

## Chapter 5: Creating a Questionnaire

We know you are anxious to see what PocketSurvey can do so this chapter will show you how to create your first questionnaire as quickly as possible. Consider it a fast track chapter. However, it is not a substitute for following through the examples and samples, or indeed reading the rest of this manual!

More detailed information on creating questionnaires and an in depth look at the facilities available in PocketSurvey can be found in later parts of this manual. Good luck!

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#### Tip

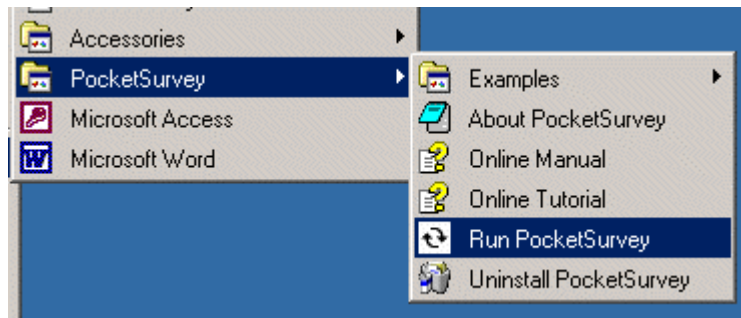
Why not attend one of our training courses? For more information, contact Handheld Systems Ltd for details.

## Running PocketSurvey

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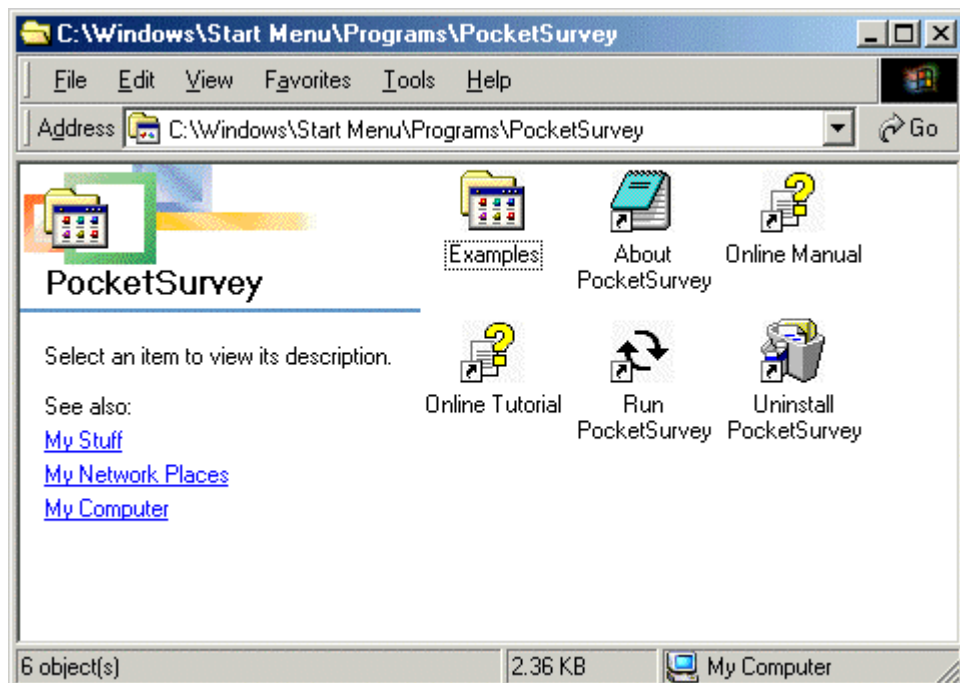
### From the Start menu

You can run PocketSurvey from the standard Windows Start menu as shown below. Choose the Run PocketSurvey option.



### From your desktop

You can also run PocketSurvey group by clicking on the desktop icon which then displays the following screen. Choose the Run PocketSurvey icon.

