Remark Web Survey

User's Guide

Revision 5.4

Improving Society Through Innovation®
17 General Warren Blvd.
Malvern, PA 19355 USA
www.remarksoftware.com

Contents

Chapter 1: Remark Web Survey Overview

Remark Web Survey is a web form design program that allows you to create web forms without needing to know HTML or programming. The software runs on your own PC and web server, giving you complete control over the creation, distribution and collection of data for your web forms.

Using the Remark Web Survey software can be broken down into the following procedures:

- Creating a Remark Web Survey web form from scratch, or converting a Remark Office OMR®/Remark Classic OMR® template into a Remark Web Survey web form.
- Modifying the web form until it meets desired needs.
- Publishing the web form on your web server.
- Collecting the data.
- Analyzing the data in Remark Quick Stats®, or optionally exporting the data to the analysis package of your choice.

Remark Web Survey Components

The Remark Web Survey software has three components: a Designer component, a Server component and Remark Quick Stats, an analysis component. The Designer component is used to create the web forms, while the Server component is a set of CGI scripts and Perl modules used to receive web form responses and administer web forms. This user's guide focuses on the Designer and Server components. Remark Quick Stats is covered in a separate user's guide located in Start|Programs|Remark Web Survey 5|Documentation.

Designer Component Overview

Once the Remark Web Survey Designer component is installed, you may begin creating web forms. You prepare the web forms in the Designer component so that they can be published on your web server. When creating web forms in the Designer component, we refer to the interface as the "design window." The Designer component contains three areas for displaying a web form.

Tree View

The left side of the design window provides a tree view that displays the various parts of a web form in a tree structure (pages, sections, questions, images, lines). These parts of the tree are called elements. It is in this window where form elements are added, deleted and modified.

HTML Display

The right side of the design window displays the web form as it appears in a web browser. As changes are made to the form using the tree view in the design window, the HTML Display updates to show the changes.

Data Viewer

The Data Viewer contains a spreadsheet style grid for displaying the data collected from the web form. You can automatically download data from your web server or open a data file from this window. Remark Web Survey can then analyze the data or you may export it to the analysis package of your choice.

Server Component Overview

A web server is a computer that is used to provide HTML files to a web browser. Remark Web Survey runs on your own web server, which is set up independently. Once a web form is created in the Designer component, the web form is published to the web server with the Gravic-supplied server CGI scripts, which comprise the Server component. The Server component provides a control panel where you can set certain attributes on your web server, such as where to store web forms, as well as view, download or remove data.

Data Collection

The data collected from web forms are saved directly on your web server in a proprietary format (.rwd). This data file can then be downloaded and exported to other formats within Remark Web Survey. The data file contains one row of data for each web form that is submitted. Each time a web form is completed and submitted by a respondent, a row (record) is added to the data file. The data can then be downloaded for the purpose of viewing and analyzing the results. When downloading data, you are given the option to download the entire data set, to download only the new submissions since the last download or to download incomplete submissions. Data on the web server can be deleted at any time in order to begin a new data file.

General Information

For clarification purposes, menu items and names of items taken directly from the software interface are in **bold** throughout the user's guide whenever they are used in an instructional context. In addition, there are tips throughout the guide to assist you in with using the software. These tips are highlighted in gray. We encourage you to perform the tutorial that you can find under the Help icon in the software to get an overview of how the software works and what it can do for you.

What is Included with your Software

Each purchase of Remark Web Survey includes the following:

- One copy of the software via download (or on CD if requested)
- The following user's guides in PDF format, available from the Windows Start menu:
  - Remark Web Survey 5 user's guide
  - Remark Quick Stats user's guide
  - Remark Web Survey 5 Supported File Formats user's guide
- 60 days of free technical support from the date of purchase

Remark Office OMR and Remark Classic OMR

One of Remark Web Survey's unique features is its ability to work in conjunction with Remark Office OMR and Remark Classic OMR. These software packages are forms processing applications that transform information from paper-based forms into data using scanners. Remark Office OMR and Remark Classic OMR recognize filled in optical marks, such as bubbles and checkboxes, as well as barcodes. The software uses template files to obtain information about a form, including the areas of the form to be recognized and the output that should be obtained from that form. The completed forms are then processed with a scanner according to the template file. Data are collected from the forms and displayed in a spreadsheet style grid. Once the data are collected and reviewed for possible exceptions, the data can be exported to a database, survey design or statistical package, or the Remark software can be used to tabulate or grade the results.

The Remark Web Survey software can convert Remark Office OMR and Remark Classic OMR templates into Remark Web Survey forms so that the equivalent paper-based form can be published on a website, allowing you to collect the same data from two sources. After the data have been collected, they can be combined in any Remark product and analyzed. See Appendix A for more detailed information about using multiple Remark products together.

Technical Support

Remark Web Survey includes a user's guide and online help. There is a knowledgebase on the Gravic website where you can find the answers to frequently asked questions. In addition, there is a tutorial available from the Help menu , which we strongly recommend you perform before using the software for your web forms. Most questions can be answered by consulting these reference materials.

If a problem with Remark Web Survey arises that cannot be solved using the materials above, customers may contact Gravic's technical support.

- **Note:** Gravic makes support available only to registered users of the Remark Web Survey software who hold a valid support agreement. If you are past your 60 days of free technical support (starts from date of purchase), and need information about purchasing a support agreement, please visit our website.

Before contacting technical support, please gather the following information:

- The version and serial number of the Remark Web Survey software (you can find this information by opening a web form and then looking at the HTML Display portion of the window while the web form name is selected in the tree, at the bottom of the Remark Web Survey designer window, or in the software's program options, accessed from the Application Button .
- The steps required to reproduce the problem.
- The type of web server on which the scripts are installed, if applicable.
- If the issue is related to the Server component (e.g., the administration of web forms or set up of the Server component), access to the Remark Web Survey Control Panel (rwsad5.pl script) in order to view the diagnostics information provided.

Gravic's technical support team provides product support to customers with valid support agreements via email, phone, website and fax.

Chapter 2: Installing the Software

This chapter provides the necessary instructions for installing Remark Web Survey. The software consists of two components: the Designer component and the Server component. The Designer component runs on Windows XP or later (see below). It is installed on a Windows-based PC and is used to create web forms. The Server component is comprised of Perl scripts/modules and an html folder for collecting data and administering forms, which are installed on the web server. Installing the software involves the following steps (each step is outlined in detail in this chapter):

1. Verify system requirements
2. Install the Designer component
3. Install the Server component scripts
4. Set/verify permissions on the server scripts
5. Set location for configuration files (optional)
6. Test script installation
7. Set up default form directory for storage of web forms
8. Setup user accounts
9. Set up server information in Designer component

System Requirements

Minimum System Requirements- Designer Component

The following section outlines the minimum system configuration for running the Remark Web Survey Designer component. The designer portion of the software can be installed on a Windows-based PC meeting the following requirements.

- Personal Computer with 2 GHz or faster processor
- Windows 32-bit and 64-bit operating systems: Windows 10, 8.1, Windows 7 SP1, Windows Vista SP2 (Note: SP stands for “Service Pack”)
- The Remark Web Survey Designer runs on a Windows Server operating system if you use it like a desktop system, but please note the software is not a client/server application and is not supported in a virtual or server-based environment

- Internet Explorer 8 or later (used for viewing forms as they are created in the Designer component)
- Internet Explorer does not need to be your default web browser; it need only be installed and configured for use on the system
- 2 GB RAM
- 1 GB free fixed disk space
- CD-ROM drive (for installation purposes if purchasing on CD)
- Screen/monitor resolution of 1024x768 or higher and at least 32-bit color
- Mouse or other pointing device
- Internet connection required for automatic form publishing and data downloads
- Microsoft Outlook 2007 or higher if you wish to use the email feature.
- Adobe Acrobat reader to view documentation

Minimum System Requirements- Server Component

The following section outlines the minimum system configuration for running the Remark Web Survey Server component on Windows and Unix/Linux based web servers.

- A Unix, Linux or Windows based web server capable of running Perl CGI scripts.
- Perl 5.12 or later. (See www.perl.com or www.activestate.com for information on obtaining a copy of Perl).
- A qualified website administrator with root/admin access to the web server and an understanding of installing Perl scripts. Because Remark Web Survey runs on your own web server, it is important to have a person knowledgeable about web servers available to install the server component.

Installing the Designer Component

To use Remark Web Survey, you must first install the Designer component on a fixed drive containing a minimum of 1 GB of free disk space. The CD-ROM or download contains the Remark Web Survey installation program.

To fully take advantage of Remark Web Survey's features, you need to have Microsoft Internet Explorer 8 or later installed on your computer. Remark Web Survey utilizes Internet Explorer to provide an HTML Display window as you design web forms. This HTML Display window allows you to view your web form as you are creating it, just as it would appear in a web browser. If you do not currently have Microsoft Internet Explorer 8 or later installed, you need to install this program before installing Remark Web Survey. Note that respondents submitting your web forms are not limited to using Internet Explorer nor does it have to be your default web browser.

To install the Remark Web Survey Designer component

If you downloaded the software:

1. Double click the file you downloaded.
2. Follow the on-screen instructions to display the **Remark Web Survey Installation** window.
   - **Note:** The .NET 2.0 and 3.5 Frameworks are required to install Remark Web Survey. If you do not have them installed on your system, you are prompted to install them. Once the .NET Framework installations complete, the Remark Web Survey installation resumes normally.
3. Follow the on-screen instructions to complete the installation. You are prompted for a serial number and authentication code. You can find this information in the email that you received when you purchased the software.
4. Some operating systems may ask whether you wish to install the software for all users or only the person currently logged into the computer. In most cases, and especially if multiple people use this computer and need to use Remark Web Survey on this computer, you should choose the option for "all users."
5. When the installation completes, click the **Finish** button to close the installation program.

Please retain the download in case you need to reinstall the software in the future. Once the download completes, you may run the software.

If you purchased the software on a CD-ROM:

The Remark Web Survey CD-ROM contains an auto play feature so that when it is inserted into your CD-ROM drive, the installation begins automatically. This feature is only available if your CD-ROM drive's auto play feature is enabled. If the software installation does not automatically start, use the following instructions to install the software.

1. Insert the installation CD-ROM into your CD-ROM drive.
2. Select **Start** on the taskbar and then click **Control Panel**.
   - **Note:** Accessing the control panel may vary slightly based on the version of Windows you are running.
3. Double click **Programs** (or **Add or Remove Programs**, depending on your operating system).
4. Click **Install** and then follow the on-screen instructions to display the **Remark Web Survey Installation** window.
   - **Note:** The .NET 2.0 and 3.5 Frameworks are required to install Remark Web Survey. If you do not have them installed on your system, you are prompted to install them. Once the .NET Framework installations complete, the Remark Web Survey installation resumes normally.
5. Follow the on-screen instructions to complete the installation. You are prompted for a serial number and authentication code. You can find this information on a sticker on the CD case that came with your software.

6. Some operating systems may ask whether you wish to install the software for all users or only the person currently logged into the computer. In most cases, and especially if multiple people use this computer and need to use Remark Web Survey on this computer, you should choose the option for "all users."
7. When the installation completes, click the **Finish** button to close the installation program.

Once the download completes, you may run the software.

Running Remark Web Survey

Use the following procedures to start and exit Remark Web Survey:

To start Remark Web Survey

1. If you chose to install a shortcut on your desktop during installation, double click this shortcut. Otherwise, select **Start** from the taskbar.
2. Highlight **Programs**, highlight **Remark Web Survey 5** and then click R**emark Web Survey 5** again.
    - **Note:** Accessing the installed programs may vary slightly based on the version of Windows you are running.

The **About Remark Web Survey** window displays. This informational window remains for a few seconds while the program loads. When complete, the Welcome window displays.

The first time you run the software, it checks to see that the program options have been updated to include pertinent web server information, including the paths to the Server component scripts and email server. The scripts are necessary to administer web forms. Without this information, you are not able to successfully publish web forms or download data. We strongly recommend entering all of the web server information into the Designer component's program options before beginning to create web forms. You need to obtain this information from the web administrator who installed the Server component.

Installing the Server Component

The following files make up the Remark Web Survey Server component. The script files are written in Perl, which is a popular scripting language for CGI scripts.

Script Name	Function
rwsad5.pl (administration script)	Used to administer web forms, which includes installing forms, downloading data and resetting data. Also known as the Admin Control Panel.
rws5.pl (data collection script)	Used to collect the data each time a web form is submitted.
rwstest5.pl (test script)	Used to provide diagnostic information about the web server running Remark Web Survey.
rwsimg5.pl (image script)	Used to serve the web form’s images onto the HTML pages.
rwsutils5.pm (utilities script)	Contains the functions that the rwsad5.pl and rws5.pl scripts use.
rwsem5.pm (encryption script)	Used for encryption of passwords on password protected forms.
rwsxml5.pm (XML parser)	Used for parsing information.
rwsdir5.cfg	Used to change the default location of script configuration files that are stored on the web server.
html	Folder that resides on the web server and contains supporting HTML files for the Control Panel.

- **Warning:** The rwstest5.pl script is only used for diagnostic purposes. It should not be installed permanently on your web server, as this poses a security risk should someone unintended be able to access it. Only install the rwstest5.pl script when troubleshooting the Server component or working with Gravic support to resolve support issues. Remove the file from your web server once the issues are resolved.

During the installation of the Designer component, the Server component scripts are installed to a Scripts folder in the Remark Web Survey installation folder (e.g., C:\Program Files (x86)\Gravic\Remark Web Survey 5\Scripts). Your website administrator needs access to these scripts in order to install them to the web server. Because each web server is different, *it is very important that someone with knowledge of your web server installs the Server component scripts on the web server.*

Installing the scripts involves uploading them to your web server’s CGI directory. A CGI directory is a standard directory on a web server that holds scripts. Scripts are used to execute commands on the web server. In the case of Remark Web Survey, scripts are used to administer web forms and collect data from those same forms. Common names for CGI directories are cgi-bin, cgi-local and scripts. However, you are not limited to these naming conventions. The CGI directory should always be in a secure location on your web server that is not publicly accessible.

Before installing the Remark Web Survey scripts on your web server, you need to install the Perl scripting language version 5.12 or later. We recommend installing the latest stable version of Perl (you often find a stable release version and a beta version). Note that Perl is a free download from www.perl.com or www.activestate.com. When installing Perl, install the entire package, including optional modules.

Once you have set up the CGI directory on your website and installed Perl, you may continue with the installation of the scripts.

The directions provided in this user's guide apply to in-house web servers as well as hosted solutions. If you use an Internet Service Provider (ISP) to host your website, they must have Perl installed and configured, as indicated in our minimum system requirements, and you must have a CGI directory for placement of the Remark Web Survey scripts. You need to upload the scripts to your CGI directory. You may need to get your hosting company involved in order to set up the scripts properly for your web server's configuration.

- **Tip:** It is recommended that you perform all of the installation steps before users begin creating web forms.
- **Important Note:** Web servers can be configured in different ways, and IIS and Linux/Unix change periodically. These instructions are current as of the time of the writing of this user's guide. Please note that specifications may change over time. The instructions below should be used as a guideline, keeping in mind that your setup may vary slightly.

Upgrading from Previous Versions of Remark Web Survey

If you are upgrading from a previous version of Remark Web Survey, you may put the scripts in a new folder or in the folder with the existing scripts. The benefit of using the existing folder is that you know the proper permissions are set. If you use the same folder as previous versions, use caution when placing the scripts. Do not overwrite any existing scripts. You may need to migrate web forms over to the new version over time. Do not remove old scripts until you have completely migrated over all web forms to the new version.

In addition, Remark Web Survey 4 and 5 use an HTML subfolder, which contains files used by the Remark Web Survey Control Panel. The HTML folder must reside in the same directory as the scripts. The HTML folders for the two versions should be separate. When Remark Web Survey 5 is installed, the scripts unpack to the scripts folder of the installation directory (e.g., C:\Program Files (x86)\Gravic\Remark Web Survey 5\Scripts) using the recommended format for the web server: html\5. We suggest maintaining the html\5 folder structure on the web server within the scripts/CGI directory to keep the two sets of HTML files separate.

- **Special Note:** If you are already running version 5.0 or 5.1 and need to install the latest version, you *must* update the server scripts as well. You cannot use a newer designer with older scripts. You need to coordinate the Designer and Server installs so that the products are in sync. You must also republish any active forms once the updated scripts are installed.

Installing the Scripts on Windows Based Web Servers (IIS)

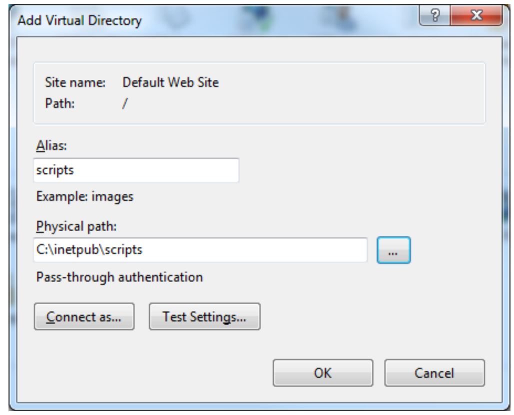
IIS comes in different versions that have slight nuances. The basic instructions are provided below. To install the scripts on Internet Information Services, you need to first upload the scripts to the web server and then set up appropriate permissions so that the scripts execute correctly. These steps vary slightly depending on your version of IIS and are detailed in the following sections.

To install the scripts on the web server

Create the Web Server Scripts Folder

1. Create a folder to hold the Remark Web Survey scripts in the C:\Inetpub folder on the web server. This folder is typically called scripts. Move or copy the Remark Web Survey scripts from the Remark Web Survey Designer component installation folder (C:\Program Files (x86)\Gravic\Remark Web Survey 5\Scripts) into the C:\Inetpub\scripts folder.
2. Once this step is finished right click your scripts folder and click **Properties**.
3. On the **Scripts Properties** window select the **Security** Tab. Click the **Edit** button.
4. This opens the **Permission for Scripts** window (where Scripts is the name of the folder that holds your scripts). Click the **Add** button.
5. The **Select Users, Computers, Service Accounts, or Groups** window appears. You need to add the IUSR account to the list of Group/User names so that you can apply permissions correctly.
6. Change the **'From this location'** text box from the name of your domain to the name of your computer. Click the **Locations** button. Select your computer name. Click **OK**.
7. Type **IUSR** into the large text area box. (This is under the text that says: **Enter the object names to select (examples)**).
8. Then click the **Check Names** button. IUSR becomes underlined. Click **OK**.
9. 9. After you click OK, IUSR is an option in the Group or user names list. Click **IUSR** and then click the **Edit** button. This opens the **Permissions for Scripts** window. Give the IUSR all but full control. Click **Apply**, and **OK**.

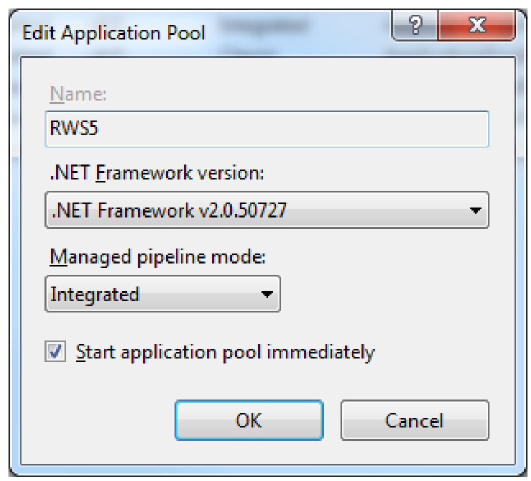
Create the Virtual Directory in IIS



1. Close the properties, and load IIS from the Administrative Tools: **Start Button| Control Panel | Administrative Tools**. Select **Internet Information Services (IIS) Manager** from the window that opens.
2. Your first step is to create a Virtual Directory. In doing so you resolve the physical location of your Remark Web Survey Perl scripts (C:\InetPub\scripts) to a link you can browse to in a browser. Right click the **Default Web Site**, and select **Add New Virtual Directory**.
3. The **Add Virtual Directory** window appears. Type in scripts, or whatever you want to call the directory (this is typically the same name as the physical folder you created to house the scripts).
4. Select the location of your scripts folder. (C:\inetpub\scripts or wherever they reside.)
5. Click the ellipses (...) to select the path. Click **OK**. You now have created the Virtual Directory.

Create the Application Pool

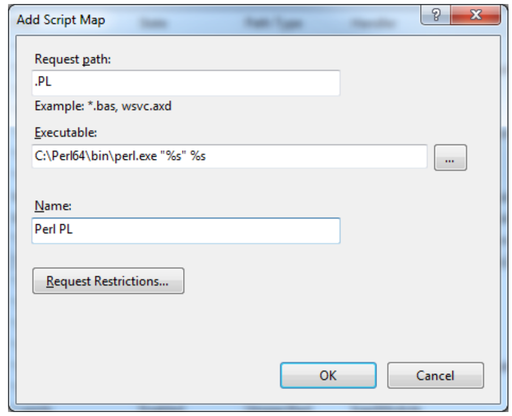
1. Right click Application Pools, and then select Add Application Pool.
2. Enter **RWS5 Scripts** for the **Name** and leave the rest of the default options. Click OK.
3. Next you need to set this application pool as the default for the website. Look all the way to the right under **Browse Web Site** and click **Advanced Settings**.
4. In **Advanced settings** the first option is **Application Pool**. Click where it says **RWS5 Scripts** in bold. It opens a small window with a drop down; select the **RWS5 Scripts** (or name of Application Pool that you just created)
5. Click **OK**, and then **OK** again.



Add the Perl CGI Extensions

The final Step is adding Perl CGI Extensions. Note: Perl needs to be installed on the Web Server for this to work. Perl can be downloaded from www.perl.com or www.activestate.com.

1. Double click the **Handler Mapping** icon in IIS.
2. Look to the far right side of this window and click **Add Script Map**.
3. You need to add .PL and .CGI. You then add the "%s" %s to the end of the path by typing it in after you choose the location of perl.exe. Perl is typically installed in C:\Perl or C:\Perl64.
4. Click the **Request Restrictions** button and click the **Verbs** tab in the window that opens. Select **'One of the following Verbs**:' option button and type GET,HEAD,POST.



5. Click **OK**, and **Save changes** if you are prompted. You should now be able to access the Remark Web Survey Admin Control Panel.

Test Your Setup

1. Browse out to the following in your web browser.

http://nameofserver/scripts/rwsad5.pl

The administrative script should appear, asking you to change your password. The default password is rws, which you should immediately change to the password of your choosing.

If the administrative script does not appear, revisit the previous steps to ensure everything was set up correctly. If you cannot resolve the issue and have a support contract with Gravic, you can email us with the URL of your test script and we will assist with troubleshooting. After completing these steps, you should be able to run the Remark Web Survey scripts.

Installing the Scripts on Unix/Linux Based Web Servers

To install the scripts on Unix/Linux web servers, you must have root admin rights to the server. First upload the scripts and then set the appropriate permissions.

1. Open the rwsad5.pl, rws5.pl and rwsimg5.pl scripts in a text editor such as Notepad (one at a time).
2. If the location of the Perl compiler on your web server differs from the default location pre-entered in the scripts, modify the first line of each script to point to the location of the Perl compiler on your web server (e.g., #!/usr/bin/perl).
3. Save and close the scripts. Do not change the file extension from .pl when saving the files.
    - **Note:** You may change the Perl scripts to a .cgi extension if your web server associates this extension with Perl instead of .pl. However, do not change any other part of the script name.
4. Upload the scripts and Perl modules (rwsad5.pl, rws5.pl, rwsimg5.pl, rwsem5.pm, rwsxml5.pm and rwsutils5.pm), and the html folder to the CGI directory on your web server in ASCII format (not binary). Or place the files on the web server if you have access to it internally.

- **Note:** The logo.png file in the html folder should be uploaded in Binary format if using an FTP program.
- **Note:** The config directory, which is controlled by the rwsdir5.cfg file, must have permission to create and delete files. This topic is covered in detail in the next section.

5. Set the appropriate file permissions for the scripts. The scripts require read, write and execute permissions by the file owner, and read and execute permissions for both the group and world levels. Often you can set these permissions using an FTP program, or you can set them through the Unix "chmod" command (e.g., "chmod 0755 rwsad5.pl rws5.pl rwsimg5.pl").
6. Set the appropriate user for the scripts. The scripts should be owned by the same username set up to execute scripts on your web server. In common setups, this is already the case, but it may be necessary to use the Unix "chown" command to change the file ownership (e.g., "chown userid rwsad5.pl rws5.pl rwsimg5.pl").
7. Set the appropriate group for the scripts. The scripts group should be the same group name set up to execute scripts on your web server. In common setups, this is already the case, but it may be necessary to use the Unix "chgrp" command to change the file's group (e.g., "chgrp groupid rwsad5.pl rws5.pl rwsimg5.pl").
    - **Note:** It is the website administrator's responsibility to secure the directory in which the Server component scripts are installed against unwanted access.

Configuration Files

The Remark Web Survey scripts store information in separate configuration files in order to ensure proper security. The rwsad5.pl script (administration script) writes information to a file called rwsad5.cfg. This file contains stored information about your admin defaults and each installed web form. In addition, the user information is stored in two files called rws5.cfg and rwsem5.cfg. These configuration files are stored in the CGI directory of your website by default. However, we recommend changing this location for maximum security. Keep in mind that the new config directory should be a non-public directory. Note that when you select a directory to use for the storage of config files, the scripts must have permission to create and delete files as well as read and write access to this directory.

The location of the configuration files is stored in a file called rwsdir5.cfg. It is best to modify the configuration file that is located in the local Remark Web Survey installation directory and then upload it to your web server.

- **Tip:** If you forget the password for the Administrator account, you can delete the rwsem5.cfg file from the scripts directory. This restores the Remark Web Survey Control Panel to its original installation state, allowing you to set up a new password for the Administrator account. Use the default password of **rws** when prompted to select a password for the Administrator account.

To modify the location of the configuration files (optional)

1. Locate the rwsdir5.cfg configuration file in the Scripts folder of your Remark Web Survey Designer software installation directory (e.g., C:\Program Files\Gravic\Remark Web Survey 5\Scripts).
2. Open the rwsdir5.cfg file in a text editor such as Notepad.

3. Enter the location of the directory in which you would like the configuration files stored. Be sure to include the trailing slash (e.g., C:\Inetpub\config\ or /web/www/config/).
4. Save the file. When saving the file, be sure to maintain its .cfg extension.
5. Upload or place the modified file in the CGI directory of your web server (the same directory in which the scripts are installed).

The rwsad5.cfg and rws5.cfg files are now created in the new directory.

Verifying the Script Installation

Once the scripts are installed on the server, you should test them to make sure they are working properly.

1. Open a web browser and enter the location of the administration script as the address (e.g., http://www.example.com/cgi-bin/rwsad5.pl). This is the Remark Web Survey Control Panel.
2. The Remark Web Survey **Remark Web Survey 5 Control Panel Setup** window appears. You use this window to set up the password for the default user, **Administrator**. Enter the default password in the **Password** box: **rws**.
3. Choose a new password and enter it in the **New Password** box.
4. Re-enter the new password in the **Confirm Password** box for confirmation.
5. Click the **Change** button to change the password.
6. You receive a message that the password was successfully changed, indicating that the administration script is functioning properly. Click the **OK** button to return to the login screen and then login with your new administrator account. The initial login is for the “administrator.” You can also create other access accounts. For the purposes of verifying script information, login with the user name “Administrator” and the password you set in Step 3 above.

If you receive any other messages, the scripts are not installed properly. Please verify that you have set the proper permissions for the scripts and the CGI directory. Ensure that the scripts were uploaded to the web server in ASCII format and that you inserted the path to the Perl compiler in the first line of each script (for Unix/Linux servers only). See the next section for more information about using Remark Web Survey’s diagnostic test script for troubleshooting.

Remark Web Survey Diagnostics

If you encounter problems when installing/running the Remark Web Survey Server scripts, you can run the diagnostics in the Remark Web Survey Control Panel and/or the diagnostic test script called rwstest5.pl. These diagnostics provide pertinent information about your web server setup, the Perl installation and the script information.

To run the Control Panel diagnostics

1. Open the Remark Web Survey Control Panel in a web browser (rwsad5.pl) by entering its URL in the address bar of the browser.
2. Log in using the Administrator account (or another account with administrator privileges).
3. Select the **Diagnostics** tab.
4. Review the information provided about the scripts in the first section. Any errors/problems found are highlighted for you. You can also test email functionality using the SMTP test area toward the bottom of the script. If you need assistance interpreting the information provided, we recommend you contact Gravic support, providing the URL to your rwsad5.pl script along with a login so we can review the results.

To run the Remark Web Survey test script

1. Open the Remark Web Survey Control Panel in a web browser (rwsad5.pl) by entering its URL in the address bar of the browser.
2. Log in using the Administrator account (or another account with administrator privileges).
3. Select the **Diagnostics** tab.
4. Scroll to the bottom and click the button titled **Access Test Script**.
5. If Perl is installed and configured correctly, the script should execute and display a wealth of information about your web server and the Remark Web Survey scripts. Go to the end of the script to locate the **Problem Report**. In addition, any problem areas are highlighted in red throughout the script.
   - **Tip:** An alternate way to run the test script is after installing the Remark Web Survey Server component, enter the URL to the rwstest5.pl script in a web browser (e.g., http://www.example.com/cgi-bin/rwstest5.pl). The test script (rwstest5.pl) must be installed with the other scripts in your CGI directory to perform this troubleshooting.
   - **Note:** If you need to contact the Gravic technical support group to troubleshoot Server component issues, please have the Remark Web Survey test script installed and be prepared to provide the URL to support personnel if it is publicly available, or alternatively the test script output if the URL is not publicly available.

Changing the Script Names

Some web servers require scripts to have a CGI extension (.cgi) instead of Perl's standard .pl extension. If this is a requirement of your web server, rename the scripts with a .cgi extension before posting them to your web server. Do not change any portion of the name prior to the .pl extension.

- **Caution:** Do not change any files that have .pm extensions.

Setting Up the Default Form Directory

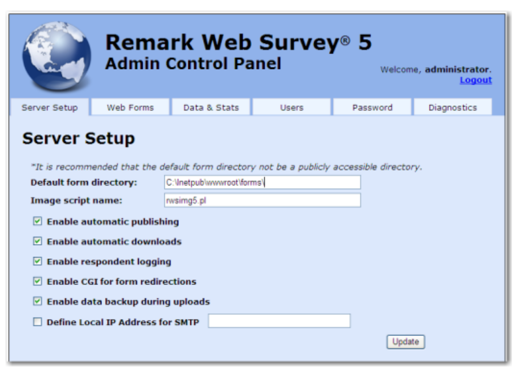
Every time a web form is published to the web server, a folder is placed in the **Default form directory**. This folder contains the HTML, images, multimedia files, passwords, data, log and configuration files for the web form. The benefit to this approach is that each web form has its own folder for storage of all files related to that web form. For example, if the default form directory is C:\Inetpub\forms, each time a web form is published, a new folder is created in the C:\Inetpub\forms folder. In this example, if a web form is called "satisfaction_survey" a folder called satisfaction_survey is created in the forms folder. The satisfaction_survey folder contains the HTML pages of the web form, any related image files, multimedia files, password information, configuration file, the data and log files and, as the form is submitted, the unique IDs of each respondent.

You should set up the default form directory before beginning to create and administer web forms. Note that the data (rws5.pl) script needs to be able to write data to this directory each time a form is submitted. Therefore, the default form directory should be set up with permissions that allow the data script to read, create, write and delete information. (Note: For IIS, the data script typically runs under the Internet Guest Account or IUSR)

- **Caution:** The **Default form directory** should be a non-public directory for optimum security. The Remark Web Survey scripts must be able to read and write information to and from this directory. If you do not set up a Default form directory, the CGI directory is used instead.

To set up the Default form directory

1. Log in to the Remark Web Survey Control Panel (rwsad5.pl) using a web browser and an account with administrator privileges.
2. In the **Server Setup** window, in the box titled **Default form directory**, enter the path of the folder where you would like all web forms to be published. You have full control over the path you choose. It can be any location on your web server as long as the Remark Web Survey scripts can read, write, modify and delete files in this folder.
3. Click the **Update** button to save the new **Default form directory**.



The web server is now ready to begin accepting published web forms.

Configuring User Accounts

Remark Web Survey 5 allows you to set up three different Server component account types:

- Administrator: This account has full control over the Server component (can change settings, publish forms, download data, view logs, view statistics, edit users, etc.). The default account is the Administrator account and there can only be one account named Administrator. You may, however, create different user accounts with administrator privileges.
- Standard User: This account only allows the user to view Remark Live Stats and web form data when they login to the Remark Web Survey Control Panel (rwsad5.pl script). In addition you can choose whether to allow automatic form publishing and data downloading from the Designer component for this account. If automatic form publishing and data downloading are enabled, they can use these features for any web form within the Designer component. In addition, if automatic data downloading is enabled, the user is able to download data from the Control Panel.
- Restricted User: This account only allows the user to view Remark Live Stats information and web form data for specific forms when they login to the Remark Web Survey Control Panel (rwsad5.pl script). In addition you can choose whether to allow automatic form publishing and data downloading from the Designer component for the specified forms for this account. If automatic form publishing is enabled, the user can publish any web form from the Designer component. If automatic data downloading is enabled, the user can only download data from the Designer component for the forms specified in their user account. The user can also download data from the Control Panel for the specified forms. Note that after a new web form is published, an administrator needs to add that web form to the list of available web forms for the restricted user.

To set up a new user

1. Log in to the Remark Web Survey Control Panel (rwsad5.pl) using a web browser and an administrator account.
2. Select the **Users** tab.
3. Click the **Add User** button.
4. Enter the desired **Username** and **Password** for the new user.
5. Determine the level of permissions you want to grant to the user (see description above): **Administrator**, **Standard User**, **Restricted User**.
6. Once you choose a permission level, determine whether you want the user to be able to automatically publish web forms and download data from the Designer component. Mark the **Allow automatic publishing from the Designer component** and/or **Allow automatic data downloading from the**

Designer component checkboxes to grant this permission. If users do not have these permissions, they have to rely on another user to publish web forms and download data.

7. Click the **OK** button to add the new user.
    - **Note:** Once users are added their username becomes lower case text when you view it in the Control Panel. This is to create compatibility with both Windows and Unix/Linux web servers. When users login, the username is not case sensitive. However, the password is case sensitive.

To edit a user

1. Log in to the Remark Web Survey Control Panel (rwsad5.pl) using a web browser and an administrator account.
2. Select the **Users** tab.
3. Select a user from the **Users** drop-down list.
4. Click the **Edit User** button.
5. [Optional] If you wish to change the user's password, mark the checkbox for **Change Password**. Then enter a new password in the **New Password** box.
6. [Optional] If you wish to change the user's level of permissions, select the appropriate level: (see description above): **Administrator**, **Standard User, Restricted User**.
7. [Optional] If you wish to change the user's permissions for publishing web forms and downloading data from the Designer component, check or uncheck the **Allow automatic publishing from the Designer component** and/or **Allow automatic data downloading from the Designer component** checkboxes. If users do not have these permissions, they have to rely on another user to publish web forms and download data.
8. Click the **OK** button to save the changes.

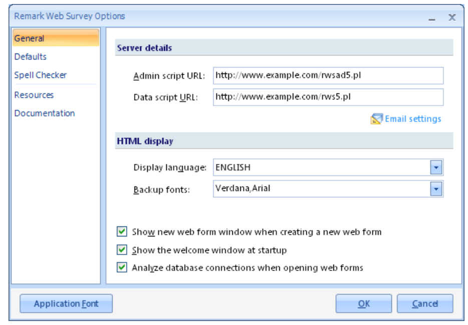
Setting up Server Information in the Designer Component

Once the Server component is functional, you should enter the Admin and Data Script URLs in the program options of the Remark Web Survey Designer component. Once these URLs are entered, any new web forms that are created automatically include the proper URLs for form administration. This ensures proper form publishing and data downloading. If you plan to use the email functionality of the software, it is also recommended that you set up the email server settings in the Designer component.

- **Note:** If this information is not entered into the Designer component, the first time the software is run, you are prompted to enter the information. Please obtain the relevant information from your website administrator (or the person who installed the scripts).

To enter the script URLs in the Designer Component

1. In the Remark Web Survey Designer component, select the **Application Button**  and then click the **Web Survey Options** button.
2. Under **Server details**, enter the **Admin script URL** and the **Data script URL**. Both URLs must be fully qualified URLs. A fully qualified URL includes the http:// or https:// syntax (e.g., http://www.example.com/cgi-bin/rwsad5.pl).



To set up email settings in the Designer Component

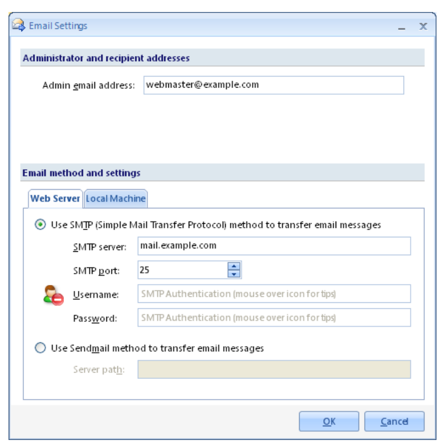
In Remark Web Survey, emails can be used for three different functions: 1) the built-in email client that is used to send web form invitations and reminders, 2) submission notification emails that are sent every time a web form is completed by a respondent, or 3) session pause page reminders to resume a web form once it is started and stopped. You can use an SMTP server or a Sendmail server to send emails from Remark Web Survey. These two types of setup are simply different methods of sending email.

- **Note:** The built-in email client for sending invitations and reminders only works with an SMTP mail server.

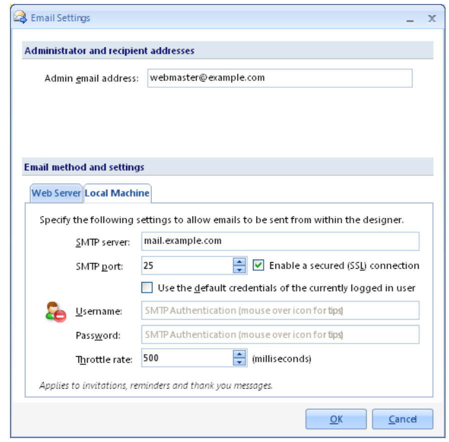
If your web server is configured to use a local Sendmail server, Remark Web Survey can utilize the Sendmail server for sending submission emails or for sending session pause page email reminders to respondents who have paused a form in progress.

Setting up and configuring email servers is independent of Remark Web Survey. Once you have determined the type of email method to use and verified your server is working, you can configure Remark Web Survey to use it.

3. Continuing from Step 2 above, click the link titled **Email settings**.
4. Enter the **Admin email address**. This email address is often the webmaster of the website, but can be any email address of your choosing.
5. Under **Email method and settings**, first select the **Web Server** tab. The Web Server settings are used to set up email transfers that originate on the web server, such as pause page reminder emails and respondent submission emails.
6. Choose the type of email configuration you are using: **SMTP server** or **Sendmail**.
7. If using SMTP, enter the **SMTP server** and the **SMTP port**. The SMTP port is usually 25 but may vary with your email server. If authentication is required, enter the **Username** and **Password**.
8. If using Sendmail, enter the **Server path** (e.g., /usr/sbin/sendmail).



9. Next, configure the local email settings. Under **Email method and settings**, select the **Local Machine** tab. The Local Machine settings are used to set up email transfers that originate from the Remark Web Survey software, such as email invitations and reminders. Sendmail is not available for Local Machine settings.



10. Enter the **SMTP server** and the **SMTP port**. The SMTP port is usually 25 but may vary with your email server.
11. [Optional] If desired, use a secure connection by marking the checkbox for **Enable a secured (SSL) connection**. SSL encrypts data as it is transmitted. Your SMTP server must be configured to use SSL in order for this feature to work.
12. [Optional] If you need to use authentication, you can enter credentials or use those of the user. Mark the **Use the default credentials of the currently logged in user** checkbox to utilize the user's credentials (e.g., the person logged in when sending the emails from the Remark Web Survey Designer component). Otherwise, continue to the next step to enter specific credentials.
13. [Optional] If authentication is required, enter the **Username** and **Password**.
14. Select the **Throttle rate**. The throttle rate adds a delay while sending emails. The default setting is 500ms, meaning that one email is sent every 500 ms (in other words, two emails are sent per second). Throttling emails keeps the SMTP server from being overloaded when sending large numbers of emails.
15. Click the **OK** button to save the options.

Email Server Authentication

Remark Web Survey can interact with email servers that have authentication policies. The following information explains the various types of authentication supported in Remark Web Survey and the requirements needed.

- **Important Note:** Any of these types of authentication only work with mail servers set up properly to support them. You must set up an SMTP server to accept the desired authentication before that authentication works with it. Setting up email servers and authentication is outside the realm of Remark Web Survey and is not supported by Gravic personnel.

CRAM-MD5

CRAM-MD5 authentication is an authentication algorithm using a challenge-based MD5 encryption. The mail server issues a ticket when contacted, and the relay uses the ticket to encrypt the password using an MD5 encryption. Then the relay encodes the username and encrypted password into a base64 hexadecimal format.

This form of authentication requires the Digest:MD5 Perl module and the MIME:Base64 Perl module, both standard in Perl 5.8 and later.

Login

Login authentication is an authentication algorithm that uses base64 encoding. The mail server prompts for both the username and the password, and they are sent to the server encoded in a base64 hexadecimal format.

This form of authentication requires the MIME:Base64 Perl module, standard in Perl 5.8 and later.

Plain

Plain authentication is also an authentication algorithm that uses base64 encoding. The username and password are combined and encoded in a base64 hexadecimal format and then are sent to the mail server.

This form of authentication requires the MIME:Base64 Perl module, standard in Perl 5.8 and later.

Uninstalling the Software

If you need to uninstall the software for any reason, use the Windows Control Panel| Programs function.

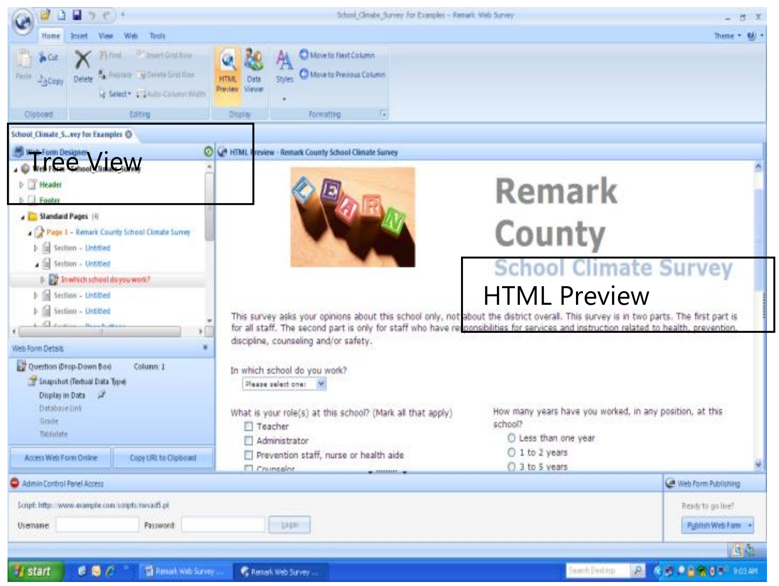
To uninstall Remark Web Survey

1. Select the **Start** menu, click **Settings** and then click **Control Panel**.
    - **Note:** Accessing the control panel may vary slightly based on the version of Windows you are running.
2. Select the **Programs** option.
3. Select **Remark Web Survey 5** from the list and then click **Remove** or **Uninstall**.
4. Follow the on-screen instructions to complete the software removal.
    - **Note:** When uninstalling the software, all program and default files are removed. Files that you have created remain on the system. However, it is recommended that you backup any forms, data files, reports, etc., that you wish to keep prior to uninstalling the software.

If you wish to uninstall the Server component, you may manually remove the scripts and forms from the web server. Note that once web form files are removed from the server, they are permanently removed.

Chapter 3: Navigating Remark Web Survey

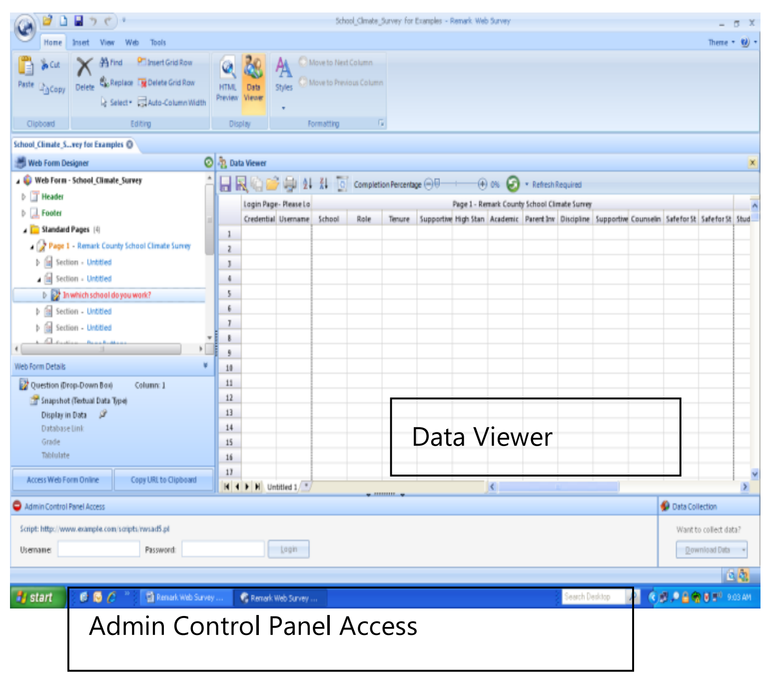
Understanding Remark Web Survey Windows



The Remark Web Survey Designer component interface consists of a split window with a tree view on the left side and an HTML Preview on the right side. The tree view displays the elements of the web form and is used to make modifications to the web form. The HTML Preview window displays the form as it appears in a web browser.

The HTML Preview panel can be toggled with a Data Viewer panel. The Data Viewer panel displays a spreadsheet style grid used to view and analyze the collected data. This chapter covers the tree view and HTML Preview windows; the Data Viewer tab is covered in Chapter 10: Collecting Data.

The bottom of the window displays the Admin Control Panel Access bar. This area is used to login to the administration script (rwsad5.pl) in order to publish web forms and download data.



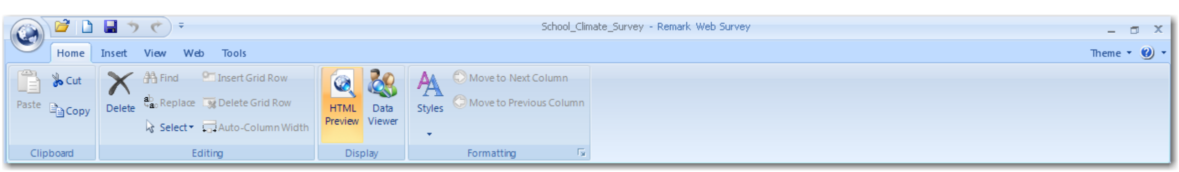
Using the Application Button

The Application Button is the round button in the uppermost left hand corner of the Remark Web Survey designer: . It contains the Application Menu, which consists of commonly used functions in the software. The following functions are available by clicking the Application Button:

Function	Description
New	Starts a new web form. You may have multiple web forms open at one time.
Open	Opens an existing web form or data, depending on whether you are currently viewing the HTML Preview or Data Viewer window.
Save	Saves the active web form or data, depending on whether you are currently viewing the HTML Preview or Data Viewer window. If the file already exists, it is automatically overwritten with what you see on the screen.
Save As	Saves the active web form or data, depending on whether you are currently viewing the HTML Preview or Data Viewer window, by opening a Save dialog. You may choose a file name and a location in which to save the file.
Print	Prints the active web form.
Publish	Uploads the active web form to the web server.
Download	Downloads the active web form's data from the web server.
Close	Closes the active web form or data, depending on whether you are currently viewing the HTML Preview or Data Viewer window.

Using the Ribbon

The Ribbon is the bar across the top of the Remark Web Survey designer that contains menu options. The Ribbon is segmented into tabs, where controls are grouped together based on functionality. Click the tab at the top of the Ribbon to access related functions.



You can minimize and maximize the Ribbon by right clicking within it and then choosing the appropriate item. When the Ribbon is maximized (the default), meaning you can see all of the icons, choose **Minimize the Ribbon** to hide it. When the Ribbon is minimized, you only see the icons when you click a menu item. The icons minimize again when you perform another action. When the Ribbon is minimized, first click a menu item to expand the ribbon temporarily. Then right click within the Ribbon and select **Maximize the Ribbon**.

The following Ribbon options are available:

- **Note:** The following tables contain brief descriptions of each item as it relates to the Ribbon. Full feature descriptions are found in subsequent chapters of this user's guide.

Tab	Group	Function	Description
Home	Clipboard	Paste	Pastes the contents of the Windows clipboard after the current selection.
		Cut	Cuts the current selection to the Windows clipboard.
		Copy	Copies the current selection to the Windows clipboard.
	Editing	Delete	Deletes the selected item.
		Find	Searches the active web form's data for a word or phrase.
		Replace	Searches the active web form's data for a word or phrase and then replaces it with another word or phrase.
		Select	Selects the active item.
		Insert Grid Row	Inserts a new grid row in the Data Viewer.
		Delete Grid Row	Deletes the selected grid row(s) in the Data Viewer.
		Auto Column Width	Resizes the columns in the Data Viewer so that they fit the text within the cells. This feature allows for better readability of the text within the data cells.
	Show	HTML Preview	Displays the HTML Preview section of the window. The HTML Preview displays the web form as it appears in a web browser.
		Data Viewer	Displays the Data Viewer section of the window. The Data Viewer grid displays opened or downloaded data for each web form.

Tab	Group	Function	Description
	Formatting	Styles	Applies a style sheet to the active web form. Click the main style sheet button to apply the last selected style sheet. If you have multiple style sheets designed, click the down arrow on the style sheet button to choose from a list of style sheets. To create a new style sheet, click the Dialog Box Launcher in the right bottom corner of the Formatting section of the Ribbon to open the Style Sheet Editor. The dialog box launcher looks like this:  .
		Move to Next Column	Moves the selected item one column to the right. The section must have multiple columns for this feature to take effect. This is a shortcut for moving elements from column to column.
		Move to Previous Column	Moves the selected item one column to the left. The section must have multiple columns for this feature to take effect. This is a shortcut for moving elements from column to column.
Insert	Divisions	Page	Inserts a new page on a web form. Use the drop-down arrow to select a page type. If you do not click the arrow, a Standard page is inserted. The page is inserted at the bottom of the expanded node in the tree view.
		Section	Inserts a section on a web form. The section is inserted at the bottom of the expanded node in the tree view. Sections hold all of the other elements on the web form (questions, answers, labels, buttons, multimedia, lines and images).
	Visuals	Label	Inserts a label on the web form. A label is used to display user-created text.

Tab	Group	Function	Description
		Horizontal Line	Inserts a horizontal line on the web form.
		Image	Inserts an image on the web form. Images can be in the JPG, GIF or PNG formats.
		Multimedia	Inserts video and audio files on the web form. Supported formats include: MPG, MPEG, AVI, WMV, MOV, WAV, MP3, RAM, RM.
	Interaction	Question	Inserts a question on the web form. Question types include Textbox/Text Area, Checkbox (for multiple responses), Option Button (for single response questions) and Drop-Down Box (for multiple or single response questions). Click the down arrow on the Question button to insert a Question Table. Question Tables group like questions together in table format.
		Answer	Inserts an Answer choice on the web form.
		Button	Inserts a button on the web form. Buttons can be text or image based. The button types are: Submit/Next, Back, Reset and Session Pause.

Note: Holding down the **Shift** key and then clicking any element to insert inserts the element before the currently selected element. For example, if you have two questions on your form and have the second question highlighted, you can hold down **Shift**, go to the **Insert** tab and choose **Line** and the line is inserted before the second question.

View	Show	Admin Control Panel Access	Displays the **Admin Control Panel Access** bar at the bottom of the window. This panel allows you to login to the web server and perform web server functions, such as publishing forms and downloading data.

Tab	Group	Function	Description
		Show HTML Layout Borders	Mark the **Show HTML Layout Borders** option to display light gray marks in the HTML Viewer that represent the HTML table borders. As web forms are built, the elements are placed into tables behind the scenes. These borders are not visible in your published web form. Their purpose is to show you where elements are positioned on the web form. This feature is particularly useful if you are placing items in a section with multiple columns across the page.
	Elements	Properties	Displays the properties for the active element.
	Tree Representation	Display Question Text	Displays the questions in the tree view using the question text. If your question text is long, you may wish to view the elements by field name.
		Display Field Name	Displays the questions in the tree view using the field names.
Web	Browser	Refresh	Refreshes the HTML Preview panel of the design window so that you can see changes. Note that unless the Auto Update HTML option is not selected, the HTML Preview typically updates automatically.
		Stop	Stops the current refresh action on the HTML Preview panel of the design window.
		Auto Update HTML	When selected, the HTML Preview window automatically updates to display changes made to the web form. If not selected, you need to manually refresh the HTML window using the Refresh button.

Tab	Group	Function	Description
		Scroll Element into View	When selected, upon clicking an element in the tree view, the HTML Preview automatically scrolls so that you can see the element that you have clicked. In addition, when clicking an item in the HTML Preview, the tree view automatically scrolls to the same element. Finally, double clicking an item in the HTML Preview scrolls to the element in the tree view and opens the properties window for that element.
	Launch	Browser Preview	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 opens 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 appears 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.
		Control Panel	Opens the Remark Web Survey Control Panel (rwsad5.pl script) in a web browser. The Control Panel is used to set up server side functionality and administer web forms.

Tab	Group	Function	Description
		Mobile Device Preview	Allows you to preview a web form on a mobile device so that you can ensure browser compatibility. The mobile device must have a web browser capable of viewing and submitting web forms. You may select a device from the list or create a custom preview by clicking Custom, adjusting the size using the slider bars and then selecting Preview Device. Use this preview to ensure that your web form displays properly on the targeted device. You may need to adjust the width of the web form to accommodate mobile devices. **Note:** Most mobile browsers auto-size to the contents of the window. This preview does not taking auto-sizing into account.
Tools	Analysis	Easy Survey	Launches Remark Quick Stats, running an Easy Survey tabulation.
		Survey Wizard	Launches the Survey Wizard for customized survey tabulation.
		Easy Grade	Launches Remark Quick Stats, running an Easy Grade operation.
		Grade Wizard	Launches the Grade Wizard for customized test grading.
	Validation	Spelling	Launches the Spell Checker feature, which allows you to proof the web form for spelling mistakes.
		Database Connections	When using the Database Link feature to connect to an external database and pull information, click the Database Connections button to ensure the connection is still active. The software reports any issues with connecting to any specified databases throughout the web form.

