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PQF Software Tutorial

# Getting Started

Part 1: Design and Layout

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# Welcome!

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Welcome to the PQF *Getting Started* tutorial. We hope you'll learn enough about the basics of creating and collating questionnaires so that when you finish this tutorial you'll be ready to create lots of electronic forms of your own.

As this is a tutorial for people with varying skills and experiences, we will be using a simple example that covers many of the techniques you will use in much more complex questionnaires. The main aim of this *Getting Started* tutorial is to teach you the basic skills so that you can apply them to forms you create at your workplace.

In this tutorial you will learn how to:

- Design a draft questionnaire on paper so that you can clarify your ideas.
- Design a basic 3-form questionnaire about holiday destinations. As part of this process you will learn about branching questions, and various question elements such as option buttons, check boxes, text boxes, etc. along with naming fields in such a way that the data collected later has some meaning for you.
- Add very basic design elements to your questionnaire - a logo, a background colour, and some text colour.
- Produce an electronic form (PQF), and create a spreadsheet or database to store your results (this is really very easy!).
- Email the PQF to yourself - and then answer your own questions and email the responses back to yourself.
- Collate your responses and view your results.

Are you ready? Let's go!

## Where do I begin?

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You may have purchased the PQF software because you already have paper-based questionnaires and forms that you want to convert into an electronic format - and you especially want to automate the collection of the responses to eliminate the human error factor and the enormous amount of time taken to input the raw data.

This is exactly what PQF software can do for you!

In many cases, you will be starting from already existing forms and using PQF software to design electronic versions of them.

However, for this tutorial, you're going to design a questionnaire from the very beginning. Daunting? No! By designing a questionnaire from the beginning you will have a better understanding of how everything fits together when you come to apply these principles to your own forms.

## Scenario

This is your scenario:

*You have been asked to design a very basic questionnaire asking people where they would like to go for their next holiday. You want to know how many select overseas destinations, and how many select Australia as their destination. Of those who select Australia, you need to find out which states they would like to visit. Finally, you need to get an understanding of their ideal holiday destination, no matter what country they chose.*

## What do I do first?

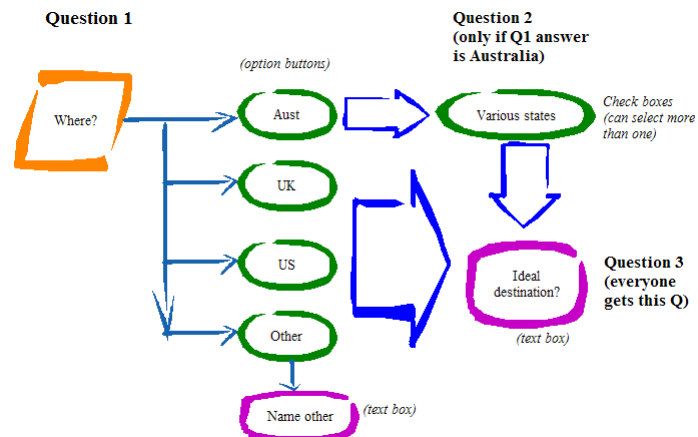
The first step in designing any questionnaire (or survey, or form) is to grab some paper and a pen and start drawing the basic outline of what you need to ask, when it needs to be asked in relation to the other questions, and how it will be asked. You also need to consider how certain responses may result in other questions being asked, and how you will bring everything back together for the final 'question' where the respondent clicks SUBMIT and sends the response to you.

While you are designing the rough outline of the questions on paper, you should also be considering how the data will be collected, such as what names do you want to use for each response to distinguish it from all other responses. Names such as 'Response 1', 'Response 2', etc. will have little meaning even a few days from now - and will have no meaning without some sort of key if someone else is to analyse your collated raw data from Excel or Access.

So, you have the scenario - now grab a pen and some paper and draw a rough outline of the questions you will ask, and how they will relate to each other.

## Here's an example we prepared earlier...

If your brain is already getting foggy, here's a rough outline that we prepared for you... it's not complete, but it IS enough to get started.



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## The question forms


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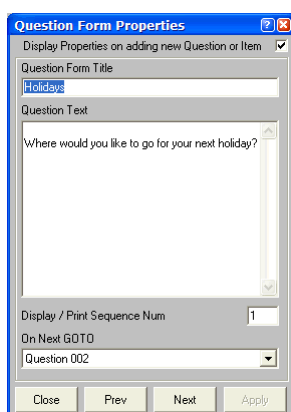
### The first question form



The first question in this scenario is a simple one - you need to ask where the respondents would like to go on holiday.

