HelpMatics™

Service Management System

HelpMatics™ Survey

Manual

1 Overview of HelpMatics™ Survey

1.1 Introduction

HelpMatics™ Survey makes it possible to conduct customer surveys that can be flexibly defined and immediately evaluated either together with the Service Management System HelpMatics™ ServiceDesk or, in stand-alone operation, by integrating your own data sets. This tool helps companies gain and evaluate information on customer satisfaction, market opportunities etc. in a quick and simple manner.

The seamless integration into HelpMatics™ ServiceDesk or in HelpMatics™ Change allows you to conduct continuous surveys with participants selected at random and observe their progress.

1.2 Overview of functions

Survey templates are created and activated. The questionnaires are sent to the selected recipients by e-mail either continuously (ServiceDesk or Change survey) or as one-time survey. Apart from freely definable texts, the e-mail also contains a link to the selected – anonymous - questionnaire. Depending on the type of link, the questionnaire can be opened in the browser or in the Notes client. The Public Survey mode offers a further option: The link to the questionnaire can be published e.g. in the intranet.

- HelpMatics™ Survey can be used both for one-time and continuous surveys.
- Surveys can be distributed to a defined circle of users with the unique assignment of links ensuring that each person selected may take part in the survey once only, or can be freely published.
- Fast, problem-free creation of questionnaires by integrated or freely definable question templates
- Includes all relevant question types: Single and multiple choice questions, grading questions, open questions
- Answering of the questionnaires via Notes or Web client
- Convenient reporting functions: Indication of absolute and relative frequencies, average grades, graphical representation of the results by bar charts, integrated export function
- Systematic random selection in ServiceDesk and Change surveys: The integration into HelpMatics™ causes the creation of a questionnaire that is sent automatically at the closure of every nth ticket. Free random selection.
- Unlimited number of persons to be surveyed with up to 25 questions per survey
- The standard HelpMatics™ Survey is available in two languages. Further language versions can be supplied on request. In any case, surveys can be created in any language you wish as all texts are freely definable.

2 Main view and navigation

2.1 The Navigator

The Navigator permits navigation within the system. Depending on the selected level, further information and selection fields will be displayed. Navigation is made by mouse-click.

In addition to a possible selection on the Navigator, the desired information is displayed in the Viewer.

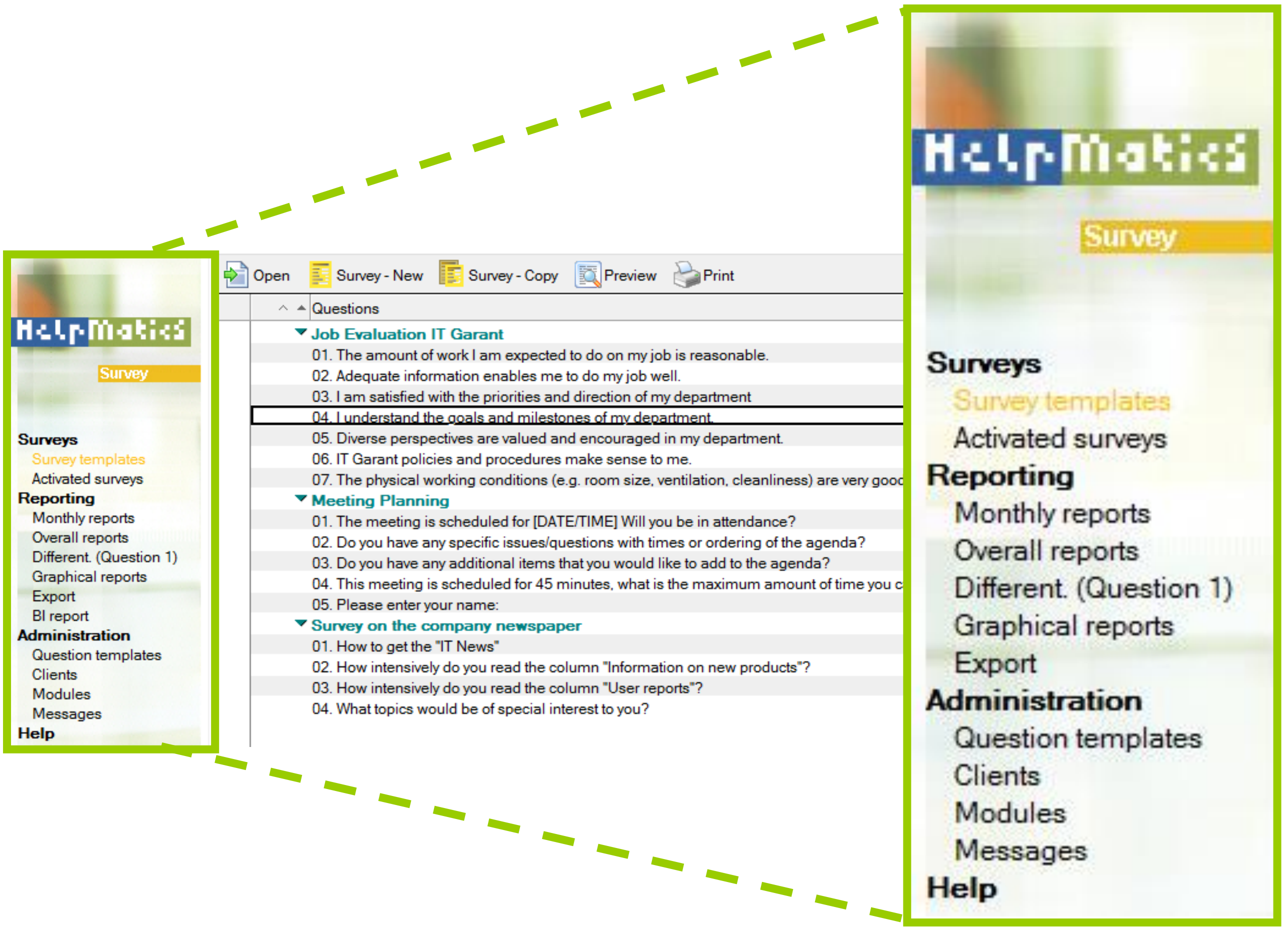

Fig. 1 Navigator

2.2 The Viewer

The Viewer represents the main window on the right, where the information selected in the Navigator is displayed.

By clicking the column titles you can change the sorting order.

By double-clicking a line you can edit information and change it depending on the type of information.

Information is displayed in categories. A green arrow symbol ▼ represents the categorized level. If the arrow points to the right ▶, further information is hidden; you can display it by clicking the arrow. Via the VIEW > EXPAND ALL and COLLAPSE ALL menu you can perform the procedure of displaying and hiding information, respectively, for all documents.

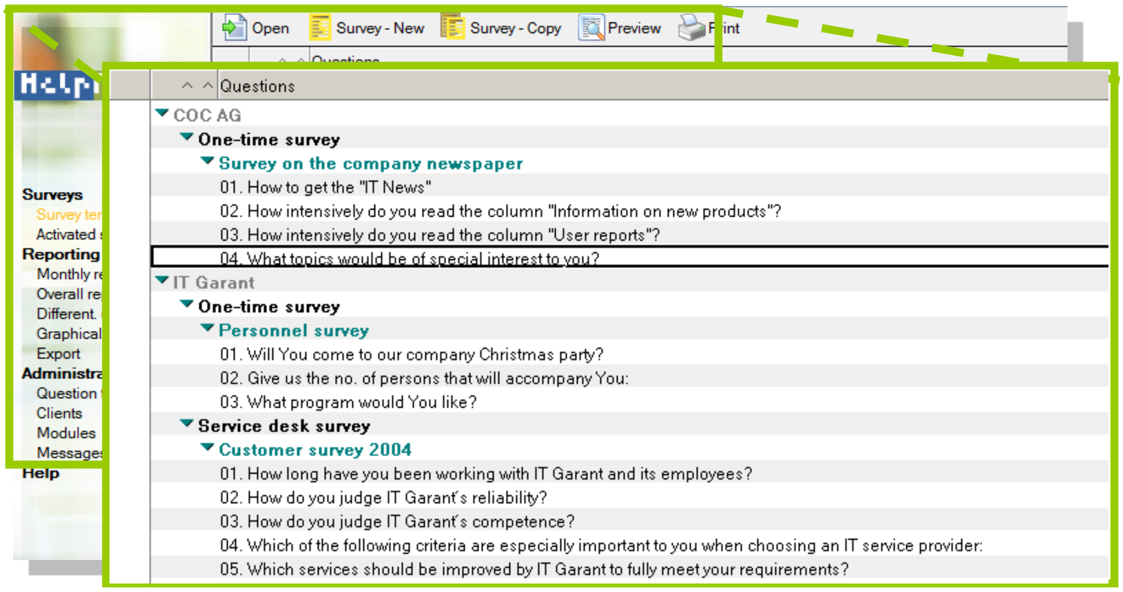

Fig. 2 Viewer

2.3 The action bar

Depending on the view selected in the Navigator, you can see different buttons on the action bar (e.g. Print). This allows you to perform special actions, e.g. print the selected document.

