

Remark Web Survey[®]

Version Professional Edition
for Windows[®]

User's Guide Addendum: Important Information about Using Remark Web Survey

August 2015



Remark Products Group
17 General Warren Blvd.
Malvern, PA, 19355-1245 USA
www.remarksoftware.com

Disclaimer

The information contained in this document is subject to change without notice and should not be construed as a commitment by Gravic, Inc., who assumes no responsibility for any errors or omissions. Gravic, Inc. reserves the right to revise this document and to make changes to the products described herein for the purpose of product improvement at any time, without obligation to notify any person of such revisions or changes.

Notice

The information contained in this document is the exclusive property of Gravic, Inc. This work is protected under United States Copyright Law and other international copyright treaties and conventions. No part of this work may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, or by any information storage or retrieval system, except as expressly permitted in writing by Principia Products. All requests should be sent to: Gravic, Inc., 17 General Warren Blvd., Malvern, PA 19355 USA. Attention: Product Manager.

Trademarks

Remark Web Survey, Remark Office OMR, Remark Classic OMR, Remark Quick Stats, Remark, Gravic and Principia are registered trademarks and Remark Live Stats is a trademark of Gravic, Inc. Other products mentioned are trademarks of their respective holders.

Copyright

Copyright © 2015 Gravic, Inc. All Rights Reserved. Specifications subject to change without notice.

About Gravic, Inc.

Gravic, Inc. is a world leader in providing innovative data collection, transformation, and distribution solutions. For over 35 years, our software product groups have produced technologically advanced solutions that improve the businesses and personal lives of our over 75,000 customers and tens of thousands of OEM end-user licensees.

Gravic is a privately-held corporation located in Malvern, PA, near Philadelphia, PA USA.

Remark Products Group History

The Remark Products Group of Gravic, Inc. was founded as Principia® Products in 1991. We have worked in the area of image processing and pattern recognition since the early 1980's. Our early work in OCR and ICR sold thousands of licenses. In 1991, we began to focus on OMR (optical mark recognition) with image scanners (Remark Office OMR® 1.0 release). Our strength is in our ability to innovate and develop solutions for common problems, while maintaining easy-to-use and affordable software.

In 2001, we renamed Principia Products, Inc. to Gravic, Inc. and began a merger of our other entities (ITI and Compucon Services). We completed the merger in 2003 and now all product groups are run by common management.

Contents

| | |
|---|----|
| 1 Overview of Changes | 1 |
| 1.1 Designer Component Updates | 1 |
| 1.2 Server Component Updates | 2 |
| 1.3 Respondent Experience Updates | 2 |
| 2 Installation | 2 |
| 2.1 Updating the Designer Component..... | 2 |
| 2.2 Updating the Server Component..... | 3 |
| 3 Designer Component Features | 5 |
| 3.1 Clearing Imported Passwords | 5 |
| 3.2 Entering Default Fill in Appended Other Textboxes | 5 |
| 3.3 Default Fill Using Answer Piping..... | 5 |
| 3.4 Hidden Questions in Tables | 6 |
| 3.5 Email Template Updates | 6 |
| 3.6 Advanced Email Wizard | 7 |
| 3.7 Query Parameters..... | 8 |
| 3.8 Creating True HTML Emails | 12 |
| 3.9 Email Preview..... | 13 |
| 3.10 Piping Extra Fields of Data Using the Login Page | 13 |
| 3.11 Pipe Information into Other Web Forms and URLs | 15 |
| 3.12 Password Files | 16 |
| 3.13 Email Timeout | 17 |
| 3.14 Browser Preview | 17 |

1 Overview of Changes

Thank you for using **Remark Web Survey 5**. Please note that the changes outlined in this addendum include features added since Remark Web Survey 5 was initially released. The intention of this addendum is to supplement your main Remark Web Survey 5 user's guide. If you are using the Professional version of the software, you should have a user's guide in hard copy. In addition, the user's guide is installed with the software; you can find it under Start|Programs|Remark Web Survey 5|Documentation. If you are using the Standard version of the product, you only have the PDF version.

Important Note: If you are upgrading from version 5.0 to version 5.2, please read this addendum. The items listed here pertain to your upgrade even though this addendum was originally released with the 5.1 software update.

The following section provides an overview of the major changes made in Remark Web Survey since the 5.0 release. Detailed information about features is contained in the remainder of this addendum where necessary.

Note: For smaller fixes, please see the readme notes that install with the software when you apply updates (e.g., C:\Program Files\Remark Web Survey 5\rws52up.txt and rws51up.txt)

1.1 Designer Component Updates

- **Windows 7 Support.** The Designer Component was updated to be Windows 7 compatible. You do not need to do anything special to obtain this support outside of installing version 5.1.
- **Office 2010 Support.** The Designer component was updated to allow saving and opening of data in the Excel and Access 2010 formats. You can also use these formats with login page database connections and database linking.
- **Software Version Number.** You can now find your software version at the top right of the Designer Component when you click the Standard Pages node of the tree view and the bottom left corner of the status bar. This information is useful to provide when contacting Remark support.
- **Clear Password Import.** When importing passwords via a database connection on the Login Page, you can now click a Clear Connection link to remove the connection to the external database.
- **Default Fill in Appended Other Textbox.** If you set up an appended "other" textbox you can now enter default fill text that respondents will see. This feature is useful if you want to guide them on what to input.
- **Default Fill Using Answer Piping.** For textbox questions, you can use the answer piping feature when setting up a default fill. (Professional Version Only)
- **Hidden Questions in Tables.** You can now hide questions that are within question tables.
- **Invitation URLs in Email Templates.** When applying an email template to an outgoing email, the URL will not be updated to what is in the email template. It will use the web form's URL, allowing you to apply email templates from any web form to any other web form (e.g., for aesthetic purposes or merge fields). (Professional Version Only)
- **Subject Lines in Email Templates.** When saving email templates, the subject line will now be saved automatically. (Professional Version Only)
- **Friendly Names in Emails.** When sending emails, you can enter both a "From" email address and a "From" display name. For example, if you want the email to come from a group called Remark Support, you would enter an Email Address of support@gravic.com and a Display Name of Remark Support. (Professional Version Only)
- **Query Parameters.** Query Parameters have been updated so that when you send email invitations you can link to an external database to obtain the Query Parameter values. This feature allows you to send multiple invitation URLs (web form links) with varying

Query Parameter values within one email or automatically as separate emails. (Previously you had to send each email separately, typing in the desired Query Parameter value each time.) (Professional Version Only)

