Creating Questionnaires with the VividForms Editor v6.1
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1. Introduction

This manual explains how to best use the VividForms Editor to create forms for the automated processing of survey results with Class Climate.

In the following chapters the possibilities in creating and editing questionnaires are explained. The individual elements of the questionnaire will be introduced. A further chapter will deal with filter rules, plausibility checks and required questions in surveys. Further functions such as the question library, the write-protect mode and template editing will round off your knowledge of the VividForms Editor.

Notes on the administration of questionnaires and the "Advanced Settings" of a questionnaire can be taken from the "Class Climate User Guide".

1.1. Before starting

Here is some basic information on working with the VividForms Editor.

About the VividForms Editor

The VividForms Editor is a browser and web based software solution for creating questionnaires. It can be started and run directly in the interface of your survey tool.

Figure 1: VividForms Editor

The header of the window shows the menu bar of the questionnaire. Via “Help” you can open the manual at hand. Via the menu on the left elements can be added to the questionnaire or can be edited. On the right side the work sheet is displayed. The center bar (see arrow) allows you to reduce or enlarge the menu and worksheet by pressing the left mouse button and shifting the mouse.
Saving
The VividForms Editor saves and updates the questionnaire on each change. Additional saving is not necessary.

Barrier Free Questionnaires
Special assistance is included in screen output for participants in online surveys. Such content can be recognized by so-called screen readers, enabling a better understanding of the content using voice output. This also allows people with disabilities to participate in online surveys more comfortably. An essential requirement for accessibility to an online survey in accordance with WCAG 2.0 level AA is that the questionnaire is prepared accordingly.

Please note the following:

- Graphics require alternative speaking texts
- Arrange extended pole labels over each column of scaled questions
- Use sans serif fonts (no Times New Roman)
- No italics or underlining
- Free texts left aligned
- No abbreviations i.e. for abstention (no ABST)
- Positive and active wording
- Avoid foreign words

The online template is the second important requirement for barrier free online surveys. The default template fulfills all necessary requirements.
2. Creating Questionnaires with VividForms

2.1. Define Form Information

After starting the Editor a form creation wizard opens. Some fundamental information regarding the questionnaire must be deposited here:

- **Short Name**
  A five to ten digit short name, which may only exist once in the system. It must not contain any spaces.

- **Heading**
  A longer text describing the questionnaire. This appears in the header of the questionnaire.

- **Paper**
  Choose between the paper formats A4, letter and legal. Attention! It is necessary to scan in the choosen format.

Click on [Apply]. Now the questionnaire is created. It contains a header and the editing bar can be used.
The preview mode, which can be activated in the lower part of the window, should only be switched on if the questionnaire is to be made available to active users (instructors) as a template or for the purpose of instructor’s optional questions. As a rule, it should first be activated after completing the sheets.

- **Template**
  
  Once you place a tick in the area “Activate/deactivate template mode”, you have defined your questionnaire as a template.

  With a questionnaire that is defined as a template, you can decide whether the new items should only be added at the end of the questionnaire. By doing so, you can ensure that the existing structure of your questionnaire cannot be changed. To do this, activate the option “New items may only be added at the end”.

**Note:**

Please only enable the template mode once the questionnaire has been created, otherwise corrective editing is no longer possible.

- **Max Pages**
  
  Defines the maximum number of pages this form can have when being used as a template by other users. If the property “Template” is inactive, the number of pages will be limited internally to 99 pages.

- **Max Items**
  
  Defines the maximum number of questions allowed on the questionnaire. This enables control over the number of questions which may be added when active users take this template to add personal questions. This limitation is inactive when the form is not a template.
2.2. The Editor Control

You can access all functions pertaining to questionnaire creation in the menu panel on the left. By clicking on a menu name, it can be opened and closed. Items which are grayed out in the menu are not available for the current form or cannot be used with the current selection.

The following menus and submenus are available:

![Editor Control Menu](image)

**Add**
- **Question group**: Opens the dialog to create a new question group
- **Question**: Opens the dialog to create a new question
- **Pole Labels**: Adds the pole labels defined under form properties
- **Extended Pole Labels**: Opens the dialog to add vertical pole labels
- **Line Space**: Adds an empty line
- **Separator**: Adds a horizontal separator
- **Text Box**: Opens the dialog to create a text box
- **Picture**: Opens the dialog to add a picture from the library
- **Page Break**: Adds a page break
Creating Questionnaires with VividForms

Figure 4: Editor Control - Add

- **Edit Question Group**: Opens the properties dialog of the selected question group
- **Edit Question**: Opens the properties dialog of the selected question
- **Edit Pole Labels**: Opens the properties dialog of the pole labels
- **Extended Pole Labels**: Opens the properties dialog of the vertical pole labels
- **Edit Text Box**: Opens the properties dialog of the selected text box
- **Picture**: Opens the properties dialog of the marked picture

Figure 5: Editor Control - Edit
Creating Questionnaires with VividForms

Clipboard
- **Undo (Ctrl + Z):** Undoes the last action (up to 20 in a row)
- **Cut (Ctrl + X):** Cuts the selected object and adds it to the clipboard
- **Copy (Ctrl + C):** Copies the selected object and adds it to the clipboard
- **Paste (Ctrl + V):** Adds the contents of the clipboard below the marked object
- **Delete (Del):** Deletes the marked object

![Clipboard Image](image)

Figure 6: Editor Control - Clipboard

Move
- **Up:** Moves the marked object one step up
- **Down:** Moves the marked object one step down

![Move Image](image)

Figure 7: Editor Control - Move
Form Properties - Paper View

- **Form properties**: Opens the properties of the questionnaire
- **Layout settings**: Opens the layout settings for the form
- **Repair form**: Recreates the questionnaire
- **Enable numbering**: Toggles the numbering of questions and question groups
- **Edit Pole Template**: Opens the dialog for the definition of pole labels
- **Filter settings**: Opens the dialog for the filter settings
- **Validation, Required questions, Cross tabulations**: Opens the dialog for validation, required questions, cross tabulations
- **Change color scheme**: Opens the dialog for adapting the form’s color scheme
- **Picture Library**: Opens the dialog for adding and removing pictures to/from the picture library
- **Line Height, Font Size, Size of the answer boxes, Font**: Selection of line height, size of answer boxes, font size and type for the complete questionnaire

Figure 8: Editor Control - Form Properties - Paper View
Form Properties - Online View

- **Form properties**: Opens the properties of the questionnaire
- **Repair form**: Recreates the questionnaire
- **Enable numbering**: Toggles the numbering of questions and question groups
- **Edit Pole Template**: Opens the dialog for the definition of pole labels
- **Filter settings**: Opens the dialog for the filter settings
- **Validation, Required questions, Cross tabulations**: Opens the dialog for the validation, required questions, cross tabulations
- **Picture Library**: Opens the dialog for adding and removing pictures to/from the picture library
- **Online template**: Selection of the template used for the online view in the VividForms Editor
- **Display**: Selection of the display mode for the online view in the VividForms Editor

The layout settings and the color scheme cannot be edited in the online view. The online view is controlled by the online template.

![Form Properties](image)

*Figure 9: Editor Control - Form Properties - Online View*
Question Library

- **Choose a question from the library:** Opens the dialog to add questions or question groups to the library
- **Add selected question to library:** Opens the dialog to add a selected question to the library
- **Delete selected question from library:** Deletes the question from the library
- **Detach library question:** Detaches the selected question from the library
- **Add selected question group to library:** Adds the selected question group to the library
- **Delete selected question group from library:** Deletes the selected question group from the library
- **Detach library group:** Detaches the selected question group from the library

![Question Library](image)

Figure 10: Editor Control - Question Library

Form Information

- Template mode activated/deactivated
- Maximum number of pages
- Current page number
- Edit mode/Read only mode
- Paper format
- Numbering on/off
- Information on the active object
• Current number of questions on the sheet
• Maximum number of questions on the sheet
• PDF version and the Editor version of the form

Figure 11: Editor Control - Form Information

2.3. Viewing Options

Two different display options for displaying the questionnaire in the VividForms Editor are available: the paper view and the online view. With the help of an icon (PDF and globe with green arrow) in the viewing bar above the questionnaire, you can switch back and forth between views, as long as the system is licensed for both types of surveys. If the system is only licensed for paper or online surveys, it is not possible to switch the views. Only the licensed type of view is displayed.

Figure 12: Switching between Paper and Online View

In the system settings (menu “System Settings/Class Climate Settings/VividForms/Standard view VividForms Editor”) the (Subunit-)Administrator can define, which view is opening with the editor (paper or online view).

