
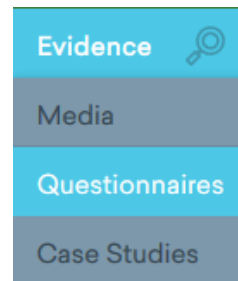


How to Create a Questionnaire

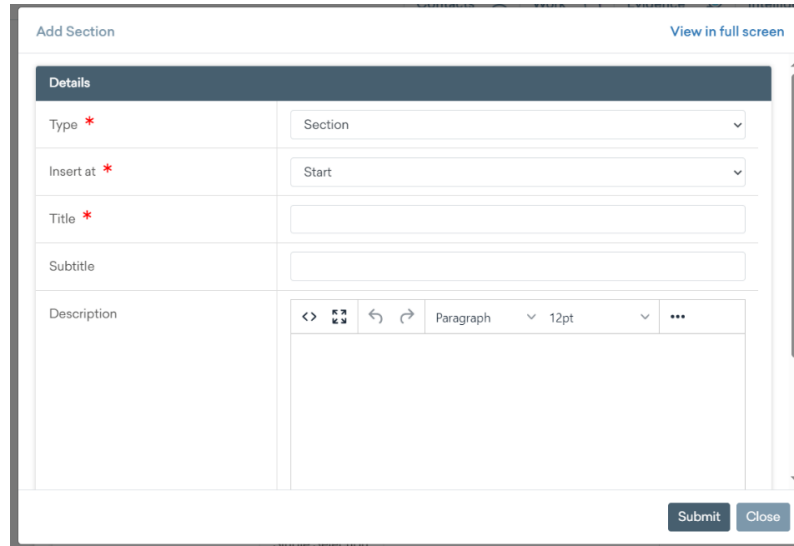
The **Questionnaires** area of Views allows users to create various types of forms, such as evaluation forms, session plans, and risk assessments. Administrators can create new questions, edit or disable existing ones, and rearrange the order of the questions. Forms can also be organised into sections and pages. This guide provides step-by-step instructions on how to manage these tasks.

- Hover over **Evidence** and select **Questionnaires**.
- Click on the **Plus icon**. 
- Complete the form with the necessary details.
- Click **Save**.



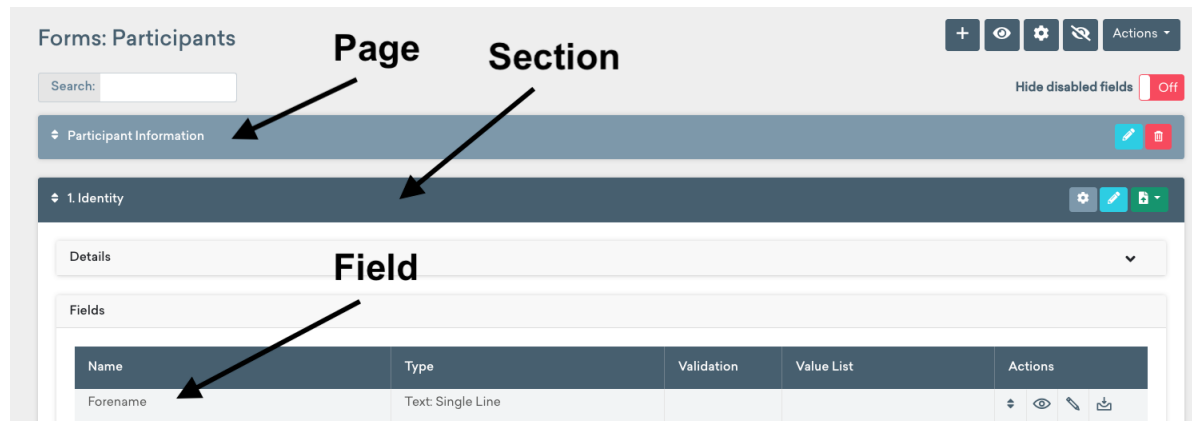
How to Create a New Section or Page

- Hover over **Evidence** and select **Questionnaires**.
- Click on the **eye icon** next to the relevant questionnaire.
- Selection **Evidence** from the menu on the left-hand side.
- To add a new Section or Page, click the **plus icon** and select either **Add Section** or **Add Page**.



