

MANAGE WHAT MATTERS



Globalpark Enterprise Feedback Suite

EFS Hybrid Extension

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1 EFS Hybrid Extension



Version 1.1 of the manual for EFS Hybrid Extension is based on release 6.0 of the Enterprise Feedback Suite. Depending of what EFS version you are using, there may be minor differences between your installation and the features as documented in the manual.

You can download the EFS Survey manual 6.0 in the customer center at <http://my.globalpark.com>.

The optionally available EFS Hybrid Extension enables you to realize surveys online *and* offline in one go.

The questionnaire is entered online as usual. In the next step, the offline variant is configured. This offline variant is converted into a PDF file, which can be copied as required and distributed to the participants.

If you want to merge the results of the offline questionnaire with the results of the online questionnaire in EFS Survey after the end of the field phase, there are two options depending of size and situation of the project: You can either manually enter the results, or scan and import them into EFS Survey. At the moment, an interface to the software *Forms* by *Readsoft* is available for the scanning and importing - for details on scope and process, please see the Appendix, Chapter 6, p. 21.

Scope of software features:

In general

- EFS Hybrid Extension can be used in anonymous and personalized surveys, employee surveys and multi-source feedbacks.
- EFS Hybrid Extension supports Unicode standard, which means that it can be used e.g. for Chinese or Japanese surveys.

Questionnaire design online and offline

- The following EFS Survey question types can be used: 111, 112, 121, 141, 142, 311, 312, 340, 998 and 999.
- Fill-in instructions in the paper questionnaire can differ from the online variant.
- Filters can be realized in the paper questionnaire by using leap commands. These can be displayed for each question and in question type 111 for each answer category as well.
- You can insert page breaks in the paper questionnaire to achieve a harmonious and meaningful overall picture.
- It is possible to insert single questions or pages which are used only in the paper variant of the questionnaire. In online mode, these questions or pages are not visible.
- Multiple paper versions of a questionnaire can be created and managed in one single project. E.g. it is possible to generate paper questionnaires for the various departments of a company that differ regarding content or layout. In multilingual projects you can create paper questionnaires for the various language versions.

Layout of the paper questionnaires

- The HTML tags , <i> and <u> (bold, italics and underlined) can be used in the questionnaire texts. They are supported by the process that generates the PDF file. Other tags can be used to format the online questionnaire, but will be removed during creation of the paper questionnaires (the content won't be affected by this process).
- Margins can be freely defined.
- The type face of the paper questionnaire can be defined by the user. The colour of the texts can not be modified.
- The layout can be designed by uploading user-defined templates in PDF format. This allows e.g. the integration of individual headers, footers, watermarks or a background on the paper questionnaire.
- Images can not be used.

Collecting the data from the offline survey in EFS Survey

If the results of the offline survey are to be collected inside EFS Survey, it is necessary to either manually enter them or scan and import the paper questionnaire data. For scanning and importing, an interface to the software *Forms by Readsoft* is available, see the Appendix, 6, p. 21, Chapter for details.

There are various options how the offline data can be collected and stored inside EFS Survey:

- In anonymous projects the data collected offline will be entered imported as “normal” datasets.
- In personalized projects, it is possible to generate PDFs with a personalized participant code on the cover, based on the participant data in the participant administration. The result data can be either assigned to the participants during import, or they can be imported as new datasets with a dummy e-mail address.

2 Planning a Survey that Takes Place Online and Offline

2.1 Tips for Planning

Realizing a survey both on- and offline is a challenge regarding methodic preparations because of the diverse media (online survey and paper questionnaire). Therefore it is important to consider the following questions, which are usually not required when preparing an online-only questionnaire:

- Which elements will be fundamentally different in online and paper questionnaire? E.g. should the paper questionnaire have a cover? Should the first page of online and paper questionnaire contain different information on the survey, e.g. different fill-in instructions or contact addresses for technical problems?
- Which typical online questionnaire features are to be used? Is it possible to transfer these features into a paper questionnaire, is it necessary to modify them (e.g. filters can be realized by use of leap commands) or is it impossible to use them (e.g. hiding conditions on item level or dynamic lists)?
- Is it necessary to create several versions of the paper questionnaire? EFS Hybrid Extension allows this.
- Do you intend to merge the data from the online and offline survey after end of the field phase? Is this to happen inside EFS Survey? If yes, how do you intend to enter/import the data collected offline and how should they be stored?