- **Email Preview.** An email preview was added to the email center so that you can see what emails will look like for each intended recipient.
- **True HTML in Email Center.** When creating email invitations and reminders there is an HTML Code view that allows you to edit the HTML code working behind the scenes in your email message. (Professional Version Only)
- **Piping Extra Fields from the Login Page.** You can now utilize answer piping when setting up database linking for the password question on the Login page. This feature allows extra fields to be imported in the Login Page, passed down to the data grid and piped into subsequent pages. They are also available as merge fields in outgoing emails. (Professional Version Only)
- **Piping Information into Other Web Forms and URLs.** You can now use an "Advanced" link next to the hyperlink address box, wherever hyperlinks are supported, to access the Advanced Hyperlink Builder. Here you can create hyperlink addresses that include answer pipes. This feature allows you to pipe one form's responses into another (e.g., chain web forms together) or build custom hyperlinks using piped information from the form just submitted (with or without using Query Parameters). (Professional Version Only)
- **Password File Enhancements.** To accommodate large numbers of passwords and/or login page pipes, we have added a feature to publish multiple password files. By placing the passwords in multiple files, your respondents have a faster experience validating passwords and pipes.
- **Browser Preview.** A browser preview has been added to the Web portion of the ribbon so that you can preview your form in browsers installed on your system.

1.2 Server Component Updates

- **Removed Hidden Data in Live Stats Reports.** If textbox questions are hidden on the web form, they will not appear on the Live Stats Respondent report.
- **Rights for Restricted Users.** When setting up restricted users (those who only have access to data for particular forms), permission to view a form's data will now automatically occur when the restricted user publishes the web form. You do not need to do anything (other than update your scripts to version 5.1) to take advantage of this feature.

1.3 Respondent Experience Updates

- **Button to Return to Login Page.** When a respondent's password entry on the Login Page is not valid, there is now a button to return them to the Login Page.

2 Installation

Installation of a Remark Web Survey 5 update involves installing an update to the Designer Component and replacing the Perl scripts on the web server.

Important Note: If you are upgrading from version 5.0 to version 5.2, please read this section carefully. The items listed here pertain to your upgrade even though this addendum was originally released with the 5.1 software update.

2.1 Updating the Designer Component

- 1 Download the update from the Gravic website (www.gravic.com/remark).
- 2 Save the RWS52Up.exe file to your computer.
- 3 Run the downloaded file by double clicking it.
- 4 Follow the on-screen instructions to complete the update.

Note: Beginning with version 5.1, Windows 7 is supported. You do not need to do anything special to use the software on Windows 7.

2.2 Updating the Server Component

In order to take advantage of new functionality, you will need to replace the scripts that are currently on your web server with the version latest scripts.

Important Note: Before updating the scripts to version 5.2 please note that any live forms will have to be republished from the Designer component that is also running version 5.2. Do not put the new scripts on the server until you have the Designer component updated and are ready to publish any live forms.

The following files have been updated: rwsad5.pl (administration script), rws5.pl (data script), rwsutils5.pm (utilities module), rwsimg5.pl (image script), rwsem5.pm (encryption module), rwsxml5.pm (XML parser) and rwstest5.pl (test script- only post for troubleshooting purposes). In addition, the html files located in the html subfolder have also been updated.

Note: These instructions are meant to supplement the main Remark Web Survey user's guide. You may need to consult the user's guide for detailed information about script installation and verification.

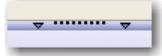
- 1 Back up your existing scripts by making copies of them and putting them in a secure place.

Important Note: Before uploading the new scripts to your web server, ensure that you understand how scripts are supposed to be placed on your web server. See Section 2.4 in the main Remark Web Survey user's guide for detailed information about installing scripts in various server environments.

- 2 Locate the new scripts, which are installed on the computer where the Designer Component (main application) is installed. After installation of the Designer Component, go to C:\Program Files\Remark Web Survey 5\Scripts to obtain the updated scripts (this directory may vary depending on where you installed the application).
- 3 Following the same instructions outlined in section 2.4 of the main Remark Web Survey user's guide, install the rws5.pl, rwsad5.pl, rwsimg5.pl, rwsem5.pm and rwsutils5.pm scripts on the web server. These scripts should replace the original version 5.0 scripts (or 5.1 if you are running version 5.1). In addition, replace all of the files in the html subfolder on the server with the updated files from the installation. Ensure the logo.png file is uploaded in Binary format if using an FTP utility; all other files should be uploaded in ASCII format.
- 4 Verify the script installation by accessing the Remark Web Survey Administration Control Panel (rwsad5.pl) in a web browser. See section 2.4.5 of the Remark Web Survey user's guide for detailed instructions.
- 5 Once you have verified that the scripts are running properly, **you must** republish any active web forms. Use caution when publishing web forms; if you will continue to use the form, do not overwrite the data, log files and temporary files when prompted.

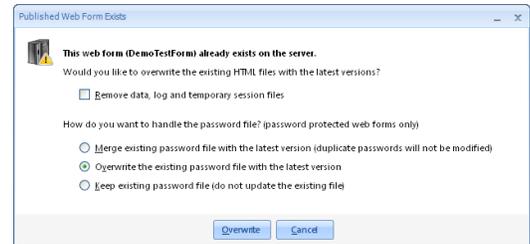
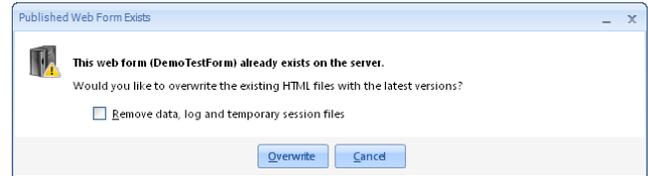
To republish forms

- 1 Open the live form in the Designer component.
- 2 When the web form is ready to publish, expand the **Admin Control Panel Access** at the bottom of the designer window (if it is not already expanded). You may view the

Admin Control Panel Access bar by either clicking the expandable splitter  at the bottom of the window, or by selecting the **View** tab from the Ribbon and then clicking **Admin Control Panel Access**.

- 3 Log in to the Remark Web Survey **Control Panel**. Enter your **Username** and **Password** and then click the **Login** button.

