Email Questionnaire 4.0

User Manual

2007/6/27

Introduction

Email Questionnaire is an interactive email survey system. Unlike other on-line questionnaire systems that need a web server to construct, distribute and manage results, Email Questionnaire is totally email based. It works with your existing email system making on-line questionnaire surveys available to anyone with an Internet connection. It is simple to use and will have you distributing questionnaires in a matter of minutes.

Overview

Email Questionnaire is an easy to use tool that makes quick work of creating simple questionnaires that are distributed to recipients via email. Questionnaire replies are also retrieved via email making the need for a web server obsolete. If you use a non-web based email (email is retrieved through a mail client on computer) then you can start using Email Questionnaire today!

EQ's powerful features include:

- No web servers needed.
- Mime standard supported.
- Outlook/Outlook Express integration.
- Direct dispatch via SMTP/Exchange Server.
- Modify colour, font, alignment, etc easily.
- Tree layout makes questionnaire editing simple.
- Templates for easily creating great looking questionnaires
- Questionnaire replies automatically retrieved using a number of methods.
- Easy questionnaire management.
- Various reports.
- Extend or resend a questionnaire to new recipients anytime.

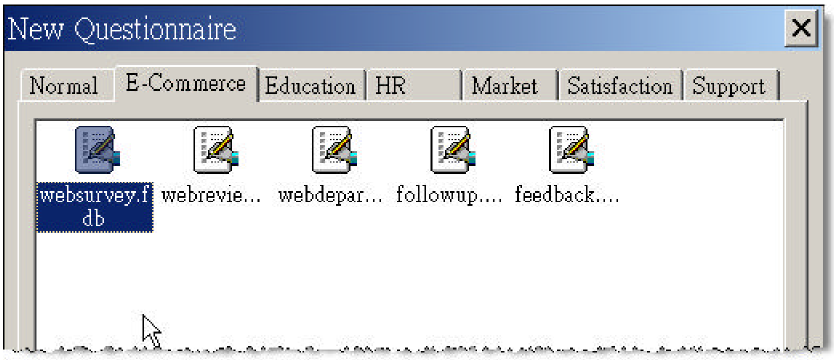
System Requirements

- OS: Win98, Win2000, WinXP
- Browser: IE5 and above
- Email Client: Eudora, Outlook Express, Outlook, Yahoo! Mail, hotmail

Questionnaire View

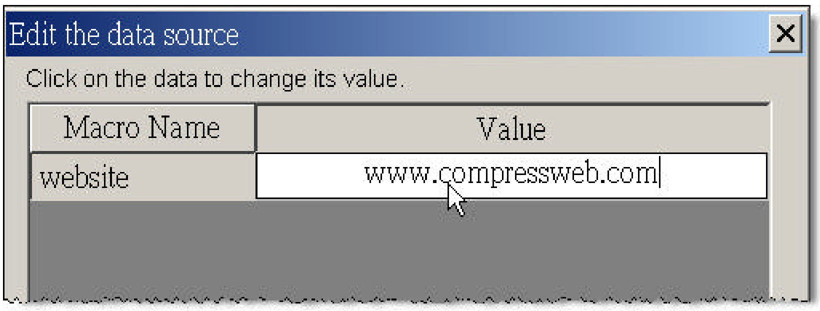
To create a new questionnaire, simply click the New toolbar icon or select **New** from the File menu in the Questionnaire view. You can then select the questionnaire template that you want to use from the Form menu. By default the ' untitled' template is chosen, this gives the greatest flexibility over questionnaire design. If a predefined template is chosen it can be modified to suit the type of questionnaire you are designing.

Select the questionnaire template



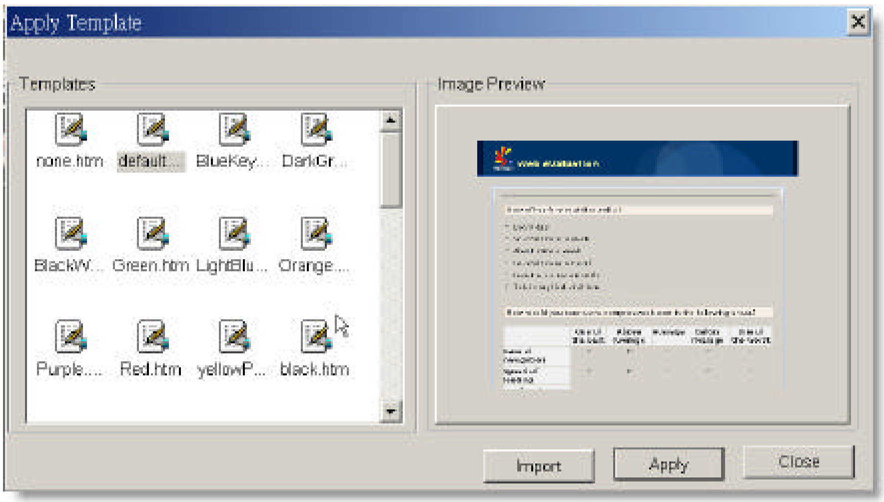
If the predefined template selected contains predefined macros, a dialog pop-ups to let you specify the value. For example, the URL of a website or the company name.

Specify the values for predefined macros



You could then choose the HTML template you would like to use.

Select the HTML template



Tree Layout View

The Tree Layout View is used to design the questionnaire. Double click on the top-most node, you can set the properties. Right clicking on the tree nodes allows the addition of questionnaire components: pages, questions, select items and comment items. The Windows drag and drop is fully supported within the application.

Questionnaire

The top-most node represents the questionnaire that your are editing.
You could change the following properties for the questionnaire:

Title—The HTML title that will appear when the questionnaire is sent as a HTML attachment.
Click The “M” button if you would like to add a Mail Merge field.

Email subject—The subject of the email that the questionnaire participants receive.
Click The “M” button if you would like to add a Mail Merge field.

Logo—The image that you could put on the top-most of the questionnaire. Usually, it is an image file of your company logo.

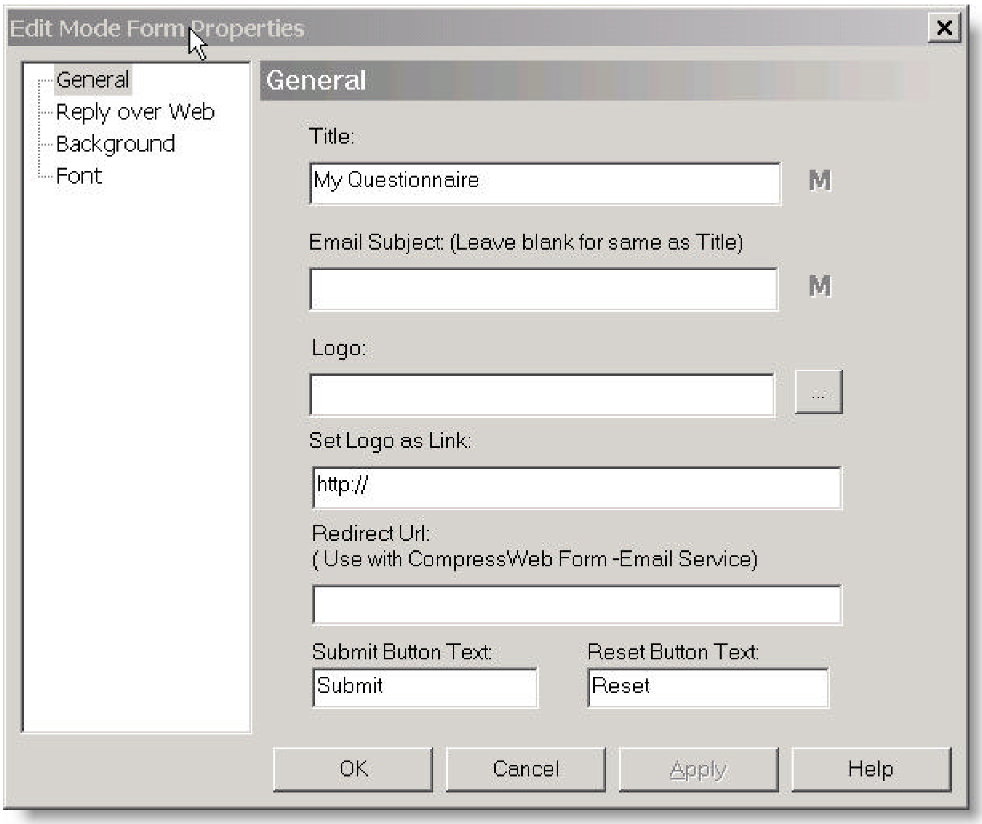
Set Logo as Link— Sets the URL property of your logo. Therefore, when users click on your logo, the browser will navigate to the URL specified.

Redirect URL—By default, a “Thank you” page will appear after users click on the submit button of the questionnaire. However, you may display your own HTML pages if necessary. Put in the URL of the HTML page in this field and it will appear after the questionnaire is submitted.

Submit button text— Change the text the “submit” button displays. Usually you could translate it to your native language.

Reset button text— Change the text the “reset” button displays. Usually you could translate it to your native language.

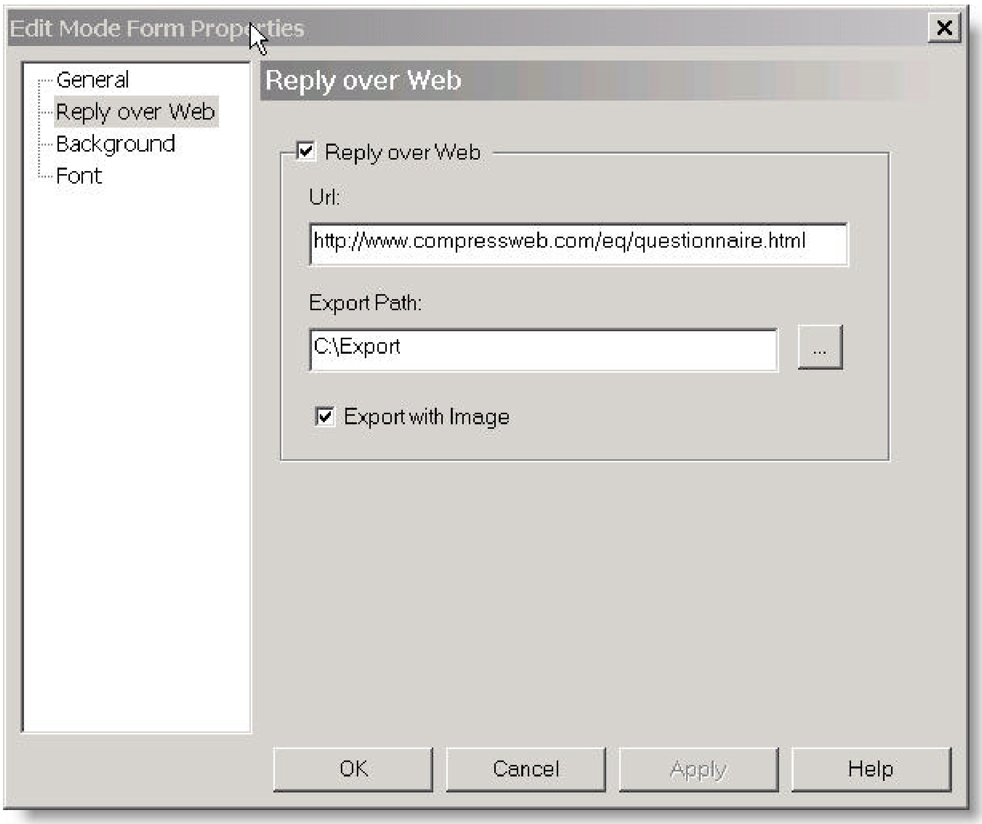
Edit Questionnaire properties



Reply Over Web Property page

When a recipient’s email client does not support HTML emails, or render the HTML email incorrectly, the recipient may not be able to see or submit the questionnaire. EQ provide a way to compensate this. You could generate a web version of the questionnaire and put it in your website. After that, EQ automatically put the URL at the end of the HTML version, and also in the plain text version of the questionnaire. When the recipients are unable to reply the questionnaire in the email client, they could navigate to the URL and reply using their browsers.

