Email Questionnaire 4.0

Setup Guide

2006/4/14

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.

Before using Email Questionnaire for the first time, some one-time options need to be setup. This document details how to configure Email Questionnaire.

Directories

Reply Directory

Reply Directory is the disk location where the reply database for each questionnaire will be stored. Usually there is no need to change this setting. Email Questionnaire uses this directory when locating the reply database for questionnaires. Each questionnaire has one associated rdb (result database) file.
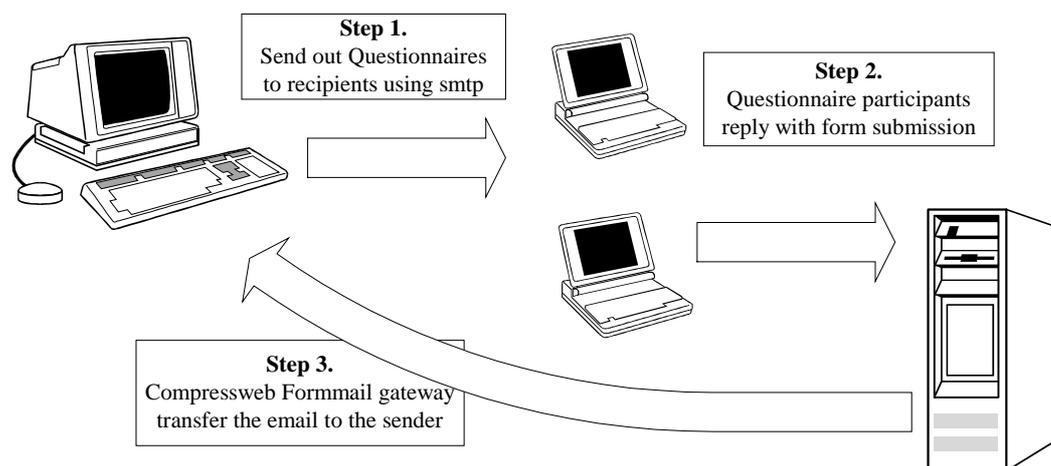
If you are upgrading to newer version of EQ, you probably will need to backup this directory in case the newer version does not work. You could either use winzip to achieve them to a file, or use Windows Explorer to copy this directory to other places.

Set the Reply Directory

Mail Settings

EQ uses your local email system for conducting questionnaires. It is very important that you have the correct mail settings for EQ to function correctly. Before beginning configuration, it may be helpful to know how EQ works. Please see the diagram below:

Step 1.
Send out Questionnaires to recipients using smtp

Step 2.
Questionnaire participants reply with form submission

Step 3.
Compressweb Formmail gateway transfer the email to the sender

Basically, there are three steps to conduct an email questionnaire survey.

- The questionnaire is first sent out using your SMTP mail server.
  - A SMTP server must be specified to deliver your email.
  - A batch mode of processing is possible to speed up the emailing process.
  - The questionnaire can be dispatched as either a MIME encoded message, or as a mhtml attachment.
- The questionnaire participants receive and browse the questionnaires and reply to the compressweb formmail gateway.
  - The questionnaire participants may use different email clients to view the questionnaire. For example, Outlook/Outlook Express/Eudora/Yahoo/Hotmail/Gmail.
- The compressweb formmail gateway forwards the reply to your email account.
  - The email forwarding automatically takes place when the questionnaire recipient presses the submit button on the questionnaire form.
  - It is then possible to retrieve the email replies using Outlook/Outlook Express/Eudora/Pop3. EQ will automatically locate replies and add them to the EQ report database.

Outgoing Mail Settings

Sender Email Address:
Before sending a questionnaire to recipients you must first tell EQ your email address. When a recipient replies to your questionnaire the reply will be sent to this address. For example, support@compressweb.com .
If you use SMTP Server to send your questionnaire, this would also appear as the sender in the email. If you are using Exchange Server, the sender appear in the email is specified in the account in your Outlook.

Server Type:
EQ supports both Microsoft Exchange Server and standard SMTP Server.
For Microsoft Exchange Server, the versions supported are Exchange 5.5 sp4, Exchange 2000, Exchange 2003. You must also have Outlook installed in your computer in order to send the questionnaire through the Exchange server. The Outlook versions supported are Outlook 2000, Outlook 2002, and Outlook 2003.