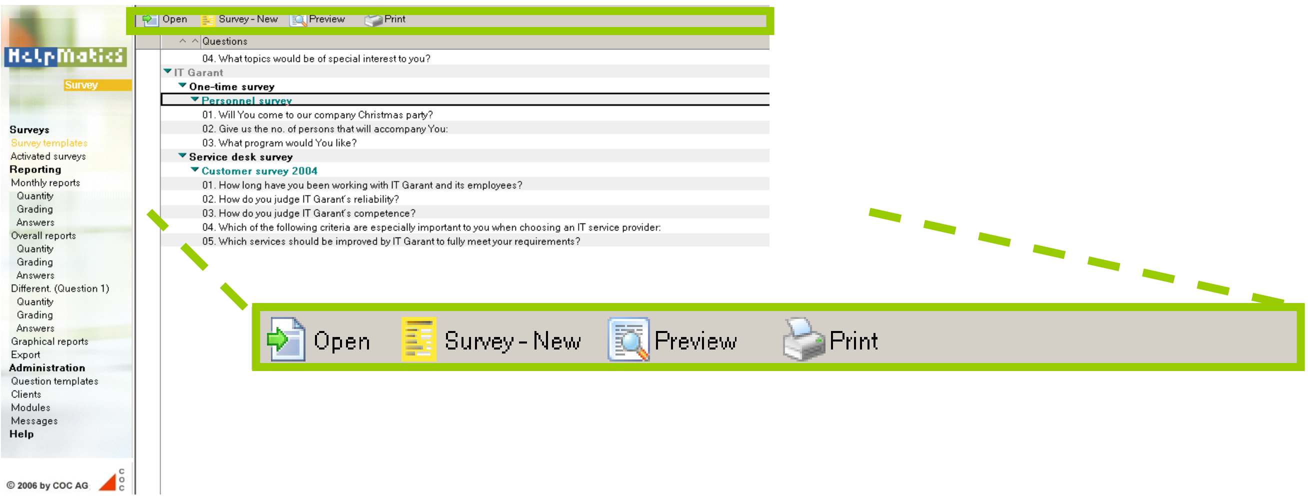

Fig. 3 Action bar

3 First steps

3.1 Access rights

Via the access control list (accessible via FILE > DATABASE > ACCESS CONTROL…) you can regulate the access rights to HelpMatics™ Survey. For this you require database access as Manager.

The assignment of roles to teams or persons controls the access of persons to different areas.

The following roles are important for the operation of HelpMatics™ Survey:

- [&R_MANAGER]
  Persons with this role have access to the Survey and Administration areas. They should be assigned the Process Editors' access level.
- [&R_Reporting] If someone is to have access to the Reporting area, he/she requires this role.
- [&R_Poll] The entries Default and Anonymous of the access control list are defined as Authors' access level and are assigned this role. This guarantees that every user can answer questionnaires without authentication.
  This role must not be assigned to persons having access to the reporting area (noncritical if they have the [&F_READALL] role in addition).
- [&F_READALL]
  and, alternatively, individual client roles control the visibility of documents.

3.2 Administration

Before you start using HelpMatics™ Survey you should check some basic settings. You will find these settings in the Navigator under Administration.

3.2.1 Modules

Here, the reference to the CMD and Admin database is to be indicated. This setting is necessary if you want to carry out one-time surveys with ServiceDesk users and in order to be able to automatically transfer the existing clients. For Web access it is important to specify the http-Llink, e.g. http://serverA/HelpMatics/survey.nsf.

Continuous surveys: Optionally repeated surveys can be prevented. You can set the period within which a user should not receive the same questionnaire.

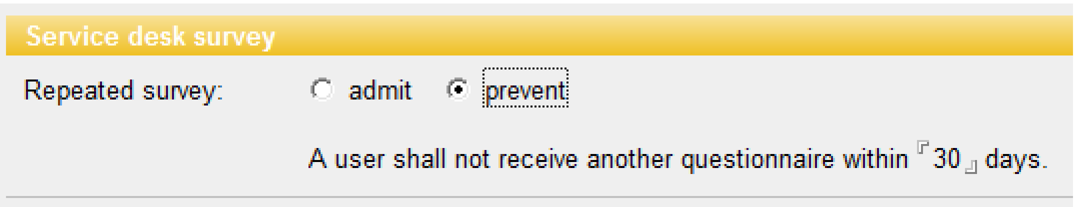

Fig. 4 REPEATED SURVEY setting in the Administration - Module area

The information as to which user has already received a questionnaire will be temporarily encrypted and stored.

3.2.2 Clients

Here you see the available clients. All clients with the corresponding data are automatically transferred from HelpMatics™ ServiceDesk. Already existing clients are updated – identified by the client's initials (consisting of two to three capital letters).

Via the CLIENT – NEW action, further clients can be created, if required.

3.2.3 Question templates

Templates for frequently used question types can be created. There, type, possible answers and grades are specified as default values. It is advisable to use meaningful descriptions such as single choice – graded – school grades or single choice – graded – percent values. The descriptions, which have to be unique, will later be used for selecting a question template when defining questions within a survey.

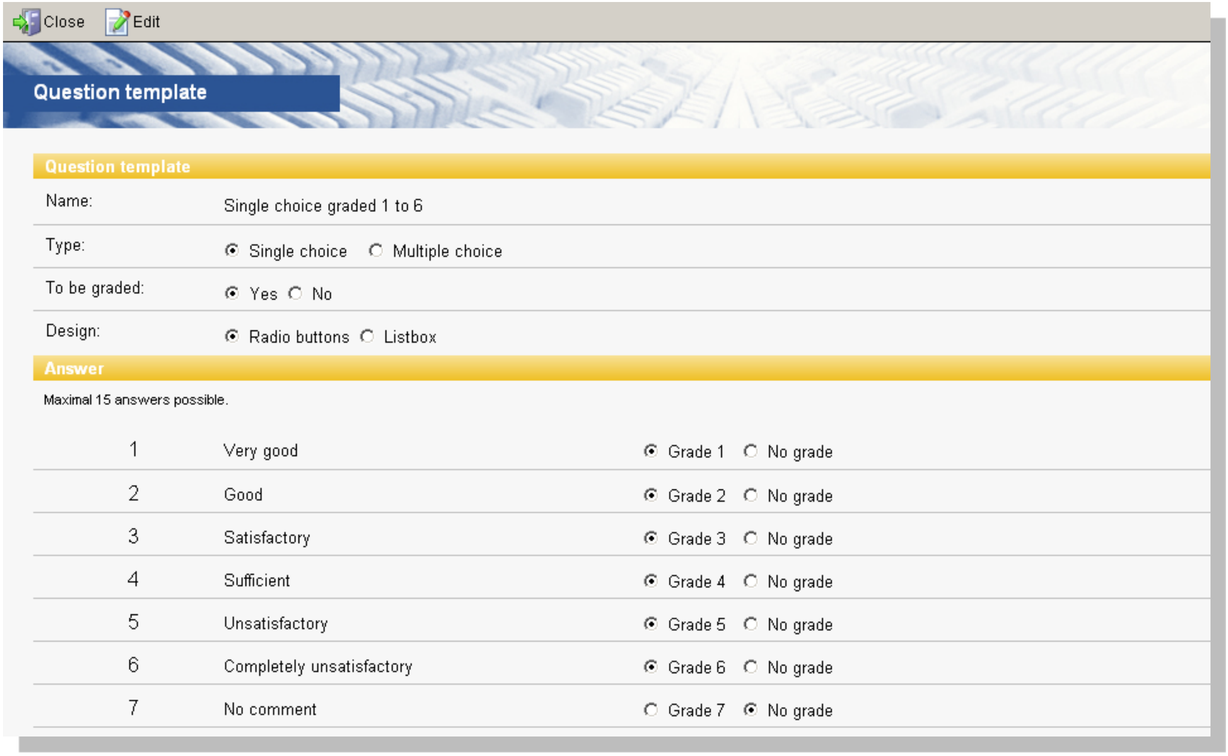

Fig. 5 Questionnaire-template

3.2.4 Messages

Warnings (red icon) and messages (green icon) coming up in the program are listed here.
Please check this view at regular intervals to be sure that your surveys run correctly.