Edit the Reply Over Web properties



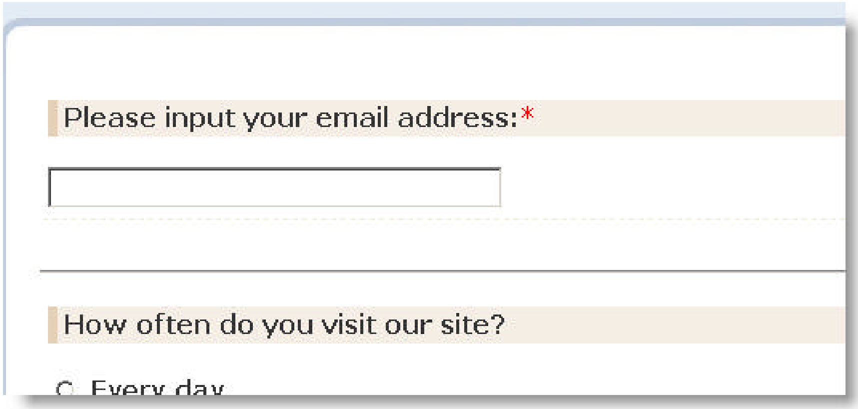
Url—Specify the URL of your HTML files. EQ will then automatically notify the recipients about this, and they could use this URL to reply when they have problem to submit the questionnaire. If this field is left empty, you could manually send this URL to your recipients too. Note that EQ will not help you to publish the HTML files to the URL. You will need to copy the saved HTML files to your web server.

Export Path— Specify the path where the HTML files will be saved. If this field is not left empty, EQ will generate a HTML version of the questionnaire to the path specified. You could then copy this file to your web server.

Export with Images—If selected, EQ will create a directory called "images", which all GIF/JPEG files are saved. Then the HTML file will contain links to these graphic files. Otherwise, EQ will generate a HTML that does not use any graphic files.

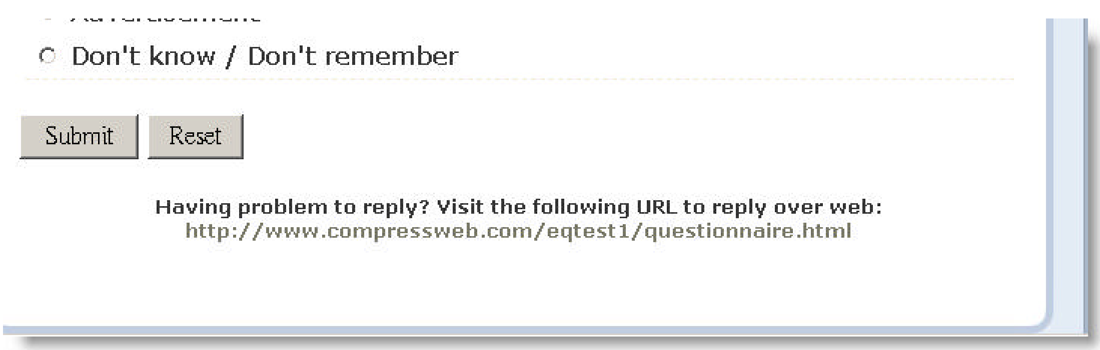
Since each questionnaire needs to have an email address to identify the recipients, the exported version will contain an additional text input to let the recipients enter their email address. This text input has the "must have answer" property turned on, this means that the recipient will not be able to submit with this field empty.

An additional text input to specify the email address of the recipient.



When sending a MIME embedded email, the URL will be placed at the bottom of the email with a short message to notify the recipient.

Notify the recipient to reply over web



Questions

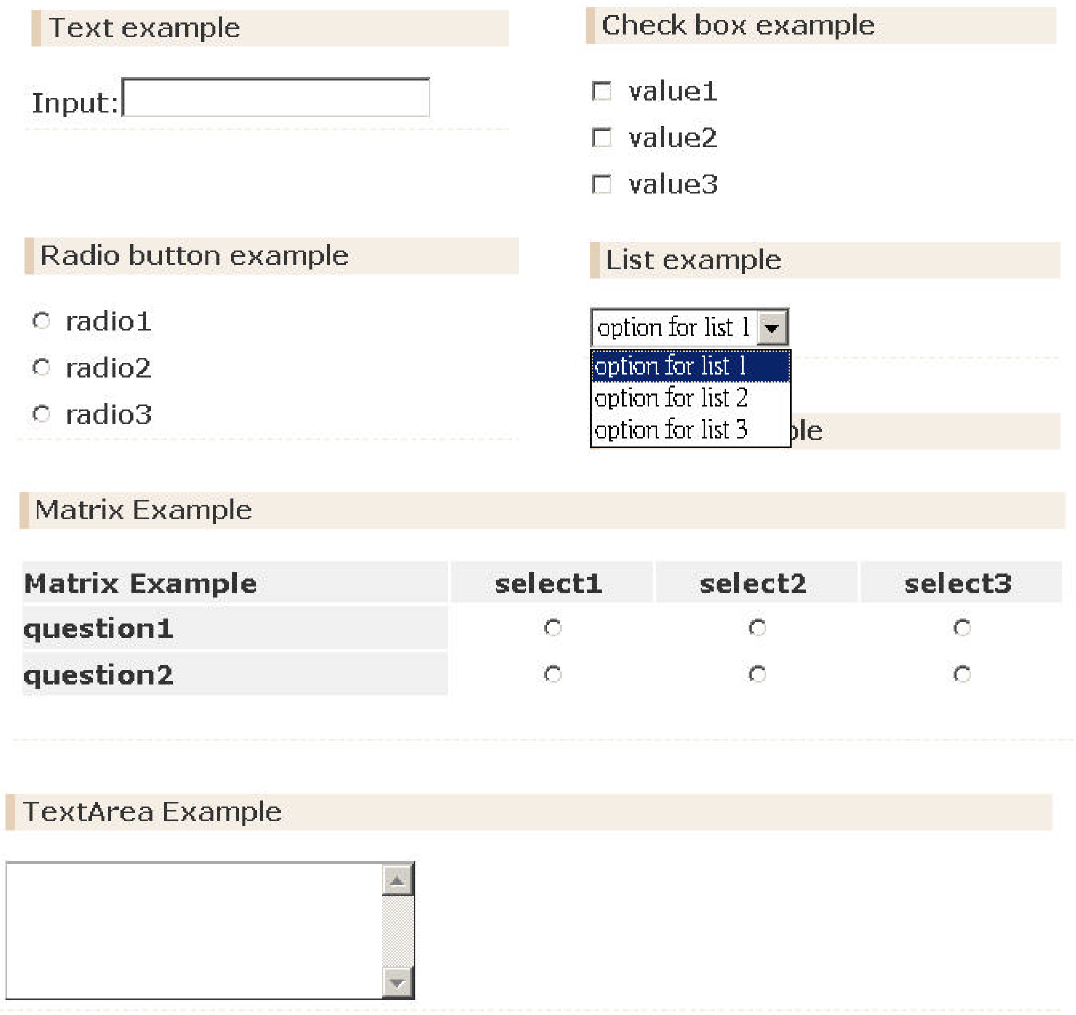
Questions represent the fundamental components of the questionnaire. Add new questions by right clicking on the page node in the tree layout view and selecting Question or Question Library. For more information, see Question

Creation.

Select Items

Each question can contain select or comment items. Select items require a response from the recipient of the questionnaire and are included in the generated reports. For example "checkboxes" are one type of select item. Add new select items by right clicking on question nodes in the tree layout view. Six different types are available. Once the select item type is chosen, you can use the Answer Library to enabled the "pre-canned" responses or design your own. For more information, see Select Item Creation.

Select items supported by Email Questionnaire



Comment Items

Comment items are used for designing the form but do not participate in the generated reports. E.g. pictures. Add new comment items by right clicking on question or page nodes in the tree layout view.

Three types of comment items are supported: Labels, Separator, and Images. The examples of these comment items are listed below:

Example of Using Label Comment Item

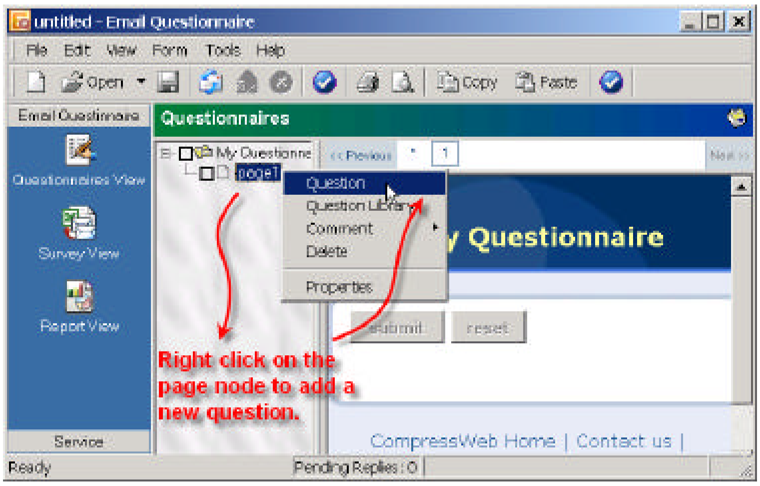
Example of Using Separator Comment Item

Example of Using Image Comment Item

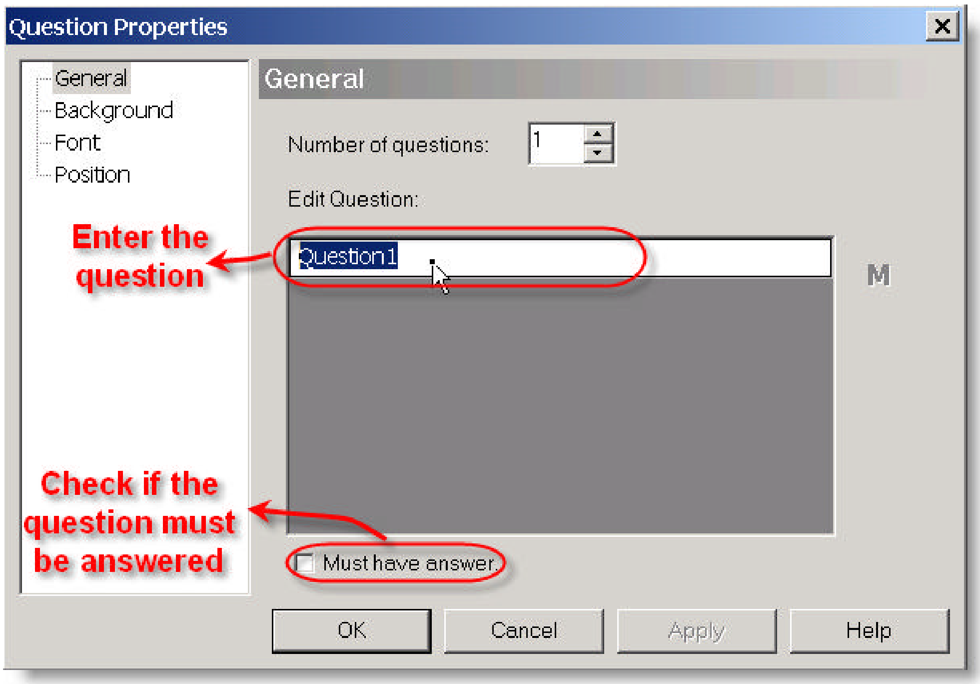
Question Creation

The questionnaire is designed and edited through the tree layout. Right click the page node and select Question. The Question Properties dialog box will then appear. Select the desired number of questions and edit the question text in the "Edit Question" view.