- 4 Once logged in, click the **Publish Web Form** button.
- 5 When the **Published Web Form Exists** window appears, select whether to **Overwrite** or **Cancel**. Before selecting a button, choose whether to remove the existing data, log and temporary session files. You *only* want to mark this option if you want to *permanently* remove the data and log files from the web server. Use extreme caution when choosing to remove these files. You will not be able to get the log files or temporary files back. If this is a live form for which you have not yet downloaded data, **DO NOT** mark this option.
- 6 [OPTIONAL] If using a password protected form, select how you would like to handle the password file. The options are:



| Overwrite Option | Description |
|--|--|
| Merge existing password file with the latest version | When using the merge option, the file you are publishing is the master. If passwords exist in that file but not on the web server, they will be added. If passwords do not exist in the file you are publishing, but do exist on the web server, they will be removed from the web server. In short, whatever exists in the file you are publishing is what will end up on the web server as valid passwords. Note that when using the merge option, the usage count for existing passwords is not affected. Therefore, if a password exists in the file you are publishing and on the web server, its usage count will not be reset. Use this option when you want to add passwords to the password file on the web server but do not want to modify the usage count (e.g., a web form is already in progress). |
| Overwrite the existing password file with the latest version | When using the overwrite option, whatever is in the password file you are publishing is what will be used on the web server. This option will reset passwords <i>and</i> the usage count. Use this option when you want to completely update the password file on the web server with the current information in your .rwsx file (e.g., after testing the form to ensure that it works, you may wish to reset all of the passwords so your respondents can begin submitting the web form). |
| Keep existing password file | When using the keep option, the password file that already exists on the web server will be used. Anything listed in the password area of the web form you are publishing will be ignored. Use this option when you want to make a change to the form that does not affect the passwords; this method will allow you to publish web form changes without affecting any passwords that may have already been used. |

- 7 Click the **Overwrite** button to proceed with the web form upload. If you do not wish to overwrite the web form at this time, click the **Cancel** button.

- 8 After the web form is published, a window will appear confirming that the web form was successfully published. Click the **Yes** button to view the web form online or the **No** button to go back to the designer.

The URLs (web form links) that your respondents use to access the web form remain unchanged as long as the new scripts were placed in the same location as the 5.0/5.1 scripts (i.e., the old scripts were overwritten). Repeat the above steps for any other active forms you need to republish.

3 Designer Component Features

The following section contains detailed information about some of the new features in the Designer Component.

3.1 Clearing Imported Passwords

This section is an addendum to section 4.9 in the main Remark Web Survey user's guide.

If you import passwords into the Password List Builder on the Login Page, you can remove the connection to the external database. Clearing the connection does not remove the passwords from the list. If you wish to also remove the passwords, either import a new list or highlight all records in the password list grid and press Delete on the keyboard.

To access the Clear Connection option

- 1 Double click the **Login Page** node in the tree view.
- 2 Click the **Password list builder** link.
- 3 Click the **Clear Connection** link. You are no longer connected to the database.

At this point you can connect to another database to import passwords if desired.

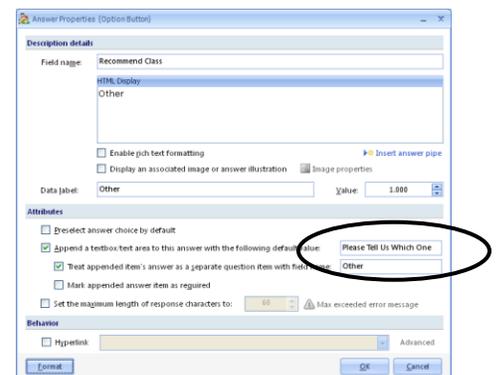
3.2 Entering Default Fill in Appended Other Textboxes

This section is an addendum to section 5.7.6 in the main Remark Web Survey 5 user's guide.

If you choose to append an "other" textbox to a question, you can enter default fill text (pre-defined text) in the appended textbox. This text will be visible to the person responding to your web form. Any default fill data is passed data down to your data set if the respondent does not replace it.

To enter default fill text

- 1 Insert a question with an appended other textbox.
- 2 Next to the item **Append a textbox/text area to this answer with the following default value** type the desired default fill text.
- 3 Click the **OK** button twice to save your changes. You should see the default fill text in the browser view.



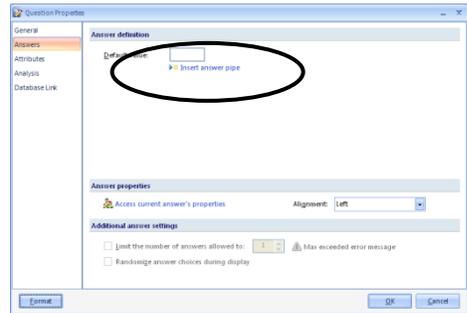
3.3 Default Fill Using Answer Piping

This section is an addendum to section 5.7.5.a on answer piping and section 5.7.6 on answer elements in the main Remark Web Survey 5 user's guide.

When using a textbox question with a default fill (pre-defined text) you can use the answer piping feature to populate the default fill text. This feature allows you to pipe a response from a question on a different page into the textbox as a default fill so respondents will see it as soon as they see the question. Any default fill data is passed data down to your data set if the respondent does not replace it.

To use answer piping as a default fill

- 1 Insert a textbox question element.
- 2 Click **Answers** on the left.
- 3 In the **Default fill**, click **Insert answer pipe**.
- 4 Choose a question from a previous page on the web form.
- 5 Click the **OK** button twice to save your changes.
- 6 When respondents fill in the web form, the response to the source question will appear as default fill text in the textbox question. A placeholder is inserted when building the web form to show that answer piping is in place.



3.4 Hidden Questions in Tables

This section is an addendum to section 5.7 on hidden questions and section 5.8 on questions tables in the main Remark Web Survey 5 user's guide.

You may hide a question or questions that are placed within a question table. If your table only contains one answer column, hiding the question will cause it to disappear all together. If your table contains multiple answer columns and you only hide the question for one of those answer columns, the question will still appear for the other answer columns. You can also hide all questions within a table to hide the table from view all together.

To hide questions within a question table

- 1 There are two ways to access the hidden attribute for questions within a question table:

Option 1:

- a. Open the table's properties by double clicking it in the tree view.
- b. Locate the question you wish to hide and click the **Edit** link under the answer group that contains the question you wish to hide.
- c. Select **Properties**.
- d. Select the **Attributes** link on the left.
- e. Mark the option for **Hide question from respondent**.
- f. Click the **Yes** button when the confirmation message appears.

Option 2:

- a. Expand the question table in the tree view.
 - b. Expand the question or questions you wish to hide.
 - c. Double click a single question to view its properties. Or, hold down the Ctrl key on the keyboard and select multiple questions. While still holding down Ctrl (if multiple questions are selected), right click and choose **Properties**.
 - d. Select the **Attributes** link on the left.
 - e. Mark the option for **Hide question from respondent**.
- 2 Click the **OK** button to return to the tree view.
 - 3 The question is now hidden in the browser view.

3.5 Email Template Updates

(*Professional Version Only*)

When creating email invitations, the web form URL is automatically inserted into the body of the email message. When using email templates, in previous versions of the software, the web form URL would be stored with the email template. Therefore, if you applied an email template to a form that utilized a different URL, the URL in the email template would override the form's URL. We have worked around this issue so that the URL that goes out with any web form invitation is always that of the active web form. You do not need to do

anything to take advantage of this functionality. When you are in the email window you will notice that the web form URL is no longer spelled out. Instead it now behaves like a merge field and looks like this: [+WEBFORMURL+]. The correct URL for the active web form will be merged in when the email is sent.