Tab	Group	Function	Description
		Branching	Click the Branching icon to have Remark Web Survey validate all of the branch patterns on your web form. If errors are found, a report is provided. In addition, click the down arrow on the Branching icon to launch the Branch Visualizer. This window shows you all of the branch patterns on the form so that you can ensure you have set up your branch patterns accurately.
	Respondents	Respondent Detection	Launches the Respondent Detection window where you can view who has and has not submitted your web form (if using a Login page).
		Send Invitations	Launches Remark Web Survey's built-in email client, where you can send email invitations and reminders to participate in your web form.
	Data	Sync with Database	Allows you to locate the appropriate database for a question that uses the Database Link feature. This feature is useful when you set up Database Link but then later move the linked database to a different location and Remark Web Survey can no longer link to it automatically.

Quick Access Toolbar

The Quick Access Toolbar provides easy access to features that you commonly use. You can add items to the toolbar to streamline use of the software. The Quick Access Toolbar is located at the top of the Remark Web Survey window, next to the Application Button and above the Ribbon tabs.

To customize the Quick Access Toolbar

1. Click the down arrow on the **Quick Access Toolbar**.
2. Click Customize Quick Access Toolbar….
3. In the **Choose commands from** drop-down list, select the group from which you want to add a command.
4. Select the desired item from the list and then click the **Add** button.

5. When you have added all of the desired commands, click the **OK** button. The Quick Access Toolbar is now updated with your selected commands.

Using the Tree View

The Remark Web Survey software provides a design window for creating web forms. The web forms you create in the design window are broken down into elements. These elements are represented in the left side of the design window in a tree structure, often called a tree view. The tree view contains four basic collections: the form collection, the page collection, the section collection and the question collection. A collection is a group of items that are related. Each collection consists of its own specific elements. The collections can be described as follows:

Collection	Description
Form	Various page types are found in the form collection. The page types are divided into Standard Pages (basic web form pages) and Special Pages, which include login pages, web form complete pages, confirmation pages, session pause pages, popup info pages and server error pages.
Page	The page collection contains the section collections, which hold the remaining elements on the web form.
Section	The section collection contains the question collections, as well as label elements, line elements, multimedia and image elements. Buttons are also stored in sections.
Question	The question collection contains the answer elements, or the answers to each question on the web form.

Each collection and its respective elements are represented by what is called a node. A node is a single form element, such as a page, section, question or answer. Each type of element is described in full detail in later chapters of this user's guide.

The design window is where you make changes to your web form. You can insert, delete, cut, copy, paste, drag, view, change or format elements. The elements are coded by symbols depicting the type of element: page, section, label, question, answer, image, multimedia or line.

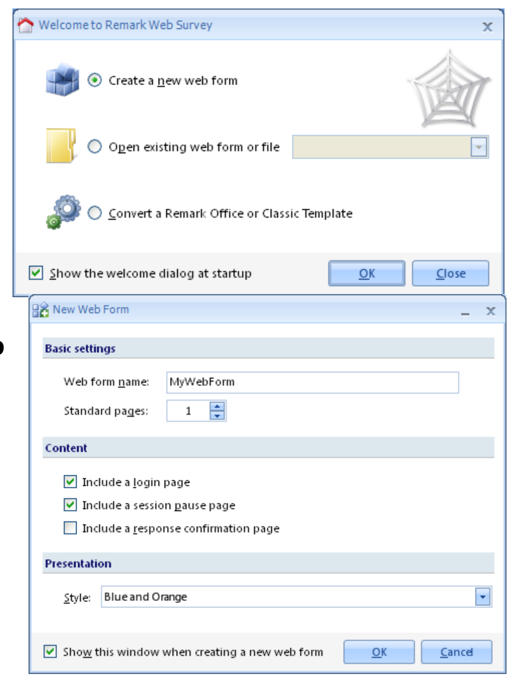
There are several sample web forms included with the Remark Web Survey software. Gravic, Inc. recommends that you open a sample web form before you start creating web forms so that you can better understand the design window. Single page forms can be opened in the Standard or Professional version of the software. Multi-page forms can only be opened in the Professional version of the software.

To open a sample form

1. If not already running, start Remark Web Survey.
2. Select the **Application Button** and click **Open**, or click . Note that Remark Web Survey lists any recently used forms as soon as your mouse goes over **Open**.
3. In the **Look in** list, select the **Program Files (x86)\Remark Web Survey 5\Sample Forms** folder (or choose the path in which Remark Web Survey is installed if it differs from the example above).
4. Select one of the sample files.
5. Click the **Open** button to open the web form.

Beginning a New Web Form

There are two ways to begin creating a new web form:



1. Upon starting the software, display the **Welcome** window (this option is controlled in the software preferences, which are accessible by selecting the Application button, , then Web Survey Options and then **Show the welcome window at startup**). In the **Welcome** window, mark the first option for **Create a new web form** and then click the **OK** button. Depending on your settings, Remark Web Survey starts up with a new web form created, ready for you to start adding elements or with the **New Web Form** window (see next page) .
2. If Remark Web Survey is already running, click the Application button, , and then click **New**. Depending on your program preferences, a new web form appears right away, or a **New Web Form** window appears. If the **New Web Form** window does not appear, you can skip to the next section to learn how to start adding elements. If the **New Web Form** window does appear, you can set up parameters for your web form before it is created. The following options are available:

Option	Description
Web form name	Enter a unique name for the web form in the **Web form** name box. Names cannot include spaces or special characters: &,:/\?*><%|. Try to keep web form names short, as they are part of the URL that you send to respondents when you invite them to participate in your web form.
Number of Standard pages	Enter the number of Standard pages you plan to include in the web form. Standard pages hold the questions, images and other elements of your web form. Type a number in the box or use the arrows to move up and down sequentially. (See Chapter 4 for detailed information about Standard pages.)
Include a login page	Mark the **Include a login page** checkbox to add a Login page that allows you to set up password protection on the web form. (See Chapter 4 for detailed information about Login pages.)
Include a session pause page	Mark the **Include a session pause page** checkbox to add a Session Pause page that allows respondents to pause a live web form and resume it at a later time without losing any data. (See Chapter 4 for detailed information about Session Pause pages.)
Include a response confirmation page	Mark the **Include a response confirmation page** checkbox to add a Response Confirmation page that allows respondents to view or print all of their responses prior to submitting the web form. (See Chapter 4 for detailed information about Response Confirmation pages.)
Style	Use the **Style** drop-down list to select a style for the web form. Styles are set up using the Style Properties window (see Chapter 7 for detailed information about creating styles).
Show this window when creating a new web form	Mark the **Show this window when creating a new web form** checkbox to always have this window appear when you select the Application button and then choose New. If this checkbox is not selected, when a new web form is created, the software automatically creates the necessary tree view structures with one Standard page, one Web Form Complete page, and the default style, and you can then begin adding elements to the web form.

- **Note:** To control whether you see the **New Web Form** window, select the Application button, click **Web Survey Options** and then mark the checkbox for **Show new web form window when creating a new web form**.

Inserting and Viewing Elements

Each element included in the web form is visible in the tree view structure. Sections are sub-nodes of page nodes, questions are sub-nodes of section nodes and answers are sub-nodes of question nodes. If there is a white expand icon located to the left of an element, this designates that there are additional levels under that particular node. If there is a black collapse icon next to an element, this designates that the node has been expanded as far as it can go. You can click the expand icon to open (enlarge) an item and click the collapse icon to close (shrink) an item.

When you want to insert an element onto your web form, go to the **Insert** tab in the Ribbon and then select the item you wish to insert. The item is inserted below the currently selected item. If you are on a **Section** node, the element is inserted at the bottom of the section. Alternatively, you may right click an element in the tree and choose **Insert** or **Insert Before** to insert elements.

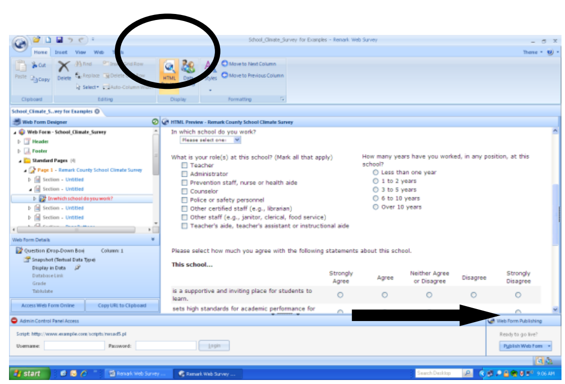
You may double click any node to view its properties. Alternatively, right click a node and then select **Properties**. Finally, you may highlight a node and then go to the **View** tab in the Ribbon and select **Properties**.

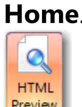
- **Note:** Each element type (e.g., question, answer, image, etc.) is covered in detail in Chapter 5.)

Viewing the Form

The design window provides an HTML Preview for seeing your web form as it appears in a web browser. In order for the HTML Preview window to be visible, you must have Microsoft Internet Explorer 8 or later installed, as outlined in the minimum system requirements (see Section 2.1 for further details). As changes are made using the tree view, the HTML Preview updates automatically (you may also click the Refresh button on the Ribbon bar). If you prefer not to have the HTML Preview update automatically (e.g., if you are working with a very large form), you may turn it off on the **Web** tab in the Ribbon.

To access the HTML Preview



1. With a web form open, go to the status bar, located in the bottom right corner of Remark Web Survey, which is called **View Controls**.
2. Click the  button, **HTML Preview**. Alternatively, go to the Ribbon and select **Home**. Click the **HTML Preview** Ribbon button 

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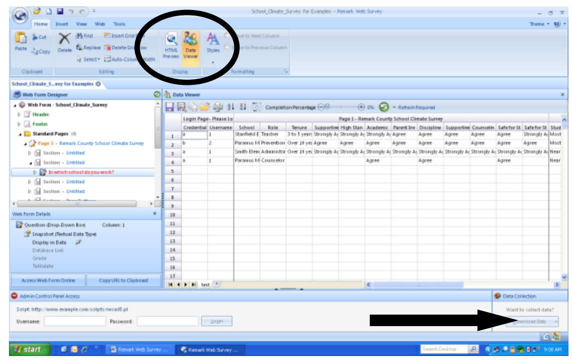
The data viewer window changes to the HTML Preview.

Viewing the Data

The design window provides a Data Viewer to view opened or downloaded data. The Data Viewer displays the data in a spreadsheet-style grid, where each column represents a question on your web form and each row represents one respondent's responses to your web form. The column headers are taken from the field names defined for each question when the questions are created.

- **Note:** When the Data Viewer contains data you may not edit elements in the tree view.

To access the Data Viewer

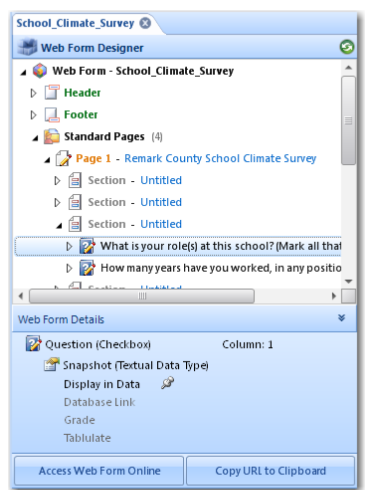


1. With a web form open, go to the bottom right corner of the status bar, which is called **View Controls**.
2. Click the  button, **Data Viewer**. Alternatively, go to the Ribbon and select the **Home** tab. Click the **Data Viewer** button, 

.

The HTML Preview window changes to the Data Viewer.

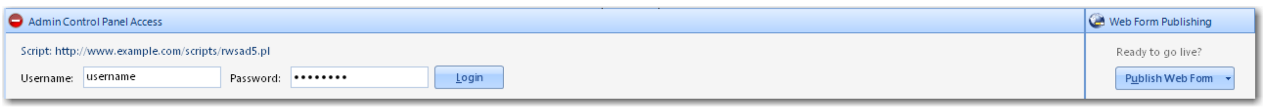
Tooltip Text and Descriptions



Most windows in Remark Web Survey employ tooltip text and descriptions. If you hover your mouse over an item, tooltip text appears. Or, in some windows, look at the bottom panel of the window to see a description of what you have selected (e.g., the Style Properties window). Additionally, some textboxes include explanatory watermark text to show you the type of information you are expected to enter. Finally, use the **Web Form Details** pane in the design window to see details about active items. The Web Form Details area is located underneath the tree view. The Web Form Details pane also shows you general details about your web form, such as the link to take the form and a link to copy the form URL to the Windows clipboard (this link is useful if you want to paste the URL into an email, for example). When a question is selected the Web form details area provides pertinent property information so that you do not have to open the Properties window to see basic information. You can optionally close the Web Form Details window by clicking the double arrow in the upper right corner of the window. When the arrows are pointing down, you can collapse the window. When the arrows are pointing up, you can expand the window.

Admin Control Panel Access

The Admin Control Panel Access bar is where you login to the web server to publish web forms and download data.



If it is not visible, you can view it by either clicking the expandable splitter  at the bottom of the design window or by clicking the **View** tab in the Ribbon and checking the box titled **Admin Control Panel Access** under the **Show** options.

In order to login to the administration script (rwsad5.pl), you need to have its URL entered in the web form's properties. It is advisable to have this information entered into the software's program options so that you do not have to keep entering it for every new web form (see Chapter 2). You also need a username and password for the rwsad5.pl script (also referred to as the Remark Web Survey Control Panel) that allows you to publish web forms and/or download data. Your webmaster or the person who installed the Remark Web Survey scripts should be able to provide this information to you. The Admin Control Panel is covered in greater contextual detail in Chapter 9.

Printing the Form

You may print web forms from the Designer component. Printing forms can be useful for proofreading or distributing to others for review prior to publishing. You can either send forms directly to a printer or print to a PDF file if you have a PDF print driver installed on your computer.

- **Note:** If you are using Remark Web Survey in conjunction with Remark Office OMR/Remark Classic OMR and plan to scan paper forms in addition to publishing them online, printed web forms from Remark Web Survey are not suitable for scanning. The equivalent paper form must be created in another package (e.g., a word processing package). If you already have a printed version of the form and have created a Remark Office OMR or Remark Classic OMR template, you may convert the template to a web form in Remark Web Survey.

To print a web form to a printer

1. If not already open, open the web form in Remark Web Survey by selecting the **Application Button** , then click **Open**, or click .
2. Select the **Application Button** and then choose **Print** from the menu.
3. Choose Print Active (active page only) or Print Entire Web Form.

4. Make the necessary selections from your printer window.

To print a web form to PDF

Printing to PDF tends to produce a better layout than sending it directly to the printer, and there are many free PDF print drivers available. If a PDF option is listed in your Printer window, then you have a PDF driver installed and my print the web form to it. If you do not have a PDF option in your Printer window, you can click the option to Search for PDF print drivers in Remark Web Survey.

1. If not already open, open the web form in Remark Web Survey by selecting the **Application Button** , then click **Open**, or click .
2. Select the **Application Button** and then choose **Print** from the menu.
3. Choose Print Active (active page only) or Print Entire Web Form.
4. Choose a PDF printer from the list of available printers. If you do not have a PDF printer listed, return to the previous step and choose **Search for PDF print drivers**. This action performs a Google search for PDF print drivers in your default web browser. You may then choose a driver to install. Once the driver is installed, you can return to this step and choose the PDF option as your printer.
5. Click the **OK** button to save the document as a PDF file.

   Open your PDF application and print the form (note that some PDF applications open automatically when the file is saved).

Chapter 4: Remark Web Survey Form Elements

Overview

When you design a web form in Remark Web Survey, you start at the form level, add pages, add sections and then add elements, such as questions, answers, labels, images, multimedia and lines.

The highest level of a Remark Web Survey web form is the *web form level*. This level is called the *form collection*. The form collection consists of several properties related to the overall web form as well as all of the pages on the web form.

Web Form Properties

At the web form level, there are many properties that can be set that pertain to how the overall web form functions. Many features are optional, but allow you to customize the functionality of your web form.

The web form properties can be accessed in any one of three ways:

- Double click the node that reads **Web Form – Form Name**.
- Right click the node that reads **Web Form – Form Name** and choose **Properties** from the menu.
- Click the node that reads **Web Form – Form Name** and choose **Properties** from the **View** tab in the Ribbon.

The web form properties are outlined in the following table:

Tab	Heading	Name	Description
General	Basic Settings	Web form name	A name for the web form. Names cannot include spaces or special characters: &,:/\?*><%|@. Try to keep web form names short, as they are part of the URL that you send to respondents when you invite them to participate in your web form.

Tab	Heading	Name	Description
		Admin script URL	The URL (path) to the Remark Web Survey Administration Script (rwsad5.pl). This script is posted on the web server and is necessary for web form administration. Your webmaster or the person who installed the scripts should be able to provide this URL to you. This script is also referred to as the Control Panel when it is accessed in a web browser. The **Admin script URL** must be a fully qualified URL (e.g., http://www.example.com/cgi-bin/rwsad5.pl).
		Data script URL	The URL (path) to the Remark Web Survey Data Script (rws5.pl). This script is posted on the web server and is necessary for web form data collection. Your webmaster or the person who installed the scripts should be able to provide this URL to you. The **Data script URL** must be a fully qualified URL (e.g., http://www.example.com/cgi-bin/rws5.pl).
		Data file name	A name for the data file that is stored on the web server for a web form. Note that the data files for each web form are stored in separate folders for every published web form. Therefore, customizing the file name is optional. The default data file name is MyData.
		Log file name	A name for the log file that is stored on the web server for a web form. Log files track respondent information, such as time and date of web form submission, IP address, login information, etc. Note that the log files for each web form are stored in separate folders for every published web form. Therefore, customizing the file name is optional. The default log file name is MyLog.

Tab	Heading	Name	Description
	HTML Display	HTML display language	The language in which the HTML is displayed on your published web forms. The language selected here is specified in the HTML source code of web forms that you create (this is called a "lang" tag in HTML). Please note that whether the language's characters display correctly is dependent upon the character set specified on the respondents' computer.
		Display progress indicators on pages	When selected, a progress indicator appears on each page of the web form to show respondents how much of the web form they have completed at any given time. Note that progress indicators cannot be used when you are using the page randomization feature.
		Progress indicator settings	The **Progress indicator settings** link allows you to customize the look and positioning of the progress indicator.
		Display progress caption	Displays a caption for the progress indicator (e.g., "50% complete").
	Progress indicator settings window	Horizontal alignment	Displays the progress indicator on each page in left, center or right alignment.
		Vertical alignment	Displays the progress bar at the bottom or top of each web form page.
		Progress forecolor	Select a color for the forecolor (front) of the progress indicator.
		Progress backcolor	Select a color for the backcolor (background) of the progress indicator.
	Submission notifications	Send email notifications on respondent submissions	Mark the **Send email notifications on respondent submissions** checkbox to set up email notifications every time the web form is submitted on the website. The recipient(s) listed receive an email message containing the responses for each web form submission.

Tab	Heading	Name	Description
		Email settings	Click the **Email settings** link to enter email settings for web form submission notifications.
	Email settings window	Admin email address	Enter the web form administrator email address (e.g., webmaster@example.com). This email address is listed as a point of contact if a respondent receives an error when filling in your web form.
		Recipient addresses	Respondent submissions are sent to the email addresses entered in **Recipient addresses**. Separate multiple email addresses with a semi colon (;).
		Advanced Notification Criteria	Click the **Advanced Notification Criteria** link to set up email alerts based on how specific questions are answered.
	Web Server	Use SMTP method to transport email messages	The **Web Server** settings are used to set up email transfers that originate on the web server, such as pause page reminder emails and respondent submission emails. Mark the **Use SMTP method to transport email messages** option to use Simple Mail Transport Protocol (SMTP) for sending notification emails. You need to have a valid SMTP server set up outside of Remark Web Survey. Once the SMTP server is functioning, the SMTP server information can be set up in the Remark Web Survey program options by your website administrator (see Chapter 2 for further details). Please note that your website administrator can advise you on what email method you are to use.
		SMTP Server	Enter the **SMTP server** address (e.g., mail.example.com).
		SMTP Port	Enter the **SMTP port** that email transfers use (typically port 25).
		Username	If using authentication, enter a valid **username**.

Tab	Heading	Name	Description
		Password	If using authentication, enter a valid **password** for the username specified.
		Use Sendmail method to transfer email messages	Mark the **Use Sendmail method to transfer email messages** option to use Sendmail for sending notification emails. Sendmail is an open source email transfer agent. You need to have Sendmail set up outside of Remark Web Survey to use this feature. Once the Sendmail functionality is working, the Sendmail information can be set up in the Remark Web Survey program options by your website administrator (see Chapter 2 for further details). Please note that your website administrator can advise you on what email method you are to use.
		Server path	Enter the Sendmail **Server path** (e.g., /usr/sbin/sendmail).
	Local Machine	Use SMTP method to transport email messages	The Local Machine settings are used to set up email transfers that originate from the Remark Web Survey software, including email invitations and reminders. Sendmail is not available for Local Machine settings. Mark the **Use SMTP method to transport email messages** option to use Simple Mail Transport Protocol (SMTP) for sending notification emails. You need to have a valid SMTP server set up outside of Remark Web Survey. Once the SMTP server is functioning, the SMTP server information can be set up in the Remark Web Survey program options by your website administrator (see Chapter 2 for further details). Please note that your website administrator can advise you on what email method you are to use and the proper settings.
		SMTP Server	Enter the **SMTP server** address (e.g., mail.example.com).
		SMTP Port	Enter the **SMTP port** that email transfers use (typically port 25).

Tab	Heading	Name	Description
		Enable a secured (SSL) connection	Mark the **Enable a secured (SSL) connection** checkbox to transmit information over Secure Sockets Layer (SSL), which provides security and data integrity for communications.
		Use the default credentials of the currently logged in user	If you need to use authentication, you can enter credentials or use those of the user. Mark the **Use the default credentials of the currently logged in user** checkbox to utilize the user's credentials (e.g., the person logged in when sending the emails from the Remark Web Survey Designer component). Otherwise, continue below to enter specific credentials.
		Username	If using authentication, enter a valid **Username**.
		Password	If using authentication, enter a valid **Password** for the username specified.
		Throttle Rate	The **Throttle rate** adds a delay while sending emails. The default setting is 500ms, meaning that one email is sent every 500 ms (in other words, two emails are sent per second). Throttling emails keeps the SMTP server from being overloaded when sending large numbers of emails.
		Timeout	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.
		Synchronize Settings	Synchronizes the local server settings with what was defined for local server settings in the Remark Web Survey program options. The program settings override the web form settings. This is a quick way to pull down the settings from the program options.

Tab	Heading	Name	Description
Access & Availability	Session timeouts and web form availability	Enforce session timeouts for password protected web forms when idle for	Use the **Enforce session timeouts for password protected web forms when idle for** option to enforce a timeout when a respondent is inactive for a specified period of time. Enter the time in the drop-down list. This feature only applies to password-protected forms (those using Login pages). After the specified time elapses with no activity, the respondent is prompted to login to the web form again in order to continue filling out the web form.
		Specify the web form's availability window (access time frame)	Use the **Specify the web form's availability window (access time frame)** option to specify the dates and times when the web form is active. If respondents attempt to access the web form outside of the specified time period, they receive an appropriate error message.
		Start time	Enter the date and time when the web form becomes active.
		End time	Enter the date and time when the web form becomes inactive. Respondents are not able to access the web form after this date and time.
	Respondent settings	Limit the accepted number of respondent submissions to	Set a maximum number of responses allowed for a web form. Once the maximum is reached, respondents are no longer able to access the web form and receive an appropriate error message.
		Remove respondent's incomplete data from server after	Specify the number of hours or days that you are allowed before incomplete web form submissions are removed from the server. An incomplete web form submission could be due to someone starting the web form and never completing it or someone pausing the web form and not returning to complete it.

Tab	Heading	Name	Description
		Base interval value on the number of hours that incomplete data resides on the server	Mark the **Base interval value on the number of hours that incomplete data resides on the server** option to use hours as the measure for removing incomplete web form submissions.
		Base interval value on the number of days that incomplete data resides on the server	Mark the **Base interval value on the number of days that incomplete data resides on the server** option to use days as the measure for removing incomplete web form submissions.
Additional Data	Display and tabulation settings	Display date submitted with field name	Mark the **Display date submitted with field name** option to include the submission date when downloading data. You may accept the default field name of Date or enter your own. If you wish to include this information in your analysis, mark the **Tabulate** checkbox.
		Display time submitted with field name	Mark the **Display time submitted with field name** option to include the submission time when downloading data. You may accept the default field name of Time or enter your own. If you wish to include this information in your analysis, mark the **Tabulate** checkbox.
		Display respondent's IP address with field name	Mark the **Display respondent's IP address with field name** option to include the respondent's IP address when downloading data. You may accept the default field name of IP Address or enter your own. If you wish to include this information in your analysis, mark the **Tabulate** checkbox.

Tab	Heading	Name	Description
		Display respondent's UID with field name	Mark the **Display respondent's UID with field name** option to include the respondent's UID when downloading data. The UID (unique identifier) is used by Remark Web Survey to track respondents' submissions (e.g., so that they may pause and resume the web form). You may accept the default field name of Respondent ID or enter your own. If you wish to include this information in your analysis, mark the **Tabulate** checkbox.
		Display web form duration with field name	Mark the **Display web form duration with field name** option to include the length of time it took each respondent to complete the entire web form. Please note that this time is from first login to completion. It does not remove any time in which the survey was paused. You may accept the default field name of Duration or enter your own. If you wish to include this information in your analysis, mark the **Tabulate** checkbox. A report detailing the number of submissions in a particular time interval is available in Remark Live Stats in the Remark Web Survey Control Panel (see Chapter 11).
		Track the respondent's IP address	By default, Remark Web Survey logs each respondent's IP address in the server log. Once logged, you have the option to display it in the data grid. If you do not wish to track the respondent's IP address, turn off the **Track respondent's IP address** checkbox. This allows for complete survey anonymity.

Advanced Notification Criteria

The Advanced Notification Criteria feature has two primary purposes:

1. To allow you to generate an email to a recipient based on how a question is answered.
2. To allow respondents to have their web form responses emailed directly to them.

Allowing responses to specific questions or sets of questions to be emailed directly to specific respondents allows instant notification of important information. Please note that this feature can work in one of two ways:

1. Web Form Level. The specified notifications only happens once the entire web form is submitted. Responses can be changed and the notification is not triggered until the entire web form has been completed.
2. Page Level. If someone answers the question as identified in the notification, when the respondent submits the page, the email notification is sent to the appropriate email address. If the respondent clicks the back button or at some other point revisits this question and changes it, the email recipient does not know this fact. The notification may be triggered again (depending on whether the criteria was met for the notification).
   - **Note:** Advanced notifications rely on an external email server. There are two places to set up details about your email server: Web Server and Local Server. Advanced Notification emails use the email properties for the Web Server.

To use Advanced Notifications to send emails based on how questions are answered

1. To set up Advanced Notifications at the Web Form Level, double click the top node in the tree view (Web Form – YourFormName), click **Email settings** and then click **Advanced Notification Criteria**. To set up Advanced Notifications at the page level, double click any Standard page in the tree view and then click the **Advanced Notification Criteria** link to view the **Notification Criteria Builder** window.
   - **Tip:** Setting up Advanced Notification Criteria is very similar to setting up Question Branching. You may wish to read Chapter 8, which describes Question Branching in detail.

The **Notification Criteria Builder** window consists of the following properties:

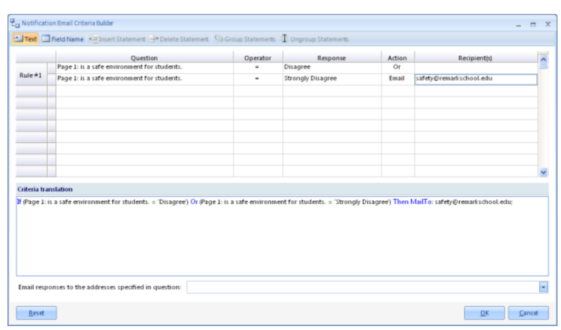
Property	Description
Text	Click the **Text** button to display the question text for each question on the web form instead of field names (applies to the Question column of the branching grid). This setting depends on your personal preference as to how you would like the questions displayed when selecting them from the Question drop-down list. If this setting is not selected, the questions are listed by field name in the Question drop-down list.

Property	Description
Field Name	Click the **Field Name** button to display the field name for each question on the web form instead of question text (applies to the Question column of the branching grid). This setting depends on your personal preference as to how you would like the questions displayed when selecting them from the Question drop-down list. If this setting is not selected, the questions are listed by question text in the Question drop-down list.
Insert Statement	Click the **Insert Statement** button to insert a new statement within the email notification grid. This feature is useful if you need to place a statement within other statements that you have already defined. Select an insertion point by clicking in a row first and when you click **Insert Statement**, the grid adds a row above your current selection point. It initially inserts the row as part of the selected statement. The **Rule Numbers** for the statements update themselves automatically as you begin to enter the criteria for the statement. You only need to use the Insert Statement function to add statements between other statements. If you are simply building a notification pattern from start to finish, use the rows of the email notification grid in sequence on the screen.
Delete Statement	Click the **Delete Statement** button to remove a statement within the email notification grid. Select an insertion point by clicking in a row first and when you click **Delete Statement**, the grid removes the selected statement(s).
Group Statements	Use the **Group Statement** option to group parts of the email notification pattern together. This feature is useful when setting up multiple criteria and notifications on one page. It allows you to further customize the criteria that determine the notification by grouping like statements together into one action.
Ungroup Statements	Use the **Ungroup Statements** option to ungroup parts of the notification criteria. Ungrouping statements can be accomplished once you have grouped statements, as described above. You can use the ungroup option to make changes.
Question	Displays the questions on the entire form. Use the **Question** list to select a question on which to base the email notification. How this question is answered triggers the email notification.

Property	Description
Operator	Displays the available operators for the notification, which include = (equal to), <> (not equal to), > (greater than), < (less than), >= (greater than or equal to) and <= (less than or equal to). Select the item to which your notification applies.
Response	Displays the response choices from the selected question. Select the **Response** choice that triggers the email notification or enter the appropriate text for a textbox/text area question. For example, if your choices are *Strongly Agree*, *Agree*, *Disagree* and *Strongly Disagree*, and choosing *Strongly Disagree* triggers the email notification, choose *Strongly Disagree* from this list. Or, if it is a textbox style question, enter the text exactly as you expect your respondents to enter text in order to trigger the next action.
Action	Allows you to select the next action. Use **Email** to set up the email notification when the particular response choice is selected. You enter the email address in the Recipient box (see below). Use **And** to continue to set up notification patterns whereby the next pattern in the sequence *must* also be true in order to trigger the notification. Use **Or** to continue to set up branch patterns whereby the next pattern in the sequence *may* also be true in order to trigger the notification.
Recipient(s)	Enter the email address to which you want the notification sent when the criteria specified is met. You may enter multiple email addresses separated by a semi-colon (;).
Reset	Resets the current notification pattern, allowing you to start over. Note that all statements are removed when you click the Reset button.

Notice that there is a **Criteria translation** box below the notification setup area that displays your notification patterns as you build them. You cannot edit the text in this window, but you may use it to double check your logic when setting up your notifications.

2. If desired, select whether to view the questions in the Questions column of the notification grid by **Text** (question text) or **Field Name**.
3. In the **Questions** column, select the first question on which to base the notification.



- **Note**: You may resize the columns in this grid as you see fit.

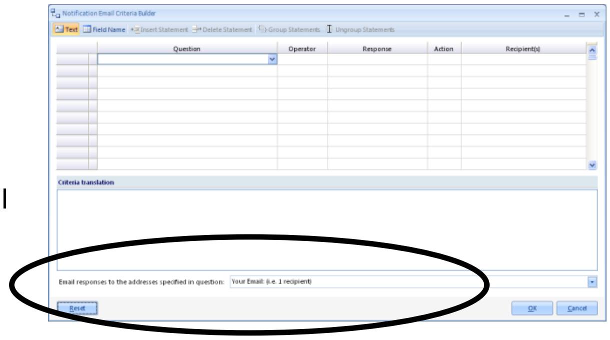
4. In the **Operator** column, select the appropriate operator for the branch pattern (e.g., Q1 = Yes or Q1 <= 5).
5. In the **Response** column, select or enter the question's response on which to base the email notification.
6. In the **Action** column, select the next action. If you want to add more parameters to the notification, select **And** or **Or**, depending on whether the next criterion *must* be true (AND) or *can* be true (OR) in addition to the previous criterion. If you have completed the setup and are ready to specify the recipient's email address, select **Email**.
7. If you have selected **Email** in the **Action** column, enter the appropriate email address or addresses. If using multiple email addresses, separate each one with a semi-colon (;). If you have selected **And** or **Or** in the **Action** column, leave the **Target** column blank.
8. If you have completed setup of the notification by entering the email addresses, click the **OK** button to save your changes. If you need to add more statements, continue to Step 10.
9. [Optional] Continue to add notification statements as needed. Notice that based on the operators used and other criteria, the row headers in the grid update with **Rule** numbers. The **Rule** numbers provide you with a quick way to see patterns in your notification criteria.
10. [Optional] If desired, use the **Group Statements** and **Ungroup Statements** buttons to refine the notification patterns. For example, if two parts of the pattern belong together, you may select them in the grid and then click the **Group Statements** button. Click and drag the row headers to select items to group together. When statements are grouped, Remark Web Survey evaluates them together before going on to the next notification sequence.
11. Click the **OK** button to save your changes.
12. When the web form is published and respondents begin entering answers to the questions that are part of the notification setup, the emails are generated to the appropriate recipients based on how the questions are answered.

To use Advanced Notifications to send emails to a respondent

1. Create a question on the form where respondents can type in their email address.
2. To set up Advanced Notifications at the Web Form Level, double click the top node in the tree view (Web Form – YourFormName), click **Email settings** and then click **Advanced Notification Criteria**. To set up Advanced Notifications at the page level, double click any Standard page in the tree view and then click the **Advanced Notification Criteria** link to view the **Notification Criteria Builder** window.
    - **Tip:** Setting up Advanced Notification Criteria is very similar to setting up Question Branching. You may wish to read Chapter 8, which describes Question Branching in detail.

The Advanced Notification Criteria window appears.

3. Locate the line that reads **Email responses to the addresses supplied in question** at the bottom of the window.
4. Use the drop-down list to select the question that you set up in Step 1 above. This is the question in which respondents type their email address so that they can receive an email containing all of their responses.
5. Click the **OK** button to save your changes.



Once the web form is published, respondents are able to enter an email address (or multiple addresses separated by a semi-colon (;)) and have all of their responses emailed to them once they submit the entire web form or a single page's responses if you have set up the notification on a page by page basis.

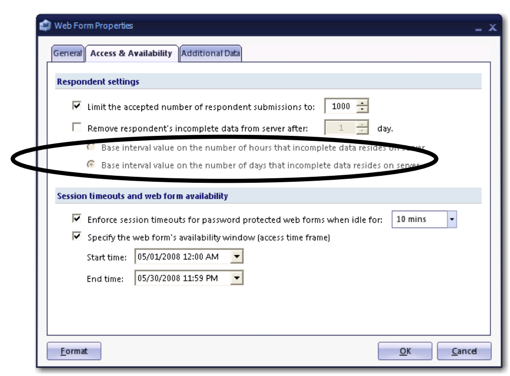
Access & Availability Settings

The Access & Availability settings were mentioned in the general table of web form level properties but are worthy of further discussion. The Access & Availability tab of the web form properties window allows you to control web form availability and respondent limitations. The following sets of instructions cover the features in the Access & Availability window.

To enforce session timeouts

When using a password protected web form, you can enforce a session timeout, whereby the web form is no longer available without reentering a valid password after a certain amount of idle time. The default idle time is ten minutes, but you may adjust this as you see fit. If respondents are inactive for the idle time, when they try to submit the current page, they are required to log in again. Any previously submitted data is reloaded.

1. Access the web form properties.
2. Click the **Access & Availability** tab.
3. Mark the checkbox for **Enforce session timeouts for password protected web forms when idle for**.
4. Set an idle time in the drop-down box. This time is in minutes.
5. Click the **OK** button to save the changes.

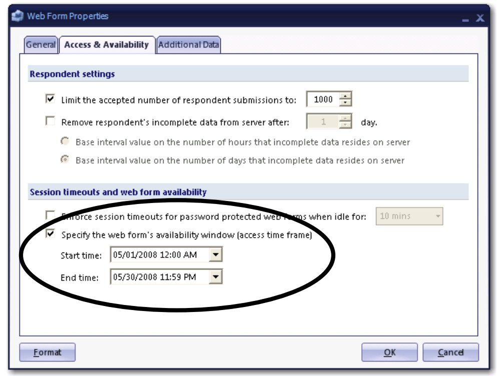


To specify an availability window

1. Each web form you publish can have an availability window, which is the time when the web form is active. Once the availability window expires, the web form is no longer accessible to respondents. If respondents attempt to access the web form outside of the specified time period, they receive an appropriate error message. If the web form availability window expires while a respondent is submitting responses or has the web form

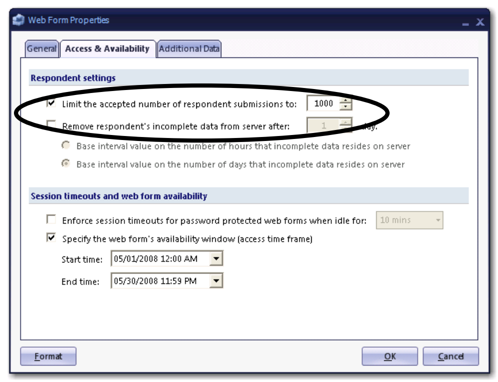
paused, they are not be able to submit the web form. We suggest that you inform respondents that the entire web form must be completed within the specified timeframe. Note that incomplete submissions are still available for download when downloading data.

2. Access the web form properties.
3. Click the **Access & Availability** tab.
4. Mark the checkbox for **Specify the web form's availability window**.
5. Enter a **Start time** and an **End time**. Use the drop-down arrow to view a calendar where you can select a date. You can type the time in the appropriate location. This time is in minutes.
6. Click the OK button to save the changes.



To limit the number of respondents

1. You may limit the number of respondents who can submit a web form. Once the designated number of successful submissions is reached, the web form is no longer accessible to respondents and they receive an appropriate error message.
2. Access the web form properties.
3. Click the **Access & Availability** tab.
4. Mark the checkbox for **Limit the accepted number of respondent submissions to**.
5. Enter the number of accepted submissions in the box. You can either type a number or use the up and down arrows to select a number.
6. Click the **OK** button to save the changes.

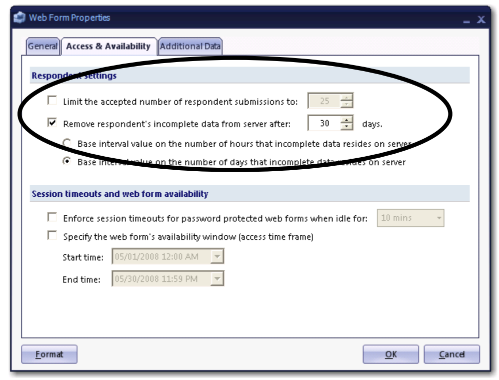


To remove incomplete data

1. You may remove incomplete web form submissions (data) after a certain amount of time. As respondents submit pages of a web form, data is stored in the respondents' UID file on the web server, which is a small text file. Once the entire web form is submitted, the UID file is automatically removed from the web server. An incomplete submission typically comes from a respondent who either starts a web form but never completes it, or who pauses the web form after submitting a portion of the data but never returns to complete the web form. Be cautious when removing incomplete submissions; once they are removed, the data is permanently deleted. If you allow respondents to pause the web form, be sure to advise them of how long they have to come back and complete the web form before their data is lost. The scripts check for incomplete submissions to remove whenever interaction with the data script (rws5.pl) and web form occurs.

- **Note:** Remark Web Survey is capable of downloading incomplete data submissions. If you remove incomplete data from the web server, you are not able to use this feature.

2. Access the web form properties.
3. Click the **Access & Availability** tab.
4. Mark the checkbox for **Remove respondent's incomplete data from server after**.
5. Enter the number of days or hours in the box. You can either type a number or use the up and down arrows to select a number.
6. Choose whether the number you entered in Step 4 is days or hours by selecting the appropriate radio button: Hours: Base interval value on the number of hours that incomplete data resides on the server, or Days: Base interval value on the number of days that incomplete data resides on the server.
7. Click the **OK** button to save the changes.



Web Form Pages

Remark Web Survey allows you to create seven types of web form pages (form elements) when designing a web form.

Name	Description
Standard Page	Web form page containing sections, which in turn contain elements, such as questions, answers, images, multimedia and labels. At least one Standard page is required per web form. Standard pages are those pages that allow you to ask questions of your respondents.
Popup Info Page	Web form popup page containing static information that needs to be presented to the respondent. This page does not have questions on it to be submitted by the respondent; it is for informational purposes only. You can set up a label hyperlink to a Popup Info page. Popup Info pages are optional.
Login Page	Web form page containing an area for respondents to enter a password to access and submit the form. Login pages are optional.

Name	Description
Web Form Complete Page	Success page that is displayed when the respondent submits the web form (e.g., a thank you page). At least one Web Form Complete page is required per web form (you can have more than one and use question branching to direct respondents to different Web Form Complete pages). You can build the Web Form Complete page in Remark Web Survey or point it to an existing page on your website.
Response Confirmation Page	Web form page displaying all of the submitter's (respondent's) responses to each question. Responses can be changed by clicking the desired question. This page can be printed so that the respondent has a copy of his or her responses. Response Confirmation pages are optional.
Session Pause Page	Web form page that allows respondents to pause the web form so that they may complete it at another time. Respondents can enter an email address and an email reminder is sent, providing a link to go back to the web form. Session Pause pages are optional.
Server Error Page	Web form page that returns customized error messages to respondents when a server side problem arises (e.g., the password entered is invalid). Server Error pages are optional. If not used, Remark Web Survey utilizes default error messages that are built into the software when errors occur.

Pages are grouped into two containers in the tree view: Standard Pages and Special Pages. The Standard Pages container holds only standard pages. The Special Pages container holds the remaining pages. These groupings make it easier to navigate the tree view.

The following sections describe the properties of the page types in detail.

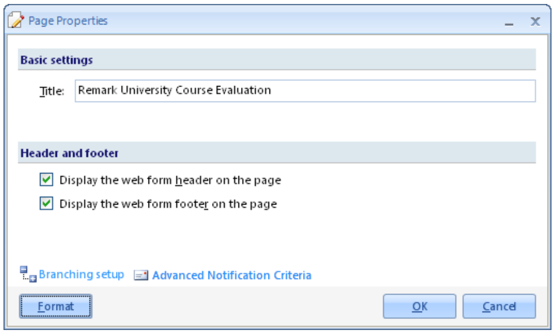
Standard Pages

Standard pages are the basic pages of a web form. They hold the sections of questions being asked, along with images, lines, multimedia and labels, if desired. Standard pages are the most common type of page found in a web form. You must have at least one Standard page in any web form. The following table lists the properties of Standard pages:

Section	Property	Description
Basic settings	Title	Enter the title that appears on the title bar when displayed in a web browser.
Header and Footer	Display the web form header on the page	Mark the **Display the web form header on the page** checkbox to display the header you have defined on the selected web page(s). Headers are created independently of pages and can be applied to any page.

Section	Property	Description
	Display the web form footer on the page	Mark the **Display the web form footer on the page** checkbox to display the footer you have defined on the selected web page(s). Footers are created independently of pages and can be applied to any page.
	Branching setup	Sets up branches on the page so that if a specific response is selected, the respondent is directed to another page (also known as skip patterns). See Chapter 8 for a complete description of branching.
	Advanced Notification Criteria	Click the **Advanced Email Notifications** link to set up email alerts based on how specific questions are answered.
Format	Format	Use the **Format** button to format the style of the web page. Formatting is covered in detail in Chapter 7.

To insert a standard page in a web form



1. From the Ribbon, select the **Insert** tab and then click **Page**. (Note you may also insert pages by right clicking the tree view and then clicking **Insert** or **Insert Before**.)
2. Enter settings as desired, as described previously.
3. Click the **OK** button. The Standard page is added to the Standard Pages container automatically. You may now start adding sections (optional) and other elements to the web form.
    - **Tip:** When you want to change properties for all Standard pages at one time, you may select the entire Standard Pages container and then adjust the properties (e.g., right click the **Standard Pages** container node and then click **Properties**). This action changes applicable settings for all Standard pages.

Popup Info Pages

A Popup Info page contains static information that you want to present to your respondents. It appears in a separate window, often referred to as a popup window. The respondents' browser typically controls the size of this window. You may place information on this page that is necessary for your respondents to read in order to properly fill in your form. For example, if you were conducting a survey on a specific product, you could use a Popup Info page to show an image of the product along with a description. The respondents could use this information to answer questions about the product.

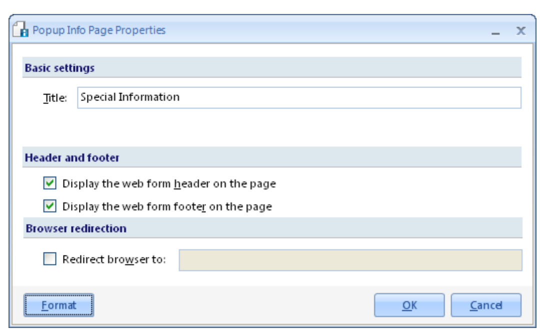
Utilizing Popup Info pages is a two-step process. First you have to create the Popup Info page containing the static information you want respondents to see. Once you have created a Popup Info page, you can link to it by adding a label to the web form. In the label properties window, mark the option for Hyperlink and then choose the desired Popup Info page from the drop-down list. When respondents click the label, they see the Popup Info page.

The following table lists the properties of Popup Info pages:

Section	Property	Description
Basic settings	Title	Enter the title that appears on the title bar when displayed in a web browser.
Header and Footer	Display the web form header on the page	Mark the **Display the web form header on the page** checkbox to display the header you have defined on the selected web page(s). Headers are created independently of pages and can be applied to any page.
	Display the web form footer on the page	Mark the **Display the web form footer on the page** checkbox to display the footer you have defined on the selected web page(s). Footers are created independently of pages and can be applied to any page.
Browser redirection	Redirect browser to	Mark the **Redirect browser to** checkbox to use an existing web page as your Popup Info page. The respondents' web browser displays this page when the Popup Info page is launched. (Optional)
Format	Format	Use the **Format** button to format the style of the web page. Formatting is covered in detail in Chapter 7.

To insert a Popup Info page in a web form

1. From the Ribbon, select the **Insert** tab, then click the down arrow on **Page** to reveal a list of special pages. (Note you may also insert pages by right clicking the tree view and then clicking **Insert** or **Insert Before**.)
2. Select **Popup Info**.
3. Enter settings as desired, as described previously.
4. Click the **OK** button. The Popup Info page is added to the **Special Pages** container automatically.



5. Add a label on a different web form page (where you want to link to your Popup Info page), mark the checkbox for **Hyperlink** in the **Label Properties** window and then choose the **Popup Info** page as your hyperlink.

Response Confirmation Pages

Response Confirmation pages provide respondents with a listing of all of their answers to the questions on the web form. The Response Confirmation page appears as the last page of the web form (prior to the Web Form Complete page) so that respondents can review the information and then go back and make changes if desired (a back button is provided by default on the Response Confirmation page for this purpose). Respondents can also click a link next to each question on the Response Confirmation page to go to that question in the web form and adjust their response. The Response Confirmation page can also be printed (using the web browser's print options) so that respondents have a record of their responses.

When respondents navigate to the Response Confirmation page of the web form, they see each question listed and then beneath the question, the answer choice they selected. The HTML Display portion of the answer choice is displayed to the respondent. There is also a Change Response link next to the question that the respondent can click to go directly to the desired question in the web form. Note that if your web form utilizes complex branching, respondents may have to navigate through multiple web form pages before returning to the Response Confirmation page (depending on the answer they choose).

When building Response Confirmation pages, you may not add additional questions and answers, but you may add other elements to the page such as lines, labels, images and multimedia. You may wish to add a label explaining to respondents what the Response Confirmation page is used for and how to adjust responses.

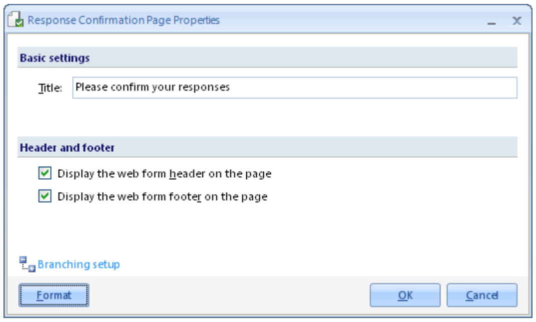
The following table lists the properties of Response Confirmation pages:

Section	**Property**	**Description**
Basic settings	Title	Enter the title that appears on the title bar when displayed in a web browser.
Header and Footer	Display the web form header on the page	Mark the **Display the web form header on the page** checkbox to display the header you have defined on the selected web page(s). Headers are created independently of pages and can be applied to any page.
	Display the web form footer on the page	Mark the **Display the web form footer on the page** checkbox to display the footer you have defined on the selected web page(s). Footers are created independently of pages and can be applied to any page.

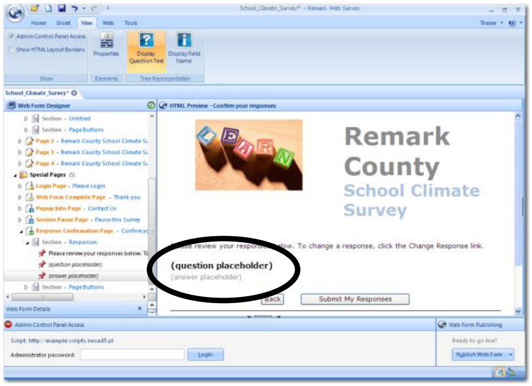
Section	Property	Description
	Branching setup	Sets up branches on the page so that if a specific response is selected, the respondent is directed to another page (also known as skip patterns). Branching is useful on a Response Confirmation page when displaying various Web Form Complete Pages based on responses to previous questions. See Chapter 8 for a complete description of branching.
Format	Format	Use the **Format** button to format the style of the web page. Formatting is covered in detail in Chapter 7.

To insert a Response Confirmation page in a web form

1. From the Ribbon, select the **Insert** tab and then click the down arrow on **Page** to reveal a list of special pages. (Note you may also insert pages by right clicking the tree view and then clicking **Insert** or **Insert Before**.)
2. Select Response Confirmation.
3. Enter settings as desired, as described previously.
4. [Optional] Click the **Format** button to adjust the text formatting (see Chapter 7 for further details about formatting).
    - **Note:** Rich text formatting is not available for Response Confirmation page question and answer placeholders.
5. Click the **OK** button. The Response Confirmation page is added to the **Special Pages** container automatically.



A **Question Placeholder** and an **Answer Placeholder** are inserted into the Response Confirmation page automatically. The Question and Answer Placeholders represent the formatting of the question listing. They are displayed with the text "question placeholder" and "answer placeholder" as you build the web form. When the web form is published and respondents are viewing the Response Confirmation page, the placeholder text is replaced with the actual question and answer text from the web form. When you open the properties for either item, you see some descriptive text under Label text. You may not change the text of the placeholders; however, you may format the attributes of the placeholders by adjusting the format options. The formatting you choose appears on the real Response Confirmation page as respondents submit your form.



Session Pause Pages

A Session Pause page provides respondents with the capability of stopping in the middle of a web form and then continuing from the same point at a later time. This feature is especially useful for long web forms. When respondents want to pause the web form, they click a pause button. A page is then displayed that they can either bookmark for later return or they can enter their email address. When using the email function, an email reminder is sent to them with a hyperlink that takes them back to the web form to complete it at the time of their choice. When respondents return to the web form by clicking the hyperlink or bookmark, they go back to the same page from which they left. All previously submitted responses are still stored in the data file. You may limit the amount of time respondents have to return to the web form through the removal of incomplete form submissions after a certain amount of time has passed (be sure to advise them of the available time to submit the web form in your pause page and/or email text).

Using the option to email a link to the respondent relies upon the email server setting in the web form properties. Session Pause page email reminders use the mail server settings for the web server. These settings are covered later in this chapter.

- **Note:** If you are not providing the ability to email a return link to the survey, you should add a label to the Session Pause page with explicit instructions on how to bookmark the page for later return.

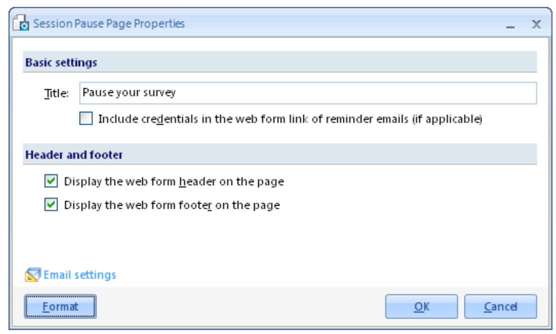
The following table lists the properties of Session Pause pages:

Section	Property	Description
Basic settings	Title	Enter the title that appears on the title bar when displayed in a web browser.
	Include credentials in the web form link of reminder emails	When using a Login page you can optionally include respondents' username and/or password in the web form invitation link. In this case, you can also include those credentials in the Session Pause page reminder email link that is sent to respondents when they pause the web form by marking the checkbox for **Include credentials in the web form link of reminder emails**. When pausing forms, respondents receive a reminder email that includes a link to resume the web form and their username and/or password are included in the link so that they are automatically logged into the web form. This feature is useful if you do not want respondents to have to remember login information.
Header and Footer	Display the web form header on the page	Mark the **Display the web form header on the page** checkbox to display the header you have defined on the selected web page(s). Headers are created independently of pages and can be applied to any page.

Section	Property	Description
	Display the web form footer on the page	Mark the **Display the web form footer on the page** checkbox to display the footer you have defined on the selected web page(s). Footers are created independently of pages and can be applied to any page.
Format	Format	Use the **Format** button to format the style of the web page. Formatting is covered in detail in Chapter 7.

To insert a Session Pause page in a web form

1. From the Ribbon, select the **Insert** tab and then click the down arrow on **Page** to reveal a list of special pages. (Note you may also insert pages by right clicking the tree view and then clicking **Insert** or **Insert Before**.)



2. Select Session Pause.
3. If necessary, click the **Email settings** link to enter the administrator email address and mail server information. This information is automatically inserted if you have entered it into the Remark Web Survey program options (accessible from the Application Button). If you have not entered this information in the program options, you need to enter it on the Session Pause page properties.
    - **Note:** Email settings should be obtained from your network or website administrator.
4. Enter settings as desired, as described previously.
5. Click the **OK** button.
6. An email question element is automatically added to the Session Pause page. If you wish to format it, double click the node that reads **Please enter your email address** and format as desired.

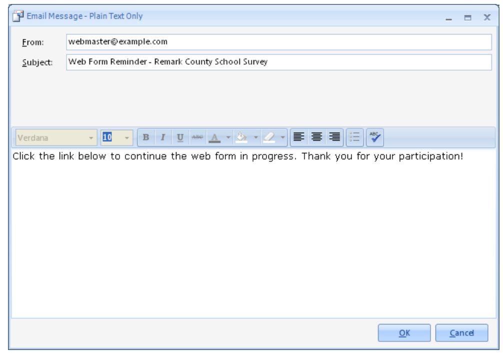
The Session Pause page is added to the **Special Pages** container automatically. Be sure to add at least one pause button to your web form so that respondents can access your Session Pause page.

