
PQF Software Tutorial

Getting Started

Part 2: Produce, Send, and Collate

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Produce the PQF form

Now that your questionnaire has been created, you need to get it ready to be emailed - this is known as producing your form.

You can produce to a number of outputs; for this tutorial you'll be producing a PQF electronic form (Portable Questionnaire Format) that can be emailed to respondents.

Part of the production process is defining where you will be collating and storing the data that comes in from the respondents.

For this tutorial, you will be storing the collated data in an Excel spreadsheet:

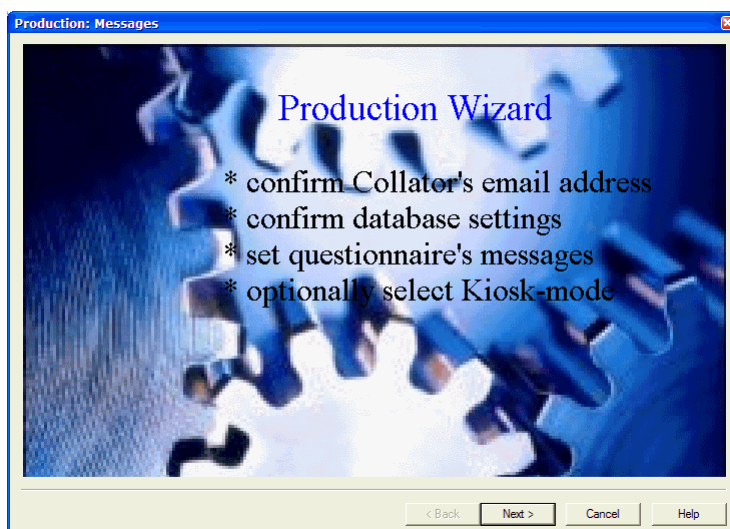
- 1 Create a new empty spreadsheet now.
- 2 Call it **Holidays**.

So, let's get started on this process... it's not as glamorous as the creation and design phase, but you won't have a questionnaire that you can send to anybody if you don't do it.

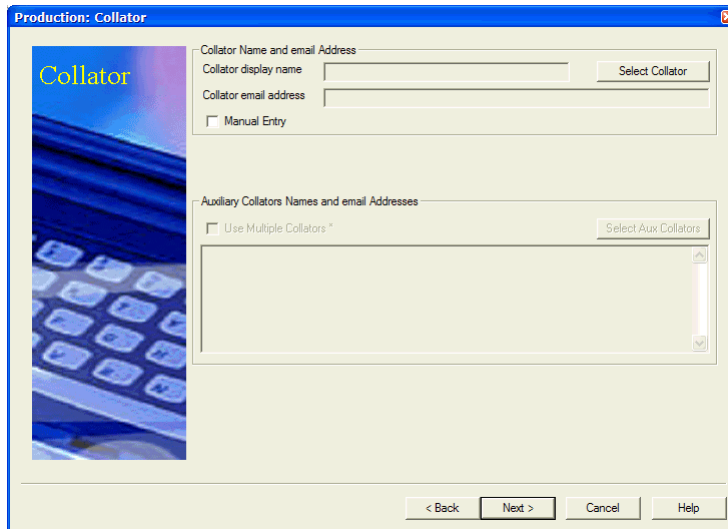
Production settings

- 1 On the toolbar, click . The Production Wizard window is displayed.

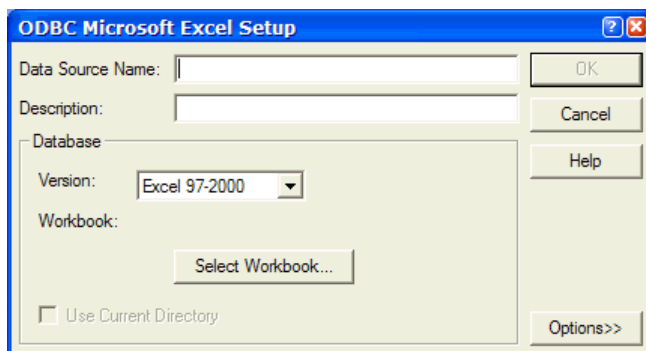
You may get a message if you are using a demonstration version of PQF Author - click **Yes** to continue with the survey production process.



- 2 Click **Next**. The Collator window is displayed.