Transformation of an online questionnaire into a paper questionnaire

Elements that need to be strongly modified:

- Filters have to be replaced by leap commands.
- The length of open-ended answers needs to be limited. If you use the Forms interface, please note that in principle, Forms can only interpret up to 127 characters per entry field.
- Question type 142 (Text field multiple row) can be used. But you should not make the entry fields too big and it is necessary to test if the entries are really processed.

Elements that can in principle not be used offline:

- Hiding conditions on item level
- Wildcards that are filled with personalized, participant-specific information or with content of survey variables.
- Lists and loops
- Question types which are not supported by EFS Hybrid Extension. The following EFS Survey question types *can* be used: 111, 112, 121, 141, 142, 311, 312, 340, 998 and 999.
- Features that require JavaScript.
- Multimedia elements can only be integrated into the survey by use of a second medium.

2.2 Steps

The following steps are necessary:

1. Entering the questionnaire in the admin area of EFS Survey
2. Configuring the online questionnaire and one or several paper questionnaires
3. Creating the layouts for online and paper questionnaire
4. Creation of the PDF and the scan form definition file for each version of the paper questionnaire
5. Copying and distributing the print-outs of the PDF, or if several versions are used the various versions, to the participants
6. Realization of the survey
7. If you want to merge the results of the offline questionnaire with the results of the online questionnaire in EFS Survey after the end of the field phase, there are two options:
 - entering the results manually
 - scanning and importing the results into EFS Survey, using the Forms interface. See the Appendix, Chapter 6, *p. 21*.

3 Creating and Editing Paper Questionnaires

3.1 Defining Content of Online and Standard Paper Questionnaire

First, you create the complete questionnaire, *including all elements that are to be used only in the online or only in the paper variant*. Then, you can configure manually in the questionnaire editor which questions are to be used in the online variant and in the Standard version of the paper questionnaire. To do so, proceed as follows:

1. Open the **Projects->{Selected project}->Questionnaire editor** menu.
2. Make sure you are working in the classic questionnaire editor: The feature needed has not been implemented in the Drag&Drop editor.
3. Activate the **Edit offline / online variante** option in the **View** dialog and confirm with **Submit**.

