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**

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