In addition, if you save an email template, the subject line is saved automatically with the template.

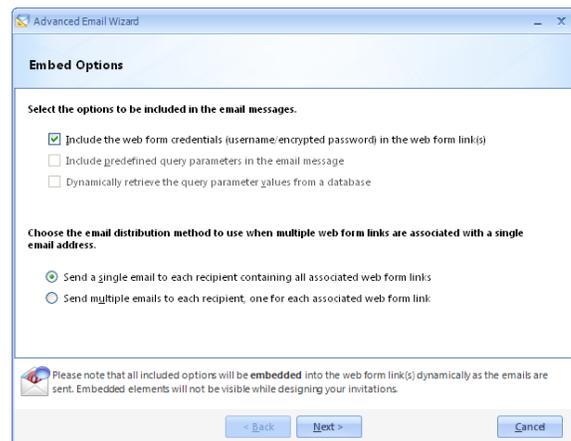
3.6 Advanced Email Wizard

(*Professional Version Only*)

An Advanced Email Wizard was added to the Send Invitations button to allow complete customization when sending emails with passwords and Query Parameters. If you are using a Login page and just want to embed the username and/or passwords into the web form invitation URL (link) you can still drop down the **Send Invitations** button and choose **Include Username/Passwords** (you can also do this in the Advanced Email Wizard). However, if you are using Query Parameters we have created the Advanced Email Wizard to walk you through setting up Query Parameters. In addition, the Advanced Email Wizard can be used to create friendly web form addresses, which are invitation links (URLs) that are presented using regular phrasing. For example, if your invitation address is `http://www.example.com/cgi-bin/rwsad5.pl?form=myform`, you could change it to friendly text that looks like this: Click here to submit your survey. However, the link would still point to the full link above. For web forms that do not use Login pages or Query Parameters, the only reason you would need to use the Advanced Email Wizard is to take advantage of the friendly web form invitations. This section does not cover the Query Parameters portion of the Advanced Email Wizard. Please see the next section (3.7) for details about using the Advanced Email Wizard with Query Parameters.

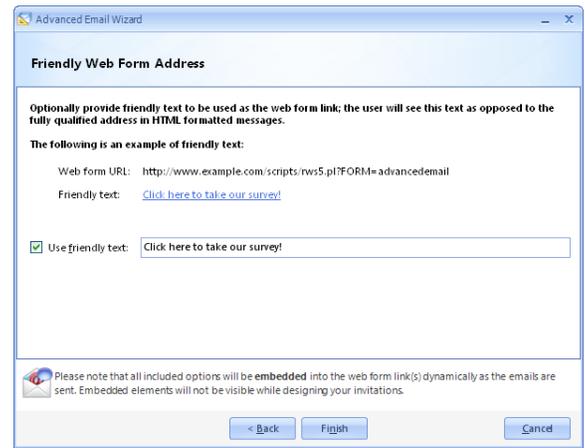
To use the Advanced Email Wizard

- 1 Click the down arrow on **Send Invitations** and choose **Advanced Email Wizard**.
- 2 In the first step of the wizard, **Embed Options**, decide whether you want to include the username/password in the invitation link (they will be encrypted and the respondent will be automatically logged into the form) and query parameters. Mark the appropriate checkboxes for each item if you intend to use them.
- 3 If you have email addresses listed multiple times in the Password List Builder of your Login page or your "To" list, determine whether you want the recipient to receive multiple emails or a single email. This option applies primarily when using Query Parameters, and will be covered in greater detail in the next section. However, if you are not using Query Parameters you still may have occasion to have multiple email addresses listed in your Password List Builder.
 - **Send a single email to each recipient containing all associated web form links:** This option sends one email to every recipient. The email contains all related web links. If multiple people are associated to the same email address, only one email will be received.
 - **Send multiple emails to each recipient, one for each associated web form link:** This option send separate emails to each recipient, each email containing only a single link.
- 4 Click the **Next** button to move to the next step, **Friendly Web Form Address**.



- 5 The default web form address (web form link or URL) is somewhat long and contains many Remark Web Survey references. You may wish to choose a “friendlier” web form address. Mark the checkbox for **User friendly text** and then type the text you want your respondents to see. When the email messages are generated, the traditional web form address will be replaced with your friendly text. The link behind the scenes will still point to the traditional web form address.

Note: Friendly Web Form Addresses are not saved within email templates. If you wish to use an email template and friendly text, use the **Advanced Email Wizard** first, then apply your email template.



- 6 Click the **Finish** button to complete the wizard and launch the email window. Be sure to use the **Preview** button to preview your email messages and ensure you have them set up as intended.

As an example, suppose you have a generic email address in your password list builder three times for three different users (support@example.com). If you use the single email option, one email message will be sent and in it will include three links (one for each person associated with the email address). This could be problematic if each password can only be used one time. All three respondents would try to use the link and the password would be expired after the first respondent logs in successfully. If you choose to send multiple emails, each recipient will receive the email (it would be sent three times; one for each iteration of the email address). However, the invitation URL would be the same for each respondent, so again, if passwords could only be used one time, subsequent log in attempts would fail.

If you were to add the option to include the username and/or password in the invitation URL, and send a single email, respondents would receive one email with all three invitation URLs. The URLs would be differentiated by user, but it would be difficult for each user to know which URL to click. However, if you chose to send multiple emails in the same scenario, each recipient associated with the email address would receive an email invitation with only his/her link. The bottom line is if you are using the same email address for multiple recipients, you must be very careful when sending emails. It is strongly advised to use differentiating usernames and passwords, along with the multiple email message option in order to get the correct invitations into your respondents' hands.

3.7 Query Parameters

This section is an addendum to section 5.7.5.b in the main Remark Web Survey 5 user's guide.

(*Professional Version Only*)

Using Query Parameters allows you to pass hidden information into a web form. When using textbox questions, you can associate a Query Parameter with the textbox. When the URL (email link) to the web form is sent out, the Query Parameter is appended to the URL. When the web form is submitted, the value for the Query Parameter is sent down to the data file.

Note: If you are not familiar with the Query Parameters feature, please read section 5.5.7.b in the main user's guide before proceeding. These instructions assume you have some basic knowledge of Query Parameters.

In version 5.1 the ability to link to an external database to enter Query Parameter values was added (previously you could only manually enter the value and had to create separate emails every time you wanted to use a new value). The value of this feature is to make sending emails easier and less time consuming. In addition, the extra fields you use when setting up query parameters that are linked to an external database can be used as merge fields when creating the email invitation/reminder.