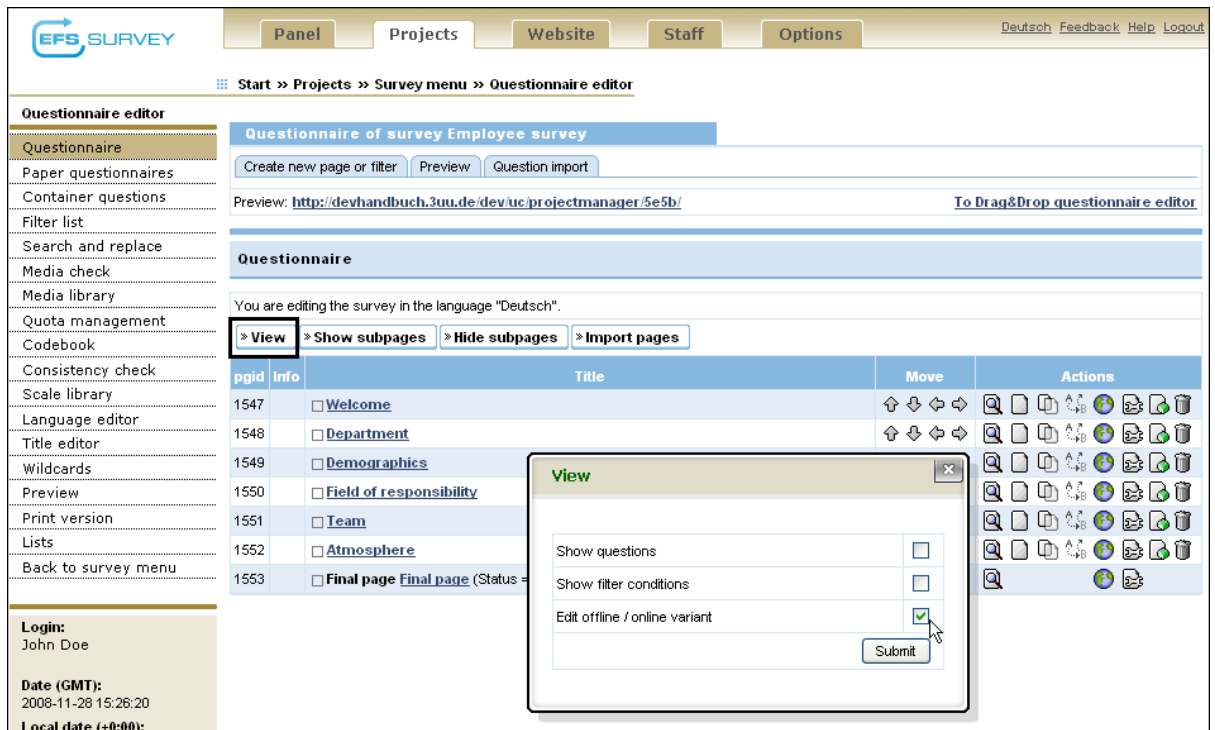


Abbildung 3.1 Starting to edit the paper version in the questionnaire editor

4. Two additional columns with checkboxes will be displayed. They allow to select which questions should be included in the online questionnaire and which questions should be included in the Standard paper questionnaire version. Choose the required questions for each variant.

Questionnaire of survey Employee survey

Create new page or filter Preview Question import

Preview: <http://devhandbuch.3uu.de/dev/uc/projectmanager/5e5b/> To Drag&Drop questionnaire editor

Questionnaire

You are editing the survey in the language "English".

» View » Show subpages » Hide subpages » Import pages

| pgid | Info | Title | Move | Online | Offline | Actions |
|------|--------------------------|--|---------|-------------------------------------|-------------------------------------|---------|
| 1547 | <input type="checkbox"/> | Welcome | ↑ ↓ ⇄ ⇄ | <input type="checkbox"/> | <input type="checkbox"/> | |
| | | Question Start Online Questionnaire (type 998) | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |
| | | Question Start Offline Questionnaire (type 998) | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 1548 | <input type="checkbox"/> | Department | ↑ ↓ ⇄ ⇄ | <input type="checkbox"/> | <input type="checkbox"/> | |
| | | Question Department (type 111) | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 1549 | <input type="checkbox"/> | Demographics | ↑ ↓ ⇄ ⇄ | <input type="checkbox"/> | <input type="checkbox"/> | |
| | | Question Age (type 111) | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 1550 | <input type="checkbox"/> | Field of responsibility | ↑ ↓ ⇄ ⇄ | <input type="checkbox"/> | <input type="checkbox"/> | |
| | | Question Field of responsibility (type 311) | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 1551 | <input type="checkbox"/> | Team | ↑ ↓ ⇄ ⇄ | <input type="checkbox"/> | <input type="checkbox"/> | |
| | | Question Team (type 311) | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 1552 | <input type="checkbox"/> | Atmosphere | ↑ ↓ ⇄ ⇄ | <input type="checkbox"/> | <input type="checkbox"/> | |
| | | Question Atmosphere (type 340) | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| 1553 | <input type="checkbox"/> | Final page Final page (Status = 31) | ↑ ↓ ⇄ ⇄ | <input type="checkbox"/> | <input type="checkbox"/> | |
| | | Question Final page (type 998) | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

Save selection

Figure 3.2 Selecting questions for offline and online variant

5. Confirm by clicking **Save selection**.

3.2 List of Paper Questionnaire Versions

Only after selection of the questions, you configure the paper questionnaire version and if required create additional versions. To do so, navigate to the **Projects->{Selected project}->Questionnaire editor->Paper questionnaires** menu.