3.3 Examples of surveys

To get an idea of the features of HelpMatics™ Survey, you will find some examples of survey templates under SURVEYS > TEMPLATES.

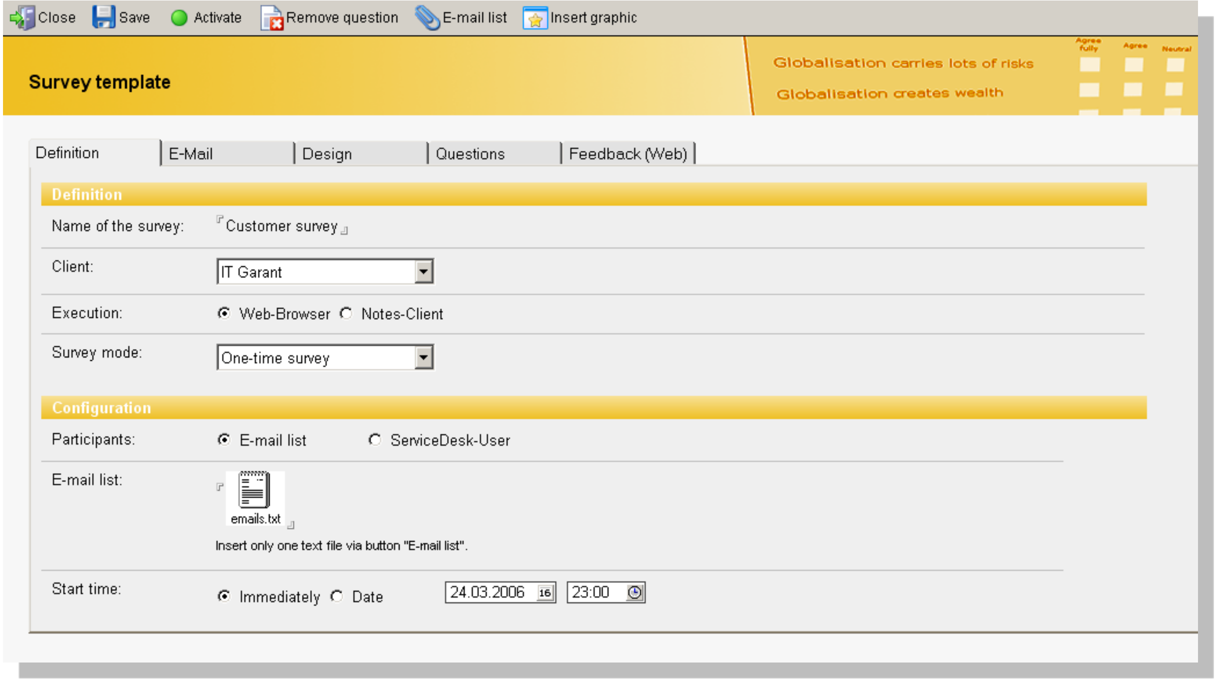

Fig. 6 Example of a questionnaire template

4 How to create a survey template

4.1 Survey - New

Click SURVEYS > TEMPLATES in the Navigator and SURVEY > NEW in the action bar of the Viewer. A new survey template opens in edit mode. The survey data is arranged according to topics and subdivided into several tabs.

4.1.1 Definition

Here you can define basic general data of the survey:

- Name of the survey (mandatory field):
  Enter a name for identifying surveys derived from this template. The combination of name and date of activation of the survey ensures a unique identification of each survey.
- Client (mandatory field):
  The selection list contains all clients that have been imported from HelpMatics ™ ServiceDesk or have been created under Administration (see 3.2.2). The survey will only be sent to users of the selected client (not relevant when using a text file with the participants' e-mails). In addition, the visibility of surveys and questionnaires can be controlled for persons with access rights.
- Client for Survey:
  The following options are available:
  - Web Browser The survey will be conducted in the browser.
  - Notes Client The survey will be opened as Notes document (useful if the users to be surveyed have a Notes client that is permanently open during the operation.)

  Depending on the option that has been chosen, a Notes link or a web link will be inserted in the e-mails relating to the survey via which the questionnaire can be opened. Note concerning HCL Notes R5: A Notes link first opens the Notes client if it is not open yet. You then have to click the link once more to open the questionnaire.
- Question mode: The following options are available:
  - ServiceDesk Survey
    Specify the systematic random selection. ServiceDesk surveys are intended for users for whom a ticket in HelpMatics ™ ServiceDesk has been closed. If, e.g., you specify every 2nd user, an e-mail will be sent to the respective user for every second closed ticket of the selected client. Only one ServiceDesk survey can be conducted for each client at the same time.
  - Change survey
    In a Change survey the survey is sent to the person requesting the change as soon as the change receives the status closed (applies to standard changes). Several Change surveys with different filter settings can be active per client:
    - without category filter
    - with category filter up to three levels

    When the survey is sent, the survey with the more explicit filter may have priority.
    Example:
    Survey A without category filter, survey B with category filter:
    If the category of the closed Change document fits survey B, the requester will receive survey B, otherwise survey A. Note: Despite a fitting category filter, a different random selection setting may cause the requester to receive survey A.

    If the category filter is specified on the same level (e.g. two surveys with filter set on main category), an unambiguous assignment of the survey is guaranteed.
  - One-time survey
    Specify the time and participants of the survey.
    Option 1: One-time surveys may be directed to users of a HelpMatics™ ServiceDesk client: You can display the number of users by clicking this button. The number determined in this way will not be updated automatically and only takes users with an e-mail address into account.

Option 2: The survey may also be addressed to a selection of recipients and is attached to the survey template as a plain text file. In this text file the e-mail addresses must be separated by line breaks. With the appropriate rights ([&R_MANAGER] role in Survey), such a text file including the e-mail addresses of the users can be created in the User View of HelpMatics™ ServiceDesk via the Export (E-Mail) button. In the export, only users that have e-mail addresses will be considered. In the comment lines (starting with #) of the file, details relating to the export are stored.

Clicking on Insert opens the dialog box for creating file attachments. After the selection of the text file, the file will be inserted into the e-mail list field. This button only appears on the action bar if E-mail list has been selected as option in the Participants field of the Configuration section (Definition tab).

Note
You can set the time of the survey to Immediately. This option is primarily intended for test surveys. For productive surveys, you should fix a time in any case. The survey will then be conducted in the background on the server.

- Public Survey (for Web surveys only)
  Information relating to configuration and e-mail is not required here since no e-mails will be sent to participants but the link to the survey can be published after it has been activated.
- Continuous survey
  This is a weekly employee survey irrespective of the ticket. The users of a client are subject of the survey with the users being determined according to the specified number and selected randomly. As is the case with service desk surveys, repeated surveys can be excluded for a defined period.

4.1.2 E-mail

Define the design of the survey e-mail there. The following fields are available:

- Sender (mandatory field)
  Specification of the sender of the survey e-mail.
- Subject
  This text will be displayed in the reference of the survey e-mail.
- E-mail text
  Here you can enter instructions and further information relating to your survey. In the survey e-mail, the link to the survey will be inserted under it. Alternatively, you can position the link anywhere in the text by using the placeholder <Link>.

