

PollCat Surveys Pro Quick Start

Your Authoring Environment

Print out this guide and use it as a reference while working on your survey.

This guide is designed to provide you with the basic steps to use the PollCat Surveys Pro question manager tool to build a simple survey or form, publish it on the Internet, collect information and report on the results.

The folder structure of the **Question Manager** makes it easy to manage your questionnaires and responses.

The **Multi-Use Work Space** is used to create and modify your questionnaires. You can work from either the right or the left pane to create your questionnaires.



Screen Shot of the Authoring Environment

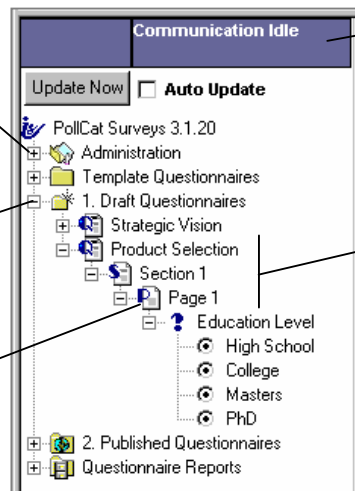
The Question Manager (left pane)

The question manager appears in the left pane and allows you to manage the entire process, from creation, to publishing, to reporting. Folders are used to organize your work.

Click on the plus "+" sign to expand its hierarchy.

Click on the minus "-" sign to collapse its hierarchy.

Click on any icon to load its page in the right pane.



This is the Question Manager's status area and indicates when it is in communication with PollCat's servers over the Internet.

All questionnaires have a section and page. Sections create breaks for large surveys. Pages hold the questions and responses. You can add an unlimited number of sections and pages.

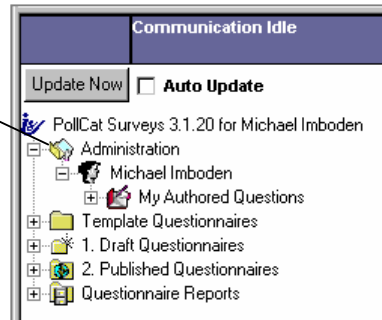
Sample Question Manager Screen Shot

Pre-Defined Folders

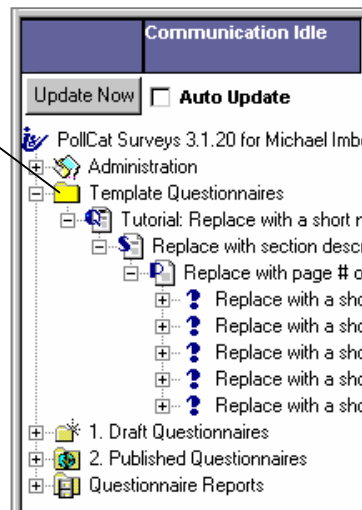
These folders are located at the Author Home Page and help you organize your questionnaires and define the process for conducting a survey.



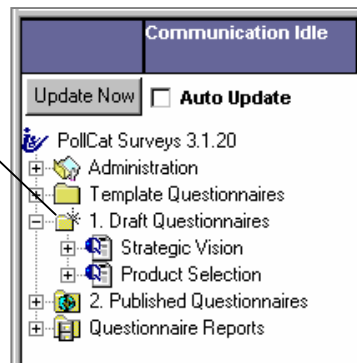
Administration. This folder holds administrative and system data and should be used by advanced users only. Note that if you have authored many questionnaires, there will be many questions in the 'My Authored Questions' folder.



Template Questionnaires. This folder holds template(s) used to assist users in developing both generic and specialized surveys and forms. Questionnaires should be copied into the **draft questionnaires (or Work in Progress)** folder before being used. Use templates as tutorials to create basic questionnaires. Preview the tutorial questionnaires to see how typical surveys will look.



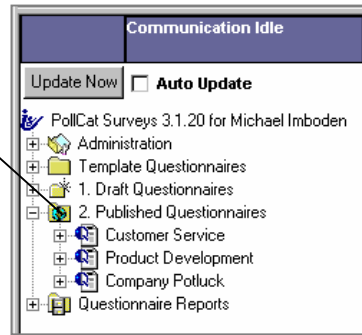
Draft Questionnaires/Work in Progress Folder. This folder holds surveys and forms that are currently being worked on by the author or can hold an author's personal templates and sample questionnaire. You will create your questionnaires here.