EFSS SURVEY

Panel Projects Website Staff Options Deutsch Feedback Help Logout

» Start » Projects » Survey menu » Questionnaire editor » Paper questionnaires

Paper questionnaires

Version list
Back to questionnaire

Management of the versions: Employee survey

The paper questionnaire may be different to the online version. Here you can create different paper versions of the online questionnaire and then define which pages should be included and which language should be used.

List of the versions

» Create new version

| Title | Actions |
|----------|---------|
| Standard | |

Login:
John Doe

Date (GMT):
2008-11-18 15:57:41

Local date (+0:00):
2008-11-18 15:57:41

Panel date (-):
2008-11-18 15:57:41

Abbildung 3.3 Managing paper questionnaires

In the content area you can find a list of all currently-existing paper questionnaire versions.

At the beginning this list contains only the automatically-created version “Standard”: you have already defined the content of this version in Chapter 3.1, p. 9. This standard version can be renamed and edited according to the instructions in Chapter 3.2.2, p. 12 and following, but it is not possible to delete it.

To create additional versions, follow the instructions in Chapter 3.3, p. 16.

3.2.1 Editing Paper Questionnaire Version

If you click the title of one of the paper questionnaire versions in the list, the menu for this specific version opens.

| pgid | Title | Offline |
|------|--|-------------------------------------|
| 1547 | <input type="checkbox"/> Welcome | <input type="checkbox"/> |
| | Question Start Online Questionnaire (type 998) | <input type="checkbox"/> |
| | Question Start Offline Questionnaire (type 998) | <input checked="" type="checkbox"/> |
| 1548 | <input type="checkbox"/> Department | <input type="checkbox"/> |
| | Question Department (type 111) | <input checked="" type="checkbox"/> |
| 1549 | <input type="checkbox"/> Demographics | <input type="checkbox"/> |
| | Question Age (type 111) | <input checked="" type="checkbox"/> |
| 1550 | <input type="checkbox"/> Field of responsibility | <input type="checkbox"/> |
| | Question Field of responsibility (type 311) | <input checked="" type="checkbox"/> |
| 1551 | <input type="checkbox"/> Team | <input type="checkbox"/> |
| | Question Team (type 311) | <input checked="" type="checkbox"/> |
| 1552 | <input type="checkbox"/> Atmosphere | <input type="checkbox"/> |
| | Question Atmosphere (type 340) | <input checked="" type="checkbox"/> |
| 1553 | <input type="checkbox"/> Final page Final page (Status = 31) | <input type="checkbox"/> |
| | Question Final page (type 998) | <input checked="" type="checkbox"/> |

Abbildung 3.4 Menu of a paper questionnaire version

On the tabs in the content area you can configure the current version:

- **Edit version:** On this tab you can decide which questions are to be used in the current paper questionnaire version. The entry form is explained in Chapter 3.3, p. 16.
- **Settings:** On this tab you configure the most important characteristics of the paper questionnaire version. See Chapter 3.2.2, p. 12.
- **Edit paper questionnaire:** On this tab you can insert page breaks and enter instructions for completing the paper questionnaire. See Chapter 3.2.3, p. 14.
- **Preview:** On this tab, you can check if the resulting PDF fulfils expectations. See Chapter 3.2.4, p. 15.

In the menu you can find functions required for the further processing of the current paper questionnaire version:

- **Edit layout:** See Chapter 4, p. 17.
- **Export scan files:** See Chapter 5, p. 20.

- **Import scan files:** See Chapter 6.3, p. 22.

3.2.2 Defining Settings for One Version of the Paper Questionnaire

In the **Projects->{Selected project}->Questionnaire editor->Paper questionnaires** menu, click on the title of the version which you want to edit. Then, choose the **Settings** tab to configure the most important characteristics of the current paper questionnaire version.