The screenshot shows a dialog box titled "Add Section" with a "View in full screen" link in the top right corner. The dialog is divided into a "Details" section and a "Description" section. The "Details" section contains four rows of form fields: "Type" with a dropdown menu set to "Section", "Insert at" with a dropdown menu set to "Start", "Title" with an empty text input field, and "Subtitle" with an empty text input field. The "Description" section contains a rich text editor with a toolbar showing icons for bold, italic, and link, along with a dropdown menu set to "Paragraph" and a font size dropdown set to "12pt". At the bottom right of the dialog are "Submit" and "Close" buttons.

- Under **Insert at**, choose where you want the Section or Page to be placed.
- Enter the name of the Section or Page under **Title**. You can also add a **Subtitle** and **Description**, which will appear on the Questionnaire.
- Click **Submit**.
- Your new Section or Page will now appear, and you can begin adding new Questions.



How to Create a New Questions

Question types define the kind of data that can be entered or stored within Views. Common question types include:

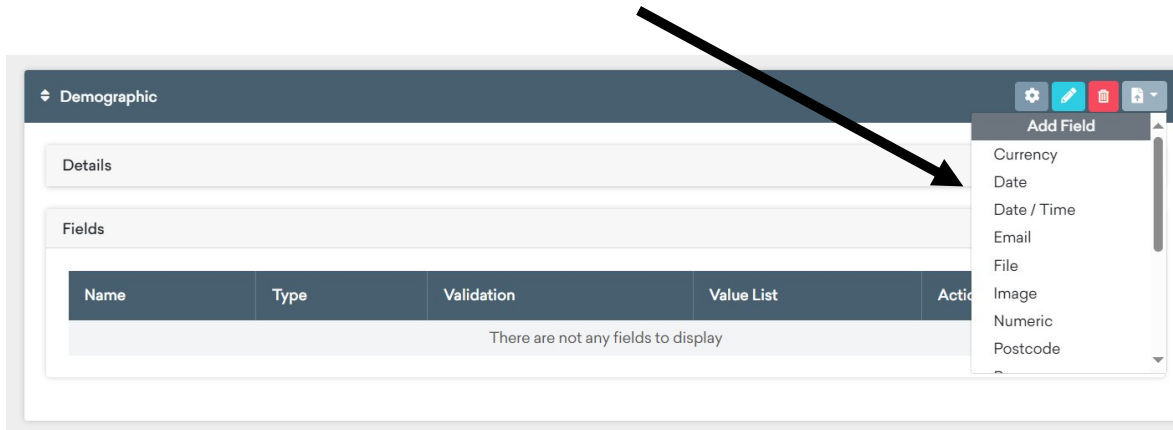
- **Text questions** for words or phrases
- **Number questions** for numeric values
- **Date questions** for dates
- **Dropdown questions** for selecting from a predefined list of options

Each question type is designed to handle specific types of information efficiently and accurately. Please see [Appendix 1](#) at the end of this guide for a full list of question types and their descriptions.

- Click on the **green 'Add Question' icon** to add your question to the specific Section or Page.



- Select the appropriate **Input Type** for the new Question.



- Enter a **Name** for the question. If the question requires a **Value List**, you can either select an existing one or click **Add Value List** to create a new one.

Add Field : Selection (Single)

Details

Name *	<input type="text" value="Gender"/>
Tagline	<input type="text"/>
Value List *	<input type="text" value="123 (123)"/> <input type="button" value="Add Value List"/>
Default Value	<input type="text" value="Unset"/>
Specify "Other" Option	<input type="checkbox"/> No

- Depending on the **Question Type**, you will have access to:
 - **Render Options:** Choose how the questions will be displayed.