Note
Depending on the mail server settings the link may be wrapped (if a line break has been inserted). The link will not function in this case. In your e-mail text you can point out to the users that the vertical spacing might have to be removed from the link.

In ServiceDesk surveys you can additionally use the placeholders <Ticket ID> and <Brief Description> to include information from the ticket in the survey e-mail.

4.1.3 Design

Here you can define the design of the questionnaire. The fields below are available for the design.

- **Design options (web)**
  - Question text:
    It is recommended to choose a text color that contrasts well with the background you selected for the question bar (see below). The standard text color is black. Type size and font can also be set.
    The color is selected via the color selection button.

- Question bar background:
  The color selection button is used to define the color of the question bar so that it goes with the question text color. A precondition is, however, that Color has been selected as background type. If a graphic has been selected as background, the questions are displayed without question bar.
- Answer text:
  The color of the answer text is set via the color selection button.
  Type size and font can be set.
- Background type:
  Depending on whether Color or Graphic has been selected, the Color Background field or Graphic Background field will be displayed.
- Color background (kind of background: Color):
  The desired color is selected via the color selection button.
- Graphic background (kind of background: Graphic):

  By clicking on Insert the dialog box for creating file attachments is opened. Having selected the image file with the desired background graphic, the attachment is created in the Graphic Background field.

➢ **Questionnaire header**

- Header text:
  The header text can be freely formatted. You can also enter a text for the heading here and format it as you wish.
- Introductory text:
  Freely formatted introductory text for surveys. In multi-page surveys this text only appears on the first survey page.
- Logo / banner (Web)
  The banner will be displayed at the top of the questionnaire, the logo will be displayed top right.

  By clicking on Insert the dialog box for creating file attachments is opened. Having selected the image file with the desired logo, the attachment is created in the Logo (Web) field.
- Logo / banner (Notes client)
  The banner will be displayed at the top of the questionnaire, the logo will be displayed top right.
  To insert a logo, first open the logo in a graphic program (e.g. Microsoft Paint), select the image and copy it to the clipboard via Edit > Copy. Then position the cursor in the Logo (Notes-Client) field and paste it via Edit > Paste (Copy & Paste function).

➢ **Questionnaire footer**

- Footer text:
  In the footer text you can define the design of the questionnaire footer. The text can be freely formatted and appears in the questionnaire below the list of questions.
- Send button:
  Here you define the labeling of the Send button.

4.1.4 Questions

At the top area, you can define for surveys with Web client before which question number a page break is to be inserted and which button texts are to be used for paging forward or back. Moreover, a text can be entered here that is to appear above these buttons, e.g. “Navigate here”.

- Page Break before Question (for Web surveys only) Here you can define before which question number a page break is to be inserted for a clearer representation of the survey. The individual question numbers are to be separated by commas, e.g. 1,4,7 for inserting a page break before question No. 1, 4 and 7. If you enter a number higher than the number of questions available, this number will be ignored.
- Button texts (for Web Surveys only) Here you define which texts are to be displayed on the buttons for paging forward and back. “Back” and “Forward” are default texts.
- Navigation header (for Web Surveys only) Text to be displayed above the buttons for paging forward and back.

Then follow the lines for entering the questions. Questions 1 to 25 can be defined by clicking on the small button next to the numbers. A dialog will be opened to define the individual questions.

Just like answer choice texts, the questions can be formatted by HTML tags. This allows you to e.g. highlight terms or offer a link to additional information.

The following question types are available:

- Free text
  A field for entering free text is available for answering the question.
- Single Choice
  Up to 15 possible answers can be defined. If graded is selected, the grades will be displayed next to the answer. It is possible to mark entries that are not to be graded (e.g. grades from 1 to 6 and, as an option that is not to be graded, No Comment for No. 7 or, e.g. Yes, No, No comment). If you want to compare different grading questions with each other, it is necessary to use the same grading scale.

  There are two different designs to choose from: Are the possible answers to be displayed in the form of radio buttons or as listbox? The following is to be taken into account when using the listbox design: When using the Web front-end (for answering the questionnaires), the first possible answer of the questionnaire will be set as default. Here it is therefore recommended to choose an entry such as <no comment> or something similar. If grading is selected for the question, the answer defined for grade 1 will be set as default in the listbox.
  Tip: The provision of a <No comment> option is also useful for the **radio buttons** variant if answering shall not be mandatory. So the user has the option of cancelling an answer he gave by mistake.
- Multiple Choice
  Up to 15 possible answers can be defined. You can select as many answers as you like.
- Matrix question – single choice (for Web surveys only)

  Up to 15 possible answers can be defined that form the matrix columns. Moreover, there are maximally 15 question lines (matrix lines) available that are separated from each other by pressing the Return key. Additionally, grading can be activated.
  You can use a template for single choice questions as question template. Subsequently, change the question type to matrix question – single choice and enter the question lines.
- Matrix question – multiple choice (for Web surveys only)

  Up to 15 possible answers can be defined that form the matrix columns. Moreover, maximally 15 question lines (matrix lines) can be used.
  You can use a template for multiple choice questions as question template. Subsequently, change the question type to matrix question – multiple choice and enter the question lines.

In addition you can indicate for each question if answering shall be mandatory. If the recipient of the questionnaire does not answer questions defined as mandatory, he/she will receive the message you specified in the Request for answer field of the Feedback (Web) tab before sending the questionnaire, together with a list of the respective questions.

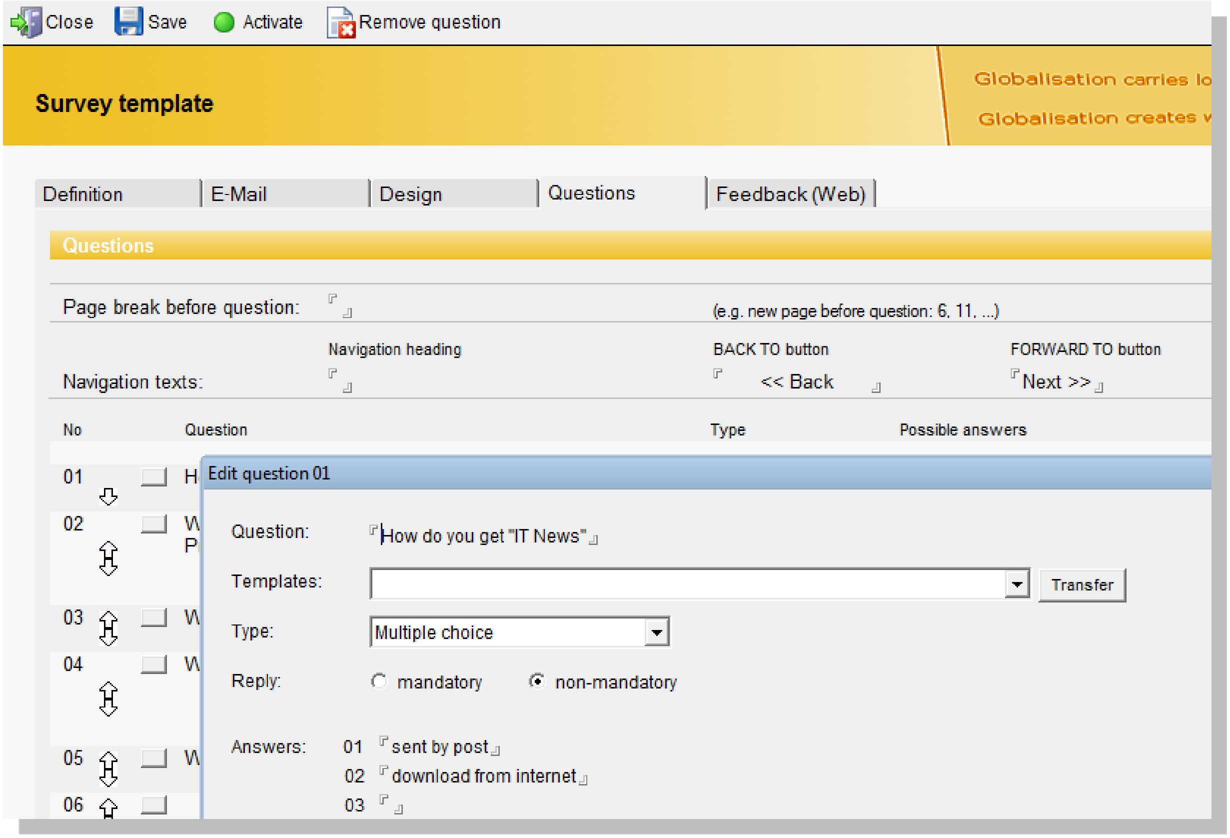

Fig. 7 Dialog window for creating templates

If you have created question templates, you can select an appropriate one via the Templates listbox. By clicking Transfer, the field values will be filled automatically – the only thing you have to do is to formulate the corresponding question.