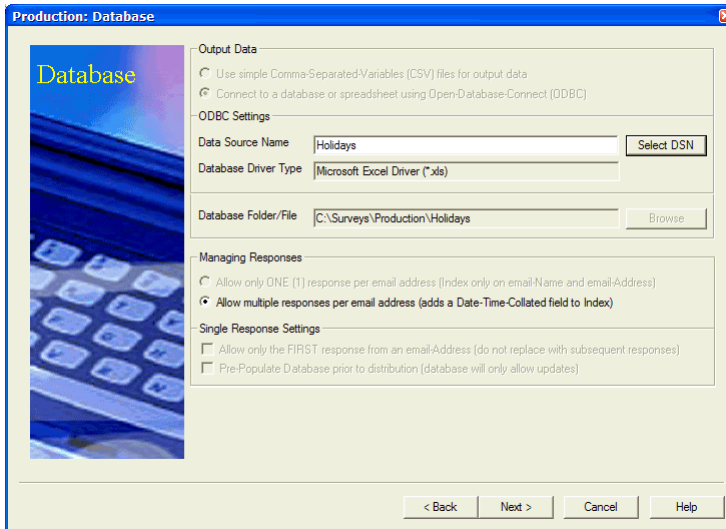


- 3 Click **Select Collator**. The email address book is displayed. (If you use Microsoft Outlook and it is not currently open, you will get a message about selecting a Profile. Select **Outlook**.)
- 4 Select the collator email address from the list. For the purposes of this tutorial, select your own email address, click **Collator** (your email address should be listed in the right box), then click **OK**.
If your email address is not listed in the address book, click **Cancel** to return to the Collator window, select the **Manual Entry** check box, then type your own email address in the **Collator Email Address** field. So that you can distinguish Collator email messages from your personal emails, type **Collator** in the Collator Display Name field.
- 5 Click **Next**. The Database window is displayed.
- 6 Click **Select DSN**. The Select ODBC Data Source Name window is displayed. (DSN: Data Source Name; ODBC: Open Database Connectivity)
- 7 As there is no database set up for this PQF form, click **New**. The New Data Source - ODBC Driver window is displayed.
- 8 For this tutorial, you will be storing the collated data in an Excel spreadsheet, so select **Microsoft Excel Driver**, then click **OK**. The ODBC Microsoft Excel Setup window is displayed.



- 9 In the **Data Source Name** field, type the name of the data source. For this tutorial, type **Holidays**.
- 10 Click **Select Workbook**. Navigate to the new, blank spreadsheet created earlier, then click **OK**.
- 11 Click **Options**, then clear the **Read Only** check box.
- 12 Click **OK**. The Select ODBC Data Source Name window is redisplayed.

13 Select **Holidays**, then click **OK**. The data source information is displayed in the Database window.

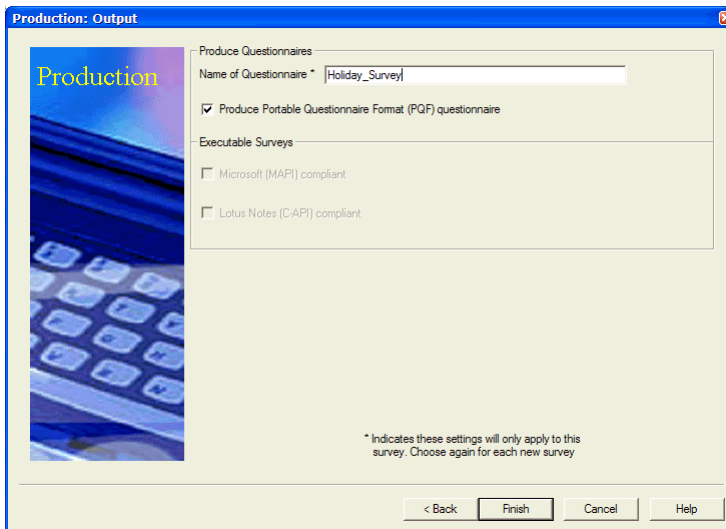


14 Click **Next**. The Messages window is displayed. Leave this screen as it is.

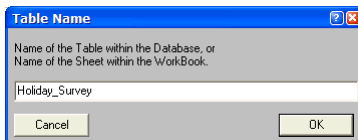
15 Click **Next**. The Output window is displayed.

16 Give the questionnaire a name. Type **Holiday Survey**.

An underscore automatically replaces the space you typed.