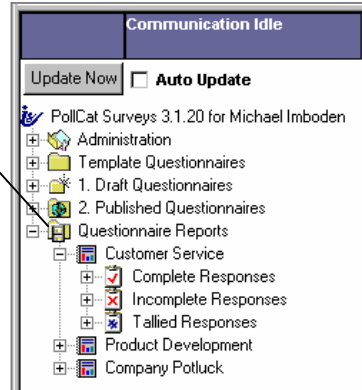
Published Questionnaires.

This folder holds surveys available to be taken over the Internet and are automatically placed there by PollCat when a survey or form is successfully published. You will view response data and export from here.



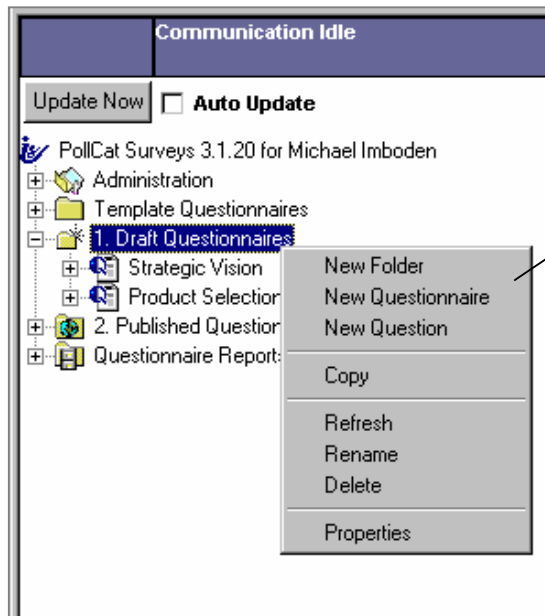
Questionnaire Reports.

This folder holds the results and dynamic reports of your published surveys.



Folder Actions

The Authoring Environment supports many folder actions. Simply click your alternate mouse button to bring up the folder action menu.

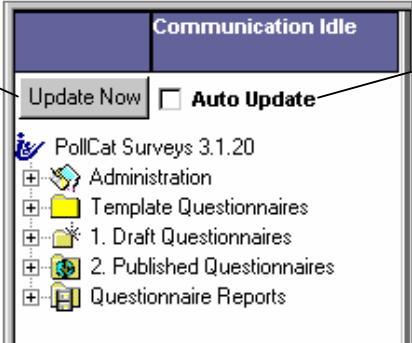


You have full control over your folders and questionnaires. New folders, questionnaires, and questions can be created with just a click of the alternate mouse button. Folders can also be copied, moved, renamed, and deleted.

Screen Shot of Folder Actions

Updating Your Work / Auto Update

Be sure to click the **Update** button to save any changes that you have made while authoring your questionnaire. (Note: Delete actions will occur instantly.)



Click this button to manually update any changes you may have made to your questionnaire.

Check this box to have your changes automatically updated as you make them. This option could slow performance – when selected, the system saves each change across the Internet as it occurs.

Update Now Auto Update


- PollCat Surveys 3.1.20
 - Administration
 - Template Questionnaires
 - 1. Draft Questionnaires
 - 2. Published Questionnaires
 - Questionnaire Reports

Multi-Use Work Space (right pane)

The right pane will change based on which item is selected in the question manager (left pane). We recommend using the basic template as a tutorial and to explain the usage of each field in the questionnaire.

Questionnaires may have with unlimited Sections and Pages, each with unique headers and footers. To print a survey page, preview it then use the browser's Print command.

Task buttons are available for most commonly used functions.



Use the **New Survey** button to create a survey from scratch.

HOT TIP: Use the **Tutorial** button to load the sample templates to learn about the system.

Use this drop-down list to select a published survey to report on.

Logout Author Home Support

Welcome Michael Imboden

Author Home above returns you to this page.
Get [Quick Tips](#) for important information.