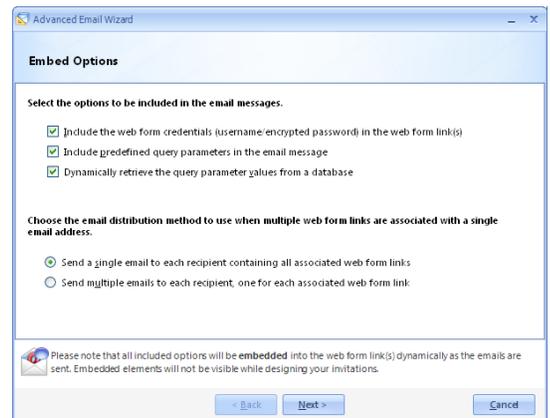
Let's take a look at a sample scenario. Suppose you are doing course evaluations at a university and want to send links to five different course evaluations to the same recipient. The course evaluation web form is the same in each case; only the instructor and course information changes. In your course evaluation you are using Query Parameters to insert a course name and an instructor name. Previously you had to generate five emails, each time typing in the course name and instructor name as Query Parameter values. Beginning with version 5.1, if you have the course and instructor names in an external file, such as a database or spreadsheet, you can link to that database file. Then you tell the software which fields contain the course and instructor information. The students' email field in the same external file is the key piece of information that tells Remark Web Survey what to send. In your external file, you will need each student's email listed as many times as you have courses and instructors for that student. When the emails are sent, Remark Web Survey will automatically insert the course name and instructor name to the URL based on each student's email address. You will have the choice of sending one email with all web form invitation URLs or separate emails, one for each web form invitation URL. If using a Login page, we recommend using one external file to hold both respondent passwords and Query Parameter values.

We will not cover how to set up Query Parameters in this addendum. Please refer to the main user's guide if you need that information.

Note: When using Query Parameters, you no longer have to hide the textbox from the respondent. Hiding the textboxes is optional. If the textbox is not hidden, you are able to use answer piping as a default fill in the textbox.

To use database linking to populate Query Parameter values

- 1 When the web form is finalized, published and tested (e.g., you are ready to go live), access the email center from the Ribbon by selecting the **Tools** tab.
- 2 Click the down arrow on the **Send Invitations** button and choose **Advanced**.
- 3 The **Advanced Invitation Setup** window appears.
- 4 [Optional] If the web form is password protected and you wish to embed the password (and username if applicable) into the URL invitation, click the **Include the web form credentials (username/password) in the web form link(s)** checkbox. If the web form is not password protected or you do not want to embed the credentials, skip to step 5.
- 5 Mark the **Include predefined Query Parameters in the email message** checkbox.
- 6 [Optional] To use the new database linking feature, mark the **Dynamically retrieve the values from a database** checkbox. This option tells the software that you are going to utilize an external database to populate your Query Parameter values (as opposed to typing each value manually).
- 7 If you have email addresses listed multiple times in your external database file (whether it's from the Login page or a new file you will link to in the next step), determine whether you want the recipient to receive multiple emails or a single email.
 - **Send a single email to each recipient containing all associated web form links:** This option sends one email to every recipient. The email contains all related web links. If multiple people are associated to the same email address, only one email will be received.



- **Send multiple emails to each recipient, one for each associated web form link:**
This option send separate emails to each recipient, each email containing only a single link.

8 Click the **Next** button to continue.

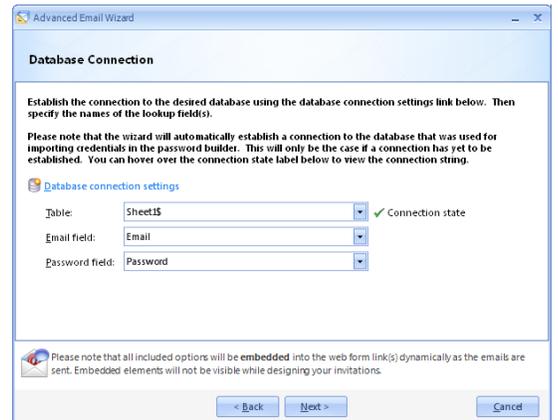
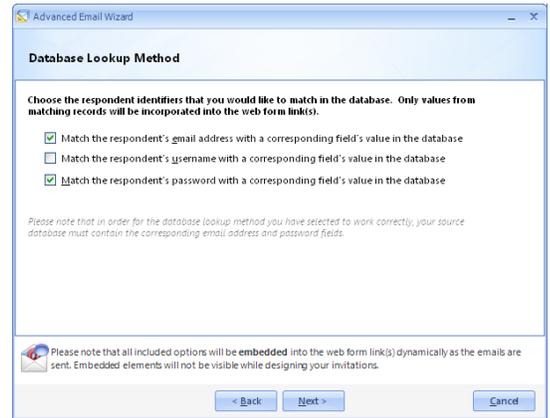
9 On the **Database Lookup Method** window, choose how you want to identify respondents: **email address, username or password**. This step is particularly important if respondents are listed multiple times in the database. In order for the correct web form links to be generated, you should validate respondents based on more than one criterion. For example, in our course evaluation sample, email addresses would be listed five times in our database because we are sending links to five course evaluations. In order to ensure the links go to the right course, you could validate respondents based on both email address and password. Alternatively you could validate respondents based on username and password. Note that the email address and username options are mutually exclusive. By validating on more than one item, you are helping the software build the proper web form links.

10 Click the **Next** button to continue.

In the **Database Connection** window, you can specify a database that contains the Query Parameter values. By default, if you have not yet gone through this wizard and chosen another database, Remark Web Survey will connect to your Login page database. To ensure accuracy we recommend using the same database for the Login page and Query Parameter values. However, if you wish to change the database connection, click the **Database connection settings** link.

Note: If you are unsure of the database being used, hover your mouse over the Connection state text to see the path and file name.

The following items can be configured:



| Property | Function |
|-------------------|--|
| Type | Choose the type of database you wish to use from the Type drop-down list. |
| Browse | Click the Open folder to select the database containing the desired information. |
| DSN | If using an ODBC connection, choose the DSN from the DSN drop-down list. Mark whether it is Directory based or DSN based . |
| Username | If your database requires a login, enter the Username . |
| Password | If your database requires a login, enter the Password . |
| Connection string | Displays the connection string that is working behind the scenes to connect to your selected database. You do not need to edit this string; it is for informational purposes only. |

| Property | Function |
|-----------------|--|
| Test Connection | You may optionally click the Test Connection button to test whether you can connect to this database. |

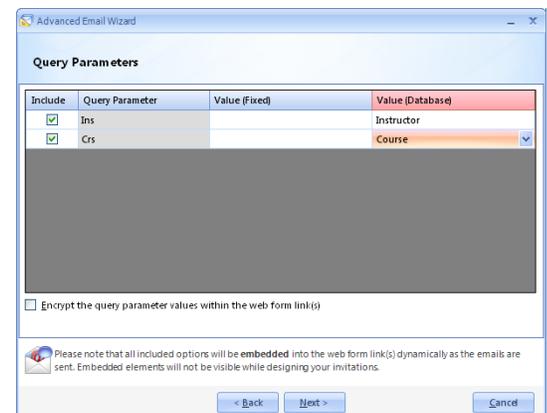
11 If you need to modify the fields listed in the Database Connection window, choose the appropriate values from your external file for **Table, Email field and Password field**.