Exchange Server Settings:
For the Exchange Server, you do not need to specify your email account/server in EQ.   However, you will need to make sure that your Exchange Profile in Outlook is working.
If you are using Microsoft Exchange Server 5.5, EQ only supports the service pack 4 (sp4). Also, you will need to turn on the HTML sending capability of your server.
If you are using Outlook 2000, EQ will only work in the Corporation Mode, not the Internet Mail Mode.
If you are using Outlook 2002/XP/2003, EQ will work as long as the Microsoft Exchange Server account in your profile is configured correctly.

SMTP Server Settings:

Server
For the SMTP servers, you need to set a mail server for sending questionnaires. This must point to a valid SMTP server, otherwise questionnaires cannot be sent.

Server Port

Specify the connection port of the SMTP server. The default setting is 25.

Server Needs Authentication

Some SMTP servers require authentication. Unless your IT specialist or ISP vendor notify you to that authentication is required please do not use this option. The fields can be left blank.

Configure your Outgoing Mail before sending your questionnaires
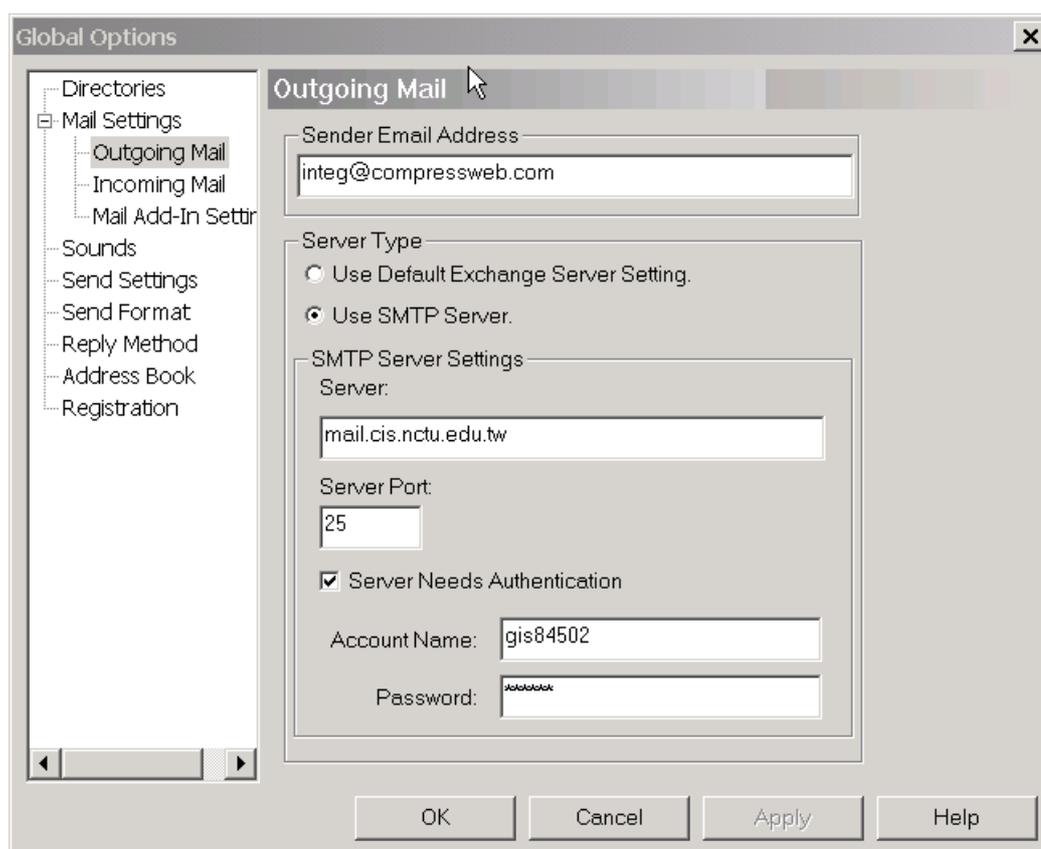
Incoming Mail Settings

EQ needs to gather questionnaire replies from either **Mail client Add-ins**, or from a **POP3 mail server** directly. You must configure at least one of these for EQ to work correctly. It is probably best to choose a mail add-in first, since it is more intuitive and is easy to setup.