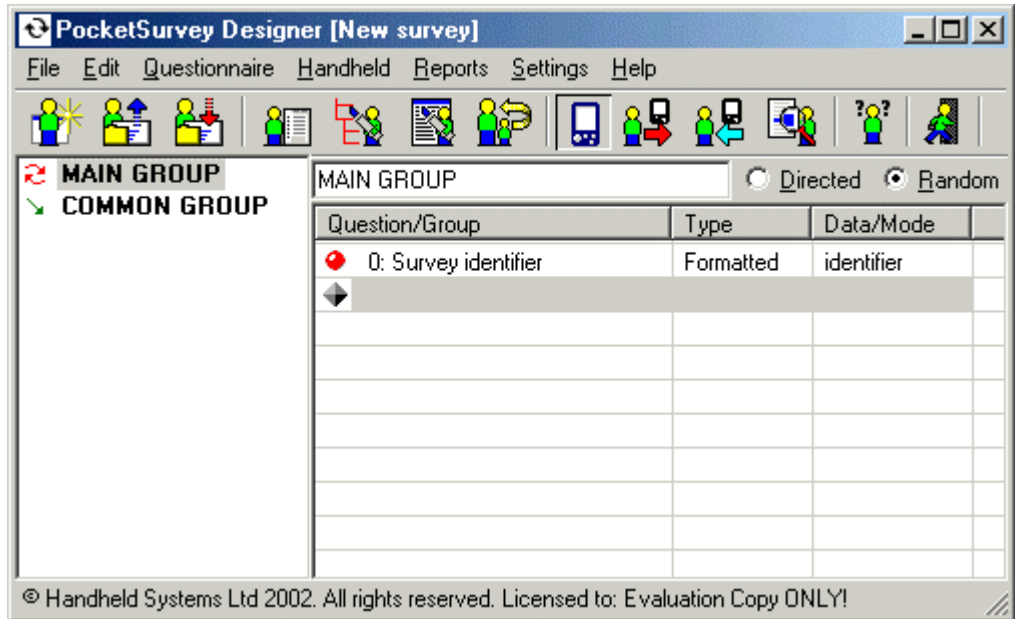



<b>Tip</b>	<p>If you work with PocketSurvey often you might like to create a desktop shortcut to launch PocketSurvey directly.</p> <p>To do this grab the 'Run PocketSurvey' icon with your right mouse button, drag it on the desktop and choose 'create shortcut' when you release the right mouse button.</p>
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**New questionnaire screen**

When you first run PocketSurvey you will see the main program screen as shown below. You will notice that it has an attractive and uncluttered screen layout with a menu, a toolbar a survey structure areas and a question area. For more a detailed description of the items on this screen, see “Chapter 3 — Quick Tour”.