17 Click **Finish**. The Table Name window is displayed. It automatically defaults to the name of the form.



18 This is the name of the worksheet that will be created in Excel spreadsheet. Click **OK**.

19 If everything has been entered correctly, you will get a message that the production has been successful. This may be followed by a message asking you to email the PQF form now - click **No**; you'll be doing this soon.

You're nearly finished...

Email the PQF form

Part of the testing process is to make sure that the PQF form gets emailed out correctly. You could email out to 1000 people, but if you've got something wrong, 1000 people will see the error - and will be less likely to respond to a questionnaire from you later.

So your first test email should be to yourself. If you see any mistakes, you can correct them before making the PQF form public.



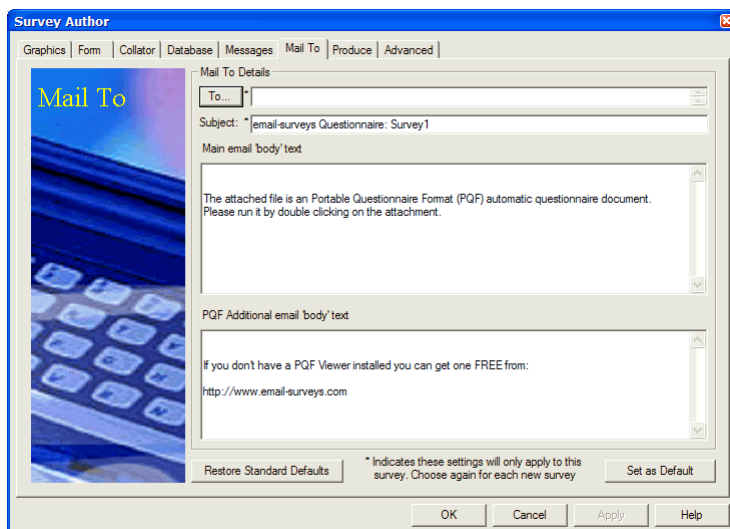
If your email access is limited you may want to skip the "Send yourself the PQF form" section, and go straight to the "Answer your own questions!" section. The ideal situation will be to actually email your PQF form to yourself, but if time is tight, you may not be able to do this just yet.


Send yourself the PQF form



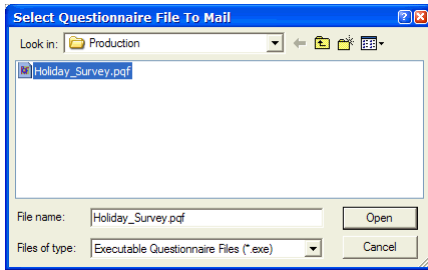
If you are using Lotus Notes, you cannot send yourself your PQF form using these instructions. See the Hint at the bottom of this section for information on how to force the email to be sent. Also, check the online help for specific Lotus Notes information.

- 1 From the menu, select **Tools > Settings**, then click on the **Mail To** tab.

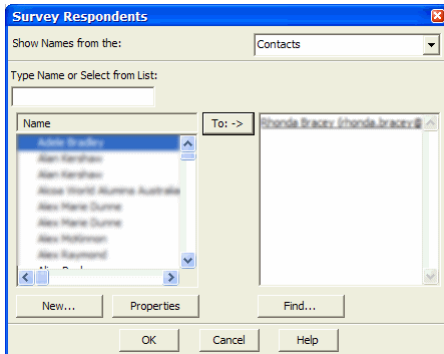


- 2 Click **To**, and select your name from the address book that opens.
If your name isn't listed, type it into the **To** field.
- 3 Change the **Subject** field to something more meaningful. **Holiday Survey** sounds about right!
- 4 You can add information about the PQF to the Main Email Body Text section; for this tutorial, leave it as it is.
- 5 Click **Apply**, then click **Close**.
- 6 Click  to save your settings.

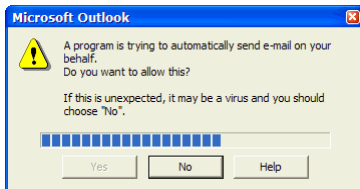
- 7 Click  to mail out the PQF form. The Select Questionnaire File to Mail window is displayed.



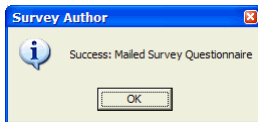
- 8 Click on the **Holiday_Survey.PQF** file, then click **Open**. If you are using Microsoft Outlook, your Outlook address book is displayed, with your name in the **To:** box.