1. Settings

Questionnaire settings

The following options help to adapt the questionnaire to the environment of an offline questionnaire:

- **Show fill-in instructions:** Entry fields that can be filled with fill-in instructions will be displayed on the **Edit paper questionnaire** tab. These fill-in instructions are not identical with the instructions defined in the questionnaire editor for the online questionnaire. For each paper questionnaire version, you can enter different fill-in instructions.
- **Show question numbers:** The questions are automatically numbered. You can change the numbers manually on the **Edit paper questionnaire** tab.

Language

If the project is multilingual, you can select the language in which this version of the paper questionnaire should be created.

Leap commands

Leap commands are hints added to questions or answer options that assume the role of filters and hiding conditions. Depending of the answers given, they refer the respondents to the next questions that suit for them, inappropriate questions will be skipped.

If the leap commands function is activated, the free entry fields which you can use to give hints will be displayed on the **Edit paper questionnaire** tab besides the questions.

Personalization

In personalized surveys you can mark each questionnaire with an individual code. The options for positioning the code field are explained in the following table.



If you collect data offline, the code may cause scruples regarding anonymity. On the other hand, if you want to import the data at the end of the survey, but do not use a code, dummy datasets will be created during import. This may cause discrepancies in the field report: the dummy datasets will be counted as participants. Also, if the offline participants have been uploaded into the participant administration initially, it is in theory possible that they participate twice, online and offline.

| Field | Description |
|---|--|
| Code will be printed on the questionnaire | Activates display of the code. |
| Code prefix | The prefix is used to label the code field. It should be alphanumerical and have ten or less characters. |

Table 3.1 Positioning the code field

| (Forts.)Field | Description |
|---|--|
| Page on which the personalized code should appear | The cover page, the first page and the last page are offered as options. |
| Left position of the code in mm | You can use this field to adjust the position of the code field on the page. |
| Top position of the code in mm | You can use this field to adjust the position of the code field on the page. |
| Code alignment | The code field can be aligned left, right or center. |

Table 3.1 Positioning the code field

2. Choosing settings

Proceed as follows:

1. Open the **Settings** tab.

The screenshot shows the 'Settings' tab for a questionnaire. The title bar reads 'Edit version: Employee survey: Sales Representatives'. Below the title bar are navigation buttons: 'Back', 'Edit version', 'Settings' (selected), 'Edit paper questionnaire', and 'Preview'. The main content area is divided into sections: 'Questionnaire settings' with checkboxes for 'Show fill-in instructions' and 'Show question numbers' (both checked); 'Language' with a dropdown menu set to 'English'; 'Leap commands' with a checked checkbox for 'Show leap commands'; and 'Personalization' with a checked checkbox for 'Code will be printed on the questionnaire', a text input for 'Code prefix' (value: 'code'), a dropdown for 'Page on which the personalized code should appear' (value: 'Cover page'), text inputs for 'Left position of the code in mm' (value: '20') and 'Top position of the code in mm' (value: '25'), and a dropdown for 'Code alignment' (value: 'Left'). A 'Save' button is located at the bottom right.

Figure 3.5 Defining settings

2. Decide if fill-in instructions should be shown.
3. Decide if question numbers should be shown.
4. If the project is multilingual, you can choose the language as desired.
5. If you want to display leap commands, activate the corresponding checkbox.
6. If you want to add a personalized code to the questionnaire, you can activate the corresponding checkbox in the “Personalization” section and position the code field on the page as required. Please mind that this section of the tab is only visible in personalized projects.
7. Confirm by clicking **Save**.

3.2.3 Editing Paper Questionnaire

1. Change to the **Edit paper questionnaire** tab. On this tab you can see the paper questionnaire layout according to your settings.

Edit version: Employee survey: Sales Representatives

Back

Edit version Settings Edit paper questionnaire Preview

» Reset question number

Here you can add fill-in instructions for the offline version and insert page breaks. Furthermore you can create texts here for leap commands in the offline version.

Save

Please answer the following questions concerning your field of responsibility.

Please mark the correct rating with a cross.

