

Quick Start Guide
Creating a Questionnaire



Quick-start Guide: Creating a Questionnaire

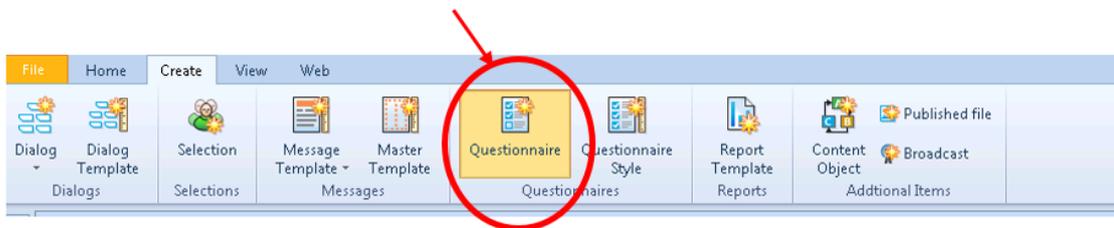
Introduction

This Quick-start Guide will take you through, step-by-step, the actions required to create a Questionnaire using Portrait Dialogue. The Guide is intended for beginners with little to no experience with using the Questionnaire function.

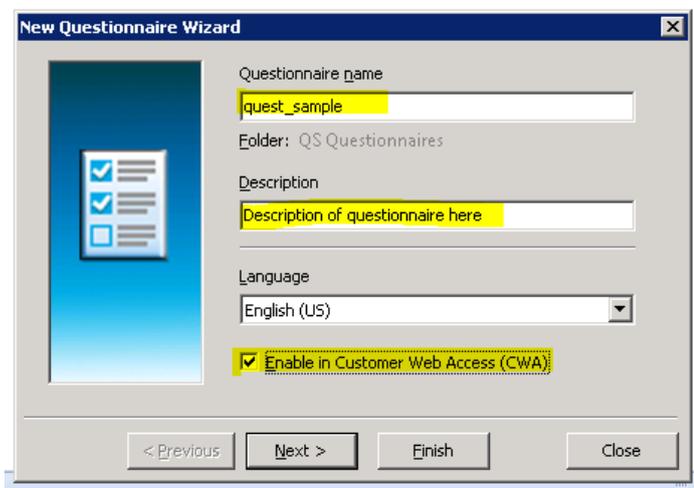
Please note - This is a guide for creating a basic questionnaire. The program has functionality to allow for very creative design and flow of the questionnaires; such as adding images, changing question position on pages, skipping questions and hiding sections. As you create more and more questionnaires you will discover these functions, alternatively you can contact Sarah at Spark – sjfowler@spark.com.au

Stage 1: Creating the new Questionnaire file

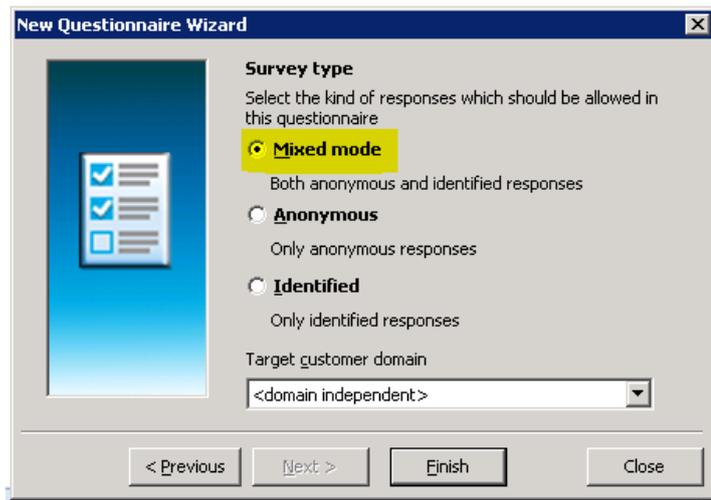
1. Go to the 'Create' tab and click on 'Questionnaire' to create a new Questionnaire file – pictured below.



2. A Windows Wizard will pop-up. Give your new Questionnaire a name and description. If you intend on making this survey accessible to external users (i.e. your members) then make sure the 'Enable CWA' box is checked. Click 'Next'.