- 9 You don't want to mail this PQF form to anyone else at the moment, so just click **OK**.
- 10 A message about this is your last chance is displayed. You should be pretty confident by now, so take a chance and click **OK**.
- 11 If you are using a recent version of Microsoft Outlook, you may get a message about viruses. Once the progress bar has completed, click **Yes**.



- 12 A success message is displayed! Click **OK**.
- Note:** This success message may not display - click the Author icon on the taskbar to see it.



- 13 You're done with Author for now so you can close it. If you find there are things you want to change about your PQF form as you go through it and answer the questions, then re-open Author, and re-open your **Holidays.svm** file.



If your PQF form does not get sent as expected using the instructions above, then open your email software, create a message to yourself, attach the **Holiday_Survey.PQF** to it, then click **Send**.

Answer your own questions!

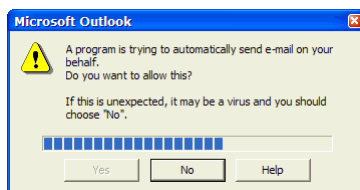


- All the following steps assume that you are connected to the internet - if you aren't, the email to yourself won't be sent or received.
- The PQF Viewer must be installed on your computer for the PQF file to open. If it not already installed, install it now.
- If you skipped the previous section ("Send yourself the PQF form"), you can open the survey from your computer. Go to **C:\Surveys\Production**, double-click on the **Holiday_Survey.PQF** file. Answer all the questions from step 4 below.

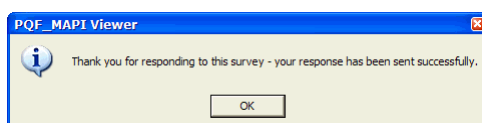
Assuming you got your own email address right in the Mail To window, you should have an email waiting for you in your in box about now.

- 1 Open your email program, if it is not already open.
- 2 If your email to yourself hasn't arrived yet (or hasn't been sent), click on your email program's **Send/Receive** button (or equivalent). You may need to wait a few minutes. If the email is still not delivered, click **Send/Receive** again to force the delivery.
- 3 When your **Holiday Survey** email is delivered, double-click on the PQF attachment to open it.
- 4 The first question form is displayed - take a good look at your handiwork as though you are seeing it for the first time, and make note of things that don't look quite right:
 - Are there any spelling or grammar errors, or typos?
 - Do the colours look OK, or do they hurt your eyes?
 - Are the questions clearly expressed, with no ambiguity?
 - Are all options presented?
 - Are the labels, option buttons, text boxes, and check boxes all aligned?
 - Is the logo where you want it? Is it obscuring any other question form elements?
- 5 Answer the first question: select **Australia** as your response, then click **Next**.
- 6 Complete the State question, then click **Next**.
- 7 Write something in the Ideal destination text box, then click **Next**.
- 8 Click **Submit**.

If you are using a recent version of Microsoft Outlook that virus message may come up again. Wait for the progress bar to complete, then click **Yes**.



- 9 When the response has been sent, a thank you message is displayed. Click **OK**. (If you don't see this message, click the PQF icon in the taskbar to display it.)



- 10 You're not finished yet... One of the things you will be testing is that all types of responses take the respondent to the question form that you specified. And when you check your responses in Collator, you'll want enough data in there to make some sense of it.
- 11 So, go back to your email program and double-click on the PQF attachment again.
- 12 This time answer the first question with **UK**, then continue responding to the PQF form and submitting it as a respondent would.
- 13 Repeat steps 11 and 12 twice, selecting the **US** and then the **Other** option. When you get to **Other**, don't forget to type a response in the **If Other** text box.
- 14 To force your responses to be sent from your Outbox, click **Send/Receive**.
- 15 Now you're done!

The next step is to open Collator and let it collate your responses.

Collate your responses

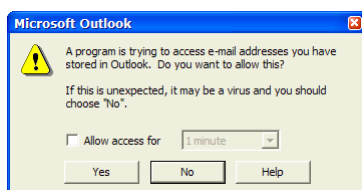
Collator is the program that automatically reads all email responses sent to it, and puts all the raw data into the appropriate spreadsheet or database tables and fields.

For this tutorial, we're assuming that Collator is installed on the same computer as Author.

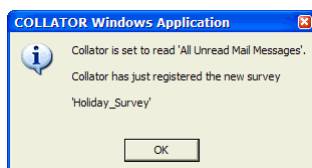
1 Open Collator.

If Collator has not be used before, you will be asked to specify a Mail Transport system - select **Microsoft Outlook**, then click **OK**.