- Use the **Table name** list to select the table from your database that contains the information you wish to link. You must have a valid email addresses for each recipient to use as the basis of this operation.
- Choose the field containing the email addresses that correspond to your web form recipients under **Email field**. The email address is your link from respondent to Query Parameter value. Each email address in the external database should have a corresponding field that contains the Query Parameter value you want to include. Continuing with our course evaluation example, if each student is going to complete five course evaluations, the email address would be listed five times, each time corresponding to a different instructor/course combination.
- Choose the field containing the respondents' passwords under **Password field**.

12 Click the **Next** button to continue.

13 In the **Query Parameters** window, the table displays the Query Parameters you have defined in the web form. Place a checkmark in the **Include** column for any Query Parameters you wish to include while sending this email.

14 For each Query Parameter listed, go to the **Values (Database)** column and choose the field from your external database that contains the value you wish to insert. In our course evaluation example, you may have fields for instructor and course in your database. You would choose those fields respectively as database Query Parameter values for the Query Parameters you have set up.



15 [Optional] If you want the Query Parameter to be encrypted (masked) mark the **Encrypt the query parameter values within the web form link(s)** checkbox. This option will encrypt the value you insert for each Query Parameter so that respondents cannot decipher it in the web form invitation/reminder URL (web form link).

16 Click the **Next** button to continue.

17 [Optional] **Use the Friendly Web Form Address** option to enter a friendly URL (web form link or address) for the email. Query Parameter values are appended to the web form address. The addresses can get long and a bit cumbersome. Friendly web form addresses are more aesthetically pleasing to the recipient but are optional. When you build friendly web form addresses, you have the option of inserting the Query Parameter values into the address by clicking the down arrow on the **Insert** button. For example, you could use a friendly web form address of `http://www.example.com/courses/` and then insert the course name. This feature provides a way to show recipients the Query Parameter value within the web form address. Note that if you have chosen to encrypt the Query Parameter values in step 15, they will still be encrypted when using a friendly web form address (the base of the address will not



be encrypted; only the Query Parameter values). In addition, the friendly web form address doesn't have to be a link at all; you can type text in this box, such as "Click here to begin your evaluation." When the email is sent, it will be turned into a hyperlink, pointing to your web form's address.

Note: Friendly Web Form Addresses are not saved within email templates. If you wish to use an email template and friendly text, use the **Advanced Email Wizard** first, then apply your email template.

- 18 Click the **Finish** button to launch the email message. At this point you can follow the general instructions for sending emails. The email window is covered in section 9.8 in the main Remark Web Survey 5 User's Guide.

Note: We strongly suggest you take advantage of the new Email Preview feature to ensure you have set up Query Parameters correctly. Using this feature you can cycle through the emails that will be sent, prior to sending, to ensure the web form links have been properly built. The Email Preview feature is covered in section 3.9.

3.8 Creating True HTML Emails

This section is an addendum to section 9.8 in the main Remark Web Survey 5 user's guide.

(*Professional Version Only*)

When sending emails there is an option to **Show Advanced Email Tools** on the toolbar:



When this feature is turned on, three tabs at the bottom of the email will appear:

- **Designer:** The Designer tab shows the original email as created in the Remark Web Survey email client. It allows you to modify the email using the default editor and rich text toolbar options.
- **Code Editor:** The Code Editor tab shows you the HTML code, allowing you to modify it. This option gives you more control over the look of the email. You can insert hyperlinks and other HTML tags to customize the email. This option is intended for advanced users who understand the HTML language.
 - **Note:** Once you modify the HTML Code using the Code Editor, you may not return to the Designer tab to make other changes. If you modify the HTML Code and then return to the Designer tab, you will lose the changes you made in the Code Editor view (you will receive a warning when switching tabs).
- **HTML Preview:** The HTML Preview tab shows you what the email will look like for the respondent. Use this tab in conjunction with the Code Editor to preview your changes.
 - **Note:** This tab is for design purposes only and does not insert real values you may have set up in the Advanced Email Wizard. To preview the real emails that will be sent use the Email Preview discussed in section 3.9.

To use the Advanced Email Tools

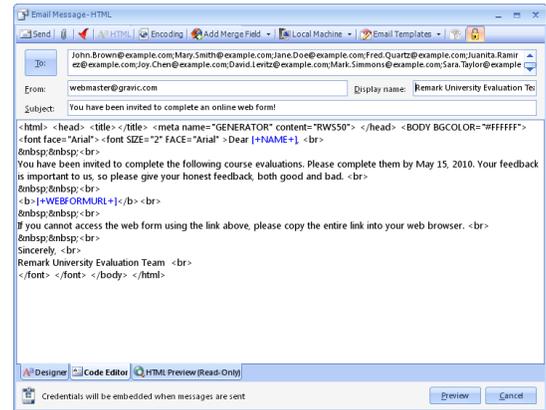
- 1 Within the email client, click the toolbar button for Show Advanced Email Tools: . The Code Editor tab appears at the bottom of the window.
- 2 Click the **Code Editor** tab. Modify the HTML as desired. Note that there is a right click menu that gives you the options of **cut, copy, paste, delete, bold, italic, underline** and **insert hyperlink**.

Note: You may still use Merge Fields when editing the HTML code. Place your cursor where you want to insert the Merge Field and then click the **Merge Field** button on the toolbar.

- Once you have the email designed, click the **HTML Preview** tab to review your email message. If you need to make changes you may move back and forth between the **Code Editor** and **HTML Preview** tabs freely.

Note: Do not click the **Designer** tab. Switching to the Designer view will revert any changes you made in the **Code Editor**. You will receive a warning if you click the **Designer** tab.

- [Optional]. If desired, save the modified email as a template by clicking the down arrow on **Email Templates** and then **Save**.
- When you are ready to send your email, either click **Send** (sends emails immediately) or **Preview** (allows you to view the emails before they are sent).