Please refer to the following chart for an illustration of the different techniques EQ uses to get incoming emails:
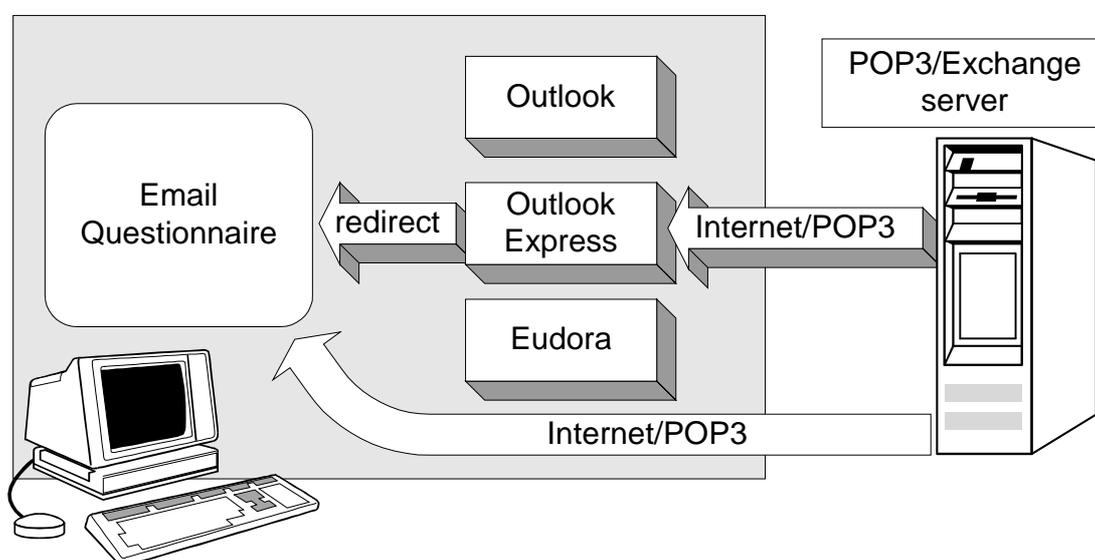

Enable POP3 Access

If selected, Email Questionnaire will read the replies directly from the pop3 mail server. Once read, the replies are deleted from the server. This is a good method to use if you set up a dedicated mail account just for Email Questionnaire use.

Warning: If using the POP3 method for questionnaire reply retrieval and the Sender Email Address is the same account used for your normal email usage then your email client may download the questionnaire replies before EQ has a chance to retrieve them from the POP3 server. Unless one of the Mail Add-In reply retrieval methods is enabled the reply may be lost.

Host is a pop3 mail server address. User and Password are for the pop3

account, which should match the sender's email address. The polling frequency can be set as desired.

Configure EQ to retrieve replies directly through a POP3 Server
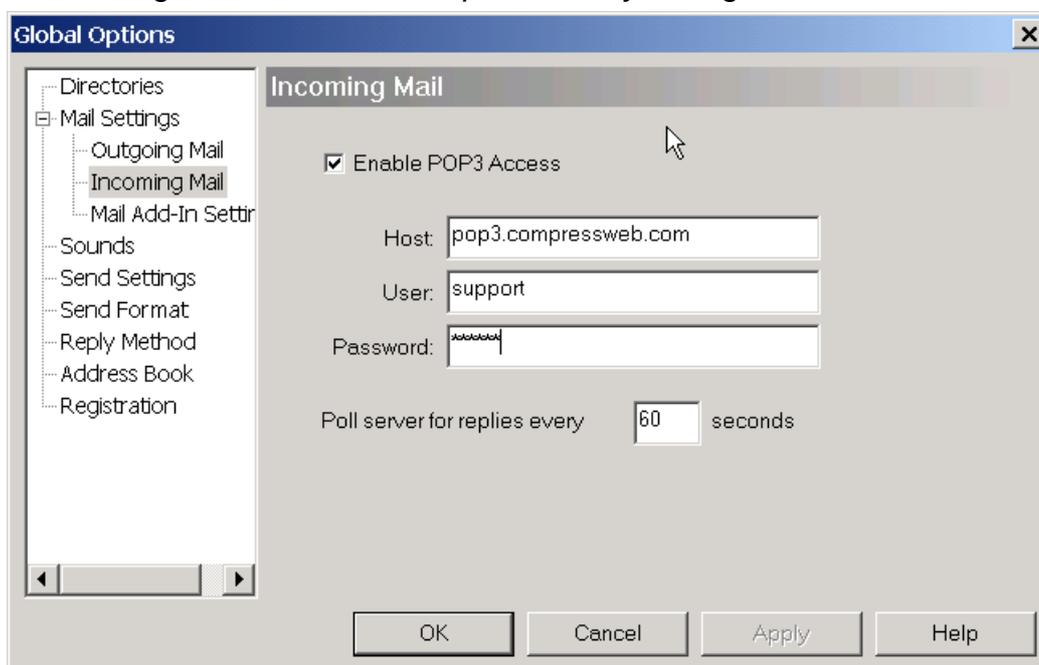
Host
The pop3 mail server address.

