Questionnaires

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Step-by-step questionaire for anonoumous users

1. Create a new solution and test it
2. Create an interface
   - [solution] > Advanced > Interfaces ... ADD
     - Interface
       - Active: X
       - Unique name: [unique name across all interfaces]
     - Anonoumous user
       - Active: X
       - **Insert items: X**
       - Use questionaire style interface: X
3. Set the order of fields
   - [solution] > Wizards > Questionaire order
     - Enter values
       - 0 = disabled in questionaire
       - Numbers dont need to be consecutive
     - Accept with Submit
4. Ensure that anonoumous users can access to the solution
   - UserID = 10003 must have a group that has permissions
5. Test link using
   - http://[server name]/[application]/webinterface?[interfacename]=1

Step-by-step questionnaire for specific users

1. Create a new solution and test it
    - Make sure that solution contains an field of the Email type
2. Create an interface
    - [solution] > Advanced > Interfaces ... ADD
        - Interface
            - Active: X
            - Unique name: [unique name across all interfaces]
        - Anonoumous user
            - Active: X
            - **Update items: X**
            - Use questionaire style interface: X
3. Create an status action that sends emails with tokens
    - Required: Set the correct interface
    - Option: Set a status that is used if email sending fails
4. Set the order of fields
    - [solution] > Wizards > Questionaire order
        - Enter values
            - 0 = disabled in questionaire
            - Numbers dont need to be consecutive
5. Ensure that anonoumous users can access to the solution
    - UserID = 10003 must have a group that has permissions
6. Test solution
    - Goto frontend
    - Create new record and set status to that of the action trigger
    - Test token
        - Collect from you own email OR
        - Check the email queue in the designer

Controlling the status flow

Status after **first update**:

1. Designer > [Solution] > Advanced > [Interface]
2. Update the value "Status after update"

Status after questionaire **completion**:

1. Designer > [Solution] > Advanced > Functionality - Questionaire - Messages
2. Update the value "Final status"

Questionnaire building process

In order to create a complex questionaire you first choose between copying a solution and creating from scratch.

We strongly reccomend the copying if you are unfamiliar with designing solutions.

Creating from scratch

Steps to create a questionaire includes

1. Create solution and add fields
2. Configure questionaire order and messages
3. Setup inetrface for external users
4. Configure email invitation
5. Build report template

For detailed information read the section **Setting up a questionaire with report** below.

Copying a solution

Steps include

1. Backup existing solution
   - *Entity* > Advanced > Backup > Create new backup
2. Promote backup to standard
   - Click top backup > Promote to standard
3. Create instance from standard
   - Quickstart > Repository > *choose* > Create this item
4. Deploy solution
   - *New entity* > Deploy live

Setting up a questionnaire with report

Field types

Complex questionnaires contain fields for sending the questionnaire and answering questions.

Depending on how the questionnaire is distributed to the users, you will also need contact information such as name and email.

Questions and scores

For normal questions that are answered once use the field type: **Complex question**

A complex question contains a single question and multiple answer. Each answer contains

- Value shown when selecting
- Response showed in report
- Color and icons
- Score

You can optionally calculate scores across multiple questions using the field: **Calc: Complex question (sum)**

Support for multiple questions

Multi line questions consists of the following

- Multiline: Location editor
- Multiline: Complex question

There should only be exactly one **Multiline: Location editor**, while there can be multiple **Multiline: Complex question**.

First the users enters lines values in the location editor. Then questions are created for each **Multiline: Complex question** - one for each line entered in the location editor.

Lines can be removed by clicking the checkbox next to them in the **Multiline: Location editor**.

Questionnaire

Normal users will see data represented as a form, while external users will most often have displayed a step-by-step questionnaire.

Inclusion of fields and their page order is managed in the questionnaire order editor: **Entity > Advanced > Questionnaire: Question order**

Note that

- If a field have a sortorder of 0 (zero), it will never be displayed for external users.
- Order numbers are not dispayed to the user and do not need to be consecutive - ex. 10, 20, 30 ...

The initial and final messages of the questionnaire is edited in: **Advanced > Questionnaire: Messages**

From a normal view normal users can see data in questionnaire form, by appending and extra command to the address bar in the browser: **&StepNumber=0**

Granting access for external users

The process consists of 2 activities

1. Add access for external users by adding a new permission
2. Add an interface for the solution: Advanced > Interface: Add
   - Enter a descriptive and unique name
   - Check "UPDATE"
   - Check "Use questionnaire style interface"

Sending emails with links

In order to send personalized message you solution will need to contain these fields

- Text: Enter the name of recipient
- Email: Email of the recipient

These fields are refered to in the message template in a status action, which is where subject and body of the email is edited.

A message is sent to the recipient, when a record in the system reaches a certain state.

Configuring reports

Report are Word documents containing special tags where content from the records are merged into the document.

1. Create a new Word document
2. Write content and add special field tags
   - Entity > Advanced > Template: Add > Office > (copy special tags)
3. Add template to the solution
   - Entity > Advanced > Template: Add
   - Choose Word or PDF add
   - Uplaod the Word file

Note that certain configuration options for fontsize, margin etc. can be configured per solution: Entity > Advanced > Configurations

- GlyphPageWidthPercentage
- HeatmapColumnMaxCharacters
- renderExtraLinjeBeforeNotes
- renderExtraLinjeBeforePicture
- renderQuestionInTable

Often you will want at heatmap of the answered questions in first pages of the report. For this you add a field of the type: **Word heatmap index**

In case you want a dedicated button at the top of the page please add a field of the type: **Action button: Export template**

Cheatsheet

Fields in solution

Normal questions

- "Complex question"

Sum of scores in normal questions

- "Calc: Complex question (sum)"

Setting up multiple response for a question

- "Multiline: Location editor"
- "Multiline: Complex question"

Contact information for sending emails

- Text and Email for contact information

Content for the Word report

- "Word heatmap index"

Questionnaire field order

Entity > Advanced > Questionnaire: Question order

Order 0 means field is NEVER displayed

Questionnaire start and end messages

Entity > Advanced > Questionnaire: Messages

Send invitation to customer

1. Entity status: Click status > Add status action

2. Set email recipient = Email field
3. Integrate name in message: Dear {NAME}

Template for report

1. Create Word document
2. Add content tags - ex. "${NAME}"
3. Add to solution: Entity > Advanced > [Template list] > Add