



# Working With Forms and Surveys

## User Guide

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# About Doubleknot Forms and Surveys

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This section contains background information about forms and surveys in Doubleknot. The following topics are covered:

- [What's the difference between event forms and the forms and surveys feature?](#)
- [What are conditional logic and page branching?](#)
- [Why are some form and survey options not discussed here?](#)

## What's the Difference Between Event Forms and the Forms and Surveys Feature?

An event form is a special kind of form created within Event Management to gather registration information for an event. Event forms have many elements in common with regular forms and surveys and contain additional unique features such as the ability to assign costs for selected items.

This document covers general forms and surveys that are used to gather information or opinions, and are created in the Forms and Surveys function in the Feature List. Event forms outside the Event Management module.

## What Permissions are Required to Use Forms and Surveys?

To access Forms and Surveys, your account must have Create or Administrator permissions for Event Management. More information on user permissions is located in the Managing Member Profiles user guide.

## What are Page Branching and Conditional Logic?

**Page branching** allows you to choose a page to display based on the respondent's answer to an item on a page. For example, a form could ask whether the respondent is interested in learning more about a topic. If the respondent answers "No," page branching can bypass any pages of information about the topic and take the respondent directly to the next relevant page. More information is located in [Skipping Pages with Page Branching](#).

**Conditional logic** provides fine-grained control which pages and items are displayed to the respondent based on what the respondent already entered or selected. For example, consider a volunteer information form for a fundraising event. On the first page, respondents select the volunteer position that they're interested in. The next page can display questions about their experience and interest in the position—if someone indicated an interest in driving for field trips, they could be asked questions about their driver's license, liability insurance, and how many people they can fit in their vehicle. If they expressed interest in a different volunteer position, such as clerical assistance, the questions about driving would not be displayed and the potential volunteer would be presented with relevant questions about their office experience. More information is located in [Understanding Conditional Logic](#) and [Applying Conditional Logic to Pages and Items](#).

## Why Are Some Form and Survey Options Not Discussed Here?

Some of the options for forms and surveys are only relevant for forms that are attached to an online registration, reservation, or donation. This document only discusses standalone forms and surveys.

# Before You Start

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## Planning Your Form or Survey

Before you start building a form or survey, you should know exactly what information you want to collect from the respondent and the most efficient way to collect it. Here are a few issues to consider when you're planning your form:

- Focus on the most important questions, and try to ask as few questions as possible.
- Organize your questions in a logical order.
- Make the form as simple as possible.
- Make the form as short as possible.
- Choose the right kind of item for the information you seek. For example, if the respondent must enter several lines of free-form text, use a multiple line text area. If the respondent should enter a date, use a single line text field and select **Date** as the answer format. Complete information is located in [Understanding Form and Survey Items](#).
- Break up the form in logical places. For short forms, use a horizontal rule to mark a new section. For longer forms, a page for each section might be appropriate.
- If your form is longer than one page, use the option to show form progress to give your respondents a visual indicator of how close they are to completing the form. More information is located in [Showing Form Progress](#).

## Converting Paper Forms

If you have a paper form that you use for this purpose, much of your preparation is already done. Carefully review the form to decide which online form features should be used for each section, and which unique features of online forms can streamline the experience. For example:

- If your form has a question to which the answer is “Yes” or “No,” configure that item as radio buttons to ensure that only one answer is selected.
- If a question contains several checkboxes from which the respondent may select several options, checkboxes on the form are an appropriate option.
- Use the answer format options to ensure that respondents enter information in the right format. For example, if you ask for an email address, you can configure a single-line text field that only accepts input in the correct format for an email address.

# Creating a Form or Survey and Editing Properties

---

This section covers the following topics:

- [Creating the Form or Survey](#)
- [Entering the Title and Description](#)
- [Basic Options](#)
- [Advanced Options](#)
- [Response Options](#)
- [Completion Options](#)
- [Saving Your Changes](#)
- [Editing Form Properties](#)

## Creating the Form or Survey

To create a form or survey, follow these steps:

1. In the Feature list, click **Forms and Surveys**. The Forms and Surveys page will be displayed.
2. To create a form for a different organization than the one displayed, select the organization from the menu.
3. Click **Create Form**. The Create Form page will be displayed.