Instructions Tutorial New Survey View Draft Surveys Select a Survey Report

- Administration
- Template Questionnaires
 - 1. Draft Questionnaires
 - 2. Published Questionnaires
- Questionnaire Reports

Sample Multi-Use Work Space Screen Shot

General System Behavior Guidelines

During communication with PollCat's servers, your browser may appear to be dead and your cursor may disappear. This is normal behavior when the Question Manager engine is communicating with PollCat's servers over the Internet. Use the status window at the top of the Question Manager (left pane) to see what activities are currently underway.

Because Internet traffic can be unpredictable, it is a good idea to re-try a task again if you have a problem or get an error the first time. Many times your request is processed without a hitch the second time around.

How to Build A Questionnaire

Creating The Questionnaire

1. Sketch out the major components of your survey or form in order to get an idea of where titles, instructions, copyrights, sections (if any) and page breaks should be.
2. Click on the **Tutorial** button in the right pane from the Author Home Page. (Be patient, it can take awhile to load.)
3. Click on the **Questionnaire** icon in the left pane (use the scroll bar if necessary) and fill out the fields using the instructions contained in the template.
4. Click on the **Section** icon and fill out the fields using the instructions contained in the template.
5. Click on the **Page** icon and fill out the fields using the instructions contained in the template.
6. Click on the **Question** icon and fill out the fields using the instructions contained in the template. The template contains five separate question type examples.



"right-click" on the question to bring up a menu of actions, including **delete**.

Note: You can also open up the Questionnaire Templates folder and copy the basic template into your Draft Folder using drag and drop.

Preview the template survey to see how the various fields form the final survey. **Print** it out from your browser as a hardcopy reference.

Communication Idle | Logout | Author Home | Support

Update Now Auto Update

PollCat Surveys 3.1.20

- Administration
- Template Questionnaires
 - 1. Draft Questionnaires
 - Strategic Vision
 - Product Selection
 - Organizational Performance
 - Employment Application
 - New Questionnaires
 - Tutorial: Replace with a short name
 - 2. Published Questionnaires
 - Questionnaire Reports

Sample template survey: Each field is explained and should be replaced with your text or left blank.

Question Types

A variety of question types are supported. Here are examples of the various types that you can use in your questionnaires.

Multiple Choice –
Single Answer
(Radio Buttons)

Select all that Apply
(Check Boxes)

Rating Choice or
Scale (1 to interval)

Multiple Fields
(Input Forms)

Open Ended

This is a preview of how the various question types will appear in your questionnaire. You can mix and match question types to suite your particular survey needs.

Preview Shot Showing Each Question Type

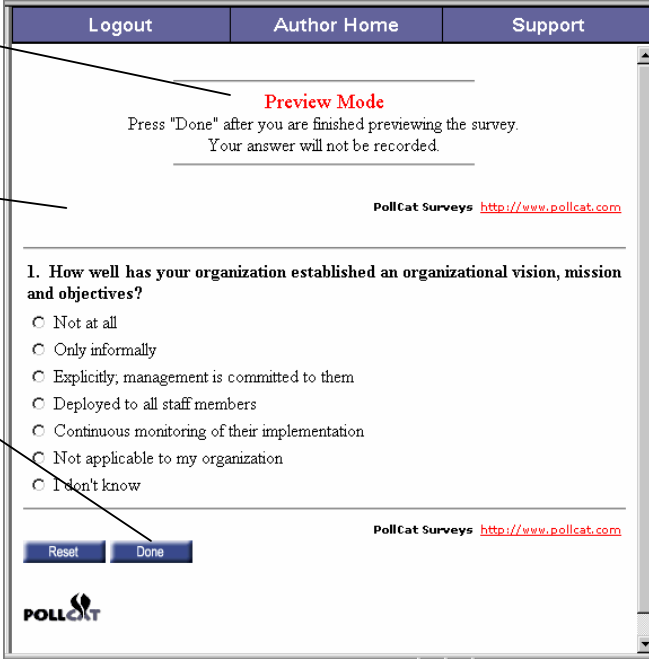
Previewing The Questionnaire For Errors And Format

1. Click the **Preview** button in the right pane to view the entire questionnaire at any time.
2. Check spelling and format then make any corrections.

Indicates that you are in **Preview Mode**.

This is exactly how your questionnaire will appear to your participants.