1

| | I fully agree | I agree | I partly agree | I rather not agree | I do not agree at all |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| My work corresponds to my professional interests | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| My work allows me to fully apply my professional knowledge and skills | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I can influence important decisions that have an impact on my work | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I have the ability to make decisions regarding the work I have to do | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Within my job I am able to demonstrate personal initiative | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Insert page break after this question

Please apply the following statements to the team or group in which you spend the most working time.

Please mark the correct rating with a cross.

2

| | I fully agree | I agree | I partly agree | I rather not agree | I do not agree at all |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| I can count on the support of the other members of our team | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Issues are dealt with openly in our team | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Figure 3.6 Editing the paper questionnaire

2. Depending of the configurations on the **Settings** tab you can enter specific fill-in instructions, number the questions or enter leap commands.
3. Insert page breaks as required.
4. Confirm with **Save**.

3.2.4 Checking Settings in the Preview

To check the results of the settings made, open the **Preview** tab.

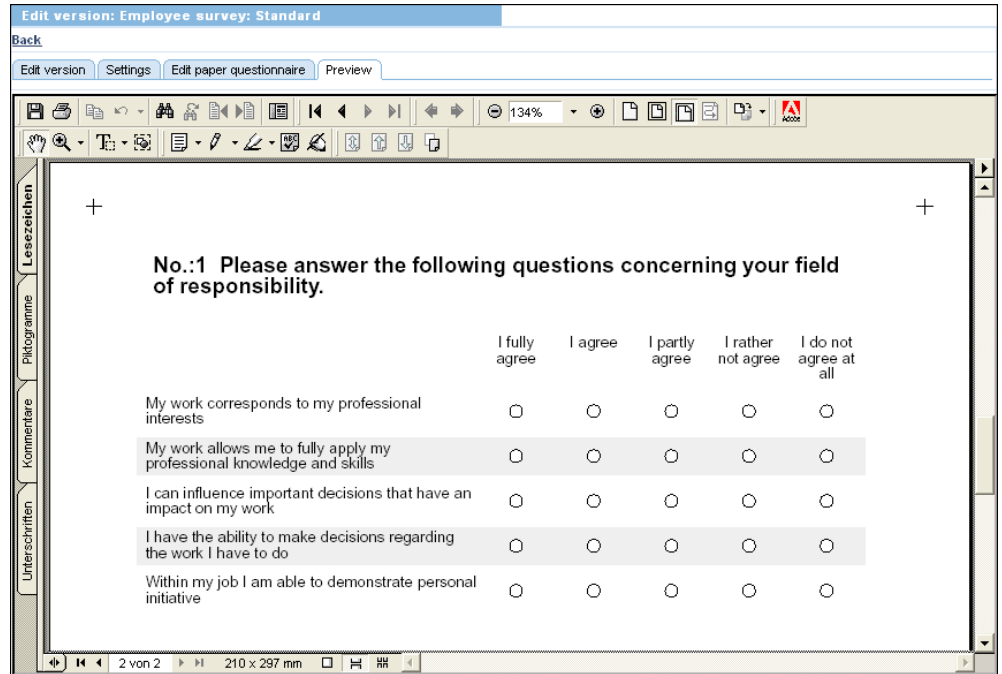


Figure 3.7 The PDF for the paper questionnaire in the preview

When designing a paper questionnaire, you have considerably less latitude than you might be used to in online questionnaires due to the predefined page size. Applying the following tricks might help:

- Page breaks: If the page breaks aren't positioned appropriately, go back to the Edit paper questionnaire tab and insert additional page breaks.
- Item or scale texts destroy the question layout: Use
 tags to enforce breaks where appropriate. E.g. in the questionnaire above a break is enforced after "agree not...".



For information on the layout of the paper questionnaire, please see Chapter 4, p. 17.