To customize the reminder email

When a respondent pauses the web form, if you have set up email settings on the pause page, a reminder email is sent. You may customize the email that is generated by entering your return email address, a subject line and the body text of the email message. Please note that the email reminder is sent to recipients in plain text format so rich text formatting options are disabled in this window.

1. Double click the **Please enter your email address** node in the tree view to view its properties. (This question element is added to all Session Pause pages automatically.)

2. At the bottom of the window, click the **Reminder email settings** link.
3. Enter a valid **From** email address and a **Subject** line.
4. If desired, modify the body of the email message. The link to the web form is automatically added to the body of the message when the email is generated.

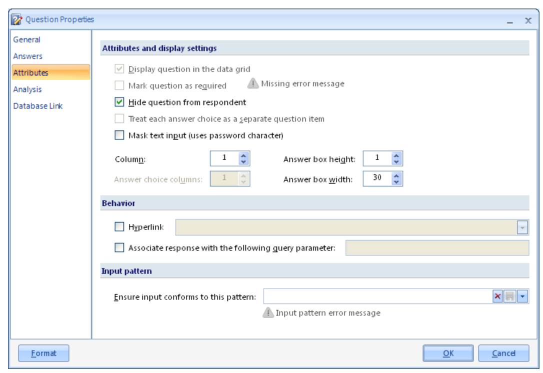


When using Session Pause pages with email, ensure that you have set up email functionality (as outlined in Step 3 in the previous instructions) in the program options or in the web form's properties (see Chapter 2. for further information about email setup).

To hide the email address question

If you prefer not to use the email functionality of the Session Pause page, you may instead ask your respondents to bookmark the page. It is suggested that you add a label to the Session Pause page with instructions for bookmarking the page. In this case, you need to hide the email address element.

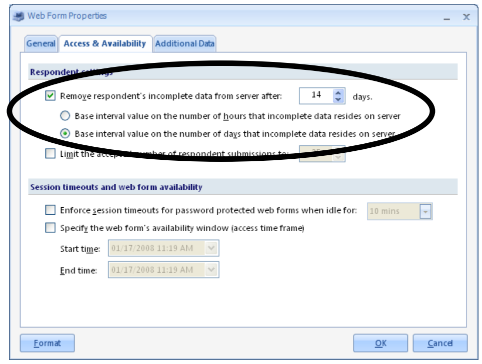
1. Double click the node that reads **Please enter your email address**.
2. Go to the **Attributes** section.
3. Mark the checkbox for Hide question from respondent.
4. Click the **OK** button. The email address element is visible as you design the web form, but is hidden from respondents when they are submitting the web form. Be sure to tell respondents to bookmark the page if you choose not to use the email element.
    - **Note:** We advise hiding the email question element as opposed to deleting it because if you delete the email address question, you cannot re-insert it. If you wish to allow email reminders after deleting the email question element, you need to delete and recreate the Session Pause page.



To remove incomplete form submissions

You may remove incomplete web form submissions after a certain amount of time has passed. For example, if respondents begin the web form, pause and then never complete it, you can remove their incomplete data and ability to re-login to the web form.

- **Note:** Remark Web Survey Professional is capable of downloading incomplete data submissions. If you remove incomplete data from the web server, you are not able to use this feature.



1. Double click the top node in the tree view with the web form title.
2. Select the **Access & Availability** tab.
3. Mark the checkbox for **Remove respondent's incomplete data from the web server after**.
4. Enter the desired number of days or hours, and then choose whether to base the interval on hours or days that the incomplete data resides on the web server.
5. Click the **OK** button.

Once the time limit is exceeded, any incomplete data is removed from the server. Any time the web form is accessed or pages are submitted, the software performs a check to see if incomplete submissions need to be removed.

Web Form Complete Pages

A Web Form Complete page is the last page your respondents see when they submit a web form. You can think of a Web Form Complete page as a "thank you" page. It lets respondents know that they have completed the form successfully. You may have more than one Web Form Complete page if desired. For example, if your form uses question branching, you may want respondents to end up at different Web Form Complete pages based on how specific questions are answered. Every web form must have at least one Web Form Complete page. You have the option of either designing the page within Remark Web Survey, or redirecting your respondents to another web page created outside of Remark Web Survey that exists on your website. When you create a new web form, a Web Form Complete page is automatically added to the web form along with a section.

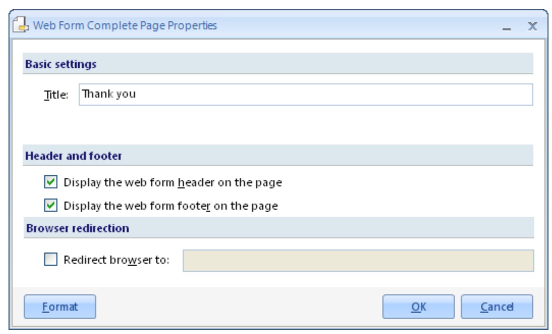
The following table summarizes the Web Form Complete page options:

Section	Property	Description
Basic settings	Title	Enter the title that appears on the title bar when displayed in a web browser.
Header and Footer	Display the web form header on the page	Mark the **Display the web form header on the page** checkbox to display the header you have defined on the selected web page(s). Headers are created independently of pages and can be applied to any page.

Section	Property	Description
	Display the web form footer on the page	Mark the **Display the web form footer on the page** checkbox to display the footer you have defined on the selected web page(s). Footers are created independently of pages and can be applied to any page.
Browser redirection	Redirect browser to	[Optional] Mark the **Redirect browser to** checkbox to use an existing web page as your Web Form Complete page (designed outside of Remark Web Survey and published online). The respondents' web browser displays this web page when the Web Form Complete page is launched.
Format	Format	Use the **Format** button to format the style of the web page. Formatting is covered in detail in Chapter 7.

To insert a Web Form Complete page in a web form

1. From the Ribbon, select the **Insert** tab and then select the down arrow on **Page** to reveal a list of special pages. (Note you may also insert pages by right clicking the tree view and then clicking **Insert** or **Insert Before**.)
2. Select Web Form Complete.
3. Enter settings as desired, as described previously.
4. Click the **OK** button. The Web Form Complete page is added to the **Special Pages** container automatically. You may optionally add elements (labels, images, etc.) under the Section portion of the Web Form Complete page (see Chapter 5 for more information about adding other elements).



Login Pages

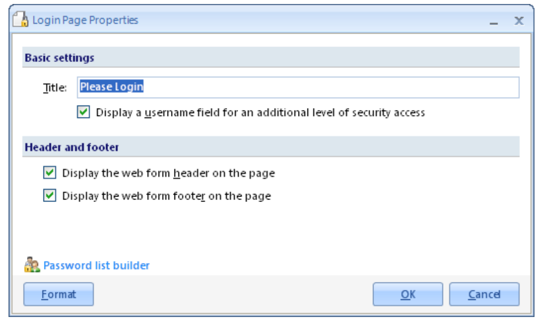
Remark Web Survey allows you to password protect any web form that you create. Requiring a password to submit a web form allows you to control who has access to your web form. Respondents are not able to view a password protected web form until they successfully enter a valid password. Passwords also allow you to limit the number of times respondents can submit a web form. You control how many times any given password can be used. When the limit is reached, respondents receive a "password expired" error message when attempting to access the web form. Password lists can be automatically generated, imported from an existing database or manually entered into the software. In addition, you may input a corresponding username, name and/or email address and use that information to track which respondents have completed your web form (see Chapter 10 for detailed information about Respondent Detection).

To utilize password protection, you add a Login page to a web form. The Login page provides a place for respondents to enter passwords in order to access and submit the web form. Once a Login page is inserted, a password question element box is automatically inserted (do not delete the password box; if it is deleted, you need to remove and reinsert the entire Login page). The password question element is a textbox that allows respondents to type in their passwords. You may format the password question element however you desire by using the question's format options. To format the password element, double click its node in the tree view and then click the **Format** button.

The following table summarizes the Login page options:

Section	Property	Description
Basic settings	Title	Enter the title that appears on the title bar when displayed in a web browser.
	Display a username field for an additional level of security access	Mark the **Display a username field for an additional level of security access** checkbox to add a username textbox to the login page. You enter a valid list of usernames in the **Password Builder**. Respondents have to enter a valid username and password to access the web form.
Header and Footer	Display the web form header on the page	Mark the **Display the web form header on the page** checkbox to display the header you have defined on the selected web page(s). Headers are created independently of pages and can be applied to any page.
	Display the web form footer on the page	Mark the **Display the web form footer on the page** checkbox to display the footer you have defined on the selected web page(s). Footers are created independently of pages and can be applied to any page.
	Password list builder	Click the **Password list builder** link to enter a valid list of passwords required to access the web form.
Format	Format	Use the **Format** button to format the style of the web page. Formatting is covered in detail in Chapter 7.

To insert a Login page in a web form



1. From the Ribbon, select the **Insert** tab and then click the down arrow on **Page** to reveal a list of special pages. (Note you may also insert pages by right clicking the tree view and then clicking **Insert** or **Insert Before**.)
2. Select **Login**.
3. Enter settings as desired, as described previously.

You must also enter a valid list of passwords and the number of acceptable uses on the Login page. Use the **Password List Builder** to set up valid passwords for the web form. You may import a list of passwords from an existing database or enter them into the Remark Web Survey software.

4. Click the **Password list builder** link to enter valid passwords.

The following table summarizes the available Password Builder options:

Property	Description
Username Field	Use the Username column to manually enter a list of usernames. The keyboard shortcut for Paste (Ctrl + V) also works in this grid, allowing you to paste a list of passwords from the Windows clipboard. The Username column only appears of the option for **Display a username field for an additional level of security access** is marked on the Login page's properties.
Password Field	Use the **Password** column to manually type a password list. The keyboard shortcut for Paste (Ctrl + V) also works in this grid, allowing you to paste a list of passwords from the Windows clipboard.
Respondent Name Field	Use the **Respondent Name** column to manually type the respondents' names. The keyboard shortcut for Paste (Ctrl + V) also works in this grid, allowing you to paste a list of names from the Windows clipboard.
Email Address Field	Use the **Email Address** column to manually type an email address list for your respondents. The keyboard shortcut for Paste (Ctrl + V) also works in this grid, allowing you to paste a list of email addresses from the Windows clipboard.

Property	Description
Maximum number of accepted submissions using a single password before it is expired	Specifies the number of times each password can be used. Select 0 for unlimited usage. When limiting the number of submissions per password, once the limit is reached, respondents receive an “expired password” message if they attempt to use an expired password.
Maximum number of passwords per file when publishing	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 is equal to the number of respondents.
Database Connection Settings	Allows you to select a database containing a list of passwords for the form. If you import the information from a database, you do not have to manually enter passwords, usernames, names and email addresses. You can also clear a previous connection using the **Clear connection** link.
Database	Displays the database file name after one is set up.
Type	Choose a type of database from the drop-down list. Then click the **Open** folder to select the database containing the password list.
DSN	If using an ODBC connection, choose the DSN from the **DSN** drop-down list. Mark whether it is **Directory based** or **DSN based**. ODBC DSN is a pointer that tells the system how to connect to a specific database. It combines the database location with the specific driver information and connection details.
Username	If your database requires a login, enter the **Username**.

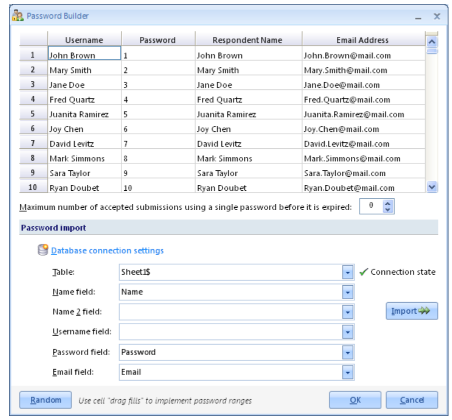
Property	Description
Password	If your database requires a login, enter the **Password**.
Connection string	Displays the connection string that is working behind the scenes to connect to your selected database.
Test Connection	You may optionally click the **Test Connection** button to test whether you can connect to this database.
Table	Select the table in the database that contains the passwords.
Name field	Select the field in the database that contains the respondents' names. (Optional)
Name 2 field	Select the field in the database that contains the respondents' names. (You can optionally separate first and last name.) (Optional)
Username field	Select the field in the database that contains the respondents' usernames. (Optional)
Password field	Select the field in the database that contains the respondents' passwords.
Email Address field	Select the field in the database that contains the respondents' email addresses. (Optional)
Import data	Click the **Import data** link to complete the import.

- **Note:** The password, name, username and email address fields are used to track which respondents have submitted your web form. When the data are downloaded, Remark Web Survey can provide a Respondent Detection report, which displays a list of who has and has not submitted your web form based on these fields. You can then use this list to send an email reminder to respondents who have not yet submitted your web form using Remark Web Survey's Send Invitations function. Enter password information manually or by clicking **Database connection settings** to import a list of passwords, as described in the previous table.

5. [Optional] If you prefer, random passwords can be assigned to existing names, usernames and/or email addresses. This feature is useful if you have a list of recipients in an external file but do not have a password for each one. To use the Random feature, you must first enter the names, usernames and/or email addresses of the recipients, as explained in the previous table. Then click the **Random** button.
   a) Select the length of passwords, whether to include symbols in the password (otherwise passwords are a combination of letters and numbers only) and whether to overwrite any existing passwords (if there are any).

b) Click the **OK** button to generate the passwords.

6. Click the **OK** button. The Login page is added to the **Special Pages** container automatically.
   - **Special Note:** If you want to enter a range of passwords in sequential order, enter the first password in the first cell of the password grid. Click on the right cell border until you see a crosshair and then drag down the column until you reach the number of rows you wish to fill. When you release the mouse button, the software automatically fills the passwords in sequential order. For example, if you type 1 in the first box and then drag downward to encapsulate 100 cells, you have a password range of 1-100.



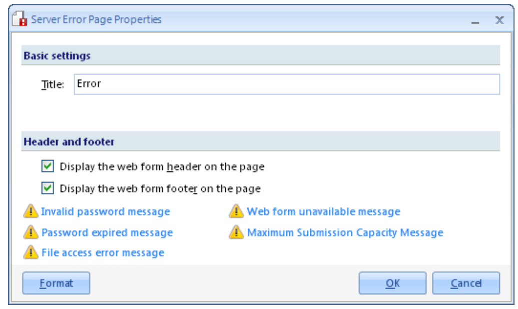
Server Error Pages

Server Error pages provide customized error messages when an error occurs during a web form submission. Server errors are those that occur on the web server during processing. If you do not add a Server Error Page to your form, default messages are displayed if an error is encountered. The following table summarizes the Server Error Page options:

Section	Property	Description
Basic settings	Title	Enter the title that appears on the title bar when displayed in a web browser.
Header and Footer	Display the web form header on the page	Mark the **Display the web form header on the page** checkbox to display the header you have defined on the selected web page(s). Headers are created independently of pages and can be applied to any page.
	Display the web form footer on the page	Mark the **Display the web form footer on the page** checkbox to display the footer you have defined on the selected web page(s). Footers are created independently of pages and can be applied to any page.
	Message Links	Click any of the available message links to customize the error message respondents see. The messages that can be customized include: Invalid Password, Password expired, File access error, Web form unavailable and Maximum submission capacity.
Format	Format	Use the **Format** button to format the style of the web page. Formatting is covered in detail in Chapter 7.

To insert a Server Error page in a web form

1. From the Ribbon, select the **Insert** tab and then click the down arrow on **Page** to reveal a list of special pages. (Note you may also insert pages by right clicking the tree view and then clicking **Insert** or **Insert Before**.)
2. Select **Server Error**.
3. Enter settings as desired, as described previously. The possible messages you can customize include:



Message	Description
Invalid Password message	Customize the error message that appears when respondents use an invalid password to access a web form.
Password expired message	Customize the error message that appears when respondents use an expired password to access a web form.
File access error message	Customize the error message that appears when respondents try to access web form pages to which they do not have access (e.g., they mistype URL for your web form).
Web form unavailable message	Customize the error message that appears when respondents attempt to access a web form outside of its availability window.
Maximum submission capacity message	Customize the error message that appears when respondents attempt to access a web form that has already reached the maximum number of submissions.

4. Click the **OK** button. The Server Error page is added to the **Special Pages** container automatically.

Editing Existing Form Pages

There may be times when you need to edit a page that already exists in the web form. There are three ways to edit existing page properties:

- Double click the page node.
- Right click the page node and select **Properties**.
- Click the page node, go to the **View** tab in the Ribbon and select **Properties**.

Once you are in the **Properties** window, you can make the appropriate changes and then click the **OK** button to save your changes. To understand what is on each individual page type, please see the previous sections.

Chapter 5: Remark Web Survey Page Elements

Overview

Chapter 4 covered web form elements, including form properties and pages. Once you have pages on a web form, you need to add other elements. The elements are inserted onto page sections. The use of sections allows you to customize the layout of web forms. This chapter covers the following elements:

- Sections
- Labels
- Images
- Lines
- Multimedia Questions
- Answers
- Buttons
- Headers/Footers
- **Note:** The following sections cover inserting various page elements on a web form. Once elements are inserted, they can be modified. The properties that are available for editing are the same as those you see when inserting an element.

Sections

Sections are containers that hold the page elements (questions, images, labels, etc.) of your web form. The following items can be inserted into sections:

Name	Included Elements
Label	Inserts a text label (e.g., web form directions)
Image	Inserts an image
Line	Inserts a horizontal line
Multimedia	Inserts a multimedia file, such as a video or audio clip
Question	Inserts questions: option button, checkbox, drop-down box (single or multiple responses), textbox/text area
Buttons	Inserts Submit/Next, Back, Reset and Session Pause buttons

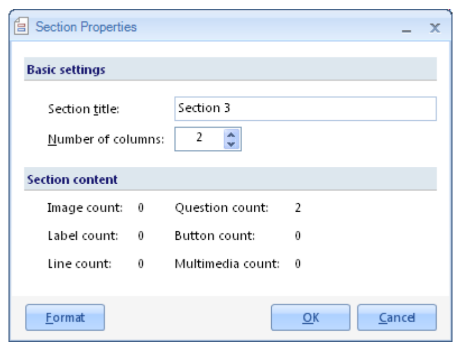
By default, when you create a new page, two sections are added to the page. The first section is where you can start adding elements from the table above. The second section automatically contains web form buttons. The buttons displayed are dependent upon the type of page you are inserting, but can also be modified.

Each section contains a number of columns. The columns are used to assist with web form layout. If you put all of the elements in one column (the default setting), that column spans the width of the page. However, if you separate a section into multiple columns, elements can be placed in specific column locations. Think of the sections as a table. The table has rows and columns within it and you can place items in specific columns. The Remark Web Survey designer displays a light gray table in the HTML Viewer to assist you with layout. These lines are not visible in your published web forms, but can help you place elements in the various rows and columns on the page. (The lines are made visible through the Show HTML Layout Borders checkbox on the View tab of the Ribbon.)

One common use of section columns is to put questions in separate columns on the page so that they span across the page in addition to down the page. You can have two columns of questions, for example, instead of only having one column that goes all the way down the page.

To insert a section

1. With a page highlighted, click the **Insert** tab on the Ribbon and then choose **Section**. (Note you may also insert elements by right clicking the tree view and then clicking **Insert** or **Insert Before**.)



2. If desired, enter a **Section title** for the section (the Section title does not display on the published web form, but is there to help you identify sections more easily as you design web forms).
3. Set the **Number of columns** for the section. One column is typically fine unless you plan to position elements in various columns on the form going across the page.
4. The **Section content** area is for information purposes only.
5. [Optional] Click the **Format** button to add and format lines in between the columns. By default, there is no visible vertical line separator between columns in a section. You can add vertical lines for aesthetic purposes if desired. Once in the **Style Properties**, set the **Column Border Visible** property to **True**, choose a color under **Column Border Color** and then choose the width of the line, in pixels, under **Column Border Width**.
6. Click the **OK** button.

You may now begin adding other elements to the web form.

The following sections describe each of the element types in detail.

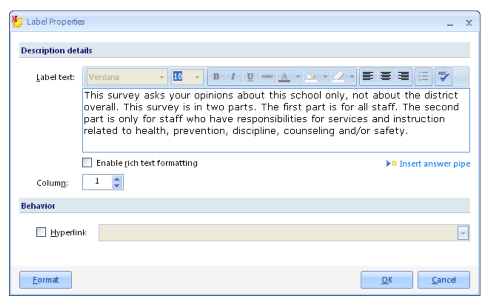
Label Elements

A label element consists of free text that you place on a web form. For example, a label element can be used for a web form title or for providing instructions for filling out a web form. Labels are limited to 10,000 characters. You can customize the following attributes of a label element:

Section	Item	Function
Description Details	Label text	Use the **Label text** area to enter the text for the label. Labels are limited to 10,000 characters.
	Enable rich text formatting	Mark the **Enable rich text formatting** checkbox to display the label in rich text format. Rich text format allows for more style variety as compared to plain text, including changing font sizes, styles and colors. These attributes can be changed for entire labels or individual characters within the label. See Chapter 7 for further details about rich text formatting. Any rich text formatting you apply overrides the general style properties for the element.
	Column	Select the column in which you want the label. The number of columns available is dependent on the Column setting in the section to which the label belongs.
	Insert answer pipe	Click the **Insert answer pipe** link to set up answer piping. Answer piping displays information gathered from a question on a previous page of the form within the label. For example, if you ask for the respondent's name, and his name is John, you can then "pipe" the name into the label to make your form appear more personalized (e.g., "Thank you, John, for taking the time to submit this survey.").

Section	Item	Function
Behavior	Hyperlink	Mark the **Hyperlink** checkbox to turn the label text into a hyperlink. A hyperlink takes the respondent to another question on the web form or to a different web page. When using a web page, enter a fully qualified URL (e.g., http://www.example.com). You should not use a hyperlink in place of question branching if you want to direct respondents to other questions based on how they answer a question. A hyperlink is more useful to display general information you want your respondents to see. Keep in mind that if you are not using rich text formatting, you can also right click anywhere within your label and insert hyperlink text if you do not want the entire label to be a hyperlink. **Note:** If you add a label to a Web Form Complete or Popup Info page, and you mark it to behave as a hyperlink, you also have the option to specify whether to open the hyperlink in a new window.
	Format	Use the **Format** button to format the look of the label. Formatting is covered in detail in Chapter 7.

To insert a label



1. Select an insertion point in the tree view.
2. From the Ribbon, select the **Insert** tab and then click **Label**. The **Label Properties** window appears. (Note you may also insert elements by right clicking the tree view and then clicking **Insert** or **Insert Before**.)
3. Fill in the desired **Label text**.
    - **Note:** When typing label text, you can insert hyperlinks by selecting text, right clicking and choose **Insert Hyperlink** from the menu. You can also insert HTML tags if you are *not* using Rich Text. You should only insert your own HTML tags if you have a firm grasp on the HTML language. Gravic technical support personnel cannot support user-created HTML tags.
4. If desired, utilize the other properties within the **Label Properties** window, as described in the previous table.
5. Click the **OK** button to save the label.

The label is added to the tree view and is visible in the HTML Preview window.

Line Elements

A line element is a horizontal break that can be inserted on a page wherever it is appropriate. When you insert a line, there are no properties to set. However, you can access the line's properties to adjust its style properties by double clicking the line element once it has been added. Formatting is covered in detail in Chapter 7.

To insert a line

1. Select an insertion point in the tree view.
2. From the Ribbon, select the **Insert** tab and then click **Line**. (Note you may also insert elements by right clicking the tree view and then clicking **Insert** or **Insert Before**.) The line is automatically added to the tree view and is visible in the HTML Preview window.
3. [Optional] If you wish to format the line, double click it within the tree view and then click the **Format** button.

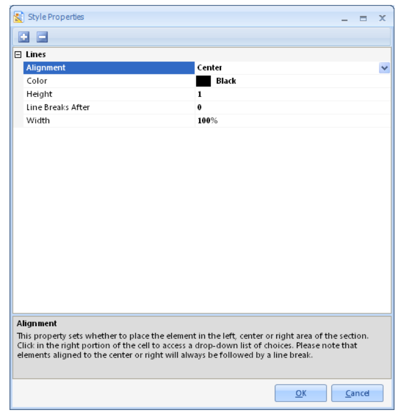


Image Elements

An image element is a graphic that is placed onto a web form in a designated area. Images can be in the GIF (Graphics Interchange Format), JPG/JPEG (Joint Photographic Experts Group) or PNG (Portable Network Graphics) formats.

An image element can be added to the page anywhere that is appropriate. A copy of the image is published to your web server with the rest of the form content. Therefore, there is no need to specify where the image is located on your web server.

The following table lists a summary of the image attributes that can be set:

Section	Item	Function
Description Details	Image path	Click **Select image** to locate the image you wish to add to your web form.
	Alternate text	Use the **Alternate text** item to enter text that is displayed when the mouse is placed over the image on your web form and while the image is loading. Alternate text is useful if you want to create Section 508 compliant web forms. Screen readers read the alternate text.
	Column	Select the **Column** in which you want the image. The number of columns available is dependent on the Column setting in the section to which the image belongs.

Section	Item	Function
Original Dimensions	Width	Use the **Width** setting to resize the image. Enter the number of pixels wide you want the image to be in the **Width** box. Note that changing the size does not alter the original image; it only resizes it in Remark Web Survey.
	Height	Use the **Height** setting to resize the image. Enter the number of pixels high you want the image to be in the **Height** box. Note that changing the size does not alter the original image; it only resizes it in Remark Web Survey.
	Maintain aspect ratio	Mark the **Maintain aspect ratio** checkbox to automatically size the image proportionately as you set either the Width or Height settings. The other setting automatically updates so that your image does not become distorted. Note that changing the size does not alter the original image; it only resizes it in Remark Web Survey.
Behavior	Hyperlink	Mark the **Hyperlink** checkbox to turn the image into a hyperlink. A hyperlink takes the respondent to another question on the form or to a different web page when clicked. When using a web page, enter a fully qualified URL (e.g., http://www.example.com).
	Open external hyperlinks in a new window	Mark the **Open external hyperlinks in a new window** checkbox to have hyperlinks open in a separate (new) window when clicked. This option applies to images that are on Popup Info and Web Form Complete pages only.
	Format	Use the **Format** button to format the image. Formatting is covered in detail in Chapter 7.

To insert an image

1. Select an insertion point in the tree view.
2. From the Ribbon, select the **Insert** tab and then click **Image**. The **Image Properties** window appears. (Note you may also insert elements by right clicking the tree view and then clicking **Insert** or **Insert Before**.)
3. Use the **Select image** link to locate the image you wish to insert into your web form.
4. If desired, enter **Alternate text**. Alternate text is useful for Section 508 compliance; screen readers use this text to read information about the image.

5. If desired, utilize the other properties within the **Image Properties** window, as described in the previous table.
6. Click the **OK** button to save the image.

The image is added to the tree view and is visible in the HTML Preview window.

Multimedia Elements

Multimedia includes video and audio files that you embed into your web forms for respondents to view. For example, suppose you are conducting a survey about a possible new product and want to show respondents a potential advertisement for the new product and then ask questions about it. Respondents can play the video clip (or audio clip) directly from the web form. Supported multimedia formats include: Moving Picture Experts Group (mpeg, mpg, mp3), Audio Video Interleave (avi), QuickTime (mov), Waveform (wav), Real Audio (ram, rm).

- **Note:** Remark Web Survey does not provide functionality to create multimedia files. These files must be created outside of Remark Web Survey. You may then either embed them into the web form or provide a link (URL) to them on an existing website.

You should understand the requirements of the format and player that you are using. In addition, your respondents must have the appropriate viewer and supporting files on their system in order to view the media. You may wish to put instructions on the web form indicating what respondents need to properly view your multimedia file. Note that different browsers have varying capabilities and requirements when it comes to displaying multimedia files. We strongly suggest you test your web form with the browsers you expect to be able to support (e.g., the browsers you expect your respondents to use).

The following table lists a summary of the multimedia attributes that can be set:

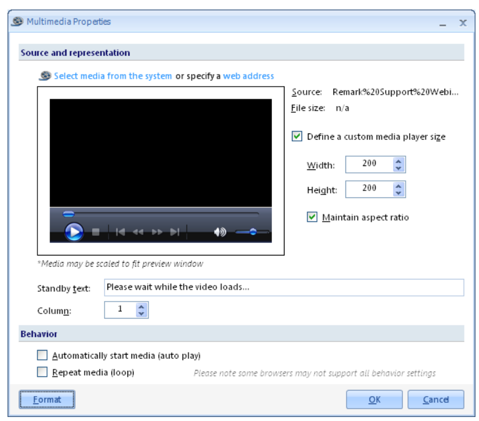
Section	Item	Function
Description Details	Select media from the system	Click **system** to locate the multimedia file you wish to add to your web form.
	Specify a web address	Click **web address** to enter a hyperlink to your multimedia file. The file must reside on an existing website. Please use caution when using URLs to link to files; if the file is moved, the hyperlink stops working. When using a web page hyperlink, enter a fully qualified URL (e.g., http://www.example.com/myfile.avi).
	Source	The **Source** lists the name of the file you have selected. If the name is too long to fit in the window, hover your mouse over the name to see the entire name. **Source** is not editable; go back to **Select media from the system** to choose a new file if needed.

Section	Item	Function
	File Size	The **File Size** lists the size of the selected multimedia file. Note that large files may take longer to load for the respondent. **File Size** is for informational purposes only.
	Define a custom media player size	Mark the **Define a custom media player size** to enter specific dimensions for the media player that plays your video or audio file. Please note that the default dimensions are determined by the resolution of the media file, and that the media player then determines the size needed to play your file. Use caution when altering the size manually, as the video may not display as expected.
Original Dimensions	Width	Use the **Width** setting to resize the media player. Enter the number of pixels wide you want the player to be in the **Width** box. Note that changing the size does not alter the original multimedia file; it only resizes it in Remark Web Survey.
	Height	Use the **Height** setting to resize the media player. Enter the number of pixels high you want the player to be in the **Height** box. Note that changing the size does not alter the original multimedia file; it only resizes it in Remark Web Survey.
	Maintain aspect ratio	Mark the **Maintain aspect ratio** checkbox to automatically size the media player proportionately as you set either the Width or Height settings. The other setting is automatically updated so that the media player does not become distorted. Note that changing the size does not alter the original multimedia file; it only resizes it in Remark Web Survey.
	Standby text	Use the **Standby text** box to enter text that displays while the multimedia file is loading. For example: "Please wait while the video loads. This operation may take a few minutes."
	Column	Select the **Column** in which you want the multimedia file displayed. The number of columns available is dependent on the Column setting in the section to which the multimedia file belongs.

Section	Item	Function
Behavior	Automatically start media (auto play)	Mark the **Automatically start media** checkbox to have the multimedia file begin as soon as the web page is loaded. The respondent does not have to interact with the multimedia file, such as having to click the Play button to begin play.
	Repeat media (loop)	Mark the **Repeat media** checkbox to have the multimedia file continuously play for as long as the web page is on-screen.
	Format	Use the **Format** button to format the image. Formatting is covered in detail in Chapter 7.

To insert a multimedia file

1. Select an insertion point in the tree view.
2. From the Ribbon, select the **Insert** tab and then click **Multimedia**. The **Multimedia Properties** window appears. (Note you may also insert elements by right clicking the tree view and then clicking **Insert** or **Insert Before**.)
3. Use the **system** link to locate the multimedia you wish to insert into your web form. Alternatively, use the **web address** link to enter a URL to a multimedia file on an existing website. If you are entering a URL, Remark Web Survey attempts to validate the link immediately.
4. If desired, enter **Standby text**. Standby text displays while the media player is loading so that your respondents know to wait.
5. If desired, utilize the other properties within the **Multimedia Properties** window, as described in the previous table.
6. Click the **OK** button to save the multimedia file.



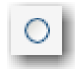
The multimedia file is added to the tree view and is visible in the HTML Preview window.

- **Tip:** Displaying or hiding the multimedia player's controls can be set using the Format button in the Multimedia Properties window. For some browsers you may need to make the size of the player slightly larger in order to completely see the player's controls.

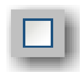
Question and Answer Elements

Question elements represent the questions on a web form. There are four general types of question elements: option buttons (also known as radio buttons), checkboxes, drop-down boxes and single and multiple line textboxes/text areas.

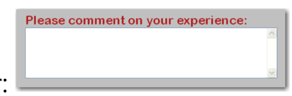
Option Buttons

An option button is a small circle that can be selected or cleared: . When selected it contains a dot. Option buttons are used for multiple choice questions where the respondent is only permitted to choose one response.

Checkboxes

A checkbox is a small square that can be selected or deselected: . When selected it contains a check mark (✓). Checkboxes are used for multiple-choice questions that allow the respondent to choose more than one response for a single question. The responses can be output to one data cell or individual data cells.

Textboxes/Text Areas

A textbox is used for questions that allow the respondent to type an answer: 

. Textboxes are appropriate for open-ended types of questions, or for collecting information about respondents, such as names and addresses. You may select the size of the textbox and whether to limit the length of a respondent's response. A single line write in area is called a textbox. A multiple line write in area is called a text area.

Drop-Down Boxes

A drop-down box is a list in which pre-defined answer choices can be selected: 

. Drop-down boxes can be used for questions that allow single or multiple responses. A drop-down single box only allows the respondent to select one item. A drop-down multiple box allows the respondent to choose more than one item by holding down the Shift or Ctrl key and clicking the desired responses.

Question Element Properties

When setting the properties for a question, there are five areas to be configured: General, Answers, Attributes, Analysis and Database Link. The following tables summarize the question element properties:

General:

The General window allows you to set general properties related to the question.

Property	Function
Question type	Use the **Question type** drop-down list to change the type of question selected: Textbox/Text Area, Checkbox, Option Button or Drop-Down Box.
Allow multiple selections	Mark the **Allow multiple selections** checkbox when using a Drop-Down Box question type to allow respondents to select more than one answer from the pre-defined list. Respondents are able to hold down the Ctrl key while they click answers in the list in order to select them.
Data type	Use **Data type** to select a data type for the question: text or numeric. When exporting data to other programs, data is formatted according to the data type selected.
Field name	Use **Field name** to create a field name for the question, which is used as a column header in the data grid. Field names are also useful if you plan to combine data with Remark Office OMR or Remark Classic OMR; use the same field names in both products. When planning to export data, be sure to follow your export format's guidelines for field naming conventions. In addition, if you are planning to save data to an existing database file, be sure to match your field names in Remark Web Survey to those in the existing database.
Question text	Use **Question text** to enter the text respondents see for the particular question. Question text also appears on select reports when you analyze your data. Question text is limited to 10,000 characters.
Display as rich text	Mark the **Display as rich text** checkbox to display the question text in Rich Text format. Rich text provides more formatting options than plain text (e.g., font sizes, types and colors). Rich text formatting overrides any other formatting options set for the element. See Chapter 7 for further details.
Insert answer pipe	Click the **Insert answer pipe** link to set up answer piping. Answer piping displays information gathered from a different question on the web form within the question text. For example, if you ask for the respondent's name, you can then "pipe" the name into another question's text to make your form appear more personalized (e.g., "John, how do would you rate your latest customer service experience?").
Format	Use the **Format** button to format the question. Formatting is covered in detail in Chapter 7.

Answers:

The Answers window allows you to set and format answer options.

Property	Function
Pre-defined scales	Use the **Pre-defined scales** drop-down list to select an answer scale for the question's answers. You can use this option for Checkbox, Option Button and Drop-Down Box question types. You can select a scale from the Pre-defined scales drop-down list, or edit an existing or create a new scale by selecting the **Edit scales** link. You may also enter a scale into the HTML Labels grid and then click the **Save scale** link to add the scale to your list of reusable scales.
Default value	Use the **Default value** box to put default text in a Textbox/Text Area style question. The text in the text box/text area is automatically be downloaded into the data set for the web form. This feature is often useful for hidden textbox/text area questions where you want to include data in your data file, but do not wish to display it to the respondents. If it is displayed to respondents, they can change the text.
HTML Display	Use the **HTML Display** column to enter a list of answer choices as you want them to appear on the web form. This list controls the display of answer choices to your respondents. HTML Display text is limited to 10,000 characters.
Labels	Use the **Labels** column to enter a list of answer choices as you want them to appear in the resulting data file. Enter one label to correspond with each entry in the HTML Display column. As you type in the HTML Display column, the same information is automatically entered into the Labels column (without any special characters, which are not allowed). You may modify the Labels as desired (the Label text does not have to be the same as the HTML Display text). The following characters are not allowed in the Labels column: "'+,=(). Data labels are limited to 240 characters. For example, you may have answer choices (HTML Display) of Strongly Agree, Agree, Neutral, Disagree and Strongly Disagree. But you may want your data to appear as SA, A, N, D, SD, which you can enter as Labels in the grid.

Property	Function
Values	Use the **Values** column to enter a list of numeric values associated with each Label. Values are used to calculate statistics and are exported to certain file formats, such as SPSS. As you type in the HTML Display column, the Values are automatically entered into the Values column sequentially. You may modify the Values as desired, but each Value must be unique. Note that the Values column is not visible when using the Numeric data type on the **Question Properties|General** window. In addition, values are not used as points awarded when grading tests (points are assigned in the Analysis portion of the properties window or the Grade Wizard).
Insert a choice to be treated as a non-response	The **Insert a choice to be treated as a non-response** property applies to single-selection drop-down lists only. When selected, this property inserts a choice that replaces a non-response. Choose text from the list or enter your own. If respondents leave the question blank, or choose a valid response, then go back and choose this response, the question is treated as blank. If the drop-down list is set as "required" this response does not fulfill the question being answered and respondents are notified that they have not answered a required question. This answer choice is not passed down to Remark Quick Stats as a valid answer when analyzing data.
Access current answer's properties	Use the **Access current answer's properties** link to access each individual answer choice's options.
Limit the number of answers allowed to	Mark the **Limit the number of answers allowed to** checkbox to limit the number of responses allowed for a Checkbox or Drop-Down Box that allows multiple responses. Enter the maximum number of responses allowed in the box. If respondents choose too many responses, they receive an appropriate error message when they submit the web form page. Note that the error message does not appear until the page is submitted.
Max exceeded error message	Click the **Max exceeded error message** link to customize the error message that respondents see when they submit a web form page where they have selected too many answer choices for a question. If you do not customize the message, a default message is displayed.
Randomize answer choices during display	Mark the **Randomize answer choices** checkbox to have the answer choices for the question appear in a random order every time the web form is displayed.

Attributes:

The Attributes window allows you to set more advanced settings for the question.

Section	Property	Function
Attributes and Display Settings	Display question in the data grid	Select the **Display question in the data grid** checkbox to include the question in the data grid when opening or downloading data. **Note:** When you have a data file open, you may also right click a question node and turn on or off Display question in grid. Upon returning to the Respondent grid, the data is refreshed accordingly.
	Mark question as required	Select the **Mark question as required** checkbox to require a question to be answered in order for the web form page to be submitted successfully. If respondents do not answer the required question, they receive a "required question missing" error message upon submitting the page (see below). **Tip:** If using single-selection drop-down lists, use the **Insert a choice to be treated as a non-response** property in the **Answers** window. When selected, this property inserts a choice that replaces a non-response. If respondents leave the question blank, or choose a valid response, then go back and choose this response, the question is treated as blank. If the drop-down list is set as "required" this response does not fulfill the question being answered and respondents are notified that they have not answered a required question. This answer choice is not passed down to Remark Quick Stats as a valid answer when analyzing data.
	Missing error message	Click the **Missing error message** link to customize the error message that respondents see when they submit a web form page without responding to a required question. If you do not customize the message, a default message is displayed.

Section	Property	Function
	Hide question from respondent	Mark the **Hide question from respondent** checkbox to make a question hidden. Hidden questions are not visible and therefore cannot be answered by a respondent. However, a pre-selected response choice is submitted with the web form page. Hidden questions are useful when you want a piece of data to be included in your data file but you do not necessarily want respondents to see the information. For example, suppose you want respondents to answer the same questions about three different products. You could set up three surveys, each with a hidden question within the survey that identifies the product. When downloading the data, you are easily able to see which product the respondent is referencing.
	Treat each answer choice as a separate question item	Mark the **Treat each answer choice as a separate question** checkbox to output the responses from a Checkbox or Drop-Down Box (allowing multiple responses) to separate cells in the data grid. Each possible answer choice occupies a field in the data grid. When downloading data, the cells are filled for those answer choices that respondents selected.
	Mask text input	Mark the **Mask text input** checkbox to mask the text that the respondent types into a Textbox/Text Area question type. This feature is most useful for a password question on a Login page so that others cannot see the password that was used to gain entry to a web form. You can, however, use the mask formatting on any Textbox/Text Area style question to allow the entry of masked information. The text is masked with asterisks (*) as the respondent types information.
	Column	Select the **Column** in which you want the question. The number of columns available is dependent on the **Column** setting in the section to which the question belongs. By placing questions in columns, you can use more of the available viewing space of the web browser. Questions are positioned both across the page and down the page if more than one column is used.

Section	Property	Function
	Answer box height	When inserting a Textbox question, you can increase its height by adding rows, which turns it into a Text Area. A Text Area style question has multiple rows and columns to accommodate more text than a one-line textbox.
	Answer box width	When inserting a Textbox question, you can increase its width by adding columns. Note that the width of a textbox is the same number of characters respondents re able to type (e.g., a textbox with a width of 10 allows 10 characters). If using a Text Area (multiple lines), the **Answer box width** setting does not limit the number of characters that can be typed.
	Answer choice columns	The **Answer choice columns** setting allows you to place answer choices in multiple columns, side-by-side. This feature is useful if you have a large number of answer choices for an option button or checkbox style question. The answer choices are listed across the page in columns instead of in one long column going all the way down the web page.
Behavior	Hyperlink	Mark the **Hyperlink** checkbox to have the question display as a hyperlink. Then type the hyperlink into the box using a fully qualified URL, or select a question or page from the list. Use caution when setting up questions as hyperlinks; respondents navigate away from the current page. However, the hyperlink for questions always display in a new browser window.
	Associate response with the following query parameter	Mark the **Associate a response with a query parameter** checkbox to pass a hidden value into the web form's data dynamically. Enter a name for the query. Then when generating URLs for the web form, append the query parameter name and value to the URL that is sent to respondents.

Section	Property	Function
Input Pattern	Ensure input conforms to this pattern	When using a textbox style question (single line only) you can force a pattern for the characters entered by your respondents by marking the checkbox for **Ensure input conforms to this pattern**. For example, if respondents are entering phone numbers, you may want the pattern to be (000) 000-0000. By default, you can choose **Date**, **Phone** and **Social Security Number** patterns. However, you may also create your own patterns by clicking the down arrow on the textbox and choosing **Edit Input Patterns** (or simply type your pattern in the box and click the Save icon). In the **Input Pattern Editor** box, click the **New** button and then type your pattern in the box. When entering a pattern, use a 0 to represent numeric characters, an A to represent alpha characters and an X to represent alphanumeric characters. For example, if you wanted your pattern to be a phone number without the parentheses, you might use: 000-000-0000. When respondents enter their phone numbers, they need to format it like: 123-456-7890 or an error occurs *when they submit the page*. You should tell respondents the pattern you are expecting either in your question text or in a label near the question. Note that if you want the literal characters 0, A or X to appear in your pattern, you need to enclose them in quotations (e.g., "X"). Please note that input patterns are not validated until the page is submitted. In addition, there is no pattern to require only numeric or textual information. You must specify a specific number of characters.
	Input pattern error message	If a respondent submits a page without following the appropriate textbox formatting the following error appears: "The response does not conform to the specified input pattern for this question." If you want to customize this error, click the **Input pattern error message** link and adjust the text (includes the ability to format the text).

Analysis:

The Analysis window allows you to set properties for grading tests and tabulating surveys.

Property	Function
Include question in grading process	Mark the **Include question in grading process** checkbox to indicate the question should be graded in Remark Quick Stats. If this option is not selected the question is not included in a grade operation.
Treat as a subjective question	Mark the **Treat as a subjective question** checkbox to include subjective points when grading a test. Subjective questions contain a point value to be added to the objective portion of the test that Remark Web Survey automatically calculates. The question must be of the numeric data type to be used as a subjective question.
Include question in tabulation process	Mark the **Include question in tabulation process** checkbox to tabulate responses from the question in Remark Quick Stats. If this option is not selected the question is not included in a survey tabulation operation.
Points awarded for correct response	Use the **Points awarded for correct response** item to select how many points to award for correct answers when grading a test.
Points awarded for incorrect response	Use the **Points awarded for incorrect response** item to select how many points to award or subtract for incorrect answers when grading a test.
Points applied if question is skipped	Use the **Points awarded for incorrect response** item to select how many points to award or subtract if a question is not answered when grading a test.
Missing value	Use the **Missing value** textbox to enter a value Remark Web Survey uses when a question is not answered or characters appear in the response that do not match the pre-defined scale. Missing data is anything that doesn't match the Labels you defined for the question, including blank responses. You can set the missing value on a question by question basis. The default missing value is -1. Only numeric characters are allowed. Missing values can be reported in Remark Quick Stats and are exported to other applications when saving data.
Mark question as the respondent identifier in the analysis	Select the **Mark question as the respondent identifier in the analysis** checkbox to include the question's responses as an identifier on various reports. For example, if you are grading student exams and want the students' ID numbers or names to be on analysis reports, you can mark the corresponding question on the web form as a respondent identifier. The item must be "ungraded" in order to be used as a respondent identifier question.

Database Link:

The Database Link window allows you to establish a link to an external database so that you can extract information from that database. It provides an easy way to get external data into your web form's data for analysis. To use this feature, you link a question on the web form to an existing database. Once the data a respondent enters is found in the linked database, you can replace it with other information from that database (called Append fields). When the data are downloaded, Remark Web Survey looks for the data that was entered as the question's response in the linked database field. Remark Web Survey then outputs any selected "append" fields in the data file. If the data are not present in the database field, Remark Web Survey fills the data cell with the response that was entered, but does not display any of the append field information (which comes directly from the linked database) because the initial response was not found in the database.

For example, suppose you ask respondents for an identification number on a web form. In an external database, you have that identification number listed along with other information about each respondent (perhaps their name, email address or other demographic information). Using the Database Link feature, when the data for the web form are downloaded, Remark Web Survey looks up each identification number in the external database and then returns the associated demographic information from the database to your Remark Web Survey data file. You can have multiple Append fields if desired.

The following table describes the database link properties:

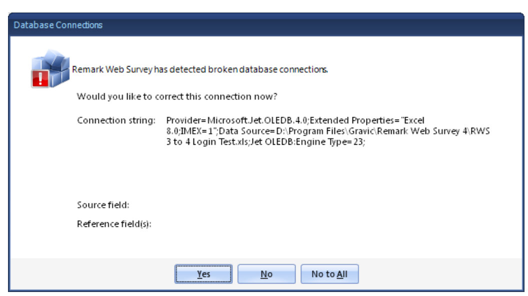
Property	Function
Enable database link	Mark the **Enable database link** checkbox to link a question to an existing database. This feature allows you to add fields to the Remark Web Survey data by outputting information from other field(s) within the database.
Database connection settings	Click the **Database 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.

Property	Function
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.
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 are verified against the values in this database field. If the response is found in the database field, Remark Web Survey outputs the Append value(s). If the answer is not found in the database field, Remark Web Survey leaves 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.

To use the Database Link feature, first follow the steps below to insert a question. Then click **Database link** in the Question **Properties** window and enter the information as outlined above.

If you move the database to a new location or rename it, the link is broken. When this happens two things can occur:

1. When opening a web form with a broken database connection, Remark Web Survey detects the broken connection and displays a warning screen (if this setting is turned on in the Program Options). Click **Yes** to repair the connection (e.g., reconnect to the right database). Click **No** to leave the broken connection as is for this sesion and not perform any database linking at this time. Click **No to All** when using multiple append fields and you do not desire to utilize database linking at this time.



2. Under the **Tools** tab on the Ribbon there is a button called **Sync with Database**. When you set up **Database Link**, you tell the software where to find your linked database. If the database is moved or renamed, use the **Sync with Database** option to quickly relink the database to your web form. When you select this option, a

window appears where you can select the database to re-establish the link. This option is available when you are in the Data Viewer view.

Piping Extra Fields of Data Using the Login Page

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 is 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 are automatically 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:

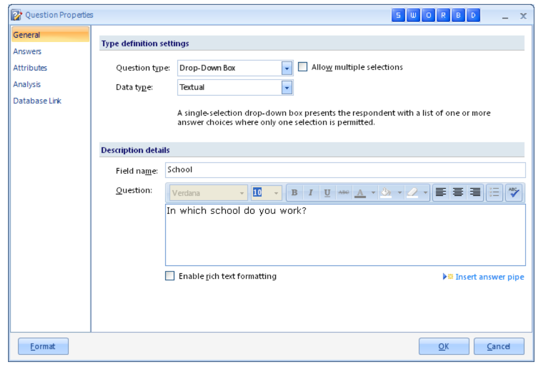
Property	Function
Enable database link	Mark the **Enable database link** checkbox to link a question to an existing database. This feature allows you to add fields to the Remark Web Survey data by outputting information from other field(s) within the database.
Database connection settings	Click the **Database 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.

Property	Function
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.
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 are verified against the values in this database field. If the response is found in the database field, Remark Web Survey outputs the Append value(s). If the answer is not found in the database field, Remark Web Survey leaves 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.

To insert question elements

1. Select an insertion point in the tree view. You must be within a section to insert a question.
2. From the Ribbon, select the **Insert** tab and then click **Question**. The **Question Properties** window appears.



3. You must select a **Question type** and if using Checkbox, Option Button or Drop-Down Box style questions, you must enter the answer choices on the **Answers** window.
4. If desired, utilize the other properties within the **Question Properties** window, as described previously.
5. **Note:** When typing question text, you can insert hyperlinks by selecting text, right clicking and choose **Insert Hyperlink** from the menu.
6. Click the **OK** button to save the question.

The question is added to the tree view and is visible in the HTML Preview window.

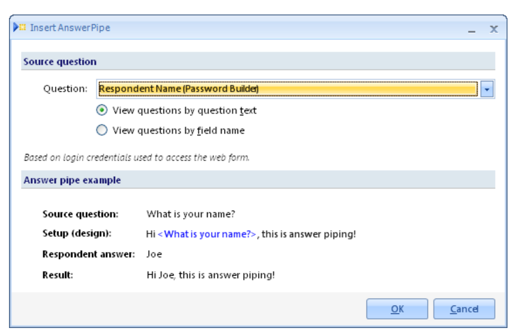
Answer Piping

Displaying the answer to one question in the text of another subsequent question, label or answer is called answer piping. For example, if you ask for the respondent's name, you can then "pipe" the name into another question's text to make your form appear more personalized (e.g., "John, how would you rate your latest customer service experience?"). Note that in order to use answer piping, the question from which you are drawing the answer must be on a previous page from the question or label where you are adding the answer pipe.

- **Note:** Using answer piping in answer elements is covered later in this chapter.

To use answer piping in a question

1. Select an insertion point in the tree view. You must be within a section to insert a question.
2. From the Ribbon, select the **Insert** tab and then click **Question**. The **Question Properties** window appears.
3. You must select a **Question type** and if using Checkbox, Option Button or Drop-Down Box style questions, you must enter the answer choices on the **Answers** window.

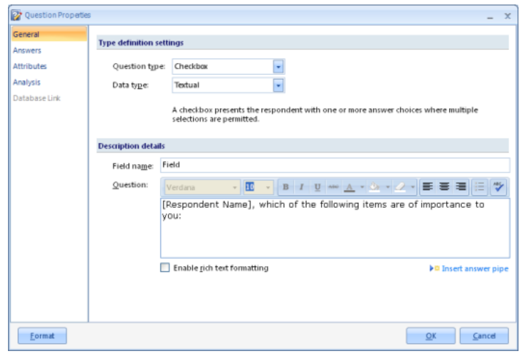


4. If desired, utilize the other properties within the **Question Properties** window, as described previously.
5. Click the Insert answer pipe link.
6. Under **Source Question**, choose the **Question** that contains the answer you wish to pipe into the current question. Remember that the source

question must be on a different page than the current question. You may also pipe information from the Login page, including Database Lookup fields, if you set that up in your Login page (see previous section for more details). When selecting questions, you may display the question by question text or field name using the radio buttons for each on the screen. The **Answer Pipe example** window shows you how the question appears in the properties window and on the actual web form.

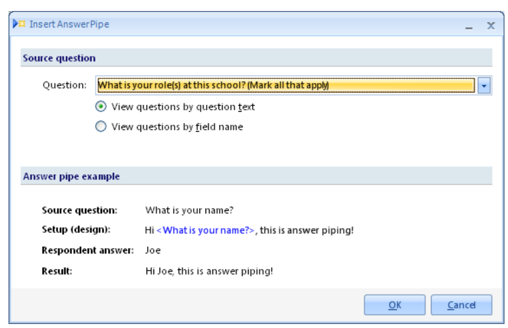
- **Note:** If using a Login page, you can use the Username, Name and Email fields from the Login page as source questions.

7. Click the **OK** button to return to the **Question Properties** window. You see the question text from the question you inserted as an answer pipe. This text is a placeholder for the piped answer. You may not change the text. However, you may format the text. For example, you can click within the pipe placeholder, turn on rich text formatting and apply font characteristics to the text. You may also add punctuation or other text around the pipe placeholder. If you need to delete the answer pipe, click anywhere inside of the pipe text and press the **Delete** key on your keyboard. To edit an existing answer pipe, click the placeholder text, click **Insert answer pipe** and then choose a new question. The old answer pipe question text is replaced with that of the new question.

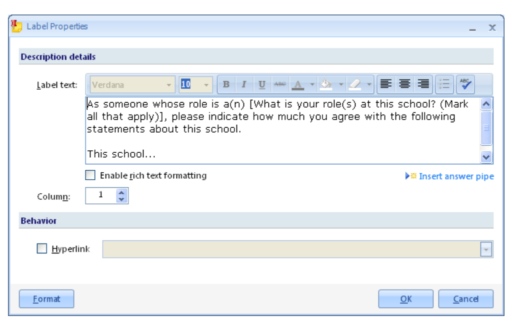


8. Click the **OK** button to save the question.

To use answer piping in a label



1. Select an insertion point in the tree view. You must be within a section to insert a label.
2. From the Ribbon, select the **Insert** tab and then click **Label**. The **Label Properties** window appears.
3. Enter and format the **Label text**.
4. If desired, utilize the other properties within the **Label Properties** window, as described previously.
5. Click the Insert answer pipe link.
6. Under **Source Question**, choose the **Question** that contains the answer you wish to pipe into the current label. Remember that the source question must be on a different page than the current label. You may also pipe information from the Login page, including Database Lookup fields, if you set that up in your Login page (see previous section for more details). The **Answer Pipe example** window shows



you how the label appears in the properties window and on the actual web form.

7. Click the **OK** button to return to the **Label Properties** window. You see the question text from the question you inserted as an answer pipe. This text is a placeholder for the piped answer. You may not change the text. However, you may format the text. For example, you can click within the pipe placeholder, turn on rich text formatting and apply font characteristics to the text. You may also add punctuation or other text around the pipe placeholder. If you need to delete the answer pipe, click anywhere inside of the pipe text and press the **Delete** key on your keyboard. To edit an existing answer pipe, click the placeholder text, click **Insert answer pipe** and then choose a new question. The old answer pipe question text ia replaced with that of the new question.
8. Click the **OK** button to save the label.