You are now ready to create your first Questionnaire

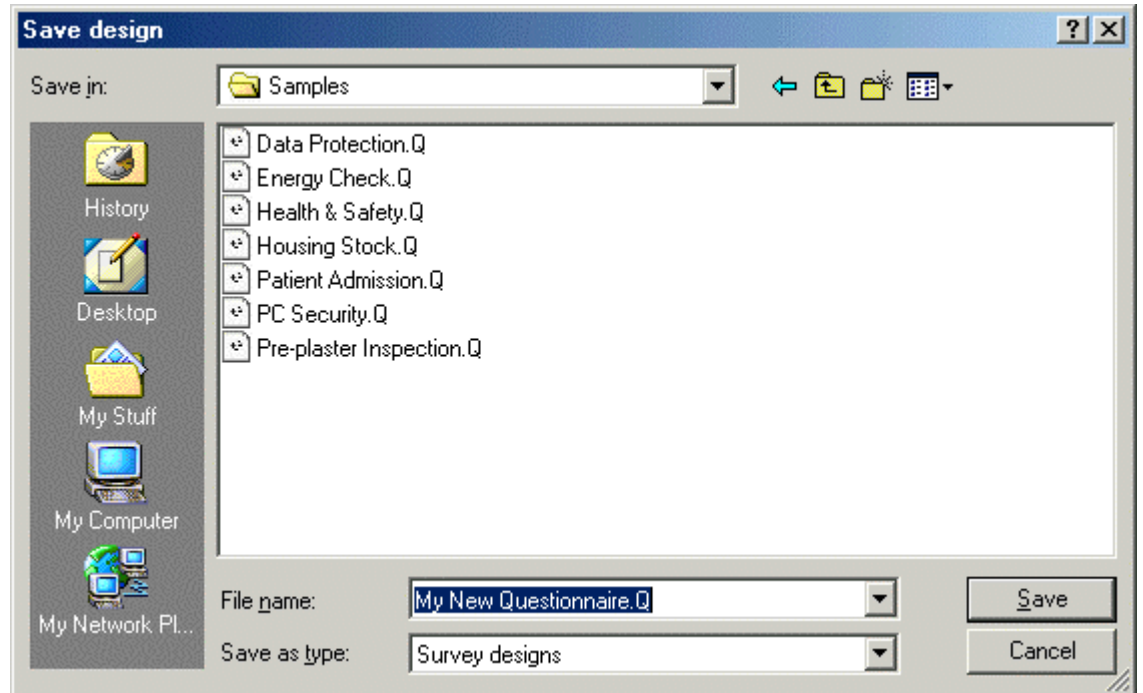


<b>Tip</b>	<p>To start a new survey at any time, choose <b>FILE   NEW</b> from the main menu bar or the click the toolbar button shown below.</p> <p style="text-align: center;">  <b>New Questionnaire</b> </p>
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The following sections give you an outline of how to go about designing your survey, test it and receive results back. For this example we are going to create a customer satisfaction questionnaire relating to PocketSurvey.

## Naming your Questionnaire

When you first start a questionnaire is a very good idea to give it with a meaningful name and store it in a folder of your own choice. You do this with the **FILE | SAVE AS** menu option.



You can store your surveys in any folder but we recommend you store your own surveys in the **POCKETSURVEY\SURVEYS\** folder rather than the **POCKETSURVEY\EXAMPLES\** or **POCKETSURVEY\SAMPLES\** folders.

Save your survey as “Satisfaction Survey”. If you want to cheat you will find the a completed survey in the Examples folder already!

### Tip

For more a detailed description of the **FILE | SAVE AS** menu option, see “[Chapter 6 – Menu | File](#)”.

## First Question

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All questionnaires must have at least one starting question to uniquely identify the answers to a set of questions. For example, first question could be the respondent's name if doing a customer satisfaction survey or the house being surveyed in the case of a stock condition survey.

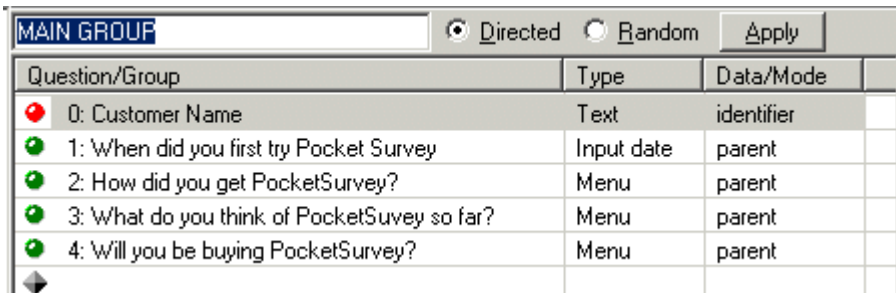
To change this mandatory first question follow these steps.

- 1 Double click on it in the question display area to show the following screen
- 2 Choose a question type to **text** and change the Survey Identifier option to read "**Customer name**"
- 3 Click **Apply** to accept your changes
- 4 Click **Close** to remove the screen from view.