After closing the dialog window by clicking OK, the specified data will be transferred to the Questions tab at the appropriate place. To remove a question, click the Remove question action and select the number of the question to be removed in the selection list.

If you want to change the order of your question catalog later, please use the arrows next to the questions. By using the up arrow button, the selected question is exchanged for the question positioned directly above it together with its type and possible answers. Accordingly, the down arrow button is used for changing the position of questions in downward direction.

By repeatedly changing the position of questions via the arrow buttons, they can be moved to any position of the question list.

4.1.5 Feedback (Web)

In Feedback (Web) you specify the message to be displayed to the user after sending the answered questionnaire, and if access to the survey result is to be possible:

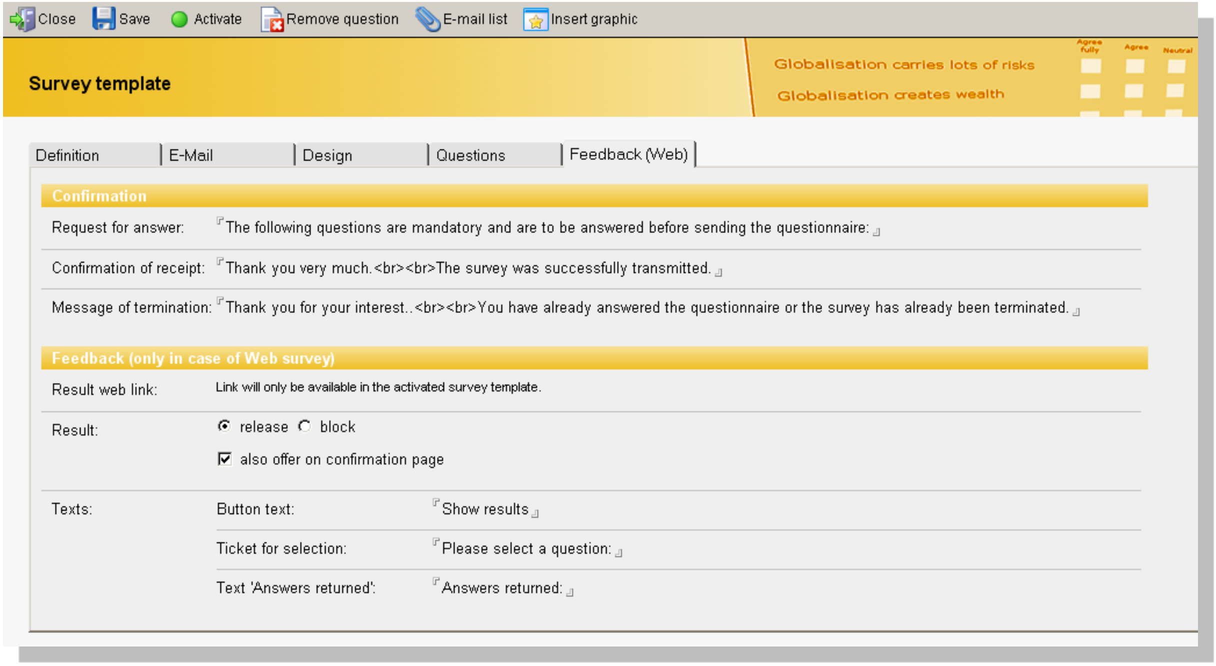

Fig. 8 Feedback (Web) tab in a survey template

The Request for answer field is relevant if you have selected the Reply: mandatory option for questions (see 4.1.4 Questions).

In the CONFIRMATION OF RECEIPT field you enter the text confirming to the user that his/her questionnaire has arrived. You can use HTML to format the text. Example: Enter the characters <br> where you wish to break a line.

The message of termination will be displayed when a user opens a questionnaire that has already been answered or when the survey has already been terminated (see 5.4).

Access to the survey result can be blocked (block result option). Indicate in the information text which message the user is to receive when attempting access. If you release the result, you can copy the result Web link to the clipboard via the Copy Web link action, thus making the result available to the users, e.g. in the Intranet (action is available in the activated survey document).

In addition, you can offer the current survey result to the user after he/she has answered his/her questionnaire (also offer on confirmation page option). A button will then be displayed below the confirmation of receipt or the message of termination that leads the user to the results page. Here individual questions (except for free text questions) can be selected for which the corresponding bar chart with legend will be displayed. In this case you can define the texts to be displayed.

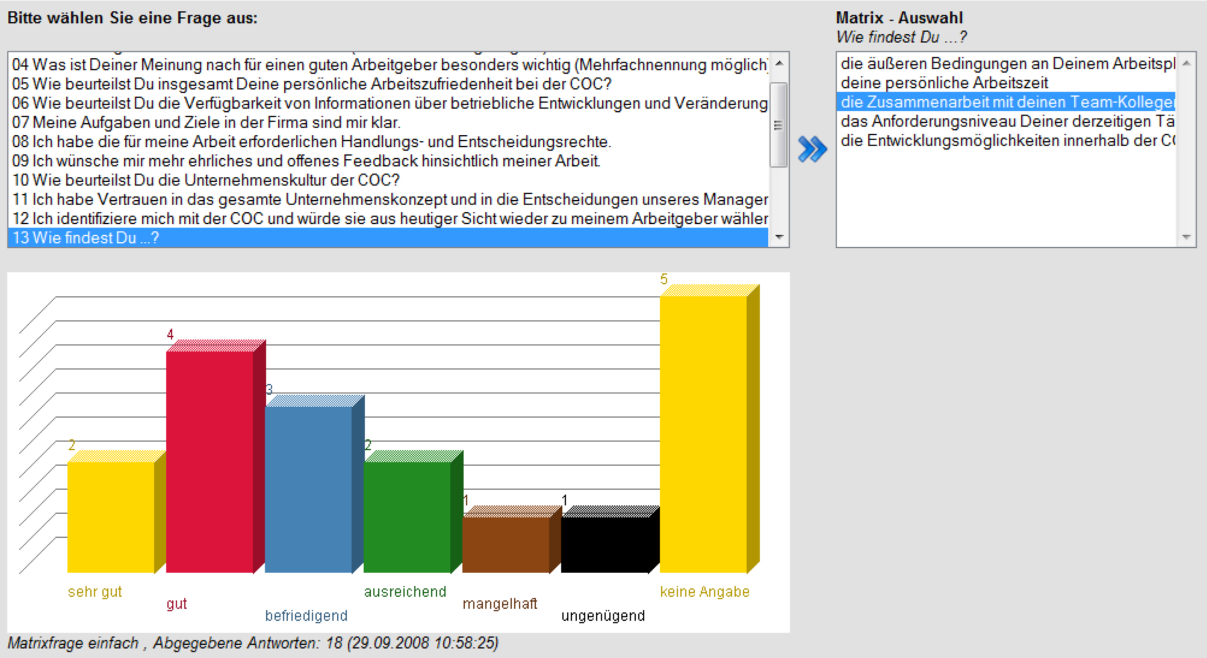

Fig. 9 Evaluation of questions – here matrix questions – in the Web

4.2 How to copy an existing survey template

If you want to create a new survey template based on an already existing one, you can make a copy: Position the cursor in a non-categorized line (a question) of the survey template and in the action bar click on Survey - Copy. This will open a window where you have to enter the name of the survey you copied. Having confirmed the entry with OK you get to a detail view where you can edit, save or activate your survey copy.

