

## Chapter 4: Quick Tour

This chapter is designed to get you familiar with the PocketSurvey features as quickly as possible. Don't worry if you do not understand all the features mentioned in this chapter — they are explained in later sections of the manual in more detail.

You will find PocketSurvey easy-to-use and you will quickly get used to designing complex questionnaire surveys after you have created a few. With PocketSurvey you can choose commands using the menu, toolbar or shortcut keys,

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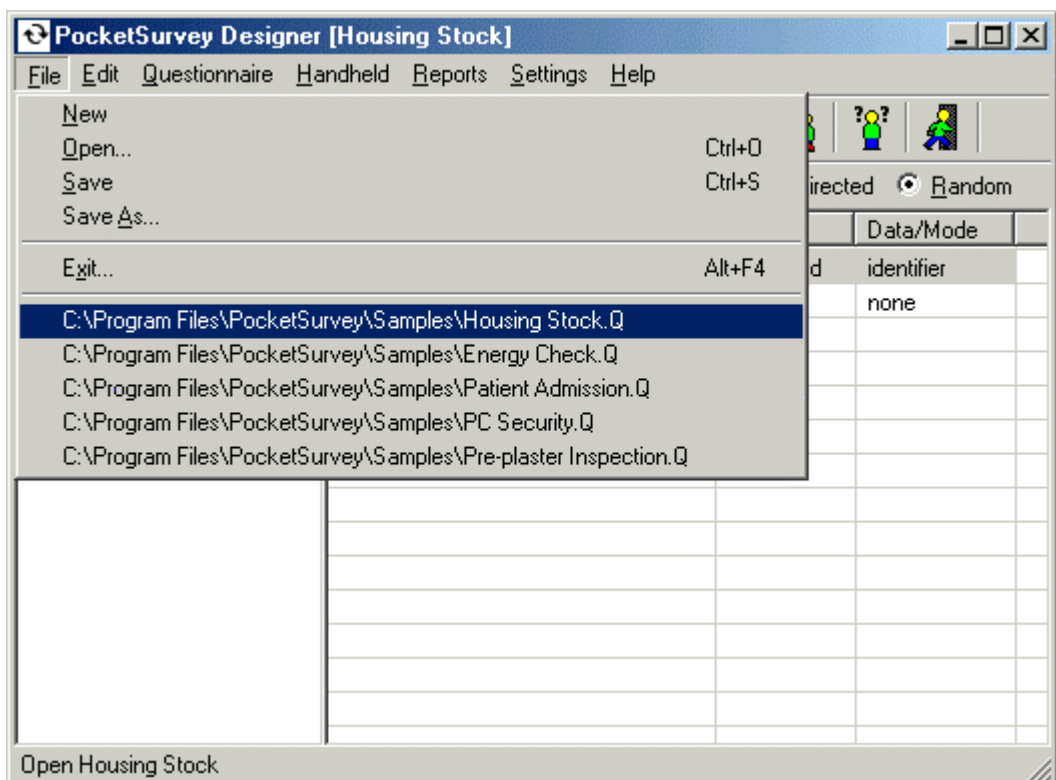
- [Menu Bar](#)
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## Menu Bar

Most PocketSurvey functions are accessible from the **MAIN** menu bar shown below.



As you click on each item on the menu bar you will see a pull-down menu appear, similar to that shown below, showing you the option available in each menu. There is a chapter in this manual describing each of the menus.



**Tip**

Notice that the shortcut keys are shown alongside each menu option.

## Main Toolbar

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The **MAIN** toolbar, shown below, accesses the most frequently used features of PocketSurvey.



If you are uncertain what an icon does, place your cursor over it. Its functional description will be shown on the status bar at the bottom of the main screen.