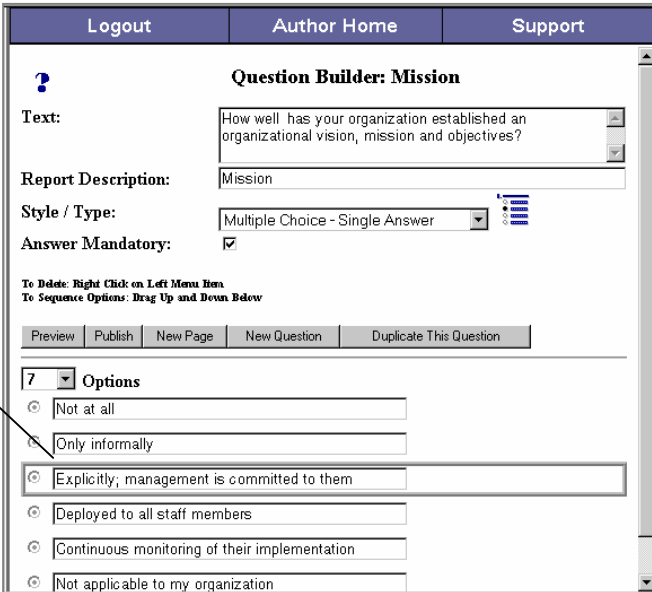
Click **Done** to return to the Authoring Environment.



Partial Preview of a Sample Questionnaire

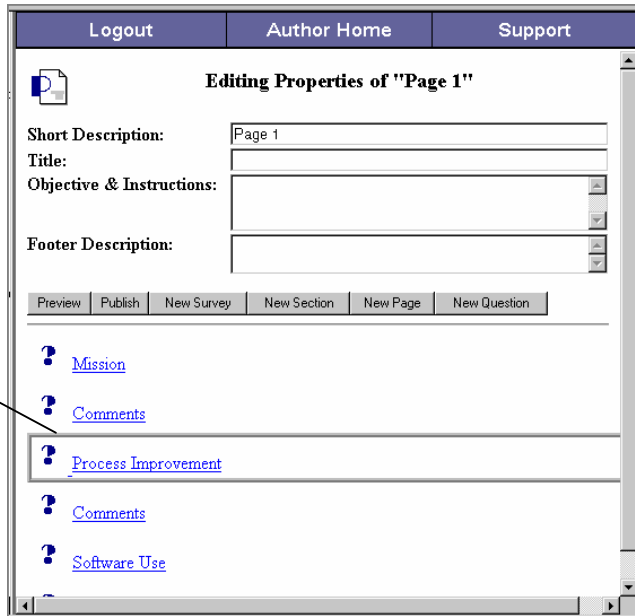
3. Question options can be re-arranged via drag and drop before a survey is published. Move your mouse cursor over the icon next to the option you want to move. When the cursor turns into a rectangular box, hold your mouse button down and drag the option to the new location.

The cursor changes to indicate that this question option can be moved to a different position.



- Individual questions can also be re-sequenced. Move your mouse cursor over question icon next to the question that you want to move. When the cursor turns into a rectangular box, hold the mouse button down and drag the option to the new location.

This question can be re-sequenced to a more appropriate place in your questionnaire.

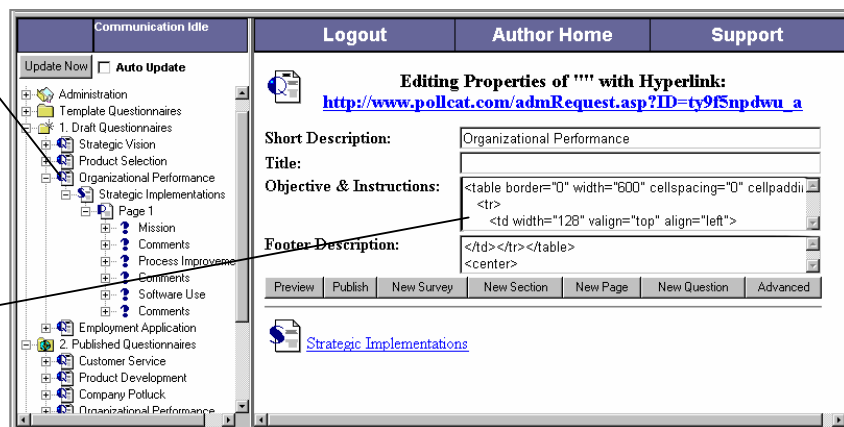


Embedding HTML In Your Questionnaire

- For a custom look and feel to your questionnaire, you can embed HTML tags in your questionnaire. HTML tags can be placed in textbox and input field areas. Feel free to experiment and discover for yourself the overall effect. The best way is to find a page with a layout that you like, then use the browser's View / Source command to see the underlying HTML which you can edit, copy and paste here.