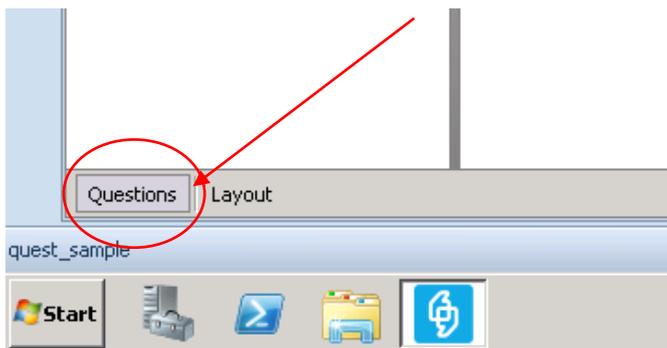


3. On this next screen, leave the selected option of 'Mixed mode' (pictured below) and click 'Finish'. This is the most common and least restrictive type of survey. You are now in the Questionnaire Designer area of the program.

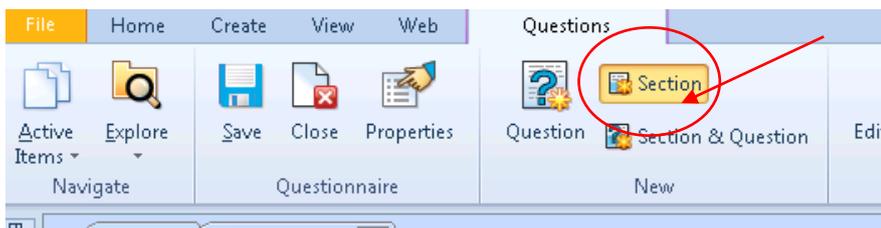


Stage 2: Designing Sections and Questions

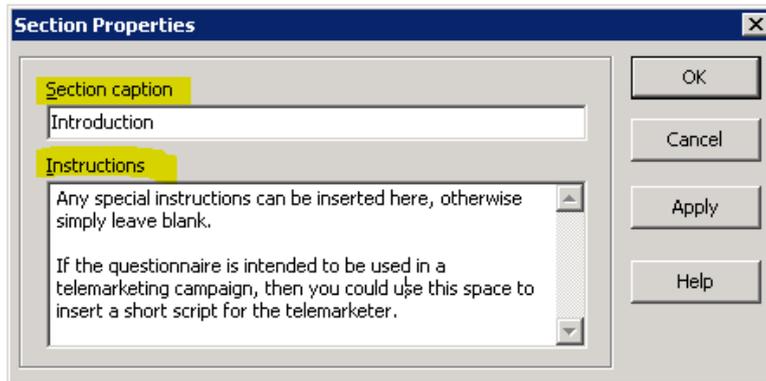
1. There are two views available for use when designing your Questionnaire; the 'Questions' view – where you can create the Sections and Questions and the 'Layout' view – where you can manage the look and flow of your Questionnaire. To start with, make sure you are on the 'Questions' tab – pictured below.



2. Create your first Section by clicking the 'Section' button from the top navigation bar – pictured below. (A section is a grouping of questions. It consists of one or more questions.)



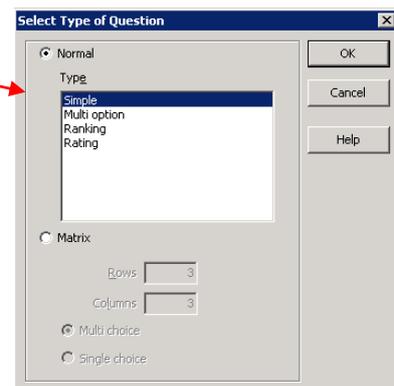
3. A window then pops up asking for a section caption and instructions – pictured below. Enter your required details then click 'OK'.



4. Add a new question to your newly created section by clicking the 'Question' button in the top navigation bar – pictured below.



5. You are now presented with a box with several options you have for creating a question – pictured right.



The following three pages show detailed examples and guidelines of how to do three different types of questions. Once you have become familiar with the process on these, the other question types are user-friendly and follow a very similar process.