As there are more than 150 countries in world, you will narrow the possible responses down to three, plus 'Other'.


### Set up the form


- 1 Open PQF Author (double-click on the desktop icon). A new form is opened.
- 2 Before you go any further, click  to save this blank survey.  
The default directory where the PQF form will be saved is C:\Surveys\Documents.
- 3 Give this form a new name, **Holidays**, then click **Save**.  
PQF forms always have the file extension **SVM**. Once saved, the title bar in PQF Author changes to **[Holidays.svm]**.
- 4 In the Question Form Properties box that sits over the Question 001 form, complete the following details.
  - Question Form Title: **Holidays**
  - Question Text: **Where would you like to go for your next holiday?** (So that this text sits better on the form, press Enter and a space before 'Where'.)
- 5 Click **Apply** to save your changes.




- 6 Because you know there will be at least one more question, click  to add a new question.  
By adding a new question now, you can set up some options on the first question that will take the respondent to this next question. You won't fill in this new question form just yet.
- 7 Click  to go back to your first question.

## Set up the option button properties

- 1 In the toolbar, click . Two option buttons are added to the question form.

Why two? Option buttons are either selected or not - and only one can be selected no matter how many you have. So you need at least two to get a yes/no, true/false response.
- 2 You need to add another two options (remember, you're asking about three countries plus 'Other' - that's four altogether), so click  twice more.

This time the option buttons are added one at a time, because the mandatory two are already there. Notice how they line up perfectly under the other ones? Neat, huh!
- 3 In the toolbar, click . This adds a text box that will be used for those who select 'Other' to give their own response.
- 4 On the form, click on the first option button - this selects both the button and its label and opens the Option Button Properties box.
- 5 Complete the details in the Option Button Properties box as follows:

**Note:** You MUST click **Apply** after each field, otherwise your changes won't save.

  - Associated Label Text: **Australia**
  - Selected Field Value: **Aust** (always type a meaningful name for the field value - this is abbreviated, but is still recognisable)
  - Enable Simple Option Button Branching: Select this check box
  - On Selection GOTO: Select **Question 002** (you set it up earlier, remember?)
  - Database Field Name: **Country** (like field value, always type a meaningful name for the field name)
- 6 Click **Apply**, then click **Next**.

The next option button is selected and the Option Button Properties box is refreshed with that option's default details.
- 7 Complete the details for the second option button as follows:

**Note:** You MUST click **Apply** after each field, otherwise your changes won't save.

  - Associated Label Text: **UK**
  - Selected Field Value: **UK**




The Enable Simple Option Button Branching check box should already be selected, and the Database Field Name should be **Country** - leave these selections as they are.
- 8 Click **Apply**, then click **Next**. The next option button is selected and the Option Button Properties box is refreshed with that option's default details.
- 9 Complete the details for the third option button as follows:

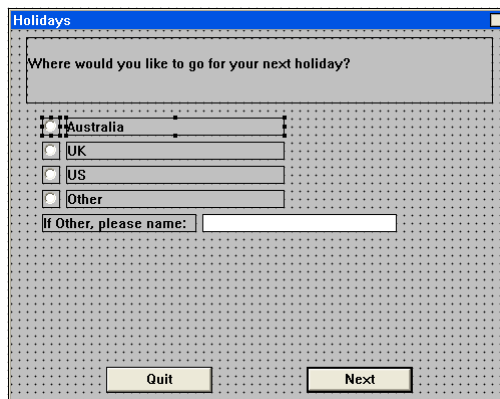
**Note:** You MUST click **Apply** after each field, otherwise your changes won't save.

  - Associated Label Text: **US**
  - Selected Field Value: **US**
- 10 Click **Apply**, then click **Next**. The next option button is selected.
- 11 Complete the details for the fourth option button:

**Note:** You MUST click **Apply** after each field, otherwise your changes won't save.

  - Associated Label Text: **Other**

- Selected Field Value: **Other**
- 12 Click **Apply**, then click **Next**. The text box is selected and the Text Field Properties box is opened.
- 13 Complete the following details for the text field; leave the other settings as they are:
- Note:** You MUST click **Apply** after each field, otherwise your changes won't save.
- Associated Label Text: **If Other, please name:**
  - Database Field Name: **CountryOther**
- 14 Click **Apply** to save the changes.
- 15 To check how your first question form looks, click  on the toolbar. You'll notice that the label for the 'If Other' text box doesn't display all the words.
- 16 Close the test form, then click on the text box - it and its label are both selected. Move the mouse over the far right centre 'handle' of the text box until it turns into a double-headed arrow, then click and drag the right edge further to the right. Repeat for the text box's left edge, then do the same for the label's right edge.
- You may need to fiddle with this a bit - it takes a little while to get the hang of dragging these handles! Don't despair - we've all been through it!
- 17 Test the form again by clicking  again. Close the form and make any further adjustments.
- 18 So you don't lose any of your good work, click .