**NEW.** Start a new questionnaire.



**OPEN.** Opens a questionnaire.



**SAVE.** Save the current questionnaire.



**OPTIONS.** Set the questionnaire design options.



**ITEM EDITOR.** Insert or modify a question or a group.



**BACK.** Move back up to a parent group.



**SIMULATOR.** Use the handheld simulator rather than a real handheld.



**SEND.** Send the questionnaire design to your handheld.



**RECEIVE.** Receive the results of your survey.



**RESULTS.** Display the results of your survey in your web browser.



**HELP.** View the online user manual and get help.



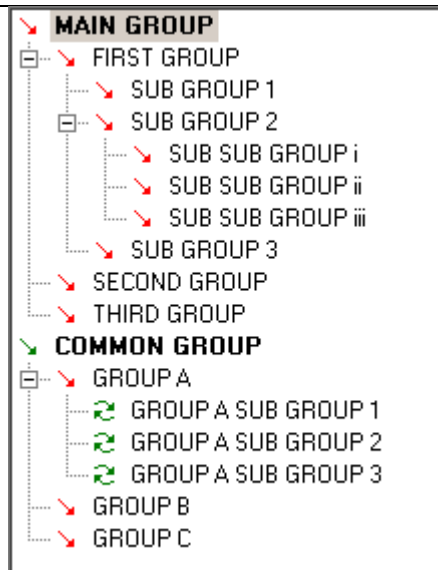
**EXIT.** Close PocketSurvey.

## Survey Structure Area - Groups

The survey structure shown below shows the groups in your questionnaire. A questionnaire always has a Main group. In this Main group can add questions or add more groups as required. Normally it is a good idea to organise your questions into groups especially for large complex questionnaires.

### Note

Unlike most other questionnaire design software, PocketSurvey lets you have groups within groups; and you can even add a group in the middle of a set of questions!



### About Groups & Icons Used

Groups can be **directed**, where questions within the group are shown to the user sequentially; or they can be **random** where the user can choose the order in which answer questions.

Furthermore, a group can be **mandatory**, where the user must enter or visit the group, or **optional**, where the user can leave the survey without answering the questions.

### Note

If the group that they are entering is random they may not necessarily have to answer any questions within the group - this will depend whether individual questions are mandatory or not.

- indicates an **optional** directed group.
- indicates a **optional** random group.
- indicates a **mandatory** random group.
- indicates an **mandatory** directed group


















### Tip

Notice that **red** indicates mandatory and **green** indicates








 optional.

## Question Display Area

The question display area, shown below, shows the questions (and groups) in the currently selected group of your questionnaire. The question/group name is displayed along with the question/group type and question data destination or group mode

Question/Group	Type	Data/Mode	
 1: Text Input - Who are you ?	Text	Survey Details	
 2: Menu Selection - Select a colour	Menu	Survey Details	
 3: Menu Selection - Select foods you like	Menu	Survey Details	
 4: Number Question - How old are you	Number	Survey Details	
 5: Yes/No Question - Do you like computers	 Menu	Survey Details	
 6: What computer do you have?	Text	Survey Details	
 7: Formatted Question - Enter A9	Formatted	Survey Details	
 8: Jump Question - Skip next question	Jump	Survey Details	
 9: This question is always skipped	Link	none	
 10: Auto Date - Not shown but collects current date	Auto date	none	
 11: Auto Time - Not shown but collects current time	Auto time	none	
 12: Input Date - User must enter a date	Input date	Survey Details	
 13: Input Time - User must enter a time	Input time	Survey Details	
 14: Barcode - Used with barcode reader	Barcode	none	
 15: Sketch - User can sketch something	Sketch	Survey Details	
			

### Icons used

-  indicates a **mandatory** question.
-  indicates an **optional** question.
-  indicates an **optional** directed group.
-  indicates an **optional** random group.
-  indicates a **mandatory** random group.
-  indicates a **mandatory** directed group.
-  indicates no more questions. You can insert questions above this line.

### Tip

Notice that red indicates mandatory and green indicates optional.

### Question Number

Question numbers are generated automatically by PocketSurvey as the design is created. They are used for reference purposes. Strictly speaking the number shown is a statement number, because you can intersperse groups between questions as shown below.

Question/Group	Type	Data/Mode	
1: Name	Text	House	
2: Address	Text	House	
3: A GROUP BETWEEN QUESTIONS	GROUP	Directed	
4: Postcode	Text	House	
5: Phone	Text	House	
6: Ownership	Menu	House	
◆			

**Tip**

Although you can insert groups in between lists of questions, you might find it clearer to structure your questionnaire with more groups.

Question/Group	Type	Data/Mode	
1: GROUP ONE	GROUP	Directed	
2: GROUP TWO	GROUP	Directed	
◆			

**Question Prompt**

Tells the handheld user the nature of the question when answering that question on site. It is an indication as to what information is required in the answer to the question.