Once the answer piping is applied to your web form, respondents answer the "source" question, and then when they arrive at the question or label in which you included the answer pipe, they see the answer they typed into the source question.

Piping Information into Other Web Forms and URLs

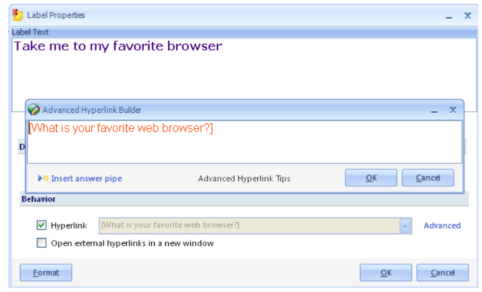
You can use an Advanced link next to the hyperlink address box, wherever hyperlinks are supported, to access the **Advanced Hyperlink Builder**. Here you can create hyperlink addresses that include answer pipes. This feature allows you to pipe one form's responses into another (e.g., chain web forms 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 launches and the name and address information are automatically 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.

Query Parameters

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 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.

For example, suppose you are doing course evaluations. You could set up a hidden textbox question with a Query Parameter called *Instructor*. When sending out URLs to respondents, you could append the Query Parameter name plus an instructor's name to the URL. When students fill out the evaluation, the instructor they are evaluating is listed in the data. However, the students do not have to enter this information, thus reducing the chance of error (you probably do want to let them know the instructor they are evaluating when you send them invitations to fill out your web form). You can even take this one step further if students have a web portal. Students could login to the portal and have several course evaluation URLs listed with an instructor name. Each URL would have the instructor Query Parameter included, but the value would be for different instructors. Students could click each URL to rate the various instructors, but would not need to type in the instructor's name each time. When you receive students' data, you would automatically know which instructor was being evaluated. (In this scenario you would need to let them know which instructor they are evaluating in your portal.)

This functionality is similar to using default fill values in textboxes, but allows you to change the default fill on the fly without changing the web form.

The syntax for the URL when using Query Parameters is as follows:

http://www.example.com/cgi-bin/rws5.pl?FORM=formname&queryparametername=queryparametervalue

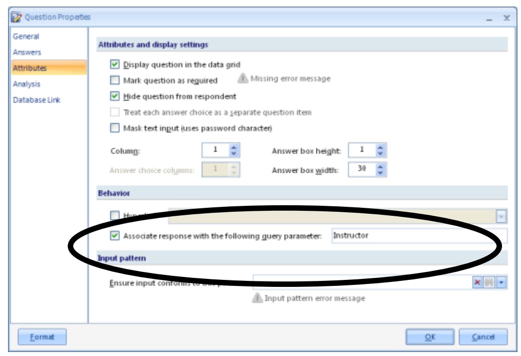
In the course evaluation example above, the URL would look like the following:

http://www.example.com/cgi-bin/rws5.pl?FORM=formname&Instuctor=JohnDoe (where John Doe is the name of the instructor being evaluated)

In addition, you can connect a query parameter to a database to retrieve the query parameters. This feature is covered below in the email instructions, after the general information about setting up query parameters.

To use Query Parameters

1. Create a textbox style question by clicking **Insert** on the Ribbon and choosing **Question**.
2. For Question type, select Textbox/Text Area.
3. [Optional] Enter the desired **Field Name**.
4. [Optional] Enter the desired **Question Text**.
5. Click the **Attributes** link in the left side of the window.
6. In the Behavior section, mark the checkbox for Associate response with the following query parameter.
7. Enter a name for the query parameter in the associated textbox. We suggest keeping the name short as it becomes part of the URL in your web form link.
    - **Note:** The following words are reserved and cannot be used to name query parameters: FORM, UID, USER, PWD, PWDE, POPUPINFO, ENC.



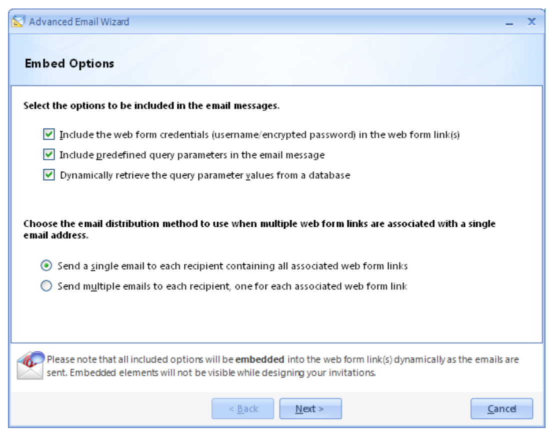
8. Modify any other settings as desired for the question.
9. Click the **OK** button to save the question.
10. Once the form is published, you can to send out URLs to respondents that include the desired Query Parameter value. This value is included in each respondent's data file. If you send the URLs out independently of Remark Web Survey, you need to manually put the query parameter value into each email (or merge it). If you send the URLs via Remark Web Survey's email center, you can use advanced options to append the query parameter value.
    - **Tip:** The Email Center is covered in detail in Chapter 9. You may wish to review this section and gain a full understanding of the Email Center before you attempt to use it to send Query Parameters.

In addition to manually inputting query parameter values, you can obtain the values from a database. 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 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 automatically inserts the course name and instructor name to the URL based on each student's email address. You 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.

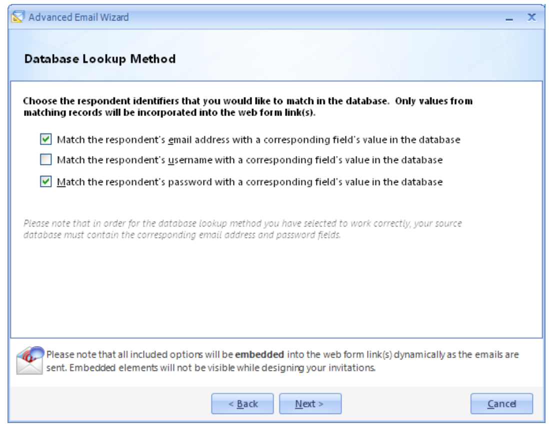
To send emails using Query Parameters

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.

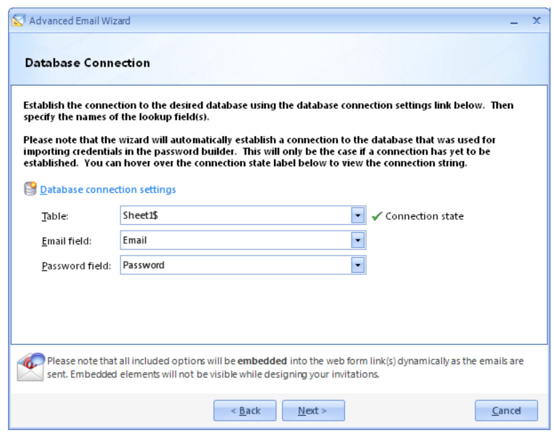


5. Mark the Include predefined Query Parameters in the email message checkbox.
6. [Optional] To use new database linking feature, mark the **Dynamically retrieve the values from a database** checkbox. This option tells the software that you are going to utilize an external database to populate your Query 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 is 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. If you are retrieving query parameters from a database, the **Database Lookup Method** window appears where you can choose how you want to identify respondents (if you are not using this method, skip to step 16): 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 connects 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.



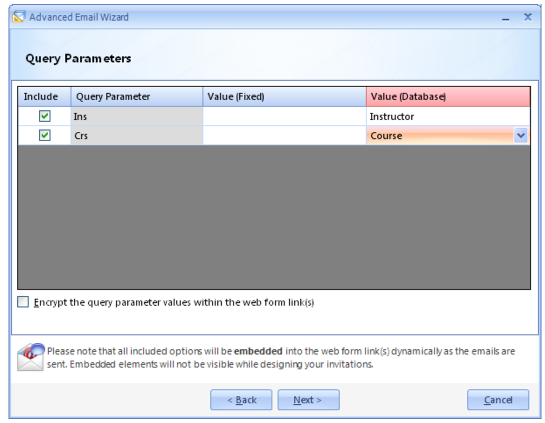
11. The following items can be configured:

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.

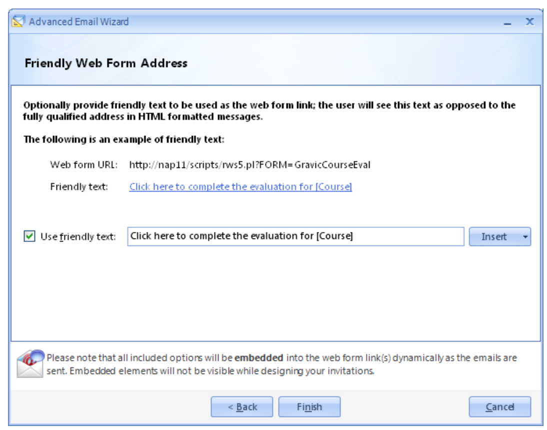
Property	Function
DSN	If using an ODBC connection, choose the DSN from the **DSN** drop-down list. Mark whether it is **Directory based** or **DSN based**.
Username	If your database requires a login, enter the **Username**.
Password	If your database requires a login, enter the **Password**.
Connection 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.

12. 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**.
13. Click the **Next** button to continue.
14. 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 when sending this email.

15. To retrieve values from a database: 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 th ose fields respectively as database Query Parameter values for the Query Parameters you have set up.



16. To enter values: Manually enter the desired value in the **Parameter Value** box. In our course evaluation example, you would enter the instructor's name as the Parameter Value.
17. [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 encrypts the value you insert for each Query Parameter so that respondents cannot decipher it in the web form invitation/reminder URL (web form link).
18. Click the **Next** button to continue.
19. [Optional] Use the **Use Friendly Text** 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 are still encrypted when using a friendly web form address (the base of the address is not 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 is 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.

20. 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 Chapter 9 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 are sent, prior to sending, to ensure the web form links have been properly built.
    - **Tip:** You could build a "cover" page with instructions for completing the form. On that cover page could be the hidden Query Parameter question. The value for that Query Parameter could then be passed to a label through Answer Piping on the header of every page. In the course evaluation example described previously, the header could display the instructor being evaluated, which would be piped from the Query Parameter on the first page.

Answer Element Properties

When you insert a question on the web form, you can set up the answer choices, which become answer elements in the tree view. The answer elements can be further defined through the **Answer Properties** window. You can access this window in one of three ways:

- Double click an answer element in the tree view.
- Right click an answer element in the tree view and select **Properties** from the menu.
- Select an answer element in the tree view and then select **Properties** from the **View** tab in the Ribbon.

The following items can be customized through the **Answer Properties** window:

Property	**Function**
Field name	Use the **Field name** to create a name for the answer, which is used as a column header in the data grid. Setting field names for individual answers is most useful when using Checkbox or Drop-Down Box style questions that output the answers in separate data grid cells. This feature allows you to give each answer choice a unique field name for clarity and/or matching data to an existing external database or file. When planning to export data, be sure to follow your export format's guidelines for field naming conventions. In addition, if you are saving data to an existing database file, be sure to match your field names in Remark Web Survey to those in the existing database.
HTML display	Use the **HTML Display** column to enter the text for answer choices as you want it to appear on the web form. This list controls the display of answer choices to your respondents. HTML Display text is limited to 10,000 characters.

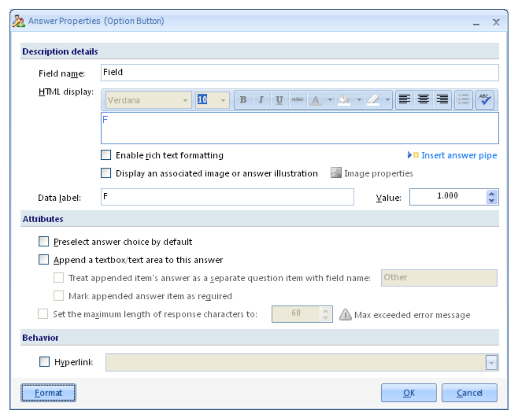
Property	Function
Insert answer pipe	Click the **Insert answer pipe** link to set up answer piping. Answer piping displays information gathered from a different question on the web form within the answer text. For example, if you ask someone who just purchased a new car the color they chose, you can then “pipe” the color into another question’s answer to make your form more personalized (e.g., ”How much did the color *silver* influence your decision to purchase this car?”).
Enable rich text formatting	Mark the **Enable rich text formatting** checkbox to display the answer text in Rich Text format. Use the box above the checkbox to format the text. Rich text provides more formatting options than plain text (e.g., font sizes, types and colors). Rich text formatting overrides any other formatting options. See Chapter 7 for further details.
Display an associated image or answer illustration	To use an image as part of your answer display to respondents, mark the **Display an associated image or answer illustration** checkbox. Then click the image icon next to the box and choose the desired image file. Supported file formats include JPG/JPEG, GIF and PNG. Using images as answer items is described in greater detail in
Data label	Use the **Data label** box to enter the answer choice as you want it to appear in the resulting data file. The HTML Display is what the respondents see when filling out the form and the Label is what goes into the data set behind the scenes. The following characters are not allowed for answer data labels: “'+,=(). Data labels are limited to 240 characters.
Value	Change or enter the numeric **Value** associated with the Label. Values are used to calculate statistics and are exported to certain file formats, such as SPSS. When you are creating questions, the Values are automatically entered into the Values column sequentially as you type in the HTML Display and Labels columns. You may modify the Values as desired, but each answer choice’s value should be unique. When grading tests, values are not used to calculate points earned (this is handled in the “Analysis” section of the question properties window). Note that the Values property is not visible when using the Numeric data type on the **Question Properties|General** window.
Preselect answer choice by default	Mark the **Preselect answer choice by default** checkbox to preselect the selected answer choice when the web form page is displayed to the respondent. Respondents can still choose another answer choice, but the preselected answer choice is automatically selected if they do not choose a different answer.

Property	Function
Append a textbox/text area to this answer	Mark the **Append a textbox/text area to this answer** checkbox to automatically append a textbox to an answer choice. This option is most useful when you have a multiple choice style question that allows for an "other" option (e.g., select your favorite color: Red, Blue, Green, Other). The textbox/text area allows respondents to write in another response. You can have just one textbox/text area or multiple textboxes/text areas per question. When the data are collected for the question, the typed text is placed in the data cell in place of the word "other" (or whatever word you use to define that answer choice). You can also enter default fill in the appended other box that respondents see. They can type over this text; if they do not, it is passed down to your data.
Treat appended item's answer as a separate question with field name	Mark the **Treat appended item's answer as a separate question with field name** checkbox to have the "other" text entered into the textbox be its own data field. Without this option marked, the data replaces the answer choice that was defined. For example, if the last option button for the question is "Other", treating the appended textbox as a separate question gives you one data cell with the word "Other" and a separate data cell with the write-in text from the respondent.
Mark appended answer item as required	Mark the **Mark appended answer item as required** checkbox to ensure that if respondents choose the "Other" textbox's answer choice, they must also fill something in for the appended textbox. If they select the option for "Other" but do not put something in the appended textbox, they receive an appropriate error message when they submit the page.
Set the maximum length of response characters to	Mark the **Set the maximum length of response characters to** checkbox to limit the number of characters allowed for a Textbox/Text Area style question. Enter the maximum number of characters allowed in the box. For a textbox (single line of free text) respondents are not able to enter more characters than you allow. For a text area (multiple lines of free text), respondents receive an appropriate error message when they submit the web form page if they entered too many characters.
Max exceeded error message	Click the **Max exceeded error message** link to customize the error message that respondents see when they submit a web form page with either too many answer choices selected (Checkbox or Drop-Down Box style question) or too much text entered (Text Area style question). If you do not customize the message, a default message is displayed.

Property	Function
NA label	If your question has a “Not Applicable” (NA) answer choice and you do not want the NA responses to be included in the Remark Quick Stats statistics (e.g., means), mark the **NA label** checkbox for the appropriate answer choice. Only one answer can be selected as NA per question. In the Remark Quick Stats preferences you can choose whether to include or exclude the NA responses.
Hyperlink	Mark the **Hyperlink** checkbox to have the answer display as a hyperlink. Then type the hyperlink into the box using a fully qualified URL or select a question or page from the list. Use caution when setting up answers as hyperlinks; respondents navigate away from the current page. However, the hyperlink for answer choices always displays in a new browser window.
Format	Use the **Format** button to format the style of the answer choice. Formatting is covered in detail in Chapter 7.

To insert answer elements

1. Select an insertion point in the tree view. You must be on a question or answer element to insert an answer element.
2. From the Ribbon, select the **Insert** tab and then click **Answer**. The **Answer Properties** window appears.
3. None of the properties in the **Answer Properties** window are required. You typically want to fill in the **HTML Display**, **Label** and **Value**, but all properties are optional.
4. Click the **OK** button to save the answer.



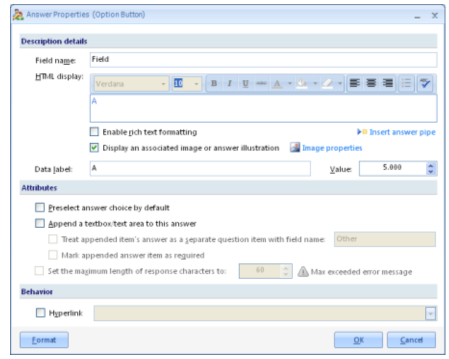
The answer is added to the tree view and is visible in the HTML Preview window.

Using Images as Answer Elements

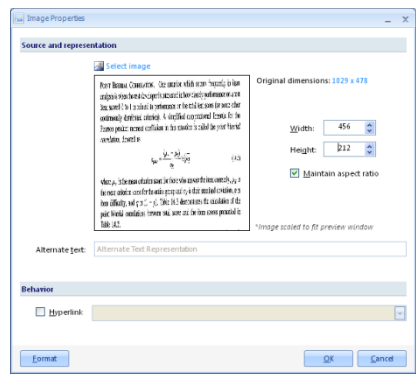
As described in the previous table, you may use an image as part of the answer that you display to respondents. For example, suppose you want to display a product image or mathematical equation; you could insert an image as part of the answer choice. Images can be in the JPG/JPEG, GIF or PNG formats. The image can be placed to the right, left, top or bottom of the HTML Display text (if you have entered HTML Display text).

To insert images as answer elements

1. Select an insertion point in the tree view. You must be on a question or answer element to insert an answer element.



2. From the Ribbon, select the **Insert** tab and then click **Answer**. The **Answer Properties** window appears.
3. If desired, type in a **Field Name** and the **HTML Display** text.
4. Mark the checkbox for Display an associated image or answer illustration.
5. Click the image icon next to the checkbox.
6. Click the **Select image** hyperlink.
7. Choose the desired image. Images can be in the following formats: JPG/JPEG, GIF, PNG.



8. The original dimensions are displayed. If you wish to adjust the dimension, enter new pixel values in the **Height** and **Width** boxes. If you want the aspect ratio to remain the same between width and height, mark the **Maintain aspect ratio** checkbox. As you adjust width or height, the other adjusts automatically. Please note that making adjustments to the size within Remark Web Survey does not affect the original image.
9. If desired, enter alternate text in the **Alternate text** textbox. This text appears while the image is loading and when you hover the mouse over the image, and can be read by screen readers (this is useful if you want web forms to be Section 508 compliant for handicapped persons).
10. If desired, mark the checkbox for **Hyperlink** and then enter a hyperlink (fully qualified URL) in the associated textbox. A hyperlink is applied to your image, meaning that if someone clicks the image, they are redirected to another web page in a new browser window. Please note that it is possible to add hyperlinks for the image element as well as the answer element as a whole (on the previous screen). The hyperlink applied to the image element only takes effect when the image is clicked. The hyperlink applied to the answer element only takes effect when the HTML Display text is clicked.
11. Click the **OK** button to save the image element information.
12. Continue defining any other desired properties for the answer element.
13. Click the **OK** button to save the answer element.

The answer is added to the tree view and is visible in the HTML Preview window. In the tree view, you see the name of the image file you selected. If you wish to format the position of the image (left, right, top or bottom of the HTML Display text), double click the answer node in the tree view and then click the **Format** button. For **Image Position** select **Left**, **Right**, **Top** or **Bottom**.

- **Note:** You may need to adjust the answer element's line break property to get the image and HTML Display text to appear just as you wish.

Answer Piping with Answer Elements

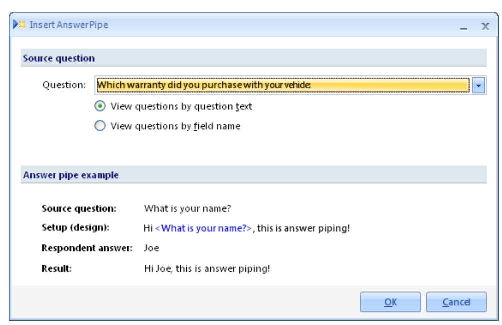
Answer elements can also have answer pipes within them. Displaying the answer to one question in the text of another subsequent question, label or answer is called answer piping. For example, suppose you are surveying new car owners. You ask a question on page one about the color of the car they purchased. Then on page two, you ask a question about what influenced their decision to purchase the car. One of your answer choices could include the color of the car they purchased. You would use answer piping to "pipe" in the color they entered on page one of the survey. Note that in order to use answer piping, the question from which you are drawing the answer must be on a previous page from the answer where you are adding the answer pipe. You may also use answer piping as a default fill for a textbox answer.

To use answer piping in an answer

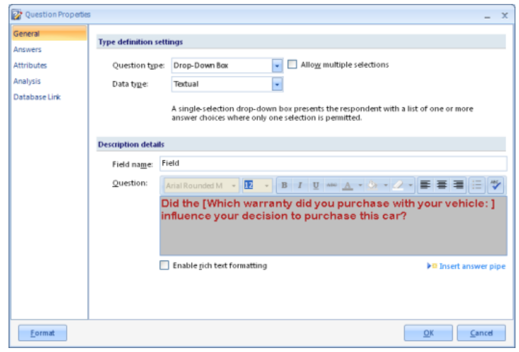
1. Insert a question or individual answer element, as described in previous sections.
2. Go to the answer item to which you wish to add the answer pipe. You can get to the answer item's properties either through the question properties window or the answer properties window:

Question Properties Window	Answer Properties Window
a. Go to the **Answers** portion of the Properties window. b. In the answers grid, select the answer to which you wish to add the answer pipe. c. Click Access current answer's properties. d. Click **Insert answer pipe**.	a. Click Insert answer pipe.

3. Under **Source Question**, choose the **Question** that contains the answer you wish to pipe into the current answer. Remember that the source question must be on a different page than the current question. When selecting questions, you may display the question by question text or field name using the radio buttons for each on the screen. The **Answer Pipe example** window shows you how the answer appears in the properties window and on the actual web form.
    - **Note:** If using a Login page, you can use the Username, Name and Email fields from the Login page as source questions.



4. Click the **OK** button to return to the **Answer Properties** window. You see the question text from the question you inserted as an answer pipe. This text is a placeholder for the piped answer. You may not change the text. However, you may format the text. For example, you can click within the pipe placeholder, turn on rich text formatting and apply font characteristics to the text. You may also add punctuation or other text around the pipe placeholder. If you need to delete the answer pipe, click anywhere inside of the pipe text and press the **Delete** key on your keyboard. To edit an existing answer pipe, click the placeholder text, click **Insert answer pipe** and then choose a new question. The old answer pipe question text is replaced with that of the new question.

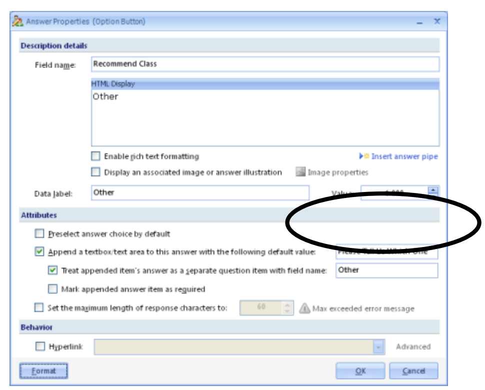


5. Click the **OK** button to save the answer.

Once the answer piping is applied to your web form, respondents answer the “source” question, and then when they arrive at the question containing the answer in which you included the answer pipe, they see the answer they typed into the source question as part of the answer text. 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 is 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 now see the default fill text in the browser view.



Question Tables

Questions that have the same answer set and/or are of the same type (e.g., all option buttons) can be placed in a question table. A question table places the questions in table format as opposed to one after the other down the page. For a question and answer set to be the same, the number of answer choices must be the same, and the HTML Display choices must be identical.

When it comes to question tables, there are two concepts:

- Placing questions with the same answer choices in a table format
- Placing questions with the same answer choices in multiple tables, also known as side-by-side tables

These two concepts are described separately.

Table Formatting

When you have questions that use the same answer scale, you may wish to place them in a table format instead of one by one down the web page. Only questions of the same type can be placed in a table format (e.g., all option buttons or all checkboxes).

- **Note:** This section discusses inserting and modifying question tables, including question text, answer items and so forth. It does not cover the style properties that are available for question tables (e.g., shading rows and columns, fonts, table alignment, etc.). Please see Chapter 7 for detailed information about the options that are available when formatting question tables.

The following example shows option button style questions in a table:

This school...	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
is a supportive and inviting place for students to learn.	○	○	○	○	○
sets high standards for academic performance for all students.	○	○	○	○	○
promotes academic success for all students.	○	○	○	○	○
involves most parents in school events or activities.	○	○	○	○	○
handles discipline problems fairly.	○	○	○	○	○
is a supportive and inviting place for staff to work.	○	○	○	○	○
provides adequate counseling and support services for students.	○	○	○	○	○
is a safe environment for students.	○	○	○	○	○
is a safe place for staff.	○	○	○	○	○

The following example shows the same option button style questions, but not in a table:

This school...

is a supportive and inviting place for students to learn.

○ Strongly Agree
○ Agree
○ Neither Agree or Disagree
○ Disagree
○ Strongly Disagree

sets high standards for academic performance for all students.

○ Strongly Agree
○ Agree
○ Neither Agree or Disagree
○ Disagree
○ Strongly Disagree

promotes academic success for all students.

○ Strongly Agree
○ Agree
○ Neither Agree or Disagree
○ Disagree
○ Strongly Disagree

The following criteria must be met in order to place questions in tables:

- Questions must be of the same type (e.g., all option button responses)
- Questions must have the same set of answer choices

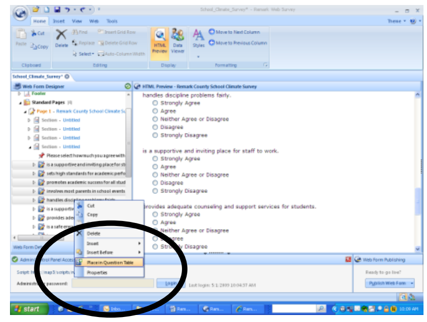
- Questions may not have the option to treat each answer choice as a separate question enabled

There are two ways you can place questions in a table format:

- Placing existing questions in a table by right clicking the questions and choosing Insert into question table
- Inserting a question table from the Ribbon

To format existing questions

1. Select the questions you wish to place in a table. You can multi-select questions by holding down the **Ctrl** or **Shift** key as you click them in the tree view.
2. With all questions selected, right click the mouse and choose **Place in Question Table** from the menu.
    - **Note:** Do not release the **Ctrl** or **Shift** key until after you right click the mouse.

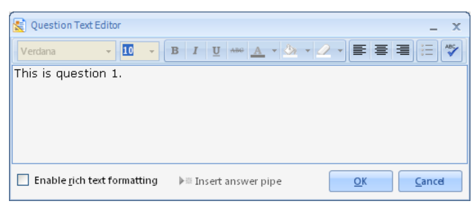


The questions are automatically placed into a table. You may edit the table by clicking the **Question Table** node in the tree view. The **Question Table Properties** window appears.

To format questions in a table using the ribbon

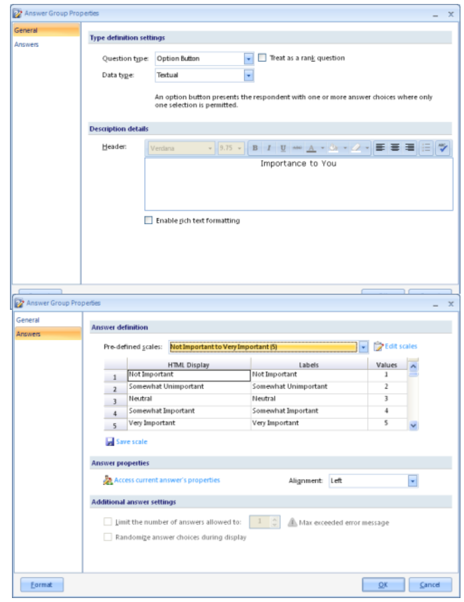
When inserting a question table, you add the questions and answer choices using the **Question Table Properties** window.

1. From the **Insert** tab in the Ribbon, select the down arrow on the **Question** button and click **Question Table**. The **Question Table Properties** window opens.
2. Click the **Insert Row** button to insert a row that holds your question text. The **Question Text Editor** appears.
3. In the **Question Text Editor** window, type the question text for the question and format it as desired. Question text is limited to 10,000 characters.
    - **Note:** Answer Piping is allowed in questions that are placed in Question Tables using the **Insert pipe** link. It is used the same as when inserting single questions. You are not be able to add the piping until after you add the question (click the question text to return to the Question Properties window for editing).



4. Repeat steps 2 and 3 to insert more questions if desired.

5. To insert answer items for the questions, click the **Insert Answer Group Column** button. The answer columns represent the answer choices for each question. The answer column applies to all questions within the table (although you can remove answer items for individual questions). If you are simply formatting questions with the same scale in a table, you only insert one answer column.



6. In the **Question type** drop-down box choose the type of question you are inserting: Textbox/Text Area, Checkbox, Option Button, Drop-Down Box.
7. Choose the **Data type**: Textual or Numeric.
8. If desired, enter a **Table Header**. The table header is placed above the answer choice labels in the table and is optional. Table Headers are limited to 10,000 characters.
9. Click the **Answers** item on the left of the **Answer Group Properties** window.
10. If using a Checkbox, Option Button or Drop-Down Box question type, enter the **HTML Display**, **Labels** and **Values** (or select a pre-defined list).
11. If desired, utilize any of the other properties in the **Answer Group Properties** window.
12. Click the **OK** button to insert the answer group.
13. Click the **OK** button again to insert the question table.

The questions are automatically placed into a table. You may edit the table by clicking the **Question Table** node in the tree view. The **Question Table Properties** window appears.

- **Note:** To format the style of the question table, click the **Format** button. See Chapter 7 for detailed information about formatting.

Side-by-Side Tables

Remark Web Survey provides the ability to place two or more tables of questions side-by-side. This feature is useful when you want to ask the same set of questions for two different purposes. For example, a respondent may answer the same set of questions for ranking areas of satisfaction and how important each area is to him or her. When adding multiple question sets using the Question Table Properties window, you may use two different types of answer formats. For example, you can use option buttons to rank satisfaction and then textboxes to allow the respondent to enter supporting comments.

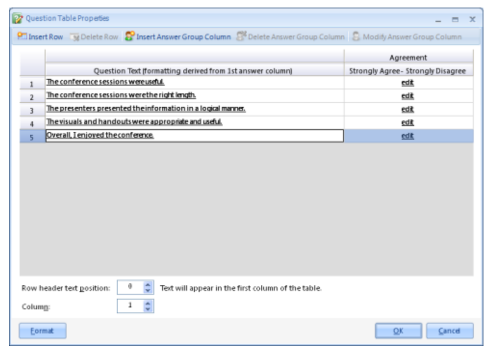
The following is an example of a side-by-side table with the question text in the middle.

Quality					Usefulness			
Very High	Somewhat High	Somewhat Low	Very Low		Very High	Somewhat High	Somewhat Low	Very Low
○	○	○	○	Program	○	○	○	○
○	○	○	○	Networking Opportunities	○	○	○	○
○	○	○	○	Pre-conference mailings	○	○	○	○
○	○	○	○	Pre-conference emails	○	○	○	○
○	○	○	○	Pre-conference web information	○	○	○	○
○	○	○	○	Conference as a whole	○	○	○	○

Side-by-Side table formatting is accomplished by using the same Question Table Properties window as described in the previous section. When pairing questions, you enter the question text once and then add as many answer columns as you wish. The individual answer columns can contain different styles of answers (e.g., checkboxes and option buttons).

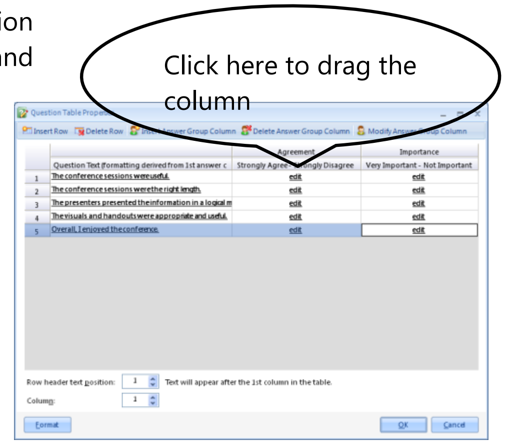
To format questions in side-by-side tables

1. From the **Insert** tab in the Ribbon, select the down arrow on the **Question** button and click **Question Table**. The **Question Table Properties** window opens.
2. Click the **Insert Row** button to insert a row that holds your question.
3. In the **Question Text Editor** window, type the question text for the question and format it as desired. Question text is limited to 10,000 characters.
4. Repeats steps 2 and 3 to insert more questions if desired.
5. Click the **Insert Answer Group Column** button. The answer columns represent the answer choices for each question. Insert multiple answer columns to create more question groupings. The answer column applies to all questions within the table (although you can remove answer items from individual questions).



6. In the **Question type** drop-down box choose the type of question you are inserting: Textbox/Text Area, Checkbox, Option Button, Drop-Down Box.
7. Choose the **Data type**: Textual or Numeric.
8. If desired, enter a **Table Header**. The table header is placed above the answer choice labels in the table and is optional. Table Headers are limited to 10,000 characters.
9. Click the **Answers** item on the left of the **Answer Group Properties** window.
10. If using a Checkbox, Option Button or Drop-Down Box question type, enter the **HTML Display**, **Labels** and **Values** (or select a pre-defined list).
11. If desired, utilize any of the other properties in the **Answer Group Properties** window.
12. Click the **OK** button to insert the answer group.
13. Repeat steps 5 – 12 to insert additional answer groups. Note that the same question text applies to all answer groups.

14. Once you have created all of the answer groups, to position them, click the header of the answer column in the grid and then use the mouse to drag and move the groups around. The order in which you see them in this window is the order in which they appear on-screen.
15. To position the question text, enter the column in which you want the question text in the **Question text position** box. If you have two answer columns and want the question text to appear in the middle of them, enter 1 in this box. (A position of 0 indicates the question text is all the way to the left.)
16. Click the **OK** button to insert the question table.



The questions are automatically placed into a table. You may edit the table by clicking the **Question Table** node in the tree view. The **Question Table Properties** window appears.

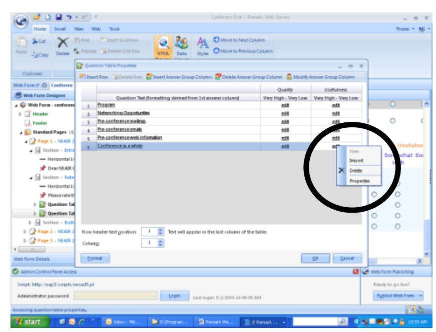
- **Note:** Each answer group does not have to have the same number of answer items. Also, each question does not have to correspond to every answer group. For example, if you have two answer groups set up, you could have a question (or questions) within the table pertain to only one of the answer groups by deleting it from the particular answer group.

Modifying Question Tables

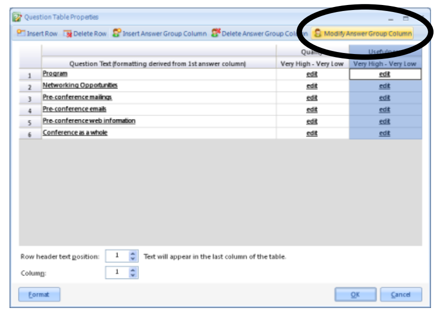
Once the table is set up, you cannot change certain features for individual questions, such as the actual answer choices (they must remain constant). However you can change properties such as formatting, whether a question is required, whether to grade or tabulate a question, etc.

To modify a question table

1. Double click the table node that you wish to modify in the tree view. Tables are represented by the syntax **Question Table (5)** in the tree view, where the number in parentheses is the number of questions in the table. Use the **Question Table Properties** window to make modifications.
   - To modify question text, click the question's link in the **Question Text** cells to display the **Question Text Editor** window. Question text is limited to 10,000 characters.



- To modify individual answer items, click the **Edit** link within the answer column. Choose **Delete** to remove the answer item. Choose **Import** to import an existing question from the web form into the answer column. Note that only questions that have the same format as the existing answer column are available for importing (see Chapter 6. for further details). Choose **Properties** to edit the answer item. When accessing properties, you are able to modify the properties on the **Attributes** and **Analysis** windows only.



- To modify an entire group of answer items, highlight the answer column and then click the **Modify Answer Group Column** button at the top of the window. The **Answer Group Properties** window appears, where you can change question types, modify answer choices, format text, etc. Changes made with this method affect the entire answer group.

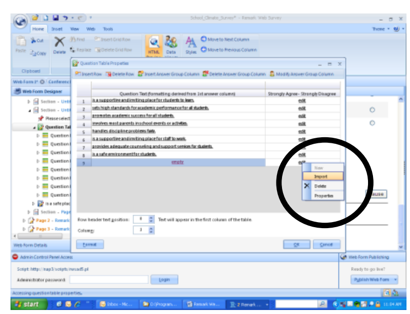
2. Click the **OK** button when you are finished modifying the question table.

Importing Questions into a Question Table

When clicking the Edit link within an answer item in a question table there is an option called Import. This option allows you to import a question from another area of the web form into the question table. You can import a copy of the question or move the question from its original position to the question table. You have the choice of overwriting an existing question in the table or importing the question as a new question in the table. You may only import questions that are not currently within a question table.

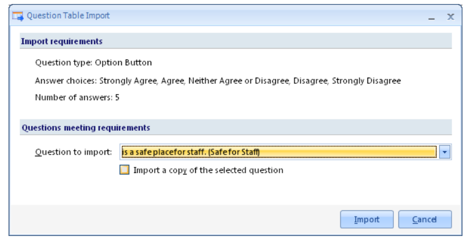
To import questions into a question table

1. Insert a question table or double click the table node that you wish to modify in the tree view. Tables are represented by the syntax **Question Table (5)** in the tree view, where the number in parentheses is the number of question rows in the table. Use the **Question Table Properties** window to make modifications.
2. Determine whether you want to overwrite an existing question or insert a question into the table as a new question. To modify an existing question, click the **Edit** link within the corresponding answer column. To add a question to the table, click **Insert Row** to insert a placeholder for the question you will import and then click the **Edit** link in the corresponding answer column. In either case, then choose **Import** from the **Edit** menu to import a question into the table.

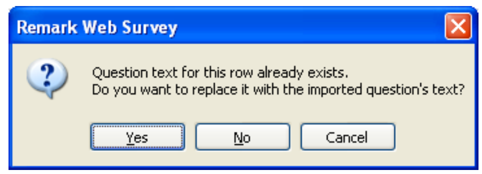


3. Select a question from the drop-down list titled **Question to import**. Note that only questions with the selected answer scale (listed in the **Import requirements** section of this window) are visible in the drop-down list.

4. If you would like to import a copy of the question and also leave the question in its original position, mark the checkbox for **Import a copy of the selected question**.



5. Click the **Import** button.
6. If you are not importing a copy of the question, a prompt appears confirming that you want to import the question and remove it from its original position. Click **Yes** to import the question or click **No** to return to the **Question Table Properties** window.
7. If you selected an existing question to overwrite with the imported question, when you click **Yes** in step 6 (or if you are importing a copy of the question), a prompt appears asking if you wish to overwrite the question text of the selected question. You have three options:
   - Click **Yes** to overwrite the existing question text in the table with that of the question you are importing.



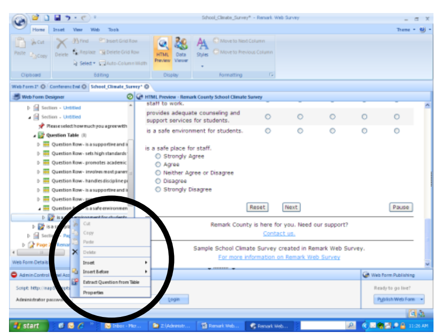
   - Click **No** to keep the question text that is already in the question table, but still import the question (even though your answer items are the same as the existing question, any other attributes are be imported).
   - Click **Cancel** to cancel the import and return to the **Question Table Properties** window.
8. Click the **OK** button to complete the import and close the **Question Table Properties** window.

Extracting questions from a question table

You may extract questions from a question table, in which case they are pulled out of the table and listed in the tree view beneath the table. When you extract questions from a table, the questions utilize the page style attributes defined in the Format Options window.

To extract a question from a question table

1. Expand the question table in the tree view until you can see the question text of the question(s) you wish to extract.
2. Select the question(s) you wish to extract.
3. Right click the mouse and then choose **Extract Question from Table** from the menu. The question(s) are removed from the table and added to the tree view after the question table.



Hiding questions in a Question Table

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 causes it to disappear altogether. If your table contains multiple answer columns and you only hide the question for one of those answer columns, the question still appears for the other answer columns. You can also hide all questions within a table to hide the table from view altogether.

To hide questions within a question table

1. There are two ways to access the hidden attribute for questions within a question table:
2. 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.
3. 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.
4. Click the **OK** button to return to the tree view.

The question is now hidden in the browser view.

Form Buttons

The various form pages can have a combination of buttons on them depending on the purpose for the page. By default, each page type has certain buttons added automatically. Buttons are added to their own Page Buttons section to help make positioning them easier. The button section has 10 columns by default so that you can move the buttons around to suit your needs. You can adjust the section settings as desired. The functionality of each button type is described below. Each button can be titled with any text that you like, but some of the common uses are below.

- **Submit/Next:** Submits all data on the current page. This button can be titled Submit, Next, Send Reminder (Session Pause pages), Login (Login pages), etc.
- **Reset:** Resets all data on the current page to its original state (blank).
- **Back:** Takes the respondent back to the previously loaded page. All data that was submitted from this page is displayed.

- **Session Pause:** Pauses the web form at the current submission point and allows the respondent to enter an email address to which a reminder is sent with a link back to the web form for completion. If using a Session Pause page, you need to place Session Pause buttons on at least one Standard page of your web form.

The following table summarizes the buttons that are available and automatically added for each page type:

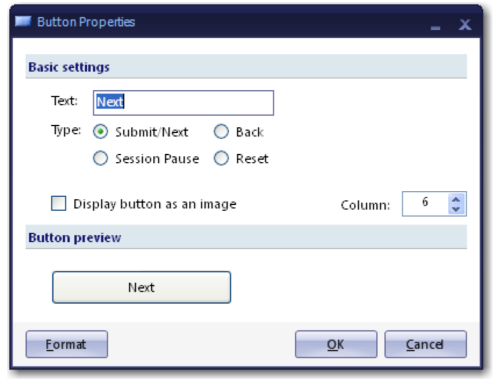
Page Type	Buttons Available	Buttons Added by Default
Standard Pages	Submit/Next, Reset, Session Pause, Back	Submit/Next, Reset
Login Pages	Login (Submit/Next), Reset	Login (Submit/Next), Reset
Web Form Complete Pages	None	None
Confirmation Pages	Submit/Next, Back	Submit/Next, Back
Session Pause Pages	Reset, Back, Send Reminder (Submit/Next)	Reset, Back, Send Reminder (Submit/Next)
Server Error Pages	Back	Back
Popup Info Pages	None	None

You may customize the look of any of the buttons placed on a form. You may use standard text buttons or import images of your own. If you import images, they must be in the GIF, JPG or PNG formats. These images are buttons that you have created on your own outside of the Remark Web Survey software.

- **Tip:** When creating multi-page web forms, we recommend that you put a back button on the pages. If the respondent attempts to use the web browser's back button a page sequence error occurs. You may wish to instruct respondents to only use the page's back and next buttons.

To select what type of button to use

1. Insert the desired page type.
2. Expand the **Section – Page Buttons** node in the tree view. The default buttons are listed.
3. Double click a button to modify it. Alternatively, right click a button and choose **Properties**, or select a button and choose **Properties** from the **View** tab on the Ribbon.



4. If using standard buttons, under **Basic settings**, select the type and accept or enter custom text for the button.
5. If using your own images, enter the button text first, and then mark the checkbox for **Display button as image**. Note: the text entered for button images appears when the respondent hovers the mouse over the button (also called Alternate text). This text is useful for creating Section 508 compliant forms so that screen readers can pick up the text for each button.
6. Under **Button preview**, click the link for **Select image**.
7. Locate the desired button image and then click the **Open** button.
8. If desired, use the **Column** setting to modify the position of the button. The number of columns listed here is dependent upon the number of columns in the section. The lowest column number places the button to the left of the screen, while the highest column number places the button to the right of the screen.

To insert a button

1. Select a section in which to insert the button.
2. From the Ribbon, select the **Insert** tab and then click **Button**. The **Button Properties** window appears.
3. Choose the type of button and format it as desired, as outlined in the previous steps.
4. Click the **OK** button to save the button.

The button is added to the tree view and is visible in the HTML Display. Buttons have their own set of format options in order to adjust the style. See Chapter 7 for detailed information about how to format buttons.

- **Tip:** If you want to view properties for all button types at once, from the Ribbon, go to **Home**, click **Select** and then click **Buttons**. From here, you can choose all buttons or specific button types and then choose an action (such as right clicking and choosing Properties).

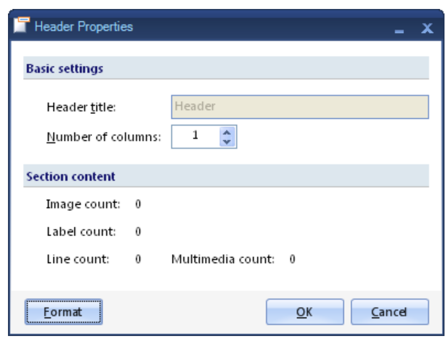
Headers and Footers

You may add headers and footers to your web form that can include images, text labels, lines and multimedia. Headers and footers are useful for static information you want to display either at the top (header) or bottom (footer) of a web form. Once a header or footer is created, you can choose which pages you want the header and/or footer to appear on within a web form. By default, headers and footers are turned on for all standard pages. Therefore, if you define a header and footer, they automatically appear on each web form page. You can turn off the header and footer for any individual page by going into the page's properties. The header and footer nodes are added to the tree view every time you create a new web form. To use them, add elements to the header and/or footer and then determine which pages include the header and footer.

- **Note:** If adding multimedia files to the header or footer, the video or audio clip restarts every time a new web page within the web form loads.

To format the header or footer

The only item you can format on a header or footer is the number of columns. By default, they have one column. If you would like to adjust this setting so that you can place elements in the header or footer going across the page (in columns), you can access the header or footer's properties and then change the column setting.



1. Access the header or footer properties by either double clicking the header or footer node in the tree view, right clicking the header or footer node in the tree view and then selecting **Properties** or selecting the header or footer node in the tree view and the selecting **Properties** from the **View** tab in the Ribbon.
2. Change the **Columns** setting to the desired number of columns (if you want more than one column).
3. Click the **OK** button to save the changes. You may now start adding elements to the header or footer.

To add elements to the header or footer

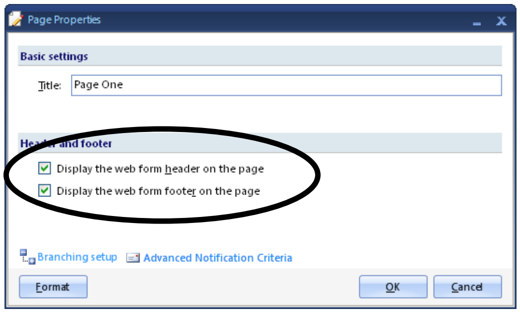
1. Click the header or footer in the tree view to select it.
2. From the Ribbon, select the **Insert** tab and then choose the element you wish to insert: **Label**, **Image**, **Line** or **Multimedia**.
3. Enter or adjust the properties of the element, as described in the previous sections of this chapter. If desired, click the **Format** button to further format the element (e.g., color, positioning, etc.). Detailed information on Style Properties is found in Chapter 7.
4. Click the **OK** button to save your changes.

The added element is added to the header or footer section of the tree view and is visible in the HTML Preview.

To display headers and footers on web form pages

Once you have set up a header or footer, you may choose the pages on which to display the header or footer. By default, headers and footers are turned on for all standard web form pages.

1. Access a page's properties by either double clicking the page node, right clicking the page node and selecting **Properties** or clicking the page node and then selecting **Properties** from the **View** tab in the Ribbon.
    - **Note:** You may place headers and footers on multiple web form pages at one time by either: 1) clicking each page node in the tree view while holding down the **Ctrl** key on the keyboard to select multiple pages, or 2) if you wish to select all pages of a certain type, click the container node in the tree. For example, if you want to turn on headers/footers for all standard pages, double click the **Standard Pages** node in the tree view.



2. Mark the checkbox for **Display the web form header on the page** to turn on page headers. Mark the checkbox for **Display the web form footer on the page** to turn on page footers.
3. Click the **OK** button to save your changes.

The selected pages have headers and/or footers displayed on them in the HTML Preview.

Editing Existing Elements

There may be times when you need to modify an element that you have added to the web form. All elements can easily be modified.

To edit an element

1. Double click the element you wish to modify in the tree view. Alternatively right click the element(s) you wish to modify and then select **Properties**, or select **Properties** from the **View** tab in the Ribbon to view the element's properties window.
2. Make the desired changes.
3. Click the **OK** button to save the changes.
    - **Note:** You may select multiple elements by holding down the **Ctrl** key as you click the elements in the tree view. When selecting more than one element, the Properties option is only enabled if you are selecting two elements of the same type (e.g., two buttons or two questions). When viewing the properties, items in red have dissimilar information. For example, if you select a checkbox style question and an option button style question, the Question type property is listed in red. You may still adjust these disparate properties, but keep in mind that all selected elements are reset to the newly entered property information. The property for the item that was selected last is visible in the properties window.

- **Tip:** You can select all items of the same type by going to the **Home** tab on the Ribbon, clicking **Select** and then choosing the type of element you wish to select from the list. For example, suppose you want to add a border to all buttons on the web form. Click **Select** and then choose **Buttons** from the list. All buttons are be highlighted. You can then go to the **View** tab on the Ribbon and select **Properties** to adjust the buttons' properties.

Chapter 6: Opening, Saving and Modifying Web Forms

Overview

The previous chapters described the various parts that make up a web form and how to insert and modify elements on a web form. When using the software, there are other tools that you may find useful as you design web forms. The topics that are covered in this chapter include:

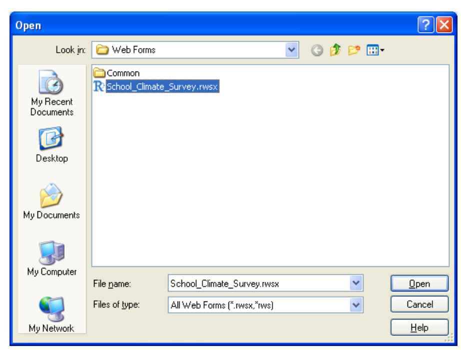
- Opening web forms
- Saving web forms
- Manipulating existing web forms
- Spell checker
- Converting old web forms

Opening a Web Form

You can open a previously created web form to make modifications or publish it to your web server, download data or run analysis. Only web forms saved in the Remark Web Survey format (.rwsx or .rws) can be opened from within Remark Web Survey.

To open a web form

1. From the Design window, select the **Application Button**  and then click **Open**, or click , to display the **Open** window. Notice that when you click the Application Button, a recently used file list appears automatically (this list stores up to 10 recently accessed files). You may also select a web form from this list.
   - **Note:** The **Open** button is also available from the **Quick Access Toolbar**.



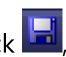
2. Select the desired web form by clicking its name.
3. Click the **Open** button to open and display the form.
   - **Warning:** You are only able to open web forms that are created in Remark Web Survey and therefore have a .rwsx extension. These files are only meant for use within Remark Web Survey. Though we do not recommend or support it, once a form has been created and published, you are able to make changes to the resulting HTML files outside of Remark Web Survey. For example, you may format the HTML files in an HTML editor. However, if you modify a form outside of Remark Web Survey, you cannot reopen the .rwsx file in Remark Web Survey without losing those changes. The .rwsx file is the original file you created without any of the changes made to the HTML files. You may not change the name of the HTML files

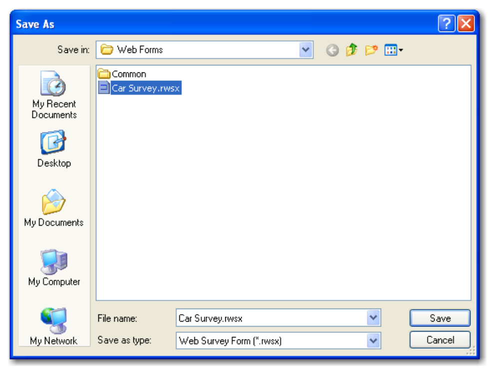
while editing it (e.g., do not change the name page_1.html to mysurvey.html). Changing the name causes Remark Web Survey to be unable to administer the form properly. Certain changes to elements on the web form can also break the web form's functionality. **Gravic cannot support files that have been altered outside of Remark Web Survey.**

Saving a Web Form

You can save a web form as a Remark Web Survey document. Forms are saved in the .rwsx format, which is proprietary to the Remark Web Survey software.

To save a web form

1. Select the **Application Button**  and then click **Save**, or click , to display the **Save As** window. You may also select **Save As** to save an existing form with a new name or to a new location.
    - **Note:** The **Save** button is also available from the **Quick Access Toolbar**.



The Save As window allows you to select a form name and a directory to which to save the form.

2. Place the cursor in the **File name** box and type a name for the form.
3. Click the **Save** button to save the form.
    - **Note:** If you have already saved the web form, clicking **Save** automatically overwrites the file without prompting you.

Once the web form is complete, you are ready to publish the web form to your web server. See Chapter 9 for further details.

Moving and Rearranging Elements

While Chapter 5 covered inserting elements into a web form, the tree view can be used to delete, copy and move elements.

To delete an element

1. Select the node(s) representing the element(s) you wish to delete.
2. Select the **Home** tab in the Ribbon and then click **Delete** 

, right click the element and then select **Delete**, or press the **Delete** key on your keyboard.

To move an element using cut and paste

You can move an element to another position on the web form in one of two ways. The first method is to use the **Home** tab in the Ribbon to cut and paste the object in a new position.

1. Select the element you would like to move.
2. Select the **Home** tab in the Ribbon and then click **Cut** (Ctrl + X), or click 

.
3. Select an insertion point in the tree view.
4. Select the **Home** tab in the Ribbon and then click **Paste** (Ctrl + V), or click 

, to paste the element after the currently selected element.

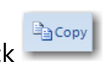
To move an element using drag and drop

You may use drag and drop to move an element to a new position.