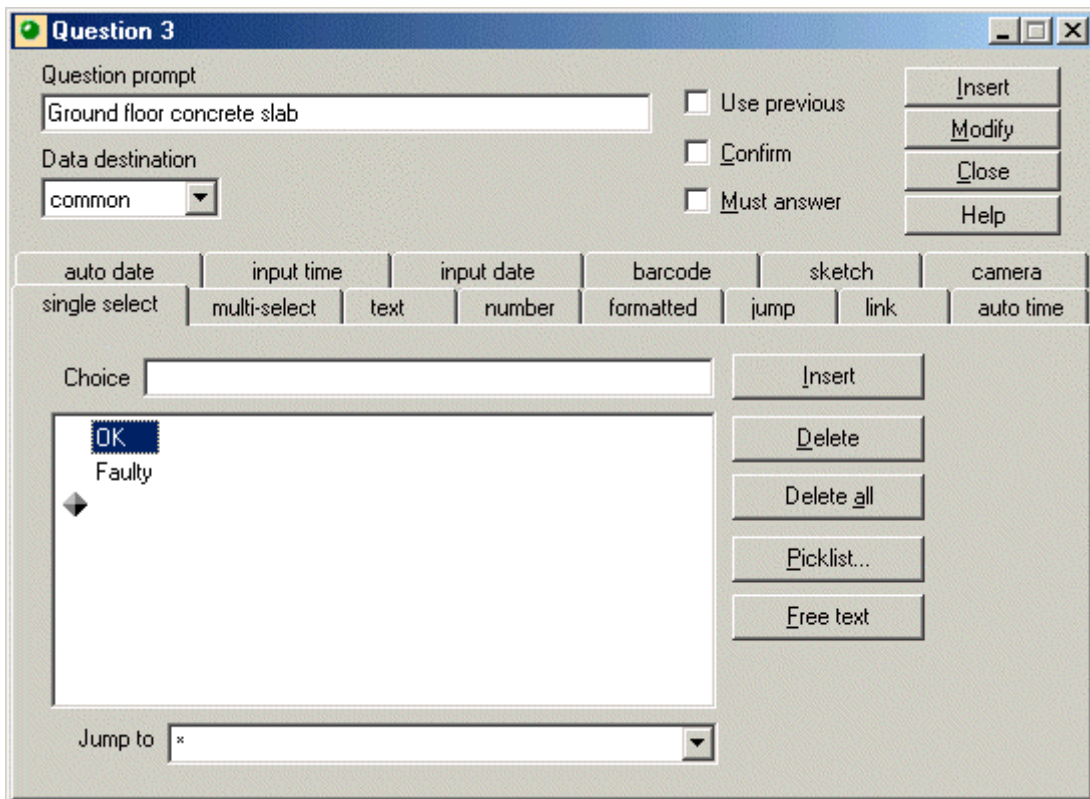
## Adding Questions

We are now going to add some questions to the survey. To add a new question at the end of a survey follow these steps.

- 1 Double click on the diamond at the end of the list of questions to display the question definition screen.



Question/Group	Type	Data/Mode
0: Customer Name	Text	identifier
1: When did you first try Pocket Survey	Input date	parent
2: How did you get PocketSurvey?	Menu	parent
3: What do you think of PocketSurvey so far?	Menu	parent
4: Will you be buying PocketSurvey?	Menu	parent



**Question 3**

Question prompt:

Data destination:

Use previous  
 Confirm  
 Must answer

Buttons: Insert, Modify, Close, Help

Input types: auto date, input time, input date, barcode, sketch, camera, single select, multi-select, text, number, formatted, jump, link, auto time

Choice:

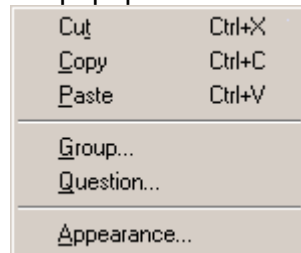
Buttons: Insert, Delete, Delete all, Picklist..., Free text

Jump to:

- 2 Change the question text to read “**When did you first try PocketSurvey**” and select a question type of ‘**input date**’.
- 3 Click the **Insert** button to insert the question.
- 4 With the question definition screen still on display, you can add more questions very quickly by entering the **question text**, selecting the **question type** and clicking the **Insert** button. Try defining a few more questions yourself.
- 5 When you have finished defining questions, click **Close** to remove the question definition screen from view.

**Tip**

To insert questions before other questions rather than the end, or to delete, cut or paste questions, simply click the right mouse button in the question display area and choose from the popup menu shown below.



**Tip**

For more a detailed description of types of questions you can use, see “[Chapter 8 — Questionnaire | Question](#)” and “[Chapter 13 — Questions in Detail](#)”.