3.3 Creating Additional Versions of the Paper Questionnaire

To create an additional version of the paper questionnaire, proceed as follows:

1. Click the **Create new version** button.









| Create new version (Project "Employee survey") | | |
|--|---|---|
| Back | | |
| Edit version | | |
| Choose the questions for the selected questionnaire version. | | |
| Name | Sales Representatives | |
| pgid | Title | Offline  |
| 1547 | <input type="checkbox"/> Welcome |  |
| | Question Start Online Questionnaire (type 998) | <input type="checkbox"/> |
| | Question Start Offline Questionnaire (type 998) | <input checked="" type="checkbox"/> |
| 1548 | <input type="checkbox"/> Department |  |
| | Question Department (type 111) | <input checked="" type="checkbox"/> |
| 1549 | <input type="checkbox"/> Demographics |  |
| | Question Age (type 111) | <input checked="" type="checkbox"/> |
| 1550 | <input type="checkbox"/> Field of responsibility |  |
| | Question Field of responsibility (type 311) | <input checked="" type="checkbox"/> |
| 1551 | <input type="checkbox"/> Team |  |
| | Question Team (type 311) | <input checked="" type="checkbox"/> |
| 1552 | <input type="checkbox"/> Atmosphere |  |
| | Question Atmosphere (type 340) | <input type="checkbox"/> |
| 1553 | <input type="checkbox"/> Final page Final page (Status = 31) |  |
| | Question Final page (type 998) | <input checked="" type="checkbox"/> |
| <input type="button" value="Save"/> | | |

Figure 3.8 Naming a new version and selecting questions

2. Enter the name.
3. In the "Offline" column you can select the required questions.
4. Confirm by clicking **Save**. Now the tabs which are necessary for further editing of the new version will be displayed.

4 Editing Layouts

To edit the layout of a paper questionnaire version, open the **Paper questionnaires** menu, select the version and open the **Edit layout** menu.

The **Template management** tab offers a variety of design options, on the **Preview** tab you can check the effects of the changes made.

Figure 4.1 Editing the layout



If you create several versions of the paper questionnaire, it is necessary to define the layout for each version.

4.1 Defining Margins for the Questionnaire

In this section you can configure the width of the margins for the paper questionnaire. The unit for the entries is millimeters.

4.2 Formatting Text

In this section the format of various text elements can be changed for the whole paper questionnaire.

- Font, style and size for questions, fill-in instructions, item texts and leap commands can be defined.
- The background color of the answer elements can alternate. To activate this layout feature, activate the corresponding checkbox.

4.3 Using Default Pages

The layout of the paper questionnaire is created with templates containing default pages. Default pages are sample pages in PDF format which contain the required background, frame, header and footer of the paper questionnaire.

Three default page types are available:

- Cover page: Inserted at the head of the paper questionnaire.
- Standard page: The paper questionnaire is underlaid with the standard page.
- Final page: Inserted at the end of the paper questionnaire.

Each paper questionnaire version can have only one layout template, which contains one default page of each of these three types.

To create a default page, you can use e.g. MS Word and then generate a PDF file.

Importing new template with default pages

1. Create the default page(s) required for a paper questionnaire in PDF format.
2. On the **Template management** tab in the “Import new template with default pages” section, select the appropriate source files for the required page types on your PC.
3. Enter a name for the template.

| Import new template with default pages | |
|--|---|
| Cover page (in PDF format) | C:\cover1.pdf <input type="button" value="Browse..."/> |
| Standard page (in PDF format) | <input type="text"/> <input type="button" value="Browse..."/> |
| Final page(s) | <input type="text"/> <input type="button" value="Browse..."/> |
| Template name | cover1 <input type="button" value="Save"/> |

Figure 4.2 Importing template

4. Confirm with **Save**.

The template is uploaded and can now be selected in the “Choose template with default pages” section.

Selecting a template

1. In the “Choose template with default pages” section, choose the template required.

| Choose template with default pages | | |
|------------------------------------|----------------------|---------|
| Active | Template name | Actions |
| <input checked="" type="radio"/> | cover1 | |
| <input type="radio"/> | Don't use a template | |

| Import new template with default pages | |
|--|---|
| Cover page (in PDF format) | <input type="text"/> <input type="button" value="Browse..."/> |
| Standard page (in PDF format) | <input type="text"/> <input type="button" value="Browse..."/> |
| Final page(s) | <input type="text"/> <input type="button" value="Browse..."/> |
| Template name | <input type="text"/> |

Figure 4.3 Selecting template

2. Confirm by clicking **Save**.

5 Creating and Downloading PDF File

To generate and download the PDF file which contains the paper questionnaire, navigate to the **Paper questionnaires**->**{Selected version}**->**Export scan files** menu. After download, you can print and copy the paper questionnaire.