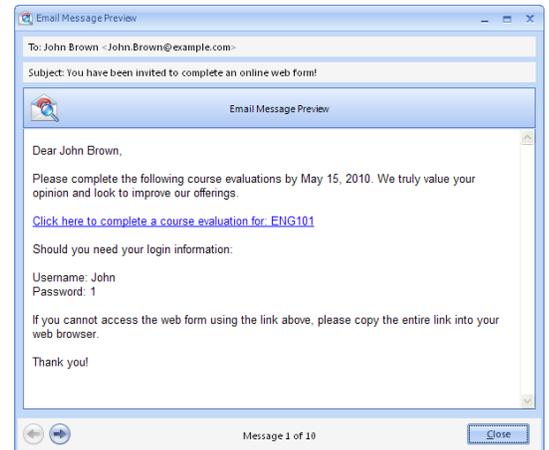


3.9 Email Preview

An email preview option was added to the email client so you can view the emails before they are sent. When using the preview option, you are able to scroll through the real emails, giving you a true representation of what you will be sending. This feature is particularly useful if you are using Merge Fields and Query Parameters. We strongly suggest you use this email preview to ensure your emails look as intended.

To use the email preview option

- Format your email as desired using either the **Advanced Email Wizard** or regular invitation window.
- When you have the email just as you want it, click the **Preview** button in the lower right corner of the window.
- Use the arrow keys in the lower left corner to move forward and backward through the email messages. These are true representations of each email that will be sent based on your "To" list.
- When you are finished previewing, click the **Close** button. The email invitation window will still be open, where you can either make modifications or click the **Send** button to send your email messages.



3.10 Piping Extra Fields of Data Using the Login Page

This section is an addendum to section 5.7.5. in the main Remark Web Survey 5 user's guide.

(*Professional Version Only*)

Using the Database Linking feature, you can pull in extra information from an external database to be sent to your data file and/or piped throughout the web form. This feature works in conjunction with the password question on the Login Page. Previously you could set up database linking on the password question, but you could not utilize that information in answer piping throughout the web form because the database information was not pulled in until the data was downloaded. In version 5.1 and later, once you establish the database link, you can also set a field to be used for answer piping. An initial database lookup is performed at the time the web form is published so that the data will be collected prior to the respondent accessing the web form. This step is necessary so that answer piping can occur. Please keep in mind that this feature is working off of the current copy of the database that is connected at the time the web form is published. If you make changes to

that database after the web form is published, you could end up with discrepancies. When downloading data, database lookup occurs again on all the fields selected to return data to the data set.

For example, suppose you are doing a course evaluation and along with each student's ID you have course or instructor information in an external database. You can use the password field to validate each student and then return the course or instructor from the external file. You could then pipe that information into labels on the form to let students know which course and instructor are being evaluated.

To pipe extra fields using the Login page

- 1 Access the password question's properties and set up database linking as you normally would on any other question on your form. Note that when you first turn on database linking, you will automatically be connected to the same database you used to import passwords, if one was used. You can modify these connection settings as needed without affecting your password list. The following table summarizes the database linking properties:

| Property | Function |
|------------------------------|--|
| Enable database link | Mark the Enable database link checkbox to link a question to an existing database. This feature allows you to add fields to the Remark Web Survey data by outputting information from other field(s) within the database. |
| Database connection settings | Click the Database connection settings link to set up a connection to the database you wish to use. |
| Type | Choose the type of database you wish to use from the Type drop-down list. |
| Browse | Click the Open folder to select the database containing the desired information. |
| DSN | If using an ODBC connection, choose the DSN from the DSN drop-down list. Mark whether it is Directory based or DSN based . |
| Username | If your database requires a login, enter the Username . |
| Password | If your database requires a login, enter the Password . |
| Connection string | Displays the connection string that is working behind the scenes to connect to your selected database. You do not need to edit this string; it is for informational purposes only. |
| Test Connection | You may optionally click the Test Connection button to test whether you can connect to this database. |
| Table name | Use the Table name list to select the table from your database that contains the information you wish to lookup. |

| Property | Function |
|-----------------|--|
| Reference field | Use the Reference field list to select the field in the connected database to which you want to link this question. When the data are downloaded, the respondents' answers will be verified against the values in this database field. If the response is found in the database field, Remark Web Survey will output the Append value(s). If the answer is not found in the database field, Remark Web Survey will leave the Append fields blank. Mark the checkbox for Include field in data if you want to both lookup and output the Reference field. |
| Append fields | Use the Append fields list to select a field in the connected database to return when the Reference field is verified. To look up the value and then replace it with a different database field's information, select the appropriate field(s) in the Append fields list. Place a checkmark in the fields you wish to append to the data. Use the Alias column to provide a field name for Remark Web Survey to use. If desired, mark the checkbox for Respondent ID to include the field's data on select analysis reports. |

- 2 To utilize the new answer piping feature, place a checkbox in the **Pipe** column for any append field that you wish to utilize later in the web form for answer piping.
- 3 Click the **OK** button.
- 4 When you are ready to utilize the information you marked as "Pipe" go to the **Insert answer pipe** section of the label, question or answer where you want to insert answer piping. Choose the item from the list of available questions. Note that anything from the password question appears as *[Question] (Password Question Pipe)* in the list of choices.

3.11 Pipe Information into Other Web Forms and URLs

This section is an addendum to sections 5.3 (label elements), 5.7 (question and answer element properties), and 5.7.5.a (answer piping) in the main Remark Web Survey 5 user's guide.

(*Professional Version Only*)

You can now use an Advanced link next to the hyperlink address box, wherever hyperlinks are supported, to access the **Advanced Hyperlink Builder**. Here you can create hyperlink addresses that include answer pipes. This feature allows you to pipe one form's responses into another (e.g., chain web forms together) or build custom URLs (web form links) using piped information from the form just submitted (with or without using Query Parameters).

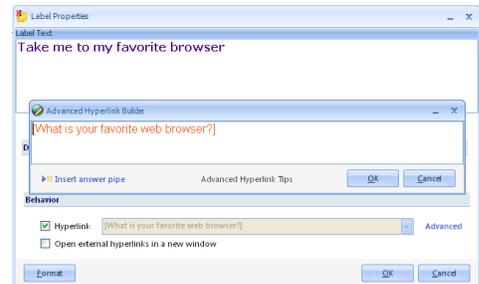
For example, suppose you wanted to have two web forms run in succession. You could use the Advanced Hyperlink Builder to take the answers from one form and, using Query Parameters, launch another form with pre-filled data. Suppose you collect information on a form such as name and address. In the second form you also want to collect that information. However, you don't want to make respondents type the information again. On the second form, you could have Query Parameters set up for this information. Then using the advanced hyperlink options, on the first form's web form complete page, you can set up a hyperlink and insert those Query Parameter values into the URL (web form link). The second form will launch and the name and address information will automatically be passed down to the second form.