If, in the properties of a questionnaire, it is defined that this is only released for paper surveys, only the paper view is displayed when opening the sheets. If the sheets are only released for online surveys, only the online view is displayed. The button for switching is then no longer available.
2.3.1. Paper View

In the paper view, the display of the questionnaire is simulated as a paper survey.

![Paper View Page Break](image)

If the questionnaire you have created consists of more than one page, you can change to the different pages using the arrows, as well as the drop-down list in the upper right hand corner of the screen.

2.3.2. Online View

In this view, processing of the questionnaire takes place in a display that simulates an online survey. The following subsequent settings can be presented already on the questionnaire:

- **Online templates**

  If customized online templates were created on the basis of the Class Climate standard template, the online questionnaire can also be presented in the design of the customized template. To do this, select the desired template under “Online templates” in the form properties.

![Online View - Online Template](image)

- **Display**

  The display modes (complete, per question, per chapter - questiongroup and per page - page of the questionnaire) can be selected, which are also available for the real online survey. If, for example, the display mode “per page” was selected, tabs are then shown by which one can skip between the individual pages of an online questionnaire.
• Mobile Devices

Via the drop-down list in the viewing bar above the questionnaire, you can, where required, simulate the display of the online questionnaire for mobile devices. As well as the standard view, which is intended for screen viewing on PC’s, the view for small, medium and large mobile devices can also be selected.

Note:
The viewing options that can be set here only apply to presentation in the VividForms Editor. They are intended to facilitate the work with the editor, by displaying a true image of the online survey. For the real online survey, the representation (per chapter, per page etc.) is defined in the details of the questionnaire. The online template is defined in the subunit properties. The presentation of the online survey is automatically adapted to the resolution of mobile devices, when the support of mobile devices is enabled in the configuration (“System Settings/Class Climate Settings/Survey Online/Support for mobile devices”). By default it is enabled.

2.3.3. Preview Functions

Regardless of the type of view being used, at any point in time of the editing process, a preview PDF of the paper form or an online survey preview can be generated. Both preview options can be found in the View bar above the questionnaire. The relevant preview opens in a separate browser window.
Now you can assess whether further corrections to the properties of the items on the questionnaire are necessary for a satisfactory result.

The imprint "DRAFT" indicates that this sheet of paper is not yet assigned to survey, but only serves to control the layout. To continue processing the questionnaire, the preview can be closed.

Figure 18: PDF Preview of Questionnaire

Also when using the online preview there is a notice that the preview shown is not a fully-fledged online survey, but serves only visual purposes.

Figure 19: Preview of Online Survey
2.4. Editing the Questionnaire Header

By default, the form header contains two lines for describing the survey. This information can be entered manually or dynamically filled using placeholder text. If the form is to be used for various surveys, the use of placeholder text is recommended.

The essential placeholders are structural information such as: the name of the Subunit, the name of the course to be evaluated or the name of the Instructor.

In the following figure you can see the placeholders that the header area contains by default:

![Figure 20: Placeholders in a Questionnaire](image)

Click on a placeholder to edit its content.

**Note:**

Placeholders are only filled from the structure with the correct spelling, with continuous capital letters and brackets.

If necessary, the form header can be customized. Here, the placeholders can not only be edited but also supplemented by static text or deleted. Where long entry content of a placeholder is expected (i.e. [SURVEY]), it is sensible to extend this placeholder over two columns. Additionally, the number of lines in the form header can be changed in the placeholder wizard.

**Editing Placeholders**

The placeholder to be edited must be clicked on. In the input field of the placeholder wizard, the existing placeholder is marked for deletion and removed with "Del" on the keyboard. Now, static text, a placeholder, or a combination of both can be deposited in the input field.
A placeholder wizard will appear as shown here. You can insert different placeholders in the text fields provided. To do this, click on the buttons which symbolize the relevant content with small graphics.

Following placeholders are available:

- **[SUBUNIT]** Name of subunit
- **[ORGANIZATION]** Name of organization
- **[AUTHOR]** Name of instructor
- **[AUTHORS]** Name of instructor and secondary instructors/further report recipients (if existent)
- **[SURVEY]** Name of course or survey
- **[PERIOD]** Name of survey period
- **[COURSEID]** Course ID

In addition to these placeholders, two text elements can be used to fill the box containing hints on completion:

- **[MARK]** Filling instructions part 1
- **[CORRECTION]** Filling instructions part 2

The contents of the “Instructions for Completion” are system settings which are exchanged according to the language setting. The given content can be replaced with a text input.
Creating Questionnaires with VividForms

**Note:**
Empty space in the form header is displayed shown with (+) and can be clicked and edited.

**Editing Placeholders - (Subunit-)Administrators only**
Apart from the placeholders available as buttons, practically all other placeholders can be used which are available for use in text templates. Instead of the placeholders you can enter text directly. It then becomes a static text which is not adapted to the respective surveys.

- **[COURSENAME]** Course name
- **[COURSEROOM]** Course´s room/location
- **[CURRENTDATE]** Current date
- **[DIRECT_ONLINE_LINK]** Adds a link to the online survey that contains the server address as well as the PSWD/password. Simply clicking the link shows the online questionnaire.
- **[PROGRAMOFSTUDY]** Course’s program of studies
- **[QUESTIONARY]** Name of the questionnaire
- **[SEC_FIRSTNAME_X]** First name of secondary instructor (X must be an integer)
- **[SEC_SURNAME_X]** Surname of secondary instructor (X must be an integer)
- **[SEC_TITLE_X]** Title of secondary instructor (X must be an integer)
- **[SERVER]** URL for online survey participants (e.g. http://cc.example.com/classclimate/online/)
- **[TAN]** A PSWD for online survey participants (e.g. X5FU3)

**Example:**
Using the cover sheet procedure the header of the questionnaire remains empty because it cannot be adapted to a single particular survey. If you only want use a questionnaire in the cover sheet procedure, you can avoid this issue by inserting static texts into the header instead of the placeholders.
If the questionnaire is to be used for non-anonymous surveys personalized to individual participants, other placeholders can be added. For this simply select a placeholder from the shortlist in the lower area of the dialogue and click on the button marked [+].

**Note:**
The fields for survey participants can only then be used in a survey when participant data for the respective course identification was imported into the Class Climate system via the relevant CSV import.

The following placeholders are available for non-anonymous surveys:

- **[PARTICIPANT_FIRSTNAME]** Survey participant’s first name
- **[PARTICIPANT_LASTNAME]** Survey participant’s last name
- **[PARTICIPANT_IDENTIFIER]** Survey participant’s ID
- **[PARTICIPANT_SALUTATION]** Survey participant’s salutation
- **[PARTICIPANT_TITLE]** Survey participant’s title
- **[PARTICIPANT_ADDRESS]** Survey participant’s address
- **[PARTICIPANT_EMAIL]** Survey participant’s email address
- **[PARTICIPANT_CUSTOM1]** Survey participant’s first user-defined field
- **[PARTICIPANT_CUSTOM2]** Survey participant’s second user-defined field
- **[PARTICIPANT_CUSTOM3]** Survey participant’s third user-defined field

**Hint:**
If multiple placeholders are used in succession, they should be enclosed in additional square brackets (i.e. [[SALUTATION] [TITLE] [SURNAME]]). In this way too much space being erroneously displayed can be avoided if a placeholder is not filled.

**Extend placeholder across two columns**
If a placeholder is to extend across two columns, click on the corresponding placeholder and activate the option “Placeholder across both columns”. Please observe, that Class Climate will automatically delete the placeholder in the other column and, where applicable, you will need to insert it in another area of the questionnaire header.
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Figure 22: Extend Placeholder across two Columns

Adjusting number of lines

Figure 23: Define the Number of Lines in the Questionnaire Header

In order to expand or contract the size of the questionnaire header, the number of lines made available can be adjusted in the placeholder wizard. You can choose between 1 and a maximum of 10 lines. The more lines included in the form header equates to more room being available for the logo.
Adjusting the logo

The logo in the questionnaire header can also be replaced by your own logo. By default, the logo defined as the standard subunit logo is displayed. To integrate a custom logo into the questionnaire header, click on the existing logo. The logo assistant opens automatically.

Figure 24: Adjusting the Logo

Here you can choose whether to

- use the standard logo (subunit logo) or
- use QR code for hybrid surveys or
- use your own logo.

Under “Use own logo” you will find the logos and pictures which you have already uploaded into the “Picture Library” in the menu “Form Properties” in the Editor Control. If you have not yet integrated any pictures (e.g. logos) into the “Picture Library”, you cannot select your own logo. To upload images to the library please see chapter 2.9.3. „Upload Pictures to the Picture Library“.