Render Options	
Display as *	Dropdown
Exclude From Numbering	No
Not Visible If	Unset
Visible If	Participant Risk Factors (Parti... Gender identity
Visible With	Unset
Visible without	Unset

- **Validation Rules:** Define how the data will be collected for this question.


Validation Rules	
Required	No
Required With	Unset
Not Required With	Unset
Required Without	Unset
Required if	Unset
Not required if	Unset

- A full matrix of Validation Rules can be found in [Appendix 2](#) at the end of this guide.
- Once you have finalised your options, click **Save** to create the question.

How to Edit a Question


- Hover over **Evidence** and select **Questionnaires**.
- Click on the **eye icon** next to the relevant questionnaire.
- Selection **Evidence** from the menu on the left-hand side.
- Locate the question you want to edit and click the **pencil icon** next to it. 
- Make the necessary changes, then click **Submit**.

How to Disable a Question


- Hover over **Evidence** and select **Questionnaires**.
- Click on the **eye icon** next to the relevant questionnaire.
- Selection **Evidence** from the menu on the left-hand side.
- Locate the question you want to disable and click the **disable icon** next to it. 

How to Restore a Question

- Hover over **Evidence** and select **Questionnaires**.

- Click on the **eye icon** next to the relevant questionnaire.
- Selection **Evidence** from the menu on the left-hand side.
- Locate the question you want to restore and click the **restore icon** next to it. 

How to Edit the Order of Questions


- Hover over **Evidence** and select **Questionnaires**.
- Click on the **eye icon** next to the relevant questionnaire.
- Selection **Evidence** from the menu on the left-hand side.
- To reorder questions, click and hold the **arrow icon** to the right of the question, then drag it to the desired position. 
- To reorder sections, click and hold the **arrow icon** to the left of the section, then drag it to the desired position.



Appendix 1: Question Types

Currency

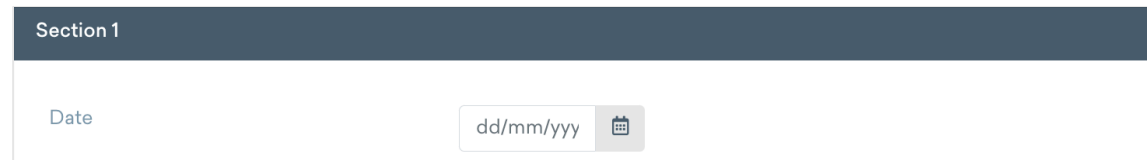
Stores monetary values, ensuring correct formatting based on the relevant currency.



A screenshot of a form field within a dark blue header labeled "Section 1". The field is labeled "Cost Per Session" and contains a currency symbol (£) followed by an empty input box.

Date

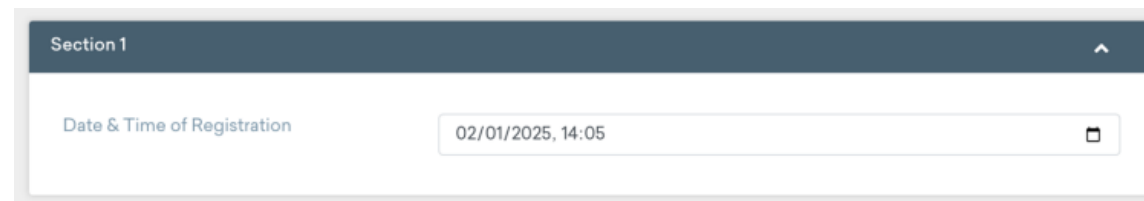
Captures a calendar date (e.g., DD/MM/YYYY) with date selection options.



A screenshot of a form field within a dark blue header labeled "Section 1". The field is labeled "Date" and contains the text "dd/mm/yyyy" followed by a calendar icon.

Date/Time

Stores both a date and a time value, allowing for precise timestamping.