1. Select the element you would like to move.
2. While holding down the left mouse button, drag the item to its new desired location.
3. When you have reached the new location, release the mouse button. The element is dropped after the selected element.
    - **Note:** You may press the **Shift** key while dragging the element to insert it *before* the last selected element. An arrow shows you that you are moving before the selected element.

To copy an element using copy and paste

You can copy one element to another location in one of two ways. The first method is to use the **Home** tab in the Ribbon to copy and paste the object in a new location.

1. Select the element you would like to copy.
2. Select the **Home** tab in the Ribbon and then click **Copy** (Ctrl + C), or click 

.
3. Select an insertion point in the tree view.
4. Select the **Home** tab in the Ribbon and then click **Paste** (Ctrl + V), or click 

to paste the element after the currently selected element.

To copy an element using drag and drop

The second method of copying elements is to use drag and drop to copy the element to a new location.

1. Select the item you would like to copy.
2. Drag the item to its new desired location.
3. Press the **Ctrl** key when you have reached the new location (before releasing the mouse button).
4. Release the mouse button. The element is copied to the new location.

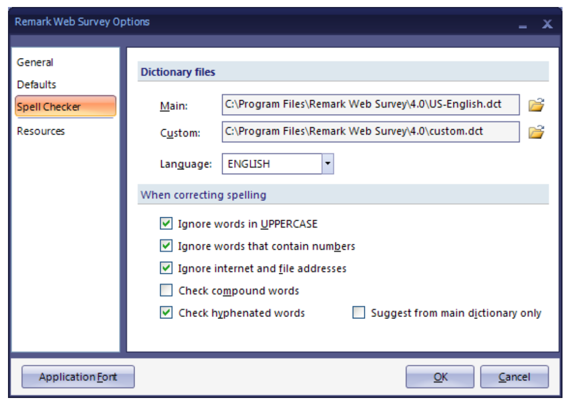
- **Note:** You may press the **Shift** key while dragging the element to copy it before the last selected element. An arrow shows you that you are copying before the selected element.

Spell Checker

Remark Web Survey includes a spell checker feature that includes customized dictionaries in multiple languages. The spell check searches labels, question text, answer text and table headers for misspellings.

To set up the spell checker

1. Select the Application Button,  then click Web Survey Options and then click Spell Checker.
2. Under **Dictionary Files**, select the location where your dictionaries are found. (Note that the default dictionary is typically fine unless you have a specific dictionary you would like to use.) There is a **Main** dictionary and a **Custom** dictionary. Remark Web Survey first uses the main dictionary and then as you add custom spellings it creates the custom dictionary. When performing spell check functions, the software uses both dictionaries unless you mark the checkbox titled **Suggest from main dictionary only**.



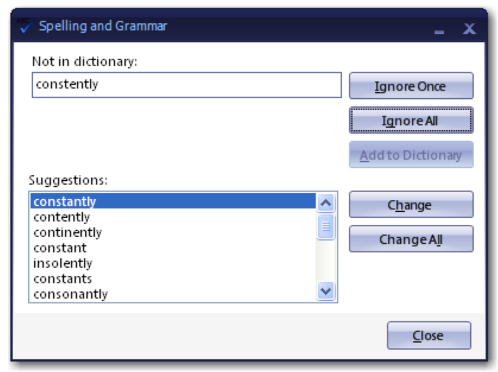
3. In the **Language** box, select the language for your spell check dictionary files.
4. Under When correcting spelling, select the options you wish the spell checker to use: Ignore words in UPPERCASE, Ignore words that contain numbers, Ignore internet and file addresses, Check compound words, Check hyphenated words, Suggest from main dictionary only. These options can help you customize how the spell checker reviews your web forms.

To use the spell checker

1. With a form open, select the **Tools** tab from the Ribbon and then click **Spelling**, or click . The spell checker window displays if an exception is found.

2. When an exception is encountered, select an option for the problem. The following options are available:

Option	Description
Ignore Once	Ignore the exception this time only.
Ignore All	Ignore all occurrences of the exception.
Add to Dictionary	Add the exception to your custom dictionary.
Change	Select a word from the Suggestions list and then click Change to change the exception.
Change All	Select a word from the Suggestions list and then click Change All to change all occurrences of the exception.
Close	Cancel the spell checker.



3. Make a selection from the above list. Note that you may type directly into the **Not in Dictionary** box and then choose an option.
4. Continue making selections until you receive a message that the spell checker is complete.

Converting Remark Web Survey 4 Forms

Remark Web Survey 5 converts .rwsx files that were created in Remark Web Survey 4 automatically.

- **Important Note:** If you are using Remark Web Survey 1.x or 2.x web forms, these files do not convert automatically. They need to be converted to the Remark Web Survey 3 or 4 format first, and then they can be opened in Remark Web Survey 5. If you do not have Remark Web Survey 3/4, please email your web form files (.rws files) to Gravic's support team and we will convert them for you (contact information is on the back of this book or our website).

When a Remark Web Survey 4 file is converted to the new version, the conversion takes place when the file is saved. You should make a copy of the file before converting it to the new version. Once the version 4 .rwsx file is converted, you may not use it again in version 4 of the software. When you set up Remark Web Survey 5, you may decide to use a different Default forms directory for the storage of web forms on your website. Therefore, your converted web form and all of its files may be in a different folder. We recommend that you download any data that currently exists for Remark Web Survey 4 forms before the conversion. You can always combine this data with any new data files that are created.

- **Tip:** If at all possible, you may wish to close out any web forms you are currently running under Remark Web Survey 4 before bringing them into Remark Web Survey 5. We realize that this may not be possible for ongoing web forms. In this case, use the instructions that follow to make the migration as smooth as possible.

To convert an old file to the new version

1. Select the **Application Button** and then click **Open**, or click from the Quick Access Toolbar.
2. Locate the .rwsx or .rws file you wish to open. Keep in mind that you may only convert version 3.x and 4.x files in this version.
3. Click the **Open** button to open the file.
4. Save the file in Remark Web Survey 5 by selecting the **Application Button** and then clicking **Save**, or click from the Quick Access Toolbar. Provide a **File name** and select a location in which to save the file. Do not overwrite the original file or you are not able to use it in the older version.
5. Click the **OK** button. The new file has a .rwsx extension and can only be opened in Remark Web Survey 5. The old file remains intact and can still be used in the previous Remark Web Survey version if needed.

You may now modify the web form as desired. If you plan to combine data for the same form that was collected in Remark Web Survey 4 and Remark Web Survey 5, do not make any structural changes to the web form (e.g., add questions, delete questions, rearrange questions, etc.). When completed, publish the form to your website as you would any other web form (see Chapter 9).

If the form still has data that you collected with Remark Web Survey 4, you have two options for combining the data (in both cases you should start a new data file once the file is converted to version 5):

- RECOMMENDED: Download the data into Remark Web Survey 4, save it as a Remark (RMK) data file and then open that data file in Remark Web Survey 5.
- Download the old data from your website using the Remark Web Survey 4 administration script (rwsad4.pl). This provides you with a .rwd file that can be opened in Remark Web Survey 5.
- **Note:** Remark Web Survey 5 is an upgrade to Remark Web Survey 4. While the two products can physically reside on the same system, Remark Web Survey 5 should replace Remark Web Survey 4 (e.g., it does not grant you an additional license to Remark Web Survey). We understand that you may need to migrate web forms from one version to the other over a period of time. Once all of your web forms are migrated to the new version, please uninstall Remark Web Survey 4 and only use version 5 (always back up your files before uninstalling any program).

Chapter 7: Formatting and Style Sheets

Overview

Each web form that you create has its own format, also known as style; that is, its own character in terms of colors, fonts and other formatting attributes. Remark Web Survey allows you to customize the format of the elements on the web forms that you create. In addition, you can save formatting options as style sheets so that they can be reused. Styles allow you to customize fonts, colors, line breaks, image attributes and other properties throughout the web form.

Formatting Options

The application of styles is handled through the **Style Properties** window. You use this window to set formatting options and then apply them to the various parts of the web form. Every property listed in the Style Properties window has descriptive text at the bottom of the window. Click a style property to view its descriptive text.

The following table shows all of the possible formatting options in the Style Properties window (listed in alphabetical order for each element):

Element Category: Answers

Style Property	Description
Alignment	The **Alignment** style property sets whether to place the answer element in the left, center or right area of the section. Click in the right portion of the cell to access a drop-down list of choices. The Alignment property can only be accessed when you click Format from the Question Properties window (not from the Answer Properties window). Alignment applies to all answers within a question and cannot be applied to individual answers within the same question.
Answer Box Height	When inserting a Textbox question, you can increase its height by adding rows, which turns it into a Text Area. A Text Area style question has multiple rows and columns to accommodate more text than a one-line textbox. Note that this style is also available in the Attributes section of the Question Properties window.

Style Property	Description
Answer Box Width	When inserting a Textbox question, you can increase its width by adding columns. Note that the width of a textbox is the same number of characters respondents are able to type (e.g., a textbox with a width of 10 allows 10 characters). If using a Text Area (multiple lines), the **Answer Box Width** setting does not limit the number of characters that can be typed. However, if they exceed the limit you set in the question's properties, respondents receive an appropriate message when they submit the page. Note that this style is also available in the Attributes section of the Question Properties window.
Background Color	The **Background Color** style property sets the background color for the element. Click in the right portion of the cell to access a drop-down list of colors. The font remains unchanged, but the background of the text changes in color.
Font	The **Font** style property sets the font name for the element. Click in the right portion of the cell to access a drop-down list of fonts. Alternatively, type a list of fonts separated by commas. **Note:** It may be the case that the font you select here is not available on the respondent's computer. Using the Remark Web Survey program options, you can select more than one font for your respondents. If the main font is not available on the respondent's system, the backup fonts are used. Select the Application Button  and then choose Web Survey Options to choose backup fonts that display when the selected font is unavailable.
Font Bold	The **Font Bold** style property sets whether the font used for the answer element is in bold format. Use True to set it to bold format and False to remove bold formatting.
Font Color	The **Font Color** style property sets the color for the font used for the answer element. Click in the right portion of the cell to access a drop-down list of font colors.
Font Italic	The **Font Italic** style property sets whether the font used for the answer element is in italic format. Use True to set it to italic format and False to remove italic formatting.
Font Size	The **Font Size** style property sets the size of the font used for the answer element. Enter a numeric value. 10 is a typical number used for web forms; use a higher number for larger text and a lower number for smaller text.

Style Property	Description
Font Underline	The **Font Underline** style property sets whether the font used for the answer element is underlined. Use True to underline the answer element and False to remove underline formatting.
Horizontal Alignment	The **Horizontal Alignment** style property sets the horizontal alignment for checkbox and option button style answer elements (left, center, right). Tip: Use this property in table formatting when you want checkboxes and option buttons to be centered below the answer text. This property is also useful in conjunction with Image Position when using images as answer choices.
Image Position	The **Image Position** style property sets whether images used as answer choices should be left, right, top or bottom aligned in comparison to the HTML Display text.
Indent Levels	The **Indent Levels** style property sets the number of levels to indent the element. One indent level equals one HTML space. As you increase the indent levels, the answer element moves toward the right of the web form page.
Line Breaks After	The **Line Breaks After** style property sets the number of line breaks after the element. Enter a numeric value to add line breaks after the element. Adding line breaks creates vertical space after the last answer element for the question.
Line Breaks Before Appended Textbox	The **Line Breaks Before Appended Textbox** style property sets the number of line breaks between an element and an appended textbox (e.g., an "other" textbox). Enter a numeric value to add line breaks before the appended textbox. Adding line breaks creates vertical space before the appended textbox. Use a value of 0 to place the appended textbox on the same line as the answer element.
Vertical Alignment	The **Vertical Alignment** style property sets the answer's alignment to Top, Middle or Bottom. This aligns everything within the answer element (e.g., HTML Display, images and the element itself, such as a checkbox or option button).

Element Category: Buttons

Style Property	Description
Alignment	The **Alignment** style property sets whether to place the button element in the left, center or right area of the section. Click in the right portion of the cell to access a drop-down list of choices.
Border Color	The **Border Color** style property allows you to choose a color for the border around the button (if one is used). Click the arrow in the right portion of the window to drop down a list of available colors.
Border Style	The **Border Style** style property allows you to create either a 3D border or a flat border around the button. A 3D border looks similar to a raised border if the border width is great enough. Please note that color can affect the 3D look of a border (e.g., black cannot look three-dimensional).
Border Width	The **Border Width** style property places a border around the button and sets the thickness. Enter a numeric value; the higher the number, the thicker the border. Use 0 if you do not want a border. The default value is -1, which uses the web browser's default setting for buttons (Windows XP style).
Font	The **Font** style property sets the font name for the text in the button element. Click in the right portion of the cell to access a drop-down list of fonts. Alternatively, type a list of fonts separated by commas. **Note:** It may be the case that the font you select here is not available on the respondent's computer. Using the Remark Web Survey program options, you can select more than one font for your respondents. If the main font is not available on the respondent's system, the backup fonts are used. Select the Application Button  and then choose Web Survey Options to choose backup fonts that display when the selected font is unavailable.
Font Bold	The **Font Bold** style property sets whether the font used for the text in the button element is in bold format. Use True to set it to bold format and False to remove bold formatting.
Font Color	The **Font Color** style property sets the color for the font used for the text in the button element. Click in the right portion of the cell to access a drop-down list of font colors.
Font Italic	The **Font Italic** style property sets whether the font used for the text in the button element is in italic format. Use True to set it to italic format and False to remove italic formatting.

Style Property	Description
Font Size	The **Font Size** style property sets the size of the font used for the text in the button element. Enter a numeric value. Use a higher number for larger text and a lower number for smaller text.
Font Underline	The **Font Underline** style property sets whether the font used for the text in the button element is underlined. Use True to underline the answer element and False to remove underline formatting.
Height	The **Height** style property allows you to increase or decrease the height of the button, creating a larger or smaller button.
Line Breaks After	The **Line Breaks After** property sets the number of line breaks after the button element. Enter a numeric value to add line breaks after the element. Adding line breaks creates vertical space after the button. By adding line breaks between buttons, you can force buttons to be on separate lines (e.g., place one button on the form, put a line break after it, then add another button; that button is on the next line). Please note that buttons have one line break after automatically (the setting reads 0 because the line break is built-in to the element).
Width	The **Width** style property allows you to increase or decrease the width (length) of the button, creating a larger or smaller button.

Element Category: Images

Style Property	Description
Alignment	The **Image Horizontal Alignment** style property sets whether to align the image left, center or right relative to the section in which it resides.
Border Color	The **Border Color** style property allows you to choose a color for the border around the image (if one is used). Click the arrow in the right portion of the window to drop down a list of available colors.
Border Style	The **Border Style** style property allows you to create either a 3D border or a flat border around the image. A 3D border looks similar to a raised border if the border width is great enough. Please note that color can affect the 3D look of a border (e.g., black cannot look three dimensional).
Border Width	The **Border Width** style property places a border around the image and sets the thickness in pixels. Enter a numeric value; the higher the number, the thicker the border. Use 0 if you do not want a border. The default value is -1, which uses the web browser's default setting for buttons (Windows XP style).

Style Property	Description
Height	The **Height** style property sets the height of the image in pixels. Note that you can also adjust image height in the Image Properties window.
Line Breaks After	The **Line Breaks After** style property sets the number of line breaks after the image element. Enter a numeric value to add line breaks after the element. Adding line breaks creates vertical space after the image. Please note that Images have one line break after automatically (the setting reads 0 because the line break is built-in to the element).
Width	The **Width** style property sets the width of the image in pixels. Note that you can also adjust the image width in the Image Properties window.

Element Category: Labels

Style Property	Description
Alignment	The **Alignment** style property sets whether to place the label element in the left, center or right area of the section. Click in the right portion of the cell to access a drop-down list of choices.
Background Color	The **Background Color** style property sets the background color for the label element. Click in the right portion of the cell to access a drop-down list of colors. The text font remains unchanged, but the background of the label changes in color.
Font	The **Font** style property sets the font name for the label element. Click in the right portion of the cell to access a drop-down list of fonts. Alternatively, type a list of fonts separated by commas. **Note:** It may be the case that the font you select here is not available on the respondent's computer. Using the Remark Web Survey program options, you can select more than one font for your respondents. If the main font is not available on the respondent's system, the backup fonts are used. Select the Application Button  and then choose Web Survey Options to choose backup fonts that display when the selected font is unavailable.
Font Bold	The **Font Bold** style property sets whether the font used for the label element is in bold format. Use True to set it to bold format and False to remove bold formatting.
Font Color	The **Font Color** style property sets the color for the font used for the label element. Click in the right portion of the cell to access a drop-down list of font colors.

Style Property	Description
Font Italic	The **Font Italic** style property sets whether the font used for the label element is in italic format. Use True to set it to italic format and False to remove italic formatting.
Font Size	The **Font Size** style property sets the size of the font used for the label element. Enter a numeric value. 10 is a typical number used for web forms; use a higher number for larger text and a lower number for smaller text.
Font Underline	The **Font Underline** style property sets whether the font used for the text in the label element is underlined. Use True to underline the answer element and False to remove underline formatting.
Indent Levels	The **Indent Levels** style property sets the number of levels to indent the element. One indent level equals one HTML space. As you increase the indent levels, the label element moves toward the right of the web form page.
Line Breaks After	The **Line Breaks After** style property sets the number of line breaks after the label element. Enter a numeric value to add line breaks after the element. Adding line breaks creates vertical space after the label. Please note that labels have one line break after automatically (the setting reads 0 because the line break is built-in to the element).

Element Category: Lines

Style Property	Description
Alignment	The **Alignment** style property sets whether to place the line element in the left, center or right area of the section. Click in the right portion of the cell to access a drop-down list of choices.
Color	The **Color** style property sets the color for the line element. Click in the right portion of the cell to access a drop-down list of font colors.
Height	The **Height** style property sets the height/thickness of the line in pixels.
Line Breaks After	The **Line Breaks After** style property sets the number of line breaks after the line element. Enter a numeric value to add line breaks after the element. Adding line breaks creates vertical space after the line. Please note that lines have one line break after automatically (the setting reads 0 because the line break is built-in to the element).

Style Property	Description
Width	The **Width** style property sets the width of the line in percentages. 100% extends the line across the entire width of the page. You may also enter a width in pixels (do not use the percent sign in this case).

Element Category: Multimedia

Style Property	Description
Alignment	The **Horizontal Alignment** style property sets whether to align the multimedia element left, center or right relative to the section in which it resides.
Border Color	The **Border Color** style property allows you to choose a color for the border around the multimedia element (if one is used). Click the arrow in the right portion of the window to drop down a list of available colors.
Border Width	The **Border Width** style property places a border around the multimedia element and sets the thickness in pixels. Enter a numeric value; the higher the number, the thicker the border. Use 0 if you do not want a border. The default value is -1, which uses the web browser's default setting for buttons (Windows XP style).
Line Breaks After	The **Line Breaks After** style property sets the number of line breaks after the multimedia element. Enter a numeric value to add line breaks after the element. Adding line breaks creates vertical space after the image. Please note that multimedia files have one line break after automatically (the setting reads 0 because the line break is built-in to the element).
Media Player Height	The **Media Player Height** style property sets the height of the media player in pixels.
Media Player Width	The **Media Player Width** style property sets the width of the media player in pixels.
Show Player Controls	The **Show Player Controls** style property lets you control whether to display the audio/video player's controls, such as start, stop, rewind, fast forward and pause. The controls may vary based on the audio/video player being used. If you show the controls, respondents can utilize them when the audio/video file loads. If you do not show the controls, respondents do not have the ability to manipulate the player (e.g., restart the audio/video clip, rewind and re-listen, etc.).

Style Property	Description
Show Player Status	The **Show Player Status** style property lets you control whether to display the player's status. Status messages include things such as "buffering media", "loading media file" and so forth. These messages give an indication to the respondent as to what is happening with the multimedia file.

Element Category: Pages

Style Name	Description
Alignment	The **Alignment** style property sets whether the page is left, center or right aligned. Click in the right portion of the cell to access a drop-down list of choices. Alignment is affected by the Width setting. When using 100% width, it is harder to see a difference in alignment. However, as you shrink the width, the margins get wider and the alignment of the elements on the page becomes more evident.
Background Color	The **Background Color** style property sets the background color for the page. Click in the right portion of the cell to access a drop-down list of colors. The entire background of the web form page changes in color.
Background Image	The **Background Image** style property puts an image in the background of the page. Click the ellipse (…) to select an image to use as the background for the entire page.
Background Image Display	The **Background Image Display** style property sets the position of the background page image: Left, Center, Right or Tile.
Enable Background Image	The **Enable Background Image** style property displays the background image for the page. After selecting a background image in Background Image Display, set this property to True to display the image. You can set this property to False for specific pages without having to remove the image selected for Background Image Display.
Width	The **Width** style property sets the width of the page in percentages. When using 100% the elements placed on the page extend the width of the entire page.

Element Category: Question Tables

Style Name	Description
Alignment	The **Horizontal Alignment** style property sets the alignment of the table relative to the section: Left, Center or Right.
Background Color	The **Background Color** style property sets the background color for the question table. Click in the right portion of the cell to access a drop-down list of colors.
Background Color Enabled	The **Background Color Enabled** style property sets whether to display a background color. The color is chosen either in the Background Color for Alternate Rows or Background Color properties.
Background Color for Alternate Columns	The **Background Color for Alternate Columns** property style sets the background color for alternating columns within the question table. Use the **Background Column Color Display** style property (see next page) to determine whether alternating columns or answer groups utilize the background color. Click in the right portion of the cell to access a drop-down list of colors.
Background Color for Alternate Columns Style	The **Background Color for Alternate Columns Style** property style sets whether to apply the background color you selected for alternate columns to all columns in the table or only the first column in the table.
Background Color for Alternate Rows	The **Background Color for Alternate Rows** style property sets the background color for alternating rows within the question table. Click in the right portion of the cell to access a drop-down list of colors.
Background Color for Alternate Rows Style	The **Background Color for Alternate Rows Style** property style sets whether to apply the background color you selected for alternate rows to all the rows in the table table or only the first row in the table.
Background Color for Question Text Cells	The **Background Color for Question Text Cells** style property sets the background color for the column or row that contains the question text. Click in the right portion of the cell to access a drop-down list of colors.
Background Color Solid	The **Background Color is Solid** style property controls whether to use a solid background for the entire question table. When enabled, solid background color is used and alternate row background color is not used.

Style Name	Description
Background Column Color Display	The **Background Column Color Display** style property allows you to format the columns by Column or Answer Group. When formatted by Column, alternating columns have the background color applied, regardless of the answer group to which the question applies. When formatted by Answer Group, the entire group of answers has the background color applied. The latter feature is useful for side-by-side tables where more than one answer group is used with the same set of questions.
Column Header Text Alignment	The **Column Header Text Alignment** style property allows you to format all of the column header text in the left, center or right of the column. This feature is useful if you want all of the answer text, for example, to be centered over the columns. Once this property is set, you may still go into individual answer items and adjust their alignment.
Display Answer Group Header	The **Display Answer Group Header** style property controls whether the header entered into the answer group section of question table is displayed. This property is on by default.
Display Answer Scale Header	The **Display Answer Scale Header** style property controls whether the scale (e.g., Excellent to Poor ratings for option button questions) entered into the answer group section of question table is displayed. This property is on by default.
Font	The **Font** style property sets the font name for the question table element. Click in the right portion of the cell to access a drop-down list of fonts. Alternatively, type a list of fonts separated by commas. **Note:** It may be the case that the font you select here is not available on the respondent's computer. Using the Remark Web Survey program options, you can select more than one font for your respondents. If the main font is not available on the respondent's system, the backup fonts are used. Select the Application Button  and then choose Web Survey Options to choose backup fonts that display when the selected font is unavailable.
Font Bold	The **Font Bold** style property sets whether the font used for the question table is in bold format. Use True to set it to bold format and False to remove bold formatting.
Font Color	The **Font Color** style property sets the color for the font used for the question table. Click in the right portion of the cell to access a drop-down list of font colors.

Style Name	Description
Font Italic	The **Font Italic** style property sets whether the font used for the question table is in italic format. Use True to set it to italic format and False to remove italic formatting.
Font Size	The **Font Size** style property sets the size of the font used for the question table. Enter a numeric value. 10 is a typical number used for web forms; use a higher number for larger text and a lower number for smaller text.
Font Underline	The **Font Underline** style property sets whether the font used for the text in the question table is underlined. Use True to underline the answer element and False to remove underline formatting.
Indent Levels	The **Indent Levels** style property sets the number of levels to indent the question table. One indent level equals one HTML space. As you increase the indent levels, the question table moves toward the right of the web form page.
Line Breaks After Question Table	The **Line Breaks After Question Table** style property sets how many line breaks to put after the entire question table.
Question Column Width	The **Question Column Width** style property sets the width of the question column within the table in terms of percentages. The question column utilizes the specified width, and the answer items evenly fill the remaining portion of the table. This feature allows your answer items to be evenly spaced on the page.
Question Column Widths Enabled	The **Question Column Widths Enabled** style property enables the use of custom question columns widths. Use this property in conjunction with Question Column Width.
Row Header Text Alignment	The **Row Header Text Alignment** style property sets whether to place the row header text in the left, center or right portion of the table column. Row header text is question text when a table is laid out “question by answer”. Row header text is answer text when a table is laid out “answer by question.”
Table Borders -Color (External)	The **Table Borders - Color External** style property allows you to choose a color for the external border around the table (if one is used). Click the arrow in the right portion of the window to drop down a list of available colors.
Table Borders -Color (Internal)	The **Table Borders - Color Internal** style property allows you to choose a color for the internal borders within the table (if they are used). Click the arrow in the right portion of the window to drop down a list of available colors.

Style Name	Description
Table Borders -External	The **Table Borders - External** style property sets whether to use an outside border around the entire table of questions. The Background Color for Alternate Rows property controls the border color.
Table Borders - Internal	The **Table Borders - Internal** style property sets whether to use borders around each individual question within the question table. By using this feature, the table borders are visible. The Background Color for Alternate Rows property controls the border color.
Table Borders – Width (External)	The **Table Borders – Width (External)** style property controls the size of the border around the table by setting its thickness in pixels. Enter a numeric value; the higher the number, the thicker the border.
Table Borders -Width (Internal)	The **Table Borders – Width (Internal)** style property controls the size of the internal border used in the table by setting its thickness in pixels. Enter a numeric value; the higher the number, the thicker the border.
Table Layout	The **Table Layout** style property allows you to lay out the table using Question by answer or Answer by Question. Question by Answer puts the question text down the left side of the table and the answer text across the top. Answer by Question puts the answer text down the left side of the table and the question text across the top.
Table Width	The **Table Width** style property specifies the width of the table across the web form page. The default value is Auto meaning it spans the page. You can type a width percentage in the box or choose one from the drop-down list.
Vertical Alignment	The **Vertical Alignment** style property sets the question table row alignment to the top, middle or bottom of the row. Click in the right portion of the cell to access a drop-down list of choices.

Element Category: Questions

Style Name	Description
Alignment	The **Alignment** style property sets whether to place the question element in the left, center or right area of the section. Click in the right portion of the cell to access a drop-down list of choices.
Background Color	The **Background Color** style property sets the background color for the question element. Click in the right portion of the cell to access a drop-down list of colors.

Style Name	Description
Font	The **Font** style property sets the font name for the question element. Click in the right portion of the cell to access a drop-down list of fonts. Alternatively, type a list of fonts separated by commas. **Note:** It may be the case that the font you select here is not available on the respondent’s computer. Using the Remark Web Survey program options, you can select more than one font for your respondents. If the main font is not available on the respondent’s system, the backup fonts are used. Select the Application Button  and then choose Web Survey Options to choose backup fonts that display when the selected font is unavailable.
Font Bold	The **Font Bold** style property sets whether the font used for the question element is in bold format. Use True to set it to bold format and False to remove bold formatting.
Font Color	The **Font Color** style property sets the color for the font used for the question element. Click in the right portion of the cell to access a drop-down list of font colors.
Font Italic	The **Font Italic** style property sets whether the font used for the question element is in italic format. Use True to set it to italic format and False to remove italic formatting.
Font Size	The **Font Size** style property sets the size of the font used for the question element. Enter a numeric value. 10 is a typical number used for web forms; use a higher number for larger text and a lower number for smaller text.
Font Underline	The **Font Underline** style property sets whether the font used for the text in the question element is underlined. Use True to underline the answer element and False to remove underline formatting.
Indent Levels	The **Indent Levels** property sets the number of levels to indent the question element. One indent level equals one HTML space. As you increase the indent levels, the question element moves toward the right of the web form page.
Line Breaks After	The **Line Breaks After** style property sets the number of line breaks after the question element. Enter a numeric value to add line breaks after the element. Adding line breaks creates vertical space after the question.
Line Breaks Before Question’s Answers	The **Line Breaks Before Question’s Answers** style property sets the number of line breaks between the question element and the first answer element. Enter a numeric value to add line breaks after the element. Adding line breaks creates vertical space after the question.

Style Name	Description
Question Answer Columns	The **Question Answer Columns** style property sets the number of columns in which to place the answer elements (applies to checkbox and option button question types). If a question has a large number of answer choices, you may wish to put the answers in multiple columns.

Element Category: Sections

Style Property	Description
Column Border Color	The **Column Border Color** style property allows you to choose a color for borders between columns within a section (if borders are used). Click the arrow in the right portion of the window to drop down a list of available colors.
Column Border Visible	The **Column Border Visible** style property sets whether to display a border between columns in a section. This property only applies to sections that have more than one column. Borders can act as a visual separator between elements in the section. Set the value to True to display borders and False to hide borders.
Column Border Width	The **Column Border Width** style property controls the size of the border between columns by setting its thickness in pixels. Enter a numeric value; the higher the number, the thicker the border.

Element Category: Web Form

Style Property	Description
Error Highlight Color	The **Error Highlight Color** style property allows you to choose a color for error messages that are highlighted when respondents submit pages with missing/incorrect information (e.g., not answering a required question). Click the arrow in the right portion of the window to drop down a list of available colors. The default color is red.
Hyperlink Color	The **Hyperlink Color** style property sets the color to use for all hyperlinks on the web form. Click in the right portion of the cell to access a drop-down list of colors.

Using the Style Properties Window

There are several ways you can format web forms. In order to understand how formatting works, you need to understand the web form hierarchy and how style properties are passed down to the various web form elements.

When you look at a web form's tree view, you can think of it as a hierarchy. The web form is at the top, followed by Pages, Sections, Questions, Labels, Images or Lines, Multimedia and Answers. In hierarchical context, it looks like this:

Web Form

    Page

        Section

            Questions, Images, Labels, Lines, Multimedia

                Answers

When using style properties, there are two basic concepts. You can either format individual elements or you can choose a higher point in the hierarchy and then "push" the formatting down to the lower levels. Think of the top level as a parent and any levels beneath it as children. When you push a style property down, the children inherit the option from the parents. In the Style Properties window, you have two choices for applying style changes: an **OK** button and an **Apply Style** button.

The **OK** button can be used in two ways: It can apply changes made within the Style Properties window to the selected element. Or, when used at a higher level, it changes affected elements at that level or lower and apply to new elements that you create from that point on, if they are on existing pages.

- **Important Note:** When using the **OK** button in the Style Properties window, if a property is changed, all elements that had the **original** property's value will be updated with the new value. However, disparate elements will remain unchanged. The purpose of this rule is so that if you intentionally format an element in a special way, its formatting will not be overwritten accidentally.

For example, if you select a question and change the font from black to blue and then click OK, it will change the selected question to blue. However, new questions that you create will still use the style from the next highest level (e.g., the original color). In addition, other existing questions will not be changed to blue. This is all true because you selected one particular element to format. Another example is to select all Standard Pages, go to the Questions section of the Style Properties window and change the color from black to blue. In this scenario, after clicking the **OK** button, all of the questions on the selected pages that are black will change from black to blue. Any new questions you insert (on any existing standard page) will also be blue. New questions are affected in this case because you set the font color on a page level and pushed it down to the questions on those pages (whereas in the previous example, you only set it for one question). However, if you were to add a page to the web form, questions on that page would use the old style (black in this case) because new pages utilize the style set at the form level.

In contrast, the **Apply Style** button applies all of the settings within the Style Properties window to the selected element and its children (lower level elements). What you see in the Style Properties window is actually a Style Sheet. Therefore, using the Apply Style button takes all of those properties and applies them to the web form. In addition, any new elements that you create will use the updated style.

- **Note:** When using the **Apply Style** button, you still need to click the **OK** button to close the **Style Properties** window. In this circumstance, the OK button is just an added layer of confirmation to your changes (you can use OK or Cancel at this point).

Let's look at an example:

Suppose you have a 5-page web form where the style defined has page background set to gray. You decide that you want to change all of the existing background colors on your web form pages to blue. The easiest way to accomplish this is to select all web pages, go to the Style Properties window and change the background color at the Page level. In this case you would then click the **OK** button to apply the changes to the selected pages. If you were to create a new page, however, it would be gray because this is what is defined at the form level. If we change the scenario slightly and say you want to change all of the background colors from gray to blue and have new pages be blue as well, you could go to the form level, click the **Format** button, make the change and then click **Apply Style**. In this case, the existing pages would change to blue and any new pages would also be blue because you changed the style at the web form level.

In order to make the formatting as flexible as possible, you can also change individual elements without enforcing that change to apply to other lower level elements. Suppose you have one question that you want to stand out. While all the questions on the form are blue, you want this one to be red. You can go to the Style Properties window for that question only and change the color to red without affecting any other questions. Unless you go to a higher level in the tree and click the Apply Style button in the Style Properties window, this question will stay red. In addition, any new questions will still be the original style color of blue.

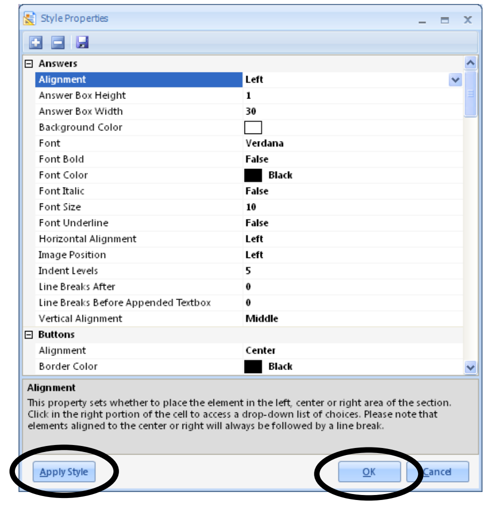
In summary, here is a list of the possible ways to use the Style Properties window:

- Select the **web form element** in the tree view (**the top node**), change the style properties and then click the **OK** button. Everything on the web form that had the original property value will be changed for any properties that were adjusted in the Style Properties window. Any style properties that were not touched will not carry down to the other elements on the web form. Any new items you insert will have the properties that you just adjusted using the Style Properties window. (Example: Go to Style Properties through the web form properties, change Question Color from Black to Blue, click the OK button. All questions on the form that *were originally black* will be blue, but any other settings that were in the Style Properties window that were not adjusted will not carry over to the web form. In addition, any questions that were not originally black will retain their color. Any new questions that you create will be blue.)
- Select the **web form element** in the tree view (**the top node**), change the style properties and then click the **Apply Style** button. Everything on the web form will be changed based on what is in the Style Properties window, regardless of what was actually changed in that same window. Anything new you add to the web form will also use these updated properties. (Example: Go to the Style Properties through the web form properties, change Question Color to Blue and click the Apply Style button. All questions on the web form will be blue, and in addition, everything on the web form will utilize all properties from the Style Properties window.)
- Select a **higher level element,** such as a page, change the style properties and click the **OK** button. The style properties that you changed will carry through to the selected items, and if you changed the style of elements below in the hierarchy,

they will change as well. Any properties in the Style Properties window that you did not adjust will not affect lower level items. (Example: Go to the Style Properties through a page properties window. Change Question Color from Black to Blue. All questions on the page *that were originally black* will be blue but any other settings that were in the Style Properties window that were not adjusted will not carry over to the web form. However, any new questions you add to this page will use the new Question Color (blue).

- Select a **higher level element**, such as a page, change the style properties and click the **Apply Style** button. The selected item (e.g., page) and any elements below it will utilize all of the properties in the Style Properties window. (Example: Go to the Style Properties through a page properties window. Change Question Color from Black to Blue and then click the Apply Style button. All questions on the page will be blue and in addition, everything on that page will utilize all properties from the Style Properties window. If you had set formatting options for an individual element (e.g., made one question green) the options will be reset to those that are defined on the page level (blue, in this case). In addition, new questions you add will also use the Question Color defined at the page level (blue in this case).
- Select an **individual element**, change the style properties and click the **OK** button. The style properties will only apply to the selected element. (Example: Go to the Style Properties through a question's properties window. Change the Question Color from Black to Blue. Only that question will turn blue. Any new questions you add will use the Question Color defined at the next higher level (black).
- Select an **individual** element, change the style properties and click the **Apply Style** button. The selected element will change and anything below that element will also change based on what was in the Style Properties window, regardless of what was actually changed. (Example: Go to the Style Properties through a question's properties window. Change the Question Color from Black to Blue. Only that question will turn blue. Any new questions you add will use the Question Color defined at the web form level (black). Anything else that was in the Style Properties window for questions and answers will carry through to that particular question. So if that question's answers happened to be green but the Style Properties window has answers set to black, that question's answers will now be black. Any new questions and answers you add will use the Question/Answer Color defined at the next higher level (black), as well as the other properties.
    - **Tip:** Here is a good rule of thumb to remember when using styles: When using the **OK** button in the Style Properties window, if a property is changed, all elements that had the **original** property's value will be updated with the new value. However, disparate elements will remain the same. The purpose of this rule is so that if you intentionally format an element in a special way, its style will not be overwritten accidentally. However, remember that **Apply Style** applies all formatting across the board.

The following sets of instructions help you apply formatting options to various parts of the web form.



To apply style properties to an entire form

1. Double click the **Web Form** node, which is the top node on the form.
2. Click the **Format** button.
3. Make the desired changes.
4. Click the **OK** button to accept the changes and apply them to the web form. Only properties that were changed are applied. Or click the **Apply Style** button to apply all of the settings in the **Style Properties** window to the entire web form.

To apply style properties to a web form page

1. Double click the **Page** node to which you want the style applied.
2. Click the **Format** button.
3. Make the desired changes.
4. Click the **OK** button to accept the changes and apply them to the selected web page. Only properties that were changed are applied. Or click the **Apply Style** button to apply all of the settings in the **Style Properties** window to the selected web page.

To apply the same style properties to multiple pages

1. Select the pages to which you wish to apply a new style. You may select multiple pages by clicking page nodes while holding down the **Ctrl** key. Or, you may select the beginning page node, hold down the **Shift** key and then select the ending page node to select a range of pages. To apply a change to all standard pages, select the **Standard Pages** container.
2. After selecting the page elements, right click and select **Properties**.
   - **Note:** Do not release the **Ctrl** or **Shift** key until after you right click the mouse.
3. Click the **Format** button.
4. Make the desired changes.
5. Click the **OK** button to accept the changes and apply them to the selected web pages. Only properties that were changed are applied. Or click the **Apply Style** button to apply all of the settings in the **Style Properties** window to the selected web pages.

To change style properties of an individual element

1. Select an individual element (button, label, line, image, multimedia, question or answer) by double clicking its node or by highlighting the element, right clicking and selecting **Properties**.
2. Click the **Format** button.
3. Make the desired changes.

4. Click the **OK** button to accept the changes and apply them to the selected element. Only properties that were changed are applied. Or click the **Apply Style** button to apply all of the settings for the selected element and any elements beneath (e.g., a question and its answers) in the **Style Properties** window to the selected element.

To change style properties of multiple elements

1. Select the elements you would like to change by holding down the **Ctrl** key and clicking an element to select multiple elements, or by holding down the **Shift** key and clicking a beginning and ending element to select a range of elements.
    - **Note:** You must select the same type of element to be able to change formatting options.
2. After selecting the elements, right click and select **Properties**.
    - **Note:** Do not release the **Ctrl** or **Shift** key until after you right click the mouse.
3. Click the **Format** button.
4. Make the desired changes.
5. Click the **OK** button to accept the changes and apply them to the selected elements. Only properties that were changed are applied. Or click the **Apply Style** button to apply all of the settings for the selected element and any elements beneath (e.g., a question and its answers) in the **Style Properties** window to the selected elements.

Formatting and Question Tables

Please note that many style attributes for a question table override the style attributes for individual questions/answers within the table. The following **question** properties do not have an effect on the visual display if the question is within a table. This is due to the fact that the properties are superseded by the table's style:

- Backcolor
- Alignment
- Indent Levels
- Line Breaks After
- Line Breaks Before Question's Answers
- Answer Columns

The following **answer** properties do not have an effect on the visual display if the answer is within a table. This is due to the fact that the properties are superseded by the table's style:

- Backcolor

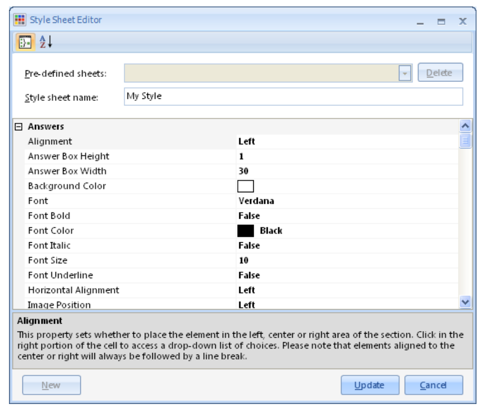
All other style properties do have an effect on the answer choice text (e.g., Good, Poor, etc.) and main table headers, utilizing the formatting as defined in the first question row.

Finally, the formatting options for the first defined answer column of a question table apply to all questions within the table.

Creating Style Sheets

When applying styles to web forms, you can utilize a style sheet. Style sheets can be saved and applied to multiple web forms. The style properties are the same as those defined in the Style Properties window. To save time and effort, you can reuse these styles by saving them as style sheets. Then you simply apply a style sheet to other web forms. You can still modify individual elements of a web form after applying a style sheet.

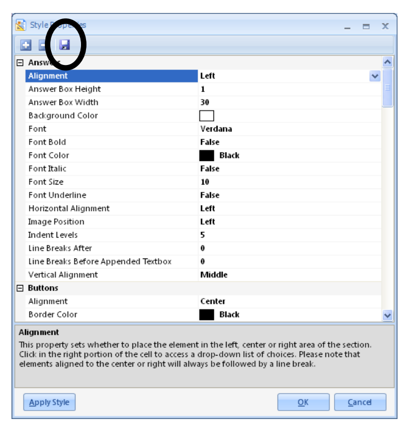
To create a style sheet using the Style Sheet Editor



1. From the **Home** tab in the Ribbon, click the **Dialog Box Launcher**  next to the word **Formatting**. The **Style Sheet Editor** window appears.
2. Click the **New** button.
3. All of the properties from the **Style Properties** window appear. Set properties as desired for each part of the web form.
4. Enter a name for the style sheet in the **Style sheet name** box.
5. Click the **Update** button to save your changes.
6. Click the **Close** button to close the window. The style sheet is now saved and can be applied to any web form in Remark Web Survey.

To create a style sheet using existing formatting options

If you have already created a web form and applied various formatting options to it, you can save those options as a style sheet so that you can reuse them on other web forms.

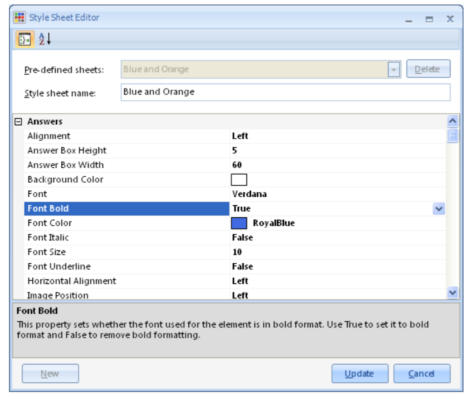


1. If not open already, open the web form that contains the formatting options you want to save as a style sheet.
2. Double click the web form name to access the **Properties** window.
3. Click the **Format** button.
4. On the toolbar of the **Style Properties** window, click the **Save** button . The **Style Sheet Editor** window appears.
5. Enter a name for the style in the **Style sheet name** box.
   - **Note:** If you want to update a style sheet that you have previously saved, begin typing the existing style sheet's name in the box. Remark Web Survey looks for matches based on the letters you type and show you a list of possible matches for updating.

6. Click the **OK** button to close the window.

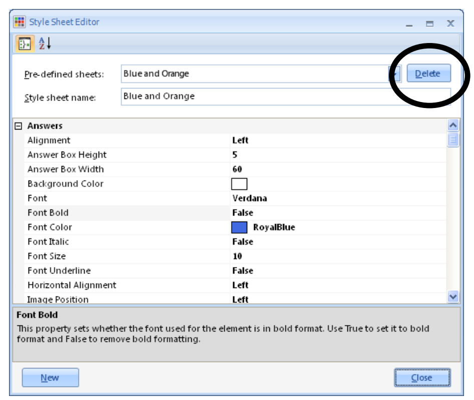
The style sheet is now saved and can be applied to any web form in Remark Web Survey.

To update an existing style sheet



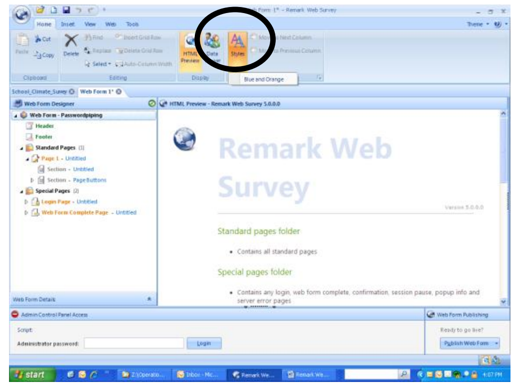
1. From the **Home** tab in the Ribbon, click the **Dialog Box Launcher**  next to the word **Formatting**. The **Style Sheet Editor** window appears.
2. Select the style sheet you wish to modify from the **Pre-defined sheets** list.
3. All of the properties you had previously set appear. Modify the properties as desired.
4. Click the **Update** button to save your changes.
5. Click the **Close** button to close the window. The updated style sheet is now saved and can be applied to any web form in Remark Web Survey.

To delete a style sheet



1. From the **Home** tab in the Ribbon, click the **Dialog Box Launcher**  next to the word **Formatting**. The **Style Sheet Editor** window appears.
2. Select the style sheet you wish to delete from the **Pre-defined sheets** list.
3. Click the **Delete** button to delete the style sheet.
4. When prompted, click the **Yes** button to delete the style sheet. (If you do not wish to delete the style sheet at this time, click the **No** button to return to the **Style Sheet Editor**.)
5. Click the **Close** button to close the window. The style sheet is now removed from the available style sheets.

To apply a style sheet to a web form



1. From the **Home** tab in the Ribbon, click the down arrow on the **Style Sheets** icon.
2. Choose the desired style sheet to apply to the active web form.
3. When prompted, click the **Yes** button to apply the style sheet. (If you change your mind and do not wish to apply the style sheet, click the **No** button.)
4. The style sheet is applied to the entire web form. You may still change individual elements if desired. However, if you reapply the style sheet, any individual elements are modified to match the style sheet.
    - **Note:** Style sheets do not override rich text formatting.

To share style sheets

If you want to share your style sheet with another Remark Web Survey user, you may do so as long as you have multiple licenses of the software. For example, you may create a style sheet that you want to use as a standard for all of the web forms you create. The style sheets that you create are stored as XML files in the software's installation directory. You can provide these XML files to another user and they can then apply the styles to forms they open in the Remark Web Survey Designer.

1. Locate the style XML files, typically stored in the **Style Sheets** folder of the Remark Web Survey installation directory (e.g., C:\Program Files (x86)\Gravic\Remark Web Survey 5\Style Sheets).
2. Copy the files to the same path on the other user's system.
3. Open Remark Web Survey. You should see all of the styles you copied over within the Styl**e Sheet Editor** and via the drop-down list for the **Styles** icon on the Ribbon.

Rich Text Formatting

Rich text provides advanced formatting options for the text on your forms. Using rich text allows you to apply formatting to individual portions of an element. For example, you can add bold formatting to a single word in a label for emphasis. Or, you can change the color of a single word in a question. You may also enter "www" to insert a hyperlink (e.g., if you type www.gravic.com and turn on rich text formatting, the text becomes a hyperlink).

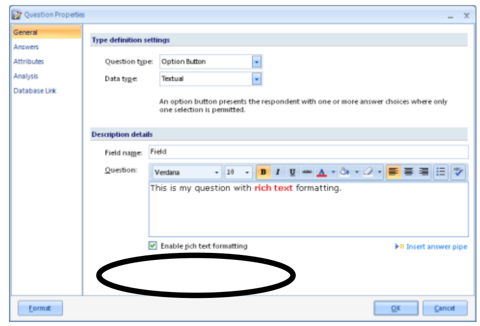
When using the rich text formatting window, you may select an entire word or set of words and change its attributes. Or you may select a single word. You may even select a single letter to format. If you click within a word but do not actually select anything, the entire word becomes formatted with the selected rich text options.

Note that rich text settings override any text formatting styles selected (e.g., if you have rich text formatting and apply a new style via the Style Properties window, the elements formatted with rich text do not acquire the new style settings).

When the rich text formatting option is turned on, some style properties are not available. When you click the Format button for any element that has rich text turned on, properties that can be modified while using rich text are available. All other properties are disabled.

To use rich text formatting for questions and labels

1. Insert a question, or label element. Or, double click an existing question or label element.
2. In the question or label text area, type the information you would like displayed.
3. Mark the checkbox for Enable rich text formatting.
4. Format the text as desired using the toolbar in the rich text window. You may adjust font selection, font attributes, such as bold and italics, font color, background color, alignment and create bulleted lists.
5. Modify or add the rest of the element properties (if necessary).
6. Click the **OK** button to save the changes.

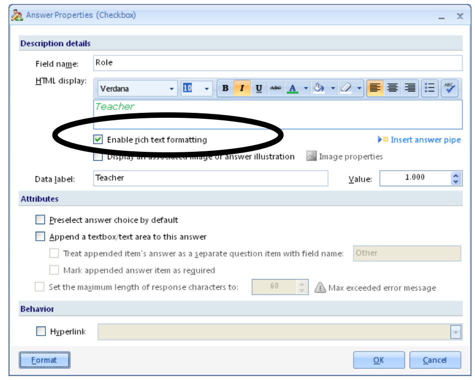


To use rich text formatting for answers

There are two ways to modify rich text formatting for answer elements:

To use rich text via the Question Properties window	**To use rich text via the Answer Properties window**
1. Insert a question element. 2. On the **Answers** screen, click in the cell containing the answer you wish to edit. 3. Click the link that reads Access current answer's properties.	1. Insert an answer element, or double click an existing answer element in the tree view.

4. In the **Answer Properties** window, you may apply rich text formatting to the **HTML Display** text. Type the information you would like displayed.



5. Mark the checkbox for **Enable rich text formatting**.
6. Format the text as desired using the toolbar in the rich text window. You may adjust font selection, font attributes, such as bold and italics, font color, background color, alignment and create bulleted lists.
7. Modify or add the rest of the element properties (if necessary).
8. Click the **OK** button to save the changes.
    - **Note:** It may be the case that the font you select here is not available on the respondent's computer. Using the Remark Web Survey program options, you can select more than one font for your respondents. If the main font is not available on the respondent's system, the backup fonts are used. Select the Application Button and then choose Web Survey Options to choose backup fonts that display when the selected font is unavailable.

Chapter 8: Using Question Branching

Overview

Remark Web Survey allows you to build branching into your web forms. Branching allows you to direct the respondent to another part of the web form based on how one or more questions are answered. For example, you might ask the following question:

Have you recently contacted our service department? Yes or No.

If the respondent selects "Yes" you may direct them to a series of questions about your service department. If the respondent selects "No" you may let them continue with the next question on the web form.

Branching gives you flexibility in form design so that you can better select questions targeted to your respondents. At the same time, it makes the form easier to fill out because the questions are tailored to the respondent.

Setting Up Branching

In order to use branching, you must first add pages and questions to the web form. You can then add branching references so that if particular responses are chosen, the respondent is automatically taken to a specific page of the web form.

- **Caution:** We strongly suggest that you first build the entire web form and then add branching. It is much easier to add branching once you have all of the questions/pages created. Note that branching is page specific, meaning that you can only branch to a question on a different page. If you change the web form at a later point, Remark Web Survey resolves the established branch patterns. However, for ease-of-use purposes, it is easier to create the branches with a completely built web form.

Branching is set up at the page level. Once you have set up the pages on the form, you can go back and establish the branching patterns.

- **Caution:** We strongly suggest that you make questions that are used in question branching "required" in the question attributes. A blank response for a question that triggers a branch pattern could cause unexpected results.

To set up branching

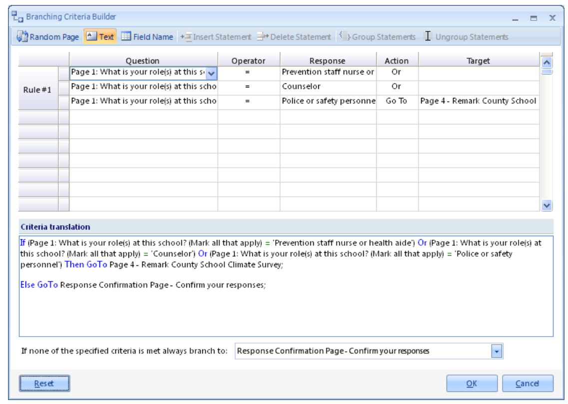
1. Double click the page node to which you want to apply the branching pattern(s).
2. Click the **Branching setup** link to view the **Branching Criteria Builder** window. The **Branching Criteria Builder** window consists of the following properties:

Property	Description
Random Page	Click the **Random Page** button to have the page appear in random page order each time it is accessed (this setting is useful when administering tests or trying to eliminate question bias). Typically you use the random option for all standard pages in the web form so that they all appear in a different order for each respondent.
Text	Click the **Text** button to display the question text for each question on the web form instead of field names (applies to the Question column of the branching grid). This setting depends on your personal preference as to how you would like the questions displayed. If this setting is not selected, the questions are listed in this window by field name.
Field Name	Click the **Field Name** button to display the field name for each question on the web form instead of question text (applies to the Question column of the branching grid). This setting depends on your personal preference as to how you would like the questions displayed. If this setting is not selected, the questions are listed by question text in this window.
Insert Statement	Click the **Insert Statement** button to insert a new statement within the branching grid. This feature is useful if you need to place a statement within other statements that you have already defined. Select an insertion point by clicking in a row first and when you click **Insert Statement**, the grid adds a row above your current selection point. It initially inserts the row as part of the selected statement. The **Rule Numbers** for the statements update themselves automatically as you begin to enter the criteria for the statement. You only need to use the Insert Statement function to add statements between other statements. If you are simply building a branching pattern from start to finish, use the rows of the branching grid in sequence on the screen.
Delete Statement	Click the **Delete Statement** button to remove a statement within the branching grid. Select a statement by clicking in a row and then when you click **Delete Statement**, the grid removes the selected statement(s).
Group Statements	Use the **Group Statement** option to group parts of the branch pattern (branching statements) together. This feature is useful when setting up multiple branch patterns on one page. It allows you to further customize the criteria that determine the branch pattern by grouping like statements together into one action.