In the area “Position in questionnaire header” it can be determined whether the selected logo should be displayed on the left or right side of the questionnaire header. Furthermore, in the “Vertical Alignment”, the orientation of the logo in the questionnaire header (top, middle, bottom) can be defined.
In the area “Scale of the box width in%”, the size of the logo can be adjusted. At a size of 100%, the logo can occupy the entire outer third of the questionnaire header. If the percentage is decreased, the logo is scaled down accordingly.

The following illustrations give an example of a questionnaire header expanded to three lines with adjusted placeholders and custom logo in the editor view as well as in a PDF:

![Figure 25: Adjusted Form Header (Editor View)](image)

![Figure 26: Adjusted Form Header (PDF)](image)

Alternatively for hybrid surveys, a QR code can be integrated into the questionnaires. Participants with mobile devices then have the opportunity to scan the QR code from the questionnaire header and to complete the questionnaire as an online form. The QR code displayed in the editor preview and QR code on the sample questionnaire is just a placeholder. When creating a hybrid survey, it will be replaced with an individual QR code including a built in PSWD number and appear on each questionnaire.

**Note:**
Only use QR Codes in questionnaires which are used solely for hybrid surveys. Also, always use the placeholder [PSWD] and [SERVER], to allow online access to participants without mobile devices.
2.5. Using text fields

In the VividForms Editor there are numerous possibilities for adding text, for example in question groups, questions and free texts. In most cases it is possible to format text and create links in text fields. In addition, copying text from external sources in the simplest manner is provided for.

Formatting Possibilities

Besides the usual formatting options B (bold), I (italic) and U (underline), marked characters can also be set in superscript or subscript. In addition, characters can be assigned a font color. This font color overrides the central settings.

Formatting may be reset when the identical area is marked and the formatting function is deactivated again.

![Figure 27: Formatting in Text Fields](image)

Inserting Links

A Link comprises a URL and a description. The description can be the marked text of the text field or be entered when creating the link. The URL (link address) must be deposited as http://www.example.com. Links will open in a new window or a new tab, depending on your browser. Links always have the default color of the browser.

If the link is marked, it can be deactivated with the grayed out icon "Remove link" at the bottom of the screen.

![Figure 28: Links in Text Fields](image)

Back and Forward

Entries in the text field can be corrected with 'go back' up until [apply]. The grayed out arrow to the right at the bottom undoes previous corrections.

![Figure 29: Back and Forward in Text Fields](image)
Inserting Text

Text prepared in word processing programs are often created with non-visible formatting information. So that this additional information is not transferred to the new location, the copied text is first displayed in a special window. Either the “Insert” option is used directly or the window opens when using mouse or keyboard commands.

The text is inserted after visual inspection or the process is cancelled. Once added, the form adopts the default font.

![Figure 30: Pasting Text into Text fields](image)

HTML-Tags

For editing of HTML Tags the (Subunit-)Administrator has to activate the function “System Settings/Class Climate Settings/VividForms/Allow editing of HTML code in the Vivid-Forms Editor”.

![Figure 31: HTML-Tags in Text Fields](image)

Please note, that all modification can cause to different results in the Editor view as well as in the Paper or Online surveys.

Changes in the HTML source is not recommended. The default of the function is “deactivated”.

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2.6. Adding and Editing Question Groups

Question groups unite questions that are thematically similar under a general heading, so that, for example, indicators can be calculated.

Adding Question Groups

Question groups can be placed on the form below the active question group via the Editor Control/Add.

![Figure 32: Create a Question Group](image)

Text entries have the following meaning:

**Title**

Title of the question group

The title of the question group is displayed on the form and can be formatted (see chapter 2.5. "Using text fields").

**Presentation Slide Text**

This text appears on the presentation slide in the PDF report in order to explain an indicator.

**Please note:** This option is only available when the creation of a presentation template is activated in the PDF report settings ("System Settings/Report Settings/Configuration").
Indicator

Indicators are the mean values of all returns within one question group. To calculate this, the values of the scaled questions must be uniform. Here you can select which values numbers are to be combined into a number average.

Select a scale for the questions that are to be combined to an average.

![Indicator Selection of a Question Group](image)

Figure 33: Indicator Selection of a Question Group

Highlighting Question Groups

The possibility of highlighting the question groups is activated in the menu “Form Properties” (see chapter 2.10. "Form Properties").

Font Size

Select the font size for the heading text from 7pt up to 20pt.

Note:

The maximum font size of the question group depends on the size of the line height defined for the questionnaire. Thus, to set a bigger font size for the question group it can be necessary to first enlarge the line height in the menu “Form Properties”.

Text Element

If you check this box then the question group will be changed into a text element. When changed into a text element, the question group loses its original function and becomes mere text. You can no longer add items such as questions or design elements to this redefined group.

Having made your settings and clicking on “Apply”, the chapter title will appear in the preview.
**Editing question groups**

If the question group in the preview is already active (bold and highlighted with background color) a click is enough to edit the question group using the wizard. Otherwise the wizard opens with a double click on the question group. Editing an existing question group is also possible using the "Editor Control/Editing/Question Group". The question group which is active or contains an active element can then be processed.

Moving active question groups with all the questions is undertaken in the "Editor Control/Move/Up or Down".

An active question group is removed via "Del" on the keyboard. The questions contained in this group are also deleted. Alternatively, the "Delete" option in the "Editor Control/Editing" can be used.

In the "Editor Control/Edit" the options "Cut", "Copy" and "Paste" are also available. These features work on the entire active question group and can be executed with the usual keyboard commands.

### 2.7. Adding and Editing Questions

Questions are always assigned to question groups and each is added behind the active element in the preview.

**Adding Questions**

Should you wish to add a question to your questionnaire, choose the option “Add question” in the Editor Control.

Questions can also be placed on the form via "Copy" and "Paste" in the “Editor Control/Edit” or via the keyboard. It is always important to note which element is active (Focus: on).

**Moving Questions**

In a question group, single questions can be moved up or down by using either the arrow symbols and in the menu “Move”, or by ‘drag and drop’. With Drag and Drop, the left mouse button is clicked on the question. With the left mouse button held pressed, the question is dragged to the required position and the button released. The question must always be placed or ‘dropped’ on an element. If the question is dropped in the upper half of the element, it is inserted above it, or in the lower half of the element, then below.
Creating Questionnaires with VividForms

If questions are to be moved to another page of the form, use the options “Cut”, and “Paste” in the menu “Edit” or the equivalent keyboard commands.

2.7.1. Question Wizard

The question wizard assists in inserting questions into the questionnaire. In the first step the question type is selected. If you move the mouse over the info icon on the right side, a preview of the question type shows up. Then the settings of each respective question can be undertaken.

The following chapters discuss each of the question types, also with a view to evaluation.
2.7.2. **Scaled Questions**

Scaled questions are questions about the quality. Scaled questions can be grouped and averaged to indicators. Scaled questions are also available for generating cross tabulations. Linear scales have up to 11 options. When needed a no opinion field can be added. Scaled questions can be labelled with individuale pole labels, pole templates or extended pole labels.

![Figure 36: Analysis of Scaled Questions](image)

**Add a scaled question**

Select the question type scaled question and click on [Next].

![Figure 37: Question Wizard Scaled Question](image)
Display a Scaled Question

In the upper input field the question text is entered. The number of values is defined via the selection list. You have the choice of between two and eleven fields. Below this, an abstention can be activated. The preview next to the checkboxes is refreshed according to the settings.

The pole labels and the optional abstention text can be defined individually after enabling the checkbox “Individualize pole labels”. Otherwise these labels remain empty or will be defined by the horizontal or vertical pole labels which can be generated separately.

Figure 38: Individualized Pole Labels

Hint:

Some of the most common pole labels are “Strongly Disagree” and “Strongly agree”. When using individualized pole labels, the text of these labels can break into two lines if the font size exceeds a certain size. If you want to avoid line breaks, please note the following: When using the paper format “letter”, the lines will not break if the font size does not exceed 10 in traditional layout and 8 in optimized layout. The font size and layout can be set in the menu “Form Properties”.

Section Report

A choice of diagram types to be used in the report is available at the bottom.

The VividForms Editor allows you to mirror individual scaled questions. Using this method, control questions can appear inverted in the survey but at the same time flow correctly into the calculation of the indicators.

On your questionnaire, you can establish mirrored scaled questions in two different ways:

1. by composing a question text in a negative way with the pole labels being consistent throughout the questionnaire, e.g. “The technical equipment is poor” with the pole labels “strongly agree” (left) and “strongly disagree” (right).

2. by inverting the pole labels for a question while the phrasing of the question remains positive, e.g. “The technical equipment is excellent” with the pole labels “strongly disagree” (left) and “strongly agree” (right). This method is only apt for scaled questions with individual pole labels.