## Changing Questions

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You don't have to worry about getting your survey questions right first time because changing question text and question types is very easy — you simply double click on the question in the question display area.

Furthermore, with the question definition screen open, you can move around different questions in display area by single clicking the left mouse button. Once you find the question you want to change, change the details on the screen and click the **Modify** button.

Also you can insert new questions on this same screen by typing in a new question and clicking the **INSERT** button.

### Tip

Don't forget to save your survey regularly by choosing **FILE | SAVE** from the main menu bar or clicking the toolbar button shown below.



**Save Survey**

## Changing Group Type

You will learn more about groups in other chapters of this manual, but the main thing you should know is that Groups are used to organise your questions and to allow the questions to be displayed sequentially or randomly when running the survey.

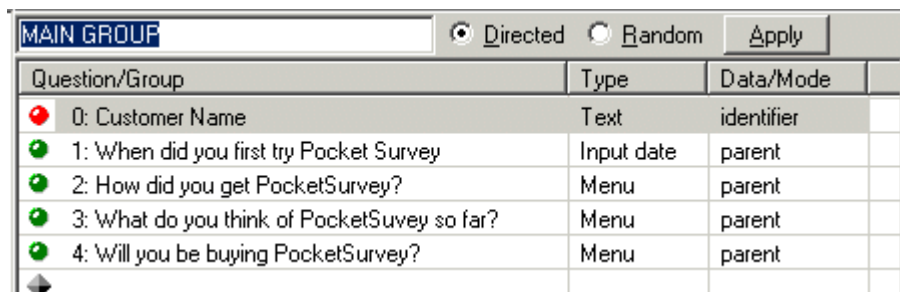
PocketSurvey always creates a Main group for you, and for a small survey like the one we are creating now it is often sufficient. However, we do want to change the type to Directed so all the questions are asked one after the other in the same sequence as in the survey design.

To change the Main group type of a survey follow these steps.

- 1 In the left hand survey structure area, click to highlight on the **MAIN GROUP**. You will see the questions you have defined in this group in the questions display area.



- 2 At the top of this questions display area you will see the group name and two radio buttons indicating the group type.



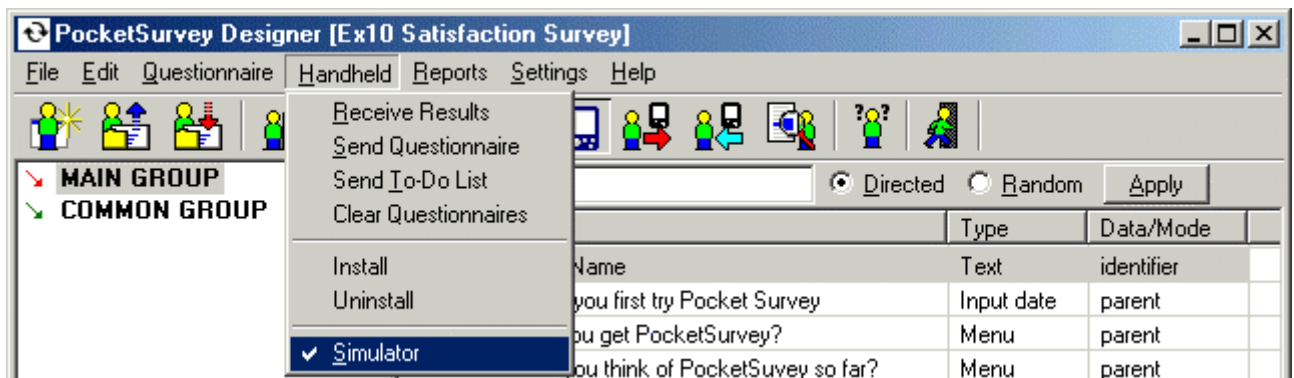
- 3 Click the **Directed** radio button to change the group type.
- 4 Click the **Apply** button that appears next to the radio buttons to apply this change to your survey.
- 5 Save your survey using **FILE | SAVE**.

