



Web Questionnaire 4.0  
**Setup Guide**

2006/05/24

# Introduction

Based on our successful product, Email Questionnaire: An interactive email survey system, Web Questionnaire advances further to let users to publish the questionnaire to their websites. Using WQ's WYSIWYG questionnaire editor, a questionnaire could be composed within minutes and then publish to the websites immediately. Replies retrieval is integrate seamlessly with Outlook, or you could connect to your POP3 server directly.

Before using Web Questionnaire, some one-time options need to be setup. This document contains detail information regarding the configuration of Web Questionnaire.

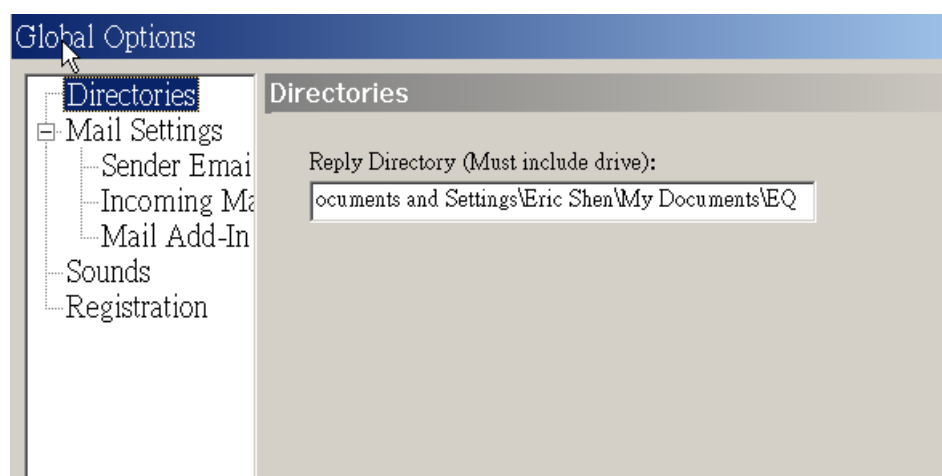
## Directories

### 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. Web Questionnaire uses this directory when locating the reply database for questionnaires. Each questionnaire has one associated rdb (result database) file.

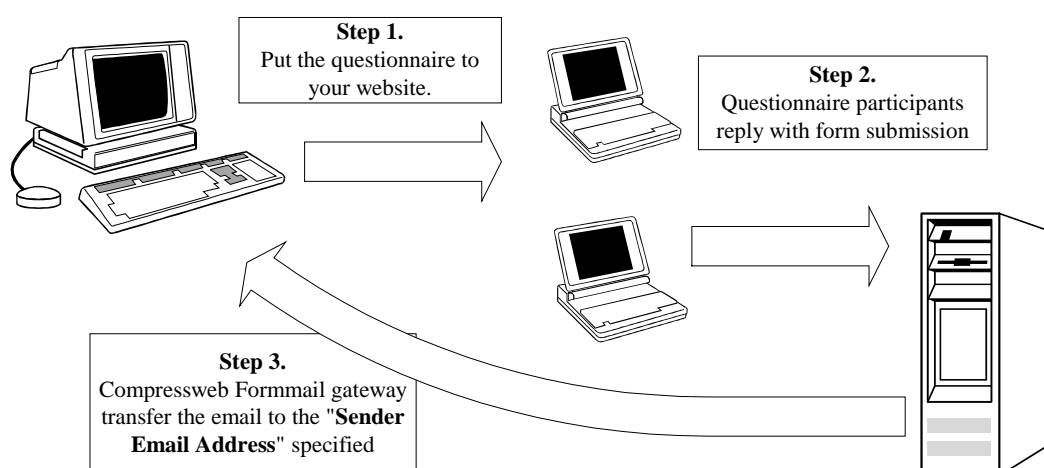
If you are upgrading to newer version of WQ, you probably will need to backup this directory in case the newer version does not work. You could either use WinZip to achieve them to a file, or use Windows Explorer to copy this directory to other places.