5 How to activate a survey

5.1 Before activating the survey

Before activating a survey you can display the preview of the questionnaire via the PREVIEW button in the action bar. The preview in the browser requires Web authentication.

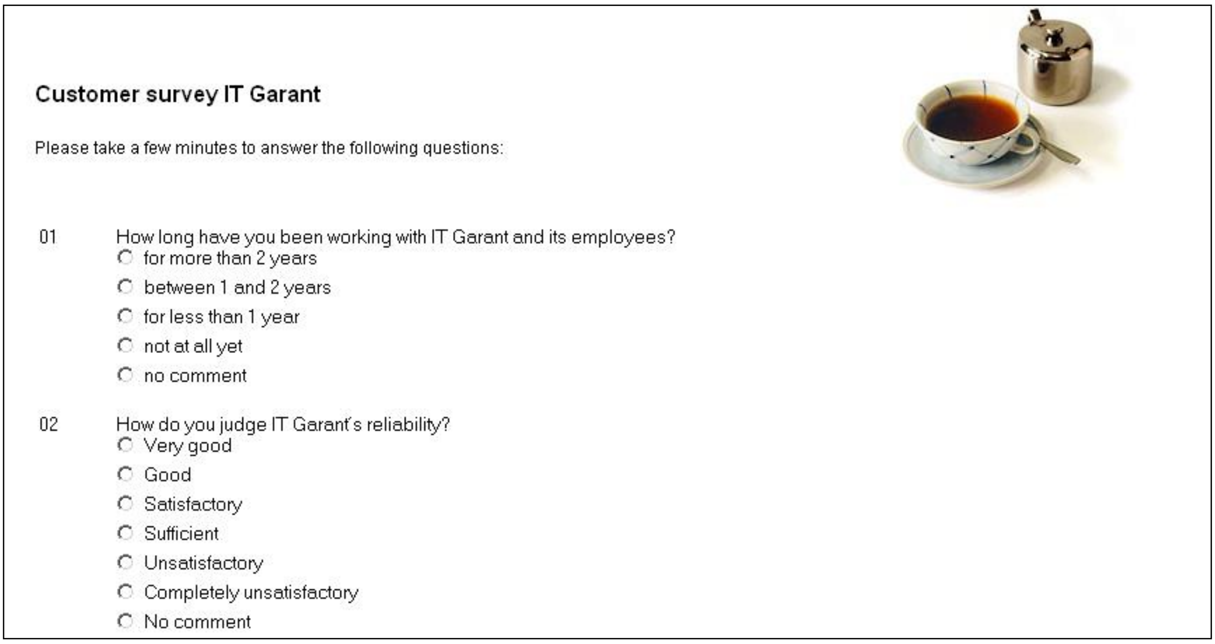

Fig. 10 Preview section of a questionnaire

In the case of surveys that are sent to a large number of recipients at the same time it is advisable to first perform a test run with only a few recipient addresses. Set the survey mode option to ONE-TIME SURVEY and insert as E-mail list a text file with e-mail addresses of only a few test persons by clicking Insert.

5.2 Activating the survey

Open a survey template by double-clicking any question you like (one of the non-categorized lines in the Viewer under Surveys – Templates). Change to the edit mode by clicking Edit. The ACTIVATE action will then be available to you in the action bar. As a result of the activation, a survey will be created from the survey template and the date of activation of this survey will be set to the current time. If you have set the time of the survey to the IMMEDIATELY option, the questionnaires are sent now. The current sending status is displayed in the status bar.

You will find the activated survey under SURVEYS > ACTIVATED SURVEYS. As concerns one-time surveys, the activation date is displayed in the ACTIVE ON column (when will the questionnaires be sent or when have they been sent); as concerns continuous surveys, it is displayed via the Activate button in the document.

5.3 Stop sending

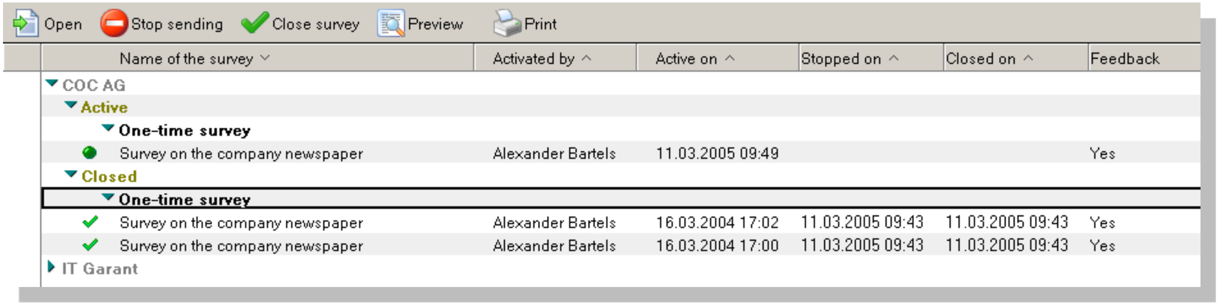

Fig. 11 Activated Surveys view

The Stop sending action in the ACTIVATED SURVEY view has, in continuous SERVICEDESK AND CHANGE SURVEYS, the effect of no further surveys to be sent. It is, however, still possible to answer questionnaires that have already been sent.
If you want a scheduled one-time survey not to be activated, you can delete it in the Activated surveys view.

5.4 Close survey

Via the CLOSE SURVEY action in the ACTIVATED SURVEYS view, all questionnaires that have been sent are blocked and/or, in case of a public survey, access to the published questionnaire is blocked in order to make further answering impossible. The time when a survey has been closed is displayed in the CLOSED ON column.

6 Activated surveys

6.1 View

In the SURVEYS > ACTIVATED SURVEYS view, all surveys activated on basis of a survey template are listed (see 5.2), categorized by client and status.

- Status PLANNED
  One-time surveys for which a future survey date has been set are assigned this status until the questionnaire will be sent
- Status ACTIVE
  - ServiceDesk and Change surveys – as long as the distribution of questionnaires has not been stopped and the survey has not been closed yet.
  - One-time surveys the questionnaires of which have already been sent, but which have not been closed yet.
  - Public surveys that have not been closed yet.
- Status STOPPED
  The continuous distribution of questionnaires can be stopped in case of ServiceDesk and Change surveys. Questionnaires that have already been sent can still be answered.
- Status CLOSED
  If a survey is closed, questionnaires relating to this survey can no longer be answered. When accessing the link, the user receives a message to be defined in the Feedback tab.

6.2 Copy Web links

Open an activated survey in order to copy the link to the survey (public surveys only) and/or the link for displaying the survey results to the clipboard via the copy web Link button. You can provide this link for the users, e.g. in the Intranet.

- Web link: survey This link is displayed in the Definition tab in an activated public survey. The link leads the user to the published questionnaire.
- Web link: result This link is displayed in the Feedback (Web) tab in every activated survey. You can set via options whether the link is to be released and – independent of any further publishing – is to be available on the confirmation page after sending.