Add a question from the page node

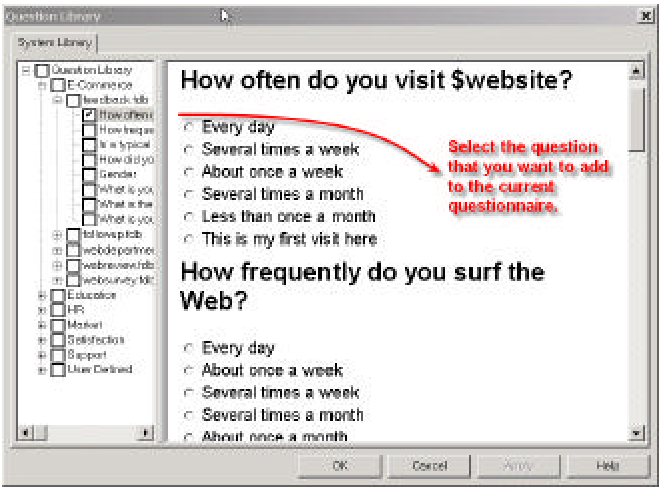


The Question Properties dialog box

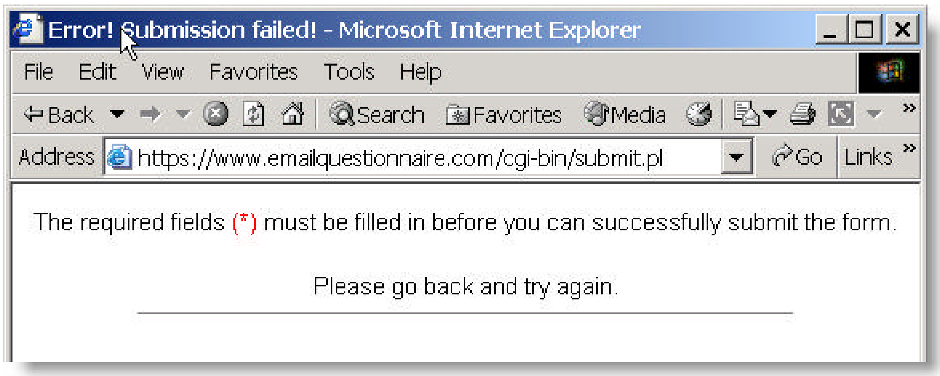


Another way to create questions is to right click the page node and select Question Library. You can then select some pre-defined questions. The question library is classified into six predefined categories, plus the user-defined one. You can traverse and select the questions you want to add. If the question must be answered before submission, you could enable the option for “Must have answer”. If respondent does not answer it correctly, a warning message will be displayed.

Add questions from the predefined Question Library



A warning message to notify user that some answers are missing



The questions can be edited later if required by right clicking or double clicking on the question in the tree layout view after it has been added to the questionnaire. This will enable the properties form.

The question font can be changed one at a time or as a batch. Checking the checkboxes to the left of question nodes in the design tree will allow the batch option to be used. Change the font in the Question Properties dialog box, and then select Apply To All Checked Nodes in Design Tree on the question property form.

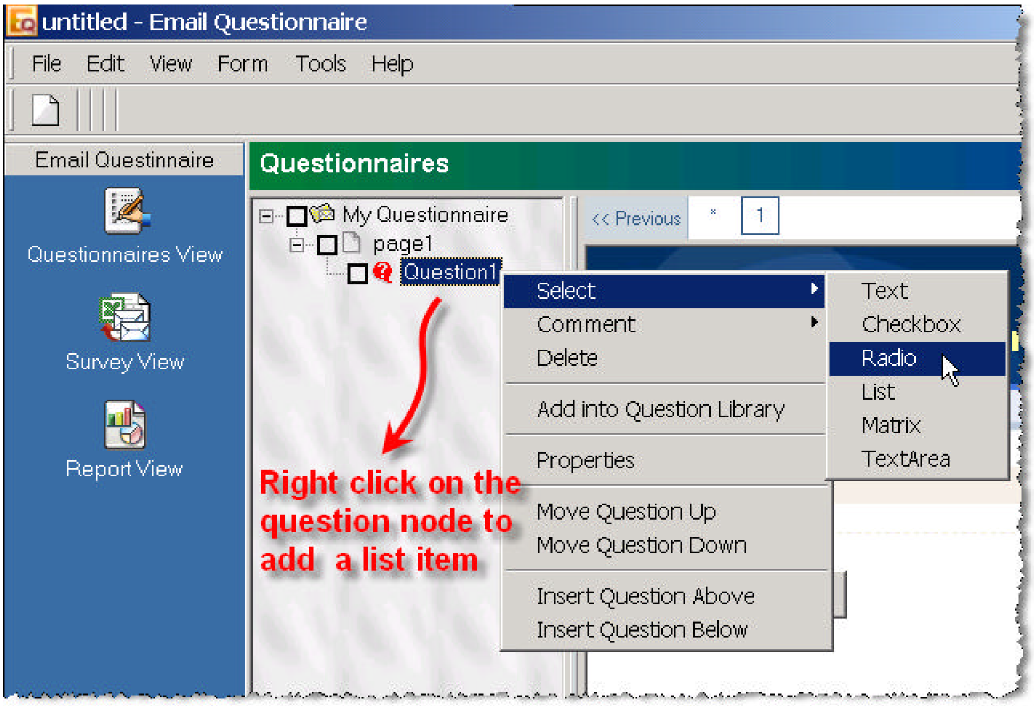
You can adjust the layout of questions by selecting Next To Previous on the Position page in the Question Properties dialog box. Questions will be placed on a horizontal pane next to the previous question. Alignment can align the question in the center, left, or right of the questionnaire.

To edit the question, simply double click it or use the right mouse button on the tree node and select "properties". To delete the question, select Delete after right clicking.

Select Item Creation

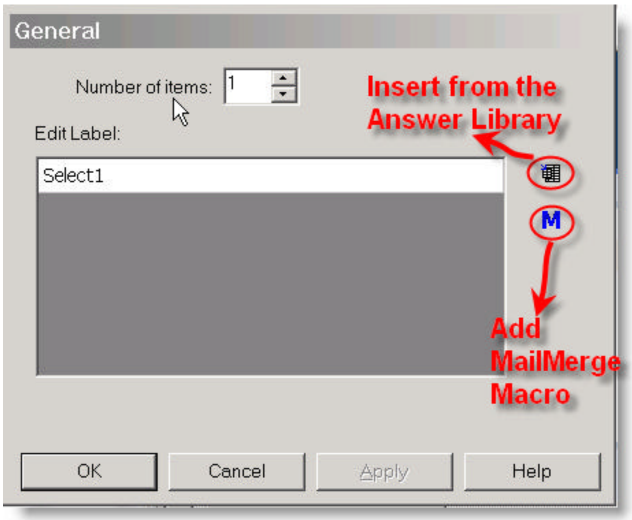
Right click on the question node in the design tree and choose Select from the popup menu. After choosing a select item the Properties dialog box will appear. Most Select items include property pages for General, Font and Position.

Create a select item



List, Checkbox, Radio and Matrix select types can take advantage of the built-in Answer Library to make adding select items easy. You can change the settings of select items at any time by right clicking on the select node and selecting Properties.

Add answers from the Answer Library

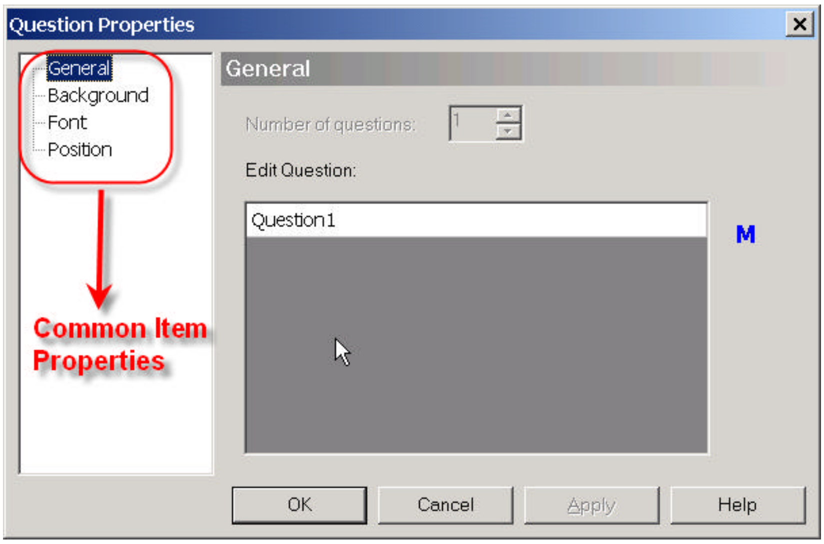


For more information, see Text Properties Setting, Checkbox Properties Setting, Radio Properties Setting, List Properties Setting, Matrix Properties Setting and TextArea Properties Setting.

Common Item Properties

Setting common Select/Question item properties.

Change properties for the common items



General page

Set the description/label for the current item.

Background Page (only for question properties)

Set the background color of the item.

Apply To All Checked Nodes in Design Tree
For Background and Font pages only. Change the font and color for all checked nodes in the design tree.

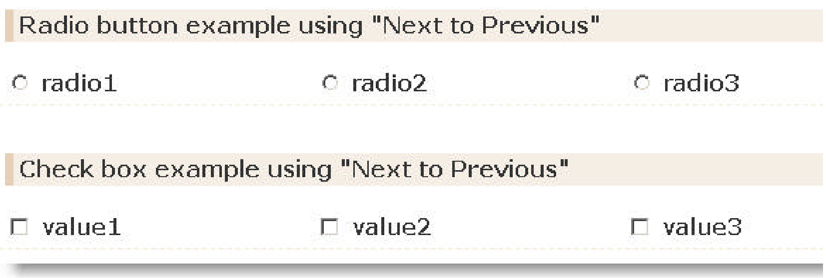
Font Page
Set the font/color for the item.

Apply To All Checked Nodes in Design Tree
For Background and Font pages only. Change the font and color for all checked nodes in the design tree.

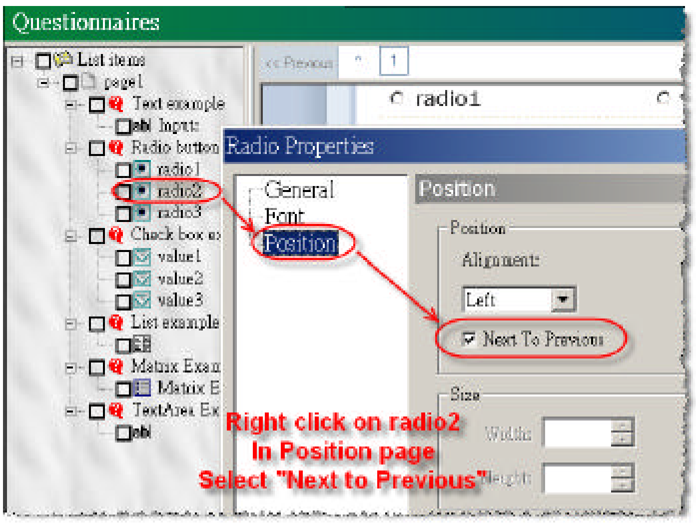
Position Page
Alignment— Align to the center, left or right.

Next To Previous— Place item on horizontal pane next to the previous select item for the current question.