#### Set the Reply Directory



# Mail Settings

Before beginning configuration, it may be helpful to know how WQ works. Please see the diagram below:



Basically, there are three steps to conduct a Web Questionnaire survey.

- The questionnaire is first published to your Web Server.
- The questionnaire participants browse the questionnaires and submit the result to the Compressweb formmail gateway.
- The Compressweb formmail gateway forwards the reply to your email account, specified as the “Sender Email Address”.
  - The email forwarding automatically takes place when the questionnaire recipient presses the submit button on the questionnaire form.
  - It is possible to retrieve the email replies using Outlook/Outlook Express/Eudora/POP3. WQ will automatically locate replies and add them to the WQ report database.

### **Sender Email Address:**

Before starting a questionnaire, you must first tell WQ your email address.

When a recipient replies your questionnaire, the reply will be sent to this address. For example, [support@compressweb.com](mailto: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.

### **Encoding:**

Change the encoding of the outgoing emails. When this setting is selected, EQ, in accordance with MIME convention, inserts character set and encoding declaration into you message headers. It allows your recipient Mail clients to properly display your messages, according to language settings that you use.

### **Server Type:**

WQ 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 WQ. However, you will need to make sure that your Exchange Profile in Outlook is working.

If you are using Microsoft Exchange Server 5.5, WQ only supports the service pack 4 (sp4).

If you are using Outlook 2000, WQ will only work in the Corporation Mode, not the Internet Mail Mode.

If you are using Outlook 2002/XP/2003, WQ 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.

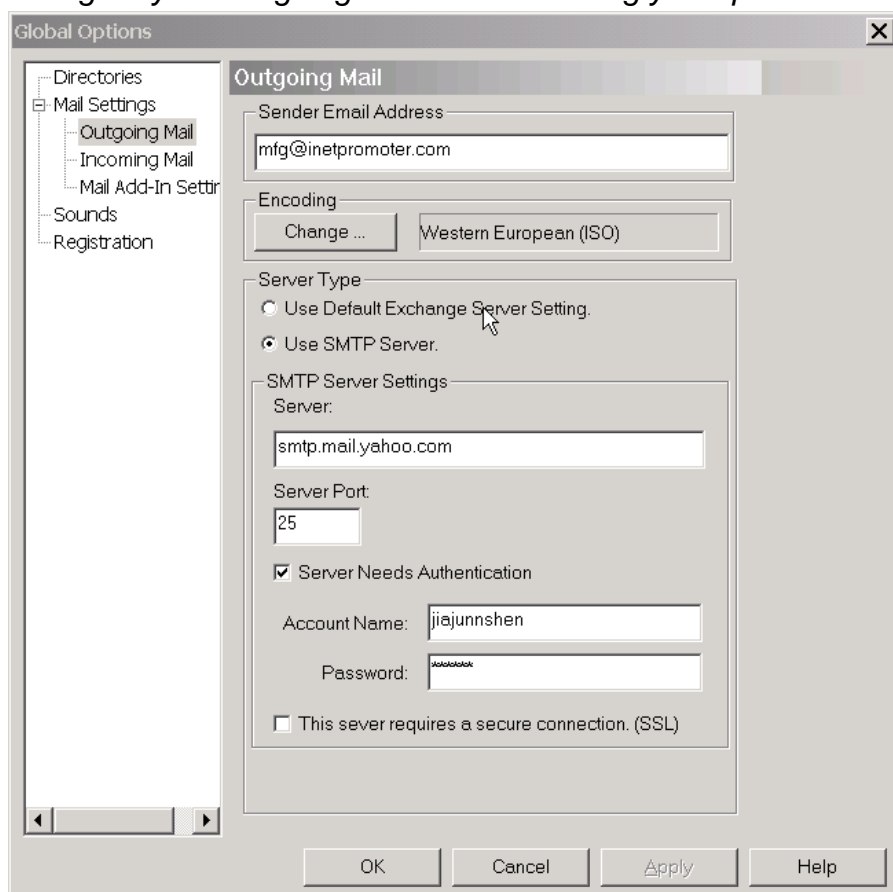
### Server Needs Authentication

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.