To create a mirrored scaled question, click on the option “Set this scaled question as a mirrored question” whilst you are creating the scaled question. In the VividForms Editor preview, the scaled question is marked with a red arrow.
Section Settings

In this section, the subsequent editing of scaled questions is made easier or individual scaled questions can be combined to make double scales.

![Settings](image)

**Figure 39: Question Wizard Scaled Questions - Settings**

**Use these settings as default for scaled questions**

If you would like to apply the settings of the created scaled question (abstention, check boxes, pole texts, chart type, etc.) for all further scaled questions, activate the option, “Use these settings as default for scaled questions”. All scaled questions that you add afterwards, receive these settings per default.

**Dual Scale**

The combination of quality and importance (dual scale) is a frequently encountered question type. The purpose of the combination is to separate the important cases from the unimportant ones. Bad and unimportant as well as good and unimportant cases should be disregarded as negligible. The dual scale is helpful, in that it separates the relevant and irrelevant areas of a survey, therefore aiding target-oriented decision making. It is also a useful function for testing new items.

**Note:**

To use the dual scale, insert your scaled questions with individual pole labels as you are used to in the VividForms Editor. Please note the following:

- Scaled questions which are to be later linked to each other, need to have an identical scale (for example, both questions have a 6 point scale).
- The scale has to comprise 4-6 checkboxes (no longer/shorter scales possible).
- The quality rating of the poles must also be consistent with each other. This means that in quality questions, if the left pole is the positive one (very good/agree), then in importance questions, the left pole has to be the positive one too (very important).
- The dual scale is only expedient if you have stored individual pole labels for each scaled question.
In the following example, a scaled question was first inserted on the quality of the technical equipment. Then, a second scaled question was inserted on the importance of the technical equipment. By activating the option “Combine to dual scale with previous question”, both of these scaled questions are linked to each other.

Figure 40: Question Wizard Scaled Question - Dual Scale

In the VividForms Editor, the activation of the dual scale, that is, the linking of a quality to an importance scaled question, is marked by a yellow bracket:

Figure 41: The marking of Scaled Questions (Dual Scale)

Notes:
Moving, cutting out or deleting the scaled questions cancels the link.

Display in the PDF Report

In the menu “System Settings/Report Settings” you can change the configuration settings for every PDF report by clicking on the icon in the column “Configuration”. With the configuration setting “Dual scale profile line” you can activate the display of the dual scale in the PDF report.

By selecting “0” the display of the dual scale is deactivated. By selecting “1” you define that the critical values appear on the left side of the scale, with “2”, the critical values appear on the right side of the scale.

The critical values are calculated by subtracting the result of the quality question (a) from the result of the importance question (b). On a 6 point scale, the values range between -5 and +5. Values of +1 to +5 are considered critical as soon as the positive pole (agree/very important) in the questionnaire, appears on the left side. Values from -1 to -5 are considered critical as soon as the positive pole (agree/very important) in the questionnaire appears, on the right side.
Apply settings to all other scaled questions

You can, if required, apply the settings for a scaled question to all the scaled questions already available on the questionnaire.

For this, activate the option “Apply settings to all other scaled questions” and click on the button [Define settings]. A window will then open, where you can determine which settings should be applied, and define if the selected settings should be applied for the complete questionnaire, or just for the current question group.
To apply the settings, close each of the opened windows with the button [Apply]. The Question Wizard closed.

**Preview the settings on the form**

This example shows scaled questions, scaled questions linked to a double scale and a mirrored scaled question.

**2.7.3. Adding Pole Labels**

Beyond the individual pole labels, scaled questions can also be provided with horizontal or extended pole labels. These supplements to a scaled question are not assigned to a single question but are inserted via the Editor Control.

**Horizontal Pole Labels**

This function allows for the definition of pole label headers for scaled questions.

This is useful if the pole labels for question groups are repeated. Pole labels are, as are questions, independent elements on the form, which can also be subsequently created or moved.
Firstly select the option “Edit pole template” into the section “Form Properties” and describe the left and the right pole.

![Edit Pole Template](image1)

Figure 46: Edit Pole Template

Enter the text elements which should be used for the labels and click [Apply].

In the next step, the horizontal pole labels (Pole templates) are displayed on the form under the active element via the "Editor Control/Add" and the option “Pole Labels”.

![Pole Labels in the Editor View](image2)

Figure 47: Pole labels in the Editor View

Continue adding scaled questions. Do not define individual pole labels since the pole label headers perform this function. The pole labels are automatically assigned to all scaled questions below. This allows them to be displayed in the PDF reports.

![Pole Labels in the PDF Preview](image3)

Figure 48: Pole Labels in the PDF Preview
Extended Pole Labels

Extended pole labels can be defined as an alternative to horizontal labels. In this case, each value of the scale is described. This option is essential for barrier free online surveys.

Extended pole labels are, as are questions, independent elements on the form, which can also be subsequently created or moved.

The extended pole labels are edited in the "Editor Control/Add". Now the individual descriptions of the values must be entered in the input field "Option" and adopted with a [+]. The description on the left is added first. Each text element is limited to 25 characters.

To edit an option, it must be selected with a left mouse click, then the functions “Move up”, “Edit”, “Delete” and “Move down” are available via the icons on the right. With “Edit”, the option in the input field is reset, corrected and with [-] adopted back into the options list.

The description for abstention is, where necessary, entered into the relevant text field.

Figure 49: Enter and Edit of the Vertical Pole Labels

The degree of inclination indicates the orientation which the extended pole labels should have on the form. The degree value refers to an anticlockwise angle starting in the horizontal position (=0°).

Inclination refers only to presentation on paper. In online surveys extended pole labels are by default displayed horizontally.
The display mode 0° (i.e. horizontal) for paper surveys is mainly designed to allow scale labeling with short texts such as numbers (see below, 1st example). You can also use longer texts, but please be aware that the font size of these texts will be automatically reduced (see below, 2nd example). If you wish to use longer texts, please check the layout in the paper preview. Depending on the length of the scale and the length of the pole labels the texts could be cut off.

Note:
In the preview of the VividForms Editor, the pole labels are always in a vertical position. To get a preview of the inclination, please call up the PDF preview.
The texts for the respective left and right poles are automatically applied to each of the questions following. In the PDF report, as in the exports, only these pole labels appear. With “Apply”, the extended pole labels are added to the questionnaire.

Example:

The inclination and the length of the pole labels influence the space used on the sheet of paper. The following graphic shows you the online preview and the preview in the VividForms Editor, which is identical for levels of inclination:

![Figure 52: Inclined Pole Labels in the Online Preview](image)

![Figure 53: Inclined Pole Labels in the Preview of the VividForms Editor (Independent of the Degree of Inclination)](image)

![Figure 54: Inclined Pole Labels (45°) in the PDF Preview](image)
2.7.4. Open Questions

The open questions provide the opportunity for a qualitative feedback. Responses to open questions are automatically recognized as answered during processing and are integrated in the report document as image files. If the responses have been manually anonymized or are part of an online survey then the responses are in machine print and can be exported together with the raw data.

Figure 57 (a): Illustration of a Result of an Open Question as Image File as well as (b) in Machine Print Form
Adding Open Questions

With the selection of the open question by [Next] the question wizard opens. Here, under the question text, the size of the writing fields and, in online forms, character limitation can be set.

![Figure 58: Question Wizard Open Question](image)

**Available Space**

It shows how much lines are on the form page up to date. The open question is to include more lines than are available, the question on the next page will be inserted.

**Size**

Here choose the size of the comment box depending on the number of lines needed. Any number of lines up to the whole remaining page area may be selected.

**Settings**

The maximum number of characters allowed for the answer can also be defined for online surveys. It is advisable to define a maximum number of characters to be entered for online surveys. „0“ means without restriction.
After having defined all options click on [Apply]. The open question will now appear in the preview and will be automatically highlighted.

![Open Question in the Editor Preview](image)

**2.7.5. ICR Question (Handwriting Recognition)**

With the help of ICR questions and the ICR license, handwritten entries of participants can be automatically read and recognized. Participants make their entries in block letters or numbers in one-line handwriting fields or segmented fields. In the PDF report, these ICR questions can be evaluated as open questions (in this case, all recognized entries are vertically listed) or as closed questions presented using bar charts. If no ICR license is installed, the handwritten entries in ICR segments will be displayed in the same way as open questions in the report.

![Presenting Results of an ICR Question with Bar Chart (As a Closed Question)](image)

With the help of ICR questions, dates (such as date of birth, date of ex-matriculation etc.), names (first name, last name), customer number etc. can be captured.

**Note:**
Please note that the use of segmented fields, the automatic recognition rate of entries is much higher!

If you are interested in the ICR-AddOn, please contact our vendor.