*Create Form page*

The screenshot shows the 'Create Form' page with the following sections and fields:

- Title/Description:** Form Title: \* (text input), Description: (text area)
- Basic Options:** Item Label Position: Left (dropdown), Display in survey/form lists: Always (dropdown), Show Form Progress: (checkbox)
- Advanced Options:** Allow Users to Resume: (checkbox), Publish Form to Banner: (checkbox)
- Response Options:** Form Type: \* (dropdown, set to Anyone), Start Date: (date picker), End Date: (date picker), Max Respondents: (text input), Responses Per User: (text input)
- Reporting Options:** Privacy Level: All Results Private (dropdown)
- Completion Options:** Display Message: (text area, containing 'Thank you for completing the form.'), Redirect to URL: (text input), Email Responses to: (text input)

After you save the new form, you can modify these options on the Form Properties page.

## Entering the Title and Description

The title will be displayed in all links to the form/survey and within the form/survey itself. To enter the title and an optional description, follow these steps:

1. In the Form Title field, enter a meaningful name for the form.
2. In the Description field, enter a detailed description (optional).



## Basic Options

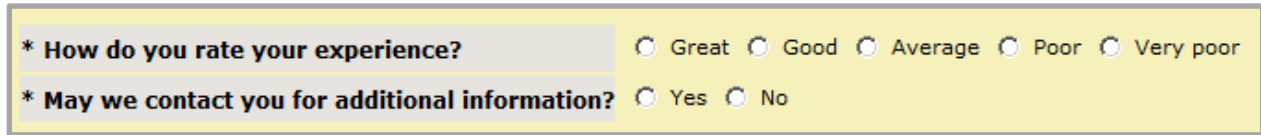
### Choosing Item Label Placement

The item label contains the instructional or question text that you enter for each item. For most forms and surveys, placement at the left (the default setting) is the best option.

If you wish to display the label at the top, follow this step in the Basic Options panel:

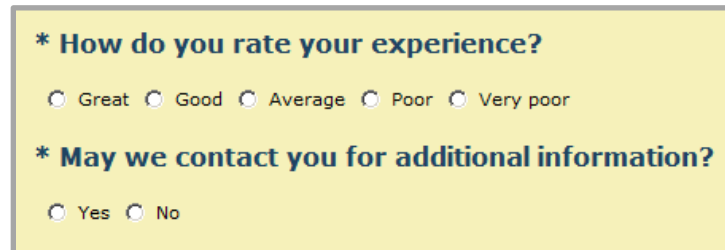
1. In the Item Label Position menu, select **Top**.

*Item labels displayed at left*



A screenshot of a form with two questions. The first question is "\* How do you rate your experience?" with radio buttons for "Great", "Good", "Average", "Poor", and "Very poor". The second question is "\* May we contact you for additional information?" with radio buttons for "Yes" and "No". The item labels are positioned to the left of the radio buttons.

*Item labels displayed at top*



A screenshot of a form with two questions. The first question is "\* How do you rate your experience?" with radio buttons for "Great", "Good", "Average", "Poor", and "Very poor". The second question is "\* May we contact you for additional information?" with radio buttons for "Yes" and "No". The item labels are positioned at the top of the form, above the radio buttons.

### Display the Form or Survey in Lists

To choose whether the form or survey is displayed in lists of forms and surveys, follow this step:

1. In the Display in Survey/Form Lists menu, select one of the following:
  - **Always**—The form or survey is always displayed in lists.
  - **Never**—The form or survey is never displayed in lists. This option is helpful if your organization has a large number of old forms and surveys that you don't want to delete but don't wish to display. You can view hidden forms and surveys by selecting **Display hidden surveys** on the Manage Forms page.

**NOTE:** The Visible for Admins Only option is only relevant for event registration forms.

### Showing Form Progress

For forms that are longer than one page, you can show the completing the form or survey. To display a progress gauge, follow this step in the Basic Options panel:

1. Select **Show Form Progress**.

**NOTE:** If your form or survey uses pages branching or conditional logic on pages, the progress gauge may not be accurate because the system can not determine how many pages are remaining for the respondent.

*When Show Form Progress is enabled, the respondent sees the current page and the total number of pages.*



2014 Member Satisfaction Survey

Page 2 of 4

Thank you for helping us serve you better!

\* How do you rate your experience?

Great  Good  Average  Poor  Very poor

## Advanced Options

### Allowing Respondents to Return to an Unfinished Form or Survey

You can allow respondents to return to and complete an unfinished form or survey. If you select this option, respondents who return to the form will be asked whether they wish to start a new form or resume the one that they already started. If you do not select this option, a respondent who leaves the form or survey without completing it will always have to restart the form or survey.

The feature requires that the following conditions be met:

- The form must contain more than one page. If you select this option for a form that contains only one page, returning respondents will not be asked if they want to resume.
- The respondent must have completed at least one page of the form and clicked **Continue**. If they choose to resume, the page following the last completed page will be displayed. If they have not submitted at least one page of information, the option to resume the form or survey will not be displayed.