Clicking your questionnaire in the left pane will bring up its properties in the right pane.

You can embed any standard HTML tag. This example uses the TABLE, TR, TD, and IMG tags for a creative effect. (see next page)



Sample Screen Shot Showing Placement of HTML Tags

Before...

PollCat Surveys <http://www.pollcat.com>

1. How well has your organization established an organizational vision, mission and objectives?
Answer Required

Not at all
 Only informally
 Explicitly, management is committed to them
 Deployed to all staff members
 Continuous monitoring of their implementation
 Not applicable to my organization
 I don't know

2. Please add your comments here:

Comments:

3. How well does your organization perform process improvement?

Not at all
 Based on experiences of individual staff members
 Case by case, in a planned and controlled way
 By applying an organizational procedure
 By using quantitative data to monitor it
 Not applicable to my organization
 I don't know

Sample Questionnaire

... After using simple HTML tags

PollCat Surveys <http://www.pollcat.com>

1. How well has your organization established an organizational vision, mission and objectives?

Not at all
 Only informally
 Explicitly, management is committed to them
 Deployed to all staff members
 Continuous monitoring of their implementation
 Not applicable to my organization
 I don't know

2. Please add your comments here:

Comments:

3. How well does your organization perform process improvement?

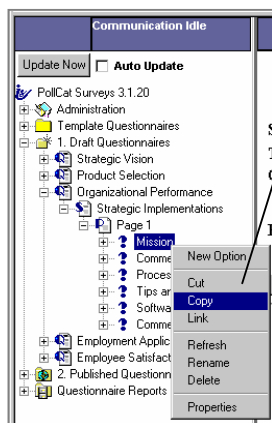
Not at all
 Based on experiences of individual staff members
 Case by case, in a planned and controlled way
 By applying an organizational procedure
 By using quantitative data to monitor it
 Not applicable to my organization
 I don't know

Same Questionnaire with HTML Tags

Copying Questions and Pages

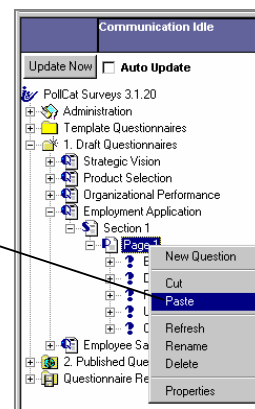
To save time building your questionnaires, you can make copies of your questions or questionnaire pages. These copies can be placed in either the same questionnaire or in a different questionnaire and modified as desired.

6. Move your cursor over the icon of the question or page you would like to copy. While over the icon, click the alternate mouse button to bring up the pop-up action menu. Choose **Copy** from the pop-up action menu.
7. Now, move your mouse cursor to the desired destination and click the alternate mouse again to bring up the pop-action menu. Click **Paste** from the menu. The questionnaire or page will now be copied to the new location. In addition to the Copy / Paste method, you can also use the **Drag** and **Drop** technique to copy questions and pages.



Questions and pages can be copied and placed in the same or another questionnaire.

Click **Paste** to place a copy of the question or page in the desired location.



Advanced Options

PollCat Surveys Pro supports many advanced options such as browser window titles and custom body tags. There's even a place to specify a URL where you would like to return your respondent after completing the questionnaire. To access the advanced options of your questionnaire, do the following:

- From the Question Manager (left pane), click on the icon of the questionnaire for which you want to access the advanced options. The questionnaire properties screen will be displayed in the right pane.
- Click the **Advanced** options button to bring up the advanced options screen.

Click the questionnaire icon in the left pane.

The questionnaire properties screen will be displayed in the right pane.

Click the **Advanced** options button to access the questionnaire's advance properties.