User
The user name of the account to be used. Note if this option is used the account should match the sender's email address.

Password
Password for the user pop3 account.

Poll server
The pop3 polling frequency for questionnaire replies.

From the menu: Tools -> Options -> Mail Settings -> Incoming Mail page

Mail Add-In Settings

EQ needs to get questionnaire replies either from your mail client via one of the Mail Add-in methods, or directly from a POP3 mail server. You must configure one of them for EQ to work correctly.

Configure how you retrieve the replies from your email clients
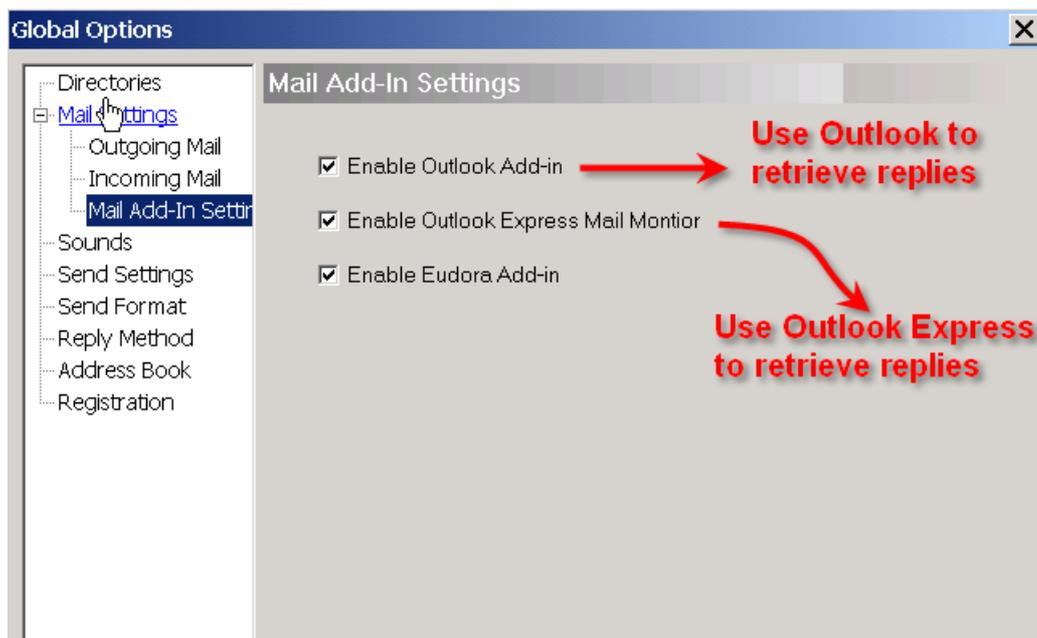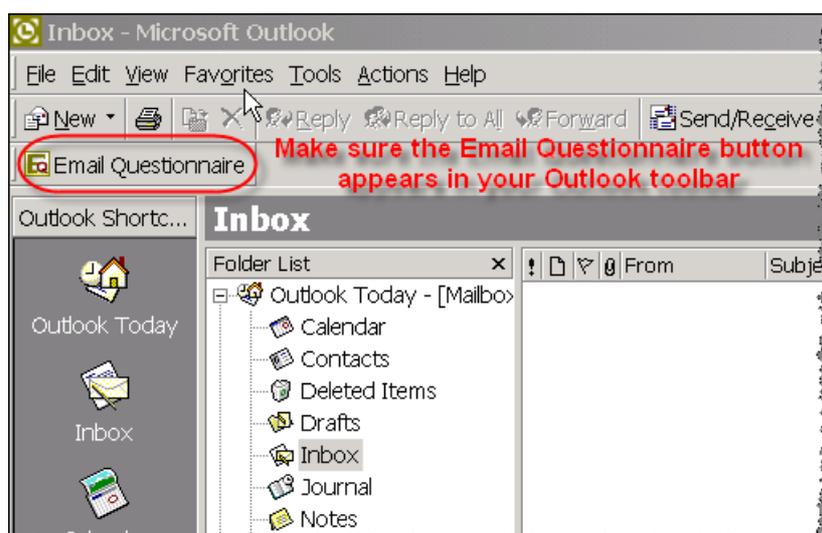

Enable Outlook Add-in

If selected, the Outlook mail client will automatically redirect questionnaire replies to Email Questionnaire. The replies will then be moved to the "deleted folder" from Outlook. This happens as the questionnaire replies are downloaded to Outlook.