To select this option, follow this step in the Advanced Options panel:

1. Select **Allow Users to Resume**.

### Publishing the Form or Survey to the Banner on Doubleknot Pages

You can display a link to the form or survey in the banner at the top of Doubleknot pages.

This option should not be used in the following circumstances:

- If you want to limit who can respond to the form or survey, do not select this option. Instead, email the link to the desired respondents.
- If you have placed restrictions on who can access the form or survey, do not select this option. (Information on this topic is located in [Choosing Who Can Access the Form or Survey](#).)

To publish the form or survey to the banner on Doubleknot pages, follow this step in the Advanced Options panel:

1. Select **Publish Form to Banner**.

**NOTE:** If you publish the form/survey to the banner, you must also set a state date and end date for the form. Information is located in [Choosing the Start and End Dates](#).

## Response Options

### Choosing Who Can Access the Form or Survey

By default, forms and surveys are available to the general public without requiring that they log on to Doubleknot. You can limit access to the form or survey to people with logon accounts for your organization or you can make it available to the general public. To choose who can access the form or survey, follow this step in the Response Options panel:

1. In the Who Can Complete menu, choose one of the following:
  - To allow anyone to complete the form or survey, select **Anyone**. (This is the default selection).
  - To limit the form or survey to respondents in your organization, select **My Organization Only**.

### Choosing the Start and End Dates

If you enter a start date for the form/survey, it will become available on that date. If you enter a start date, you may also enter an end date. The form will no longer be available after the end date. If the form was published to the banner, it will be removed on the end date.

To choose the start and end dates, follow these steps:

1. In the Start Date menus, select the month, day, and year that the form should become available.
2. In the End Date menus, select the month, day, and year for the form to stop being available.

### Setting the Maximum Number of Respondents

You can limit the number of respondents to the form. When the maximum number of respondents is reached, no one else may complete the form. To set the maximum number of respondents, follow this step:

1. In the Max Respondents field, enter the maximum number of respondents.

### Completion Options

When a respondent completes the survey, you can choose to display a message to the respondent or to redirect them to another web page. In addition, you can send an email that contains their responses to someone in your organization.

1. Select one of the following:
  - To display a message to respondents who complete the form or survey, enter the text in the Display Message field.
  - To redirect respondents to another web page after completing the survey, enter the complete URL (including http:// or https://) in the Redirect To URL field.

**NOTE:** If you enter a URL, the web page will be automatically be displayed when a respondent completes the survey. Any text in the Display Message field will be ignored.

2. To send an email whenever a respondent completes the survey, enter the email address in the Email Responses To field.

**NOTE:** To protect respondent confidentiality, the contents of single-line text areas and multiple-line text areas will never be included in the email. When you configure other kinds of items, you can choose whether the answer is included in the email or not.

### Saving Your Changes and Displaying the Current Form Page

To save your changes, follow this step:

1. Click **Submit**. The changes will be saved and the Current Form page for the form or survey you created will be displayed. The Current Form page allows you to access all features of the form or survey.

From the Current Form page, you can access all features for a form or survey.

Current Form: 2014 Member Satisfaction Survey	
<b>Status</b>	<input type="radio"/> Inactive <input checked="" type="radio"/> Active
<b>Management</b>	<a href="#">Edit Form</a> <a href="#">Form Properties</a> <a href="#">Set Score Messages</a>
<b>General</b>	<b>Owner:</b> San Jose Zoo <b>Start Date:</b> n/a <b>End Date:</b> n/a <b>Items:</b> 28 <b>Pages:</b> 5
<b>Results</b>	<b>Responses:</b> 12 <a href="#">View Reports</a> <a href="#">Delete Results</a>
<b>URL to Complete Form</b>	<a href="http://www.doubleknot.com/survey/2014-member-satisfaction-survey/24324">http://www.doubleknot.com/survey/2014-member-satisfaction-survey/24324</a>
<input type="button" value="Done"/>	

## Setting the Form as Active or Inactive

When you create a new form or survey, you should immediately set it as inactive so that visitors to your site don't try to complete the form or survey before it is ready to be published. When the form is fully tested and ready to publish, set the form as active.

To set the form as active, follow these steps on the Current Form page.

1. In the Status section, select one of the following:
  - **Inactive**—The form or survey is not visible to people who do not have Doubleknot administrative account.
  - **Active**—The form or survey can be viewed by anyone who has access to it, including visitors to your web site. If you chose to publish the form to the banner, it will be displayed in the banner according to the date range you selected in [Choosing the Start and End Dates](#).
2. Click **Done**.