A screenshot of a form field within a dark blue header labeled "Section 1". The field is labeled "Date & Time of Registration" and contains the text "02/01/2025, 14:05" followed by a calendar icon.



Email

Captures and validates email addresses to ensure correct formatting.

Section 1 ^

Email

File

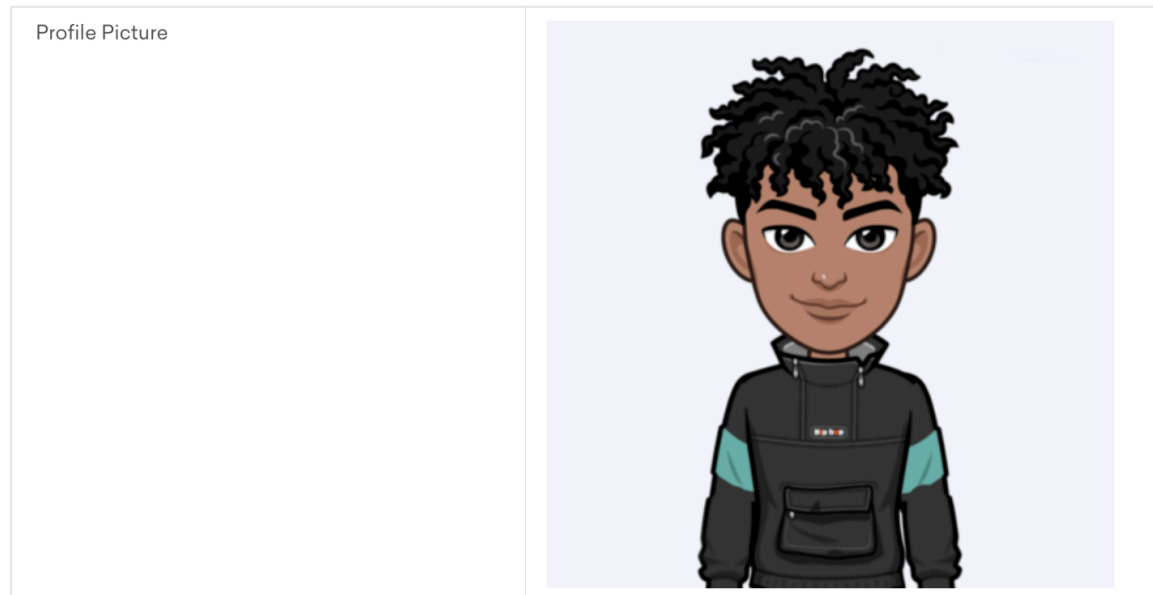
Enables users to upload and store files in supported formats.

Section 1 ^

File (Max Size: 2MB) No file chosen

Image

Enables users to upload image files, with preview functionality.



Numeric

Stores numeric values, ensuring only numbers are entered.

Section 1

Number Field

Matrix

Presents a grid format where users can provide multiple responses based on row and column criteria, useful for rating scales and comparisons.

Section 1 ^

How do you rate the service against the following measures?

	Very good	Good	Average	Bad	Very bad
Location	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Activities provided	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delivery staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Refreshments	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Postcode

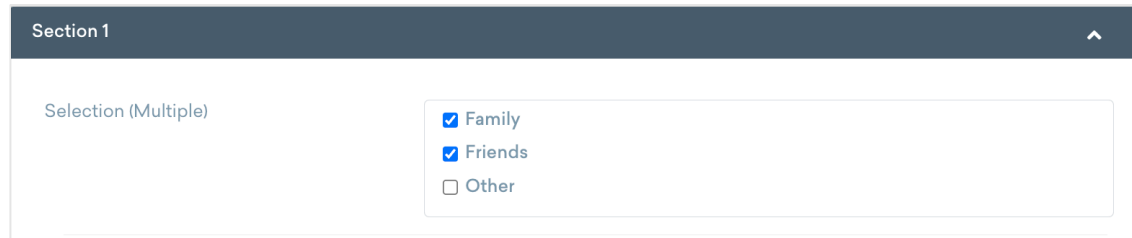
Captures postal codes, often with validation for correct format based on region.