QUESTIONS TYPE: NORMAL (SIMPLE)

Enter your question details in the Properties window that pops up – pictured below – then click 'OK'

The image shows a screenshot of the 'Properties of Simple Question' dialog box. The dialog has a title bar with a close button. On the right side, there are buttons for 'OK', 'Cancel', 'Apply', 'Help', and 'Simple <<'. The main area contains several sections:

- Section caption:** A text box containing 'Introduction'. A callout box points to it with the text 'Leave as is'.
- Question caption:** A text box containing 'What words come to mind when you think about banking?'. A callout box points to it with the text 'Enter your question here'.
- Key:** A text box containing 'Q1' and a checked checkbox labeled 'Answer required'. A callout box points to the checkbox with the text 'If this question is mandatory, ensure this box is checked'.
- Data type:** A dropdown menu with 'String' selected. A callout box points to it with the text 'Select the type of answer format you prefer'. The dropdown menu is open, showing options: String, Integer, Float, Date, and Date and time.
- Use domain field as a default value:** An unchecked checkbox.
- Automatically update domain field with answer:** An unchecked checkbox.
- Default value:** An empty text box with a browse button (...).
- Max. length, Min. value, Max. value:** Three text boxes, each with a browse button (...).
- Control type:** A dropdown menu with 'Textbox' selected.
- No. of lines:** A spinner box set to '3'. A callout box points to it with the text 'Here you can make the answer box larger and easier to view if the answer is expected to be long'.

On the right side of the dialog, there are buttons for 'OK', 'Cancel', 'Apply', 'Help', and 'Simple <<'. A callout box points to the 'Simple <<' button with the text 'Click on 'Advanced' to view all question properties. Reverts to 'Simple''.

QUESTION TYPE: NORMAL (MULTI OPTION)

Enter your question details in the Properties window that pops up – pictured below – then click 'OK'

The screenshot shows the 'Properties of Multi Option Question' dialog box. It contains several fields and controls:

- Section caption:** A text box containing 'Introduction'. A callout box says 'Leave as is'.
- Question caption:** A text box containing 'Which of the following do you own?'. A callout box says 'Enter your question here'.
- Key:** A text box containing 'Q2'. A callout box says 'If this question is mandatory, ensure this box is checked'. To the right of the key box is a checkbox labeled 'Answer required' which is checked.
- Choice type:** Two radio buttons: 'Multi choice (multiple options can be selected)' (selected) and 'Single choice (only one option can be selected)'. A callout box says 'Select either multi or single choice option'.
- Options table:** A table with columns: Caption, Datatype, Single, Selected, Key. It lists 'Phone', 'Car', 'House', 'Computer', and '<new option>' with 'Boolean' datatypes and keys 'A1' through 'A5'. A callout box says 'If multi choice is selected, then enter possible answers here. Add each option by clicking the '+' button'.
- Required number of options to answer:** Two input boxes for 'Minimum' and 'Maximum'. A callout box says 'Enter min and max numbers if needed'.
- Control type:** A dropdown menu with 'Check boxes' selected. A callout box says 'Select the type of answer format you prefer'. Below the dropdown is a 'Listbox' option.
- Buttons:** 'OK', 'Cancel', 'Apply', and 'Help' are on the right side.

QUESTION TYPE: MATRIX (MULTI OPTION)

Enter your question details in the Properties window that pops up – pictured below – then click 'OK'

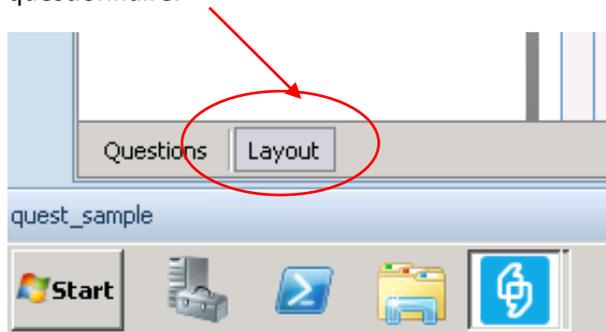
The screenshot shows the 'Properties of Matrix Question' dialog box. It contains several fields and controls:

- Section caption:** A text box containing 'Introduction'. A red callout box labeled 'Leave as is' points to this field.
- Matrix caption:** A text box containing 'How often do you perform the activites listed below?'. A red callout box labeled 'Enter your question here' points to this field.
- Key:** A text box containing 'M1'. A red callout box labeled 'Enter your answer options here' points to this field.
- Layout options:** Two radio buttons: 'Use horizontal layout' (selected) and 'Use vertical layout'.
- Column and Row headers:** Two text boxes. The 'Column' box contains 'Never' and the 'Row' box contains 'Check your email'. Both have '+' and '-' buttons next to them. A red callout box labeled 'Add additional columns and rows if needed' points to these controls.
- Matrix grid:** A table with 3 columns and 3 rows. The columns are labeled '1-5 times per week or more times', 'Never', and 'Never'. The rows are 'Check your email', 'Read the newsp', and 'Log into a social'. Each cell contains a radio button. A red callout box labeled 'Select the type of answer format you prefer' points to the 'Cell type' dropdown.
- Cell type:** A dropdown menu set to 'Radiobutton'. A red callout box labeled 'Select the type of answer format you prefer' points to this dropdown.
- Buttons:** 'OK', 'Cancel', 'Apply', and 'Help' buttons are located on the right side of the dialog.

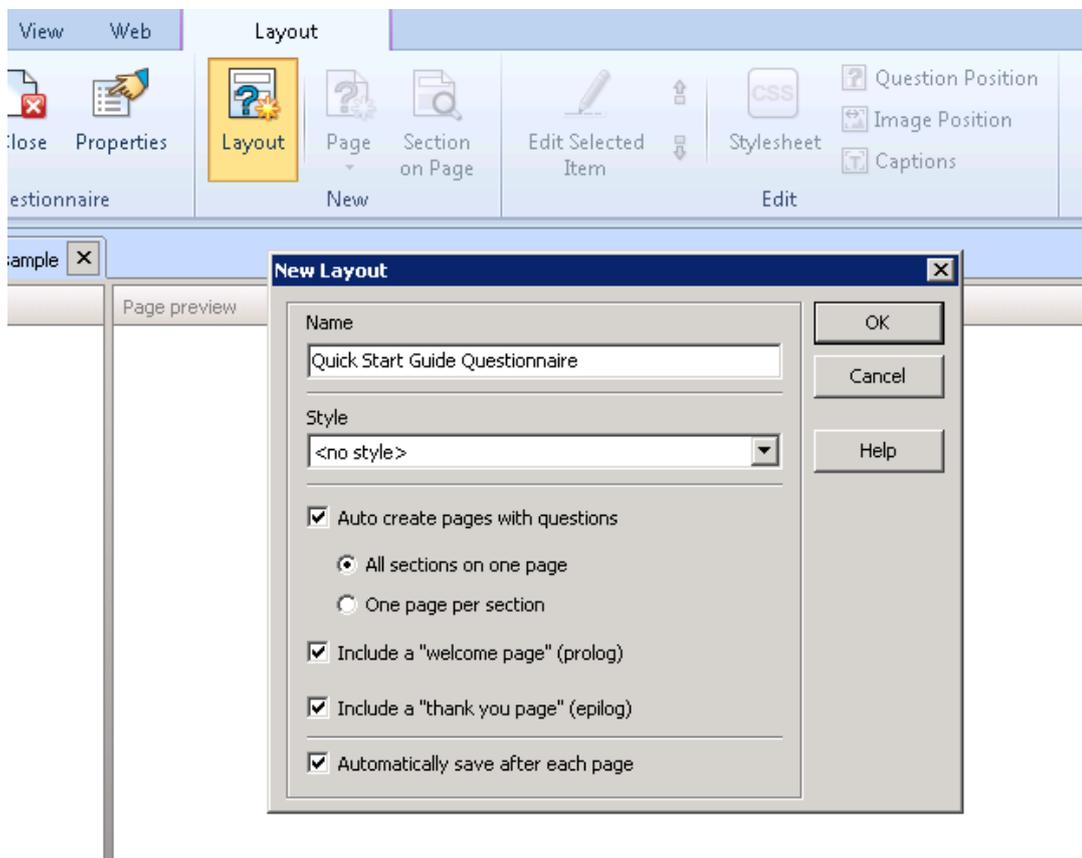
	1-5 times per week or more times	Never	Never
Check your email	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Read the newsp	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Log into a social	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Stage 3: Designing the Layout