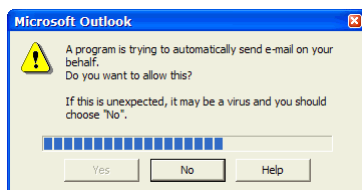
2 Collator's main job is to go looking in the email program's In Box for any messages addressed to it. To do that, it needs permission to access your In Box. If you are using a recent version of Outlook, you will get a message about this. Select the **Allow Access** check box, select a time, then click **Yes**. You may be asked this message a few times, depending on how many minutes of access you allow it. Keep clicking **Yes**.



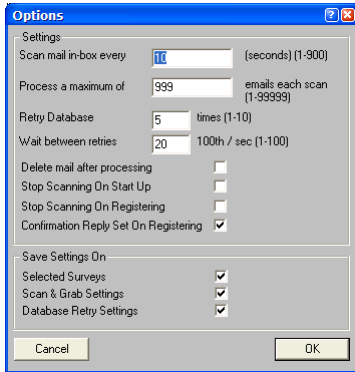
3 Once Collator has found its own emails, it tries to process them. Because it has never dealt with this PQF form before, it gives you a message that this new Holidays PQF form has been found and registered.



4 As Collator processes your responses, it wants to send you a reply email confirming that it received your response and has dealt with it. Again, you may get the Microsoft Outlook message about viruses again. Click **Yes**.

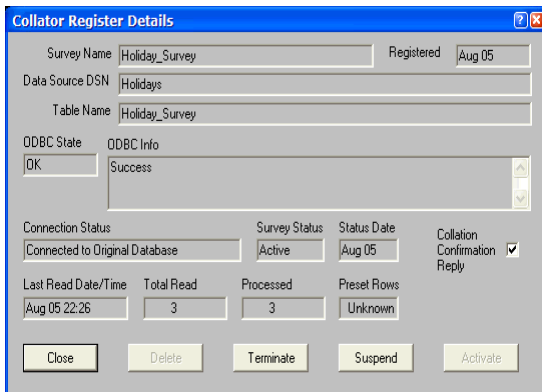


You can turn off this automatic confirmation message in Collator. From the menu, select **Survey > Options**, then clear the **Confirmation Reply** check box, then click **OK**.



- As Collator processes your responses, it updates the data summary, letting you know how many responses were read and processed, and on what date and time. You can view this summary in the Collator window, or double-click on the PQF row to view this summary data on the Collator Register Details window.

	Survey Name	Table Name	Status	Status Date	Total Read	Processed	Last Read	ODBC Status	Registered	Confirmation	DB Inf
1	Holiday_Survey	Holiday_Survey	Active	Aug 05	3	3	Aug 05 22:26	OK	Aug 05	Yes	Or



- When you know that all the responses you sent have been processed, close Collator.



In the 'real world' you would leave Collator running as a background process so that it collates responses as they arrive. Alternatively, you can turn Collator on whenever you want to force it to check for responses and process them.

View your data

Collator displays a summary of the responses read and processed but doesn't show you any of the actual data collected. That's because the data is stored in the Excel spreadsheet you set up earlier.

Now you're going to look at that data.

- Open the **Holidays.xls** spreadsheet you set up earlier.
- Click on the **Holiday_Survey** worksheet.

3 Here's your raw data that Collator automatically processed for you!

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	MailUserN	MailUserA	MailDateS	MailDateR	DateCollat	Ideal	Country	Place	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
2	Rhonda Br	SMTP:rho	2003/08/05	2003/08/05	2003/08/05	beach	Aust		TRUE	FALSE	TRUE	FALSE	FALSE	FALSE	FALSE	FA
3	Rhonda Br	SMTP:rho	2003/08/05	2003/08/05	2003/08/05	22:26:00	UK		VOID	VOID	VOID	VOID	VOID	VOID	VOID	VC
4	Rhonda Br	SMTP:rho	2003/08/05	2003/08/05	2003/08/05	beach_sar	Other	Vanuatu	VOID	VOID	VOID	VOID	VOID	VOID	VOID	VC
5																

- 4 Before congratulating yourself just yet, check that the column headings for the responses (listed in row 1) are meaningful. You may need to change them in Author if it is not clear what each piece of raw data belongs to.
- 5 If you're happy with these names, pat yourself on the back for a job well done! Congratulations! You can now mail the PQF form out to all the people you want to respond to it. (But before you do that, you should clear the data out of this spreadsheet so that your test results don't 'contaminate' the real responses.)

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