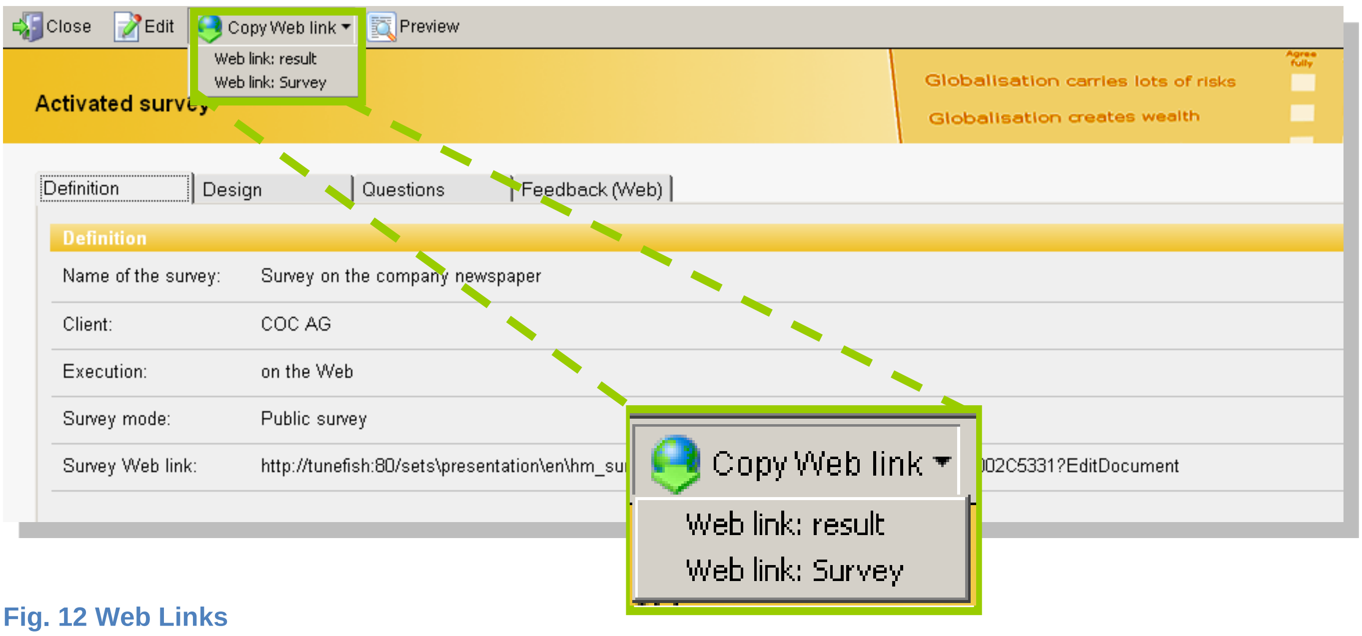

Fig. 12 Web Links

6.3 Subsequent changes in activated surveys

The Design, E-mail and Feedback (Web) areas can still be adapted after activation of a survey.
The changes are effective as of saving.

Examples for sensible changes:

- The e-mail text for a one-time survey with status Planned is to be changed.
- The survey result shall be released only after closing the survey (until then, the result will be blocked showing the info-text: The result will be published by <Date>....).

7 Reporting

In the standard design, the following reports are available. Information on the report will also be displayed by clicking Report info in the action bar.

7.1 Monthly Reports

All views are identical in the first levels: Client, name (with date of activation), year and month of sending the questionnaire.

Further categorizations are view-specific:

7.1.1 Quantity

In addition to the number of questionnaires, the proportion of answered to unanswered questionnaires, i.e. the return (absolute and relative), is to be seen here.

7.1.2 Grading

Selection: Only questionnaires that have been answered. This view shows the average grades of single choice questions. Ungraded questions and answers are not displayed here.

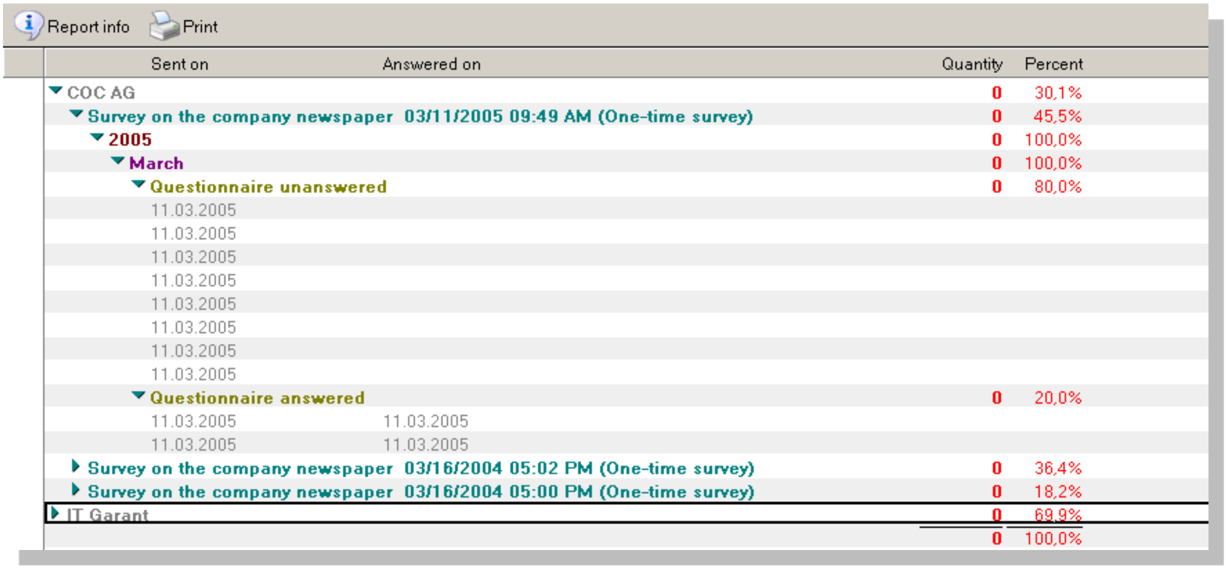

Fig. 13 Example of a questionnaire template

7.1.3 Answers

Selection: Only questionnaires that have been answered. In this view, categorization is made according to question type and answer. The frequency of given answers is shown absolutely and relatively. The remark _no answer refers to unanswered questions.

7.1.4 ServiceDesk

This report allows a separate analysis of tickets solved in the 1st level or after being forwarded to other process editors/teams.

7.1.5 Change

This report contains only Change surveys.

7.2 Overall reports

All views are identical in the first two levels: Client and name of the survey (with date of activation).

Further categorizations are view-specific:

7.2.1 Quantity

In addition to the number of questionnaires, the proportion of answered to unanswered questionnaires, i.e. the return (absolute and relative), is to be seen here.

7.2.2 Grading

Selection: Only questionnaires that have been answered. This view shows the average grades of single choice questions. Ungraded questions and answers are not displayed here.

7.2.3 Answers

Selection: Only questionnaires that have been answered. In this view, categorization is made according to question type and answer. The frequency of given answers is shown absolutely and relatively. The remark _no answer refers to unanswered questions.

7.3 Categorized (Question 1)

Here you'll find surveys the first question of which is of the single choice type. The results will be categorized according to the first question. In a questionnaire, for instance, which first of all asks for the user's department, the answers can thus be viewed categorized by departments.

All views are identical in the first two levels: Client and name of the survey (with date of activation).

Further categorizations are view-specific:

7.3.1 Quantity

In addition to the number of questionnaires, the proportion of answered to unanswered questionnaires, i.e. the return (absolute and relative), is to be seen here. Answered questionnaires are additionally categorized according to the answer to the first question.

7.3.2 Grading

Selection: Only questionnaires that have been answered. This view shows the average grades of single choice questions. Ungraded questions and answers are not displayed here.

7.3.3 Answers

Selection: Only questionnaires that have been answered. In this view, categorization is made according to question type and answer. The frequency of given answers is shown absolutely and relatively. The remark _no answer refers to unanswered questions.

7.4 Graphical reports

This area permits direct graphical editing of the surveys within HelpMatics™ Survey. You can store reports for reuse and display the results as bar, pie or line chart (Requirements: installation of Microsoft Excel 2000 or higher).

The data is processed at night, which optimizes the speed of the graphical display. Although it is possible to immediately activate refreshing by clicking the Reload data button, this is only recommended in times of low server workload.