## Testing Your Questionnaire

Normally you would send your questionnaire design to one or more mobile devices such as pocket PCs and get your mobile workforce to conduct the surveys out in the 'field'. Then you would receive the result back to your desktop computer, run some of the quick PocketSurvey reports and import the data into your chosen data analysis tool.

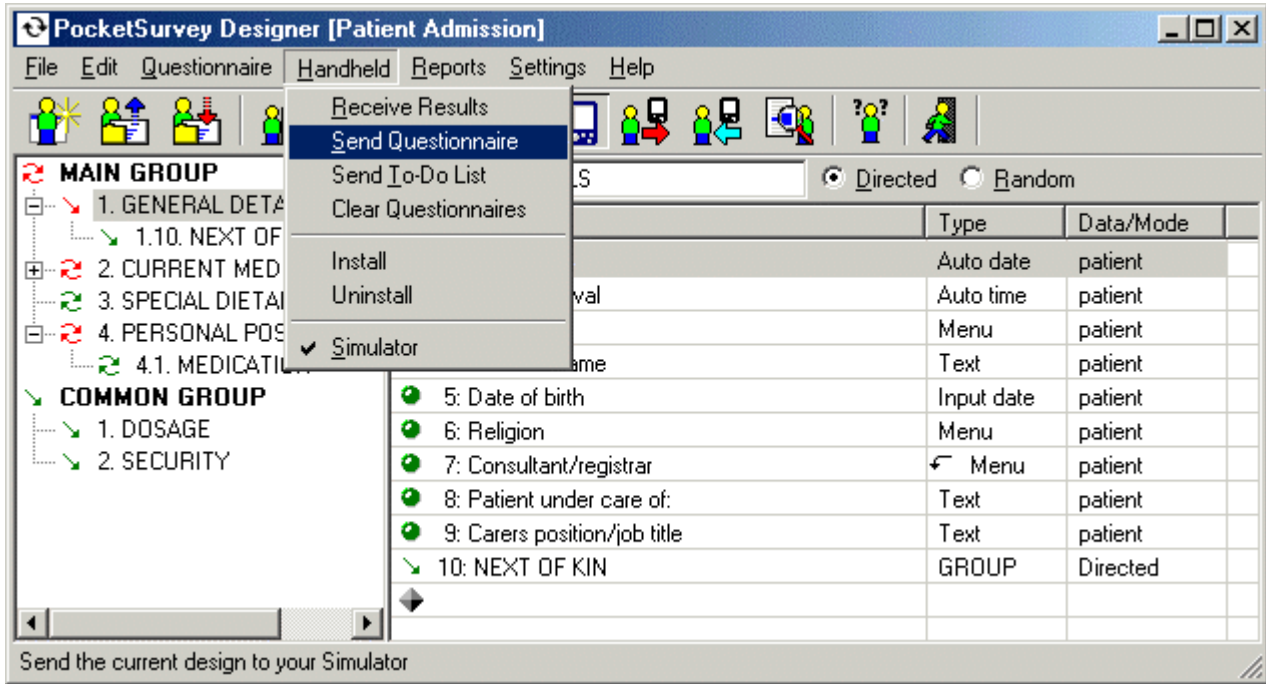
However, with the in built-in handheld simulator you can do all this on your desktop PC without even having a handheld computer! You use the handheld simulator to test your surveys but you can also run surveys for 'real' on your office PC if you wish. Follow these steps.

- 1 On your PC select the **HANDHELD | SIMULATOR** menu option to use the in-built simulator.