### This server requires a secure connection. (SSL)

Some SMTP servers require a secure connection. For example, if you are using gmail to send out questionnaires, you will need to check the SSL option, and enter 465 as the SMTP server port.

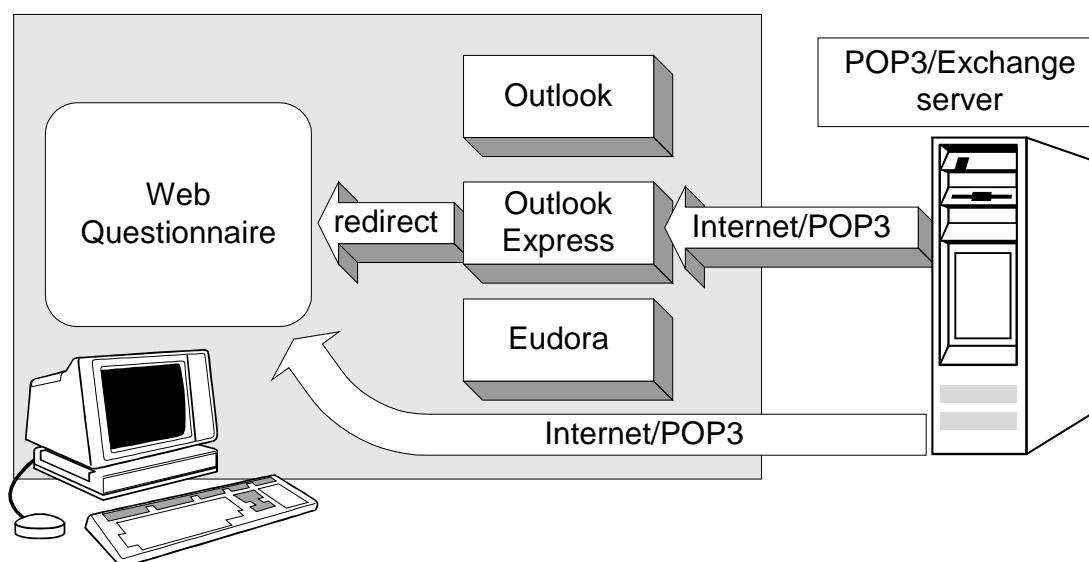
*Configure your Outgoing Mail before sending your questionnaires*



## Incoming Mail Settings

WQ 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 methods for WQ 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 WQ uses to get incoming emails:



### Enable POP3 Access

If selected, Web 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 Web 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 WQ 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.