Property	Description
Ungroup Statements	Use the **Ungroup Statements** option to ungroup parts of the branch pattern. Ungrouping statements can be accomplished once you have grouped statements, as described above. You can use the ungroup option to make changes.
Question	Displays the questions on the entire form. Use the **Question** list to select a question to which the branch pattern applies.
Operator	Displays the available operators for the branch pattern, which include = (equal to), <> (not equal to), > (greater than), < (less than), >= (greater than or equal to), <= (less than or equal to), starts with, ends with and contains. Select the item to which your branching pattern applies.
Response	Displays the response choices from the selected question. Select the **Response** choice that triggers the branch pattern or enter the appropriate text for a textbox/text area question. For example, if your choices are A, B, C and D and choosing C triggers the branching action, choose C from this list. Or, if it is a textbox style question, enter the text exactly as you expect your respondents to enter text in order to trigger the next action.
Action	Allows you to select the next action. Use **Go To** to set up a branch pattern that sends the respondent to another page on the web form when the particular response choice is selected. Use **And** to continue to set up branch patterns whereby the next pattern in the sequence *must* also be true in order to complete the branch. Use **Or** to continue to set up branch patterns whereby the next pattern in the sequence *may* also be true in order to complete the branch.
Target	Allows you to select the target action when using a Go To action. Use the **Target** column to select the page to which to branch based on the selected criteria.
If none of the specified criteria is met always branch to:	Allows you to set a page order. The default branch page is used in the absence of any user-defined branch patterns or if no branches are satisfied. Use the **Next Page in Sequence** option to have the respondent submit the web form in sequential page order when the branch criteria are not met.
Reset	Resets the current branch pattern, allowing you to start over. Note that all branching statements are removed when you click the Reset button.

Notice that there is a **Criteria translation** box below the branching options that displays your branch patterns as you build them. You cannot edit the text in this window, but you may use it to double check your logic when setting up your branch patterns.

3. If desired, select whether to view the questions in the Questions column of the branching grid by **Text** (question text) or **Field Name**.
4. In the **Questions** column, select the first question on which to base the branch pattern.
    - **Note**: You may resize the columns in this grid as you see fit.



5. In the **Operator** column, select the appropriate operator for the branch pattern (e.g., Q1 = Yes or Q1 <> No).
6. In the **Response** column, select or enter the question's response on which to base the branch pattern.
7. In the **Action** column, select the next action. If you want to add more parameters to the branch pattern, select **And** or **Or**, depending on whether the next criterion *must* be true (AND) or *can* be true (OR) in addition to the previous criterion. If you want the respondent to go to a particular page based on this question and response, select **Go To**.
8. If you have selected **Go To** in the **Action** column, select a page in the **Target** column. If you have selected **And** or **Or** in the **Action** column, leave the **Target** column blank.
9. Continue to add branch statements as needed. Notice that based on the operators used and other criteria, the row headers in the grid update with **Rule** numbers. The **Rule** numbers provide you with a quick way to see patterns in your branching criteria.
10. If desired, use the **Group Statements** and **Ungroup Statements** buttons to refine the branch patterns. For example, if two parts of the pattern belong together, you may select them in the grid and then click the **Group Statements** button. Click and drag the row headers to select items to group together. When statements are grouped, Remark Web Survey evaluates them together before going on to the next branch sequence.
11. When you are finished building your branch pattern, go to the **If none of the specified criteria is met always branch to** setting. In the **If none of the specified criteria is met always branch to** drop-down list, select the page to which respondents should be taken in lieu of any other branch patterns. Select **Next Page in Sequence** to have the respondent go to the next page on the web form when the current page is submitted. Otherwise, select the appropriate page to return to the respondent when this page is submitted.
12. Click the **OK** button to save your changes.
    - **Note:** When using branching with hidden questions that allow multiple responses, you do not have a drop-down list available in the Response column. You need to manually enter the valid responses separated by commas and enclosed in parentheses. Example:

If your branching pattern has a Day field that equals multiple days, your branching pattern may look like this:

Questions= “Day”

Operator= “=”

Response= “(Monday,Wednesday,Friday)”

Note that there are no spaces between answer choices.

You may have an unlimited number of branch patterns in your web form. Note that you receive a warning when attempting to publish a completed web form if the web form contains circular or broken references. A circular reference could put the respondent in an infinite loop when submitting the web form, indicating that you have not given them a way to submit the web form successfully based on their responses. Therefore, set up branching patterns carefully, ensuring a smooth transition from page to page regardless of the response chosen.

Branching Example

To help explain how branching works, we have included a sample below.

Suppose you are conducting an employee survey to assess your organization. On this survey, you want to ask some questions that pertain to managers, directors and vice presidents only. Your form contains three Standard pages and one Web Form Complete page. The Standard pages are called: *Page 1- Opening Page, Page 2- Manager Questions, Page 3- General Employee Questions*. On the first Standard page, you ask the following question:

What is your position: Associate, Supervisor, Manager, Director, Vice President.

In order to direct the respondents who select Manager, Director or Vice President to a separate set of questions, your branching is set up like this:

Question	Operator	Response	Action	Target
What is your position?	=	Manager	Or	
What is your position?	=	Director	Or	
What is your position?	=	Vice President	Go To	Page 2- Manager Questions
If none of the specified criteria is met always branch to:			Page 3- General Employee Questions	

This setup can be interpreted as:

If respondents select Associate OR Supervisor, they are directed to Page 3- General Employee Questions.

If respondents select Manager OR Director OR Vice President, they are directed to Page 2- Manager Questions.

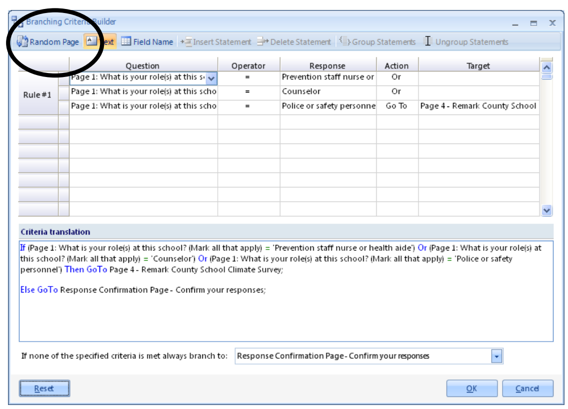
Random Page Order

You may choose to have web form pages appear in random page order for each respondent. Random page order helps to eliminate the likelihood of viewing others' responses as well as question bias based on the order in which questions are presented. Randomization is turned on in the **Branching Criteria Builder** window.

- **Note:** When using random page order, you should not place a back button on the web form's pages.

To set up random page order

1. Double click the page node to which you want to apply the branching pattern(s). Remember that if you want all of your standard pages to appear in random order, you should apply the random branching pattern to all pages. You can multi-select pages by holding down the **Ctrl** key while clicking the page node in the tree view with the mouse (do not release the Ctrl key until you perform the next action, such as right clicking and choosing Properties). You can also select all standard pages by clicking the **Standard Pages** container node in the tree view.
2. Click the **Branching setup** link.
3. Click the **Random Page** button in the upper left hand corner of the window.
4. Click the **OK** button to continue.
   - **Note:** Random page order occurs in groups. For example, you could have pages 2, 3 and 4 appear randomly for each respondent. This means that this group of three pages appears randomly each time the web form is accessed. Any sequential pages that you set to the Random setting are placed in one group. Therefore, you could have multiple groups of randomized pages. For example, suppose you have a 10-page web form and you set pages 1-3 to be random and 6-9 to be random. Two groups of random pages are created, meaning that pages 1-3 would always randomize, then 4-5 would always appear next, then 6-9 would always be randomized.

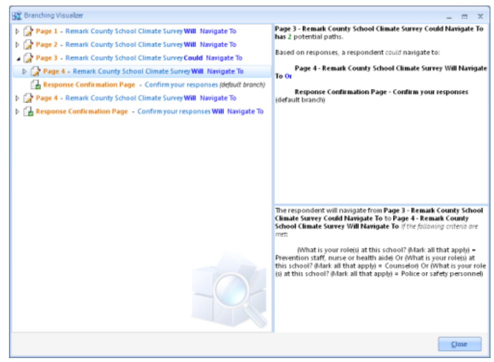


Branching Visualizer

Remark Web Survey includes a Branching Visualizer that displays the branching patterns you have set up in one concise window. This feature provides a way for you to review all of the branching you have set up on a web form in one place. Then you can go back to individual web form pages and make modifications if necessary.

To use the Branching Visualizer

1. Before utilizing the Branching Visualizer, set up your branching patterns, as described previously in this chapter.
2. From the Ribbon select the **Tools** tab.
3. Locate the **Branching References** icon and then drop-down the arrow at the bottom.
4. Click Branching Visualizer.
5. The pages of the web form are listed on the left. Expand any page by clicking the right arrow to the left of the page name.



6. Each page name is followed by **Will Navigate To** or **Could Navigate To**. If you see **Will Navigate To**, there is no explicit branching on the page and the default setting of going to the next page in sequence is in place. If you see **Could Navigate To**, it is likely that branching is set up on the page.
7. Each branching pattern is displayed in the right side of the window. When you click a page on the left, you see the possible pages that can be branched to on the right. To dig deeper, if you click the page sub nodes beneath the top level page, you see the questions and responses that trigger the specific branch to that page.
8. When you have finished reviewing the branching patterns, click the **Close** button to close the Branching Visualizer.

You cannot make changes to the branching patterns in this window. If you see a problem, close the Branching Visualizer and then go to the page that contains the problem and make the necessary adjustments. You can always return to the Branching Visualizer to review the updates.

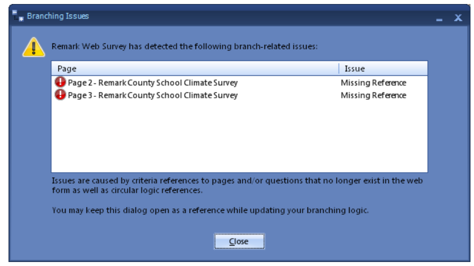
Branching Validator

Remark Web Survey includes a Branching Validator that checks an entire web form for invalid branching patterns. It looks for circular references and branches to pages or questions that do not exist. In other words, it looks for branching patterns that simply do not work because they are not properly set up. Remember that only you know the questions on your web form and how you want respondents to navigate the form. You are responsible for ensuring the accuracy of the branching patterns. Remark Web Survey ensures the functionality of the branching patterns that you have established.

To use the Branching Validator

1. Before utilizing the Branching Validator, set up your branching patterns, as described previously in this chapter.
2. From the Ribbon select the **Tools** tab.
3. Click the Branching References icon.

4. Remark Web Survey checks the entire web form for invalid branching patterns. Please note that for long/complex forms, this process may take a few moments.
5. If no problems are found, Remark Web Survey displays a message box stating that no issues were found; click the **OK** button.



6. If problems are found the **Branching Issues** window appears. This window displays any pages where branching problems exist, as well as the issue found (e.g., missing reference or circular branching).
7. You should go back to the page(s) displayed and make the appropriate adjustments in the **Branching Criteria** window. You may leave the **Branching Issues** window on the screen for reference. Note that the majority of branching problems result from setting up a branch pattern and then later removing a question or page that was part of the branch criteria.
8. Once you have made the appropriate adjustments, run the **Branching Validator** again to ensure all of your branch patterns will execute successfully.

Chapter 9: Administering Web Forms

Administering Web Forms Overview

Remark Web Survey allows you to host the web forms that you create in the software on your own Windows or Linux/Unix web server. By hosting the web forms yourself, you have complete control over the administration of the web forms and their data. There are no limits in terms of number of web forms that can be published at one time or number of responses allowed (unless you define a limit in the web form's properties). Administering forms is accomplished with the Perl scripts provided with the software. The **administration script, rwsad5.pl** (also known as the Remark Web Survey Control Panel), allows you to publish web forms and download or view the data submitted from those web forms. Each web form you create in Remark Web Survey is published to your web server, which can be accomplished automatically or manually. Automatic publishing of web forms places the entire contents of the web form (e.g., pages, images, etc.) in a folder on your web server. All data are collected in the same folder. The end result is that each individual web form has its own location on the web server for organizational purposes. Alternatively, manual publishing of forms requires you to go through a separate form installation process via the administration script.

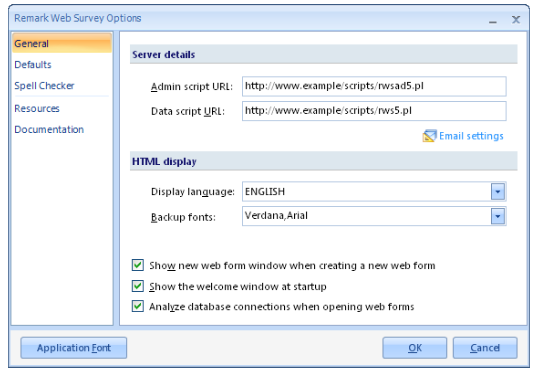
Once the administration script is up and running, you can begin publishing web forms. The data are collected via the **data script (rws5.pl)**. Installing the scripts is covered in Chapter 2: Installing the Software. Your website administrator should install the scripts and verify that they are working properly. However, anyone with proper permissions can access the administration script to publish forms and download data.

Setting Up Default Script Locations

Remark Web Survey web forms are often created and published by different people. To streamline the form publishing process, you should set up the default locations for the Remark Web Survey scripts within the Designer component of Remark Web Survey, making it possible for people creating web forms to publish the forms without the intervention of the website administrator. When these options are set up properly in the designer portion of the software, the location of the data collection script is written to each HTML file you create, which allows proper web form submission. This topic is covered in greater detail in Chapter 2, but the basics are repeated below.

To enter the script URLs in the Designer Component

1. In the Remark Web Survey Designer Component, select the **Application Button** and then click **Web Survey Options**.
2. Under **Server details**, enter the **Admin script URL** and the **Data script URL**. Both URLs must be fully qualified URLs (e.g., http://www.example.com/cgi-bin/rwsad5.pl). Your website administrator, or the person who installed the Remark Web Survey Server component, should be able to provide these URLs to you.

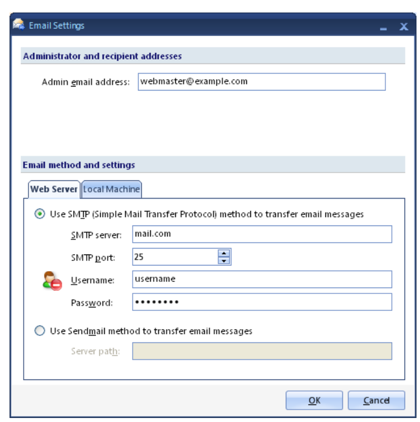


To set email settings in the Designer Component

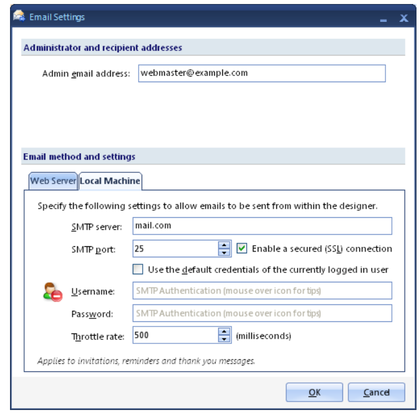
In Remark Web Survey, emails can be used for three different functions: 1) the built-in email client that is used to send web form invitations and reminders, 2) submission notification emails that are sent every time a web form is completed by a respondent, or 3) pause page reminders to resume a web form once it is started and stopped. You can use an SMTP server (Simple Mail Transfer Protocol) or a Sendmail server to send emails from Remark Web Survey. These two types of setup are simply different methods of sending email. Please note that the built-in email client only works with an SMTP mail server. If your web server is configured to use a local Sendmail server, Remark Web Survey can utilize the Sendmail server for sending submission emails or for sending pause page email reminders to respondents who have paused a web form in progress.

Setting up and configuring email servers is independent of Remark Web Survey. Once you have determined the type of email method to use and verified your email server is working, you can configure Remark Web Survey to use it. To set up the email functionality in Remark Web Survey, you likely need the assistance of your web server or network administrator. This person should be able to tell you the information that Remark Web Survey requires, such as the names of the servers and ports that they use.

3. Continuing from Step 2 above, click the link titled **Email settings**.
4. Enter the **Administrator email address**. This email address is often the webmaster of the website, but can be any email address of your choosing. It should be someone who is familiar with Remark Web Survey and in a position to troubleshoot any web form issues that may arise.
5. Under **Email method and settings**, first set up the **Web Server** email settings. Web server email is generated for email messages that are transferred by the web server, such as form submission emails, advanced notification emails and pause page reminders.
6. Choose the type of email configuration you are using: **SMTP** or **Sendmail**.



7. If using SMTP, enter the **SMTP server** and the **SMTP port**. The SMTP port is usually 25 but may vary with your email server.
8. [Optional] If authentication is required, enter the **Username** and **Password**.
9. If using Sendmail, enter the **Server path** (e.g., /usr/sbin/sendmail).
10. Next, set up the **Local Machine** email settings. The local machine is used for emails that are generated from the local computer, such as web form invitations and reminders.
11. Enter the **SMTP server** and the **SMTP port**. The SMTP port is usually 25 but may vary with your email server.
12. [Optional] If using a secure connection, mark the checkbox for **Enable a secured (SSL) connection**.



13. [Optional] If you need to use authentication, you can enter credentials or use those of the user. Mark the **Use the default credentials of the currently logged in user** checkbox to utilize the user's credentials (e.g., the person logged in when sending the emails from the Remark Web Survey Designer component). Otherwise, continue to Step 14 to enter specific credentials.
14. [Optional] If authentication is required, enter the **Username** and **Password**.
15. Enter a **Throttle rate** or accept the default setting (500 ms). The throttle rate specifies how many milliseconds to wait before sending the next email in the queue. This setting helps prevent the email server from becoming overloaded when sending a large number of emails.
16. Click the **OK** button to save the options.
    - **Note:** Please review Chapter 2 for detailed information about requirements when using server authentication.

Each new web form you create now uses these properties. If you need to change any of this information for an individual web form, you can do so within the web form's properties. See Chapter 4 for further information about editing an individual web form's properties.

The Remark Web Survey Control Panel

The Remark Web Survey Control Panel appears each time you access the administration script (rwsad5.pl). The Control Panel allows you to administer web forms, including managing data files, manually installing web forms and obtaining a quick overview of a web form's statistics (Remark Live Stats™). You may access the Control Panel in one of two ways:

- From within Remark Web Survey, select the **Web** tab from the Ribbon and then click **Control Panel**.
- From a web browser, enter the URL to the administration script (e.g., http://www.example.com/cgi-bin/rwsad5.pl).

A username and password is required to gain access to the Control Panel. The default username is **administrator** and the default password is **rws**, but the password may have been changed during installation (we recommend changing the password for security reasons). The person who installed the Remark Web Survey Server component sets up the administrator password. There can only be one account named administrator that accesses the Control Panel. You may make other accounts with various privileges using different usernames. Each user who is able to publish forms and download data automatically from the Designer component needs a username and password, which is entered in the Admin Control Panel access area of the Designer component. Please see Chapter 2 for detailed information about setting up user accounts.

Once you log in to the Control Panel, you have several options related to web form and data administration (these options vary based on your permission level). You may perform the following functions from the administration Control Panel:

Tab	Feature	Description
Server Setup	Default form directory	Specifies a default directory for storing all active web forms. If using the auto publish feature, each time you publish a web form, the form is automatically published to the web server and a new sub-directory is created in the Default form directory. If using the **Create Publish Package** form of publishing, which is a manual process, you have to place each installed web form and its components in the Default form directory. Each form has its own sub-directory. **Caution:** This directory should be a non-public directory for optimum security. The Remark Web Survey scripts must be able to read, write and delete information to and from this directory. If you do not set up a default form directory, the CGI directory is used.
	Image script name	Specifies the name of the image script used to handle the publishing of web form images. This script is supplied with Remark Web Survey and should be uploaded to your CGI directory. By default, this script is called rwsimg5.pl. However, if your web server uses the .cgi extension for scripts, you may change it to rwsimg5.cgi. Do not change the name of the file up to the extension.

Tab	Feature	Description
	Enable automatic publishing	Allows for automatic publishing (uploading) of forms directly from Remark Web Survey to the web server. When users click the **Publish Web Form** button in the Designer component (after supplying a valid Control Panel username and password), the forms are automatically uploaded to the Default form directory and installed on the web server. This action eliminates the necessity of a website administrator's intervention to post web forms on your web server. If you do not enable automatic publishing, users have to use the Create Publish Package method of posting web forms. A webmaster (or similar) needs to place the published forms on the web server and install them via the Remark Web Survey Control Panel.
	Enable automatic downloads	Allows for automatic downloading of data directly into Remark Web Survey from the web server (after supplying a valid Control Panel username and password). This action brings the data directly into the software, where it can then be analyzed with Remark Quick Stats® or exported. If you do not allow automatic downloading of data, you need to download the data from the Control Panel in a web browser and then open it in Remark Web Survey.
	Enable respondent logging	Allows for a log file to be kept for each form submission, showing the unique ID, IP address, date and time of the submission, as well as whether it was successful. If a problem occurs, it is listed in the log file (e.g., the respondent could not login due to an invalid password). Generally speaking, you want to enable respondent logging in case a problem arises.

Tab	Feature	Description
	Use CGI for form redirections	The **Use CGI for form redirections** setting applies when you redirect a respondent in your Web Form Complete page. Web Form Complete pages can simply be links to another page. This is called redirection. Enable **the Use CGI for form redirections** setting to redirect the user utilizing the CGI's built in redirect method. If you do not use this setting, Remark Web Survey uses a basic HTML redirection. This setting is enabled by default. You should only change this setting if redirection is not working using the default setting.
	Enable data backup during uploads	Use the **Enable data backup during uploads** option to automatically create a backup of the data file when a form is published to the web server and the user selects to overwrite the data. A file called "archivedatetime.bak" is created. If needed, you can rename this file with a .rwd extension to restore your data. **Note:** this setting is only available when publishing forms from the Designer component (not when deleting data via the Control Panel). It does not back up the log file or temporary files.
	Define local IP address for SMTP	Use the **Define local IP address for SMTP** setting to change the client-side IP address used by Perl when making a socket connection to an SMTP server. This feature is useful if a computer has multiple IP addresses so that you can ensure the correct one is being used.
Web Forms	Select form	Use the **Select form** drop-down list to select a currently installed web form and then choose the desired actions listed below.

Tab	Feature	Description
	Install Form	Use the **Install form** button to install web forms when automatic publishing is not enabled. If you do not publish your web form automatically, you must first use the **Create Publish Package** method to generate the web form, place it manually on your web server in the **Default form directory** and then install it via the Remark Web Survey Control Panel. After clicking Install Form, enter the form name exactly as it appears in Remark Web Survey (the form name is the top node of your web form when opened in the tree view of the designer) and then click the **Install Form** button.
	Access Form	Use the **Access Form** button to launch the live web form in your web browser. This feature is useful if you need to test a web form. Note that the web form displays in a new window. If you have pop ups blocked you may need to update your web browser to allow pop ups for this site.
	View Log	Click the **View Log** button to view the current log file for the selected web form. The log file holds information about each submission, such as the date, time and success or failure.
	Download Log	Click the **Download Log** button to download the current log file for the selected web form. You can open the resulting file in a text editor, such as Notepad.
	Reset Log	Click the **Reset Log** button to reset the log file for the selected web form. Resetting the log file removes any log file entries for web form submissions up to this point. Note that once you reset the log file you are not able to get it back.

Tab	Feature	Description
	Remove Form	Use the **Remove form** option to uninstall a web form. Select the desired web form from the drop-down list and then click the **Remove Form** button. This action is appropriate when the web form is no longer active. This option does not physically remove the web form and its components from the web server unless you select the checkbox for **Remove server files**. However, respondents are no longer able to access the web form.
	Remove server files	Mark the **Remove server files** checkbox to remove all web form-related files from the web server (e.g., HTML files, images, data file, log file) when removing a web form. Note that you are not able to get the files back once you remove them. Ensure that you have downloaded your data file prior to removing a form and its server files.
Data & Stats	Select form	Use the **Select form** drop-down list to select a currently installed web form and then choose the desired actions below.
	Remark Live Stats	Click the **Remark Live Stats** button to view current statistics for each question on the web form. The statistics are updated dynamically each time you click the button. You may also print the results. See Chapter 11 for detailed information about Remark Live Stats.
	View Data	Click the **View Data** button to view the current data for the selected web form. **Note:** If a question is set to **Treat each answer choice as a separate question**, the data appear as one question in this view. When downloaded, the data are output to separate data cells.

Tab	Feature	Description
	Download Data	Click the **Download Data** button to download the current data for the selected web form. The data is in a format called .rwd. Do not change it from this format. The Remark Web Survey designer is able to open this data file, allowing you to export it to another format or analyze it within the software. When downloading data, be sure that the file extension remains .rwd in your browser's Save window.
	Incomplete Data	Click the **Incomplete Data** button to download any data submissions that were not completed. Incomplete data resides on the web server when someone starts to complete a web form but never finishes it. You may open this data into the Remark Web Survey Designer component and then determine how much of the web form must be completed in order to include the incomplete submissions in the analysis. See Chapter 10 for more detailed information.
	Reset Data	Click the **Reset Data** button to reset the data file for the selected web form. For example, you may test your web form before allowing respondents to submit it; you can use the Reset Data button to clear out your test data. Or, you can use the Reset Data button for cyclic web forms that you collect data on repeatedly. Once one term is completed, you can download and save the data, clear it and then start over again. Note that once you reset the data you are not able to get it back. Ensure that you have a local copy of the data before resetting the data.

Tab	Feature	Description
Users	Add User	Click the **Add User** button to add user accounts to the Control Panel. The default user account is administrator. This account is used when publishing forms and downloading data. You can create other access accounts and set the permissions for those accounts. When you click the Add User button, enter a Username and Password for the new account. Then set the permissions: *Administrator:* User has full access to the Control Panel. *Standard User:* User can only view statistics and data, but for all installed forms. Optionally, user can be allowed to publish web forms automatically and download data from the Designer component. *Restricted User:* User can only view statistics and data for the web forms that you select. Optionally, user can be allowed to publish web forms automatically and download data from the Designer component for the specified web forms.
Password		Click the **Password** section to change the password used to access the Remark Web Survey Control Panel. Enter the old password, the new password and then confirm the new password.
Diagnostics		The Diagnostics information assists with troubleshooting server issues. It is primarily used by Gravic Support. Problems with script permissions are enumerated here. This area also shows all installed web forms, along with a test email button to ensure email functionality is working. The SMTP Test Script area is used to troubleshoot email issues; Gravic support can instruct you on how to use this section. Finally, a link to the Remark Web Survey test script (rwstest5.pl) is available for more detailed troubleshooting. Please install and launch this script in order to provide these details to Gravic Support when having server (script) issues.

Resetting the Default Administrator Control Panel Password

There may be a reason you need to completely remove the stored administrator password for the Remark Web Survey Control Panel (e.g., the current password is lost, the person responsible for administration leaves and you do not know the password, etc.). The password is stored in a configuration file (rwsem5.cfg) that can be safely deleted if necessary.

- **Note:** The password configuration file should only be deleted by the website administrator or another qualified individual.

To delete the Administrator Control Panel password

1. Using an FTP program, logon to your web server. Or, if your web server is in-house, logon to the web server computer.
2. Locate the file called **rwsem5.cfg** in your Remark Web Survey config directory. **We suggest backing up the file before you delete it.**
3. Delete the rwsem.cfg file. This resets the administrator password to the default password, which is **rws**. The next time you access the Remark Web Survey Control Panel, you are prompted to change the password for the administrator account.

Publishing Web Forms - Automatic Web Form Publishing

Once you have created a web form in Remark Web Survey, you need to publish it to your web server. There are two ways to publish forms:

- Automatic: Clicking the Publish Web Form button in the Remark Web Survey designer.
- Manual: Clicking the drop-down arrow on the Publish Web Form button and choosing Create Publish Package in the Remark Web Survey designer.

The automatic publish option makes it easier for you to move the web forms from a local system to the web server without the assistance of a website administrator. In order to publish web forms automatically, this option must be enabled in the Remark Web Survey Control Panel (see Chapter 9 for further details) and the user must have a Control Panel login with automatic form publishing enabled (see Chapter 2 for further details). In addition, the current user must have the appropriate permission level to access your web server. Your website administrator is responsible for setting permission levels on your web server. If you do not have permission to access your web server, you need to manually publish files to the web server. This topic is covered in Chapter 9.

If automatic form publishing is enabled, when a user clicks Publish Web Form in the Designer component, the web form and all of its related files, such as images, multimedia and configuration files, are posted to the web server in an individual folder. This folder is created in the **Default form directory** that is specified in the Remark Web Survey Control Panel.

- **Caution:** The **Default form directory** should be a non-public directory for optimum security. The Remark Web Survey scripts must be able to read, write and delete information to and from this directory.

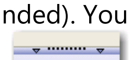
For example, if the Default form directory is C:\Inetpub\surveys, each time a web form is published using the Remark Web Survey designer, a new folder is created in the C:\Inetpub\surveys folder. If a web form is called “satisfaction_survey” a folder called satisfaction_survey is created in the surveys folder. The satisfaction_survey folder contains the HTML pages of the web form, any related image files, configuration files and, as the web form is submitted, the data files, log files and unique IDs of each respondent. Note that the data script (rws5.pl) needs to be able to write data to this directory each time a web form is submitted. Therefore, the Default form directory should be set up with permissions that allow the data script to read, create, write and delete information.

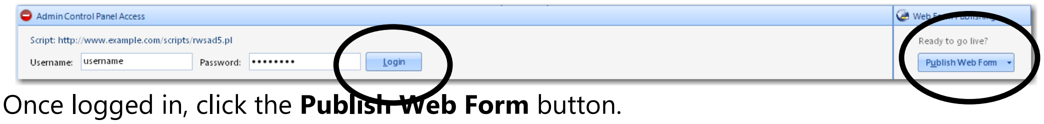
Once the publish process completes, the web form is ready to use. You do not need to install the web form separately.

To allow automatic web form publishing (enabled by default)

1. Log in to the Remark Web Survey Control Panel in a web browser (rwsad5.pl script) using an account with administrator privileges.
2. If you have not yet configured a default form directory, in the box titled **Default form directory**, enter the path of the folder where you would like all web forms to be published. You have full control over the path you choose. It can be any location on your web server.
    - **Caution:** The **Default form directory** should be a non-public directory for optimum security. The Remark Web Survey scripts must be able to read and write information to and from this directory.
3. Mark the checkbox for Enable automatic publishing.
4. Click the **Update** button to set the configuration. You should receive a message indicating that the configuration change was successful.

To publish web forms automatically

1. Create a web form in the designer portion of Remark Web Survey.
2. When completed, expand the **Admin Control Panel Access** bar at the bottom of the 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. Login 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. After the web form is published, a window appears showing you the URL to your web form and asking if you would like to view the web form in a web browser. If you click Yes, your default web browser opens the web form and you see the URL that your form uses. You must provide this link exactly as it appears in this window to the respondents who are submitting the web form (e.g., if you are sending an email to direct respondents to your website to submit the form, give them this link. Or, if you are putting a link on your website to the form, use this link). This link is in the format of: **http://www.example.com/cgi-bin/rws5.pl?FORM=formname**, where cgi-bin is the CGI/script directory on your website, rws5.pl is the Remark Web Survey data script and formname is the name of the web form being submitted. You can copy the web form URL to the Windows clipboard at any time by clicking the **Copy Web Form URL to Clipboard** link in the **Web Form Details** section of the Remark Web Survey designer. Copying the link is useful if you are adding a link to your web form on a page of your website or placing it in an email message. For example, you can open an existing website page in an HTML editor, copy the link from Remark Web Survey and then paste it into the appropriate location on your website page. When you upload your website page, the link is available for respondents to reach your form.
6. Click the **Yes** button to view the form online or click the **No** button to return to the designer.
   - **Tip:** If using a password protected web form, it is possible to embed the user's password within the link you send out to submit your web form. Embedding the password allows the respondent to simply click the link and go right to the web form without having to enter a password. The password can still be added to the data file and used to track which respondents have submitted (or not submitted) the web form. Use the following syntax to embed the password in a link: http://www.example.com/cgi-bin/rws5.pl?FORM=name&PWD=password, where "password" is the actual password for the respondent. This syntax only applies when sending email outside of Remark Web Survey. If you are using the built-in email center see Chapter 9 to learn how to embed passwords into the URL or email invitation.

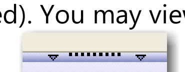
Overwriting Existing Web Forms

If a web form already exists on your web server, when you attempt to publish it again, you are prompted to overwrite the existing web form. You may choose to only overwrite the existing HTML pages, or you may also overwrite the existing data file, log file and temporary files. If you overwrite the data, log and temporary files, you are not able to recover log and temporary files. This action resets the data and log files on the web server, deleting the existing files. Note that a backup of the **data file only** is created if this setting is turned on in the Remark Web Survey Control Panel (it is on by default; see Chapter 9). The backup file's syntax is "archive-datetime.bak" (e.g., archive-20144101415.bak, where "2014410" is April 10, 2014 and "1415" is 2:15PM). Ensure that you have downloaded any data and/or log files you wish to keep prior to overwriting them. The temporary files include data from partially completed forms. Whenever a respondent accesses your web form, a UID (unique identifier) is created. This UID file tracks respondents so that they can pause the web form and come back to it at a later time. Once again, ensure that these UID files are no longer needed before selecting to overwrite the data, log and temporary files.

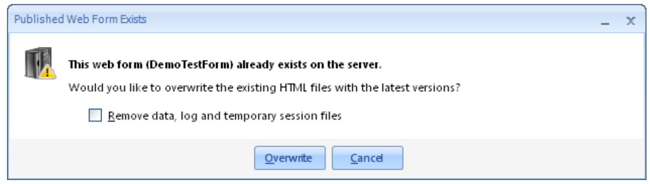
For password protected web forms, a password file is published to the web server in the Default form directory. This file contains the allowed passwords in an encrypted state along with the number of uses allowed for each password. When you publish and overwrite a web form that uses passwords, you have three options for handling the password file:

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 are added. If passwords do not exist in the file you are publishing, but do exist on the web server, they are removed from the web server. In short, whatever exists in the file you are publishing is what ends 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 is not 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 is used on the web server. This option resets passwords *and* 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 is used. Anything listed in the password area of the web form you are publishing is ignored. Use this option when you want to make a change to the form that does not affect the passwords; this method allows you to publish web form changes without affecting any passwords that may have already been used.

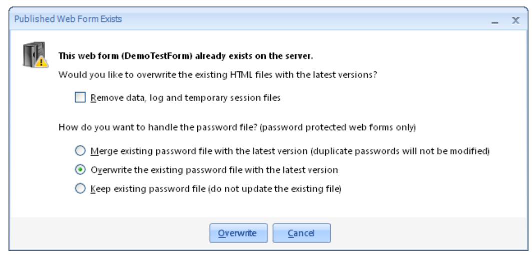
Overwriting existing web forms

1. 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**.

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



3. Once logged in, click the **Publish Web Form** button.
4. 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 (see previous explanation of this option). Use extreme caution when choosing to remove these files. You are not able to get the log files or temporary files back.
5. [OPTIONAL] If using a password protected form, select how you would like to handle the password file, as described previously (Merge, Overwrite or Keep).



6. 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.
7. After the web form is published, a window appears 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.

Create Publish Package - Manual Web Form Publishing

If you choose not to allow automatic web form publishing all web forms have to be published (uploaded) manually and then installed via the Remark Web Survey Control Panel. When using the manual publish process, you create a publish package. This process combines all of the files needed to administer the web form into one folder. During the publish process, you select where that folder should be stored locally. You may then move the contents of the folder to the proper location on your website (e.g., via an FTP program or, if your web server is in-house, by copying the files to the web server).

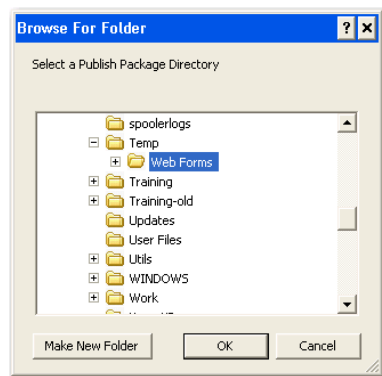
If you primarily design web forms but are not involved in the server side of the process, you need to get your website administrator involved at this point. Once the publish package is created, you can provide the folder that is created to the website administrator to post on the web server. It is strongly recommended that your website administrator reads this section of this user's guide.

- **Note:** Using the **Create Publish Package** feature requires that you create the appropriate sub-directory under the **Default form directory** on your web server specified in the Remark Web Survey Control Panel. The entire contents of the directory that is created during the **Create Publish Package** process should be placed in the **Default form directory** (e.g., copy the folder to the Default form directory). If the files are not placed in this directory, web form submission will not work correctly. Please do not rename any files in the folder or the folder itself.

- **Tip:** Remember that if you are using an FTP program to upload files to your web server, HTML, configuration (.cfg) and text files need to be uploaded in ASCII format. Images and multimedia files should be uploaded in Binary format.

To use the Create Publish Package feature

1. Create a web form in the designer portion of Remark Web Survey.
2. When completed, select the **Application Button** , then select **Publish** and then click **Create Publish Package**. Alternatively, expand the **Admin Control Panel Access** bar at the bottom of the 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**. Click the down arrow on the **Publish Web Form** button and then select **Create Publish Package**.



3. In the **Browse for Folder** window, choose a location in which to store the web form and related files. Remark Web Survey creates a subfolder in this folder containing the files. This location can be directly on your web server if you have access, or a temporary holding place (you can move the files to your web server later).
4. Click the **OK** button to save the files.
5. If not already completed in Step 3, move the files to the **Default form directory** on your web server (e.g., use an FTP program to move the files from your local system to your web server). See your website administrator for assistance.
    - **Note:** Do not change the names of the folder or files that are created by Remark Web Survey.

Once you have created the publish package, you must manually install the web form before it can be used.

- **Note:** The manual form installation process only applies to forms that are published using the **Create Publish Package** method. Automatic publishing using the **Publish Web Form** option does not require separate form installation.

To install web forms

1. After placing the web form and related files on your web server in the specified **Default form directory**, access the Remark Web Survey **Control Panel** in a web browser (rwsad5.pl script). You may access the Control Panel by selecting the **Web** tab from the Ribbon and then choosing **Control Panel** from within Remark Web Survey, or by entering the URL of the Remark Web Survey administration script (rwsad5.pl) in a web browser.
2. You need to log in with an account that has administrator privileges to install web forms. Enter the username in the **Username** box and the password in the **Password** box and then click **Login**.
3. Click the **Web Forms** tab.

4. Click the **Install Form** button.
5. In the box titled **Enter form name** enter the name of the web form that you wish to install. The form name must be entered exactly as it appears in the top node of your web form in the designer portion of Remark Web Survey (including capitalization). It is not the name of the .rwsx file.

6. Click the **Install Form** button to complete the web form installation. You should receive a message indicating that the web form was successfully installed.
   - **Note:** If the installation is not successful, check the name of the web form that you entered. Incorrectly typing the web form name is the most common cause of form installation errors. Remember that it must be entered exactly as it appears in the Remark Web Survey Designer component (not the name of the .rwsx file).

Your web form is now ready for use. You need to provide a link to your web form in order for respondents to access it (typically you send an email to direct respondents to your website to submit the form or put a link on your website to the form). The web link should be in the following format: **http://www.example.com/cgi-bin/rws5.pl?FORM=formname**, where cgi-bin is the CGI/script directory on your website, rws5.pl is the Remark Web Survey data script and formname is the name of the form being submitted.

- **Note:** You may also click the **Copy Web Form URL to clipboard** link, which is located in the bottom of the **Web Form Details** window, to copy the link to the Windows clipboard. Copying the link is useful if you are adding a link to your form on another page of your website or placing it in an email message. For example, you can open an existing website page in an HTML editor, copy the link from Remark Web Survey and then paste it into the appropriate location on your website page. When you upload your website page, the link is available for respondents to reach your form.

Removing Installed Web Forms

Web forms can be removed when they are no longer needed. Removing a web form with the Remark Web Survey Control Panel removes the form's properties from the rwsad5.cfg file, making it unavailable on your web server. You may also optionally remove all web form related files from the web server.

- **Caution:** Before removing all files, be sure you have downloaded a copy of your data and any other files you might need.

To remove forms

1. Login the Remark Web Survey **Control Panel** in a web browser (rwsad5.pl script). You need to log in with an account that has administrator privileges to remove web forms.
2. Click the **Web Forms** tab.
3. Select a form from the **Form** drop-down list.
4. If desired, mark the **Delete Server Files** checkbox. When selected, all files, including data, are removed from the web server.
    - **Caution:** Enabling **Delete Server Files** deletes all web form related files from the web server, including data files, log files and temporary session files. You are not able to recover these files.

5. Click the **Remove Form** button to remove the web form.
6. A confirmation page appears. If you are certain you want to remove the web form, click the **Yes** button to continue. The web form is permanently removed.

Emailing Web Form Invitations

Remark Web Survey includes an email client to allow you to send invitations and reminders to your respondents. This feature is most useful when using password protected web forms where you have entered email addresses in the password list builder. However as long as you know your respondents' email addresses, you can use the built-in email client. The email client utilizes your SMTP server to send email. You must have an SMTP server configured outside of Remark Web Survey to use the email client.

When you send email invitations, an email is automatically generated that contains the link to your web form. You then add the recipients to the message. If you are using a Login page where you have entered email addresses, the addresses are included in the outgoing email automatically. You may also append the password to the web form link so that respondents do not need to type in a password to access the form. You may modify the subject line and body of the email; however do not modify the link to your web form. If you change this link, respondents are unable to access your web form. Merge fields can be added to the email, such as a username and password that can be pulled from your password list. You can also create email templates to be reused for commonly used web forms.

The Send Invitations function is used to invite people to submit your web form or to send reminders to those who have not submitted the web form. Reminders are covered in the Respondent Detection section of this user's guide in Chapter 10.

- **Note:** If you are using Query Parameters and want to send emails from Remark Web Survey, use the **Advanced** option on the **Send Invitations** button. Please see Chapter 5 for detailed information about using the Advanced options. Then return to this section for generic information about the email window.

To send email invitations for non-password protected web forms

1. Before attempting to send emails, ensure that your SMTP server information is set up in Remark Web Survey, as outlined in Chapter 2. The **Local Server** settings apply to email invitations.
2. Create a web form in Remark Web Survey as you normally would, publish it to your web server and test to make sure it works as expected. When you are ready to send invitations to your respondents, continue to step 3.
3. From the **Tools** tab of the Ribbon, select **Send Invitations**. The **Email Message** window appears.
4. Use the **To** section to enter email addresses of your respondents. You have two options for entering the email addresses:
   - Manually type in the email addresses. Separate the email addresses with a semi-colon (;).
   - Import a list of email addresses from a database. Supported databases include Access, dBase, Excel, FoxPro, Paradox and ODBC. Click **Database connection settings** to set up a connection to an external database containing the desired email addresses.

a) Choose the type of database you wish to use from the **Type** drop-down list.

b) Click the Open folder button to select the database containing the desired information.

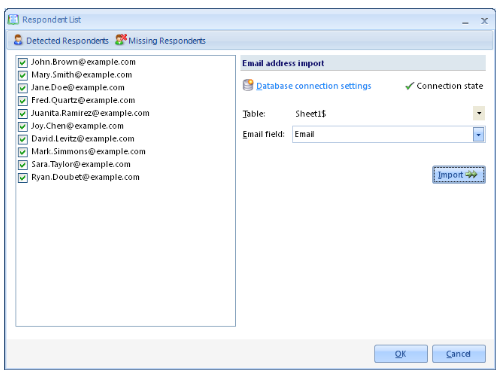
c) [Optional] If you are using an ODBC connection, choose the DSN from the **DSN** drop-down list. Mark whether it is **Directory based** or **DSN based**.

d) [Optional] If your database requires a login, enter the **Username**.

e) [Optional] If your database requires a login, enter the **Password**.

f) **Note:** The 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.

g) [Optional] You may optionally click the **Test Connection** button to test whether you can connect to this database.



h) Click the **OK** button to return to the **Respondent List** window.

i) Use the **Table** list to select the table from your database that contains the email addresses you wish to import.

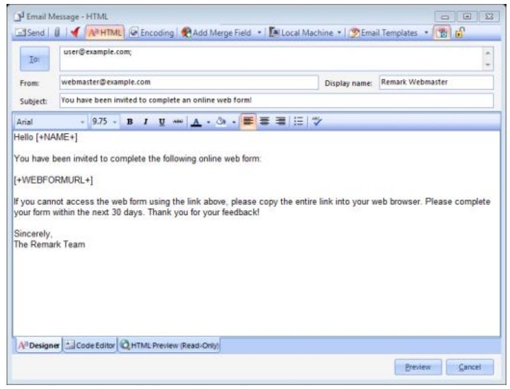
j) Use the **Email field** list to select the field in the connected database that contains the desired email addresses.

k) Click the **Import** button.

l) Click the **OK** button to the prompt that tells you the emails were imported successfully.

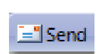
m) Click **OK** to close the window. You should see all of the email addresses you imported in the **To** line of the email.

5. The **From** address is filled with the web form administrator address that was entered in the web form's properties. Accept the default or enter a new email address.



6. The **Display name** defaults to the first half of the From address. You may put any name you like. This name appears as the Sender with the corresponding email address (e.g., Webmaster (webmaster@example.com).
7. Accept or modify the **Subject** line of the email.
8. At this point you can either manually alter the body of the email or apply an email template. If you wish to apply an email template, click the **Email Templates** button and choose the desired template. Email templates are covered in detail in Chapter 9.
9. [Optional] Use the options on the toolbar to customize your message, if desired. You may add an attachment , send the email with **High Importance** 

or format the email in **HTML** 

.
10. [Optional] If desired, click the **Local Machine** button to choose which email server to use to send the emails (this is uncommon). The Local Machine settings can be added at both a program level and a web form level. If the two server settings differ, you can use this button to choose which server you wish to use. If the two do not differ, the server information entered is used by default.
11. [Optional] Add merge fields to the email by clicking the **Merge Field** button. Merge fields allow you to personalize the email by adding in keywords that are merged when the email is sent. For non-password protected forms, the only option is the Web Form URL. If you accidentally remove the URL, you can use this option to add it back into the email. You can also use this option to position the URL in a different place within the email. Select an insertion point in the body of the email, click **Merge Field** and then choose the Web Form URL.
12. When you have the email formatted as desired, click the **Send** 

button to send the emails. They are sent in a batch mode so as not to overload your email server. Respondents receive the email in the format that is set up in their email client. They can either click or copy the link to your web form that is included in the body of your email message.

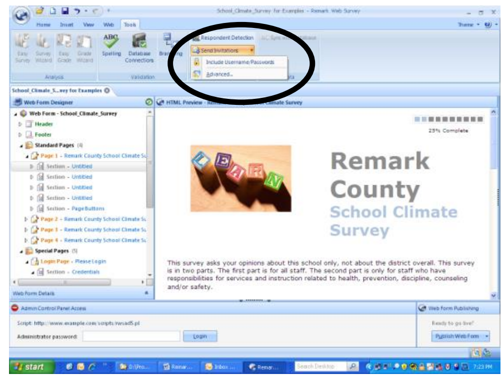
To send email invitations for password protected web forms

1. Before attempting to send emails, ensure that your SMTP server information is set up in Remark Web Survey, as outlined in Chapter 2. The **Local Server** settings apply to email invitations.
2. Create a web form in Remark Web Survey as you normally would, including a Login page, publish it to your web server and test to make sure it works as expected. If you include additional information in the Login page, such as names and email addresses, you are able to utilize it when sending emails. When you are ready to send invitations to your respondents, continue to step 3.

You have two options for getting passwords (and usernames if in use) into your respondents' hands:

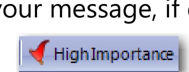
- Embed them into the web form URL. Embedding the username and password into the web form URL means respondents are automatically logged in when they click the URL. The username and password information is encrypted in the URL.
- Add Merge Fields to the body of the email that tells respondents their password (and username, if using one).

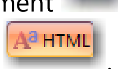
You can do one or both of the above options. Even if you embed login information in the URL you may wish to make respondents aware of their password in case they need it later.



3. [Optional] If you wish to embed the password into the URL, from the **Tools** tab of the Ribbon click the down arrow on the **Send Invitations** button and choose **Include Username/Password**. You will not notice the username and password embedded in the invitation URL. However, when the emails are sent, this information is included in an encrypted format.
4. If you do not wish to include the username/password into the URL, from the **Tools** tab of the Ribbon click the **Send Invitations** button.

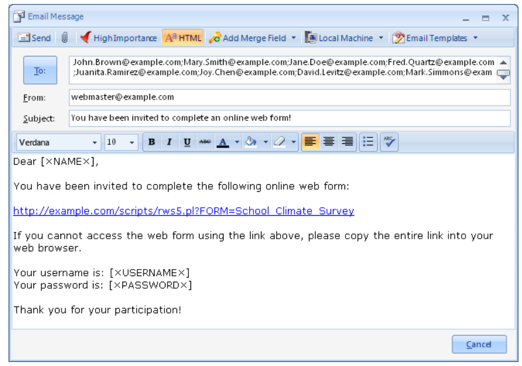
The **Email Message** window appears.

5. Use the **To** section to enter email addresses of your respondents. When using a password protected web form if you have entered email addresses in the password list builder screen, the **To** section of the email is automatically filled with your respondents from the **Password list builder** window.
6. [Optional] If desired, you may input more email addresses by either typing them in manually (separated by a semi-colon (;)) or by importing the passwords from an external database. Please see the previous set of instructions for importing passwords (**"To send email invitations for non-password protected web forms"**).
7. The **From** address is filled with the web form administrator address that was entered in the web form's properties. Accept the default or enter a new email address.
8. The **Display name** defaults to the first half of the From address. You may put any name you like. This name appears as the Sender with the corresponding email address (e.g., Webmaster (webmaster@example.com).
9. Accept or modify the **Subject** line of the email.
10. At this point you can either manually alter the body of the email or apply an email template. If you wish to apply an email template, click the **Email Templates** button and choose the desired template.
11. [Optional] Use the options on the toolbar to customize your message, if desired. You may add an attachment , send the email with **High Importance** 

or format the email in **HTML** 

.

12. [Optional] Click the **Local Machine** button to choose which email server to use to send the emails (this is uncommon). The Local Machine settings can be added at both a program level and a web form level. If the two server settings differ, you can use this button to choose which server you wish to use. If the two do not differ, the server information entered is be used is used by default.
13. [Optional] Add merge fields to the email by clicking the **Merge Field** button. Merge fields allow you to personalize the email by adding in keywords that are merged when the email is sent. For password-protected forms, you can add **Web Form URL**, **Username**, **Password** and/or **Name** merge fields. Select an insertion point in the body of the email, click **Merge Field** and then choose the desired merge field. To use username merge fields, you must have marked the checkbox to include a username on the Login page properties screen. To include a name, you must have defined names in the **Password builder list**. Note that passwords are not encrypted when inserted as merge fields so that respondents can see their password.

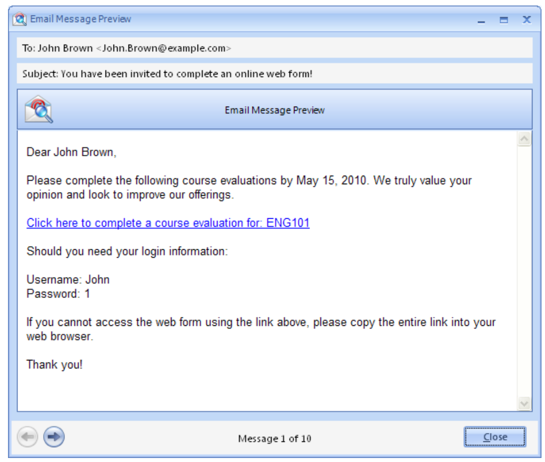


14. When you have the email formatted as desired, click the **Send**  button to send the emails. They are sent according to the throttle rate defined in the web form properties. Respondents receive the email in the format that is set up in their email client. They can either click or copy the link to your web form that is included in the body of your email message. If you chose to embed the password into the URL, passwords are embedded as emails are generated and sent (behind the scenes).
    - **Tip:** Respondents with a text only email client may not see actual hyperlinks in their email messages. When sending a hyperlink through email, it is recommended that you include instructions that explain to respondents that they can copy the link and paste it into a web browser if the hyperlink does not automatically take them to the web form.
    - **Tip:** You can use the email client to send thank you notices to respondents as well. If you wish to send thank you notices from Remark Web Survey, you will need to alter the subject and body of the email message. When the email client is launched using the Send Invitations button, the email is formatted as an invitation to take your web form. The email text can be easily modified to thank respondents for submitting your web form.

Email Preview

An email preview option is available 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 are 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

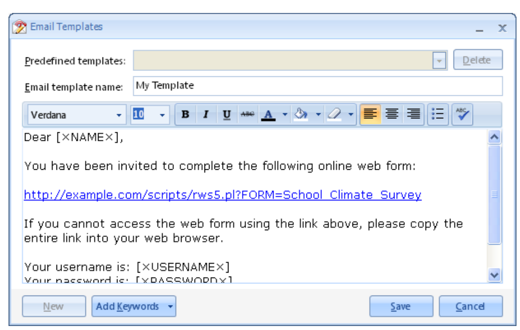


1. Format your email as desired using either the Advanced Email Wizard or regular invitation window.
2. When you have the email just as you want it, click the Preview button in the lower right corner of the window.
3. Use the arrow keys in the lower left corner to move forward and backward through the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

Email Templates

You can create and save email templates to save time when you tend to send the same information or reuse web forms. Once you have an email formatted the way you want it, you can save it as a template file. Or you can do all of the formatting within the Email Templates window. Email templates save the information contained in the body and subject line of the email.

To create an email template

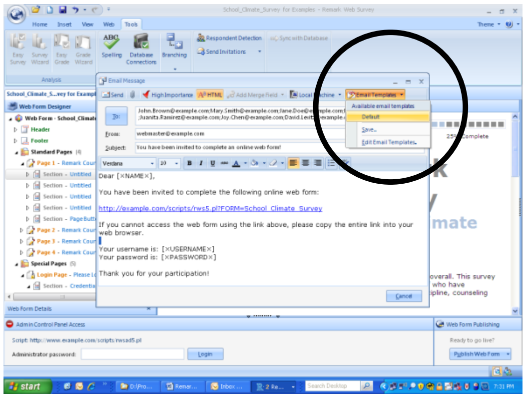


1. From the **Tools** tab of the Ribbon, select **Send Invitations**. The **Email Message** window appears. (We suggest you put together a real email for a web form as you want it to appear, and then save a template for it.)
2. Format the body of the email as desired.
3. Click the **Email Templates** button.
4. Click the **Save** button.
5. Enter a name for the email template in the box titled **Email template name**. If you wish to overwrite an existing email template, start typing the name of the exiting template and Remark

Web Survey attempts to auto-populate this textbox for you based on templates you have previously saved.