Holidays

Where would you like to go for your next holiday?

Australia

UK

US

Other

If Other, please name:





Quit Next

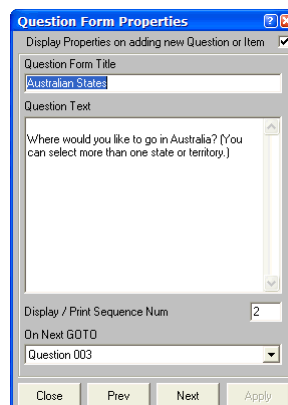
## The second question form

You created the second question when you were in the first question, so now all you need to do is add the information for it.

The second question in your form will only be seen by those who select **Australia** as their holiday destination. This is a simple branching question - this selection takes the respondent to a different 'next' question than the one displayed to respondents who select another country.

## Set up the second question form

- 1 On the toolbar, click . The Question 002 form is displayed, along with the Question Form Properties window for this question.
- 2 In the Question Form Properties box complete the following details:
  - Question Form Title: **Australian States**
  - Question Text: **Where would you like to go in Australia? (You can select more than one state or territory.)** (So that this text sits better on the form, press Enter and a space before 'Where', and Enter and a space before '(You'.)
  - On next GOTO: Leave this as it is for now - you'll change it after you've set up the third question form.
  - Click **Apply** to save your changes.
- 3 As respondents can choose more than one option, you will use check boxes for the question choices. On the toolbar, click  eight times (there are 6 states and 2 territories - a total of eight). As with the option buttons on the previous question, these all line up neatly for you.
- 4 Before you work on the check box properties, click  to add another question to the survey - you'll complete this later.
- 5 Click  to go back to your previous question.

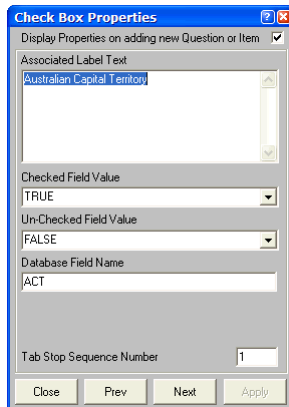


## Set up the check box properties


Now you have to set the properties for each check box.


You will use the same process for each, but will change the values to reflect the different state and territory names. So that there is no implied 'favouritism', list the states and territories in alphabetical order.

- 1 Click on the first check box to select both the check box and its label. The Check Box Properties window for Check Box Text 01 is displayed.
- 2 Complete the following details on this Properties window:
  - Associated Label Text: **Australian Capital Territory**
  - Checked and Un-Checked Field Values: Leave these as they are
  - Database Field Name: **ACT**



- 3 Click **Next** to go to the second check box, then complete the following details:
  - Associated Label Text: **New South Wales**
  - Database Field Name: **NSW**
- 4 Click **Next** to go to the third check box, then complete the following details:
  - Associated Label Text: **Northern Territory**
  - Database Field Name: **NT**
- 5 Click **Next** to go to the fourth check box, then complete the following details:
  - Associated Label Text: **Queensland**
  - Database Field Name: **QLD**
- 6 Click **Next** to go to the fifth check box, then complete the following details:
  - Associated Label Text: **South Australia**
  - Database Field Name: **SA**
- 7 Click **Next** to go to the sixth check box, then complete the following details:
  - Associated Label Text: **Tasmania**
  - Database Field Name: **TAS**
- 8 Click **Next** to go to the seventh check box, then complete the following details:

- Associated Label Text: **Victoria**
  - Database Field Name: **VIC**
- 9 Click **Next** to go to the last check box, then complete the following details:
- Associated Label Text: **Western Australia**
  - Database Field Name: **WA**
- 10 Click **Next** to return to the Question Form Properties window.
- 11 In the **On Next GOTO** field, select **Question 003** if it is not already selected.
- 12 Click **Apply** to save the changes.
- 13 So you don't lose any of your good work, click .



Australian States

Where would you like to go in Australia? (You can select more than one state or territory.)

- Australian Capital Territory
- New South Wales
- Northern Territory
- Queensland
- South Australia
- Tasmania
- Victoria
- Western Australia


Previous Next

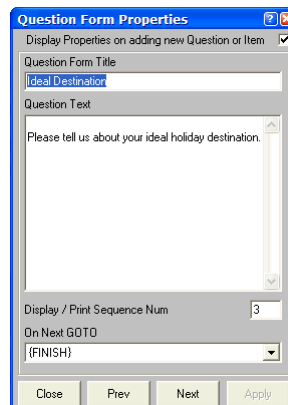
## The third question form

All respondents will see the third question form in the questionnaire.