Question Text may also be used to direct answers to identically named database fields when the results of a questionnaire are received into the PC. See elsewhere in this guide for an explanation of this feature.

**Question Type**

Questions can be any of the following types:

- ⇒ Number
- ⇒ Text
- ⇒ Formatted
- ⇒ Menu, including multiple choice & single choice and nested menus
- ⇒ Jump
- ⇒ Link
- ⇒ Barcode
- ⇒ Sketch
- ⇒ Camera
- ⇒ Input Date
- ⇒ Input Time
- ⇒ Auto Date

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⇒ Auto Time

For more a detailed description of question types, see “ [Chapter 13: Questions in Detail](#)”.

### Note

A special type of question, to help with calculations & costing, is available in special versions of PocketSurvey. [Contact us](#) to find our more.

### Question Data Destination or Group Mode

Defines whether the answer to a particular question will be inserted into the Parent or the Child output data file, or not at all. For more information about data destinations, see “ [Chapter 3 — Terminology & Concepts](#)”.

**One-off** information should generally be directed to the parent file. For example general details about a house being surveyed.

**Repetitive** information that requires the same question to be asked more than once should be directed to the Child data file. For example, specific details about each room in a house being surveyed.

### Tip

Questions such as jumps or menu questions that, simply direct the user to another question, do not need to capture data and therefore should have a data destination of none

Questions with Parent, Child and None destinations can be mixed freely throughout a questionnaire but when the data is received back to the PC, it will be automatically organised into Parent and Child data files.

### Warning

If a question with a Parent data destination is answered more than once during a survey (random groups allow this), then only the most recent answer will be saved.

If multiple answers to a question are required the data destination should be set to Child.

## Question Definition Screen

Most of the time you will be defining questions in your questionnaire using the Questions screen shown below. This screen is easy to use but there are many types of questions you need to become familiar with.

A summary of question types is listed here but for more a detailed description of this screen, see “[Chapter 8 — Questionnaire | Question](#)” and “[Chapter 13 — Questions in Detail](#)”.

### Menu Choice – Single select or Multiple select

User may choose one or more answers from a list of choices. Used where answers are predictable, multiple choice questions make the resultant data quicker to record and easier to analyse than where free text has been used.

Can allow one or several choices from one list. A special item (Free text) allows the user to type an answer in, if no suitable choice is available on the list(s).

### Number

Entry of a number by user. Used where a predictable number is to be recorded, e.g. property code or serial number of equipment. Numbers have a pre-defined precision and optional range checking.

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### Text

Text questions prompt the user to enter text. Text length can be constrained by setting maximum and minimum lengths. Certain text conversions can also be applied.

### Formatted

Entry of formatted string by user. Used where a predictable code is to be recorded, e.g. property code or serial number of equipment.

### Jump Question Type

A means of skipping questions automatically in a sequential section, or jumping out of a random section.

### Question Type | Link

This enables you to link to another survey design. At run-time PocketSurvey will start another instance of itself with the survey name that you give here already loaded. The survey ID of the present survey will be concatenated with that of the linked survey with an optional delimiter between the two.

When the user comes to the end of the linked survey they will not be asked to confirm that they wish to quit. Instead, the linked survey will close and the present survey will continue.

### Auto Time

Enters date automatically from the handheld computer's clock in the format set on the handheld.

### Auto Date

Enters time automatically from the handheld computer's clock in the format set on the handheld.

### Input Time

Allows a user defined time to be entered for example to enter an appointment time.

### Input Date

Allows a user defined date to be entered for example to enter an appointment date.

### Calculated

#### Note

A special type of question, to help with calculations & costing, is available in special versions of PocketSurvey. [Contact us](#) to find out more.

## Shortcut Keys

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The main PocketSurvey functions are accessible using shortcut keys.

Shortcut Key	Action
CTR L + O	Opens a named a questionnaire
CTR L + S	Saves a questionnaire
CTR L + C	Copy the currently selected block of questions to the clipboard
CTR L + X	Cut the currently selected block of questions to the clipboard
CTR L + V	Paste the clipboard contents
ALT + F4	Close PocketSurvey
F1	Launches the online manual.

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