Example of using "Next to Previous"option



Steps to change "Next to Previous" property



Setting Text Properties

Use the General page to set the number of select items and edit their labels. Set the font and color of the label on the Font page. You can also change the font and color of all checked nodes in the design tree. On the Position page, adjust the alignment and layout of select items. Alignment puts the item in the center, left, or to right of the page. Checking Next To Previous will place this select item on horizontal pane next to the previous select item for the current question.

Must have answer — Disable the questionnaire submission if the answer is not filled in.

Setting Checkbox Properties

If the question allows recipients to make multiple choices, you can use the Checkbox select type. You can add up to 10 checkboxes at one time. Or by simply clicking the icon next to Edit Label, an Answer Library dialog box will appear. It lists predefined answer types that if selected will be added to your answers for the current question.

Set the font and color of the label from the Font page. You also can change the font and color of all checked nodes in the design tree. On the Position page, adjust the alignment and layout of select items. Alignment makes the select item appear on the left, right or center of the page. Checking Next To Previous will place this select item on horizontal pane next to the previous select item for the current question.

Setting Radio Properties

If the question allows recipients to make only one choice from a number of possible selections then the Radio select type can be used. You can add up to 10 checkboxes at one time. Or by simply clicking the icon next to Edit Label, an Answer Library dialog box will appear. It lists predefined answer types that if selected will be added to your answers for the current question.

Set the font and color of the label from the Font page. You also can change the font and color of all checked nodes in the design tree. On the Position page, adjust the alignment and layout of select items. Alignment makes the select item appear on the left, right or center of the page. Checking Next To Previous will place this select item on horizontal pane next to the previous select item for the current question.

Setting List Properties

The List select type is similar to the Radio select type in that only one answer from a selection is allowed. However, it has a more compact design that can save space if the number of possible selections is large.

On the General page a label for the list can be entered if desired. Enter list items from the List Items page. Each list item must be entered on a separate line. List items may contain spaces. Or by simply clicking the icon next to Edit Label, an Answer Library dialog box will appear. It lists predefined answer types that if selected will be added to your answers for the current question.

Set the font and color of the label from the Font page. You also can change the font and color of all checked nodes in the design tree. On the Position page, adjust the alignment and layout of select items. Alignment makes the select item appear on the left, right or center of the page. Checking Next To Previous will place this select item on horizontal pane next to the previous select item for the current question.

Setting Matrix Properties

For grouping related questions together the Matrix select type can be used. This type of select item lays out questions in a grid. Up to 100 questions and possible answers for those questions can exist in a matrix at one time.

After adding a matrix it is possible to directly edit the labels for the questions and answers on the property page. The answer type can be either checkboxes or radio buttons. The answer labels can use built-in values by clicking the icon next to the Edit Labels box. An Answer Library dialog box, which includes general answers, will appear. Once selected, the default values of the type selected will be used as labels for the question answers.

Set the font and color of all labels from the Font page. You also can change the font and color of all checked nodes in the design tree.

Setting TextArea Properties

With TextArea, it is possible for the recipient of your questionnaire to type any extended response to a question. For example a comment about something.

Use the General page on the property form to set number of TextArea's and edit their descriptive labels. Set the font and color of the label from the Font page. You also can change the font and color of all checked nodes in the design tree.

On Position property page, adjust the alignment and layout of TextArea item. On the Position page, adjust the alignment and layout of select items. Alignment makes the select item appear on the left, right or center of the page. Checking Next To Previous will place this select item on the horizontal pane next to the previous select item for the current question. The size of the TextArea can be adjusted to suit the questionnaire layout. The dimensions should be specified in pixels.

Must have answer — Disable the questionnaire submission if the answer is not filled in.

Required Response Validation

Required responses validation makes sure that respondents have filled out the surveys correctly. In the survey design phase, the designer can decide if the question must have answer or the answer must have value.

If a question must have answer, at least one of selects under the question node should be answered. Some of select types have "reply must have value" attribute. They can be Text, Checkbox, List, or Multiple Selection. Generally, a checkbox with "reply must have value" is used to make sure that the respondents have read the term and agree it. If required responses aren't answered, a warning message will be shown.

Sending to recipients

After designing the questionnaire you can then send it to recipients. To send the questionnaire use the Send command from the Form menu. To send a new questionnaire the current view must be "Questionnaire view". Each time a questionnaire is dispatched, a new questionnaire database is created.

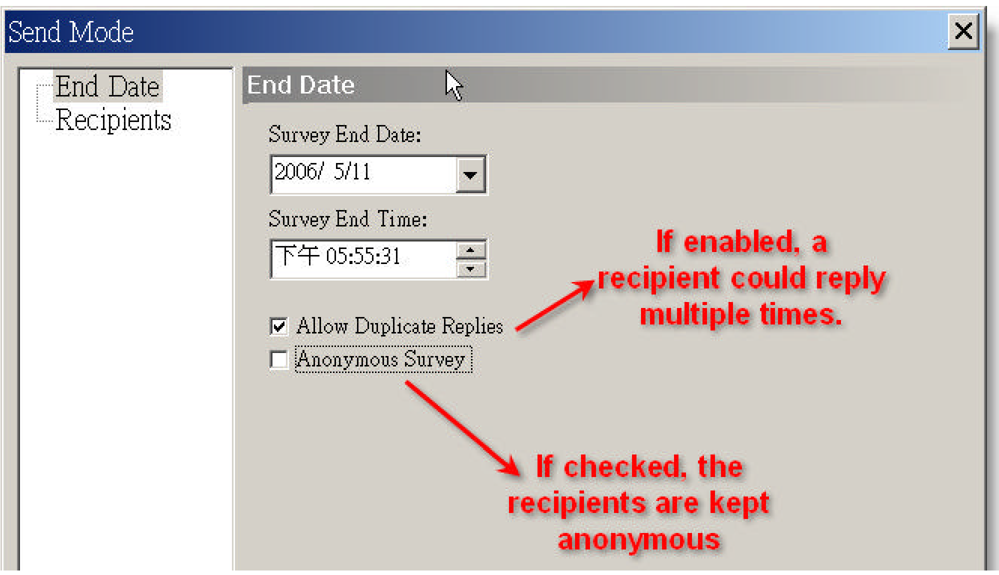
Specify the End Time

Survey End Date/Survey EndTime -- You will need to specify the end time for the questionnaire. As the time expires, all the replies that EQ receives will be dropped. You will not be able to see the result in EQ.

Allow Duplicate Replies – Sometimes the recipient may reply the questionnaire several times. If you would not like this situation to happen, you could uncheck this option. Then EQ only accepts the first reply for each email address. All other replies will be dropped for the same email address.

Anonymous Survey – Some companies may impose restrictions that all recipients should be kept anonymous in the survey. To achieve this, you will need to use Anonymous Survey. All replies will not contain the recipients' email address. EQ will display "anonymity" as recipients' email address in the Anonymous Survey. However, since the replies are anonymous, EQ could not tell one reply from another, therefore, the questionnaire is by default "Allow Duplicate Replies".

Specify the end time of the questionnaire



Select your recipients

There are several file formats that you could import and add as the questionnaire recipients.

Select from Windows Address Book.

Windows Address Book (WAB) is the one that Outlook Express uses. If you are using Outlook Express as your email clients, you could invoke its address book and select the recipients from it.

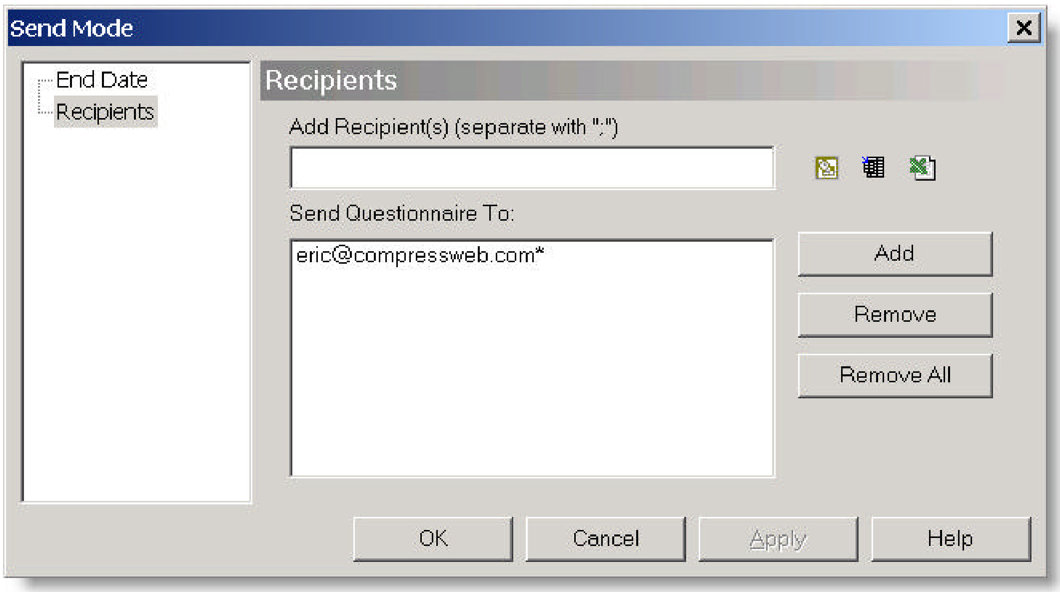
Import from CSV files.

The CSV ("Comma Separated Value") file format is often used to exchange data between disparate applications. Outlook also supports this format, which means you could export your contacts to csv files and import with EQ. You should use CSV files in favor of Excel files since it uses less memory during the import process.

Import from Excel files.

This is the file format used by Excel. Use this file format if you have your email addresses stored in your Excel's worksheets.

Specify the recipients of the questionnaire



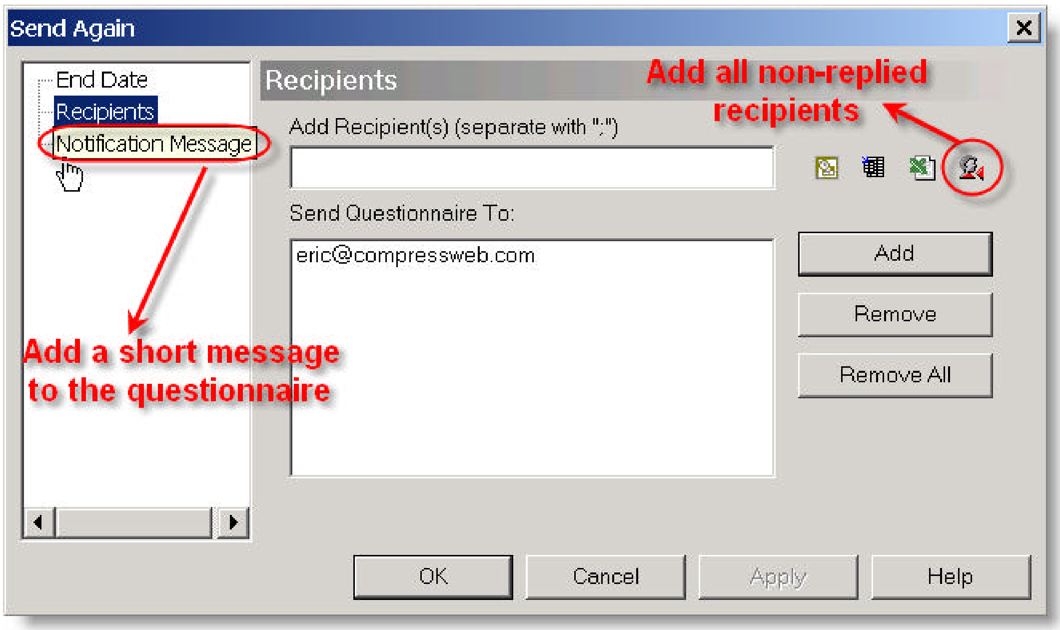
Add more recipients after sending questionnaires

To add more recipients after a questionnaire has already been sent to recipients you must first switch to either Survey or Report views. Then the **Add**

Recipients command can be selected from the Survey or Report menus.

