages, plus statistical information for numeric data.
- MERLINPLUS questionnaire report can be filtered on a sub-set of the data.
- MERLINPLUS questionnaire report is generated in Microsoft Word, as described in section 7.

12 Tables

- MERLINPLUS allows the user to build a table definition file over several sessions. A session's work may either be saved or abandoned at the end of the session.
- MERLINPLUS table definition files may be run as often as necessary, on different data if required.
- MERLINPLUS allows the user to insert, edit, delete or move tables, anywhere in the file.
- MERLINPLUS can build an automatic table definition file, containing one table for each variable. The user can then modify this in the usual way.
- MERLINPLUS permits the definition of new variables in the table definition phase, to enable tables to summarise data in different ways than the questionnaire. Once defined, variables are added permanently to the file (i.e. are available for later analyses).
- MERLINPLUS contains a table-renumbering feature analogous to question renumbering.
- MERLINPLUS tables must have a side (i.e. row) specification. They may also have a top (i.e. column) specification, filter specification, a weight specification, title and footnote, and many layout settings which describe how the printed table is to appear.
- MERLINPLUS incorporates about 300 layout settings, controlling margin and column width, percentaging and statistical options, page and table numbering, decimal places, row ranking, zero suppression, display of weighted and unweighted data, and text layout.
- MERLINPLUS grids can be tabulated, either as they appear, or selectively, showing individual questions.
- MERLINPLUS numeric questions can be tabulated to show full distribution and/or statistics such as mean, standard deviation, standard error and error variance.
- MERLINPLUS contains a special target weighting feature, whereby the program calculates weighting factors to bring the sample up to specified targets. A multi-dimensional target matrix may be supplied, and "rim" weighting is also supported.
- MERLINPLUS tables can be exported directly to Adobe Acrobat, Microsoft Word, Microsoft Excel, Winyaps, or a text editor such as Wordpad.
- MERLINPLUS includes another Merlinco product called MTWA, which generates high quality output in Adobe Acrobat and Microsoft Word, that can be tailored to your style.
- MERLINPLUS tables can also be exported to E-Tabs via the TabsML standard.

13 Import and export facilities

- MERLINPLUS incorporates MERLIN Toolkit (see fact sheet 4), which can be used to import from, and export to, other software – both Merlinco products and others.
- MERLIN Toolkit can export a survey set up in MERLIN or MERLINPLUS to a form suitable for processing by MERLINPLUS Database. In this way, MERLINPLUS databases can be set up for end users to do their own tabulation.
- MERLINPLUS itself can export a survey set up in MERLINPLUS to MERLIN. In this way, text and definitions for MERLIN can be entered by a non-MERLIN user.
- MERLIN Toolkit can export data into any of the following formats: fixed format ASCII, comma-delimited ASCII, Market Mind, Quantum, SPSS, SAS, and Triple-S. Texts and definitions will be created where appropriate.