Note: For this option to work the Email Questionnaire add-in for Outlook must be installed. This is done during installation and after EQ is run for the first time. If installed correctly a new tool bar with an Email Questionnaire button will appear when Outlook is started.

Make sure that the Email Questionnaire button appears in your Outlook toolbar

If you do not see the button appear in your toolbar, please check your Outlook settings in Outlook Menu, (**T**)ools=>(**O**)ptions, Others tab, Advance Options=>Add-in Manager. Make sure that the "Email Questionnaire Outlook Add-in" is selected.

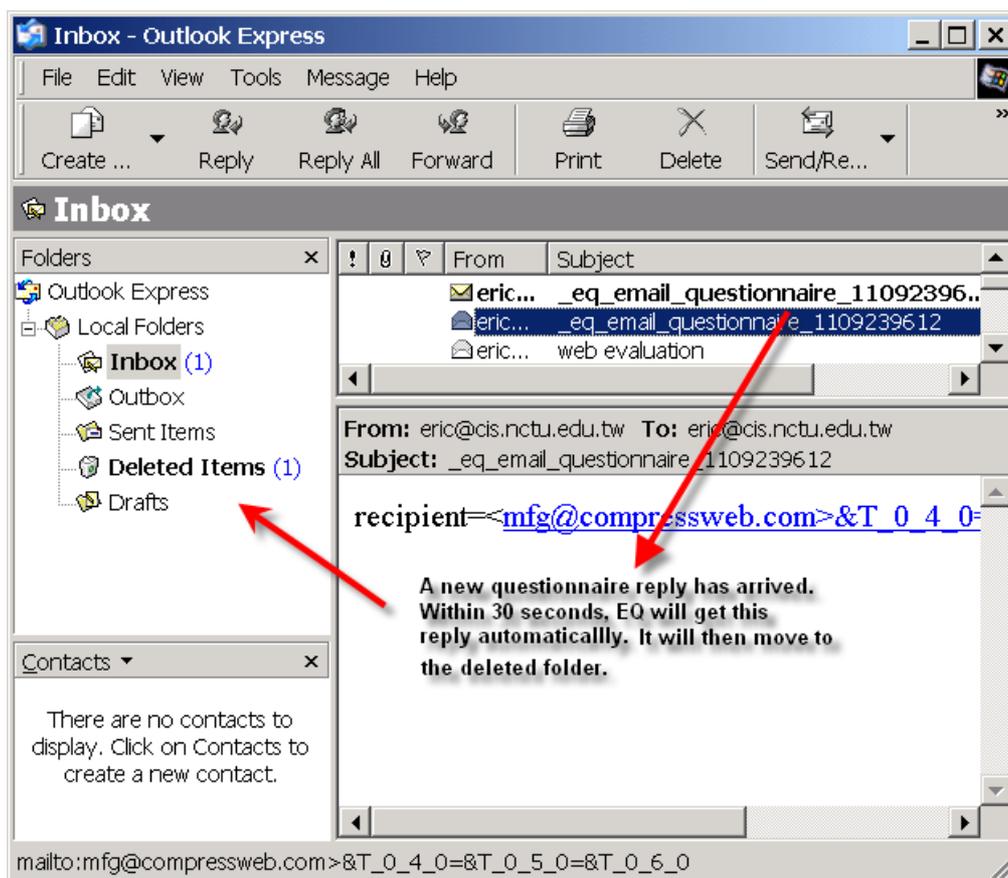Make sure the "Email Questionnaire Outlook Add-in" is selected.
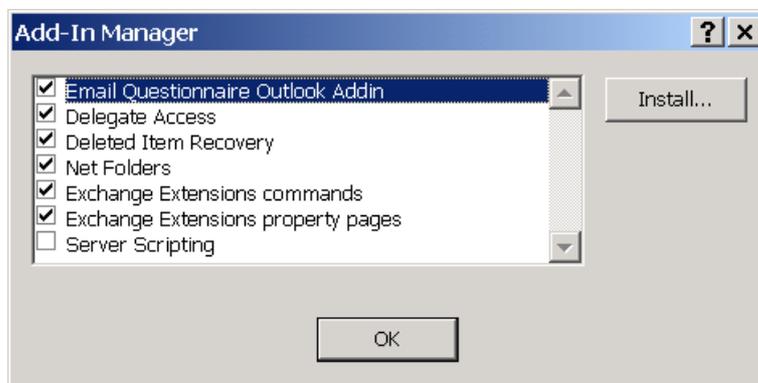
Enable Outlook Express Mail Monitor

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

The following diagram shows how EQ works with Outlook Express to get the replies.