**Adding ICR-Question**

With the selection of the ICR question by [Next] the question wizard opens. Here, under the question text, the settings for the segmentation of the writing fields can be made. In online surveys, ICR questions are displayed as open questions.
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Figure 61: Question Wizard ICR Question

**Settings for Segmented ICR Questions**

For the segmented presentation of the ICR question, a number of settings are available. In addition to the language, the format of the segmented fields is predefined. From the drop down menu, predefined formats such as dates (e.g. NN"/"NN"/"NNNN) can be selected as well as your own new formats, such as for customer numbers, etc. can be stored.

The following options are available for own formats:

- N for numerical entries
- L for alphabetical entries
- A for alphanumerical entries as well as special characters.

To define your own format, delete the default format in the input field and enter your new format using the keyboard or by clicking the buttons [N], [L] and [A]. Please note that if you use any separating characters you have to set them in inverted commas (eg "/"), otherwise, they will not be recognized as such by Class Climate.
With a click on the buttons [N], [L], [A] the segment types are applied in the input field. Separators or complimenting text must always be set in quotation marks (i.e.: "/").

**Hint:**
Internal tests during quality assurance have shown that the average recognition rate for numerical values is the highest; around 99% of values are correctly recognized. For the alphabetical values, the recognition rate is also very high, lying at around 90%. Because of the elaborate character set, recording alpha-numerical values has the lowest recognition rate, with around 74%.

For this reason, to achieve the greatest possible reading reliability, assign the individual segments numerical or alphabetical character formats if you can. This significantly reduces the complexity of the subsequent verification.

Also, for segmentation different styles can be selected: the fields can be presented closed at the top, top open or half open. The selected segmentation is shown not only on paper questionnaires, but in the online survey too.

In addition to segmentation, the presentation of an ICR question in the PDF report can be specified. Here there are the following options:

- Like an open question: In this case, the results are displayed individually one below the other, analogous to the results of an open question. Identical entries are concentrated and have “mentions” added to the corresponding number (for example: 21337 (2 mentions).

![Figure 62: ICR Question: Display like an open question](image)

- Bar for every mention: The results are analyzed using bar charts, with each answer option receiving its own bar. Identical entries are concentrated. This option is recommended for double-digit numbers at maximum.

![Figure 63: ICR Question: Display with bars for every mention](image)
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- Bar for mentions across 10 groups: The results are analyzed in a bar chart. The group number relates to the number of bars (here 10) that should be displayed later in the PDF report as the analysis of this question. In this way, numerical queries in the value range 0-999 (format: “NNN”) are divided into the following 10 groups: 0-99; 100-199; 200-299; ... ; 900-999.

**Note:**
Please note that the options “bar for every mention” and “bar for mentions across 10 groups” are only available for segmented numerical ICR questions.

Each segmented ICR question can also be individually defined as to when it should be displayed in the verification. The following settings are available in Class Climate:

- **Always:** The question is always displayed in the verification, regardless of the Reader's reading reliability. This option should be used when the unread characters should be captured exactly.

- **From low to high reading reliability:** The question is very likely to appear in the verification. Only when all entries of the ICR question have been recognized with absolute certainty does it not appear in the verification.

- **From low to middle reading reliability:** Only ICR questions that the Reader has recognized with low to medium reading reliability are displayed in the verification.

- **Only when reading reliability is low:** Only ICR questions that the Reader has recognized with low reading reliability are displayed in the verification. All other questions (medium to high reading reliability) are not displayed in the verification. This option is suitable when the verification requirements should be as low as possible, and when, under certain circumstances, incorrectly read values can be accepted.

**Note:**
If you create a survey with a questionnaire which contains open questions with handwriting recognition, the “verification” is automatically activated. This can be deactivated if desired.

By clicking the button [Apply] the open question is inserted into the questionnaire.

**Figure 64: Open Question: Segmented Fields in the Editor Preview**
Settings for not segmented ICR Questions

In the not segmented presentation, a one-line handwriting field without subdivision is displayed. For recognition, the language (German/English) as well as the type of characters to be read are defined. Four character types are available:

- Alphabetical = letters only
- Alphanumeric = letters and numbers
- Numeric = numbers only
- Numeric+ = numbers and special characters: $ / * + , . < > = ~ @ € £ ¥ ¢ '

Figure 65: ICR Question: Choice of Character Types

Hinweis:
Not segmented fields have a much lower reading reliability!

By clicking the button [Apply] the open question is inserted into the questionnaire.

2.7.6. Single Choice (1 of n)

A single choice question has multiple answer options of which only one can be selected (e.g. age, gender, etc.).

Generally you can define as many answer options as necessary, as long as there is enough room left on the page. Nevertheless, there are differences within this question type resulting from the number of answer options provided:

For single choice questions with up to 11 answer options, the position of the options (next to/beneath the question text) can be freely defined. In the report all answer options will be displayed, regardless whether they have been marked on the questionnaires or not.

When a single choice question has more than 11 answer options, the options are always displayed beneath the question text. In the report only those options are displayed, which have at least been selected once by the participants.
Adding Single Choice Questions

With the selection of the single choice question by [Next] the question wizard opens. Here, under the question text, the answer options can be entered, their positioning as well as the online display of the question can be defined. Furthermore, a mean value can be calculated for the result report or an image integrated into the question.

Figure 67: Question Wizard Single Choice

The question text is entered in the upper input field. To apply formatting, the relevant section of text must be marked.
In the input field "Answer Options", each option is entered one at a time and adopted with [Add Option] into the list of answer options. To edit an option, it must be selected with a left mouse click, then the functions “Move up”, “Edit”, “Delete” and “Move down” are available via the icons on the right. With “Edit”, the option in the input field is reset, corrected and with [Update Option] adopted back into the options list.

For paper based surveys the alignment of answer options of single choice questions can either be set to “next to the question text” or “beneath the question text”. For questions with more than 11 answer options, only the option “beneath the question text” can be selected. The option “Default Questionnaire Layout” refers to the settings defined in the menu “Form Properties/Layout settings”. In online surveys, the answer options are, by default, displayed next to the question. On mobile devices with small displays, presentation of the question is matched to the output size.

Settings for the display in online surveys can be made for both single choice question types. You can choose between the drop-down list and checkbox list.

The calculation of the mean values of returns for the result report can be activated directly in the question.

Optionally, an image can be integrated in a single choice question (vgl. see chapter 2.9.2. "Pictures in Single and Multiple Choice Questions").

After all the options have been entered, click on [Apply]. The single choice question will now appear in the preview and will be automatically highlighted.

![Figure 68: Single Choice Question in the Editor Preview](image)

### 2.7.7. Multiple Choice

A multiple choice question is a question with multiple answer options, several of which can be selected. The number of response options is limited by the form page.

![Figure 69: Illustration of a Multiple Choice Question](image)
Adding Multiple Choice Questions

With the selection of a multiple choice question by [Next] the Question Wizard opens. Here, under the question text, the answer options can be entered, the maximum number of answers in online surveys defined and an image integrated into the question.

![Question Wizard Multiple Choice](image)

Figure 70: Question Wizard Multiple Choice

The question text is entered in the upper input field. To apply formatting, the relevant section of text must be marked. It is recommended to add a note referring to the possibilities of more than one answer.

In the input field "Answer Options", each option is entered one at a time and adopted with [Add Option] in the list of answer options. For subsequent editing of an option, it must be selected with a left mouse click, then the functions “Move up”, “Edit”, “Delete” and “Move down” are available via the icons on the right. With “Edit”, the option in the input field is reset, corrected and with [Update Option] adopted back into the options list.

The ability to limit the number of possible answers is a specific feature of multiple choice questions. The value “Max:” is predefined with “unlimited” which allows all options to be selected. Enter a number here to limit the available options.

Optionally, an image can be integrated in a multiple choice question. (see chapter 2.9.2. "Pictures in Single and Multiple Choice Questions")
With [Apply] the multiple choice question is positioned on the form.

In the Editor preview, multiple choice questions are marked with a red “MC”. This is, of course, not visible in the PDF.

![Figure 71: Multiple Choice Question in the Editor Preview](image)

2.7.8. **Matrix Field**

The matrix field allows the capturing and evaluation of five digit numbers (horizontal matrix question) or 10 digit numbers (vertical matrix question).

Analysis of matrix fields can portray numbers in any dimension.

![Figure 72: Illustration of a Matrix Field Question](image)

**Adding Matrix Field**

With the selection of a matrix field by [Next] the Question Wizard opens. Here, under the question text, the answer options can be entered, the orientation of the matrix, the minimal and maximal value of the value range expected, the numbers of groups for evaluation as well as the way in which matrix values are captured can be set.