Section 1 ^

Postcode

Range

Allows users to select a numeric value within a defined range (e.g., 1–100).



A screenshot of a form element titled "Section 1". The form contains a label "Selection (Multiple)" and a list of three options: "Family" (checked), "Friends" (checked), and "Other" (unchecked).

Ranking [Questionnaires Only]

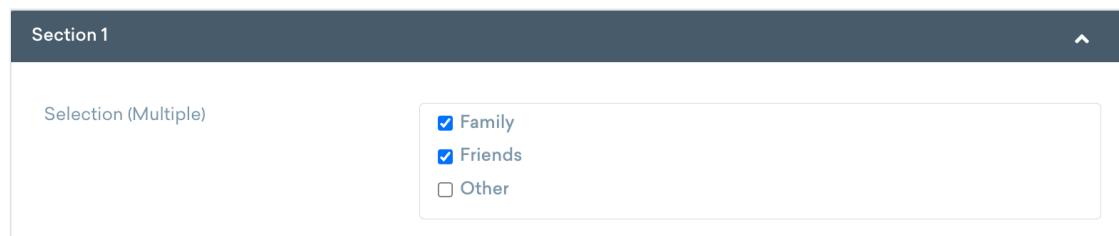
Allows users to rank a list of items in order of preference or priority.



A screenshot of a form element titled "Section 1". The form contains a label "Rank the activities, from most favourite to least favourite" and a list of four activities: "Dance", "Football", "Orienteering", and "Tennis". Each activity has a double-headed arrow icon next to it, indicating it can be moved.

Selection (Multiple)

Enables users to select multiple options from a predefined list.



A screenshot of a form element titled "Section 1". The form contains a label "Selection (Multiple)" and a list of three options: "Family" (checked), "Friends" (checked), and "Other" (unchecked).

Selection (Single)

Allows users to select a single option from a predefined list.

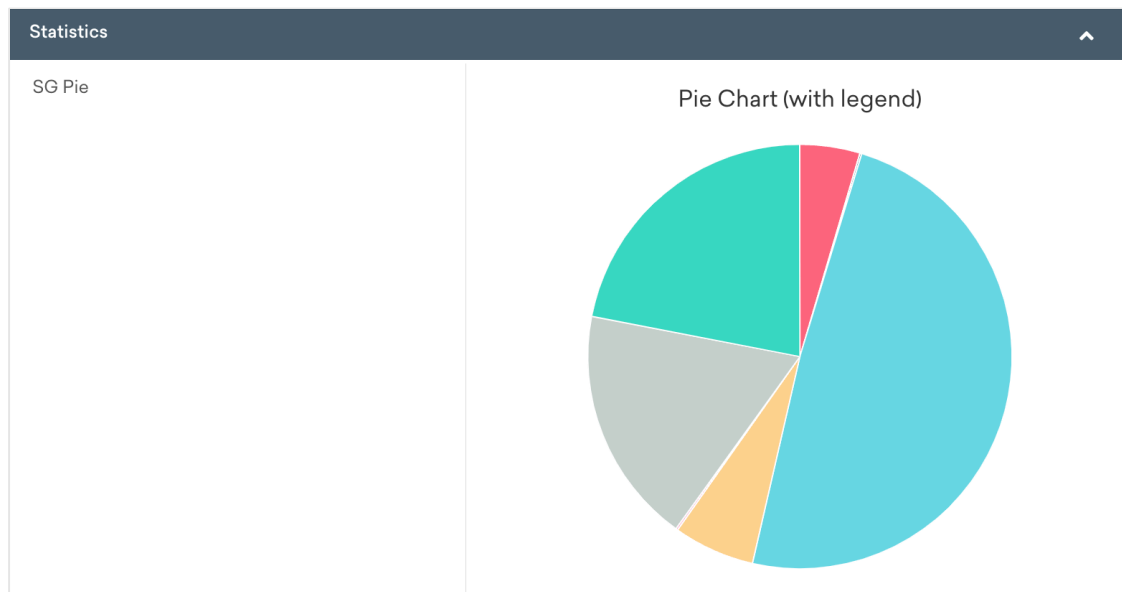
Section 1

Selection (Single)

