Surveys and Questionnaires

The Survey and Questionnaire feature lets you create and manage complex surveys or questionnaires without access to admin privileges. Questions, question sets, answers, and surveys can be specified by any staff user with appropriate permissions. Sets of questions and answers can be saved for later reuse.

- Regular users can manage sets of an unlimited number of questions without creating fields for each question.
- Individual questions may be given an identifier so their answers can be searched and reported on and they may be displayed in table views.
- The same questions may be used in multiple question sets and may behave differently in each set - required in some, ordered differently, and so on.
- A set of questions and their answers may be stored in one table for reuse and pulled into another table based on some matching criteria.
- Sets of questions may be made visibility dependent on specific answers so you can build a decision tree structure if desired.
- Different kinds of surveys can easily be combined into a single survey table with a "survey type" field defining the question set to display.

Survey Data Types

The Survey and Questionnaire functionality requires three data types that work in conjunction with each other:

- Question Description– allows users to define questions and answer types in a normal table record
- Survey Definition – allows users to select the questions for a particular questionnaire, define their order, visibility dependencies, and requirements
- Survey Presentation – stores an instance of a questionnaire or survey for a given record. It is used to define which survey definition applies, to display a set of questions defined by the selected survey definitions, and to store the combined questions and answers.

The next pages explains each of these data types and how they are best used.