### 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.

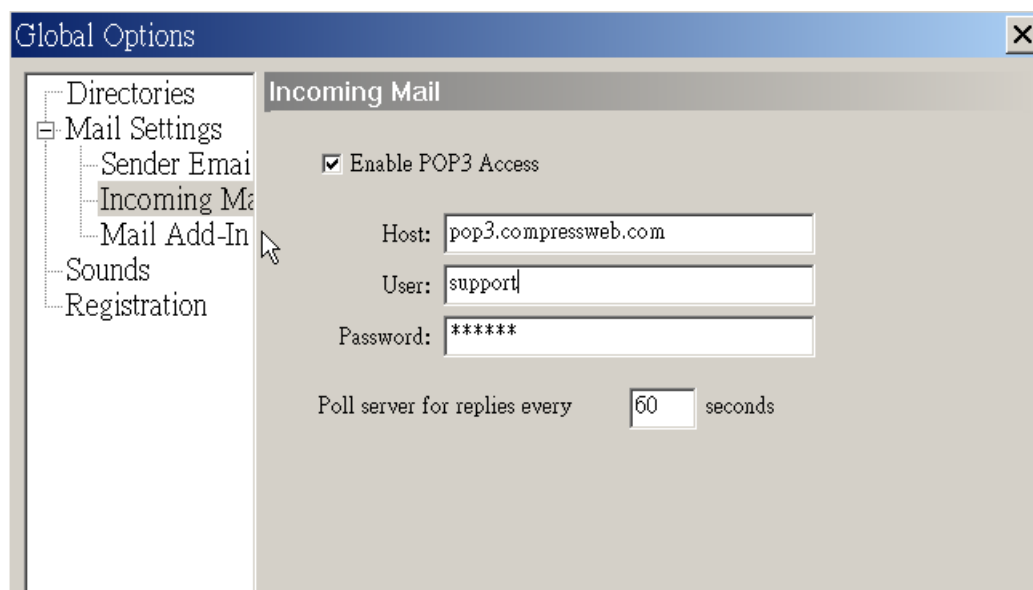
### Password

Password for the user pop3 account.

### Poll server

How long it takes to poll the POP3 server for questionnaire replies again.

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



## Mail Add-In Settings

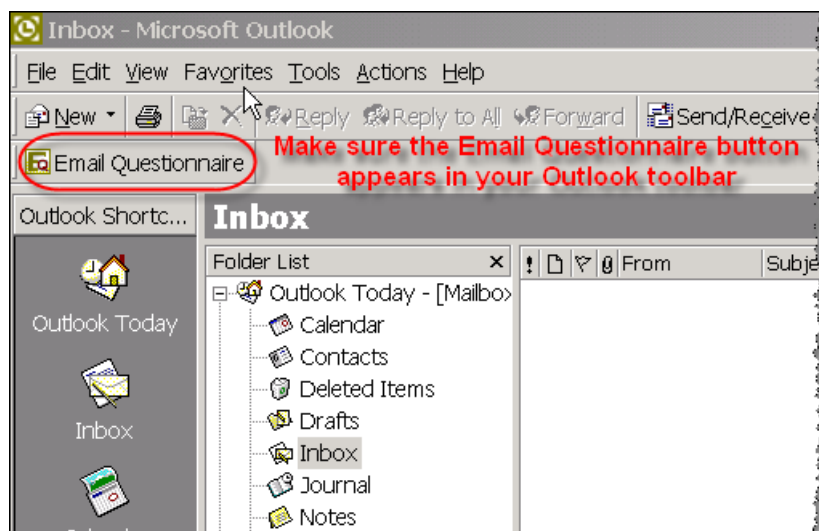
WQ needs to get questionnaire replies either from your mail client via one of the Mail Add-in methods, or directly from a POP3 mail server. You must configure one of them for WQ to work correctly.

### Enable Outlook Add-in

If selected, the Outlook mail client will automatically redirect questionnaire replies to Web Questionnaire. The replies will then be moved to the “deleted folder” in Outlook. This takes place when the questionnaire replies are downloaded from your mail server 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 WQ is run for the first time. If installed correctly a new tool bar with an Email Questionnaire button will appear when Outlook is started.

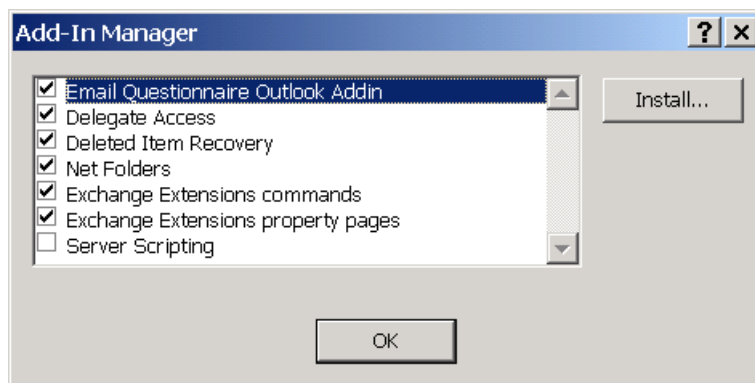
*Make sure that the Email Questionnaire button appears in your Outlook toolbar*



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 Addin” is selected.