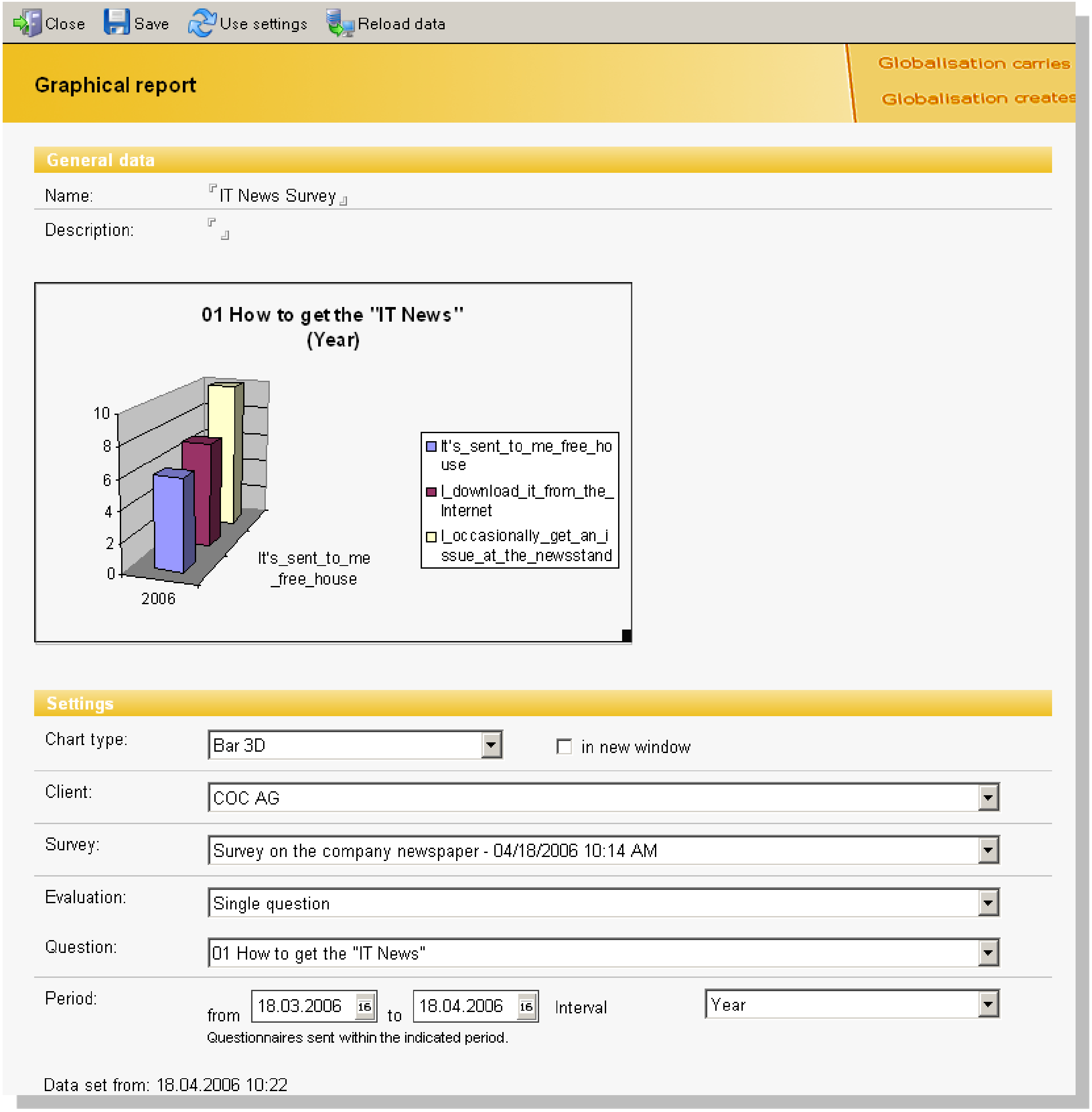

Fig. 14 Graphical reports

How to create a new report:

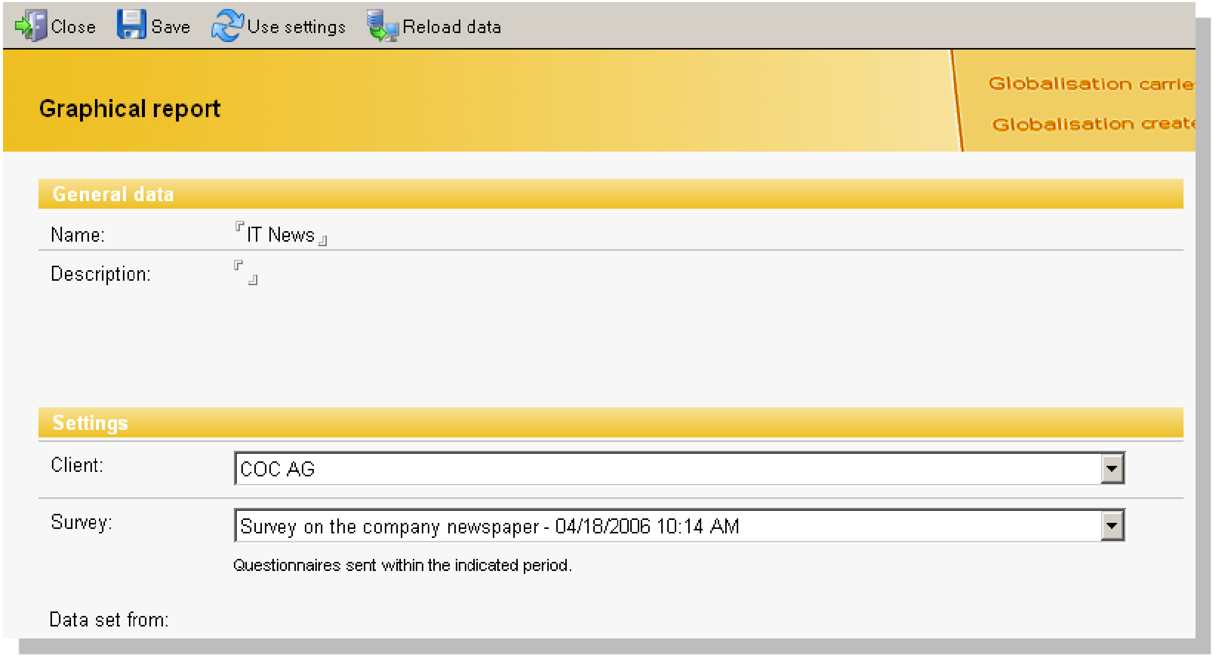

Fig. 15 Create a graphical report

- Click Report > New in the action bar of the view.
  Now you can enter name and description of the report. Select the client and the desired survey in the Settings area.
- In order to load the prepared data, click Reload data. You can retrieve the last saved data set or request immediate refreshing. The new report will be saved and closed automatically.
- Select the new report from the view and open it. Now you can make further settings:
  - Selection between different chart types
  - Output directly in Excel via the in separate window checkbox. Otherwise embedded in the report.
  - Select the client and the survey you want to evaluate (in case of a change, the data has to be reloaded).
  - Select the evaluation criteria under Evaluation: Single question or Compare 2 questions, set the desired question(s) and specify evaluation period and interval (please note: This function is not available for matrix questions).
  - By clicking the Apply settings button the data will be displayed in the form of the selected chart type.
- After clicking Save the settings made will be kept for further use.

7.5 Export

In order to further evaluate data, an interface to MS Excel is available here (requirement: installation of Microsoft Excel 2000 or higher). A file with the selected data will be created:

- Select the survey (sorted by client, name and date of activation of the survey).
- Select the question types to be exported.
- Determine the period (referring to the date of sending the questionnaire).
- Click Export data to perform the Excel export.

7.6 BI report

This specific view is intended to facilitate access to evaluation relevant data.

Name:	(Reporting\BI\Graded)
Alias:	vwBI_Graded
Selection:	Questions answered with grading of all questionnaires
Access:	[&F_REPORTING] role is necessary
Use:	This view can be used for evaluating questions with grading

7.7 Crystal reports

Several predefined reports in Crystal Reports format are included in delivery. For questions concerning the configuration, refer to the Administrator manual (chapter Interfaces).

8 General actions

8.1 Print

In all views, the menu item Print is available in the action bar.

8.1.1 Print – View:

The current view will be printed.

8.1.2 Print - Document

Select the document or documents to be printed as questionnaire(s).

8.2 Edit

Modifications (to a survey template or to settings in the Administration area) can only be made in the edit mode. For doing so, click Edit in the action bar after opening the document (by double-clicking the respective line).

8.3 Save

Having made modifications in the edit mode, you can confirm them by clicking Save. The modifications will be checked as to completeness and plausibility. The document will only be saved if these conditions are met.

Imprint

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