6. [Optional] Make any adjustments to the body or subject of the email (if you did not do so in Step 2). You may also add merge fields at this step by clicking the **Merge Fields** button.
7. Click the **Save** button to save the email template.

To apply an email template to an email invitation



1. Open a web form and prepare it for emailing.
2. When you are ready to send email invitations, from the **Tools** tab of the Ribbon, select **Send Invitations**. The **Email Message** window appears.
3. Click the **Email Templates** button.
4. Choose a template from the list.
5. Format the rest of the email, including setting up the **To** list.
6. Click the **Send** button to send the invitations.

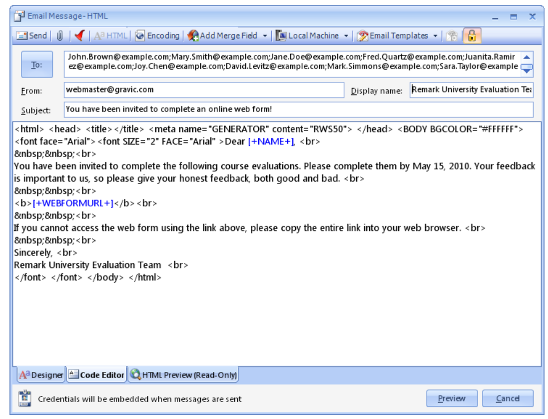
Advanced Email Tools

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 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 lose the changes you made in the Code Editor view (you receive a warning when switching tabs).
- **HTML Preview:** The HTML Preview tab shows you what the email looks 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.

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**.
3. **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.



4. 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 reverts any changes you made in the **Code Editor**. You receive a warning if you click the **Designer** tab.
5. [Optional]. If desired, save the modified email as a template by clicking the down arrow on **Email Templates** and then **Save**.
6. 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).

Chapter 10: Collecting Data

Overview

Once a web form is created, published and installed, you are ready to start collecting data. The **data collection script (rws5.pl**) you specified when creating the web form (see Chapter 4) handles collecting the submissions for you. Data can be downloaded via Remark Web Survey or via a web browser. By using Remark Web Survey, you can analyze the data in Remark Quick Stats or export it to another analysis package.

Remark Web Survey provides a Data Viewer window for the collection of data. The Data Viewer window contains a spreadsheet style grid containing the downloaded data. You can open previously downloaded data files or download a new data file in the Data Viewer window.

Data is stored on the web server in a proprietary format called a .rwd (Remark Web Data) file. Once data is downloaded, it is moved to a .rwa (Remark Web Archive) file so that later you can have options of downloading all data (rwa) or only new records (.rwd). You may also download incomplete form submissions (respondents who started to fill out the web form but never completed it).

Downloading Data in Remark Web Survey

When downloading data from within Remark Web Survey, you may take advantage of the software's data export and/or analysis features. Downloading data from within the software involves logging into your web server, downloading the data and loading it into the Data Viewer window.

- **Note:** You must have a Remark Web Survey Control Panel login that allows for automatic data downloads. See Chapter 2 for more information about user accounts.

Before you can download data into Remark Web Survey, you must have the **Enable auto downloads** feature set in the Remark Web Survey Control Panel. (By default, this feature is turned on.)

To enable auto downloads

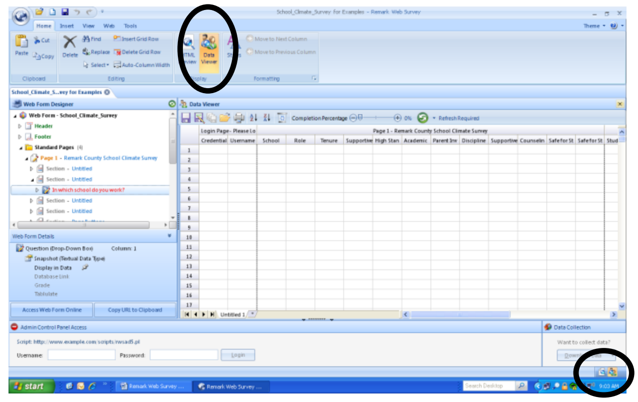
1. Log in to the Remark Web Survey **Control Panel** in a web browser (rwsad5.pl script) using an account with administrator privileges.
2. Mark the checkbox for **Enable automatic downloads**.
3. Click the **Update** button.

In order to download data directly into Remark Web Survey you must enter the correct administration URL in the form's properties and have a Remark Web Survey Control Panel login with automatic data downloading enabled (see Chapter 2 for information about user accounts). The data download function utilizes Internet

Explorer to authenticate your login on the web server. Therefore, you must have Internet Explorer 8 or later installed and configured correctly if you wish to download data from within Remark Web Survey. It does not need to be your default web browser, but you do need to be able to connect to the Internet via Internet Explorer. Your network administrator should be able to assist you with this process.

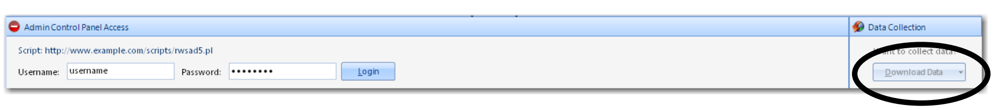
To download data in Remark Web Survey

1. Open the web form in Remark Web Survey.
2. Open the **Data Viewer** by either clicking the **Data Viewer** button in the status bar or by selecting the **Home** tab from the Ribbon and then clicking **Data Viewer**.



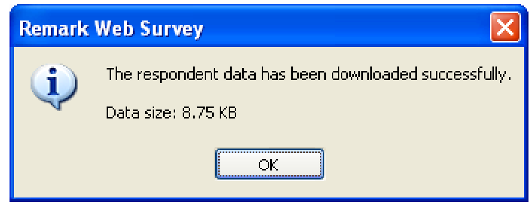
You see a spreadsheet style grid with columns containing the field names from each of the questions on your form. Each page of your web form is separated by a dashed line.

3. There are two ways to download data:
   - Expand the **Admin Control Panel Access** bar at the bottom of the window (if it is not expanded already) by selecting the **View** tab and marking the **Admin Control Panel Access** checkbox. In the **Admin Control Panel Access** bar, login with your **Username** and **Password** and then click the **Download Data** button. All of the data on the web server for this web form is downloaded. In addition, if you click the drop-down arrow on the **Download Data** button, you may choose **New Data Only**. The **New Data Only** option only downloads new submissions since the last time data was downloaded for this web form. Note that you are not able to access the Download Data button in the Admin Control Panel Access bar until you successfully log in to the administration script (Control Panel).



   - Select the **Application Button**  and then click **Download**. All of the data on the web server for this web form are downloaded. If you are not currently logged into the Remark Web Survey Control Panel, the **Admin Control Panel Access** bar automatically expands at the bottom of the window. Enter your **Username** and **Password**, and then click the **Login** button. After logging in, go back to the **Application Button** and then click **Download**.
4. Once the data downloads, a confirmation window appears. Click the **OK** button.

- **Note:** If using Database Link fields, these fields are processed when Remark Web Survey opens or downloads a data file directly from the web server.

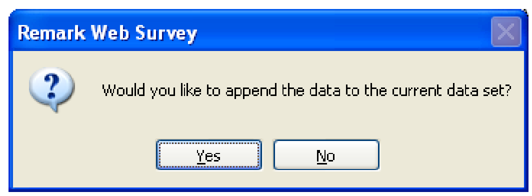


Remark Web Survey logs in to your web server and retrieves the data. Each line in the data grid is filled with one respondent's submission. Each time you download data, you receive the entire file if downloading all records.

At this point, you may save the data to another format or analyze the data in Remark Quick Stats. See Chapter 10 for further information about data export, and the Remark Quick Stats User's Guide PDF file, located by clicking Start|Programs|Remark Web Survey 5|Documentation, for further information about using Remark Quick Stats.

Appending Data or Downloading New Submissions Only

If you have already collected data for a web form and saved it to file, you may optionally open that data and then download new data submissions. Whenever you have data open in the Data Viewer grid, the download process prompts you to add downloaded data to the existing data set. Follow the instructions in the previous section to download data. After the data is downloaded, you receive a message asking if you wish to append the data to the current data set. Click the **Yes** button to add the new data to the existing records in the active data grid. Click the **No** button to download the data to a new Data Viewer grid.



Alternatively, you can click the down arrow on the **Download Data** button and choose **New Data Only**. This option only downloads records that have not been downloaded since the last time you downloaded. You can then save that data to its own file or append it to an existing file (click the Save As toolbar button on the Data Viewer, then choose Save As and select the existing file).

- **Note:** If you append records to an existing data set when you download data, you still need to save that data set locally in order to finish combining the data (e.g., save it as a Remark (RMK) file). You can save the combined data from the toolbar in the Data Viewer.

Downloading Incomplete Data Submissions

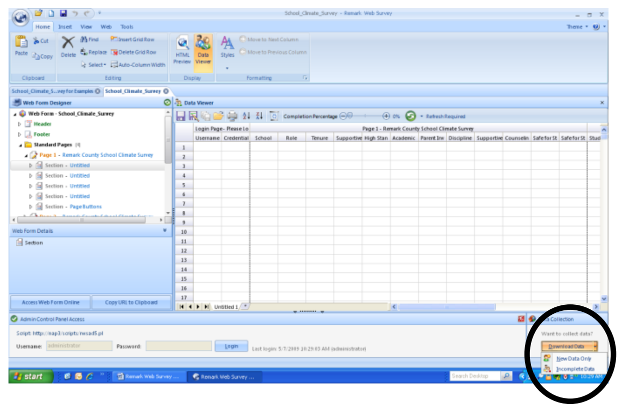
Remark Web Survey allows you to download partial data submissions, which occur when someone starts to fill in a web form but never completes it. They may have filled in a page or two and then never completed it, or they may have paused the web form and never returned to finish it. By default, incomplete submissions are not downloaded with the regular data.

If you plan to include incomplete data submissions use caution with the *Remove respondent's incomplete data from the server* setting. This setting removes incomplete submissions after a specified amount of time (days or minutes). The scripts check for incomplete submissions to remove whenever interaction with the data (rws5.pl) script occurs. If you remove incomplete data submissions, you are ot able to download incomplete data later. Please see Chapter 4 for a complete description of removing incomplete data submissions.

In order to download data directly into Remark Web Survey you must enter the correct administration URL in the form's properties and have a Remark Web Survey Control Panel login with automatic data downloading enabled (see Chapter 2 for information about user accounts).

To download incomplete data submissions

1. Open the web form in Remark Web Survey.
2. Open the **Data Viewer** by either clicking the **Data Viewer** button in the status bar or by selecting the **Home** tab from the Ribbon and then clicking **Data Viewer**.



3. Expand the **Admin Control Panel Access** bar at the bottom of the window (if it is not expanded already) by selecting the **View** tab and marking the **Admin Control Panel Access** checkbox.
4. In the **Admin Control Panel Access** bar, login with your **Username** and **Password** and then click the down arrow on the **Download Data** button and choose **Incomplete Data**. Any incomplete data submissions are downloaded to the data grid.
5. Click the **OK** button to complete the process.

You may now save this data to its own file or an existing data file. See Chapter 10 for information about saving data.

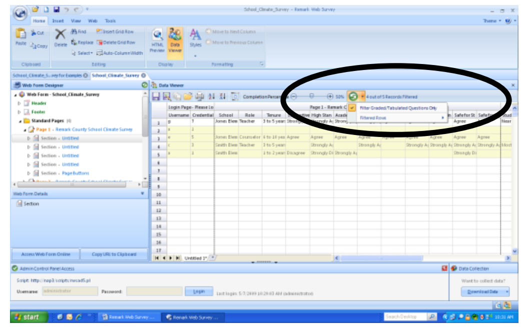
Completion Percentage

When viewing incomplete data submissions, you can utilize the Completion Percentage feature to determine how much data must be present in order to analyze the records. The Completion Percentage is a slider that you can move from 0 to 100%. Remark Web Survey then analyzes each record and determines the percentage of data present. If the record does not meet the specified percentage, it highlights it in yellow. You can then determine what you want to do with this data (e.g., delete it, include it in analysis, etc.). In addition you can specify whether to look at all questions on the web form or only those that are tabulated/graded in the question properties when analyzing the Completion Percentage.

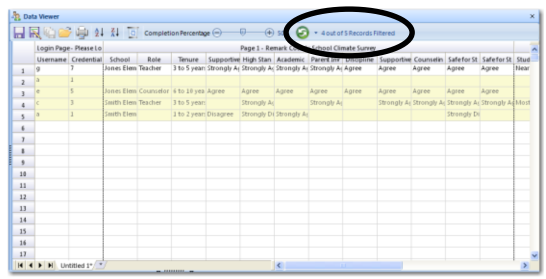
To use the Completion Percentage feature

1. Open the web form in Remark Web Survey.
2. Open the **Data Viewer** by either clicking the **Data Viewer** button in the status bar or by selecting the **Home** tab from the Ribbon and then clicking **Data Viewer**.

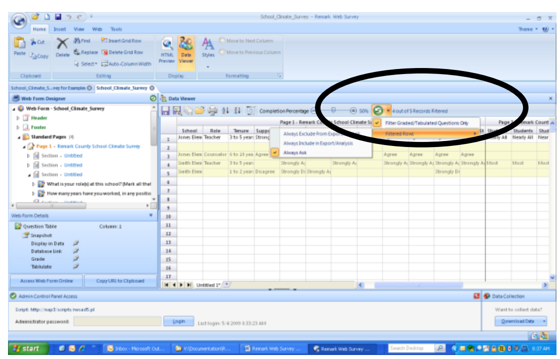
3. Expand the **Admin Control Panel Access** bar at the bottom of the window (if it is not expanded already) by selecting the **View** tab and marking the **Admin Control Panel Access** checkbox. In the **Admin Control Panel Access** bar, log in with your **Username** and **Password** and then click the down arrow on the **Download Data** button and choose **Incomplete Data**. Any incomplete data submissions are downloaded to the data grid. Alternatively, if you have already completed this step and have the data saved on your computer, open that data file.
4. Locate the **Completion Percentage** in the toolbar of the Data Viewer.



5. First, determine whether you want to include all questions or only those that are set to grade/tabulate (this option is set on an individual question basis in the Analysis portion of the properties window). By default, only graded/tabulated questions are included. To view or change this setting, locate the **Refresh** button. Click the down arrow on the **Refresh** button and then check or uncheck **Filter Graded/Tabulated Questions Only**.



6. Use the slider on the **Completion Percentage** scale to move to the desired percentage of complete data.
7. Click the **Refresh** button. The data is filtered based on whether it meets your completion percentage. Any data records not meeting the percentage are highlighted in yellow.
8. Determine whether you want to grade/tabulate the filtered records. Click the down arrow on the **Refresh** button and then click **Filtered Rows**. You have three options from which to choose:



- *Always Exclude From Export/Analysis:*
  The data are not included if you save to a file or run any analysis options.
- *Always Include in Export/Analysis:*
  The data are included if you save to a file or run any analysis options.
- *Always Ask:*
  You are prompted whether to include the filtered data when you save data or run analysis options.

9. You may now either save the data to a file or run an analysis option. Please see Chapter 10 for information about saving data and Chapter 11 for information about analyzing data.
   - **Note:** If desired, you can delete the data rows that do not meet your completion percentage. This action deletes the data locally, not on the web server. To delete

the records, highlight the entire record(s), click the **Home** tab on the Ribbon and then click **Delete Grid Row**.

Incomplete data submissions can also be downloaded from the Remark Web Survey Control Panel (rwsad5.pl script). Please see Chapter 10 for information about downloading data through the Control Panel.

Downloading Data Through a Web Browser

An alternative to downloading the data directly in Remark Web Survey is to use your web browser to access the Remark Web Survey Control Panel and view or download the data file to a location on your computer. The web browser interface also gives you the option of deleting data. The Control Panel is accessed through the rwsad5.pl script.

Accessing the Control Panel from a web browser can be accomplished in one of two ways:

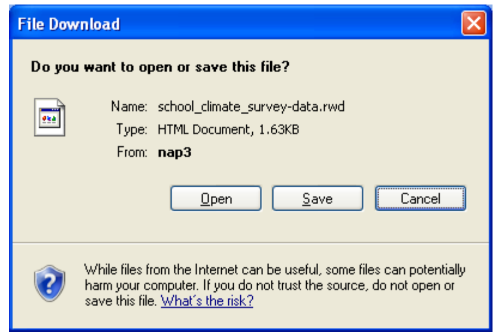
- In Remark Web Survey, select the **Web** tab from the Ribbon and then click **Control Panel**. If a web form is open, the administration script specified in the web form's properties appears in your default web browser. If a web form is not open, the administration script specified in the program options appears in your default web browser.
- Open a web browser and enter the URL for your administration script in the Address bar (e.g., http://www.example.com/cgi-bin/rwsad5.pl).

Please note that there are three types of user accounts and each one has different levels of access to the Control Panel. Administrator accounts can download and view data from the Control Panel, but Standard and Restricted User accounts need explicit permissions set up in order to download data from the Control Panel. See Chapter 2 for detailed information about user accounts.

To download the data through a web browser

1. Access the Remark Web Survey **Control Panel** in a web browser (rwsad5.pl script) with an account that has permission to download data.
2. Enter your username and password and then click the **Login** button.
    - **Note:** The default user is **Administrator**. The person who installed the scripts onto the web server may or may not have set up individual user accounts. You may need to ask this person for your login information.
3. Click the **Data & Stats** tab.
4. Select a web form from the **Form** drop-down list.
5. Click the button for **Download Data**.
6. In the **File Download** window, click the button to **Save** the file. This prompt may vary slightly from web browser to web browser.

7. In the **Save** window, select a location for the file and then click the **Save** button. Do not change the file extension on the file (.rwd). Make note of where you are saving the file so that you can retrieve it later.



The data file is now downloaded. You can open the downloaded file within Remark Web Survey.

8. In the Remark Web Survey designer, open the desired web form.
9. Open the **Data Viewer** window by clicking its button in the status bar or by selecting the **Home** tab from the Ribbon and then clicking **Data Viewer**.
10. Locate the toolbar on the **Data Viewer**.
11. Click the **Open** button. (You may also click the Application Button and choose **Open** to open a data file as long as the Data Viewer is active.)
12. Locate the .rwd file you downloaded from the Remark Web Survey Control Panel and then click the **Open** button. The data are loaded into the data grid.
    - **Note:** If using Database Link fields, these fields are processed when Remark Web Survey opens or downloads a .rwd data file.

Downloading Incomplete Submissions via the Control Panel

Remark Web Survey allows you to download partial data submissions, which occur when someone starts to fill in a web form but never completes it. They may have filled in a page or two and then never completed it, or they may have paused the web form and never returned to finish it. By default, incomplete submissions are not downloaded with the data.

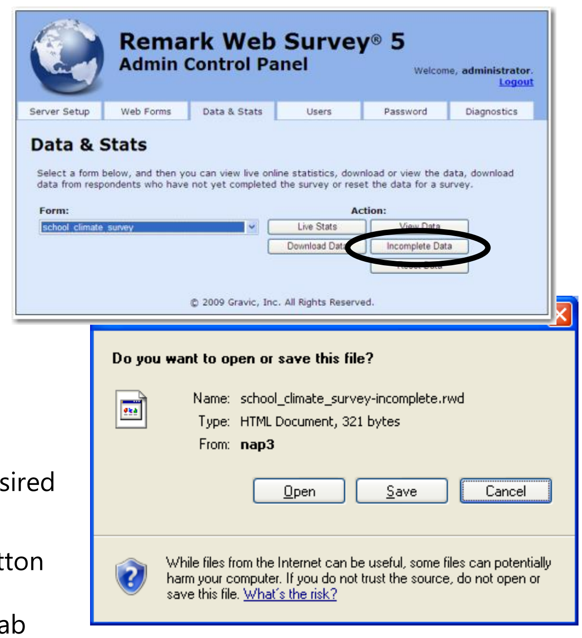
If you plan to include incomplete data submissions, use caution with the Remove respondent's incomplete data from the server setting. This setting removes incomplete submissions after a specified amount of time (days or minutes). The scripts check for incomplete submissions to remove whenever interaction with the data (rws5.pl) script occurs. If you remove incomplete data submissions, you are not able to download incomplete data later. Please see Chapter 4 for a complete description of removing incomplete data submissions.

Please note that there are three types of user accounts and each one has different levels of access to the Control Panel. Administrator accounts can download and view data from the Control Panel, but Standard and Restricted User accounts need explicit permissions set up in order to download data from the Control Panel. See Chapter 2 for detailed information about user accounts.

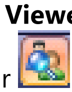
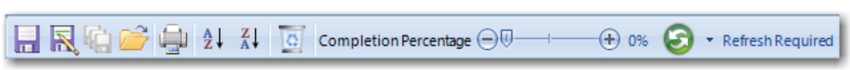
To download incomplete data submissions via the Control Panel

1. Access the Remark Web Survey **Control Panel** in a web browser (rwsad5.pl script) with an account that has permission to download data.

2. Enter your username and password and then click the **Login** button.
    - **Note:** The default user is **Administrator**. The person who installed the scripts onto the web server may or may not have set up individual user accounts. You may need to ask this person for your login information.
3. Click the **Data & Stats** tab.
4. Select a web form from the **Form** drop-down list.
5. Click the button for **Incomplete Data**.
6. In the **File Download** window, click the button to **Save** the file. This prompt may vary slightly from web browser to web browser.
7. In the **Save** window, select a location for the file and then click the **Save** button. Do not change the file extension on the file (.rwd). Make note of where you are saving the file so that you can retrieve it later.



The data file is now downloaded. You can open the downloaded file within Remark Web Survey.

8. In the Remark Web Survey designer, open the desired web form.
9. Open the **Data Viewer** window by clicking its button in the status bar  or by selecting the **Home** tab from the Ribbon and then clicking **Data Viewer**.
10. Locate the toolbar on the **Data Viewer:**
11. 

.
12. Click the **Open** button. (You may also click the Application Button  and choose **Open** to open a data file as long as the Data Viewer is active.)
13. Locate the .rwd file you downloaded from the Remark Web Survey Control Panel and then click the **Open** button. The data are loaded into the data grid.

When viewing incomplete data submissions, you can customize the desired completion percentage required to consider the data valid. Please see Chapter 10 for information about using the Completion Percentage feature.

Viewing Data Online

At any point while a web form is installed and submissions have been submitted, you may also view the data online without downloading it. Viewing the data is accomplished in the Remark Web Survey Control Panel.

Please note that there are three types of user accounts and each one has different levels of access to the Control Panel. All accounts can view data from the Control Panel, but Restricted User accounts only have access to specific web form data. See Chapter 2 for detailed information about user accounts.

To view data from a web browser

1. Access the Remark Web Survey **Control Panel** in a web browser (rwsad5.pl script).
2. Enter your username and password and then click the **Login** button.
    - **Note:** The default user is **Administrator**. The person who installed the scripts onto the web server may or may not have set up individual user accounts. You may need to ask this person for your login information.
3. Click **Data & Stats** tab.
4. Select a web form from the **Form** drop-down list.
5. Click the button for **View Data**. The data appears on-screen. The field names are listed across the top and bottom of the window, and each line in between represents one respondent's submitted data.
    - **Note:** If a question is set to **Treat each answer choice as a separate question**, the data appear as one question in this view. When downloaded, the data are output to separate data cells.

6. [Optional] Click the **View More Details** button to view the data in greater detail, including viewing the submitter's IP address (if applicable), data submitted and time submitted.
7. When finished reviewing the data, click the **Control Panel** button to return to the previous screen.

Resetting Data

You may reset a web form's data at any time using the Remark Web Survey Control Panel. Resetting data may be useful if you publish a web form and then test it internally. Once you have completed your tests, you can reset the data file prior to sending out invitations to your web form.

Please note that there are three types of user accounts and each one has different levels of access to the Control Panel. Only administrator accounts are able to reset data through the Control Panel. See Chapter for detailed information about user accounts.

- **Note:** Data can also be reset when publishing forms to the web server. If a web form already exists on the web server, a prompt appears asking if you wish to remove data, log and temporary session files. If you remove the data via this prompt, a backup copy is created.

To reset data from a web browser

1. Access the Remark Web Survey **Control Panel** in a web browser (rwsad5.pl script) using an account with administrator privileges.
2. Enter your username and password and then click the **Login** button.
   - **Note:** The default user is **Administrator**. The person who installed the scripts onto the web server may or may not have set up individual user accounts. You may need to ask this person for your login information.
3. Click Data & Stats tab.
4. Select a web form from the **Form** drop-down list.
5. Click the button for **Reset Data**. You see a prompt asking if you are sure you want to reset the data. Click **OK** to continue or **Cancel** to return to the Control Panel.
   - **Note:** Resetting data via the Control Panel cannot be undone! Once you reset the data, the data file is removed from the web server.

Log Files

In addition to data files, you can also view or download the associated log files for each web form. The log file tracks information about each form submission, including:

Option	Description
Entry Number	Displays a sequential number assigned to each log file record.
UID	Displays a unique identifier that is assigned to each respondent and is used to track the entry. Each respondent has a session that is tracked by this UID. The UID helps track whether a particular respondent has completed the web form, how much time he/she has to go back and complete the web form, etc.
Action	Describes the action that took place (e.g., the web form was completed, a password was entered, etc.).
Access	Describes whether access to the web form was permitted.
Encrypted Password	Displays the password used to access the web form, if applicable, in an encrypted format.
IP Address	Records the IP address of the person submitting the web form (if this option is enabled in the web form's properties).
Date	Records the date of the web form submission.
Time	Records the time of the web form submission.

Please note that there are three types of user accounts and each one has different levels of access to the Control Panel. Only administrator accounts are able to view or download log files through the Control Panel. See Chapter 2 for detailed information about user accounts.

To view or download log files from a web browser

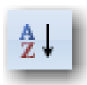
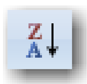
1. Access the Remark Web Survey **Control Panel** in a web browser (rwsad5.pl script) using an account with administrator privileges.
2. Enter your username and password and then click the **Login** button.
    - **Note:** The default user is **Administrator**. The person who installed the scripts onto the web server may or may not have set up individual user accounts. You may need to ask this person for your login information.

3. Click **Web Forms** tab.
4. Select a web form from the **Form** drop-down list.
5. Click the button for **View Log** to view the log file on-screen. Or click the **Download Log** button to save the log file to disk as a text file. This file can be opened in a text editor, such as Notepad. Finally, you can remove the log file by clicking **Reset Log**. This deletes the log file and a new one is created when/if interaction with the web form occurs.

Understanding the Data Viewer Grid

The Remark Web Survey Data Viewer grid employs a spreadsheet style interface to display data. Each grid column corresponds to a question on the web form and every grid row corresponds to one submitted web form. The grid employs two cell types to store data: text and list. The cell type depends on the kind of question being used. Textbox/Text Area style questions use text (data entry) cells. Checkbox, Option Button and Drop-Down Box style questions use list cells. A cell changes between a textbox and list box depending on its question type. The Data Viewer grid is divided into sections based on the pages in the active web form. Each page is separated by a dashed line.

The Data Viewer has its own toolbar for frequently used functions (continue reading this chapter for more detailed descriptions of the features):

Toolbar Button	Option	Description
	Save	Saves the data. If saving for the first time, a save window appears. For subsequent saves, the existing file is overwritten automatically.
	Save As	Saves the data by opening a save window. This window allows you to name the file, choose a location for the file and specify a file type.
	Save All Data	Saves all open data grids to a single file. All grids are closed upon saving and the combined file remains open. Make sure you have saved any individual files (if needed) prior to using Save All Data.
	Open	Opens a data set.
	Print	Prints the active data set.
	Sort Ascending	Sorts the active data set in ascending order based on the column you have selected.
	Sort Descending	Sorts the active data set in descending order based on the column you have selected.
	Close All Data	Closes all open data grids.
	Completion Percentage	Allows you to specify the percent complete desired when downloading incomplete data submissions. You can then choose filtering options based on the data records that are flagged as incomplete.

To access the Data Viewer Grid

1. Open a web form in Remark Web Survey.
2. Open the **Data Viewer** by either clicking the **Data Viewer** button in the status bar,  or by selecting the **Home** tab from the Ribbon and then clicking **Data Viewer**, 

.
    - **Note:** You cannot make changes to a web form when the Data Viewer is open and has data in it.

Editing the Data Viewer Grid

The Data Viewer grid behaves like a spreadsheet. You can cut, copy and paste selections to and from the grid. Additionally, you can change the contents of individual grid cells by clicking in a cell. The grid employs standard practices for data manipulation. All tools are available from the Home tab of the Ribbon or the toolbar on the Data Viewer.

- Cut (Ctrl+X)
- Copy (Ctrl+C)
- Paste (Ctrl+V)
- Delete (data or an entire row)
- Insert
- Sort
- Find/Replace
- Print
- Automatic column widths: Resizes columns to fit the data
- Selection: Select an individual cell by clicking in it, a row(s) by clicking its header (number), a column(s) by clicking its header (field name) or the entire grid by clicking the empty cell in the uppermost left corner of the grid.

The Data Viewer grid allows in-cell editing by clicking within a particular cell. The grid employs two cell types to store data: text and list. The cell type depends on the kind of field being used. Each cell changes between a textbox and list box depending on its question type. Textbox/Text Area style questions are considered text cells. You do not have a drop-down list for these field types. All other types of questions are considered list fields and have a drop-down list from which you can choose correct responses based on the labels entered in the question's properties.

Respondent Detection

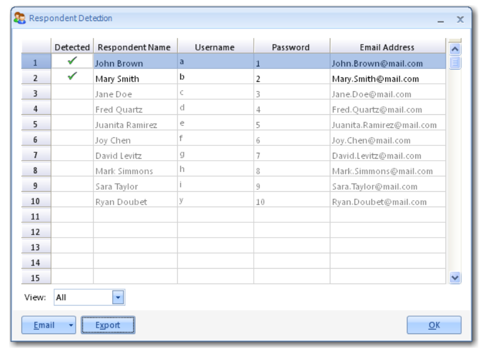
Remark Web Survey has a respondent detection feature that works in conjunction with password protection. When you enter a list of valid passwords for a password protected web form, you can optionally designate a name field, username field and an email field. When you download the data for the web form, Remark Web Survey can search through the passwords that were submitted to see who has and has not filled out your web form. The full list of respondents can also be exported to a file. You can use this file to send email notifications to those who have not yet filled out the web form reminding them to do so (if you are not using Remark Web Survey's built-in email client).

To use respondent detection

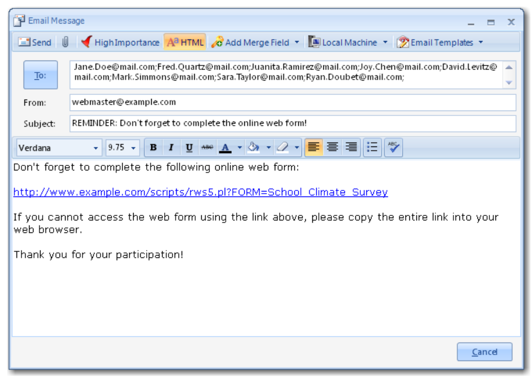
1. Create a web form with a **Login** page (see Chapter 4 for detailed information about setting up Login pages). When setting up the login page, enter information into the Name, Username and/or Email Address columns for optimum use of this feature.
2. Publish the web form and collect responses.
3. Download or open the data file containing the responses.

4. Select the **Tools** tab in the Ribbon and then click **Respondent Detection**, 

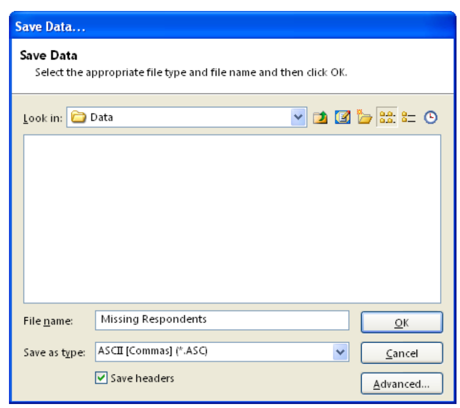
.
    - **Note:** If multiple data grids are open that correspond to the same web form, you receive a prompt to choose the data grids to include in the Respondent Detection process.
5. The **Respondent Detection** window appears. Use the **View** drop-down list at the bottom of the window to select which respondents to view: **All**, **Detected** or **Missing**.
6. The **Detected** column contains a green checkmark if a respondent has submitted the web form. The respondent's name, username, password and email address (if these fields are being used in the **Password list builder**) are also listed.



7. The **Detected** column is blank if a respondent has not submitted the web form. The respondent's name, username, password and email address (if these fields are being used in the **Password list builder**) are listed using a lighter (disabled) text color. You may optionally use Remark Web Survey's email function to send emails to respondents (see step 8) or export a file of respondents (see step 9).
8. [OPTIONAL] Click the **Email** button to launch Remark Web Survey's built-in email client and send an email message to the respondents listed in the grid. You should decide who you want to send the email to before launching the email client. Choose **Detected**, **Missing** or **All** in the Respondent Detection window. See next section for detailed information about using the email client.



9. [OPTIONAL] Alternatively, click the **Export** button to export the respondent list to the desired format. Continue with steps 10-13.



10. [OPTIONAL] Select a location in which to save the file in the **Look in** box.
11. [OPTIONAL] Enter a file name for the report in the **File name** box.
12. [OPTIONAL] Select a file format from the **Save as type** box format (available formats include those supported by Remark Web Survey when saving data.
13. [OPTIONAL] Click the **OK** button to save the file.

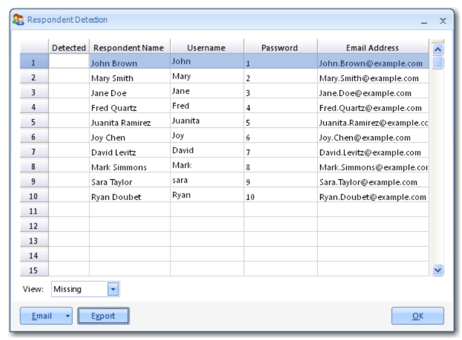
Sending Reminder Emails

The built-in email client can be used in conjunction with Respondent Detection to send reminder emails to those who have not submitted your web form. When you send reminders, an email is automatically generated that contains the link to your web form. You then add the recipients to the message. You may modify the subject line and body of the email; however do not modify the link to your web form. If you change this link, respondents are unable to access your web form.

- **Note:** You must have a functioning SMTP server set up outside of Remark Web Survey to send reminder emails. The server information must be set up either in the Remark Web Survey program options or the web form's properties in order to utilize the server. See Chapter 2 for further information.

The following set of instructions assumes that you understand the purpose of the Respondent Detection feature.

To send email reminders



1. Select the **Tools** tab in the Ribbon and then click **Respondent Detection**, 

.
2. The **Respondent Detection** window appears. Use the **View** drop-down list at the bottom of the window to select the **Missing** list of respondents.
3. There are two email options available: Click the **Email** button to launch the **Email Message** window or click the down arrow on the **Email** button and choose **Include Username/Passwords** to embed the respondents' username and password into the web form link that is sent in the reminder email. Embedding the username and password into the web form URL means respondents are automatically logged in when they click the URL (the password is encrypted in the URL).
    - **Note:** If you are using Query Parameters and want to send email reminders from Remark Web Survey, use the **Advanced** option on the **Email** button. Please see Chapter 5 for detailed information about using the Advanced options. Then return to this section for generic information about the email window.

The **Email Message** window appears.

4. If you are using a password protected web form **and** have entered email addresses in the password list builder screen, the **To** section of the email is automatically filled with your missing respondents from the **Password list builder** window. However, you may also click the **To** button to see a list of respondents who have either submitted the web form (**Detected Respondents**) or not submitted your web form yet (**Missing Respondents**). You may use these lists to alter your **To** list. Use the **Missing Respondents** list to send reminder emails to those who have not submitted the web form.
5. [Optional] If desired, you may input more email addresses by either typing them in manually (separated by a semi-colon (;)) or by importing the passwords from an external database.

6. The **From** address is filled with the web form administrator address that was entered in the web form's properties. Accept the default or enter a new email address.
7. Accept or modify the **Subject** line of the email.
8. The **Display name** defaults to the first half of the From address. You may put any name you like. This name appears as the Sender with the corresponding email address (e.g., Webmaster (webmaster@example.com).
9. At this point you can either manually alter the body of the email or apply an email template. If you wish to apply an email template, click the **Email Templates** button and choose the desired template. Email templates are covered in detail in Chapter 9.
10. [Optional] Use the options on the toolbar to customize your message, if desired. You may add an attachment , send the email with **High Importance** or format the email in **HTML** .
11. [Optional] If desired, click the **Local Machine** button to choose which email server to use to send the emails (this is not common). The Local Machine settings can be added at both a program level and a web form level. If the two server settings differ, you can use this button to choose which server you wish to use. If the two do not differ, the server information entered is be used by default.
12. [Optional] Add merge fields to the email by clicking the **Merge Fields** button. Merge fields allow you to personalize the email by adding in keywords that are merged when the email is sent. For password-protected forms, you can add **Username**, **Password** and/or **Name** merge fields. Select an insertion point in the body of the email, click **Merge Fields** and then choose the desired field. To use username merge fields, you must have marked the checkbox to include a username on the Login page properties screen. To include a name, you must have defined names in the **Password builder list**. Note that when merging passwords into the body of the email, the password is not encrypted so that the respondents can see their passwords.
13. When you have the email formatted as desired, click the **Send** button to send the emails. They are sent according to the throttle rate defined in the web form properties. Respondents receive the email in the format that is set up in their email client. They can either click or copy the link to your web form that is included in the body of your email message. If you chose to embed the password into the URL, encrypted passwords are embedded as emails are generated and sent (behind the scenes).
    - **Tip:** Respondents with a text only email client may not see actual hyperlinks in their email messages. When sending a hyperlink through email, it is recommended that you include instructions that explain to respondents that they can copy the link and paste it into a web browser if the hyperlink does not automatically take them to the web form.

Saving Grid Data

Once data are downloaded, you can save the data in the grid to dozens of different file formats.

- **Note:** When working with data in Remark Web Survey, we recommend that you use the Remark file format (RMK). Save data to other formats when exporting for analysis.

When saving data, you have the option of using Save Data or Save Data As. The Save Data option can be used to save a data set for the first time or to overwrite the current data set. The Save Data As option allows you to save the current data set with new parameters (e.g., new file name, different directory, different file type, etc.). The Data Viewer grid has its own toolbar that contains options for both Save and Save As.

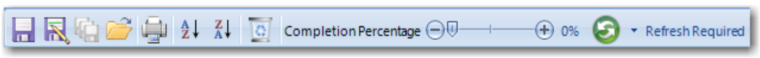
The following table lists the different save file formats, their extensions and a brief description:

File Format	Extension	Description
Remark	RMK	Remark proprietary format
SQL Server 2000-2005	MDF	Microsoft SQL Server format
Oracle 7.4 and later	*.*	Oracle format
Access 2007-2013	ACCDB	Microsoft Access 2007 - 2013 format (only available if the Access 2007, 2010 or 2013 database engine is installed)
Access	MDB	Microsoft Access 2000-2003 format
Access 95-97	MDB	Microsoft Access 95-97 format
Access 2.0	MDB	Microsoft Access 2.0 format
Access 1.0	MDB	Microsoft Access 1.0 format
Excel 2013	XLSX	Microsoft Excel 2013 format
Excel 2010	XLSX	Microsoft Excel 2010 format
Excel 2007	XLSX	Microsoft Excel 2007 format
Excel 97-2003	XLS	Microsoft Excel 97-2003 format
Excel 95	XLS	Microsoft Excel 95 format
Excel 4.0	XLS	Microsoft Excel 4.0 format
Excel 3.0	XLS	Microsoft Excel 3.0 format
Questionmark	QSF	Perception Questionmark format (save only)
SPSS	SAV	SPSS format
SPSS (Legacy)	SAV	SPSS legacy format

File Format	Extension	Description
Survey Pro	SRV	Survey Pro standard format (Apian Software)
Survey Pro STL	STL	Survey Pro STL format (Apian Software)
CSV	CSV	Comma separated values
ASCII [tabs]	ASC	Tab delimited ASCII
Spreadsheet [commas]	TXT	Comma delimited ASCII with quotes around non-numeric data
Spreadsheet [tabs]	TXT	Tab delimited ASCII with quotes around non-numeric data
Survey System	DAT	The Survey System format (Creative Research Systems)
dBase 5.0	DBF	dBase 5.0 format
dBase IV	DBF	dBase IV format
dBase III	DBF	dBase III format
Paradox 5.X	DB	Paradox 5.X format; existing files may only be overwritten (there are no append options)
Paradox 4.X	DB	Paradox 4.X format; existing files may only be overwritten (there are no append options)
Paradox 3.X	DB	Paradox 3.X format; existing files may only be overwritten (there are no append options)
Lotus WK3	WK3	Lotus Works 3 format; existing files may only be overwritten (there are no append options)
Lotus WK1	WK1	Lotus Works 1 format
Lotus WJ3	WJ3	Lotus WJ3 format (Japanese)
Lotus WJ2	WJ2	Lotus WJ2 format (Japanese)
Lotus 1-2-3	WKS	Lotus 1-2-3 format
LXR Test	MRG	LXR Test format
Report	RPT	Fixed format ASCII, cell text padded or truncated to specified record length
Data Interchange Format	DIF	Standard format using file header and data section
XML	XML	Extensible Markup Language format
HTML	HTM	Hypertext Markup Language
ODBC	*.*	Open Database Connectivity
Custom	ASC, TXT	Custom Text format

File Format	Extension	Description
Database Update	XLS, XLSX, MDB, ACCDB	Updates an existing database with new data (e.g., adds missing information, overwrites existing information).
ODBC Database Update	*.*	Updates an existing ODBC database with new data (e.g., adds missing information, overwrites existing information).

To save grid data

1. Locate the toolbar on the **Data Viewer**: 

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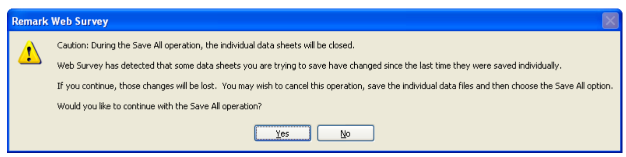
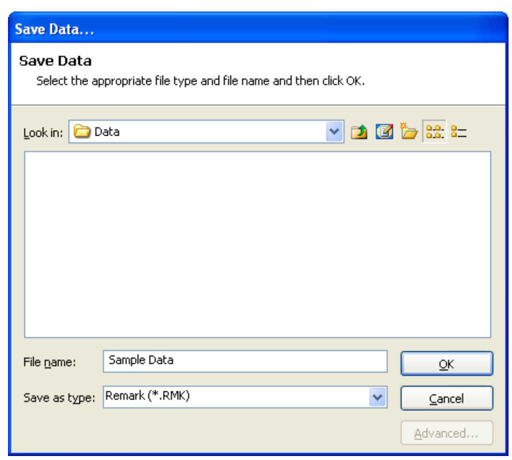
2. There are three options when saving data:
   - Click the **Save Data**  button if saving the data set for the first time or to overwrite the data.
   - Click the **Save Data As**  button to save the data with new parameters.
   - Click the **Save All Data**  button to save all open data grids corresponding to the active web form to a single data file. This feature is useful if you have saved data files individually and now want to combine them into one overall (complete) data file.
   - **Note:** When using the Save All Data files, the individual data grids are closed and only the combined data file is visible in the Data Viewer. If you made changes to your individual data files and want them to be saved, save the individual files first. Then use the Save All Data option. (Note: A warning regarding this information appears when you click Save All Data.)



If saving for the first time or using **Save Data As** or **Save All Data**, the **Save Data** window opens, allowing you to choose a file name, a file type, the directory in which you would like the file saved and **Advanced** saving options, if applicable.



3. Select the desired directory location using the **Look in** drop down box.
4. Enter a name in the box titled **File name**.
5. Select the desired output format in the box titled **Save as type**.
6. If saving to a database type that supports internal table names, enter a table name in the box titled **Table name**.
   - **Note:** Each database format has different table name limitations. Refer to your database documentation for information on table name limitations.

7. When exporting, you can save the column headers for certain formats by selecting the **Save headers** checkbox. The **Save headers** checkbox only displays when appropriate. The SPSS file format also allows you to save decimal places. Enter a value in the **Decimal places** box (you may save up to 4 decimal places).

Advanced Saving Options

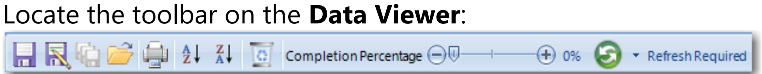
When saving data to database formats, you have the option of setting advanced parameters. The advanced window shows you each question and pertinent information about its field type. You can then choose options about the question that you want included in your database. This feature can be useful if you are saving to a database format that has specific requirements. You can temporarily override the .rwsx form settings by using the advanced parameters.

- **Note:** Setting parameters in the advanced saving window does not make any changes to the web survey file (.rwsx).

The following advanced features are available (depending upon the selected format):

Option	Description
Include	Mark the **Include** checkbox to include the question in the database.
Name	Use the **Name** column to enter a new field name to be used in the exported database, if desired. Changing the field name in this window does not affect the field name in the web form file.
Data Type	Use the **Data Type** column to change the data type for this question.
Size	Use the **Size** column to specify a field size for the data for this question. Do not specify a size that is smaller than what is in your data.

To use advanced saving options

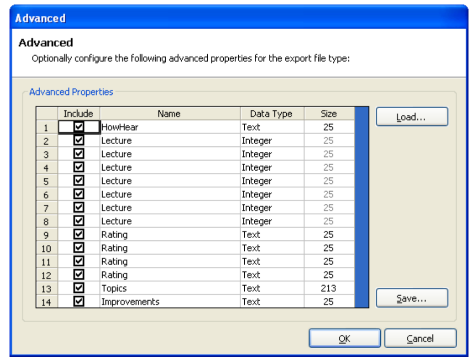
1. Locate the toolbar on the **Data Viewer**:


.
2. Click the **Save Data**  button if saving the data set for the first time, click the **Save Data As**  button to save the data with new parameters or click the **Save All Data**  button to save all open data grids corresponding to the active web form to one file.

If saving for the first time, using **Save Data As** or using **Save All Data**, the **Save Data** window opens, allowing you to choose a file name, a file type, the directory in which you would like the file saved and **Advanced** saving options.

3. Select the desired directory location using the **Look in** drop down box.
4. Enter a name in the box titled **File name**.
5. Select the desired database format in the box titled **Save as type**.

6. If saving to a database type that supports internal table names, enter a table name in the box titled **Table name**.
    - **Note:** Each database format has different table name limitations. Refer to your database documentation for information on table name limitations.
7. Click the **Advanced** button.

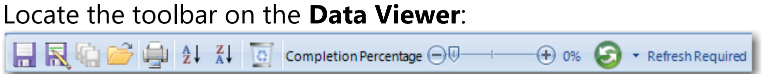


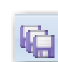
8. [OPTIONAL] If you have previously saved a definition file for this data set, click the **Load** button to locate the appropriate INI file containing your settings. Otherwise, continue to Step 9 to build a new data file.
9. Make any desired changes in the **Include**, **Name**, **Data Type** or **Size** columns, as described previously.
10. [OPTIONAL] If desired, click the **Save** button to save the settings to a configuration file (.ini file). You can then open this configuration file for future save operations with this same web form. This feature can save time when saving future data sets.
11. Click the **OK** button to save the changes.
12. In the **Save Data** window, click the **OK** button to save the data.

Custom Format

The Custom format allows you to create a customized text file. This format is useful for exporting data into a database or other program that has very specific requirements. The format can also be used to break apart rows of data into multiple records. For example, if you are processing an attendance sheet containing records for multiple students in a single row, you can use the Custom format to separate the data into one record for each student.

To use the Custom format

1. Locate the toolbar on the **Data Viewer**:


.
2. Click the **Save Data**  button if saving the data set for the first time, click the **Save Data As**  button to save the data with new parameters or click the **Save All Data**  button to save all open data grids corresponding to the active web form to one file.
3. Select the desired folder location using the **Look in** drop down box.
4. Enter a name in the box titled **File name**.
5. Select the **Custom (*.ASC, *.TXT)** format in the box titled **Save as type**.
6. Click the **OK** button.

7. If you have used the Custom format previously and have a saved configuration file that applies to this data set, click the ellipsis (...) button to locate the configuration file. Otherwise, continue to the next step
8. Select the options you wish to use to customize your data set. Each option is described here:

Option	**Description**
Start export at row	Enter the row number that you want to use as the first record in the exported data file. All rows from this point forward are included in the data file. Enter 0 to include region (field) names as the first record.
File Type	Delimited: Fields are separated by a delimiter, such as a comma or tab. Fixed-Width: Fields are aligned at fixed character spaces.
Record Delimiter	Sets the delimiter to be used to separate records: Carriage Return/Line Feed, Carriage Return, Line Feed or any other string.
Column Delimiter	Select the character to use to separate the columns in the data file: Comma, Tab, Semi-colon, Space or any other string.
Text Qualifier	Select the character to use to qualify text. Textual responses are encapsulated within these characters. Options include: None, double quote ("), single quote (').
Multiple Response Qualifier	Select the character to use qualify multiple responses. Reponses are encapsulated within these characters. Options include: Parenthesis (( )), Curly Braces ({ }), Square Braces ([ ]), Angle Brackets (< >) or any other single character.
Multiple Response Delimiter	Select the character to use to separate multiple responses. Options include Comma (,), Hyphen (“), Colon (:), Semi-colon (;), Space or any other single character.
Fixed Width Files Only:	
Automatically format questions that allow multiple responses	Mark the Automatically format questions that allow multiple responses checkbox to automatically set formatting for questions that allow more than one answer choice (e.g., (1,2,3) becomes 123). Note that Remark looks at the longest answer choice and any answer choices that are shorter have padding added to them to make them the same length. For example, if the answers are 5, 10 and 3, it would look like 5 103. One space of padding is added after the 5 because 10 is the longest answer choice with two characters. This setting only applies to Fixed Width files.
Field Size	The maximum number of characters allowed in the field.
Start Position	The position, in characters, where the field begins. For example, if your field sizes are 25, the first field starts at position 1 and the second field starts at position 26 (25 characters later). This field is for reference only and cannot be changed.
Pad Character	Enter the character to use to pad the field (typically a space character).

Option	Description
Pad On	Select whether to pad the field on the left or right of the text that resides in the field.

8. Click the **Next** button to go to the next step.
9. Use this step if you need to break your data apart into multiple records. This option is useful for things like attendance forms, session evaluations and any other forms that evaluate more than one person on a single form. If you do not need to break apart data, simply click the **Finish** button (step 14).
10. Choose how many records you want in your data set. For example, if you are processing an attendance sheet and there are 20 students per form (row of data), you would enter 20. Click the **Update** button. The number of desired records are created on the right side of the window.
11. You have three options for formatting the file:

- **Add to Every Record:** Choose this option to add a question (or questions) to every record in the data set. In our attendance example, this might be a class name or teacher name (something that is static for everyone).
- **Add to Selected Records:** Use this option to add questions to only the records you have selected on the right side of the window. This option lets you fine tune what goes into each record.
- **Split Among Records:** Use this option to select questions and then have them equally split across all records. In our attendance example, this would be the questions that are used to track attendance (e.g., days of the week). For example, suppose you have students listed down the left side of the form and options for Monday-Friday for each student. If a student is in attendance, the corresponding bubble is filled. If the student is absent, the bubble is left blank (this is a Boolean

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
Student1	Student2	Student3	Student4	Student5	M1	M2	M3	M4	M5	T1	T2	T3	T4	T5	W1	W2	W3	W4	W5
12345	57748	43637	56832	34577	0	0	1	1	1	0	0	1	0	0	1	1	1	1	1

region). You can split the students among all the records. Then split each day among all the records. See screen shot at right. If your data was not split, you might have something like this:

Notice how the students and attendance are listed in one long row.

However, if you split your data, you have this:

A	B	C	D	E	F
12345	0	0	1	1	1
57748	0	0	1	0	1
43637	1	1	1	0	1
56832	1	0	1	1	1
34577	1	0	1	1	1

Notice how each student is now occupying one record of data, along with his/her attendance.

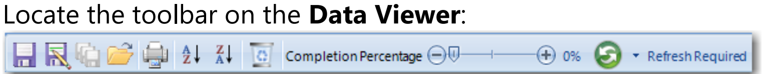
12. Using the above descriptions, parse your data as needed.
13. Use the **Preview** button to preview how your data will look once exported.
14. When finished, click the **Finish** button.
15. When the **Save Configuration** window appears, click the **Yes** button to save your settings to a file that you can use later when saving data. If you do not wish to save this configuration file, click the **No** button. If you are not saving the *configuration* file for later use, the *data* file is saved when you click the No button. Continue with the next steps if you are saving the configuration file. Otherwise you are finished saving your data.
    - [Optional] If saving the configuration file, in the **Save Text Export Configuration As** box, select a location in which to save the configuration file in the **Save in** box.
    - Enter a name for the file in the **File name** box.
    - Leave the **Save as type** box set to **Text Export Configuration Files (*.tec)**.
    - Click the **Save** button to save the TEC file and create the data file.

The data is saved according to your specifications and you can reuse the TEC file in the future. The resulting text file can be taken to the application of your choice.

Database Update Format

The database update format allows you to update an existing database based on the data in the Remark Web Survey data grid (Access or Excel). The data are matched to the existing database by the field names and a mapping process. When saving to this format, you map the fields in the Remark Web Survey data to the fields in the existing database. You also choose a question to be the record identifier. If data exists in the database it is updated with what is in Remark Web Survey. For example, if you were conducting a course evaluation and asked for the students' ID number in the web survey, you could use the student ID as the record ID to update an external database using the Database Update format. During the save process, Remark Web Survey attempts to find the Student ID in the database and then updates the data fields associated with that student. If the student ID is not found, you have the option of adding the record to the external database.

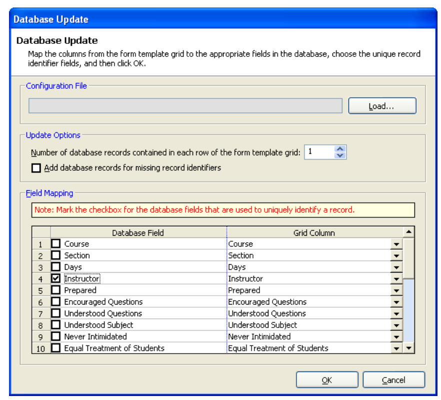
To use the Database Update format

1. Locate the toolbar on the **Data Viewer**:


.
2. Click the **Save Data**  button if saving the data set for the first time, click the **Save Data As**  button to save the data with new parameters or the **Save All Data**  button to save all open data grids corresponding to the active template to a single data file.

If saving for the first time or using **Save Data As**, the **Save Data** window opens, allowing you to choose a file name, a file type, the directory in which you would like the file saved and **Advanced** saving options if applicable.