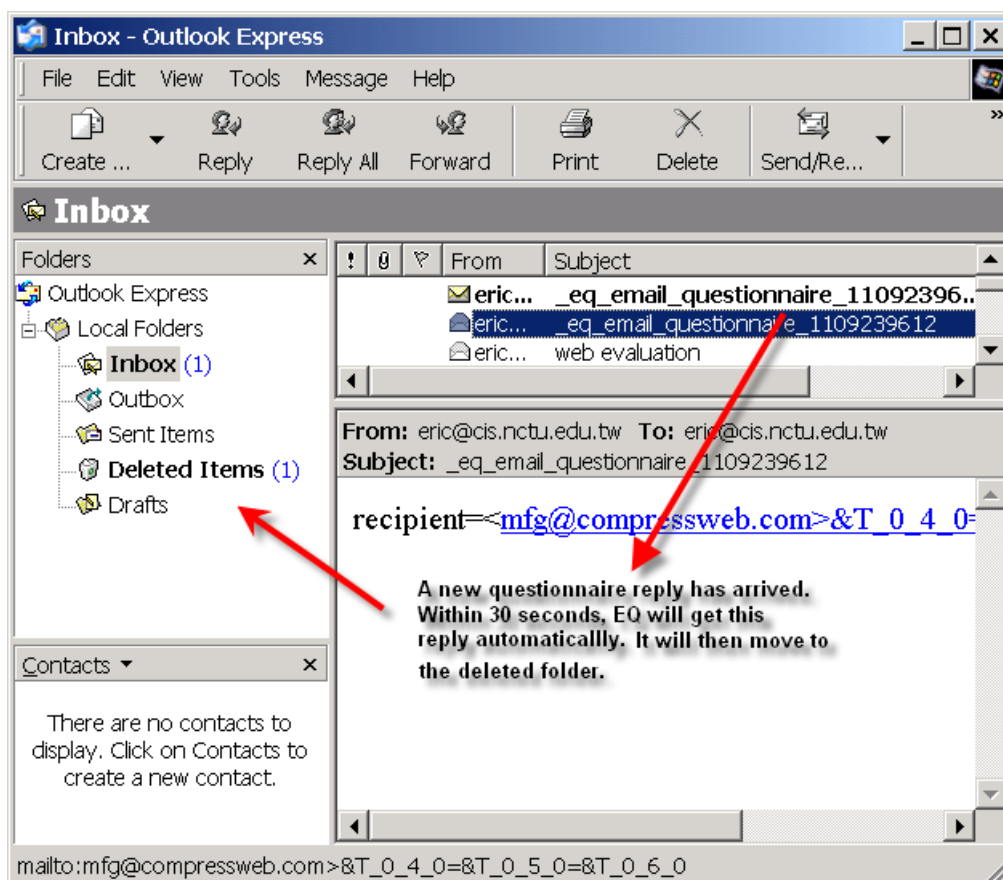


Make sure the “Email Questionnaire Outlook Addin” is selected.



### Enable Outlook Express Mail Monitor

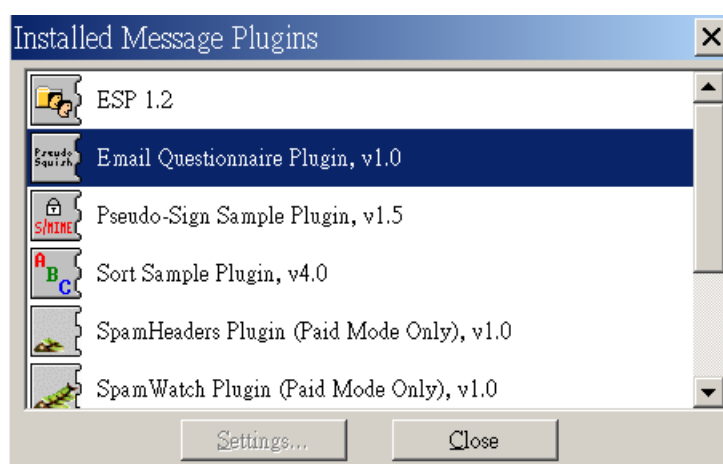
If selected, WQ will periodically poll Outlook Express mailbox for questionnaire replies. Outlook Express must be set as the default mail client for Mail Monitor to work. You could also click on the “Collect Replies” button in WQ toolbar to collect replies in the Outlook Express.



