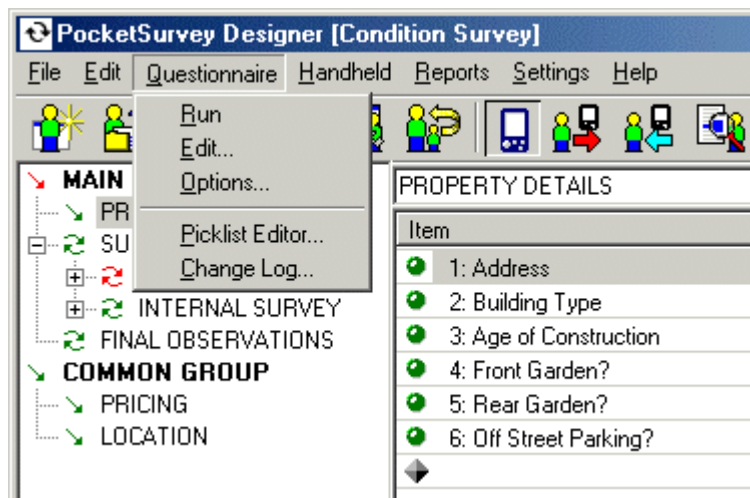


Chapter 8: Menu | Questionnaire

The **QUESTIONNAIRE** menu, shown below, controls the overall format and content of your questionnaire. It is probably the most important menu because it has options to run your survey on the simulator and create/amend groups and questions — the heart of a questionnaire design!

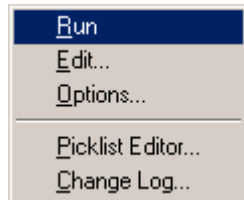


Chapter Contents

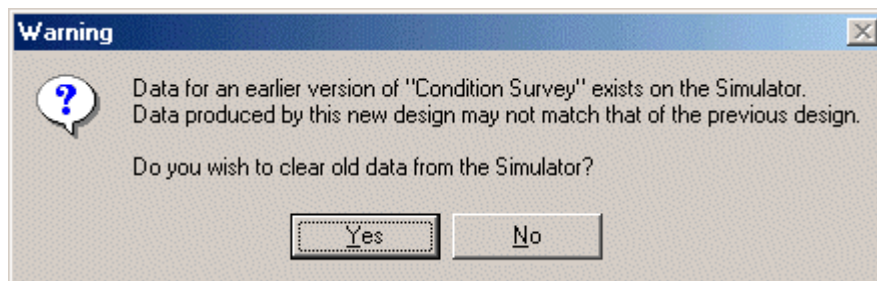
- Questionnaire | Run
- **Questionnaire | Edit...**
- Questionnaire | Options...
- Questionnaire | Picklist Editor...
- Questionnaire | Change Log...

Questionnaire | Run

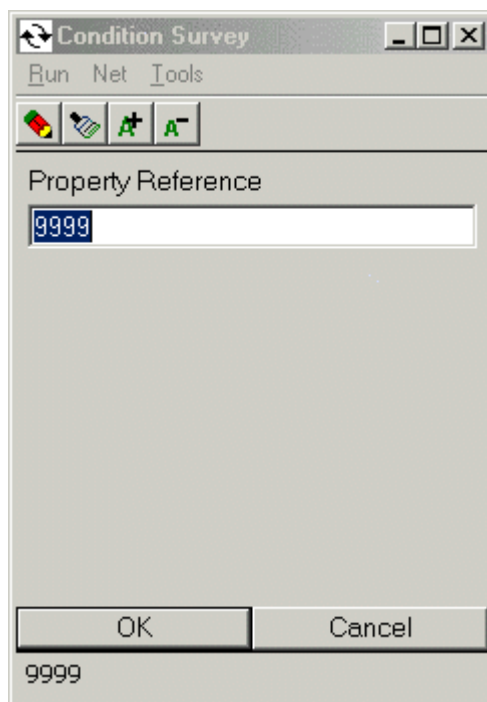
The **Questionnaire | RUN** menu option, shown below, sends the currently loaded survey to the simulator and runs it immediately.



If data has already been collected using the simulator, you will see the warning message shown below asking you if you wish to clear old data from the simulator. If you are testing you would normally choose 'Yes', but if you wish to keep previously collected data you would choose 'No'.