Additionally, this menu allows to create the form definition files which are used in combination with the Forms interface. For details on these files and the interface please see the Appendix, Chapter 6, p. 21.



If you create several versions of the questionnaire, these files must be created for each single version.

If you do not intend to use the Forms interface, but only want to download the PDF, proceed as follows:

1. In the **Paper questionnaires**->**{Selected version}**->**Export scan files** menu, activate the checkbox “Create PDF file”.
2. Confirm by clicking **Export**.
3. Save the file to your computer.
4. Now you can open the PDF, copy it and send it to the participants of the survey.



If you need not only the PDF; but the form definition files as well, please follow instructions in Chapter 6, p. 21 instead.

6 Appendix: Using the Readsoft-Forms Interface

If the results of the offline survey are to be collected inside EFS Survey, it is necessary to either manually enter them or scan and import the paper questionnaire data. For scanning and importing, an interface to the software *Forms* by *Readsoft* is available at the moment. Use of this interface offers the following advantages:

- It is not necessary to define the questionnaire anew in the scanning software: EFS Survey passes the information which EFS Survey variable has been collected at which position on the print-out to Forms.
- During the scanning of the completed paper questionnaires, basic validity checks will be performed automatically. E.g. the software checks if in a single response list, only one option has been checked. The checks exported from EFS Survey can be fine-tuned via the menus of the Forms software.

Before you start

Please note:

- Forms is a product of Readsoft's, i.e. an external manufacturer. Globalpark provides only the interface.
- The combination of software and scanner is of high importance for automated scanning processes. Check the functionality of scanner, scan software and interface combined beforehand.



If you have questions about the scan software Forms and its compatibility with various types of scanners, please contact the manufacturer directly.

Additional steps when using Forms

The following additional steps are required:

- Exporting the form definition files
- Scanning result data
- Importing scan files

6.1 Exporting the Form Definition Files

The form definition files are used to transfer the EFS Survey configuration of the paper questionnaire to the scan software. If you use Readsoft Forms the following form definition files will be created:

- filename.TAB
- filename.pagenumber.TRS: Such a file is created for each page of the questionnaire.



If you create several versions of the questionnaire, these files must be created for each single version.

To generate and export the form definition files, navigate to the **Paper questionnaires** ->{**Selected version**}->**Export scan files** menu where you also generate the PDF for printout.

Proceed as follows:

1. Define which program will be used for the scanning process. Select the appropriate export format, enter the path that points to the program on your PC, and define the name for the form definition files.
2. Decide which scan files are to be created. The PDF file and the form definition file can be selected.
3. Confirm by clicking **Export**.
4. The files are created and compiled in a ZIP file. Save them to your computer. If you use Readsoft Forms, a folder \uc_import\ will be automatically created in the folder EHFORMS. Unpack the ZIP file into this folder.
5. Now you can open the PDF for the paper questionnaire, reproduce it and send it to the participants of the survey. The form definition file will be used in the next step.



If you intend to use the import interface for Forms, please note: Once the PDF and the form definition files have been created, you should under no circumstances go back to previous steps and make changes. Otherwise it won't be possible to import the results of the questionnaire.

6.2 Scanning Result Data

Configure the scan program according to the instructions of the manufacturer. Use a blank print of the paper questionnaire as definition questionnaire. Then, scan the completed questionnaires.



If you use several versions of the paper questionnaire, it is necessary to repeat the configuration process for each version.

6.3 Importing Scan Files

Import the scan files according to the instructions of the manufacturer into EFS Survey.

You can find the upload feature in the **Paper questionnaires**->{**Selected version**}->**Import scan files** menu.

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