- Agree
- Neutral
- Disagree
- Strongly Disagree

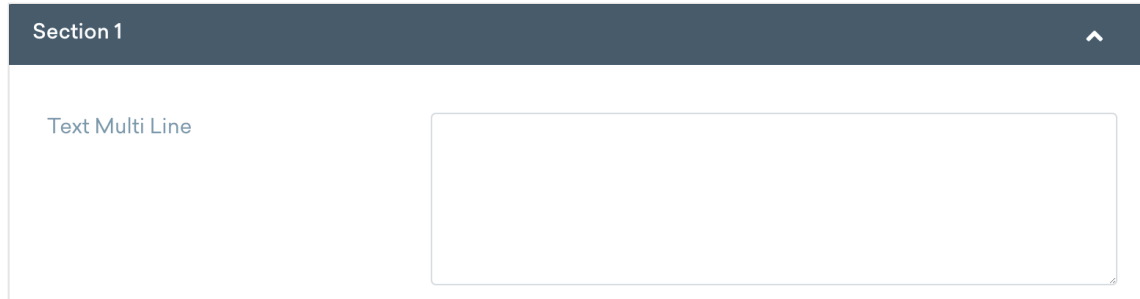
Statistic

Displays calculated or summarised data, derived from statistics saved in the **Intelligence** area.



Text: Multi Line

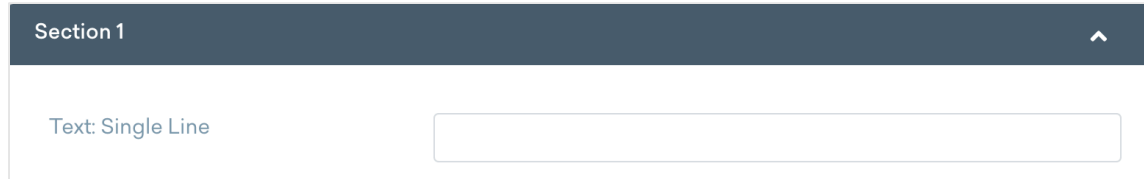
Provides a larger text area for entering longer responses, such as comments or descriptions.



A screenshot of a form element titled "Section 1" with an upward arrow icon. The label "Text Multi Line" is positioned to the left of a large, empty rectangular text input area.

Text: Single Line

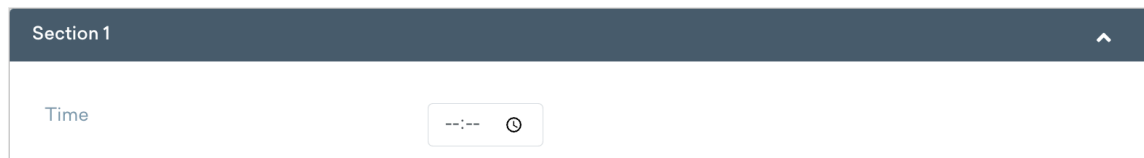
Captures short text entries, such as names or titles.



A screenshot of a form element titled "Section 1" with an upward arrow icon. The label "Text: Single Line" is positioned to the left of a single-line text input field.

Time

Stores time values (e.g., HH:MM), often with time selection functionality.



A screenshot of a form element titled "Section 1" with an upward arrow icon. The label "Time" is positioned to the left of a time selection widget, which includes a "--:--" placeholder and a clock icon.



URL

Captures website addresses, ensuring proper URL formatting.