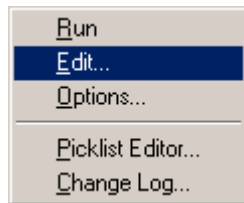


After a brief confirmation message indicating your survey has been successfully sent the survey is run in the simulator as shown below.



Questionnaire | Edit

The **QUESTIONNAIRE | EDIT...** menu option and toolbar button, shown below, displays the **EDITOR** screen that allows you to insert or modify **questions** or **groups** into your questionnaire.



Toolbar Button

Note

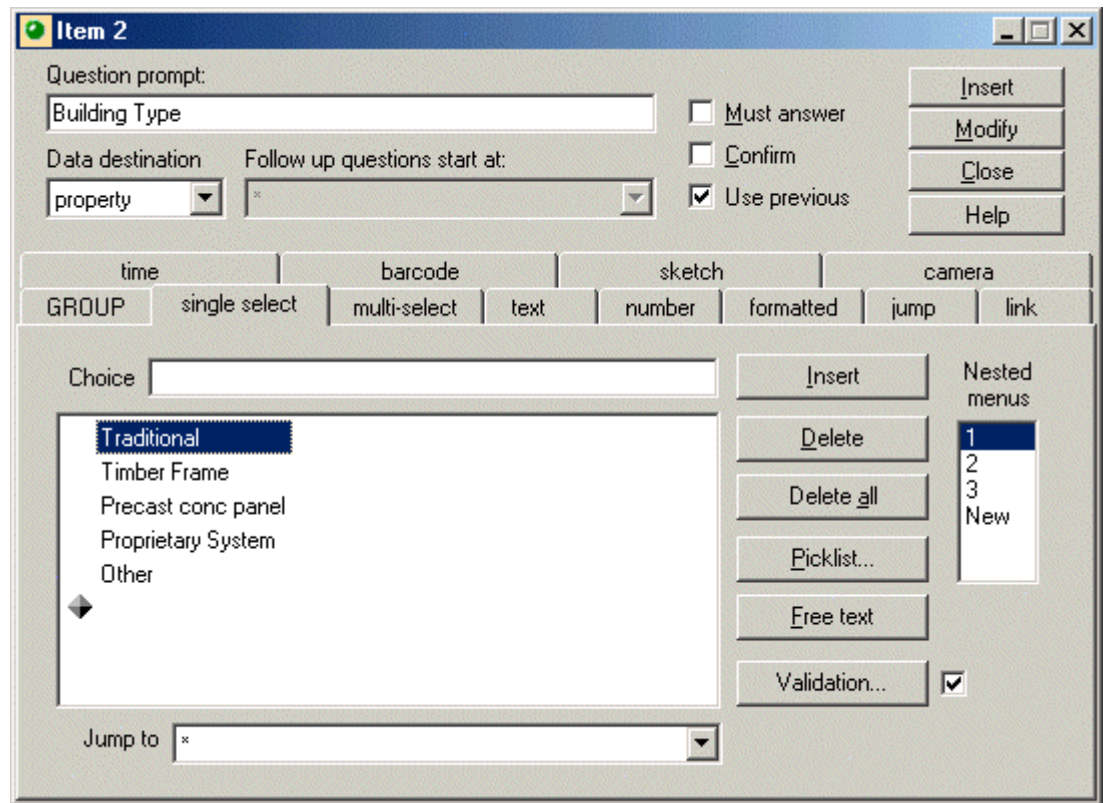
This section of the manual explains how the item editor screen works and summarises the different question types available. However, since questions are the main component of a questionnaire or survey, you should also read the two chapters described below.

- For a detailed explanation of the question display area, see “[Chapter 4: Quick Tour — Question Display Area](#)”.
- For a detailed explanation of the different question types, see “[Chapter 13: Questions in Detail](#)”.



Item Editor Screen - Questions

The **QUESTIONNAIRE | Item Editor** screen is a special tabbed screen that allows you to change between question type without losing any common information. It also lets you insert or modify groups. For a detailed explanation of the options for different question types, see “[Chapter 13: Questions in Detail](#)”.



Question Prompt

This is the text that will be displayed to the user when you run the survey to capture answers.