Screen Shot of Question Manager (left pane) and Questionnaire Properties (right pane).

- Use the input fields provided to enter your advanced elements. Please see the screen shot for a description of the various advanced properties.

This is the browser window title for your questionnaire.

Elements entered here will appear between the html **<head>** tag in your questionnaire.

Elements entered here will appear between the html **<body>** tag in your questionnaire.

Enter a URL where you would like to return your respondents after completing your questionnaire.

Click to return to the normal properties screen.

Screen Shot Showing Advanced Options

Conditional Branching

PollCat Surveys Pro supports conditional branching. This feature enables you to vary the path respondents take through your survey based on the answers they provide while taking the survey.

To enable branching on a questionnaire, click the questionnaire on the Question Manager, then in the Multi-Use Workspace choose the 'Advanced' button. Then, mark the 'Enable Branching' checkbox.

A tip: plan and create your questionnaire pages before recording branching information. You need to have the pages created in order to select them as branching destinations.

When branching is enabled, you will see two additional choices under the 'Style / Type' drop-down when you are on the **last question on a page**. These choices are 'Multiple Choice – Branch' and 'Dropdown – Branch'.

When you choose one of these, a dropdown box will appear next to each answer option. These

dropdowns list the pages that you can branch to.

You can branch to any page after the current page or to the end of the survey. (If you reorder your pages, ensure that all of your branching selections point forward - any that point backward will automatically change to point to the next page.) Branching on the last page of the survey will be

These dropdowns allow you to specify which page the survey should jump to based on the option selected by the respondent.

ignored.

You can also set a default 'Next Page' for a questionnaire page. To use this

Set the default page that will appear when the respondent clicks 'Next Page' while answering the survey

use the page in the Question Manager then use the 'Default Next Page' dropdown. You may need to use this feature if you have set up a branching question with multiple branches that each have a distinct set of questions.

For example, consider the following branching question structure: respondents choosing the first option on the branching question should see page 2 and then go to the end of the survey, and those choosing the second option should see page 3 and then go to the end. Normally, when page 2 is completed and the respondent clicks next, page 3 will appear. So, on Page 2 of the survey, you would set the 'Default Next Page' to 'End of Survey' so that the respondents who get to page 2 do not see page 3 when they click 'Next'.

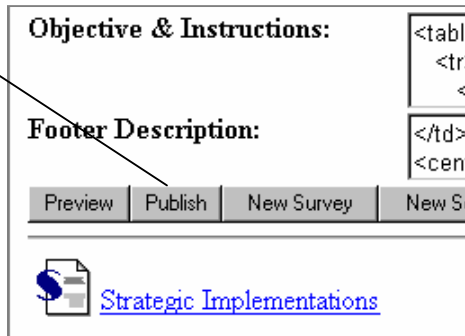
Note that:

- branching questions will be marked as mandatory.
- branching questions will override the 'Default Next Page' setting.
- if you create more than one branching question per page, the last one will override all of the others
- you can use the 'Preview' button to test out the branching mechanisms that you create.

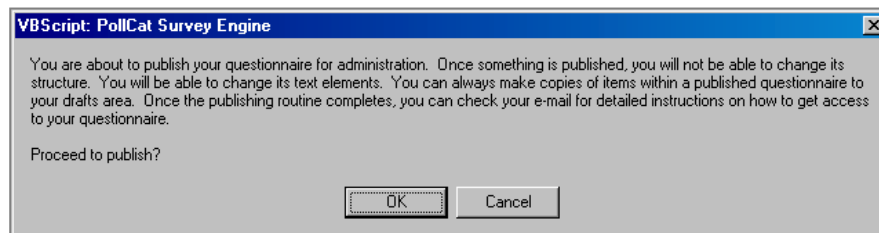
Publishing The Questionnaire

11. When you are satisfied with the way your questionnaire looks, click the **Publish** button in the right pane to begin the publishing process.

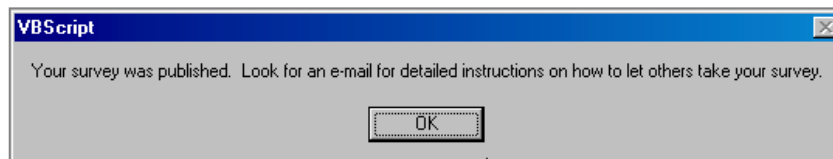
The publishing action "locks" the survey's structure down so you cannot add or delete any questions or options. You can still change the survey text just in case you find errors after the survey has been published.