Retrieve replies via Outlook Express polling.

Outlook Express must be set as the default mail client for Mail Monitor to work. If you see a warning message that Outlook Express is not your default mailer, then you will need to re-configure your Internet Explorer for this.

A warning message that Outlook Express is not your default mailer.

Enable Eudora Add-in

If selected, Eudora mail client will automatically redirect questionnaire replies to EQ. The replies need to be deleted from Eudora; Email Questionnaire cannot do this for you. Please create a new email filter for questionnaire replies and move them to the trash folder.

Note: For this option to work the EQ add-in for Eudora must be installed. You can check Eudora's plug-in settings to see if the Email Questionnaire plug-in is installed correctly.
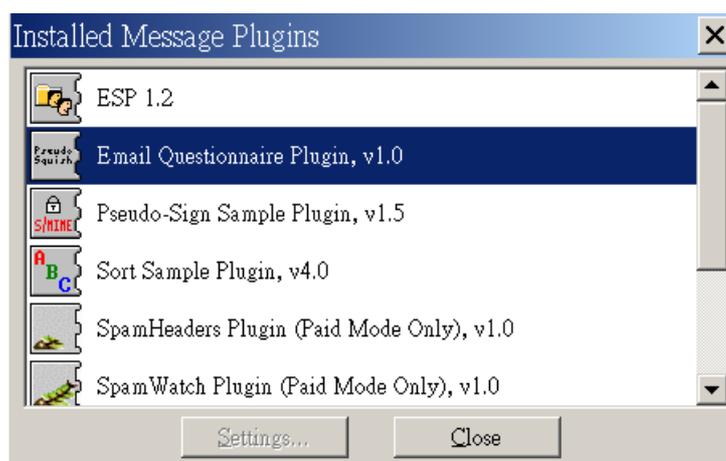
Sounds

If set, Email Questionnaire will play a sound when replies are received. Use the edit field to point to a wav file to play. If empty then the default sound will be used. Can only play *.wav sound files.

Send Setting

Edit before send

If you need to modify the HTML content before EQ sends the questionnaire, you can select **Edit before send.** It will then appear in the edit of your choice for editing. Closing the editor after saving the modifications will continue the send operation.

Send Format

**Always embed in email body (MIME)**

Sends the questionnaires in MIME encoded messages. MIME stands for **M**ultipurpose **I**nternet **M**ail **E**xtension, which is a standard to deliver email messages over the Internet. You should use this whenever possible, since it is more straightforward for the questionnaire participants. The questionnaire will appear directly in the body of the email message. See the picture below:
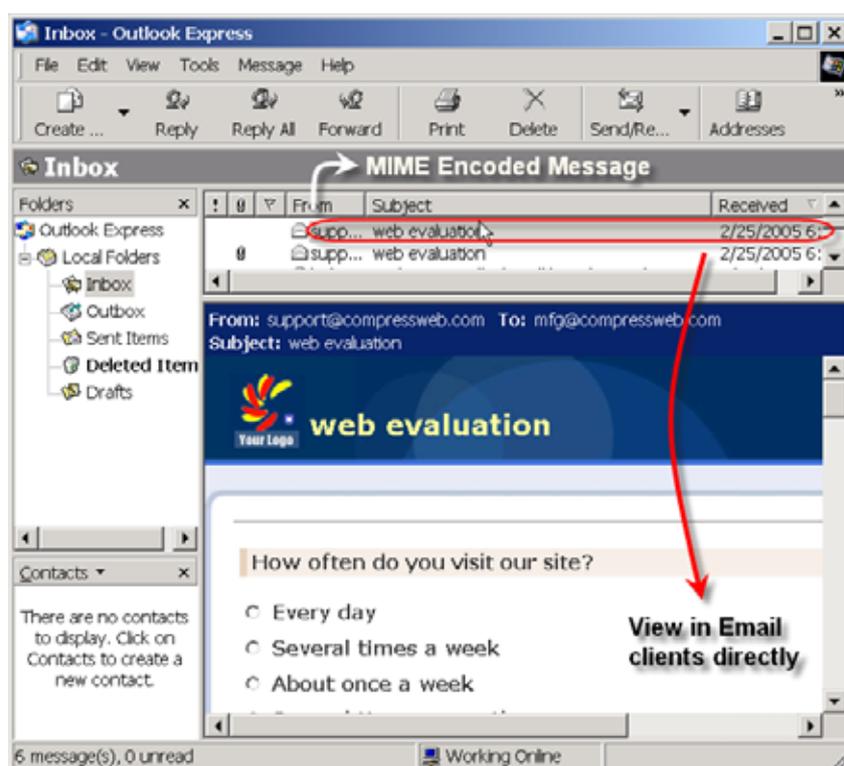
Attach for all