Those who selected a destination other than Australia will see it displayed as their second form, while those who selected Australia had the state choices displayed on their second form, so this one will be the third one that they will see. Within PQF Author, this is called the third question form, even though not everyone will see it as their third question.

## Set up the third question form

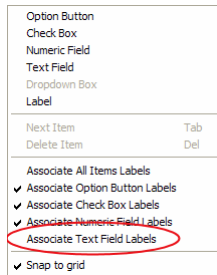
- 1 On the toolbar, click . The Question 003 form is displayed, along with the Question Form Properties window for this question.
- 2 In the Question Form Properties box complete the following details:
  - Question Form Title: **Ideal Destination**
  - Question Text: **Please tell us about your ideal holiday destination.** (So that this text sits better on the form, press Enter and a space before 'Please'.)
  - On Next GOTO: Select **{FINISH}**
- 3 Click **Apply** to save the changes.




## Set up the text field properties


You want respondents to answer as freely as possible, so you will use a memo text field for the response to the 'Ideal Destination' question. This allows them an almost unlimited number of characters that they can type in response to this question.

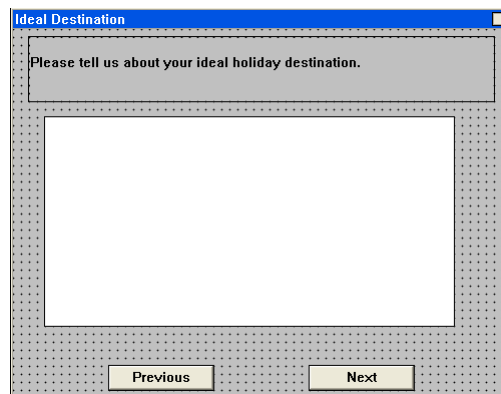
- 1 Because you only want a response and don't need a label for the text box, select **Item** from the menu. The **Associate Text Field Labels** option is ticked by default. Select the **Associate Text Field Labels** option - this removes the tick and allows you to just insert a text box without a label.



- 2 On the toolbar, click . The Text Field Properties window is displayed, and only a text box is added to the question form.
- 3 In the Text Field Properties window, complete the following details:
  - Use 'Memo' Data-Type (not 'Text'): Select this check box. When you make this selection, the Wrap Text check box is also selected - leave this check box selected.
  - Database Field Name: **IdealDest**
- 4 Click **Apply** to save the changes.



Now, you'll need to resize the text box on the question form so that it gives a visual indication to respondents that they can type in more than just a word or two.

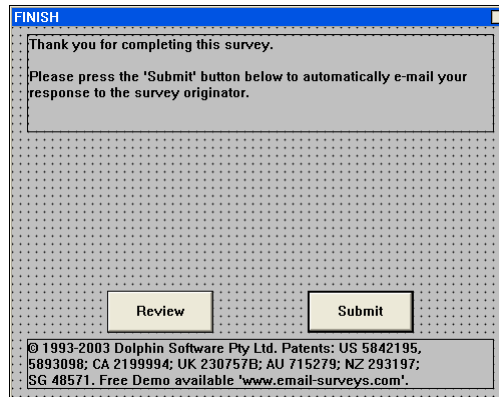
- 1 Move the mouse over the far right centre 'handle' of the text box until it turns into a double-headed arrow, then click and drag the right edge further to the right. Repeat for the text box's bottom edge. Make any other adjustments required.
- 2 So you don't lose any of your good work, click .



## The final question form

A lot of the hard work is already done for you on the final question form!

- 1 Click  to display the Finish question form and its Last Question Form Properties window.
- 2 You can change the following details if you don't like the default text:
  - Last Question Form Title
  - Question Text
- 3 You can also change the text on the buttons if you want to, but for this tutorial keep the default button text.
- 4 If you made any changes to this form, click **Apply**, then click  to save the entire PQF form.



FINISH

Thank you for completing this survey.

Please press the 'Submit' button below to automatically e-mail your response to the survey originator.