Data Destination

Defines where the result of answering a particular question will be directed. For more a detailed discussion of how questions map on to data, see “[Chapter 3: — “Questions and Collected Data”](#)”.

Follow Up Questions Start At

If you want to follow the current question with a series of common questions you choose the starting question or group from the list. If you are working on questions within the 'Common Group' then this item will not appear on the dialog.

Use Previous

If you ask a question more than once in a survey, for example with questions in a common group, the answer may be similar to the previously answered question. To save the handheld user typing this in again, turn this option on to automatically display the previous answer to the question. The user can then accept the answer with the enter key or change it as required.

Confirm

Tick **CONFIRM** to prompt to the user running the survey to confirm their answer by accepting or retyping the answer as shown below

Must Answer

This forces the user to answer the question.

Commonly Used Buttons

The commonly used buttons **INSERT**, **MODIFY**, **CLOSE** and **HELP**, work as expected.

Inserting & Modifying Questions

If your mouse is positioned on a group name or at the end of the list (on the diamond) choosing question from the menu or toolbar will show an empty question screen prompting you to insert a question before the current cursor position.

However if your cursor is positioned on a question in the question/group display area the question screen will be displayed with the existing question details. You can then modify the details or type in different name and insert another question.

Speed Tip

Move around questions with a single click!

With the question screen open you can move around questions quickly and easily by single clicking on the question name in the item display area. You can then change the question details, click the modify button and move on the next question.

Summary of Question Types

For a detailed explanation of the options for different question types, see “[Chapter 13: Questions in Detail](#)”. This section summarises the type of questions available.

Menu Choice – Single select or Multiple select

User choice of 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. Allow the user to type 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.

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

A means of skipping questions automatically in a directed group, or jumping out of a random group.

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 identifier 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.

Time

Auto Time. Enters date automatically from the handheld computer's clock in the format set in **the SETTINGS screen**.

Auto Date. Enters time automatically from the handheld computer's clock in the format set in **the SETTINGS screen**.

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.