Sends the questionnaire as an attachment in HTML archive (*.mht). This is the aggregation of HTML content along with graphic files. Questionnaire participants have to download the attachment, and open it with their browser. Then they can view the questionnaire and submit the result.

Use this option only if you know that your questionnaire participants don't have MIME- enabled clients.
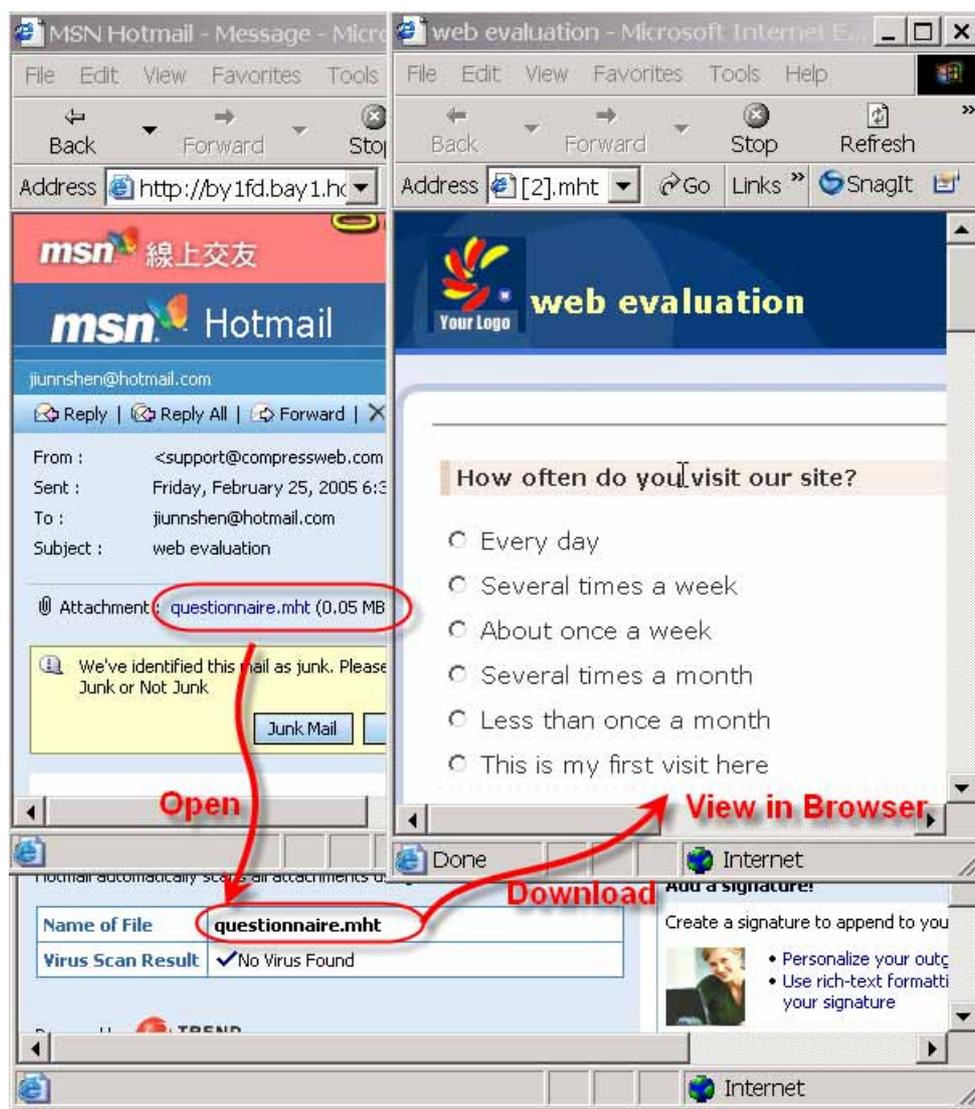
Attach Only HTML

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

Reply Method

There are two kinds of reply methods: **HTML mailto method** and **CompressWeb Form-email services**.