Simulator Toolbar Button

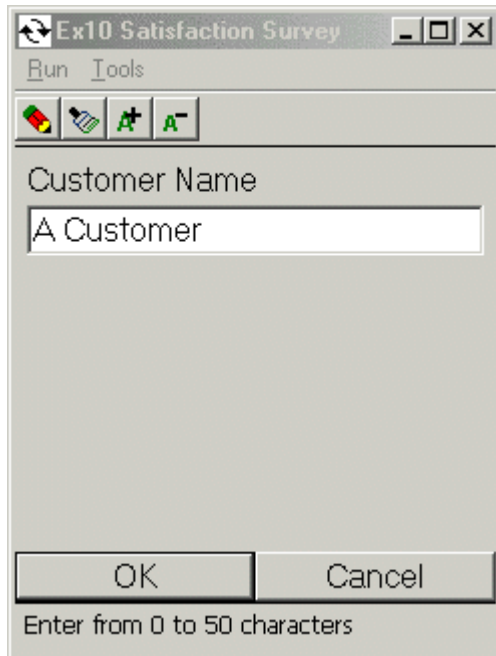
- 2 On your PC select the **HANDHELD | SEND QUESTIONNAIRE** menu option to send the survey to the simulator.



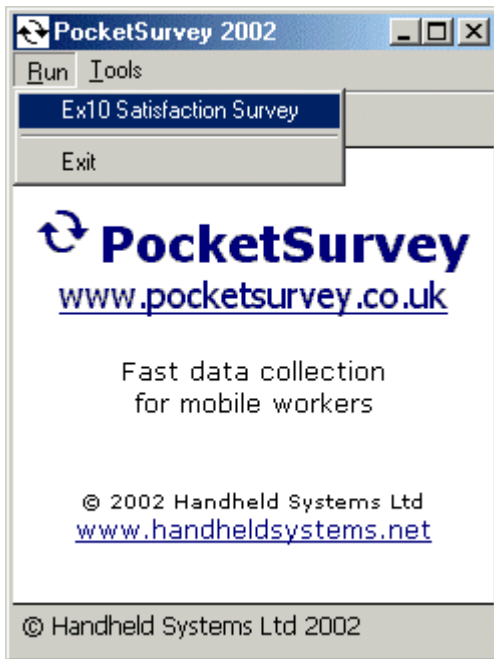
**Send Questionnaire Toolbar Button**

### Chapter 5: Creating a Questionnaire

- 3 Once the simulator is launched and the questionnaire sent to it, you can run your survey.



After you have captured data for one customer select the **RUN** menu option on the simulator to run the survey again for a different customer.



- 4 When you have finished collecting data select the **HANDHELD | RECEIVE RESULTS** menu option to transfer the answers to the survey from the handheld simulator to your PC ready for reporting and subsequent analysis.



**Receive Results Toolbar Button**

- 5 Finally to see the data captured by your survey select **REPORTS | RESULTS** menu option. The results report will be displayed in your preferred web browser.



**Report Results Toolbar Button**

## Running Surveys on the Handheld

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Running surveys on your handheld is very similar to testing your survey, the main difference is that you are communicating with your handheld via Microsoft ActiveSync.

### Warning

Before using PocketSurvey with your handheld you need to ensure ActiveSync is working correctly with your handheld and PC. ActiveSync is a Microsoft program and is therefore supported by them or your hardware supplier.

However, you will find some useful tips on ActiveSync, see “[Appendixes — ActiveSync](#)”.