Sometimes you may need to send the questionnaire again since parts of the recipients have not replied yet. You could use "**add all non-replied recipients"** to automatically add all recipients that are not replied yet.

Add more recipient/Re-send after the questionnaire are sent



If you would like to remind the recipients to reply the questionnaire, you could add the message in the "Notification Message" tab. This message will be add into the questionnaire body during the sending process.

Send Format:
There are three kinds of email format that you could choose, MIME, Attach for All or Attach only HTML.

MIME format – By default, EQ will send email in MIME format, except hotmail email accounts. Since hotmail blocks some HTML syntax when users browse their emails, EQ will send questionnaires as attachment.
You could specify a plain text version of the questionnaire in the message window. This will be displayed when the email client cannot render the HTML message, therefore display the plain text version instead.

Attach for All – Attachment in MHTML format

MHTML stands for MIME Encapsulation of Aggregate HTML Documents. Basically, it is a HTML achieve that includes HTML file and its related image files such as JPG/GIF. This format is supported by Internet Explorer 5.0 or above versions. Recipients will need to download it and open with Internet Explorer.

Attach only HTML –- Attachment in HTML format

If your respondent could not view either MIME nor mhtml format, you could send the questionnaire in plain HTML without any embedded graphic file. This is the compatible with all OS platforms, which should work as long as the respondent has a browser installed.

Reply Method:

There are two replying methods that you could use: mailto or compressweb formmail gateway.

The mailto method uses recipients' email clients to send the reply back to the sender. This is generally not reliable since many email clients does not support this syntax, Eudora, for example. Also, some email clients may display strange warnings, which may raise security concerns.

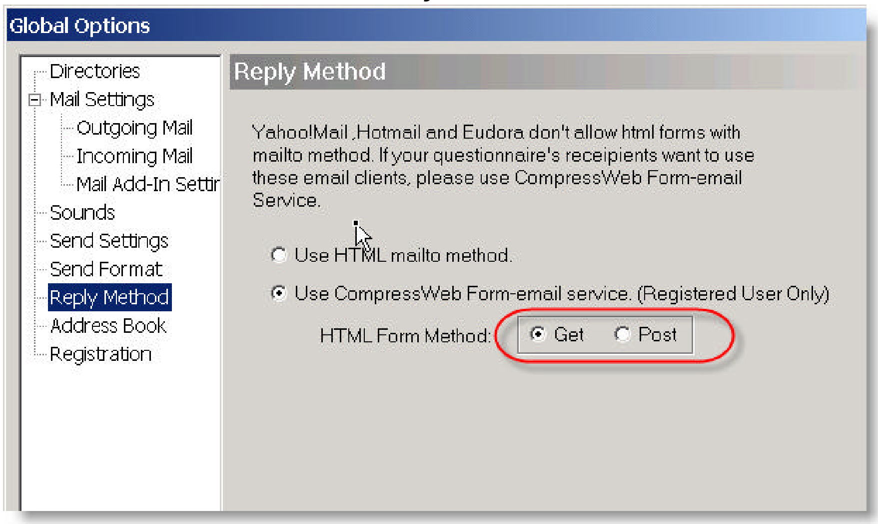
Warning message for the "mailto" reply method

The compressweb formmail gateway avoids the previous problem by using a formmail gateway in remote site. Acting as a CGI program, it redirects the reply to the sender's email account, without using any email clients. This method is generally better.

An additional option is available for Compressweb Form-email service.
If your questionnaire is simple (contain less than 30 questions), or does not

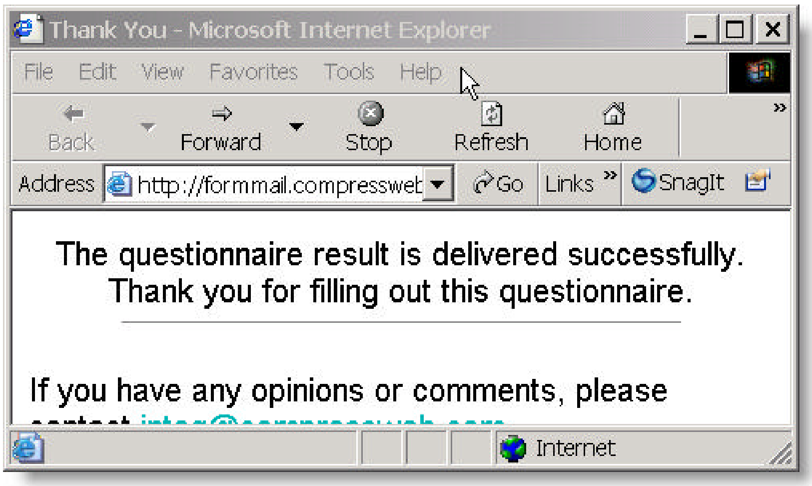
contain lots of textareas, you could use the "Get" method. Since it is limited to 2048 bytes in its response length, do not use it in complex questionnaires. For complex questionnaire, choose "Post" method instead. However, some email clients, like Eudora, does not support this.

Choose "Get" or Post" as your form submission method



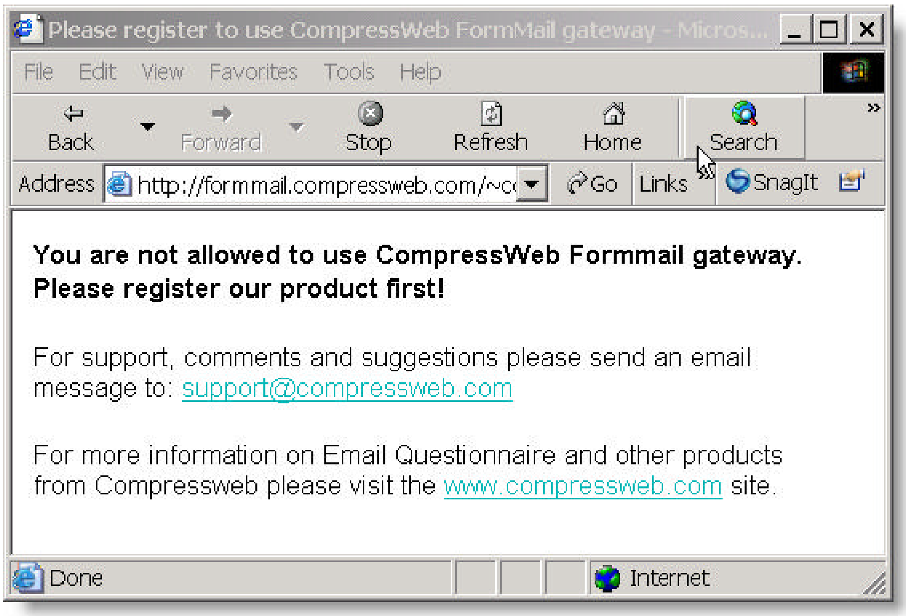
After the submission of the questionnaire, a thank you page will display to notify that the reply is successfully sent.

"Thank you" page displayed after user submit the questionnaire



If your EQ is not registered, the formmail gateway will be disabled after 100 email replies. The submission will result in a warning page to notify you about this.

Warning message for unregistered users

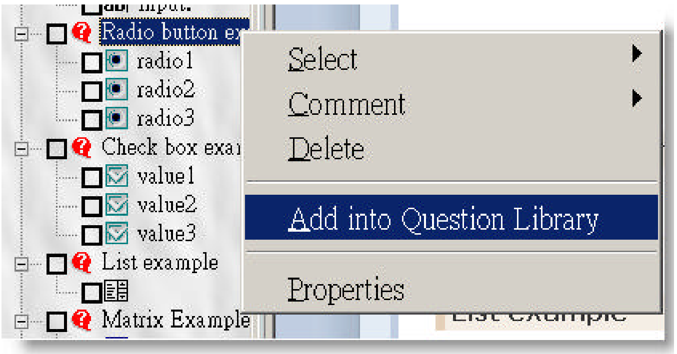


Customization

Question Library

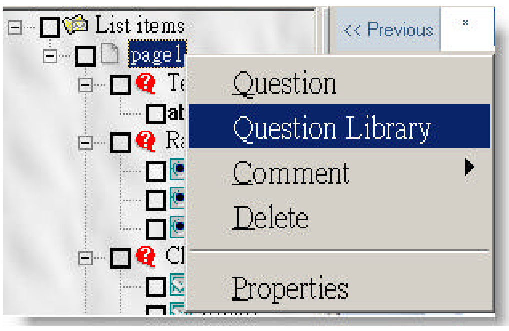
The same questions are often repeated when designing questionnaires. To avoid repeatedly constructing questions, Email Questionnaire allows adding questions to the question library. This can save time by avoiding the need to construct the same question layouts again and again. To add a question to the question library simply right click on the question, then select Add Into Question Library.

Add the question to Question Library



Adding questions from the question library is easy. Right click on the page nodes in the tree layout view and select the Question Library command. You can edit the questions in the question library any time by selecting the Edit User Defined Library command from the file menu.

Insert question from Question Library



Apply HTML Templates

There are dozens of HTML templates available. It can be set in Form menu then choose Apply Template.

Export page to Html

You can also export the questionnaire to html by selecting the asterisk (*) in the panel at the top of the questionnaire layout view. Then from the Form menu select Export Page to Html. Individual pages can be exported by selecting the page number you want rather than the asterisk (all pages).

Sending Mail Merge.

Introduction

Mail merge primarily consists of two major components, the **Main Questionnaire** and the **Data Source**. The Main Questionnaire contains the information that will remain the same in each questionnaire, and the Data Source contains all the variable information, in the form of *fields*. This is the information that will change in the Main Questionnaire when the merge is completed. Along with the information that remains the same, the Main Questionnaire also contains merge fields, which are references to the fields in the Data Source.

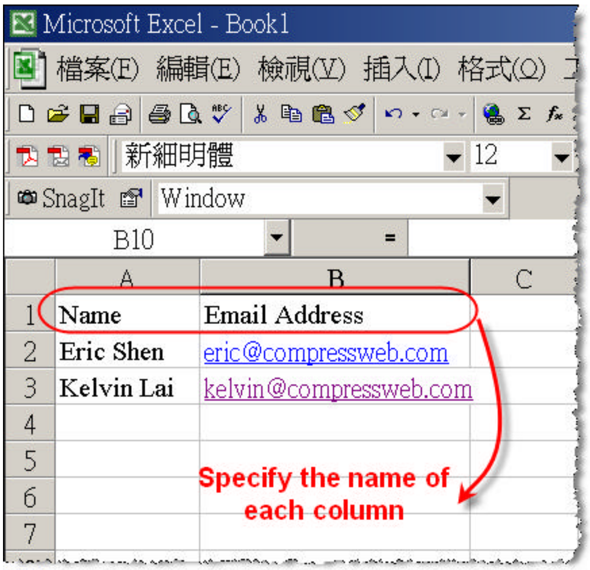
When the Main Questionnaire and Data Source are merged, EQ replaces each merge field in the Main Questionnaire with the data from the respective field contained in the Data Source. The end result is a combination of the Main Questionnaire and Data Source. You can also “preview” the mail merge without actually merging.

Using mail merge function to personalize the message tells your addressee it was meant specifically for him or her. Email merge also reduces the chance that your message will be viewed as spam and deleted unread.

Prepare the Data Source

The data source may be composed in CSV or Excel format. It should contain a table, with rows of items. In addition, it must include a Header Row that specifies the name for each field.
Generally, you do not have to write the Data Source by yourself. EQ supports the format exported by Outlook/Outlook Express.