3. Select the desired directory location using the **Look in** drop down box.
4. Select a file to update, which fills the **File name** box.
5. Select the Database Update (*.ACCDB, *.MDB, *. XLSX, *.XLS) format in the box titled Save as type.
6. Click the **OK** button. A wizard opens to walk you through the next few steps.
7. If you have used the Database Update format previously and have a saved configuration file that applies to this data set, click the **Load...** button to locate the configuration file. Otherwise, go on to step 8.
    - **Note:** You are prompted to save a configuration file with your settings after saving the data.
8. In the **Update Options** area, select the number of records contained in each row of the data set (e.g., if multiple respondents' answers are on a single form, you would have more than one record per data row). If each record in the data set corresponds to one respondent's submission, use 1 for the value.
9. In the **Update Options** area, mark the **Add database records for missing record identifiers** checkbox if you would like to create new records in the database when an identifier is not found.



10. In the **Field Mapping** area, map the fields from Remark Web Survey to the fields in the external database. The database fields are listed in the first column and the Remark Web Survey fields (questions) are listed in the second column, called **Grid Column**. Use the down arrow in the **Grid Column** section to choose the appropriate field to map to the corresponding database field.
11. Choose a field or fields to use as an identifier by marking the appropriate checkbox next to the field name. The identifier fields are used to match data from Remark Web Survey to the external database. If a match is not found, the data is not added to the database and you receive a message. You may select more than one field to use as the identifier, in which case the data from all identifier fields must be a match for the record to be updated in the external database.
12. Click the **OK** button to save the data.
    - **Note:** The ODBC Database Update format works just as described above, but you can save to a database using an ODBC connection.

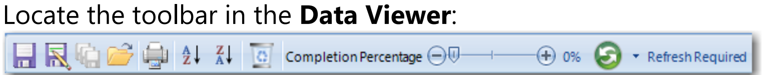
Opening Data

Remark Web Survey can open data saved in dozens of different file formats. The following table lists the different file formats Remark Web Survey can open, their extensions and a brief description:

File Format	Extension	Description
Remark	RMK	Remark proprietary format
Web Survey	RWD	Remark Web Survey proprietary format (the data that resides on the web server)
SQL Server 2000-2005	MDF	Microsoft SQL Server format
Oracle 7.4 & later	*.*	Oracle format
Access 2007-2013	ACCDB	Microsoft Access 2007-2013 format (only available if the Access 2007 or greater database engine is installed)
Access	MDB	Microsoft Access 2000-2003 format
Access 95-97	MDB	Microsoft Access 95-97 format
Access 2.0	MDB	Microsoft Access 2.0 format
Access 1.0	MDB	Microsoft Access 1.0 format
Excel 2013	XLSX	Microsoft Excel 2013 format
Excel 2010	XLSX	Microsoft Excel 2010 format
Excel 2007	XLSX	Microsoft Excel 2007 format
Excel 97-2003	XLS	Microsoft Excel 97-2003 format
Excel 95	XLS	Microsoft Excel 95 format
Excel 4.0	XLS	Microsoft Excel 4.0 format
Excel 3.0	XLS	Microsoft Excel 3.0 format
SPSS	SAV	SPSS format
SPSS legacy	SAV	SPSS legacy format
Survey Pro	SRV	Survey Pro standard format (Apian Software)
CSV	CSV	Comma separated values
ASCII [tabs]	ASC	Tab delimited ASCII
Spreadsheet [commas]	TXT	Comma delimited ASCII with quotes around non-numeric data
Spreadsheet [tabs]	TXT	Tab delimited ASCII with quotes around non-numeric data

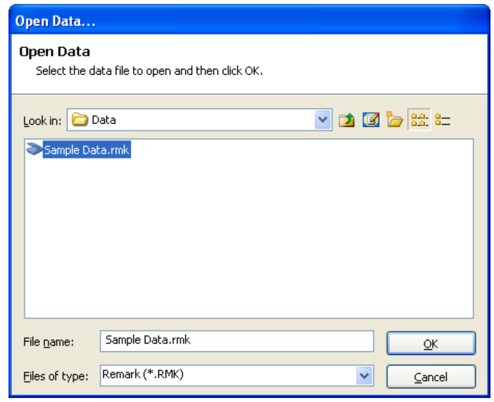
File Format	Extension	Description
dBase 5.0	DBF	dBase 5.0 format
dBase IV	DBF	dBase IV format
dBase III	DBF	dBase III format
Paradox 5.X	DB	Paradox 5.X format
Paradox 4.X	DB	Paradox 4.X format
Paradox 3.X	DB	Paradox 3.X format
Lotus WK4	WK4	Lotus Works 4 format (open only)
Lotus WK3	WK3	Lotus Works 3 format
Lotus WK1	WK1	Lotus Works 1 format
Lotus WJ3	WJ3	Lotus WJ3 format (Japanese)
Lotus WJ2	WJ2	Lotus WJ2 format (Japanese)
Lotus 1-2-3	WKS	Lotus 1-2-3 format
LXR Test	MRG	LXR Test format
Report	RPT	Fixed format ASCII, cell text padded or truncated to specified record length
Data Interchange Format	DIF	Standard format using file header and data section
XML	XML	Extensible Markup Language format
HTML	HTM	Hypertext Markup Language
ODBC	*.*	Open Database Connectivity
Cuom	ASC, TXT	Custom Text format

To open grid data

1. Open a Remark Web Survey web form.
2. Open the **Data Viewer** by either clicking the **Data Viewer** button in the status bar  or by selecting the **Home** tab in the Ribbon and then clicking **Data Viewer**.
3. Locate the toolbar in the **Data Viewer**:


.
4. Click the **Open Data** button  .
    - **Note:** When the Data Viewer is displayed, clicking the **Application button** and then selecting **Open** displays the **Open Data** window.

5. Select the folder containing the data file from the **Look in** drop-down list.
6. Select a file from the list.
7. If opening a database type that supports internal table names, click a table name in the box titled **Table name**.
    - **Caution:** When opening a database file type, Remark Web Survey attempts to match grid column headers to the database's field names. If any column headers can't be matched, an error occurs. Grid column headers do not need to appear in the same order as the database fields.



8. Click the **OK** button to open the data file.
    - **Note:** The data contained in the file must correspond to the current web form or an error may occur.

Chapter 11: Data Analysis

Overview

There are two types of data analysis tools within Remark Web Survey: Remark Quick Stats® and Remark Live Stats™. Remark Quick Stats is used when downloading data in Remark Web Survey and Remark Live Stats is used to view results on the web.

Remark Quick Stats

Remark Quick Stats is an analysis package that ships with the Remark Web Survey software. Remark Quick Stats allows you to tabulate surveys and grade tests right in the software. An overview of Remark Quick Stats is provided here; a complete user's guide is installed in PDF format with the software and can be found by clicking **Start|Programs|Remark Web Survey 5|Documentation|Remark Quick Stats User's Guide.**

Depending on the report selected, Remark Quick Stats can include the following statistics:

Survey Statistics include:

- For each item Remark Quick Stats calculates: Mean, Variance, Standard Deviation, Standard Error, Min, Max, Range, Median, Skewness, Kurtosis, T-Value, Percentiles, Confidence Intervals
- For each answer choice Remark Quick Stats calculates: Frequencies, Percentages, Valid Percent
- A Response Report displays the responses for any particular question on one, easy to read, report (primarily used for open ended questions)
- Crosstabs
- A Group Report displaying means for question groupings

Test Statistics include:

- Advanced Grade steps you through the process of setting up an answer key, grade scale, questions points, learning objectives, benchmark scores and other grading information for your test
- For each item Remark Quick Stats calculates: Mean, Variance, Standard Deviation, Standard Error, Min, Max, Range, Median, Skewness, Kurtosis, T-Value, Percentiles, Confidence Intervals, P-values, Point Biserial Correlation
- For each answer choice Remark Quick Stats calculates: Frequencies, Percentages, Point Biserial
- For each student Remark Quick Stats calculates: Total score, Raw score, Grade, Dev. IQ, Number correct, incorrect, unanswered
- For the test Remark Quick Stats calculates: Number of graded tests and items, Max, Min, Median, Range, Percentile scores, Mean, Variance, Standard Deviation, Confidence Intervals (1,5,95,99%), KR 20, KR21, Coefficient (Cronbach) Alpha
- A Grade Report displays each student's results on the test
- A Group Report displays grades for specific subsets of your data

A variety of graph types are also included (all of which can be copied and printed):

- Pie
- Bar
- Horizontal Bar
- Line
- Area
- Point
- Polar
- Fast Line

Tabulating Surveys with Remark Quick Stats

Surveys can be tabulated in two ways: Quick Survey and Advanced Survey. Quick Survey uses the parameters specified in the form's question and answer properties, such as which questions to tabulate, and then launches Remark Quick Stats. Advanced Survey allows you to customize the tabulation process by choosing which questions to include, assigning numeric values to answer items, assigning benchmarks, adding question text, specifying question groups and more.

To access survey tabulation features

1. Open a web form and then download data or open an existing data file.
2. Select the **Tools** tab in the Ribbon, and then click **Quick Survey** or **Advanced Survey.**

Remark Quick Stats opens allowing you to configure and display reports. Please consult the Remark Quick Stats user's guide PDF for further details about using Remark Quick Stats.

- **Tip:** The survey screens and functions are described in complete detail in the Remark Quick Stats User's Guide PDF file. Access the file by clicking **Start|Programs|Remark Web Survey 5|Documentation**.

Grading Tests with Remark Quick Stats

Tests can be graded in two ways: Quick Grade and Advanced Grade. Quick Grade uses the parameters specified in the web form, such as which questions to grade and their point values. In addition, Quick Grade uses the first row of data in the Data Viewer grid as the answer key; therefore, you should insert your answer key before your test data if you plan to use Quick Grade. Advanced Grade allows you to customize the grading process by choosing which questions to include, assigning point values, setting benchmarks, adding question text, specifying learning objectives and more.

To access test grading features

1. Open a web form and then download data or open an existing data file.
2. Select the **Tools** tab from the Ribbon, and then click **Quick Grade** or **Advanced Grade**.

Remark Quick Stats opens allowing you to configure and display reports. Please consult the Remark Quick Stats user's guide PDF for further details about using Remark Quick Stats.

- **Tip:** The grading screens and functions are described in complete detail in the Remark Quick Stats User's Guide PDF file. Access the file by clicking **Start|Programs|Remark Web Survey 5|Documentation**.

Using Remark Live Stats

The Remark Live Stats® feature is accessed via the Remark Web Survey Control Panel (rwsad5.pl script). It provides an item analysis, response report and duration report using any data collected for a particular web form. It is a great way to get a quick feel for the data for a live form without having to download the entire data set. User accounts can be set up to only access the Remark Live Stats information.

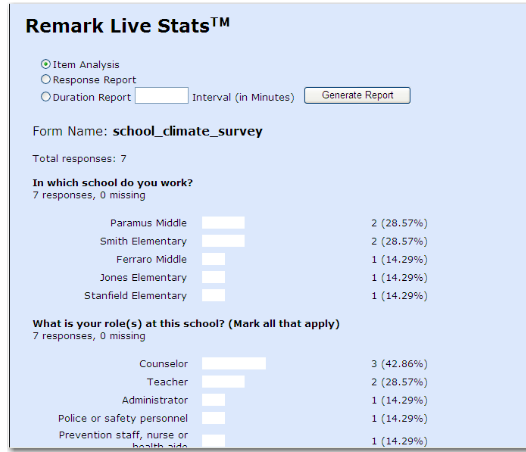
To use Remark Live Stats

1. Access the Remark Web Survey Control Panel in a web browser (rwsad5.pl script).
2. Enter your username and password and then click the **Login** button.
    - **Note:** The default user is **Administrator**. The person who installed the scripts onto the web server may or may not have set up individual user accounts. You may need to ask this person for your login information.

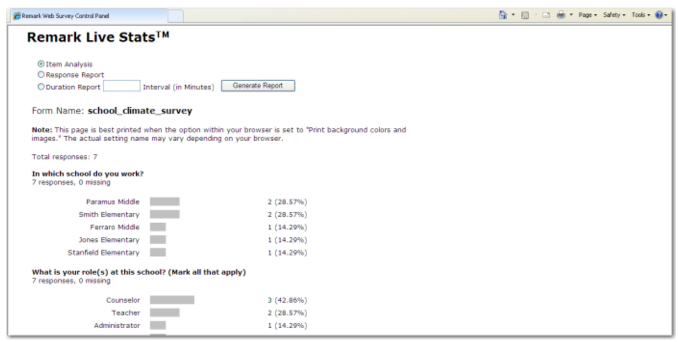
3. Click the **Data & Stats** tab.
4. Select a web form from the **Form** drop-down list.
5. Click the button for **Live Stats**. The **Item Analysis** report appears by default. However, you may choose a **Response Report** or a **Duration Report**:

- *Item Analysis Report:* The Item Analysis report displays each option button, checkbox or drop-down box question on the web form and then calculates the number of detected and missing responses, along with the responses chosen and their corresponding percents. A bar chart of the frequency also displays. If a response has not yet been chosen, it does not display on the report.
- *Response Report:* The Response Report displays information from all textbox/text area questions on the web forms. These are typically open-ended questions.

- *Duration Report:* The **Duration Report** shows the number of responses that fall into a specific time (duration) interval (e.g., how many responses took 0-30 minutes to complete the web form). Select an interval, in minutes, in the **Interval** box. The total number of detected responses displays along with the average time per response for the form. A breakdown of each interval based upon the interval length defined and the number of those responses that fell into that interval is displayed, along with a bar chart of the frequency (based on the number that fell into the selected interval compared to the number of responses).



6. To run a report, choose the option button of the desired report and then click the **Generate Report** button.
7. If desired, print the report by clicking the **Print Version** button at the bottom of the window. A printer friendly report appears. Use the browser's **Print** button to print the report. After printing, click the **OK** button to return to the **Remark Live Stats** page.



   - **Note:** This page is best printed when the option within your web browser is set to "Print background colors and images." The setting name may vary depending on your web browser.
8. When finished viewing the report, click the **Control Panel** button to return to the previous screen.

Configuring Remark Live Stats Only Accounts

Remark Web Survey 5 allows you to set up three different Server component account types:

- Administrator: This account has full control over the Server component (can change settings, publish forms, download data, view logs, view statistics, edit users, etc.). The default account is the Administrator account and there can only be one account named Administrator. You may, however, create different user accounts with administrator privileges.
- Standard User: This account only allows the user to view Remark Live Stats and web form data when they login to the Remark Web Survey Control Panel (rwsad5.pl script). In addition you can choose whether to allow automatic form publishing and data downloading from the Designer component for this account. If automatic form publishing and data downloading are enabled, they can use these features for any web form within the Designer component. In addition, if automatic data downloading is enabled, the user is able to download data from the Control Panel.

- Restricted User: This account only allows the user to view Remark Live Stats information and web form data for specific forms when they login to the Remark Web Survey Control Panel (rwsad5.pl script). In addition you can choose whether to allow automatic form publishing and data downloading from the Designer component for the specified forms for this account. If automatic form publishing is enabled, the user can publish any web form from the Designer component. If automatic data downloading is enabled, the user can only download data from the Designer component for the forms specified in their user account. The user can also download data from the Control Panel for the specified forms. Note that after a new web form is published, an administrator needs to add that web form to the list of available web forms for the restricted user.

Standard and Restricted User accounts only have access to data and Remark Live Stats; they do not see the other options available in the Remark Web Survey Control Panel.

To set up a Remark Live Stats user

1. Log in to the Remark Web Survey Control Panel (rwsad5.pl) using an account with administrator privileges through a web browser.
2. Select the **Users** tab.
3. Click the **Add User** button.
4. Enter the desired **Username** and **Password** for the new user. Determine the level of permissions you want to grant to the user (see description above): **Standard User** or **Restricted User**.

5. If setting up a **Standard** or **Restricted User**, choose the web forms to which the user has access.
6. Once you choose a permission level, determine whether you want the user to be able to automatically publish web forms and download data from the Designer component. Mark the **Enable automatic publishing from the Designer component** and/or **Enable automatic data downloading from the Designer component** checkboxes to grant these permissions. If users do not have these permissions, they have to rely on another user to publish web forms and download data.
    - **Note:** Restricted Users can publish any web form, but can only download data for those forms that are specified.
7. Click the **OK** button to add the new user.

When the new user logs in, s/he has access to the Remark Live Stats area and data for all forms if the user is a Standard user or for only the specific forms allowed if the user is a Restricted user.

Chapter 12: Remark Web Survey Program Options

You can customize Remark Web Survey so that the software runs in the most efficient manner appropriate to your tasks. Use the Program Options to customize default program settings. By choosing the default settings that you most commonly use, you can save a considerable amount of time when creating new web forms. Remember that the changes you make in the program options affect every new web form that you create from that moment forward. Changes made in the program options do not affect previously created web forms.

- **Tip:** The following sections describe how to set global options in the software. The features mentioned are described in detail in previous chapters in this user's guide. If you need more detail about a particular feature, please go to the proper location in this user's guide by consulting the index.

Accessing the Program Options

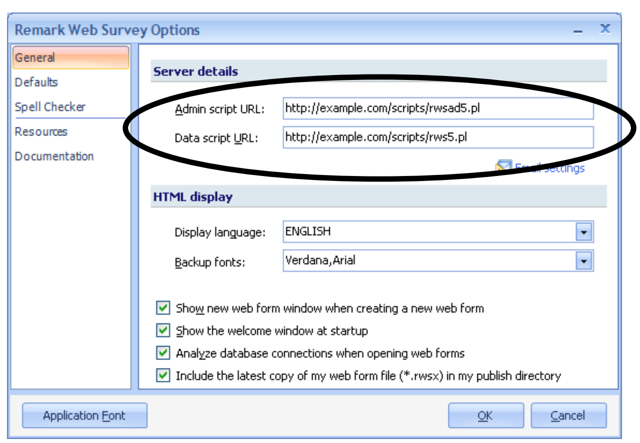
You can modify settings that control how the software looks and operates. Use the program options to perform software customization. Once you input program settings, they remain in place until you change them again.

To display the program options

1. Select the Application Button and then click Web Survey Options.

The Remark Web Survey Options window appears. Continue to the next sections to learn more about the available options.

Server Details



The **Server details** area of the **General** section allows you to set up details related to interaction with the Remark Web Survey Server component. We strongly recommend that you enter this information in the software upon installation. Much of the information is needed in the web forms that you create. By placing it in the program options, your resulting web forms automatically have the correct server information. The following options can be set:

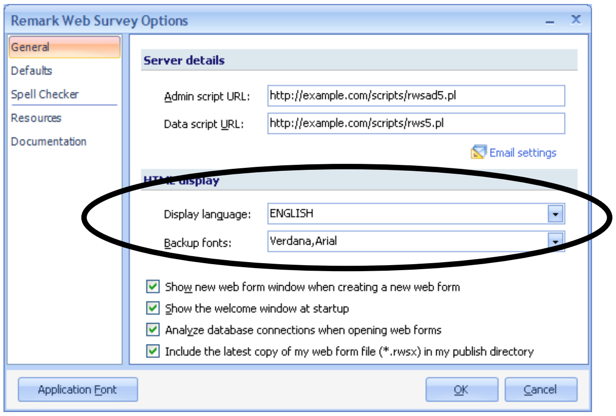
- **Note:** When configuring email options, you can use an SMTP server or the Sendmail protocol to send emails from Remark Web Survey. Emails can be used for three different functions in Remark Web Survey: 1) the built-in email client that is used to send web form invitations and reminders (SMTP only), 2) submission notification emails that are sent every time a web form is completed by a respondent, or 3) pause page reminders to resume a web form once it is started and stopped. The email server is set up and configured outside of Remark Web Survey. Once you have determined the type of email method to use and verified it is working, you can configure Remark Web Survey to use it.

Option	Function
Admin script URL	The URL (path) to the Remark Web Survey Administration Script (rwsad5.pl). This script is posted on the web server and is necessary for web form administration. Your webmaster or whoever installed the scripts should be able to provide this URL to you. This entry must be a fully qualified URL (e.g., http://www.example.com/cgi-bin/rwsad5.pl).
Data script URL	The URL (path) to the Remark Web Survey Data Script (rws5.pl). This script is posted on the web server and is necessary for web form data collection. Your webmaster or whoever installed the scripts should be able to provide this URL to you. This entry must be a fully qualified URL (e.g., http://www.example.com/cgi-bin/rws5.pl).
Email settings	Click the **Email settings** link to enter email settings for form submission notifications and use of the built-in email client.
Admin email address	Enter the web form administrator email address (e.g., webmaster@example.com). This email address is provided to respondents when they encounter problems submitting a survey.
Use SMTP method to transport email messages (Web Server tab)	The **Web Server** settings are used to set up email transfers that originate on the web server, such as pause page reminder emails and respondent submission emails. Mark the **Use SMTP method to transport email messages** option to use Simple Mail Transport Protocol for sending notification emails. You need to have a valid SMTP server set up outside of Remark Web Survey.
SMTP Server	Enter the **SMTP server** address (e.g., mail.example.com).
SMTP Port	Enter the **SMTP port** that email transfers use (typically port 25).
Username	If using authentication, enter a valid **username**.
Password	If using authentication, enter a valid **password** for the username specified.
Use Sendmail method to transfer email messages (Web Server tab)	Mark the **Use Sendmail method to transfer email messages option to use Sendmail for sending notification** emails. Sendmail is an open source email transfer agent. You need to have Sendmail set up outside of Remark Web Survey.

Option	Function
Server path	Enter the Sendmail **Server path** (e.g., /usr/sbin/sendmail)
Use SMTP method to transport email messages (Local Machine tab)	The Local Machine settings are used to set up email transfers that originate from the Remark Web Survey software, such as email invitations and reminders. Sendmail is not available for Local Machine settings. Mark the **Use SMTP method to transport email messages** option to use Simple Mail Transport Protocol (SMTP) for sending notification emails. You need to have a valid SMTP server set up outside of Remark Web Survey. Once the SMTP server is functioning, the SMTP server information can be set up ahead of time in the Remark Web Survey program options by your website administrator (see Chapter 2 for further details). Please note that your website administrator can advise you on what email method you are to use and the proper settings.
SMTP Server	Enter the **SMTP server** address (e.g., mail.example.com).
SMTP Port	Enter the **SMTP port** that email transfers use (typically port 25).
Enable a secured (SSL) connection	Mark the **Enable a secured (SSL) connection** checkbox to transmit information over Secure Sockets Layer (SSL), which provides security and data integrity for communications.
Use the default credentials of the currently logged in user	If you need to use authentication, you can enter credentials or use those of the user. Mark the **Use the default credentials of the currently logged in user** checkbox to utilize the user's credentials (e.g., the person logged in when sending the emails from the Remark Web Survey Designer component). Otherwise, continue below to enter specific credentials.
Username	If using authentication, enter a valid **Username**.
Password	If using authentication, enter a valid **Password** for the username specified.
Throttle Rate	The **Throttle rate** adds a delay while sending emails. The default setting is 500ms, meaning that one email is sent every 500 ms (in other words, two emails are sent per second). Throttling emails keeps the SMTP server from being overloaded when sending large numbers of emails.
Timeout	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.

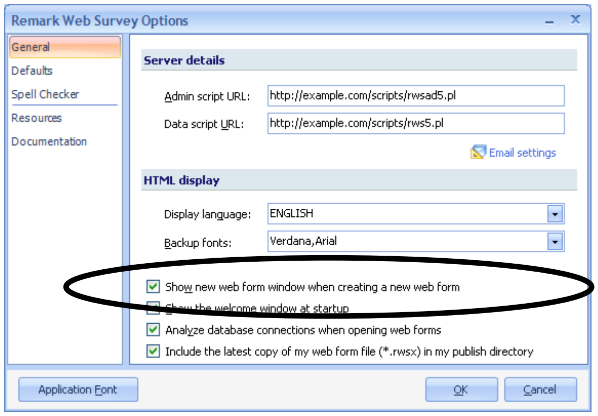
HTML Display

The **HTML display** area allows you to set the default Display language to use for web forms. The language selected here is specified in the HTML source code of web forms that you create (this is called a "lang" tag in HTML). Please note that whether the language's characters display correctly is dependent upon the character set specified on the respondents' computer.



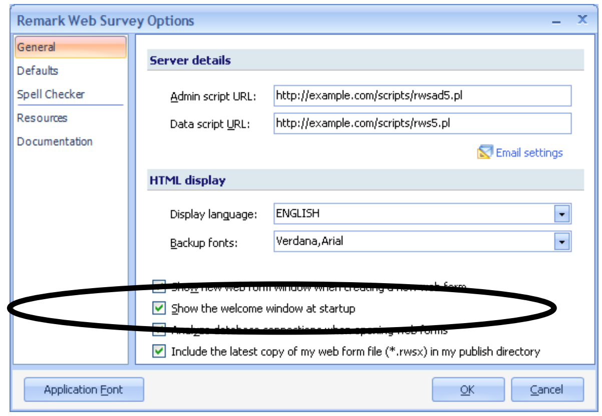
The **Backup fonts** area allows you to select fonts to use on the web form when respondents do not have the fonts you have selected for a web form on their computer. For example, you may apply rich text formatting to questions on your web form in a font that a respondent does not have on his or her computer. If the computer cannot find the font you specified, it uses the **Backup fonts** specified in the software's program options. By default, **Verdana** and **Arial** are selected; these fonts are common to most systems. Using two or more fonts provides a greater likelihood of finding a font that the respondent has on his or her system, which gives you some level of control over the look and feel of your web form.

New Web Form Window



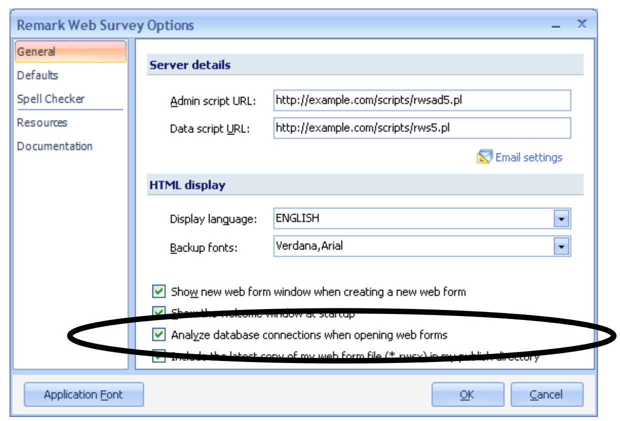
Remark Web Survey displays a New Web Form window by default each time you begin a new web form. On the New Web Form window, you can specify a web form name, special pages desired, etc. (see Chapter 3 for complete details for using the New Web Form window). Essentially it creates the shell of the web form so that you can then start adding other elements. The New Web Form window can be hidden if desired. If you wish to show the New Web Form window (it is shown by default), place a checkmark in the Show new web form window when creating a new web form checkbox. If you do not use this feature, when beginning new web forms, the web form is created with one standard page and a web form complete page by default.

Welcome Window



Remark Web Survey displays a welcome window by default each time you start the software. The welcome window provides shortcuts to begin a new web form, open an existing web form or convert a Remark Office OMR or Remark Classic OMR template file. The welcome window can be hidden if desired. If you wish to show the welcome window (it is shown by default), place a checkmark in the Show the welcome window at startup checkbox.

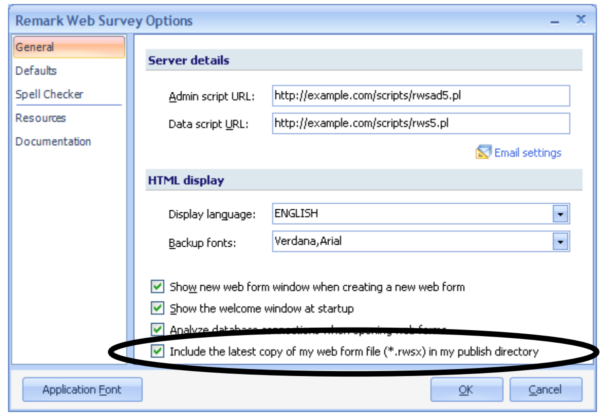
Analyze Database Connections



Remark Web Survey has a Database Link feature that allows you to connect a question to an external database in order to look up and add information from the database to a web form's data (see Chapter 5 for a description of Database Linking). In order to use this feature, the connection to the database must remain constant. If the database is moved or renamed after the connection is established, the feature no longer works. Remark Web Survey can automatically check the database connection for any web form using this feature each time the web form is opened. If the connection is broken, a warning message appears and you have the option to update the connection. If you wish to have the database connections analyzed (it is on by default), place a checkmark in the **Analyze database connections when opening web forms** checkbox.

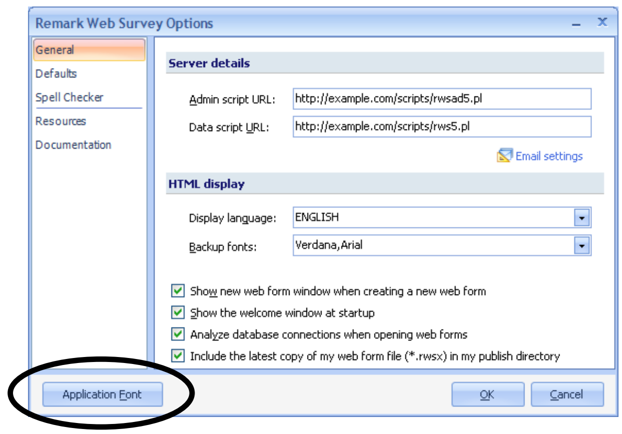
Include Web Form When Publishing

When you publish a web form to the server, Remark Web Survey provides the option to publish the .rwsx file to the server. This file is only used in the Designer application. However, publishing a copy to the server provides you with a backup file in case the one on your computer is accidentally lost. We recommend having this option set (it is on by default).



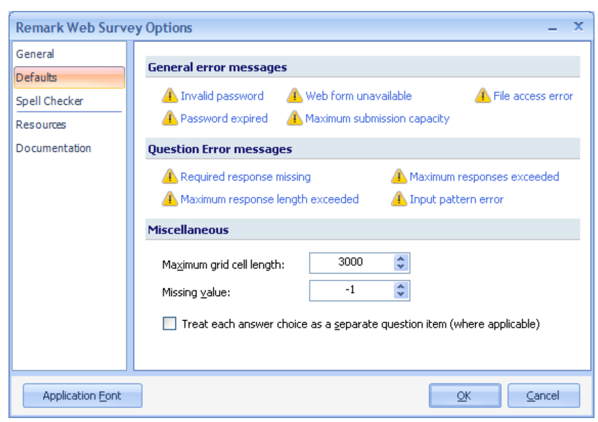
Application Font

The **Application Font** button allows you to select the type of font used throughout Remark Web Survey Designer component windows. Click the **Application Font** button to choose a font for your program. This font does not affect the actual web forms that are produced. Please note that selecting very large sized fonts may adversely affect how text is displayed in Remark Web Survey windows.



Defaults

The Defaults area allows you to specify default error message text for the various errors that can occur when respondents are taking a web form. By defining default text in the program options, all web forms that you create utilize the text. You may still customize an individual web form by selecting an element and customizing its properties or by customizing a Server Error page within a web form. The following error messages can be customized:



Error Message	Purpose
Invalid Password message	Customize the error message that appears when a respondent uses an invalid password to access a web form.
Password expired message	Customize the error message that appears when a respondent uses an expired password to access a web form.
Web form unavailable message	Customize the error message that appears when a respondent attempts to access a web form outside of its availability window.
Maximum submission capacity message	Customize the error message that appears when a respondent attempts to access a web form that has already reached the maximum number of submissions.
File access error message	Customize the error message that appears when a respondent tries to access web form pages to which they do not have access.
Required response missing message	Customize the error message that appears when a respondent fails to answer a question set with the required attribute.
Maximum response length exceeded message	Customize the error message that appears when a respondent enters too much text in a text area.
Maximum responses exceeded message	Customize the error message that appears when a respondent chooses more responses than are allowed for a checkbox or drop-down box question.
Input pattern error	Customize the error message that appears when a respondent enters text into a textbox that does not match the input pattern you have applied to the textbox.

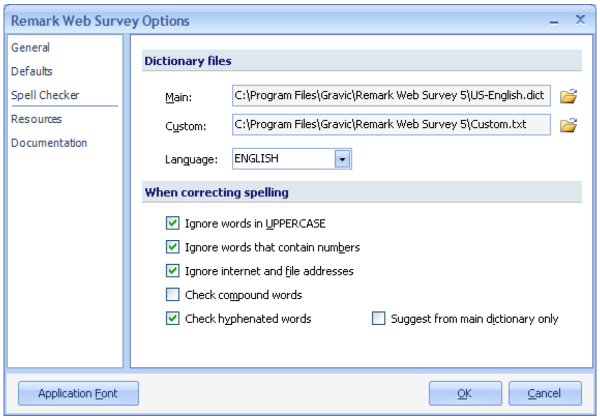
Under Defaults, there are also three miscellaneous items you can customize:

Error Message	Purpose
Maximum grid cell length	Use the **Maximum grid cell length** property to enter the maximum amount of characters that can be contained in a single grid cell. This setting applies to the Data Viewer grid, branching grid, advanced notification grid, login page password criteria builder and the grids used to store answer information when setting up questions. The default value is 3000. Increase the value if you encounter difficulties storing text or executing complex question branching.

Error Message	Purpose
Missing value	Use the **Missing value** property to change the number associated with missing values in your data. Missing values are any data that are not valid (e.g., data exists in a cell that does not match what was defined for the question, or when a question is unanswered). The missing value is used in Remark Quick Stats and when exporting data to the SPSS file format. The default missing value is -1, which you can adjust to a different number if desired.
Treat each answer choice as a separate question	Use the **Treat each answer choice as a separate question** to turn on this property by default whenever you create a checkbox or drop-down list style question that allows multiple responses. Each answer choice is treated as a unique question, occupying its own cell in the Data Viewer grid. You may still change the property on the fly for certain questions as you build web forms.

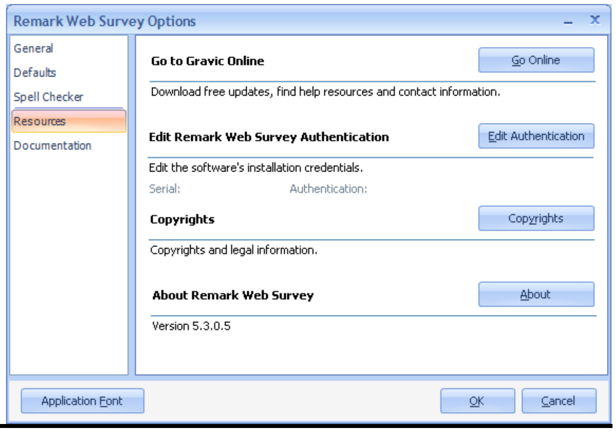
Spell Checker

The **Spell Checker** area allows you to specify spell checker options. Under **Dictionary Files**, you can select the location where your dictionaries are found. There is a **Main** dictionary and a **Custom** dictionary. Remark Web Survey first uses the main dictionary and then as you add custom spellings it creates the custom dictionary. When performing spell check functions, the software uses both dictionaries unless you mark the checkbox titled **Suggest from main dictionary only**. In the **Language** box, you can select the language for your spell check dictionary files. **The When correcting spelling** area allows you to select the options you wish the spell checker to use: **Ignore words in UPPERCASE**, **Ignore words that contain numbers**, **Ignore internet and file addresses, Check compound words**, **Check hyphenated words**, **Suggest from main dictionary only**. These options can help you customize how the spell checker reviews your web forms.



Resources

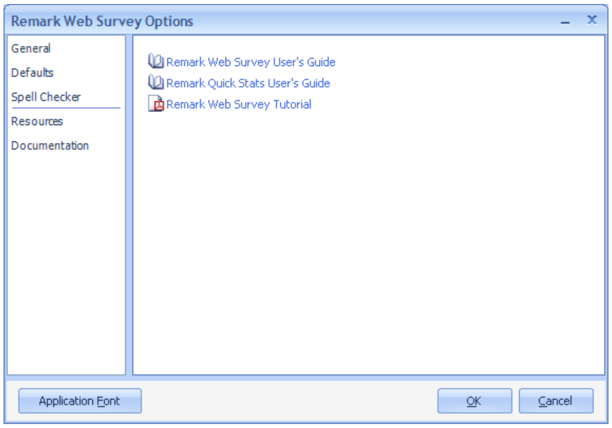
The Resources area allows you to reach Gravic, Inc. online and view information about the software. The following options are available:



Option	Description
Go to Gravic Online	Click the **Go Online** button to go to the Gravic website, where you can find product and support information.
Edit Remark Web Survey Authentication	Click the **Edit Authentication** button to enter a new serial number and authentication code for the software. This feature is typically used to upgrade to a new version of the software or unlock features. It should only be used when directed by Gravic personnel.
Copyrights	Click the **Copyrights** button to view copyright and legal information pertaining to Remark Web Survey.
About Remark Web Survey	Click the **About** button to view information about Remark Web Survey. This area also shows the current version level of the software.

Documentation

The Documentation area gives you quick access to Remark Web Survey's supporting documentation. You can access the Remark Web Survey User's Guide, Remark Quick Stats User's Guide and the Remark Web Survey Tutorial by clicking the appropriate link in this window. Please note that documentation is in PDF format; you need a PDF reader in order to use these links.



Appendix A: Remark Office OMR/Remark Classic OMR

Overview

Remark Web Survey can be used as a standalone web form tool or in conjunction with Remark Office OMR and Remark Classic OMR. Remark Office OMR and Remark Classic OMR are forms processing applications that collect information from paper-based forms and convert it to data that can be analyzed within the software or exported to another program for analysis. These software packages use template files that define the areas of a paper form to be recognized and the output to be generated. The software then uses a scanner to collect the data from the forms. Once the data are collected, Remark Office OMR and Remark Classic OMR are used to tabulate or grade the data, or the data can be saved in a format compatible with virtually any spreadsheet, database or survey design package for further analysis.

The following chapter is designed to help Remark Office OMR and Remark Classic OMR users understand how Remark Web Survey can interact with their existing Remark Office OMR or Remark Classic OMR software. Topics that are covered include:

- Converting Remark Office OMR and Remark Classic OMR templates into Remark Web Survey documents.
- Combining data collected in Remark Web Survey with data collected in Remark Office OMR and Remark Classic OMR for analysis.

Converting Templates

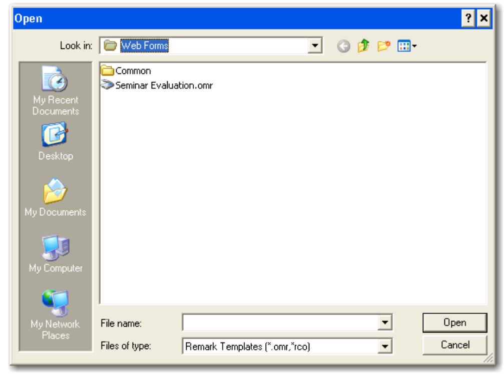
Existing Remark Office OMR (version 7 and higher) and Remark Classic OMR (version 3 and higher) templates can be converted into web-based forms for publishing on a web server. The benefit of converting a template to a web form is that you can collect the same data as on the paper-based form over the web. In other words, you have two different mechanisms for collecting the same data. When a template is converted, the original template can still be used in Remark Office OMR or Remark Classic OMR. The data collected in Remark Web Survey can then be combined with data gathered in Remark Office OMR or Remark Classic OMR for complete analysis. It is recommended that the templates you convert make use of question text. This question text becomes the question text in your web form. If there is no question text in the template that is converted, you need to enter it in the web form.

To convert a template

1. Open Remark Web Survey.
2. Select the **Application Button** and then click **Convert** to display the **Open** window.

- **Note:** When you first start Remark Web Survey, if you are showing the **Welcome** dialog, you may choose the option on this screen for **Convert a Remark Office or Classic Template** to open a template file.

3. Select a Remark Office OMR (.omr) or Remark Classic OMR (.rco) template and then click the **Open** button.



The template is displayed as a Remark Web Survey web form. You may now modify the look of the web form as desired. If you plan to combine web data with data collected from the paper forms, do not change the structure of the form (e.g., add questions, remove questions, reorder questions, etc.). If the web form does not match the paper form's template, the data will not match.

When converting templates, the web form name is based on the template name. The Admin and Data Script URLs are entered on the web form properties based on those entries in the Remark Web Survey program options (see Chapter 12 for more information).

- **Caution:** When modifying converted templates, adding or deleting questions will result in importing data problems when combining the data with data from Remark Office OMR or Remark Classic OMR. The data collected in Remark Web Survey will not match the data that were collected in the other packages. If you plan to use the data from both programs together, only make basic formatting modifications to the converted web survey.

Data Collection and Analysis

The Remark Web Survey Server component is used to collect data from web forms. For forms that have been converted from Remark Office OMR or Remark Classic OMR templates, the data collected in Remark Web Survey can be combined with data that was collected in the paper scanning Remark software.

Remark Quick Stats is essentially the same in all of the Remark products. Therefore, you can combine data collected from the various Remark products in any one of those products. For the purposes of this user's guide, we outline how to analyze the data in Remark Web Survey.

Once the data has been collected in both programs, you may open it in Remark Web Survey. We recommend saving data to the Remark (.rmk) format in both programs to ensure compatibility. Note that this format saves the data in the order in which the fields (questions) are defined. If you remove, add or rearrange questions, it causes incompatibility in your data sets.

To tabulate or grade data from both programs

1. If not already running, start Remark Web Survey.
2. Open the desired web form.
3. Switch to the **Data Viewer** and open the data file that was saved in Remark Web Survey. Or, download the data from your web server.

4. Open the data file(s) that was saved previously in Remark Office OMR or Remark Classic OMR. A second grid opens. (Note: You may also choose to append it to the existing data grid when prompted.)
5. Select the **Tools** tab in the Ribbon and then choose the desired operation: **Advanced Survey** or **Advanced Grade**. Alternatively, if you chose to combine your data sets into one when the prompt appeared to append, you can use Easy Survey or Easy Grade.
6. In the **Analyze Data** window, mark the checkboxes for any open data grids that you wish to include in the operation.
7. Click the **OK** button to run the report.

Depending on the analysis function chosen, either the Grade or Survey Wizard appears. See the Remark Quick Stats User's Guide PDF file, located in Start|Programs|Remark Web Survey 5|Documentation, for further information about using Remark Quick Stats.

Special Note for "Other" Textboxes

If you have questions in your Remark Office OMR or Remark Classic OMR template that have textboxes appended to them, you need to append a textbox in Remark Web Survey to accommodate the textbox. When using the appended textbox, be sure to mark the checkbox for **Treat appended item's answer as a separate item with field name**. For example, if you have a multiple choice style question with the last option as "other" you may have a textbox where they can enter information in as their "other" response. In Remark Office OMR and Remark Classic OMR, you would have two separate regions/fields. Remark Web Survey, on the other hand, offers the appended textbox to handle this situation. With the appended textbox, you have the choice of outputting the write-in responses in the same data cell as the multiple-choice responses or treating them as separate items. If you do not use the option to treat the appended textbox as a separate item, it is considered one field and your data would not match that which was collected in Remark Office OMR or Remark Classic OMR. If using this type of field setup, use the appended textbox for the "other" textbox in Remark Web Survey but remember to mark **Treat appended item's answer as a separate item with field name**. This method gives you two fields in Remark Web Survey to match the two fields you have defined in Remark Office OMR or Remark Classic OMR.

Appendix B: Extended Glossary/Feature List

Remark Web Survey is rich with features; some of which you may use often and some that you may only need on occasion. The purpose of this extended glossary is to provide you with a listing of the software's features, a short description of the feature and the chapter where you can find more detailed information about the feature. For a complete listing of terms, please see the Glossary or Index.

Feature	Explanation
Admin Control Panel Access	The Admin Control Panel Access bar allows you to login to the administration script (rwsad5.pl) and publish web forms and download data. Details are found in Chapter 3.
Answer Piping	Answer piping allows you to "pipe" information from one question's answer to the text of another question, answer or a label on a web form. For example, if you have a question on the web form that asks for the respondent's name, you can then "pipe" that name into another question. Details are found in Chapter 5.
Auto Downloading Data	Auto data download allows you to download data from the web server without the assistance of a website administrator. You must first enable auto data downloads in the Remark Web Survey Control Panel (auto data downloads are enabled by default) and have a login that allows for data downloading. Then, you may open the web form in the Remark Web Survey designer, click the **Application Button** and then select **Download**. You are prompted to log in to your web server and then the data are automatically downloaded into the Data Viewer. If you use the **Download** button in the **Admin Control Panel Access** bar, you may choose to download all records or only download the new records since the last download. Data can then be exported or analyzed by Remark Quick Stats. Details are found in Chapter 10.

Feature	Explanation
Auto Form Publishing	Auto form publishing allows you to publish forms and related files (e.g., images) to your web server without the assistance of a website administrator. You must first enable auto publishing in the Remark Web Survey Control Panel, (auto publishing is enabled by default) and set up a user account that allows automatic form publishing. You must also enter the address of the administration script (rwsad5.pl) in the program options (click the **Application Button** and then choose **Web Survey Options**). As each web form is created, you then select the **Application Button** and click **Publish** to send the form to the web server. Each web form has its own folder on the web server, which contains the form pages, images, data file, log file, configuration files, password information (if applicable) and each respondent's tracking ID. You can specify the location to store these individual folders in the Remark Web Survey Control Panel. Details are found in Chapter 9.
Branching/Skip Patterns	Branching, also known as skip patterns, allows you to set up a form that jumps to various pages based on a how a question or questions are answered. For example, responding with a Yes to a question can send the respondent to one page. Responding with a No to the same question, can send the respondent to a different page. This type of setup makes it easier for the respondent to fill out a web form because he or she does not have to answer unnecessary questions. Details in Chapter 8.
Button Text and Images	The buttons used on a page- Submit, Reset, Back and Pause- can be customized. You can either enter your own text for the button, or you can import an image to use as the button. If you want to use an image, you must first create the image outside of Remark Web Survey. You can also customize the positioning (right, center or left) and order of these buttons on the page. Details are found in Chapter 5.
Database Link	Database Link allows you to link a question on a web form to an external database. You can then lookup one piece of information and report another piece of information from the same database. For example, suppose you have a database of student names and ID numbers. The students could enter their student ID numbers on the web form they submit. You could then lookup that student ID number and output the student's name (in addition to the ID number) when the data are downloaded. Details are found in Chapter 5.

Feature	Explanation
Data Export	Once form submissions are downloaded from the web server, the resulting data file can be exported to most common file formats, including Access, Excel, SPSS, ASCII and others. This feature allows you to analyze your data in most popular analysis packages. Details are found in Chapter 10.
Email Client	Remark Web Survey includes an email client that you can use to send web form invitations and reminders. It includes the ability to create and save email templates and the ability to import email addresses. The email client can work in conjunction with the Respondent ID feature, which tracks who has completed a web form (password-protected web forms only). Details are found in Chapter 9.
Email Notifications	Email notification allows you to specify an email address or addresses to which each form submission is sent. The email recipient receives one email per respondent, which contains that respondent's answers to the questions on the web form. You can also set up advanced options that allow you to send emails to the respondent or emails to specific email addresses based on how questions are answered. Details are found in Chapter 4.
Form Scheduling	You can schedule a window when a web form is active. Respondents are only able to access the web form during this timeframe. Details are found in Chapter 4.
Headers and Footers	You can add headers and footers to web form pages. Define the header and footer once, and then apply them to the desired web pages. Details are found in Chapter 5.

Feature	Explanation
Links- Providing Web Form Access	For each web form that you create in Remark Web Survey, you must provide your respondents with a link that they can use to access the form. You may wish to send respondents an email message with the link, or perhaps you will put the link on your website for them to click. In either case, the link you provide has a very specific format: http://www.example.com/CGI directory/rws5.pl?FORM=formname. In this example, CGI directory is the name of your CGI directory (e.g., cgi-bin, scripts), rws5.pl is the name of the Remark Web Survey data collection script and formname is the name of the web form to be submitted (the form name can be found on the top node of your web form in Remark Web Survey). If you use the auto publish feature to move web forms to your website, this link is provided to you automatically upon successful publishing. You can copy any web form's link by selecting **Copy Web Form URL to clipboard** in the **Web Form Details** area of the Remark Web Survey designer. This action places the link on the Windows clipboard, which you may then paste to an email, web page, web browser, etc. Details are found in Chapter 9.
Links- Embedded Passwords	In addition to the information above, you may also embed the password to access the web form in the link you provide to a respondent. In this case, use the same syntax as above, but add the following to the end of the link: &PWD=password, where "password" is the respondent's password. Example: http://www.example.com/cgi-bin/rws5.pl?FORM=formname&PWD=password. When the respondent clicks the link, they are automatically logged into the web form. Passwords can also be embedded into the link that is generated by the built-in email client. Details are found in Chapter 9.
Mobile Device Support	Allows you to preview a web form on a mobile device so that you can ensure browser compatibility. The mobile device must have a web browser capable of viewing and submitting web forms. Details are found in Chapter 3.

Feature	Explanation
Multimedia	Multimedia includes video and audio files that you wish respondents to view while submitting your web form. For example, suppose you are conducting a survey about a possible new product and want to show respondents a potential advertisement for the new product and then ask questions about it. Respondents can play the video clip (or audio clip) directly from the web form. Supported multimedia formats include: Moving Picture Experts Group (mpeg, mpg, mp3), Audio Video Interleave (avi), QuickTime (mov), Waveform (wav), Real Audio (ram, rm). Details are found in Chapter 5.
Password Protection	Password protection allows you to require respondents to enter a valid password before they can access your web form. Applying passwords to a web form is accomplished using a Login page. Passwords can be manually entered into Remark Web Survey or they can be imported from a database. You may also use the password list to include names and email addresses to track which respondents have submitted a web form. Missing or detected respondents can be sent to the built-in email client or exported to a file, which you could then use to contact those respondents via email (e.g., to send reminders or thank you notices). Details are found in Chapter 4.
Popup Info Page	A Popup Info page type can be used to display non-submission information. You can link to the popup info page to show respondents more information about the web form's questions. Details are found in Chapter 4.
Progress Bars	A progress bar shows respondents how much progress they have made on a multi-page web form and how much is still left to fill out. Details are found in Chapter 4.
Query Parameters	Using Query Parameters allows you to pass hidden information into a web form. When using hidden textbox questions, you can associate a Query Parameter with the textbox. When the URL 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. Details are found in Chapter 5.
Random Answer Order	Random answer order allows you to present the answers to questions in random order. Each respondent sees the answers in a different order (on a per question basis). This feature is especially useful when administering tests to cut down on the possibility of cheating or to eliminate survey bias. Details are found in Chapter 5.

Feature	Explanation
Random Page Order	Random page order allows you to present a multi-page web form in random order. Each respondent sees the pages in a different order. This feature is especially useful when administering tests to cut down on the possibility of cheating or to eliminate survey bias. Details are found in Chapter 8.
Reloading Pages	Remark Web Survey allows you to use forward and back options on web forms. You can add a Back button to multi-page forms so that respondents can go back and change their responses. Respondents should not use the browser's back button, as this can cause page sequencing errors. It is a good practice to place Back buttons on multi-page forms and advise respondents to use the web form's back and next buttons instead of the browser's buttons. Details are found in Chapter 5.
Response Confirmation Pages	A Response Confirmation page displays all of the respondent's answers to each question on the web form. The Response Confirmation page appears as the last page before the respondent submits the web form. It allows the respondent to review his or her responses and then go back and make changes if necessary. You can either provide a Back button on the Response Confirmation page or respondents can click a link next to any question on the Response Confirmation page to navigate back to questions they wish to change. Details are found in Chapter 4.
Respondent Capping	You can cap the number of respondents who can access a web form. Once the maximum is reached, respondents are no longer be able to access the web form. Details are found in Chapter 4.
Respondent Detection	Respondent detection works in conjunction with password protection. When you enter a list of valid passwords for a password-protected web form, you can optionally designate a name field and an email field. When you download the data for the form, Remark Web Survey can search through the passwords that were submitted to see who has and has not filled out the web form. The names and email addresses of those who have either filled out or not filled out the web form can then be sent to the built-in email client or exported to a file. You can then use this file to send email notifications to those who have not yet submitted the form reminding them to do so. Details are found in Chapter 10.

Feature	Explanation
Rich Text Formatting	Rich text formatting gives you greater flexibility in how text is formatted. Rich text allows you to format the font attributes of individual characters as opposed to an entire label or question's text. It also allows you to add bullets to your text. Details are found in Chapter 7.
Section 508 Compliance	Remark Web Survey can produce Section 508 compliant forms. Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d), requires that when Federal agencies develop, procure, maintain or use electronic and information technology, Federal employees with disabilities must have access to and use of information and data that is comparable to the access and use by Federal employees who are not individuals with disabilities, unless an undue burden would be imposed on the agency. Section 508 also requires that individuals with disabilities who are members of the public seeking information or services from a Federal agency have access to and use of information and data that is comparable to that provided to the public who are not individuals with disabilities, unless an undue burden would be imposed on the agency. When creating web forms, Section 508 requires the use of ALT tags for images in order to be compliant. Remark Web Survey supports this ALT tag usage through a property called Alternate Text, which you see any time you insert an image. The use of style sheets also assists with the creation of Section 508 compliant forms.
Sendmail Support	Remark Web Survey supports the Sendmail email method, which is an open source mail transfer agent. Details are found in Chapter 2.
Session Pause Pages	Session Pause pages allow respondents to pause a web form and then resume where they left off. Session Pause pages are especially useful for long web forms where respondents may not have enough time in one sitting to complete the web form. When respondents pause the form, they can either receive an email message with a link back to the web form or bookmark the page in a web browser. They can then continue the form submission at a later date. When they resume their submission, they are at the same place they left off, with all previous information already filled in. You can also set the length of time allowed to complete the web form. Note that you should advise respondents of this timeframe when you set up your Session Pause page. Details are found in Chapter 4.

Feature	Explanation
Session Timeouts	Session timeouts can be used in conjunction with password-protected web forms. If you enable session timeouts, the respondent is logged out of the web form if idle for a specified amount of time. Session timeouts coincide with page submissions. If a session timeout is set to 10 minutes, the respondent has 10 minutes in between page submissions to complete the page. For example, if the respondent submits page 1 of the web form and 10 minutes go by without submitting page 2, the respondent's web form times out. They are required to log in again, at which time their previously submitted data is reloaded. The purpose of a session timeout is to minimize the possibility of an unauthorized person gaining access to the web form. Details are found in Chapter 4.
SMTP Authentication	Remark Web Survey supports the MD5, login and plain forms of SMTP authentication. Details are found in Chapter 4.
Spell Checker	The Spell Checker allows you to check an entire web form for spelling errors. Dictionaries can be customized by language and you can add your own words to the existing dictionary. Details are found in Chapter 6.
Styles	Styles allow you to add aesthetic formatting to your web forms. You can create styles any way you wish. When you create a style, you set font types, sizes and colors, background colors, line colors, question table formatting and more. You can set these attributes for all of the elements on your forms (text labels, questions, answers, etc.). Using styles helps you match web forms to the general format of your website. By saving styles, you can quickly apply commonly used formatting to web forms. Details are found in Chapter 7.
Web Form Complete Pages	A Web Form Complete page is a success URL or "thank you" page that appears when a respondent submits a web form. It lets respondents know that they have finished filling out the web form. The web form complete page can contain images and labels. You can also add hyperlinks to redirect the respondent to another page on your website or a new website. Details are found in Chapter 4.
Web Server	A computer that maintains web information and returns requested files or documents to web browsers. You must have access to a web server to use Remark Web Survey. The web server holds the Remark Web Survey scripts, which are used for web form administration.