Review Submit







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## Set up the question paths

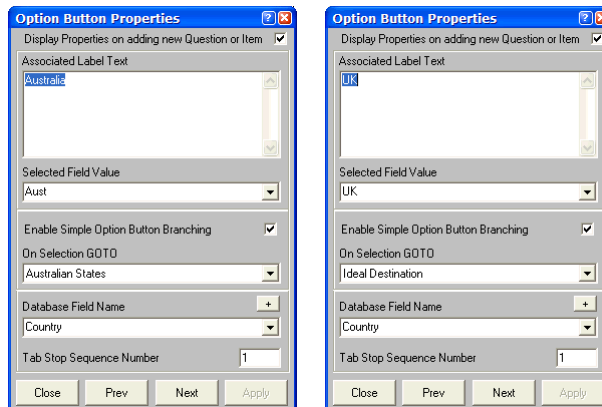
It's not until you have completed all your question forms that you can finalise the question response paths.

On the first question form you specified that respondents who selected **Australia** as their destination would be shown the second question form about the states, but you couldn't specify the question form that would be shown to respondents who chose another destination.

Now that all question forms are set up you can do so.

- 1 On the toolbar, click  to loop back to the first question form (titled **Holidays**).
- 2 Click on the **Australia** option button - the On Selection GOTO field should be **Australian States**. If it isn't, click  and select **Australian States** from the list.
- 3 Click **Next** to go to the **UK** option button.
- 4 In the On Selection GOTO field, click  and select **Ideal Destination** from the list.
- 5 Click **Next** to go to the **US** option button.
- 6 In the On Selection GOTO field, click  and select **Ideal Destination** from the list.
- 7 Click **Next** to go to the **Other** option button.
- 8 In the On Selection GOTO field, click  and select **Ideal Destination** from the list.
- 9 Click  to save the changes.


Now you are ready to test your PQF form!



## Test the questionnaire

Testing is a crucial step in producing questionnaires and surveys. Before moving on to the layout, you need to make sure that the questions can all be answered and all take you to where you expect them to go.

You may need to run through the test process numerous times when you are first learning to set up PQF forms, and will often have to make adjustments to the question forms and properties boxes to get it right.

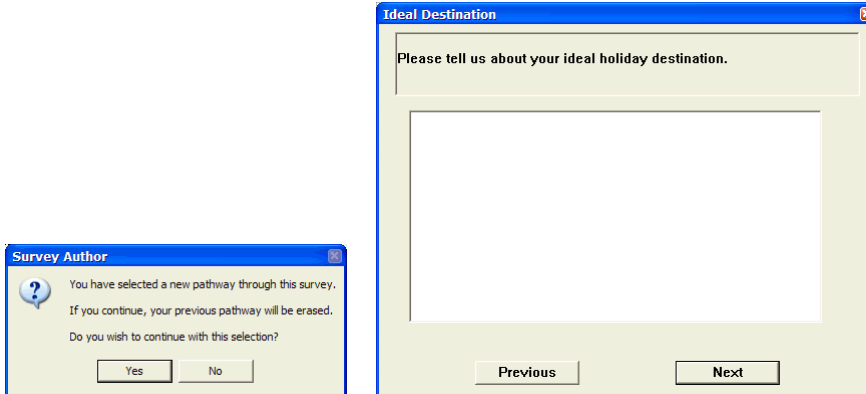
- 1 On the toolbar, click . The PQF form opens at the first question form as respondents will see it. Now you can see the results of your handiwork!



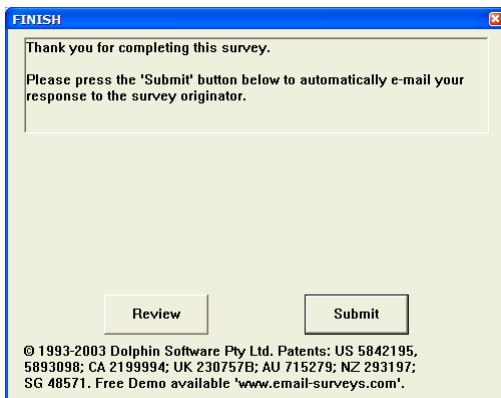
- 2 On the first question form, select **Australia**, then click **Next**. The Australian States form should display next. If it doesn't, you haven't got the GOTO path right. You'll need to fix this.



- 3 Click **Previous**.
- 4 Click **UK**, then click **Next**. A message is displayed that asks if you really want to select a new pathway - you do, so click **Yes**. The Ideal Destination form should display next. If it doesn't, you haven't got the GOTO path right. You'll need to fix this.