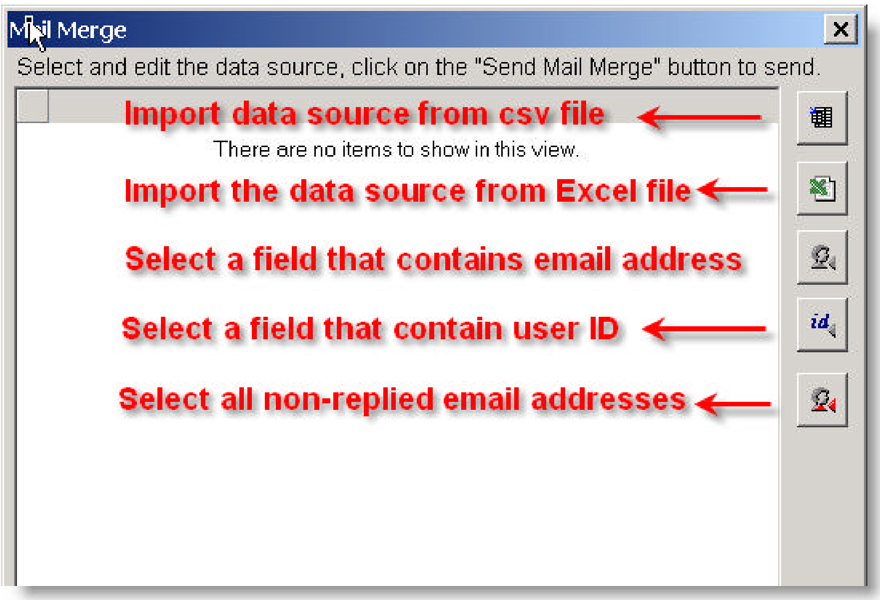
An example of the data source in Excel



Import the Data Source from csv or xls files

After the data source is ready, you could import them into EQ.

Import the data source file



Manipulate the data source

-Insert Data

Insert a new record into the data source.

-Delete Data

Delete the current record from the data source.

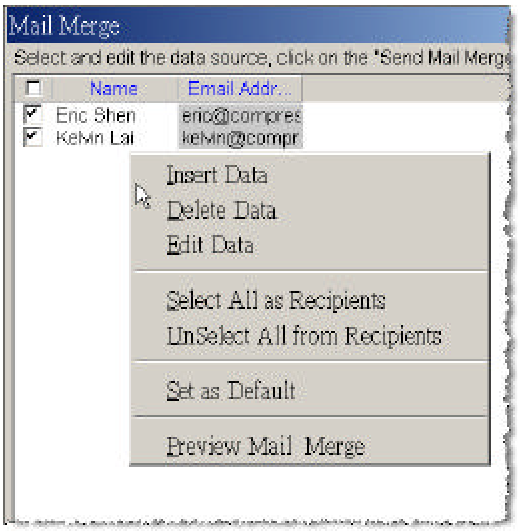
-Edit Data

Edit the current record of the data source.

-Set As Default

Set the current row as the default values of the data source.

Manipulate the data source

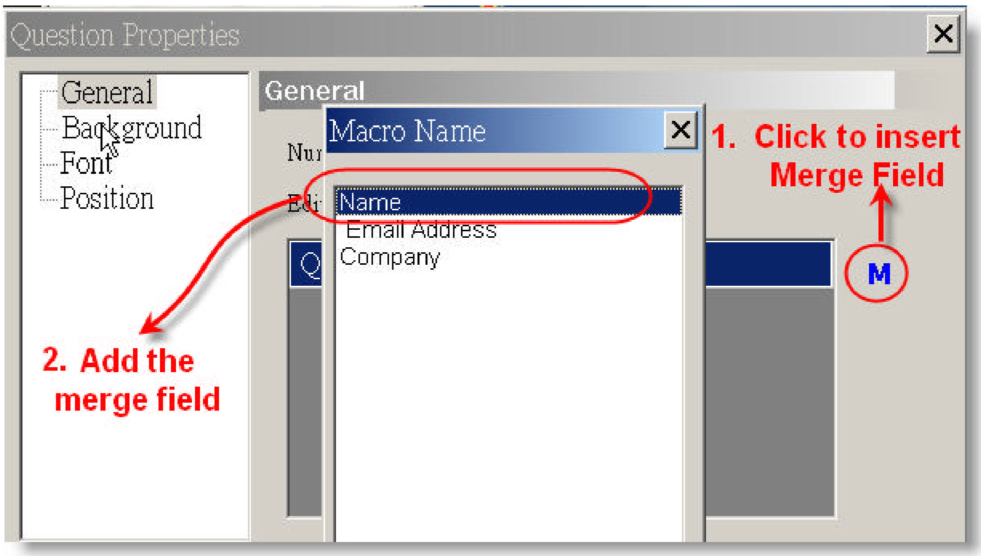


Prepare the Main Questionnaire

After the data source is ready, you could start to prepare your questionnaire for mail merge. You will need to add merge fields to places that need personal information.

When you are adding a question/list item, there will be a Merge Field button to let you insert the Merge Field to your questionnaire.

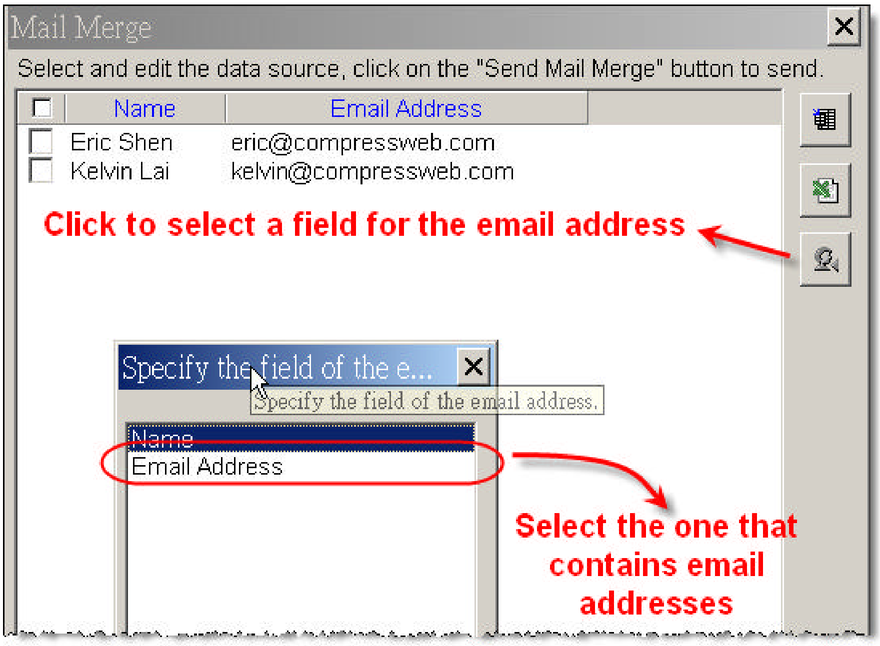
Insert the Merge Field



Specify the "email address" field

Among the fields of the Header Row, one of them represents the email address. However, EQ does not posses such knowledge. Therefore, you will need to specify the very field for EQ in order to extract the email addresses.

Specify the "email address" field



Specify the "ID" field

Sometimes you may send several questionnaires to the same email address. In this way, you could not judge by the returned email address to know which questionnaire has been replied.

You could embed for each questionnaire a specific id, and EQ will pass this id along the questionnaire. You could then judge by this id to know which questionnaire has been replied.

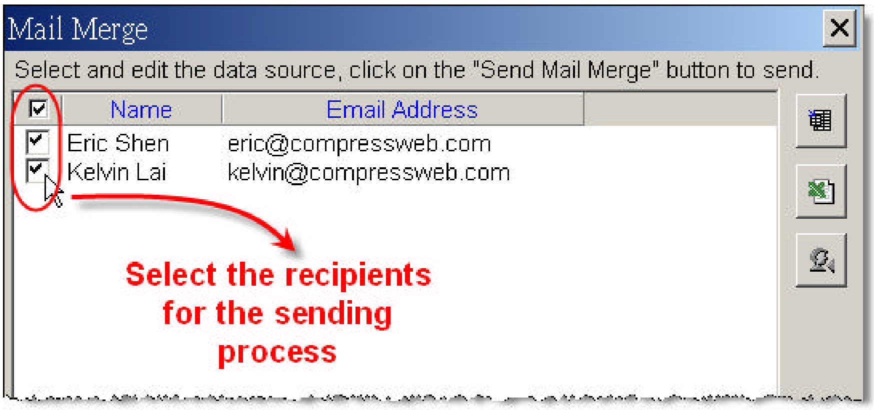
Preview mail merge

You can preview your data prior to performing the merge by clicking the **Preview Mail Merge** on the mail merge pop-up dialog.

Select the recipients.

Before sending mail merge, you must select the recipients from the Mail Merge dialog.

Select the recipients



Sending mail merge

Click on the " Send" button to send out the questionnaires.

Send Mail Merge

Add more recipients for the mail merge

After a questionnaire has been sent successfully, you will not be able to add more recipients from the Questionnaire View. You will need to go to Survey View and from Menu, Choose Survey=>Add Recipients.

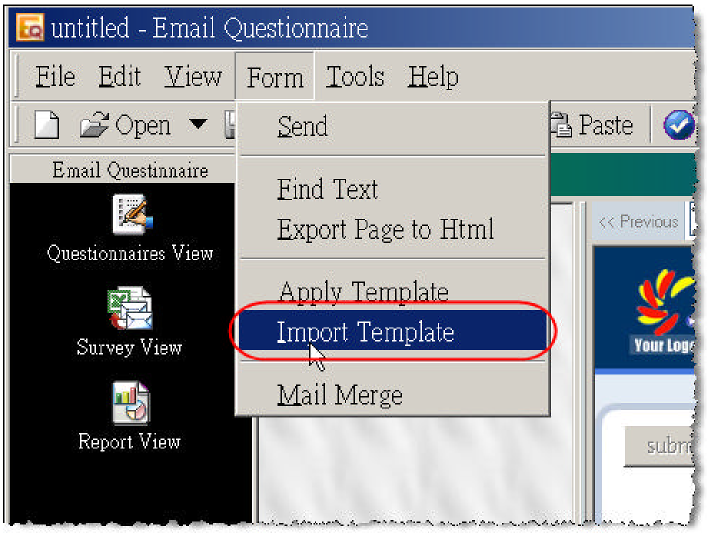
You could click on the "**Add all non-replies recipients**" to fasten the process. All recipients that have not replied yet will be selected.

Import HTML templates

EQ could import HTML files from your disk as HTML templates. However, there are several limitations regarding how the HTML is composed:
-Cannot use external CSS (Cascading Style Sheets) files.
-Cannot use Javascript.
Also, you will need to add a tag manually in order to notify EQ to place the questionnaire generated. The special tag is **[# Insert_Questionnaire #]**.
EQ will look for the tag in the template; replace it with the questionnaire while keeping all the style/font settings in the template intact.
If successful, the new template will be placed along with other templates. You could then choose Apply Template to use the new template.