15. Website	https://www.substance.net/
-------------	---------------------------------------------------------------------

Appendix 2: Validation Rules

Validation Rule	Description
Alpha	Must only contain letters.
Alpha Dash	Must only contain letters and dashes.
Alpha Dot	Must only contain letters and full stops.
Alpha Dot Dash Space	Must only contain letters, full stops, dashes and spaces.
Alpha Numeric	Must only contain letters and numbers.
Alpha Numeric Punct	Must only contain letters, numbers and punctuation.
Alpha Numeric Space	Must only contain letters, numbers and spaces.
Alpha Numeric Underscore	Must only contain letters, numbers and underscores.
Alpha Space	Must only contain letters and spaces.
Date Age From	Age on date must be older than specified age.
Date Age To	Age on date must be younger than specified age.
Date Not After	Date cannot be after specified date.
Date Not After Today	Date cannot be after today.
Date Not Before	Date cannot be before specified date.
Date Not Before Today	Date cannot be before today.
Datetime Age From	Age on date/time must be older than specified age.
Datetime Age To	Age on date/time must be younger than specified age.



Datetime Not After	Date/time cannot be after specified date/time.
Datetime Not After Today	Date/time cannot be after today.
Datetime Not Before	Date/time cannot be before specified date/time.
Datetime Not Before Today	Date/time cannot be before today.
Decimal	Must be a decimal.
Display as hyperlink	Display the URL as a hyperlink
Display as mailto: hyperlink	An email hyperlink will be added to the email when viewing the form.
Exact Length	Must contain the specified number of characters.
Exact Length if	Must contain the specified number of characters, when the specified field contains the specified value.
Exclude From Numbering	Exclude field from automatic numbering.
Ext In	Extension of uploaded file must match the listed extensions.
Greater Than	Must be greater than the specified number.
Greater Than Equal To	Must be greater than or equal to the specified number.
Increment	Specify a number that the value should be in increments of.
Integer	Must be an integer.
Is Image	Must be an image file type.
Is Natural	Must be a natural number.

Is Natural No Zero	Must be a natural number and cannot contain 0.
Is Numeric Non Zero	Must be numeric and cannot contain 0.
Less Than	Must be less than the specified number.
Less Than Equal To	Must be less than or equal to the specified number.
Max Dims	File dimensions must not exceed the specified pixel value (width x height).
Max selection	Set the maximum number of values that can be selected.
Max Size	File size must not exceed the specified value (MB).
Maximum length	Cannot contain more than the specified number of characters.
Min selection	Set the minimum number of values that must be selected.
Minimum length	Cannot contain less than the specified number of characters.
Must differ from	Must differ from the value contained in the specified field.
Must match	Must match the value contained in the specified field.
Not required if	Not required when the specified field contains the specified value.
Not required with	Not required if data is entered in the specified field.
Not visible if	Not visible when the specified field contains the specified value.

Not visible with	Not visible if data is entered in the specified field.
Real Url	Must contain a real URL.
Required	Field is always required.
Required if	Required when the specified field contains the specified value.
Required With	Required if data is entered in the specified field.
Required Without	Required if data is NOT entered in the specified field.
Richtext	Determines if the text box should be richtext enabled.
Rows	Number of rows to display in the text box.
Tagline	Add a tagline to provide more information about the field.
Time Not After	Time cannot be after specified time.
Time Not Before	Time cannot be before specified time.
Unique	Must be unique and cannot match any other record.
Valid Email	Must contain a valid email.
Valid Emails	Must contain valid emails, separated by a comma.
Valid Ext	Uploaded file must have a valid extension.
Valid Ip	Must contain a valid IP address.
Valid Phone Number	Must contain a valid phone number.
Valid Postcode	Must contain a valid postcode.



Valid Uk Postcode	Must contain a valid UK postcode.
Valid Url	Must contain a valid URL.
Value List	Select the value list to use for this field.
Visible If	Visible when the specified field contains the specified value.
Visible With	Visible if data is entered in the specified field.
Visible Without	Visible if data is NOT entered in the specified field.