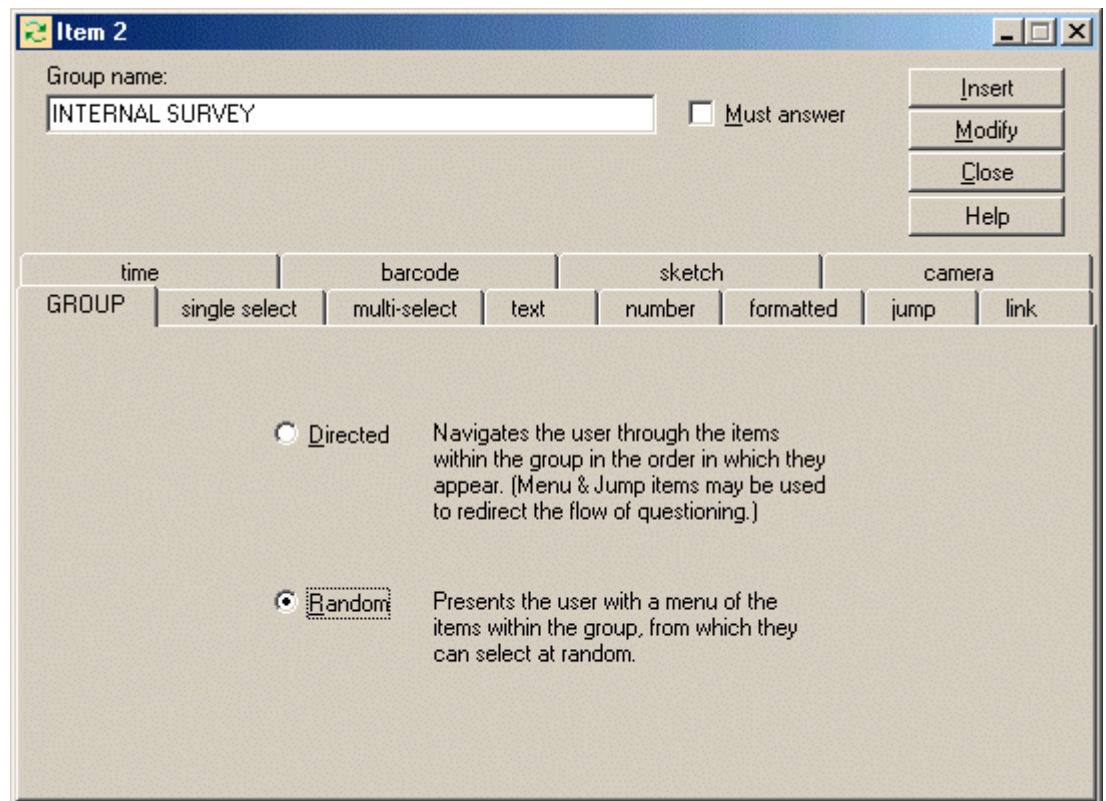
Note

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



Item Editor - Groups

The **GROUP TAB** on the item editor screen lets you insert or modify a group within a questionnaire design. For a detailed explanation of groups, see "[Chapter 3: — What are Groups?](#)".



Group Screen Options

The options for specifying or changing groups are described below. Apart from the title of the group you must specify whether it is a random group or a group that follows in a directed sequence and whether the group must be answered.

Group Prompt or Title

Enter an alphanumeric string, with spaces if desired, to describe the group. You can write it like a short phrase or sentence.

Must answer

Forces the user to enter the group when running the survey.

Mode

Random means that the questions within the group will be presented to the user just like a menu, with the menu title will being the group name. The user can then choose answer (and re-answer) the questions in any order.

Directed means the questions within the group are presented to the user in the same order as they appear in the survey design.

Insert Button

Insert a new group above the current cursor position. Remember that group names must be unique in a questionnaire

Modify Button

Modifies the details of the currently selected group.

Commonly Used Buttons

The commonly used buttons **CLOSE** and **HELP**, work as expected.

Speed Tip	<p>Move around groups with a single click! With the item editor screen open you can move around groups quickly and easily by single clicking on the group name in the item display area. You can then change the group details, click the modify button and move on the next group.</p>
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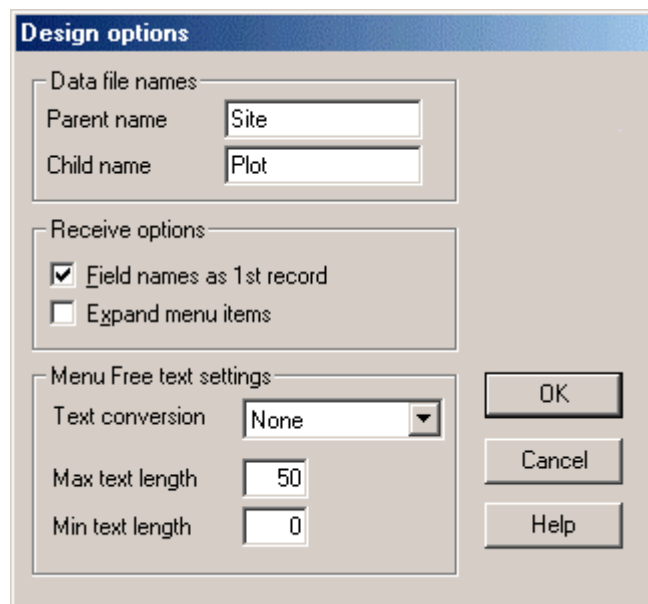
Questionnaire | Options

The **Questionnaire | OPTIONS** menu option and toolbar button, shown below, displays the questionnaire design options screen. These global options are fundamental to any questionnaire design and should be reviewed when you first start to design a new questionnaire.



Questionnaire Options Screen

The questionnaire design options, described in detail below, set some overall settings, and define how any subsequently collected results are identified and referenced.

The 'Design options' dialog box has three sections: 'Data file names' with 'Parent name' (Site) and 'Child name' (Plot) text boxes; 'Receive options' with 'Field names as 1st record' (checked) and 'Expand menu items' (unchecked) checkboxes; and 'Menu Free text settings' with a 'Text conversion' dropdown (None), 'Max text length' (50), and 'Min text length' (0) text boxes. On the right are 'OK', 'Cancel', and 'Help' buttons.

Data File Names

PocketSurvey lets you specify one of two data file destinations for the answer to an individual question. The terms used for these two possible data destinations are 'parent' and the 'child'.

In this screen you can choose the actual names for the parent and child data files, e.g. 'father' and 'son', 'house' and 'rooms', or 'plot and 'house'.