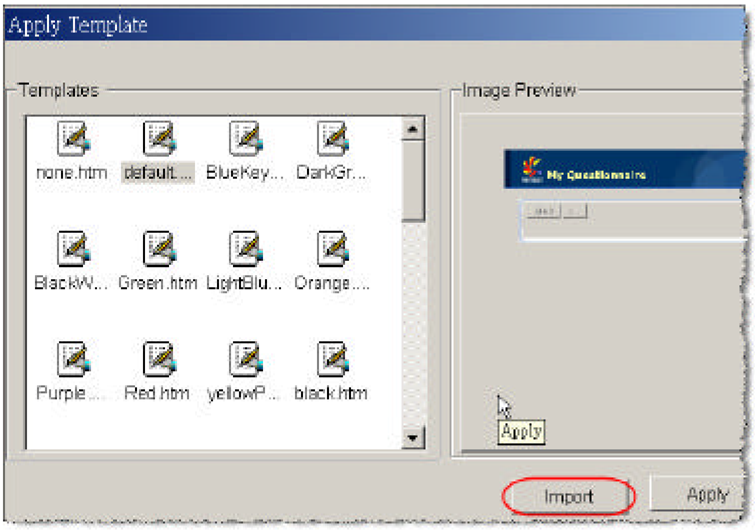
There are two ways to import HTML template.
From Menu, Form=>Apply Template

Import HTML Template



From Menu, Form=>Import Templates

Import HTML Template



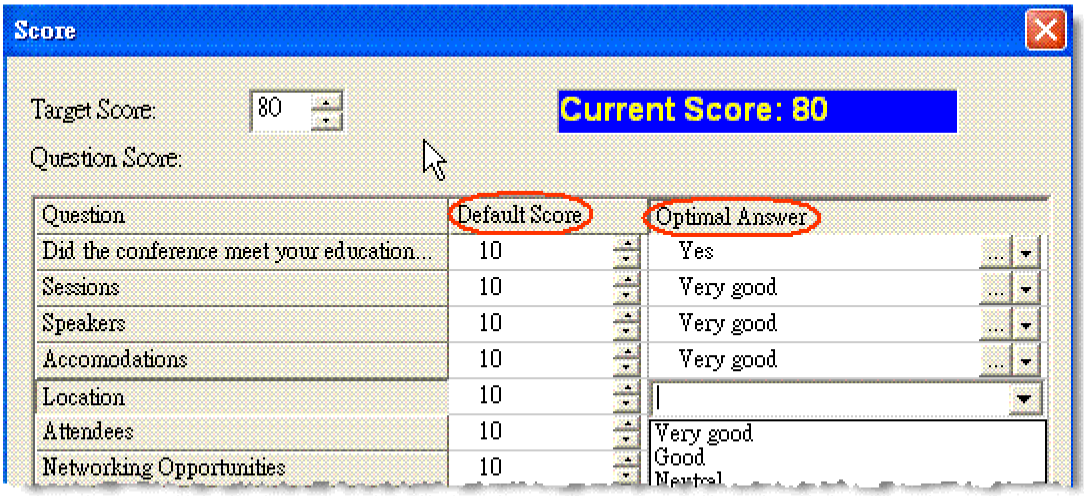
Scores Feature

In addition to feedback collection, you might need quantitative evaluation of study, course, satisfaction, performance, service, health or personality profile. Score feature provides an efficient index for survey designer. With setup scores, evaluation forms can be easily conducted. To setup score, use the Setup Score command from Form menu in Questionnaire view.

Specify default scores and optimal answers

All questions of the current questionnaire are listed in the Score dialog. For each question, you can specify a default score and optimal response. **Default Score** is the maximum value the question can get. **Optimal Answer** is generally the correct or optimal response to the question, and assigned the default score.

Specity default scores and optimal answers

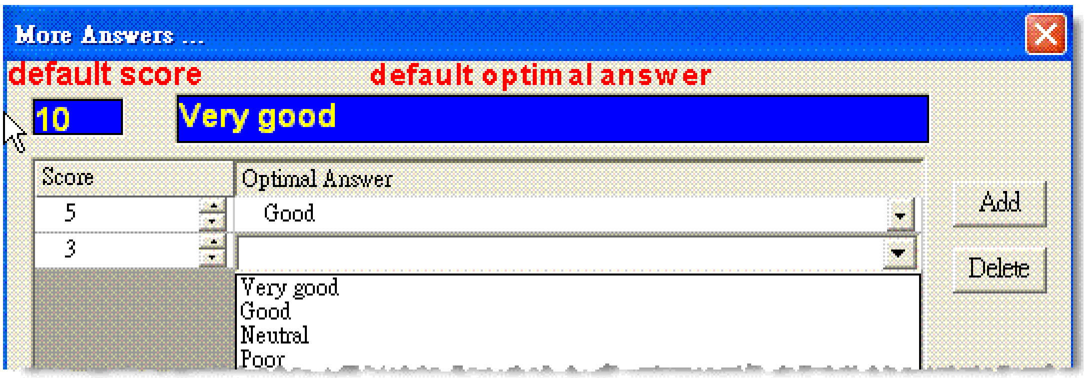


Once a value is set, all assigned default scores will be automatically summed and displayed as the **current score**. **Target score** finally should be equal to current score, or the background color of current score will change from blue to red.

Add more answers setting

Each question can have more answers and is allowed to setup scores for each answer. In More Answers dialog, the default score value and optimal answer if any are shown in the top of the window. Then add as many score assignments as preferred answers. For each assignment, the score value can't be greater than the default score.

Add more answers setting



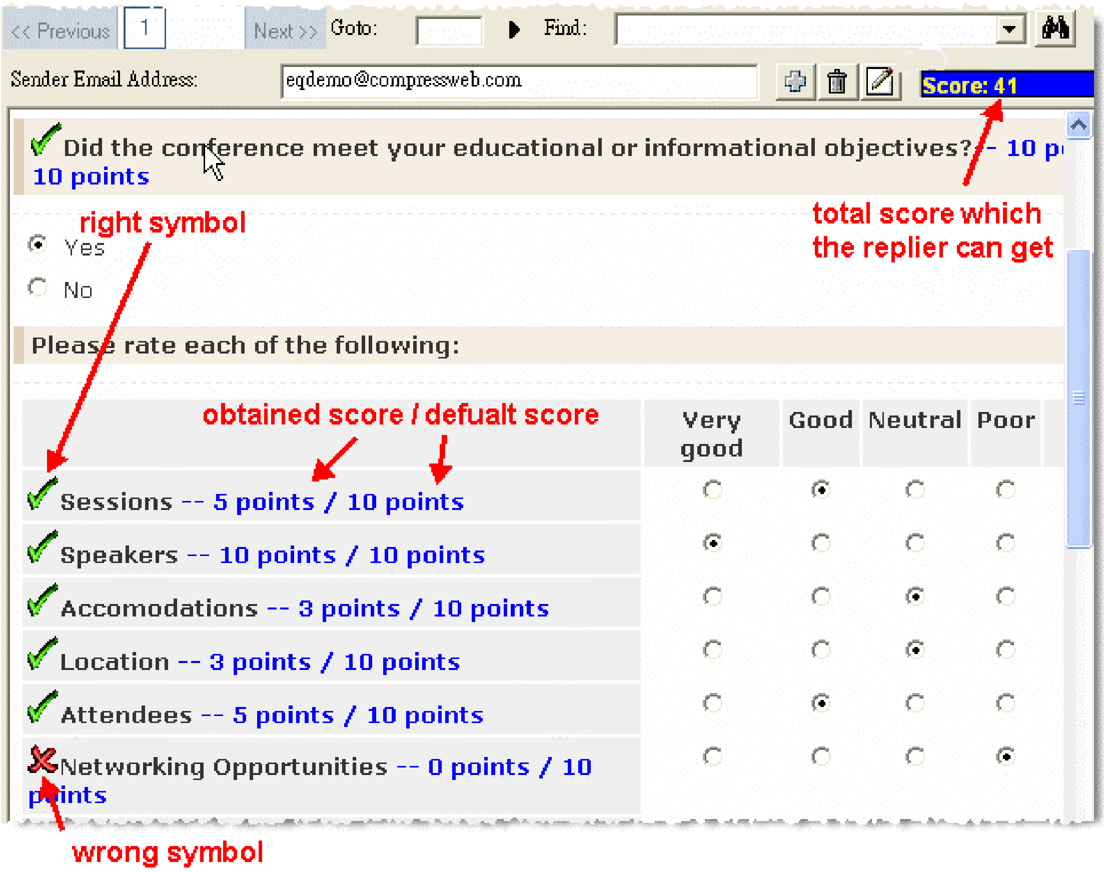
Score the replies of survey participants

Based on individual question scores and optimal answers assignment, Email Questionnaire compares actual responses with to derive the score.

For each question, any responses matching to the assigned answer options can have an associative score value. The highest one of them is regarded as the actual score that the question gets. A sum of each question score is the total score the participant can get. The calculated score is integrated into the score column of the reply table in Survey View.

In Data View, an individual view of recipients' replies is exactly presented. Each question is annotated with correct or wrong symbol, and the obtained score/default score. The question responses including one of assigned answer options will be marked a right symbol, or wrong symbol.

Scores in Data View



Survey View

All questionnaires active and finished are listed in the top window of the Survey View. The survey title, end time, open period and total number of replies are listed. Selecting a questionnaire will show the recipients in the right hand window.

Collect Replies

Choose Remove Survey from Survey menu, or icon on the toolbar. This will collect email replies directly from the POP3 mail server or from Outlook Express assuming these questionnaire response retrieval methods have been enabled from the Tools/Options menu command.

Remove selected Replies

Sometimes, you may have some testing or duplicate replies in the questionnaire result. You could delete them in the Survey View.
For each reply, it has a checkbox in front of it. If you want to remove the specific reply, first check on the reply then from EQ Menu, Survey=>Remove selected replies.

Adding Recipients

Choose **Add Recipients** from **Survey** menu or the **Add Recipient** icon on the toolbar. The Send Again dialog will appear. You can also right click on the questionnaire and select **Add Recipients**.

Use the Recipients page to add new or resend to existing questionnaire recipients. This can be done any time after a questionnaire has been dispatched. Pressing Ok will send the questionnaire to the email addresses listed in the recipient list that are marked with an asterisk (*). Once sent, a sent notification will be displayed. If the questionnaire contains many images the upload time to the SMTP mail server may take a while.

Extend End Time

Choose **Extend End Time** from **Survey** menu or icon on the toolbar. You can also right click on the questionnaire and chose the **Extend End Time** command.

Use the End Date page to set the survey end date and if multiple replies from the same recipient are allowed.

Export to Excel/CSV files

Choose **Export** from **Survey** menu, there are two options, **Excel** or **Tab Delimited files**.

Stop Survey

Choose **Stop Survey** from **Survey** menu, or right click on the questionnaire and select **Stop Survey**.
The survey can be stopped before its scheduled end time. All questionnaires can be extended when completed or prematurely halted. Refer to the **Extend End Time** command.

Delete Survey

Choose **Delete Survey** from **Survey** menu, or right click on the questionnaire and select **Remove Survey**.
Use this command to remove the survey if it is no longer required. Once deleted, you could still see the deleted survey using “Display deleted survey”. However, if you choose to delete a previously deleted survey, it will be deleted permanently.

Undelete Survey

Use this command to undelete a survey.

Display deleted survey

Use this command to see all surveys including deleted ones.

Report View

After dispatching the questionnaire, recipients will fill out the form and submit the reply via the submit button on the questionnaire form. Replies will automatically be collected by Email Questionnaire and added to the result database. Before Email Questionnaire can gather replies the mail server options need to be correctly set. See Mail Settings, Send Format and Reply Method for more information on how to do this.

EQ can read the replies directly from the POP3 mail server. See the Tools/options menu command. Then select the Mail Settings/Incoming Mail property page. The polling frequency can be set from this page. In addition, Email Questionnaire can read questionnaire replies from popular email clients. Currently Outlook, Outlook Express and Eudora are supported. See the Mail Add-In property page.

If Outlook or Eudora is used, replies will be automatically redirected to EQ when they arrive to your inbox.

If Outlook Express is used, EQ will periodically poll Outlook Express mailbox for questionnaire replies.