Here is another example. Suppose on your form you ask an option button question, "What is your favorite online retailer?" On the web form complete page, you can add a label that says, "Take me to my favorite retailer." In that URL (web form link), you can pipe the

answer they chose as their favorite retailer into the hyperlink so that the website can be launched automatically.

Setting up Advanced Hyperlinks

- 1 Create the label, question or answer in which you want to insert the hyperlink.
- 2 Go to the **Hyperlink** area of that element (accessing hyperlink properties varies based on the element you are using. See your main Remark Web Survey user's guide for general information about adding hyperlinks to elements).
- 3 Mark the checkbox for **Hyperlink**.
- 4 Click the **Advanced** link.
- 5 In the **Advanced Hyperlink Builder** window, build your URL (web form link). Use the **Insert answer pipe** link to insert answer pipes. When building the hyperlink, use the "?" character to append data values. Use the "&" character to separate data values. For example, if you want to launch another Remark Web Survey form using Query Parameters, you would type: `http://www.example.com/cgi-bin/rws5.pl?form=MyForm&Course=English`, where `MyForm` is the name of the web survey and `Course=English` is the Query Parameter name and value. The "?" tells the software that a data values is coming. The "&" tells the software that a Query Parameter is coming next. In our second example from above where we insert a website hyperlink, you would type something similar to: "`http://www.`" and then insert the answer pipe, referencing the question where they chose their favorite online retailer. When the respondent takes the survey, they would see `http://www.favoriteretailer.com`. Note that advanced hyperlinks can only be edited by returning to the **Advanced** window.
- 6 Make sure you test your web form well when using this feature to ensure you have set up the hyperlinks correctly.

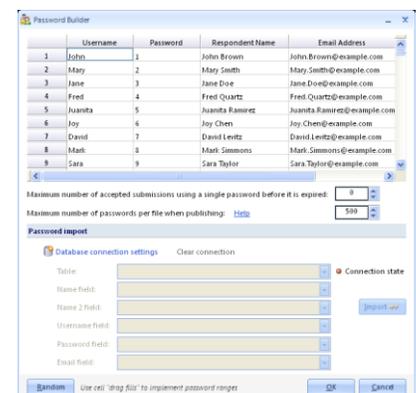


3.12 Password Files

To accommodate large numbers of passwords and/or login page pipes, we have added a feature to publish multiple password files. By placing the passwords in multiple files, your respondents have a faster experience validating passwords and pipes. Remark Web Survey suggests whether you use a higher or lower number than the default number of passwords per file (500) based on the number of passwords and/or pipes you have on the Login page. Please note that server setup may vary from server to server, and even if you are in the recommended range, if you find that the respondent login performance is slow, you can try reducing the maximum number of passwords per file even further. For optimal performance, it is recommended that you keep the number of possible respondents and login page pipe combinations under 3,500. The number of possible combinations is derived by multiplying the # of respondents by the # of login page pipes. If there are no login page pipes, the number of possibilities will be equal to the number of respondents.

To use the password file feature

- 1 From the Login page, enter or import your list of passwords as you normally do.
- 2 [Optional] If you are going to use pipes from the credentials on the Login page, set up the pipes. (See Section 3.10 of this addendum.)
- 3 From the Login page, locate the line for **Maximum number of passwords per file when publishing**. Click



the **Help** link for a suggestion on whether to use a higher or lower number of password files.

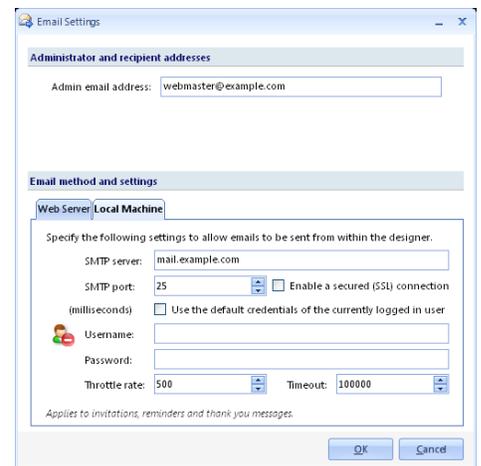
- 4 Once you are within the recommended settings, click the **OK** button to complete the password process (make sure you have completed everything else needed in the Password List Builder, such as setting up each field and clicking Import, if you are importing passwords from an external file).

3.13 Email Timeout

When sending invitation and reminder emails to large numbers of respondents, sometimes, depending on your SMTP server, a timeout can occur. The length of timeout property is available in the email settings section of the Remark Web Survey software and at the web form level. This setting allows you to control how long to keep the SMTP session open. You should use the default setting (300,000 milliseconds) unless you receive a timeout error when sending emails from within Remark Web Survey.

To set the time out at the program level

- 1 Select the Application Button (globe) and then click **Web Survey Options**.
- 2 Click the **Email settings** link.
- 3 Click the **Local Machine** tab.
- 4 Enter the desired email settings as outlined in the main Remark Web Survey user's guide.
- 5 Under **Timeout**, raise the number of milliseconds (300,000 is the default, which is 5 minutes). You can choose values in increments if desired.
- 6 Click the **OK** button to save the values. Any new forms created from this point forward will use this value. If you have existing web forms that need to be adjusted, please continue with the following directions.

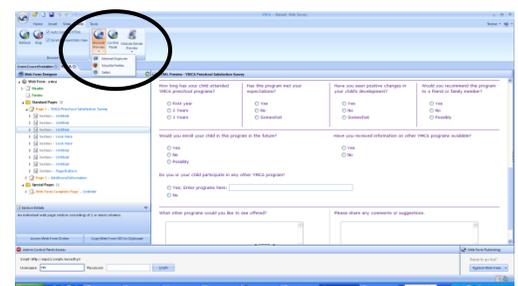


To set the time out at the web form level

- 1 Open the desired web form in the Remark Web Survey software.
- 2 Double click web form level of the tree view, which is the top level containing your web form name.
- 3 Click the **Email settings** link.
- 4 Click the **Local Machine** tab.
- 5 Enter the desired email settings as outlined in the main Remark Web Survey user's guide.
- 6 Under **Timeout**, raise the number of milliseconds (100,000 is the default, which is 100 seconds). You can choose values in increments if desired.
- 7 Click the OK button to save the values. This web form will now use the new timeout value.

3.14 Browser Preview

A **Browser Preview** option is accessible under the **Web** tab on the Ribbon. The software displays a list of web browsers you have installed on your system (Internet Explorer, Firefox, Chrome, Opera and Safari). When you click the **Browser Preview** option, your default browser will open with the currently selected page loaded. If you click the down arrow on the



Browser Preview window, any other web browsers installed on the system are available. You can then instantly see how the web page will appear to respondents in each web browser and make adjustments if necessary. Note that there is no script functionality in the browser preview, so you can only view one page at a time.