- 5 Click **Previous**.
- 6 Click **US**, then click **Next**. The Ideal Destination form should display next. If it doesn't, you haven't got the GOTO path right. You'll need to fix this.
- 7 Click **Previous**.
- 8 Click **Other**, then click **Next**. The Ideal Destination form should display next. If it doesn't, you haven't got the GOTO path right. You'll need to fix this.
- 9 Click **Previous**.
- 10 Click **Australia** again, then click **Next**. A message is displayed that asks if you really want to select a new pathway - you do, so click **Yes**. The Australian States form should display next.
- 11 Select one or more check boxes for the states and territories, then click **Next**. The Ideal Destination form should display next. If it doesn't, you haven't got the GOTO path right. You'll need to fix this.
- 12 On the Ideal Destination form, click **Next**. The Finish form should display. If it doesn't, you haven't got the GOTO path right. You'll need to fix this.



- 13 Close the PQF window. Your responses are listed.

```

[001] Holidays
Where would you like to go for your next holiday?
Options :Value = Aust          DB Field = Country
Text    :Value =                DB Field = Place
Opt-001 :Goto = Australian States

[002] Australian States
Where would you like to go in Australia? You can select more than one state or territory.
Chk Box :Value = FALSE        DB Field = ACT
Chk Box :Value = FALSE        DB Field = NSW
Chk Box :Value = TRUE         DB Field = NT
Chk Box :Value = TRUE         DB Field = QLD
Chk Box :Value = FALSE        DB Field = SA
Chk Box :Value = FALSE        DB Field = TAS
Chk Box :Value = FALSE        DB Field = VIC
Chk Box :Value = FALSE        DB Field = WA
NextBtn :Goto = Ideal Destination

[003] Ideal Destination
Please tell us about your ideal holiday destination.
Text    :Value = somewhere hot, with g DB Fields= Ideal
NextBtn :Goto = [FINISH]

[000] [FINISH]
FINISH :Goto = The End
    
```

14 To see the full list of questions and possible options, click .

```


[001] Holidays
Where would you like to go for your next holiday?
Options : NotSeen = VOID DB Field = Country
Opt-001 : Chosen = Aust Goto = Australian States
Opt-002 : Chosen = UK Goto = Ideal Destination
Opt-003 : Chosen = US Goto = Ideal Destination
Opt-004 : Chosen = Other Goto = Ideal Destination
Text : NotSeen = VOID DB Field = Place
Txt-001 : Label = If Other, please name:
NextBtn : Goto = Australian States

[002] Australian States
Where would you like to go in Australia? You can select more than one state or territory.
Chk Box : NotSeen = VOID DB Field = ACT
Chk-001 : Checked = TRUE UnChked = FALSE
Chk Box : NotSeen = VOID DB Field = NSW
Chk-002 : Checked = TRUE UnChked = FALSE
Chk Box : NotSeen = VOID DB Field = NT
Chk-003 : Checked = TRUE UnChked = FALSE
Chk Box : NotSeen = VOID DB Field = QLD
Chk-004 : Checked = TRUE UnChked = FALSE
Chk Box : NotSeen = VOID DB Field = SA
Chk-005 : Checked = TRUE UnChked = FALSE
Chk Box : NotSeen = VOID DB Field = TAS
Chk-006 : Checked = TRUE UnChked = FALSE
Chk Box : NotSeen = VOID DB Field = VIC
Chk-007 : Checked = TRUE UnChked = FALSE
Chk Box : NotSeen = VOID DB Field = WA
Chk-008 : Checked = TRUE UnChked = FALSE

[003] Ideal Destination
Please tell us about your ideal holiday destination.
Text : NotSeen = VOID DB Field = Ideal
Txt-001 : Label = {EMPTY}

[000] (FINISH)
Thank you for completing this survey. Please press the 'Submit' button below to automatically e-mail your response to the survey originator.

```

15 To return to the question form, click . To redisplay the Properties box, double-click anywhere on the question form.

Another way of testing that your paths don't loop on themselves is to do a scan of the questionnaire. On the menu, select **Tools > Scan All**. You should get a message that no errors were found; if there are errors, you will need to correct them then refresh the scan.

## Lesson Notes

Add your own notes for this lesson:

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## Spice it up!

There are a lot of design and layout enhancements you can make to your question forms. This tutorial will only cover some of the basics of adding a logo to the first question form, changing the background colour, and changing the colour of the text.

If you are not already at the first question form, go there using one of these methods:

- Click  or  until you get back to the **Holidays** form.
- Press **F5**, select **Holidays**, then click **OK**.
- Press the **Page Up** or **Page Down** keys.
- Select **Questions > Go to Question** from the menu, select **Holidays**, then click **OK**.