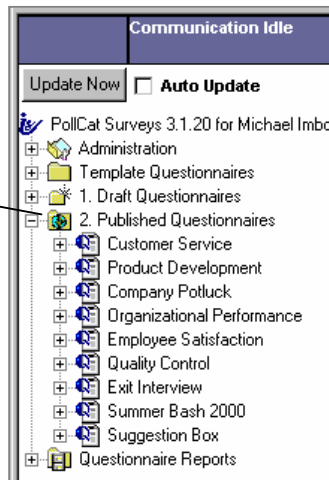
12. An information dialogue box will be displayed similar to the one shown below. Please review this screen for some very important information pertaining to the publishing of your questionnaire. Click **OK** to continue.



13. When the publishing process has completed, a confirmation dialogue box will be displayed. Click **OK** to return to your authoring environment.



All published questionnaires are moved from the **Draft Questionnaires** folder into the **Published Questionnaires** folder



The Published Questionnaires Folder

14. An email confirmation will also be generated and emailed to you. **This email will contain information on how you can make your questionnaire available to your survey participants.**

Web developers will use this address to link to your survey directly from an icon on your web site.

You can send an email containing the link to your questionnaire.

You can publish this survey ID on paper along with our web site address so respondents can login directly from our site.

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Congratulations Michael Imboden!

"Customer Service Rating" has been successfully published. There are three
ways survey participants can access your questionnaire:

1. You can embed this link on your web site using standard HTML:
http://www.pollcat.com/ty9fwctb45\_a

Any vistors to your site can click on an icon linked to the address above and
immediately take your survey. Here is an HTML example using this link:
<A HREF="http://www.pollcat.com/ty9fwctb45_a">Take My Survey</A>

2. You can e-mail the link above to your participants which they can use to
directly access your questionnaire. Most newer e-mail packages will allow the
recipient to click from the message straight to your questionnaire. If the e-
mail package does not support this functionality, recipients will be required
to type the link in the address line of their browsers.

3. You can supply them with the questionnaire ID: "ty9fwctb45_a" (without the
quotes) and point them to the PollCat Survey web site at
http://www.pollcat.com/survey

Important Notes For You:

To download your response data, log in then follow the download link at:
http://www.pollcat.com/login.asp

To access survey statistics and individual responses, log into PollCat at
http://www.pollcat.com/login.asp

To provide others with a graphical tally report, send them this link:
http://www.pollcat.com/Lite/report.asp?report=ty9fwctb45\_a

You can find answers to frequently asked questions at
http://www.pollcat.com/default.asp?Nav=22

Thank you for using our service. Please e-mail us at
mailto:administrator@interscore.com with any questions.

PollCat Survey Administrator

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Sample E-mail notification received after a successful survey-publishing event

Reporting On Results

1. Select your survey from the **Select a Survey Report** drop-down list on the Author Home page.

Select any of these published surveys to jump to the **Questionnaire Reports** screen.



Sample partial screen shot of the report drop-down list box available from the Author Home page.