## Enable Eudora Add-in

If selected, Eudora mail client will automatically redirect questionnaire replies to WQ. The replies need to be deleted from Eudora, Web 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 WQ add-in for Eudora must be installed. You can check Eudora's plug-in settings to see if the Web Questionnaire plug-in is installed correctly.



## Sounds

If set, Web 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.

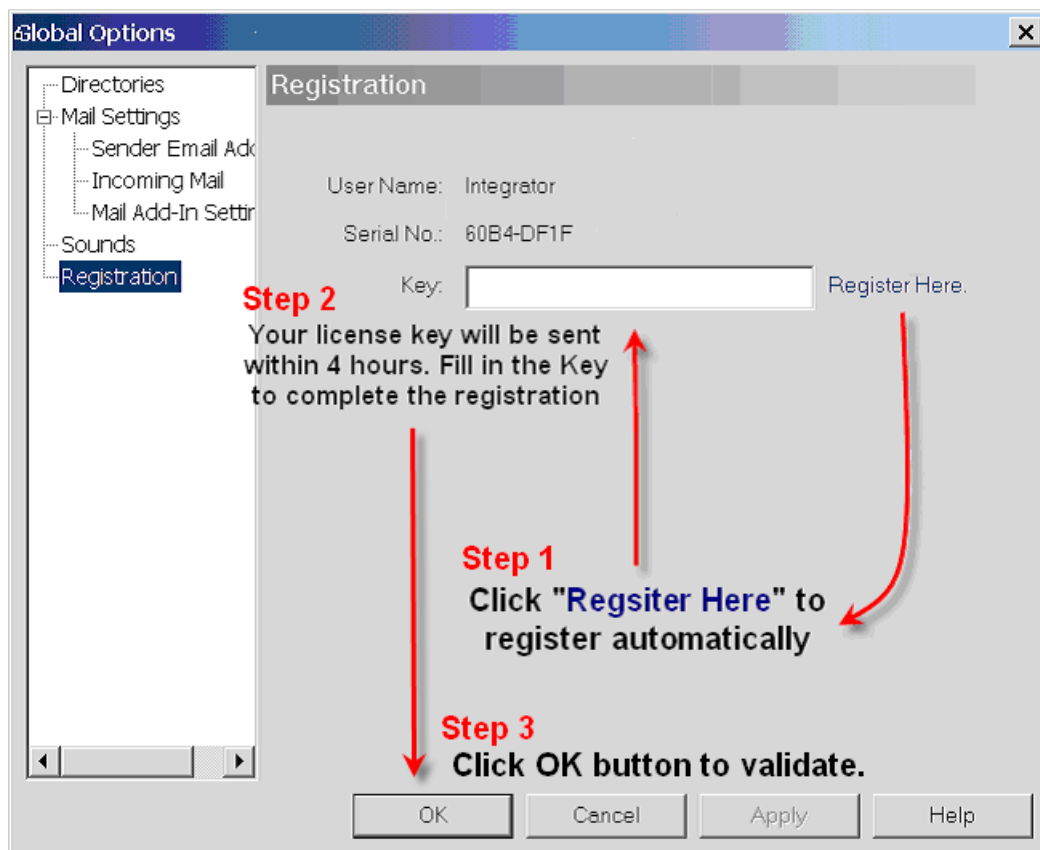
## Registration

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

1. A 30-day evaluation period.
2. Limited to 100 for questionnaire replies.
3. Only one HTML template is available.
4. Display "Unregistered" message at the bottom of the questionnaire.

To enable all features, please register your WQ version at our website. You can do this automatically from the registration tab. From menu :**(T)**ools=>**(O)**ption then select Registration. Please refer to the following image:

### *Register WQ automatically using Paypal*



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. Once registered, we will send you a registration code, which should be entered in the Key text field on the Registration page, and click the "OK" button to validate the license key. All features will be enabled 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.