The question text is entered in the upper input field. To apply formatting, the relevant section of text must be marked. The orientation specifies how the matrix should be aligned.

In the input field of the minimum and maximum value, the smallest and the largest values expected in this survey are entered.

The group number determines into how many groups the returns are divided in the report. If the group number is left at the default value 0, in the report, each value is displayed in its own bar chart.

Via the matrix value, the matrix field can be set as to whether values are to be read as natural numbers or as text, i.e. as a character string. By capturing matrix values as text, it is possible to correctly capture rows of numbers with leading zeros, as for example, in post codes.
Horizontal Matrix Question

The horizontal matrix question enables you to display five digit numbers.

Example:

The age of survey participants is to be captured via a horizontal matrix field in the value range of 18 to 99 years. It should be possible to retrospectively determine the average age of respondents. In the evaluation, the distribution of age should be grouped in groups of ten.

The question wizard is filled as follows:

![Question Wizard Matrix Field](image-url)

**Figure 73: Question Wizard Matrix Field**
The group number refers to the number of bars that will represent the analysis of this question in the PDF report. A group number of 10 corresponds to the value areas of 26, 27-34, 35-42 […] 92-99, that are 10 groups. If the number of groups is left at the default value of 0, then each value will be displayed individually in the bar chart of the PDF report.

The matrix field is to be output as a numerical value to enable an average value calculating later. Participants in a survey paper now cross in the top row and the 10th digit in the bottom row to the 1st position.

![Figure 74: Horizontal Matrix Field in the PDF preview](image)

Participants of an online survey enter the age directly.

![Figure 75: Matrix Field in the online preview](image)

At the report only the ranges of values are displayed for which data are available.

![Figure 76: Horizontal Matrix Field Report](image)
Vertical Matrix Question

With the vertical matrix question up to ten digit numbers can be entered, i.e. student number, zip codes, etc.

Example:

In a survey, participant’s postal codes are to be captured. The postcode should be displayed in the evaluation report with a leading 0 and in groups of ten.

Select the question type matrix field and click [Next]. You can now enter the text of the question. Then click [Next].

In this example, a vertical matrix question was selected with a minimum value of 00001 and a maximum value of 99999. In the report, the results are presented in 10 categories.

In order to also register leading zeros, the matrix value is captured as text.

Figure 77: Question Wizard Vertical Matrix Field
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The PDF preview of this vertical matrix question looks as follows:

<table>
<thead>
<tr>
<th>1.2 Your Zip code:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>2 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>3 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>4 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>5 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>6 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>7 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>8 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>9 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>0 □ □ □ □ □ □ □</td>
</tr>
</tbody>
</table>

Figure 78: Vertical Matrix Field in the PDF Preview

When filled out, such a matrix question could, for example, look like this:

<table>
<thead>
<tr>
<th>1.2 Your Zip code:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>2 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>3 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>4 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>5 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>6 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>7 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>8 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>9 □ □ □ □ □ □ □</td>
</tr>
<tr>
<td>0 □ □ □ □ □ □ □</td>
</tr>
</tbody>
</table>

Figure 79: Completed Vertical Matrix Question

Note:
The handwritten numbers only serve for clarity (so the student/participant or if necessary the verifier, can check the entry). They will not be read in!

As an alternative to the matrix question and to avoid errors by the participants when they are filling out the form, an ICR question can also be used to record numerical values. The handwritten numerical entries are then automatically analyzed.
Participants of an online survey enter the age directly.

![Figure 80: Matrix Field in the Online preview](image)

At the report only the ranges of values are displayed for which data are available.

![Figure 81: Vertical Matrix Field Report](image)
2.7.9. Grade Value

Grade value questions are used to determine final grades. The result is an average value of the survey results. Grade value questions are NOT suitable for qualitative surveys, as they cannot be used for quality guidelines.

Add Grade Value

The grade value needs only the question text.

Figure 82: Question Wizard Grade Value

Figure 83: Grade Value in the PDF Preview

The survey participant can now give a grade by checking a place before and after the decimal point. For online surveys, the grade value is selected from drop-down list.
As the report the average of the returns is displayed.

Figure 84: Illustration of a Question with Grade Value

2.8. Adding Graphical Elements

2.8.1. Line Space

Using the line space gives extra room between single objects.

Open the menu “Add” in the Editor Control and select “Line Space”. An empty line will be added below the active object.

Figure 85: Line Space in the Editor Preview

The line space can be selected, moved and modified using the clipboard functions “Cut”, “Copy” and “Paste”.

2.8.2. Separator

The separator allows the optical separation of questionnaire content and can be added freely inside question groups.

Open the menu “Add” in the Editor control and select “Separator”. A horizontal line will be added below the active object.

Figure 86: Separator in the Editor Preview

The separator can be selected, moved and modified using the clipboard functions “Cut”, “Copy” and “Paste”.

Note: Please note that only values between 1,0 and 5,0 will be considered.
2.8.3. Text Box

Free texts are text entries, and can be located anywhere on the form. The first element being an exception, which must be created as a text element through a question group (see chapter 2.6. "Adding and Editing Question Groups").

To add a text area open the menu “Add” in the Editor Control and select “Text Box”. A dialog box appears which contains a text box. Type in the desired text or paste content from another text editing tool into this edit box.

Alignment options are available to align the text box content to the left, right, center or as justified text (see chapter 2.5. "Using text fields").

Click on [Apply] to create the text area.

Figure 87: Text Area in the Editor Preview

As with other objects, the text area on the questionnaire can be moved around. The text also appears in online surveys and, if desired, in the PDF report too. To activate this, select the option “Show text boxes” in the menu “System Settings/Report Settings/Configuration”. Users without setting contact the administrator of the system.

2.8.4. Page Break

If a page becomes full VividForms Editor will automatically apply a page break to continue adding objects on the following page.

Page breaks can also be added manually at each phase of the questionnaire. First mark an object by clicking on it with the left mouse button. Now open the menu “Add” in the Editor Control and select the option “Page Break”.

Figure 88: Page Break in the Editor Preview

The page break will be symbolized by a selectable row containing the text // ... Page Break. The next object added to the form will appear on the following page.

If the page break is deleted later, the objects throughout the rest of the questionnaire will realign.
2.9. Adding Pictures

Pictures are always added to the Picture Library. Via the picture wizard, an existing picture in the Picture Library can be used, or a new picture first loaded into the Picture Library and then used. The picture wizard appears when inserting pictures on the form and in single and multiple choice questions. For the centralized use of pictures beyond more than a single form, the direct storage of pictures in the Picture Library is recommended.

Note:
Pictures must be available in the PNG format (without alpha canal) or as a JPEG. A customized resolution (e.g. 72dpi for online surveys) supports the performance of the entire system.

The JPEG-Format is highly suitable for photos. Due to losses in compression and the resulting loss of detail, it is not recommended for text or graphics.

The advantage of the PNG format is loss free, compressed storage, which the JPEG file format cannot deliver. This format is therefore well suited for both photos and text and graphics. However, files in PNG format are significantly larger than corresponding JPG files.

Picture Assistant

In the first step, the source of the pictures is selected. If the picture is already in the Picture Library, it can be clicked on in the selection list. When a new picture is uploaded, an additional dialog appears which is explained in see chapter 2.9.3. "Upload Pictures to the Picture Library“.

Additionally you can define the position of the picture on the questionnaire – left-aligned, centered or right-aligned.

If you choose to scale the picture, the basis for this is the width of the page (width of page = 100%).
[Apply] closes the wizard and adds the picture either beneath the last active element or into the question.

Figure 89: Picture Assistant
2.9.1. Integrating Pictures in a Questionnaire

You can find the option “Picture” in the menu “Add”. As with the other items you can only add a picture to a question group. As long as you do not define a question group you cannot select the option “Picture”.

You can find the option “Picture” in the menu “Add”. As with the other items you can only add a picture to a question group. As long as you do not define a question group you cannot select the option “Picture”.

Figure 90: Option “Picture” in the Menu “Add”

When clicking on “Picture” the above described picture assistant opens in a new window. Via clicking on the picture and using the key [Delete] you can remove the picture from the questionnaire again. (Alternatively you can set the focus on the picture and choose “Delete” in the menu “Clipboard”.)

The position and selection of pictures can be changed after insertion (as long as the questionnaire is not in use). Just double-click on the picture and the picture assistant will open. (Alternatively choose “Picture” in the menu “Edit”.)

Figure 91: Picture in the PDF Preview

If you look at the PDF preview (you can view this via the PDF symbol above the upper left corner of the form), you will get a preview of the actual appearance of the questionnaire.
2.9.2. Pictures in Single and Multiple Choice Questions

For both single choice and multiple choice questions, pictures can be integrated into questions.