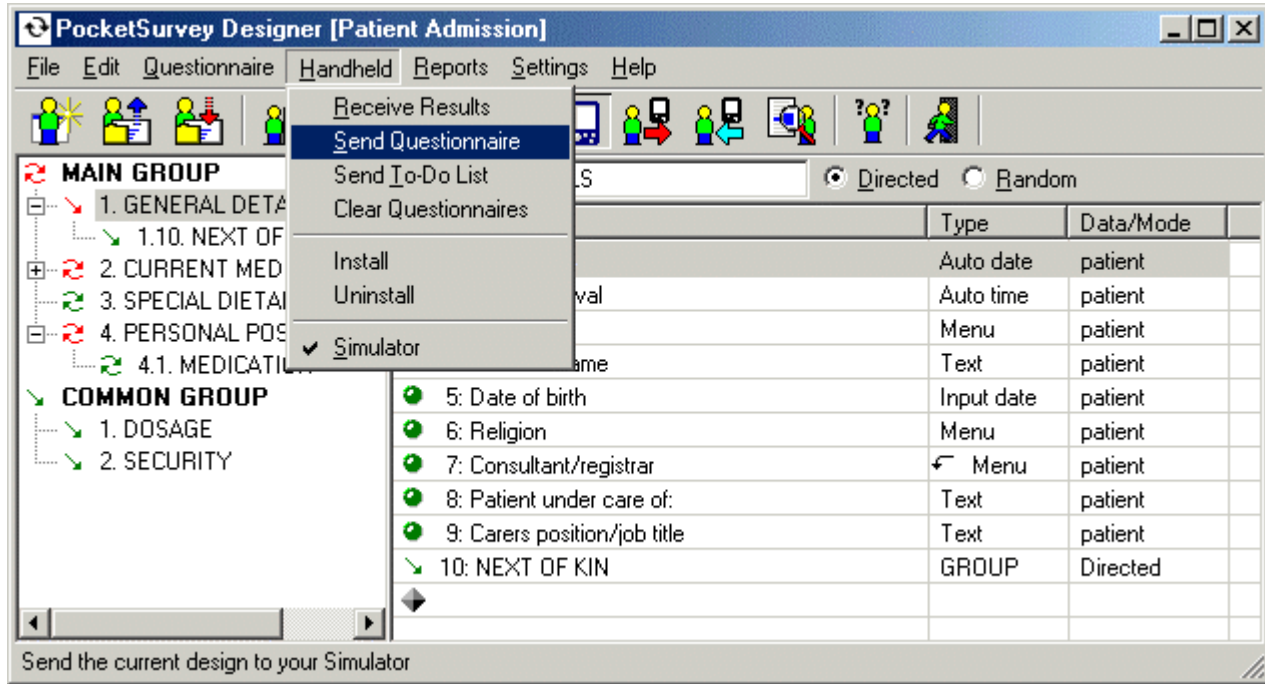
To run surveys on your handheld follow the steps outlined below.

- 1 On your PC turn off the simulator by clicking the simulator button.



**Simulator Toolbar Button**

- 2 On your PC select the **HANDHELD | SEND SURVEY** menu option to send your questionnaire to your handheld CE device.

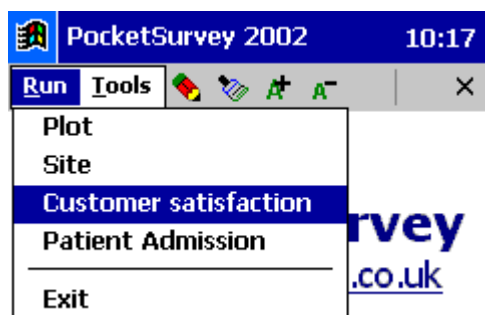


**Send Questionnaire Toolbar Button**

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- 3 On your handheld select **POCKETSURVEY** from the Start menu on your pocket PC. Once PocketSurvey is started on your handheld you can choose a survey form the PocketSurvey **RUN** menu option.

After you have captured data for one customer select the **RUN** menu option to run the survey again for a different customer.



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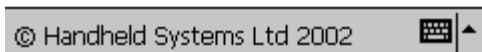
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- 6 When you have finished collecting data, close PocketSurvey on your handheld by clicking the **X** on the menu bar.



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- 7 Back on your PC select the **HANDHELD | RECEIVE RESULTS** menu option to transfer the answers to the survey from the handheld to your PC ready for reporting and subsequent analysis.



**Receive Results Toolbar Button**

- 8 Finally to see the data captured by your survey select **REPORTS | RESULTS** menu option. The results report will be displayed in your preferred web browser.



**Report Results Toolbar Button**

## Finally!

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Hopefully you found this chapter easy and created and tested your first questionnaire survey in only a few minutes.

However, we are sure you have a number of areas that you do not understand fully yet. Don't worry, read through the rest of this manual, try the examples, samples and tutorials and above all, experiment with the software and you will find it easy and intuitive to use.

### Tip

The main sequence of events after designing your survey is:



**Save questionnaire**



**Turn simulator on or off**



**Send questionnaire**



**Receive results**



**Show results report**

If you still have any unanswered questions while you are evaluating this software do not hesitate to **contact us**. If you are a licensed user you might like to consider attending one of our training courses or obtaining a support contract.

Good luck!