2. Your report will appear in the right-hand pane.



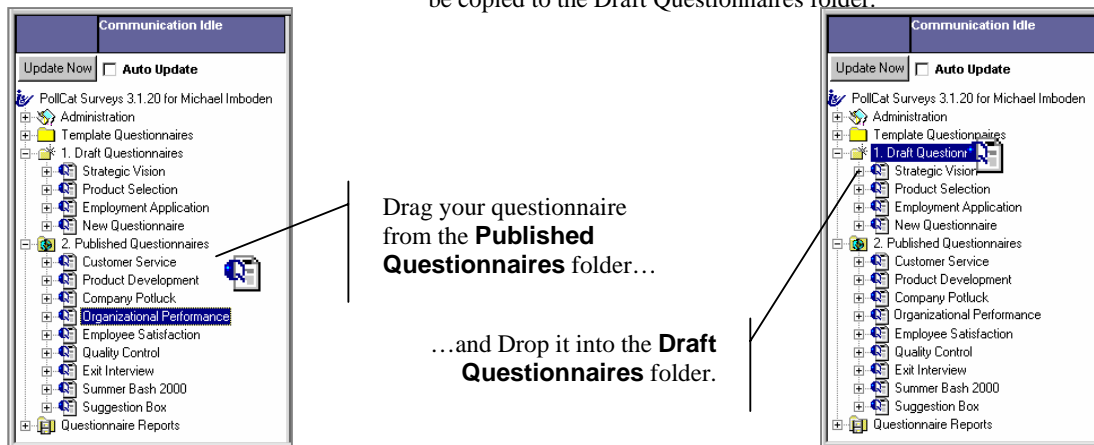
Partial Screen Shot of a Sample Report

Re-Purposing Published Questionnaires

Once you published your questionnaire, you cannot alter its structure. Although you can make textual modifications, you cannot add, delete, or alter the question types once a questionnaire has been published. If you want to re-purpose or make structural changes to your published questionnaire, you will need to create a copy of the questionnaire.

To create a copy, simply **drag** the questionnaire out of the **Published Questionnaires** folder and **drop** it into the **Draft Questionnaires** folder.

1. Mouse click on the icon of the questionnaire that you want to copy.
2. Holding down the mouse button, drag the icon to the Draft Questionnaires folder.
3. Release the mouse button. After a few minutes, your questionnaire will be copied to the Draft Questionnaires folder.



Downloading Data

The best way to get your data is to log in to the PollCat site, and from the PollCat Summary Screen, click the **Download Data and Remove Branding** link. After purchasing your data, a zip file containing Access 97 and XML renditions of your data will be generated and made available to you on your 'Published Surveys' page (under the 'Data Packages' link) in PollCat Surveys Lite.

Downloading Your Data

1. Go to the PollCat web site at <http://www.pollcat.com>
2. Log in using your email address and password
3. From the PollCat Summary Screen, click the **Download Data and Remove Branding** link. This will take you to our PollCat Enhancements page.

The **Download Data** area is where you can retrieve your data. Click on the adjacent link to download enhanced reports and data.



4. From the PollCatSurvey Enhancements page, find the specific survey for which you would like order enhanced reports and data.
5. Click the **Purchase Data** link to initiate the payment process.
6. After your payment has been approved, you will be notified via email with instructions on how to obtain your enhanced data package.

What's Inside Your Data Package

Your enhanced reports and data are packaged into a Zip file. You will need a software utility that can read and 'unzip' this type of file.

| Name | Modified | Size |
|---------------------------|------------------|---------|
| Retrieve_PollCat_Data.xls | 2/22/00 4:20 PM | 34,304 |
| 2000-01-24_14-16-55.mdb | 1/24/00 2:17 PM | 167,936 |
| 2000-01-24_14-16-55.txt | 1/24/00 2:17 PM | 76 |
| 2000-01-24_14-16-55.xml | 1/24/00 2:17 PM | 58,392 |
| analysis_tool.mdb | 2/23/00 11:44 AM | 196,608 |
| readme.txt | 2/3/00 5:46 PM | 8,245 |
| 2000-01-24_14-16-55.html | 1/24/00 2:17 PM | 15,567 |

Contents of Zipped Data Package

Excel 97 Analysis program

Your data in Access format

Text file listing of all files in this zip

Your data in XML format

Access 97 Analysis program

Complete description of all files in this data package

Tally report in HTML format

Error Handling

Try, try again.

The Internet browser environment is a somewhat unpredictable environment – the amount of Internet traffic and the quality of connections are not consistent. As such, errors may occur that are often **NOT** serious to the application. If you run into problems, you may wish to re-try what you were doing. You can also click the 'refresh' button in Internet Explorer to quickly reload PollCat Surveys Pro.

If re-trying is unsuccessful, please see the **Getting Help** section below for information on how and where you can receive additional support.

Getting Help

Do-It-Yourself

You can download our Troubleshooting Guide or Frequently Asked Questions to see if your problem is covered in those documents. Check out our current FAQ at <http://www.pollcat.com/default.asp?Nav=22>

Via Online Support

Use our online form at <http://www.pollcat.com/SupportRequest.asp> to submit questions or comments.