For more information on how data is structured and stored in PocketSurvey, see "[Chapter 3: Terminology & Concepts — Questions and Collected Data](#)".

Receive Options

Field names as 1st record

This affects the way that data is received from the handheld computer. Tick this option to force the inclusion of header records into the output data files. The data files received from the handheld or simulator will then be preceded by a row containing the PocketSurvey question texts separated by commas.

You would use this option to allow a database system to correlate the results of individual questions to database fields of that name when they are not necessarily in the same order as the original **PocketSurvey** questions.

The decision on whether to check this box depends on how you will import data into your database or spreadsheet program. Some databases can use names in the first row of import files to direct the data in that position on the following rows to fields with the same name in the database. This makes for more sophisticated handling of the data than just reading the fields sequentially into the fields of the database. Similarly, some databases and spreadsheets can use this information to name fields or column parents when auto-creating a new table from the incoming data.

Expand picklist menu items

If you have used a picklist (PICKLIST.DATA) to create some of your multiple choice questions you may wish to have the full description returned in the output files although the short item will have been used for convenience on the handheld.

Tick this option to expand short answers from the picklist used in multiple choice questions to their longer descriptions when data results are received.

Note

Some users make use of this feature to return a work item code to the output file rather than the description that was used on the handheld. Whatever characters are contained in the description will be returned to the output file if this feature is selected.

Menu Free Text Settings

Menu questions may, optionally, have a special item called 'Free text'. This item, if chosen, allows users to enter text manually, in which case the settings defined here will apply.

None

Accepts the text exactly as entered by the user.

Uppercase

Forces all text into upper case.

Chapter 8: Menu | Questionnaire

Lowercase

Forces all text into lower case.

Sentence

Automatically capitalises sentences.

Title Case

Capitalises each word

Max Text length

Maximum text length is inclusive and the user will be prevented from exceeding it when answering a text type of question.

Min Text length

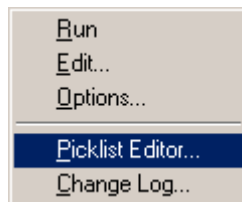
If the minimum text length = 0, then the user may skip the question without entering any text. Any other value will mean that the user must enter at least that many characters before continuing.

Commonly Used Buttons

The commonly used buttons **OK**, **CANCEL** and **HELP**, work as expected.

Questionnaire | Picklist Editor...

The **Questionnaire | PICKLIST** menu option, shown below, displays the picklist screen that lets you pre-define categories of items that can be used in answers to multiple choice questions in one of more questionnaires.



Note

The picklist is a special file named PICKLIST.DATA. It is created in the survey folder. If you want to share a picklist with multiple questionnaires simply move it to the folder above (the folder where the .Q file is).



Picklist Screen

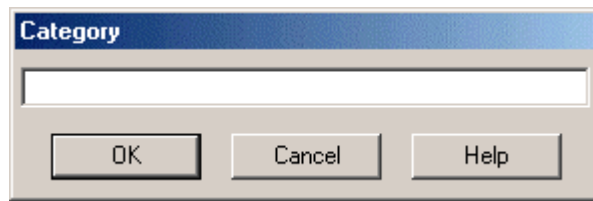
Apart from defining a list of possible answers to multiple choice questions you can also define a longer description, unit price and unit of measure for use in a multiple choice menu answer using this screen.

 A screenshot of a dialog box titled "Picklist items, descriptions & costs". At the top, there is a "Category" dropdown menu set to "INSPECTION", with "New" and "Edit" buttons to its right. Below this is a table with columns: "Item", "Unit price", "per: (UoM)", and "Description". The "Item" column contains a list: "Cables", "Ground Floor", "Joist Hangers", and "Staircase". The "Unit price" column has a text box with "0". The "per: (UoM)" column has a dropdown menu set to "No". The "Description" column has a text area containing "Electric cables checked and clipped where required". To the right of the table are buttons for "Insert", "Delete item", "Close", and "Help".

Item	Unit price	per: (UoM)	Description
Cables	0	No	Electric cables checked and clipped where required
Ground Floor			
Joist Hangers			
Staircase			

Category

Lets you define a category within which to group individual items. This helps you organise your items into logical groups. The **NEW** button displays the screen shown below. The **EDIT** button will show the same screen but with the category text shown.