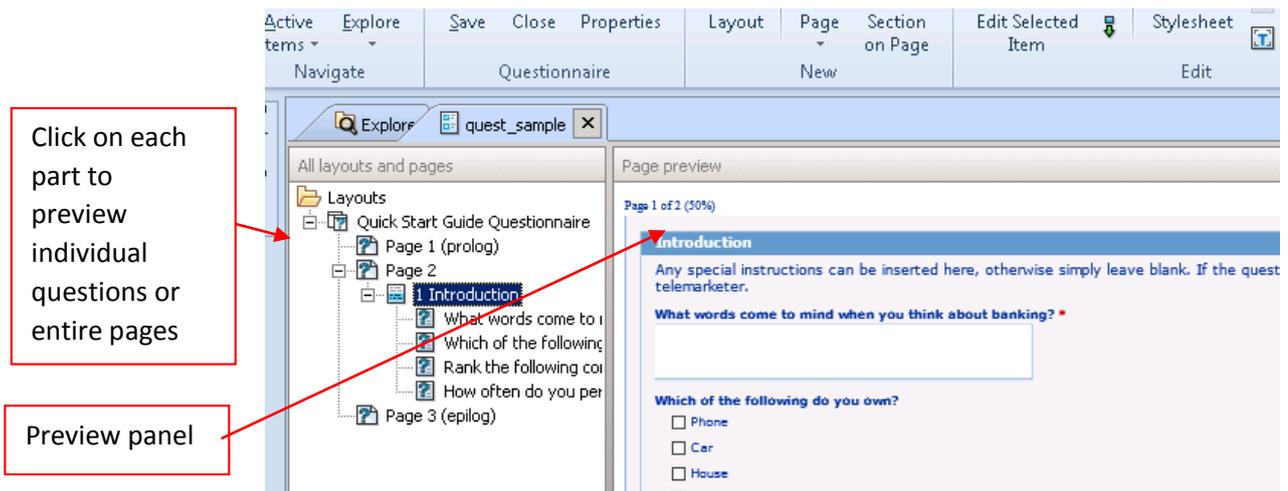
1. Click on the Layout tab. Here is where you can edit the visual presentation and flow of your questionnaire.



2. Click on the 'Layout' button (pictured below) in the top navigation bar. Fill in the details on the new window that pops to create a new layout. Ensure the 'Automatically save after...' box is checked.

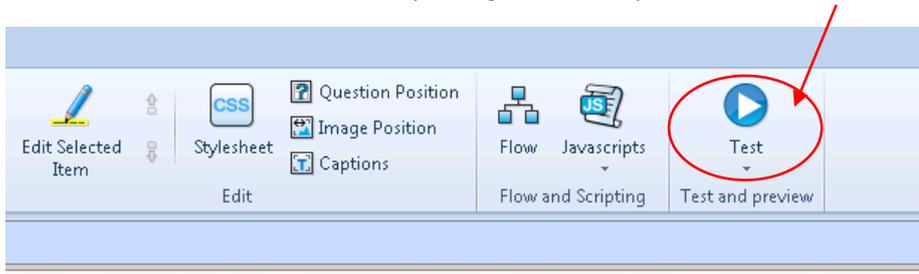


3. You will now be presented with a split screen where you can preview and test your questionnaire.



Stage 4: Testing the Questionnaire

1. Click on the 'Test' button in the top navigation bar – pictured below.



2. A testing window will now pop up. Under testing, the questionnaire will behave exactly as it will when it is completed by a real respondent, including logic such as validation and flow. The only difference is that the answer form will not be stored in the Dialogue Server database.

Maximise the window and run through the questionnaire as an end-user would do. Any changes that you need to make from here can be performed back in the 'Questions' tab.

Now, don't forget to SAVE your work!

CONGRATULATIONS! You have now created your first Questionnaire.

Please remember this is a guide for a basic questionnaire. Portrait Dialogue has functionality to allow for very creative design and flow of the questionnaires; such as adding images, changing question position on page, skipping questions and hiding sections. As you do more you will discover these functions. Otherwise, just contact Spark and we can help you with tricky questions.