These are different syntax that EQ will use in the questionnaire.

Yahoo! Mail, Hotmail and Eudora don't allow html forms with the mailto method. If your questionnaire's recipients want to use these email clients, please use the CompressWeb Form-email services.

  Note: The CompressWeb Form-email services are available for register users only. For unregistered users, it is limited to 100 replies.

Address Book

EQ can use the address book from Outlook Express. If you want to use address books other than the default one, please specify it in the field provided.
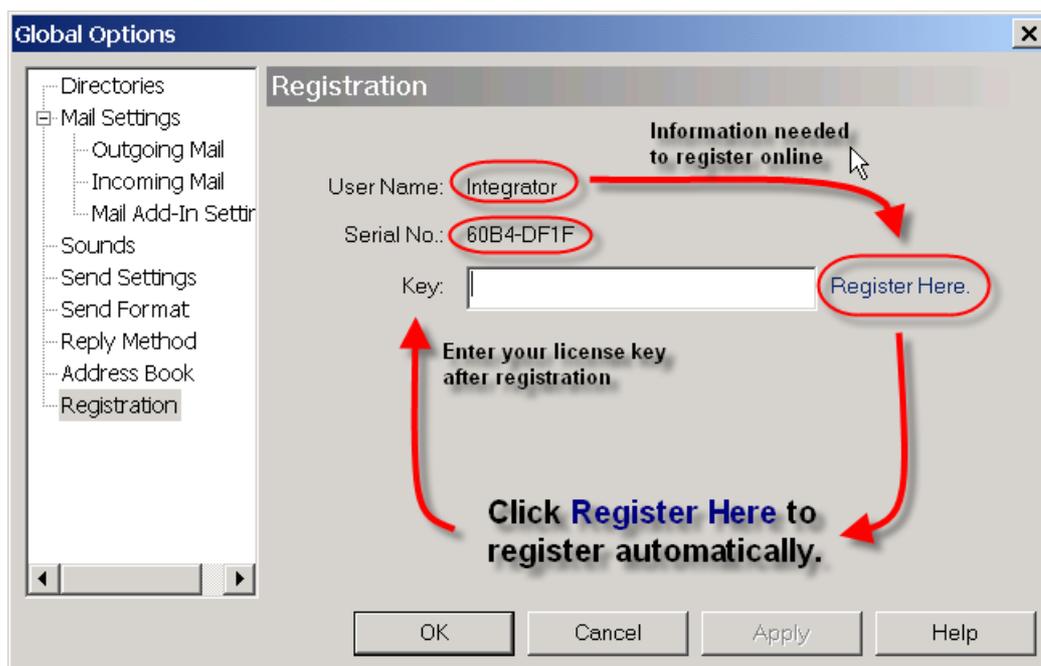
Registration

We provide a free trial version of Email Questionnaire. You do NOT need to order Email Questionnaire to evaluate it. The trial version has the following limitations:

1. A 30-day evaluation period.
2. Limited to 10 questionnaire participants per survey.
3. Compressweb Formmail gateway is limited to 100 for questionnaire replies.
4. Only one HTML template is available.

To enable all features, please register your EQ version at our website. You can do this automatically from the registration tab.
Since EQ is licensed to use in one PC only, you will need to purchase from the computer that you will actually run EQ.

From menu :(**T**)ools=>(**O**)ption then select Registration. Please refer to the following image:

If you would like to register manually, please follow the instructions below:
First, you need to provide your user name and disk serial number as it appears on the registration tab. If you intend to run EQ on another computer, you will need to install EQ on that machine first, and get the values of "User Name" and "Serial No" first.

Once registered, we will send you a registration code, which should be entered in the Key text field on the Registration page. All features will be enabled for the Standard/Professional/Enterprise versions after entering a valid registration key.

If the key that you entered is invalid, a warning dialog pops up and notify you about this. Otherwise, if no message is displayed, it means your license key is accepted.

If the license key is not valid, a dialog pops up to notify you.