Clicking Collect Replies on the toolbar will poll the pop3 mail server or Outlook Express for replies assuming these retrieval methods are used. Using Collect Replies on Survey/Report menu in Survey/Report view has the same effect.

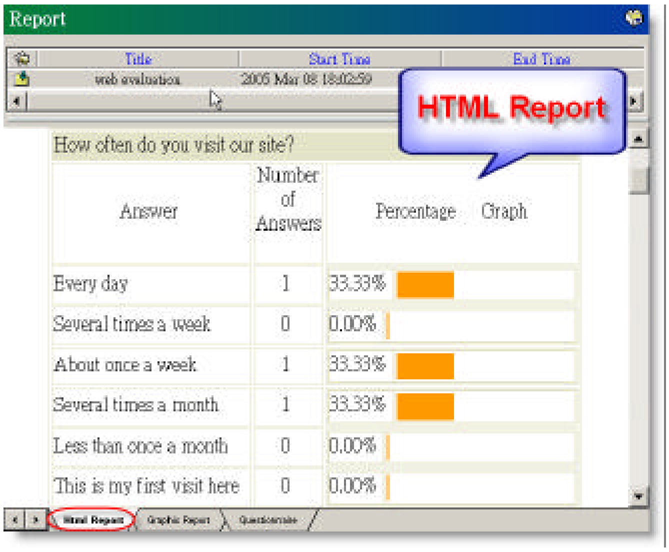
Selecting a questionnaire in the Survey or Report view will display the results in either a tabular view or a report view. The Survey view will contain each reply received, the individual responses to each question are shown. One row in the grid corresponds to one reply to the questionnaire. You can export the data to Excel or a tab delimited text file format for further analysis. To use this feature switch to either the Survey or Report view and choose the Export command from the Survey or Report menu.

The Report view shows a summary of the replies received. It provides a graphical HTML based report. After selecting a questionnaire, the real-time online report is displayed for that questionnaire. The report is constantly updated as questionnaire responses are received by Email questionnaire. The type of chart (bar, chart …) shown can be changed from the Report/Chart menu. Use the Export Report To HTML command from the Report menu to export the report from the Email Questionnaire database.

HTML report

Display the questionnaire result in HTML format.

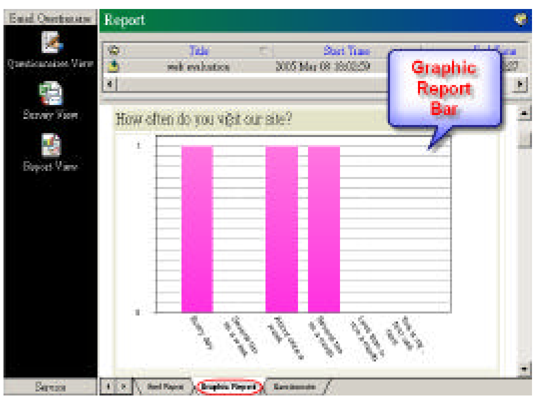
HTML report example



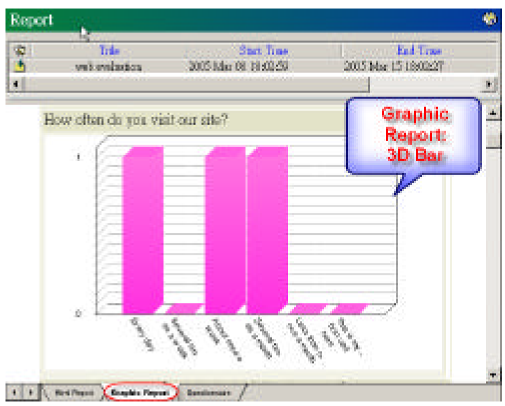
Graphic Report

There are several kinds of graphic reports that you could use. This could be changed in Report/Chart menu. The available options are: Bar, Bar3D, Pie, Pie3D, Line, Line3D.

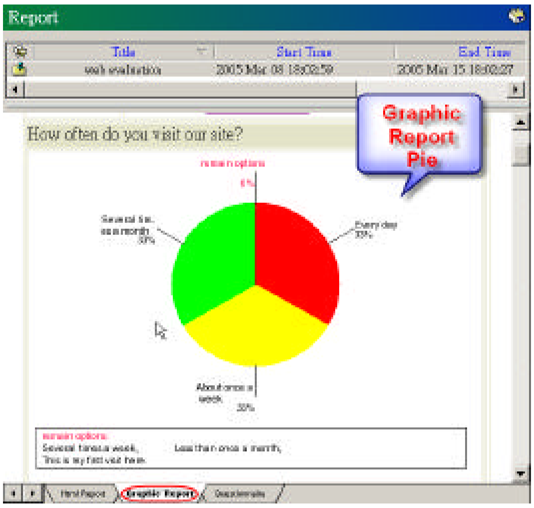
Bar



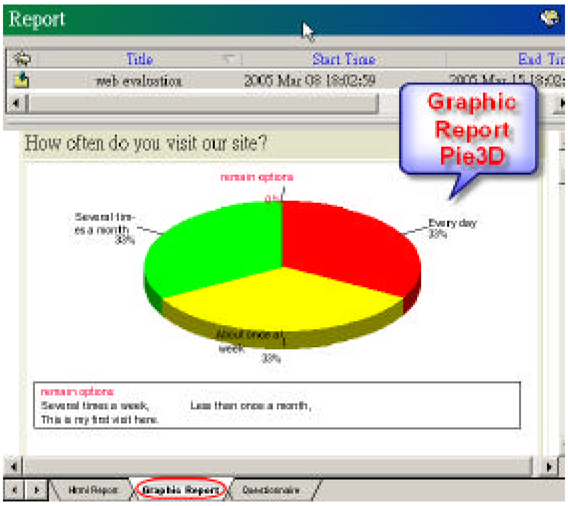
Bar3D



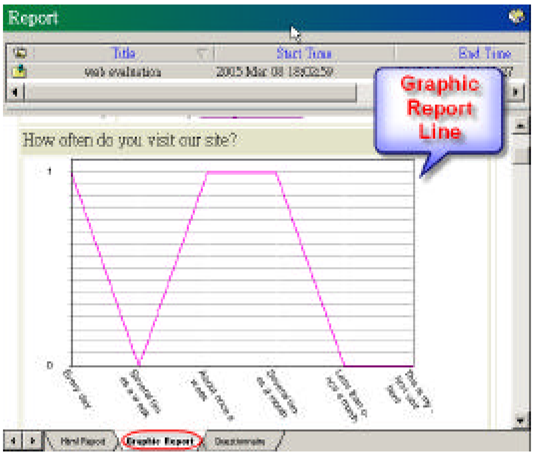
Pie



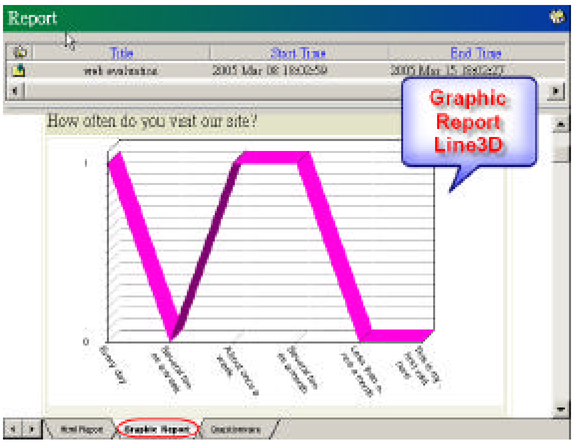
Pie3D



Line



Line3D



Data View

Data View provides the capability to recreate the orignial questionnaire submission. In addition to the questionnaire body, Data View combines the questoinnaire reply and displays the same output just before the recipient submits. You could then print or save the submission.

A navigation control panel is provided in the Data View. You could use the panel to browse through the submissions, search for a specific reply. You could also manipulate the replies using the insert/delete/update buttons.

Add Reply

Choose **Add Reply** from the Data menu, or the icon on the work area.

This will add a blank reply to the result database. If you are conducting a phone survey, or you need to enter the survey result manually, you will need to add a reply first. The new reply will be place in the 1st in the result database.

Delete Reply

Choose **Delete Reply** from the Data menu, or the icon on the work area.

This will delete the selected reply. A dialog will be presented to ask you whether you want to remove this reply or not. Once deleted, the reply could not be recovered.

Update Reply

Choose the icon on the control panel.

When you need to modify the reply, you will need to first answer the questionnaire as usual. After that all answers have been entered, instead of clicking on the submit button in the questionnaire, click on the update button in the control panel to commit the changes. If there is any field that has the "must have answer" property enabled, you will need to enter the answers before you could update the reply.

Goto Reply

Choose **Goto Reply** from the Data menu, or the icon on the work area.

This allows you to jump to a specific reply instantly.

Find Reply

Enter the email address that you are looking for, then click the icon to find.

When there are huge amount of replies in the result database, Find Reply helps you to locate specific reply quickly. The search string you entered could use wildcards to represent any characters.

A wildcard is a character that may be used in a search term to represent one or more other characters. The two most commonly used wildcards are the question mark ("?") and an asterisk ("*").
The question mark ("?") may be used to represent a single alphanumeric character in a search expression. For example, searching for the term "ho?se" would yield results which contain such words as "house" and "horse".
An asterisk ("*") may be used to specify zero or more alphanumeric characters. For example, searching for the term "h*s" would yield results which contain such words as "his", "homes", "houses".

Export the result to HTML

Choose **Export Data to HTML** from the Data menu.

After viewing the individual reply, you could choose to save it to disk, then send it to others or backup it for later use.

Print the result in HTML

Choose **Print** from the File menu.

Since the Data View provides the same output as recipient's submission, you could print the result to in order to have further processing.

Command Reference

Menus

Files menu:

New	Create a new questionnaire
Open	Open an existing questionnaire
Save	Save the opened questionnaire with its current file name
Save As	Save the opened questionnaire with a specified file name
Edit User Defined Question Library	Edit user defined questions in the library
Print	Print the view in the main window
Print Preview	Display the view as it would appear when printed
Print Setup	Select a printer and a printer connection
Exit	Exit Email Questionnaire

Edit menu:

Copy	Copy questionnaire components
Paste	Paste questionnaire components

View menu:

Toolbars	Manage the toolbar by Toolbar command
Views	Switch to different view (Questionnaire View, Survey View, Report View and Data View)
Work Space	Show or hide the work space
Status Bar	Show or hide the status bar

Tools menu: Configuring Email Questionnaire.

Options …	Global Options setting

Help menu: Getting help and information.

Help Topics	Offers you an index to topics on which you can get help
Online Help	Get more information in our website
Online Support	Send an email to the product supporter
About	Display the version number of this application

Form/Survey/Report menus

Form menu: Only displays in Questionnaire view.

Send	Set survey end date and recipients
Find Text	Find text in the content of the questionnaire
Export Page to Html	Export the page you see in main window to html file
Insert Template …	Set the background of the questionnaire. See Insert Template Properties for more information

Survey menu: Only displays in Survey view

Export	Export replies to Excel file or CSV file. See Export Replies for more information.
Collect Replies	Check for replies from pop3 server or Outlook Express immediately
Add Recipients	Send the currently active survey to new recipients not in the original recipient list
Extend End Time	Extend the survey end time
Stop Survey	Stop to accept replies of the currently active survey
Remove Survey	Remove the replies from database

Report menu: Only displays in Report view.

Chart	Select the presentation format of Graphic Report
Export Report to Html	Export report to html file
Collect Replies	Collect replies from pop3 server or Outlook Express immediately
Add Recipients	Send the currently active survey to new recipients not in the original recipient list.
Extend End Time	Extend the survey end time
Stop Survey	Stop to accept replies
Remove Survey	Remove the replies from database