Figure 92: Question Wizard Integrate Pictures

With click to [Integrate Image] opens the picture assistant. In addition to the above mentioned settings, can in single - and multiple choice questions, the alignment of the text to question the answer options are set.

Figure 93: Picture Assistant Alignment
There are different possibilities available for the alignment of the image:

- Next to answer options (default setting)
- Between question text and answer options
- Below question text and answer options
- Next to question text and answer options

With [Apply], the settings are saved. After inserting the question, the image at the desired position is displayed on the sheet.

Figure 94: Multiple Choice Question with Integrated Image

To subsequently edit the picture, the question must be opened. With "Integrate Picture" the picture wizard opens and the corrections can be made. "Delete Picture" in the question, deletes the picture.

2.9.3. Upload Pictures to the Picture Library

If pictures are to be made available independent of a form, it makes sense to store these pictures directly in the Picture Library.

To upload pictures click on “Picture Library” in the menu “Form Properties” in the Editor Control.

Figure 95: Option “Picture Library” in the Menu “Form Properties”

The new window “picture library” appears. In the upper area, pictures can be loaded into the Picture Library, in the lower area, existing pictures can be edited or deleted.
Figure 96: Picture Library Assistant

Upload pictures

If you click on [Browse], you can search for the picture in your file system. In the input field "Name", a "speaking" name is entered. This description is displayed when pictures are to be used from the picture library. The description text serves as an explanation of the content and is relevant to barrier free online surveys. Clicking on [Upload pictures] integrates it in the picture library.

Edit pictures

In the section "Edit Picture", the properties, name and description text of the picture marked can be changed. The selected picture is shown in a Preview. [Apply] completes the processing. Clicking on [Delete picture] removes the marked picture immediately from the list.
2.10. Form Properties

The menu "Form Attributes" contains functions that affect the entire questionnaire. As such, using the function "Form Properties", the settings on the questionnaire can be edited (see chapter 2.1. "Define Form Information").

2.10.1. Layout Settings

![Menu “Layout Settings”](image1)

Figure 97: Menu “Layout Settings”

Via the menu item “Layout Settings” in the menu “Form Properties”, you can choose between two layout variations, the “Traditional Layout” and the “Optimized Layout”. New questionnaires are generally produced with an optimized layout, which has an improved alignment of the checkboxes. Existing forms that were created with earlier versions of Class Climate, retain the traditional layout. If these are copied for further processing, the optimized layout can be assigned to them later.

![Adjusting Layout Settings](image2)

Figure 98: Adjusting Layout Settings
The default setting for the position of the response options of single choice questions is anchored in the layout settings at the bottom. The settings selected here (next to the question text/beneath the question text) apply to all single choice questions that are newly inserted. In the properties of each question, the position can be adjusted manually, if necessary.

### 2.10.2. Repair Form

When editing large questionnaires it may occur in rare cases that the order of the objects gets confused. In such a case click on “Repair Form” in the “Form Properties” menu of the Editor control. The questionnaire will be rebuilt.

### 2.10.3. Numbering of Questions

With the function "Number Questions”, all question groups and questions can be numbered or not numbered with a click. The text element and the free texts are not counted.

### 2.10.4. Adjusting Color Scheme

Under a new menu item in the “Form properties” (“Change color scheme”) different color shadings for question groups and questions can be defined. This improves the readability and increases the optical quality of the questionnaire.

![Figure 99: Adjusting Color Scheme](image)

After clicking on the pencil icon, the color selection dialog opens.
Here, at the top of the window, you can select a color directly, set as an RGB value or as an hexadecimal number.

![Color Scheme Assistant]

Figure 100: Color Selection Dialog

At the bottom of the dialog, the brightness of the color is set. Whilst the font and the background for question groups may have any color depth, the color value for the background of the questions should not be too dark, so as to ensure high readability when scanning. Class Climate immediately checks the brightness of the selected color. If too dark a color was selected, the message “A brighter color is required” appears. With the slider in the area “Brightness”, the brightness can be increased. Once the allowed minimum brightness is reached, the warning disappears. The new color can be adopted by clicking on [OK].

The following figure shows an example of a questionnaire with an adjusted color scheme:

![Questionnaire with Adjusted Color Scheme]

Figure 101: Questionnaire with Adjusted Color Scheme

The color scheme only affects paper questionnaires. Online surveys are controlled by an online template (see chapter 2.3.2. "Online View").
2.10.5. Line Height, Font Size and Font Type

With the line height you can change the vertical space needed for a line. This could be necessary if, for example, a questionnaire does not quite fit on two pages. Decrease the line height and you will be able to make do with two pages.

On the other hand a questionnaire that is not quite filled can be made to look better by increasing the line height.

The font size affects all question objects with the exception of chapter headings. These should not be made too large.

The following font types are available: Arial, Georgia, Tahoma, Times New Roman and Verdana.

Note:
Please examine the PDF sample issue after changing the font type using the PDF preview to make sure that all texts appear correctly. If not you may have to reduce the font size.

2.10.6. Adapting the Size of Answer Boxes

You can change the size of your answer boxes in the VividForms Editor under “Form properties”. You have five sizes (8pt, 9pt, 10pt, 11pt and 12pt) to choose from:

Note:
Line spacing must be at least 2pt greater than the checkbox size.
If, for example, you have defined a line spacing of 11pt and then set your checkbox size up to 11pt, the system automatically increases the line spacing to 13pt.

If you reduce the line spacing, Class Climate automatically reduces the size of your checkboxes so that, as a basic principle, a minimal difference in size of 2pt is ensured.

**Hint:**
In order to achieve an appealing layout for your questionnaires, we recommend selecting a minimal difference in size of at least 3pt in relation to the size of your checkboxes.

**Attention:**
For reasons of space, scaled questions with 11 answer options can only be displayed with a box size of 8 pt.
The automatic reduction of the number of boxes through the increase in box size must be corrected manually if the box size is again reduced.

These changes (decrease in the number of checkboxes) only occur with scaled questions, other question types are not affected.

### 3. Filter Settings, Validation, Required Questions, Cross Tabulations

If you open the menu “Form Properties” in the Editor Control, you will find the options “Filter settings” and “Validation, Cross Tabulations, Required Questions”. Click on this option and the dialog for editing these elements will open up. It is advisable to use these features only when all the elements are arranged correctly on the form.

- **Filter Settings**
  Here it is determined which questions in online surveys are answered under which conditions. In this way, various lines of enquiry can be depicted on the questionnaire. For paper based surveys, filter rules are applied retroactively, after processing, thus adjusting the raw data.

- **Validation**
  In online surveys, answers to matrix and open questions can be tested with value ranges as well as regular expressions before a survey participant can submit the questionnaire.

- **Required Questions**
  In an online survey, questions can be selected in which an answer must be given in order to submit the form.
• **Cross Tabulations**

The cross tabulations shown here will appear in the PDF report.

### 3.1. Filter Settings

With the definition of filter settings, questions and elements of the form can be hidden or disabled which, under certain conditions, are not relevant to the survey participant. These conditions can be defined in single choice, multiple choice or scaled questions.

In paper surveys these questions can still be answered and scanned. Subsequently, the filtered answers are deleted from the database of the survey. In online surveys, the filter acts directly in the survey. Filtered questions cannot be answered and/or hidden elements cannot be seen.

Fundamentally, questions and elements can assume three states: deactivated & gray, deactivated & hidden, activated and visible.

![Filter Settings](image)

**Figure 104: Filter Settings**

In the section "Initial Setup of the Questionnaire" the initial state of the questions is set. By default, all questions are activated and displayed. If individual questions are only to become visible after a combination of answers, these questions can be selected with [Edit]. The required state is assigned via the selection list and accepted with [Save].
With a click on [Add], the filter setting screen opens.

In the upper section is the question to which the filter is to be applied. In the next section, one or more answer options are selected that require the filter. In the bottom section, all elements of the form whose state is to be affected by the filter are clicked. The required question state is determined via the selection list.

The [Save] button applies the settings and returns to the filter list. The [Back] key cancels the setting of the filter and goes back to the filter list overview.
In the filter list, the new rule has been added and can now via action icons be edited (pencil icon) or deleted (Red Cross). With [add], more filter rules can be entered.

3.2. Validation

Validations are useful in online surveys only. By defining validations you can test entries to open questions and matrix fields in online surveys with value ranges and regular expressions before a survey participant can send the questionnaire.

![Validation](image)

**Figure 107: Validation**

To create validations select a matrix field or an open question from the list and click on [Add].

Now select which values can be accepted:

- Numbers only – Here you can delimit the value range by storing a minimum and maximum value.
- Letters only – i.e. no blanks
- Letters or numbers only.
- Date.
- Pattern (simplified syntax) – By default, the following templates are available:
  - three-digit number,
  - word(underscore)number,
  - serial number.