Item

This is the short name for your item.

Unit Price

This is the unit price associated with an item. Unit price is used in cost calculations.

Unit Measure

This is the unit of measure associated with an item. Unit measure is used in cost calculations.

Description

This is the longer description for the item

Insert

This button inserts a new item.

Delete

This button deleted the selected item.

Commonly Used Buttons

The commonly used buttons **CLOSE** and **HELP**, work as expected.

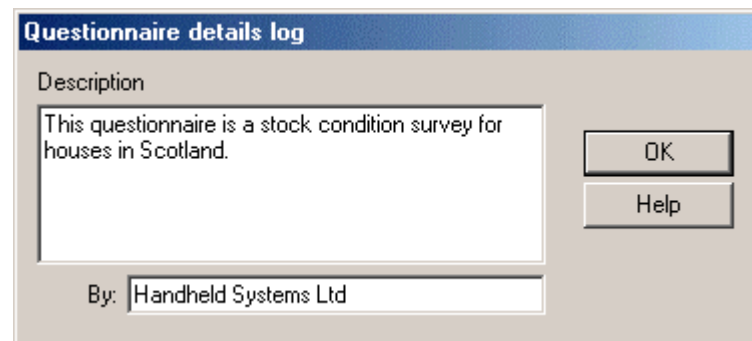
Questionnaire | Change Log...

The **Questionnaire | CHANGE LOG...** menu option, shown below, displays a screen listing the change history that you have documented for your questionnaire.

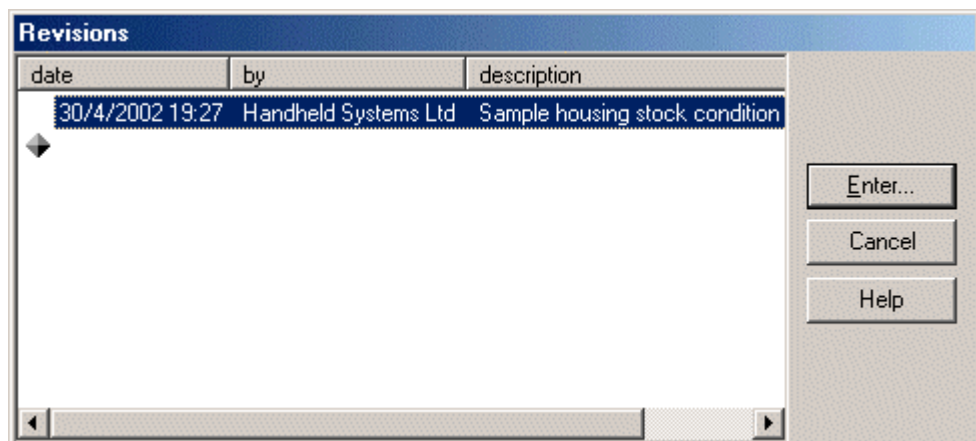


Note

When you first save a new questionnaire you are always prompted to enter the first log entry. Normally you would use this log entry to describe the overall purpose of your questionnaire.



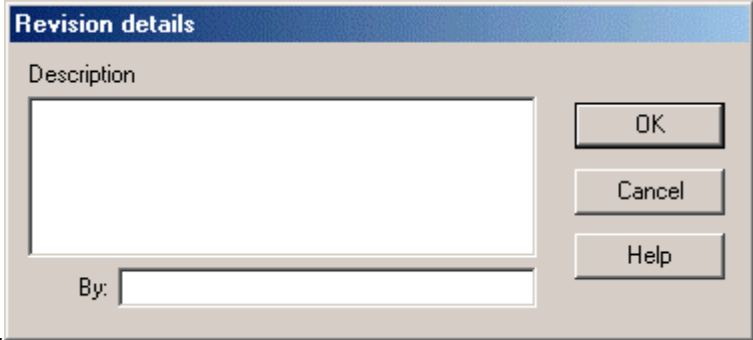
Changes Log Screen



Modify

Will display a screen for you to enter details of changed you may have made to your questionnaire. The date and time is automatically added to the log entry

Chapter 8: Menu | Questionnaire



Commonly Used Buttons

The commonly used buttons **OK**, **CLOSE** and **HELP**, work as expected.