## Add a logo

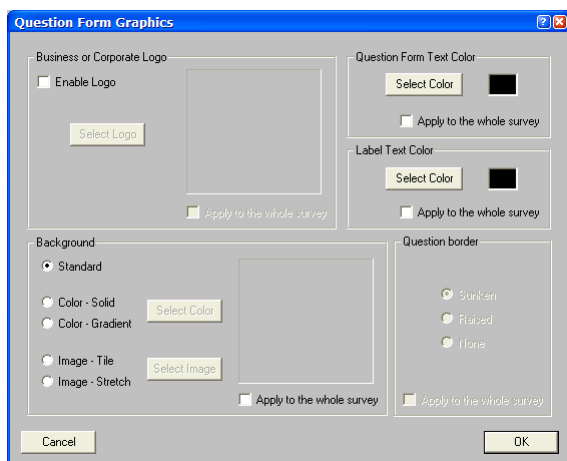


Check the online help for more information about restrictions on logos and how to add them to all question forms.

Once you start working with graphics such as logos, you will realise that you will need to design your question forms to suit them much earlier than we are doing in this tutorial, otherwise you will have to move questions, options, command buttons etc. around for every question form. By doing the design planning early, all later question forms should automatically cater for the graphics.

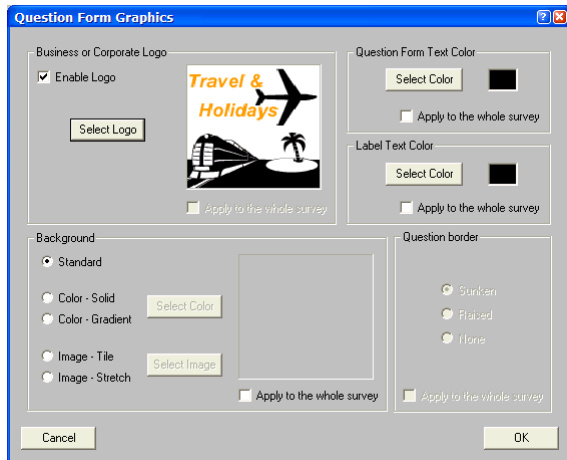
For this tutorial, you're only going to add a logo to the first question.

- 1 From the menu, select **Questions > Graphics**. The Question Form Graphics window is displayed.




- 2 Select the **Enable Logo** check box.
- 3 Click **Select Logo**. The Logos directory is displayed.

- 4 Select **travel.bmp**, then click **Open**. The Question Form Graphics window is redisplayed with the logo shown.



- 5 Click **OK**. The Holidays question form is redisplayed, with a square block for the logo below the **If Other, please name** text box.

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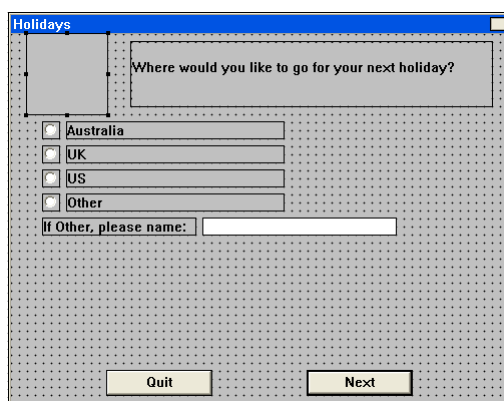
**Note:** An image is NEVER displayed in the question form, only the 'box' that contains it. You can see the logo if you click  to test the current question.


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- 6 You don't want the logo to be placed where it was put by default, so you need to decide where you want it.

For this tutorial, you'll place it in the top left of the question form, next to the question box. This means that the question box has to be resized to allow the logo to fit; otherwise the logo will cover part of the question.

- 7 Click inside the question box - the resize 'handles' are displayed.
- 8 Move the mouse over the far left centre 'handle' of the question box until it turns into a double-headed arrow, then click and drag the left edge towards the right, leaving enough space for the logo. Release the mouse.
- 9 Click inside the logo box. The cursor changes to a four-headed arrow.
- 10 Click and drag the logo box to the top left of the question form, dropping it just below the title bar.



11 Click  to see how the logo will look in the final questionnaire.



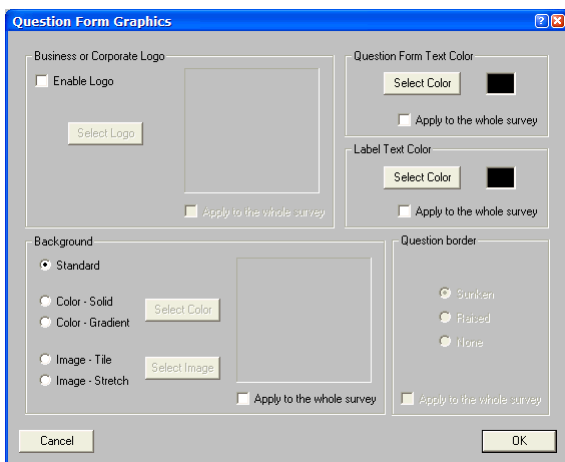
12 Close the test window to return to the Holidays question form.