All three examples are based on the following legend:

- L = Letter
- W = Word
- D = Digit
- N = Number
- A = Alphanumeric (= digit or letter)
In addition, there is the possibility of using square brackets to label a placeholder as optional. In this way, the following pattern: D[D][D]-W means that only input consisting of a number of one to three digits, a hyphen and a word (in this order), will be accepted.

As well as the common syntax for patterns, there is also the possibility of using regular expressions (on the basis of Perl syntax) to formulate patterns. Regular expressions are often used to recognize patterns and offer a high level of flexibility.

- Pattern (regular expression) – The following template choices are available:
  - three-digit number,
  - word(underscore)number,
  - serial number (simple),
  - serial number (complex),
  - email address.

**Note:**
A question text should contain instructions for the correct completion of a validation question, so that the survey participant knows which input is admissible.

### 3.3. Required Questions

Questions for which an answer is compulsory can be configured as required questions. When submitting a questionnaire in an online survey the system checks if all required questions have been answered. If this is not the case, the survey cannot be submitted unless answers to the required questions have been given.

![Figure 108: Configuration of Required Questions](image)

To define the required questions select one or multiple questions and click on [Save]. The selected questions will be displayed with a blue background.

**Note:**
Unlike the filter settings, required questions are not recognized in paper surveys.
3.4. Cross Tabulations

In order to use cross tabulations for reports this function must be activated at “System Settings/Report Settings/Configuration/Create Cross Tabulation”.

In the selection list for question 1 and question 2 the single choice or scaled questions are selected which are to be evaluated together.

[Add] adopts the crosstab. An existing matrix can be edited using [Change], and [Delete]. Additional tables can be created. The number of crosstabs is not limited.

In the evaluation, question 1 is presented in the X-axis, Question 2 in the Y axis of the crosstab, and two crosstabs per page are displayed.

Figure 109: Create Cross Tabulations

The upper question is displayed in the X axis while the lower question is found in the Y axis of the matrix. The number of cross tabulations is unlimited. In the PDF report two cross tabulations per page will be displayed.

Figure 110: Cross Tabulations in the PDF Report
4. Use of the Question Library with VividForms

In the question library you can store and archive questions and questions group for further use on different forms.

You can integrate both question groups and questions from not yet implemented questionnaires, as well as protected questionnaires into the question library. In the following, the procedure for adding the question groups and questions is described in detail. In the following, the use of the Question Library in VividForms editor is explained. More information on how to access the Question Library from outside of the editor can be found in the "User Manual".

In VividForms Editor the "Question Library" can be reached via the editor control. In the submenu “Question Library” all relevant functions are available.

![Figure 111: Question Library](image)

Additionally you can use the separate menu “Add from Question Library" to comfortably add questions to the form with the help of drag-and-drop.

![Figure 112: Add from Question Library](image)
4.1. Adding a Question from the Library

Via the menu “Add from Question Library” (next to the Editor Control) you can drag question groups or single questions onto the worksheet. The option “Choose a question from the library…” automatically links to this menu.

If a question group or question can be added to the form, the element is marked by a + symbol and a green bar.

If a question group or question cannot be added, the element is marked with an x symbol and a red bar.

This can be the case, if an element is not dragged to a position where it can be added to the form or if you try to add a parent group or more than one question group at a time. Please be aware that there always has to be a question group. Either the element you drag onto the form is a question group or you drag one or more questions into a group already existing on the form.

You can recognize question groups or questions which have been taken from the library by the symbol at the left margin of the questionnaire.
You can also add more than one question at a time via drag-and-drop by pressing the CTRL button.

The question type is indicated by a small icon in front of the question and in the tool tip.

Questions and question groups are connected to the library and cannot be changed.

If the question is opened, the selection choices in the question wizard are grayed out. In the upper right corner is the library symbol.

4.2. Undoing the Connection to the Library

In order to be able to edit a question transferred from the library, the library connection must first be detached. If the question is active, the function "Detach Library Question ..." in the "Question Library" menu is used. Now the question can be edited.

If the library connection of question groups is to be detached, the function "Detach library group ..." is used. This also means that the questions in the question group are editable again.
4.3. Adding a Questions or Question Groups to the Library

Questions

If you would like to add a question you have highlighted, click on “Add selected question to the library...” in the area question library on the edit bar.

The dialog shown below will appear. You have three options:

![Question Library Assistant](image)

Figure 119: Question Library – Add a Question to the Library

- **Include in an existing Question Group**
  Select a group from the list and click on [Apply]. The question is added to this group.

- **Create a new Group**
  Select the second option and enter the name for the new group. Click on [Apply]. The question is added to the new group.

- **Add the current (highlighted) Group**
  Select the third option. The current group will be added as a new group in the library and the highlighted question will be added to this group.

**Note:**
Only the (subunit) administrator can create groups, which are visible to all users, by activating the checkbox “Question visible to all users”. Groups and questions created by Instructors are only visible to themselves.

[Apply] inserts the question in the appropriate group. The questions on the form are signed with the library symbol now
Question Groups

To integrate a selected question group into the library, click the option “Add selected question group to library...” in the menu “Question Library”.

[Apply] confirms the use of the question group for all. [Cancel] stores the question group non-publicly.

If there are parent groups in the question library, you can now select the desired group. If you do not want to add the group to a parent group, select “None”.

When clicking [Apply] the question group will be stored on the first or second level within the question group.
The question groups and questions you have added to the library are available when clicking the button [Update Library]. The question group “Questions about the teaching material” has been added to the library without a parent group. The question group “Questions about the seminar” has been added to the parent group “Seminar” already existing in the library.

Once added, the question groups and all questions contained therein are marked with the library symbol.

4.4. Deleting a Question or a Question Group from the Library

If a connection to the question library exists for a question on the form, this question can be removed from the library using the "Delete selected question from library ...". The question remains on the questionnaire and is editable.

For connected question groups, the function "Delete selected question group from library ..." has the same effect. The question group and the questions contained therein are deleted; on the form they remain preserved.
5. Passing on Questionnaires

If you have finished editing your questionnaire, click “Save and Exit” in the upper left corner.

![Save and Exit](image)

Figure 123: Exit VividForms Editor

If the editor has accidentally been closed during work, e.g. by a time-out, the changes you have done to the form will not be lost. The form is saved in the background after each change.

6. Read Only Mode

When creating surveys with a questionnaire, the sheet is automatically write-protected. In protected forms, no layout changes whatsoever may be undertaken, to guarantee the processing of forms already in circulation.

Write-protected forms can be recognized by a warning message which is displayed on top of the Editor control.

![Warning message write-protect mode](image)

Figure 124: Warning message write-protect mode

Furthermore the Form Information menu indicates whether a form is currently in edit mode or in write-protect mode.

![Form Information](image)

Figure 125: Read Only Mode
The following points have no effect on the display of the questionnaire and can so be modified in the write-protect mode:

- Building indicators for question groups
- Display of single choice questions in the online survey (Options available include “checkbox-list” and “drop-down list”)
- For matrix fields, number of groups in the evaluation report
- Limiting the maximum responses for multiple choice questions
- Selection of the diagram type for scaled questions in the PDF report
- Definition of filter rules, validation, required questions and cross tabulations

In particularly exceptional cases (for example for typos), the read only mode can be circumnavigated. You can alter the read only mode in the form creation information of a questionnaire, as shown in the following graphic.

Figure 126: Aktivate Edit Mode

7. Use of Templates in Instructor Accounts

Templates can only be extended with (Subunits) own elements, and when the (Subunit) Administrator has approved the amendment.

In VividForms Editor, the question groups and questions derived from templates appear with a [T] (= Template) and cannot be deleted or edited.

The user can also add any other question groups and questions, as long as neither the maximum number of pages nor the maximum number of questions set by the Administrator is exceeded (see the Meta information of the questionnaire).
If the administrator has given the authorization, a click on the pencil symbol allows the user to begin editing the questionnaire. Questions from the administrator’s template appear in the Web editor with a [T] (= Template) and cannot be deleted or edited.

The user can add as many question groups and questions as needed, as long as he does not exceed the maximum number of pages or the maximum number of questions defined by the administrator (see form properties of the questionnaire). Before adding a question to the questionnaire, the user first has to create a new question group. Questions cannot be added to groups already created by the administrator. When setting the form properties, the administrator can define that new elements added by users (such as question groups, questions or design elements) may only be inserted at the end of the questionnaire.

In this example, the question group “Own Questions” has been added by the active user. In “Form Properties” in the menu “Form Properties” the short name and the description of the questionnaire can be edited.
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