## Change the background colour

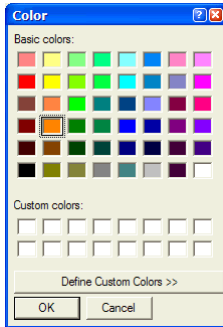
You can change the entire 'look and feel' of a questionnaire just by changing the colours used. As with any colour decision, you need to be aware of your audience and the nature of the questions being asked.

As this is a questionnaire about holidays, you can use bright, happy, fun colours!

1 From the menu, select **Questions > Graphics**. The Question Form Graphics window is displayed.



- 2 Go to the Background section (below the Logo section), select the **Color - Solid** option, then click **Select Color**. The Color palette is displayed.




- 3 Select a bright colour! Then click **OK**. The Question Form Graphics window is redisplayed with the colour shown in the box.

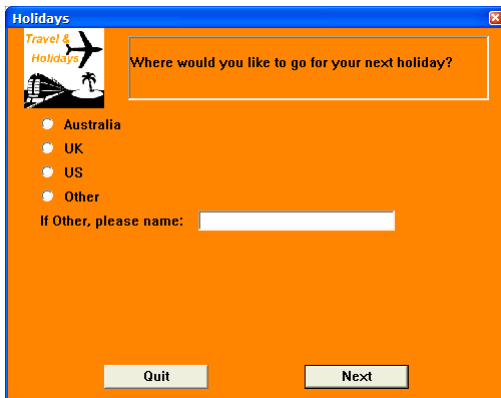
In this example, a bright orange was selected as it is a colour that is used in the logo.

- 4 Click **OK**.

---

**Note:** The colour is NEVER displayed in the question form. You can see the colour if you click  to test the current question.

---



Instead of using a standard colour for the background, you can create your own background graphic (BMP format) then select the **Image - Stretch** option to force it to fill the entire question form.

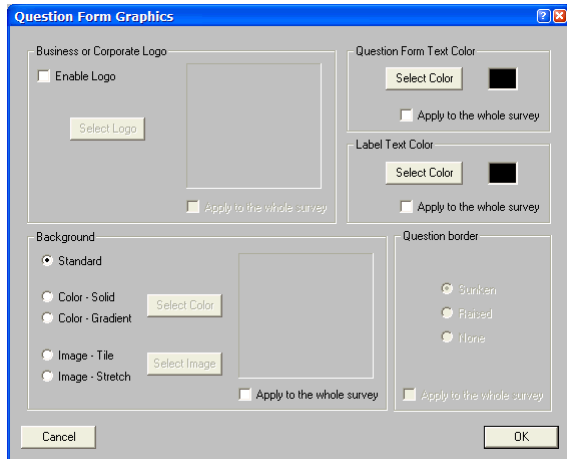
For details on how to do this, and any limitations on the image format, refer to the online help.

---

## Change the text colour

In addition to changing the colour of the background, you can also change the colour of the text.


- 1 From the menu, select **Questions > Graphics**. The Question Form Graphics window is displayed.

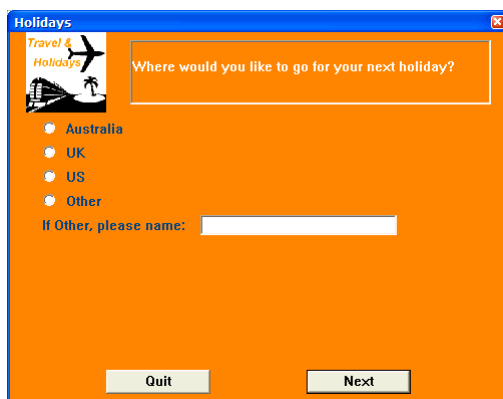



- 2 Go to the Question Form Text Color section (to the right of the Logo section), and click **Select Color**. The Color palette is displayed.
- 3 Select a colour for the question text, then click **OK**. The Question Form Graphics window is redisplayed with the colour shown in the box.

Make sure that the colour doesn't clash with the background!

- 4 Go to the Label Text Color section (to the right of the Logo section), and click **Select Color**. Select a colour for the label text, then click **OK**. Again, make sure that the colour doesn't clash with the other colours used.
- 5 Click **OK**.

**Note:** The text colours are displayed in the question form. You can see the colour against the background if you click  to test the current question.



- 6 Click  to save your design and layout changes.

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