**NOTE:** After you have finished testing and correcting the form or survey, you must set the form as active.

## Editing Form Properties

You may change any of these options at a later time. To return to this page, follow this step:

1. On the Forms and Surveys page, click **Manage Forms**. The Manage Forms page will be displayed
2. If the form you wish to edit is hidden, select **Display Hidden Surveys**. (Information about hidden surveys is located in [Display the Form or Survey in Lists](#).)
3. Locate the form or survey you wish to modify, and click **Edit**. The Current Form page will be displayed.
4. Click **Form Properties**. The Form Properties page will be displayed with the information you entered on the Create and Modify page.
5. Change the desired information and settings.
6. Click **Save**. A confirmation dialog box will be displayed.
7. Click **OK**. The changes will be saved and the Current Form page will be displayed

# Working With Form and Survey Items

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This section contains general instructions for working with items on a form or survey page. Complete information about items and associated options is located in [Configuring Form and Survey Items](#).

This section covers the following topics:

- [Adding an Item to a Page](#)
- [Moving Items on a Page](#)
- [Editing an Item](#)
- [Copying an Item](#)
- [Moving an Item to Another Page](#)
- [Deleting an Item](#)

## Adding an Item to a Page

When you create a new form or survey or add a page to an existing form or survey, the Add Item to Form page will be displayed so you can create the first item on the page.

To create a new item on existing page, follow this step:

1. Click **Add Item to Page**. The Add Item to Form page will be displayed.
2. In the Item Type menu, select the type of item you wish to create. The page will redisplay with options for the type of item.
3. Follow the steps in [Configuring Form and Survey Items](#) to configure the item.
4. Click **Add Item**. The item will be created and displayed at the bottom of the page.

## Moving Items on a Page

To move an item on the page, click the Up or Down arrows at the left side of the item.

## Editing an Item

To edit an existing item on a page, follow these steps:

1. At the right side of the item, click **Edit Item**. The Edit Item page will be displayed.
2. Modify the information as desired. (You can even change the item to a different type.) Complete information about configuring different items is located in [Configuring Form and Survey Items](#).
3. Click **Submit Changes**. A confirmation dialog box will be displayed.
4. Click **OK**. Your changes to the item will be saved.

**WARNING:** Editing an item can cause any conditional logic depending on that item to fail. If you edit an item whose answers are used in conditional logic, be sure to check page and item conditions that depend on the edited item and modify them as needed.

## Copying an Item

When you copy an item, you can place it on the same page or copy it to another page. To copy an item to another page, follow these steps:

1. At the right side of the item, click **Copy Item**.
2. In the Copy to Page menu, select the page where you wish to copy the item.
  - If you select page that you're on, a copy of the item will be created at the bottom of the same page.
  - If you select **New Page**, a new page containing the item to the end of the form or survey.
3. Click **Copy Item**. The page you selected will be displayed and the copied item will be at the bottom of the page. You can move the item on the page using the up and down arrows at the left side of the item.

## Moving an Item to Another Page

When you move an item to another page, it is removed from the originating page and is placed at the bottom of the selected page. To move an item, follow these steps:

1. At the right side of the item, click **Move to Page**.
2. In the Page menu, select the page where you wish to move the item. If you select **New Page**, a new page containing the item will be added to the end of the form or survey.
3. Click **Move to Page**. The page you selected will be displayed and the copied item will be at the bottom of the page. You can move the item on the page using the up and down arrows at the left side of the item.

**WARNING:** Moving an item to another page can cause conditional logic that depends on that item to fail. If you edit an item whose answers are used in conditional logic, be sure to check page and item conditions that depend on the edited item and modify them as needed.

## Deleting an Item

To delete an item, follow these steps:

1. At the right side of the item, click **Delete Item**. A confirmation dialog box will be displayed.
2. Click **OK**. The item will be deleted. If it was the only item on a page, the page will also be deleted. Any page conditions or item conditions that depended on the deleted item will be removed.

**WARNING:** If you delete an item from a published form or survey that already has responses, all the responses for the item will also be deleted.

# Configuring Form and Survey Items

This section explains the purpose and options for each item that can be used on a form or survey. Instructions on adding, editing, moving, copying, and deleting items are located in [Working With Form and Survey Items](#).

The following topics are covered in this section:

- [Items Where Respondents Select Answers](#)
- [Items Where Users Enter Answers or Information](#)
- [Design Elements](#)
- [Adding Captcha Verification](#)

## About the Reporting Label Field

The Reporting Label Field is an optional field on survey items where respondents select or enter answers. In the Reporting Label field, you can enter a short description for the results that will be used as the column header in survey reports. The text in the Reporting Label field is not displayed to respondents.

If you leave the Reporting Label field blank, the contents of the Question Text field will be used as the column header in survey reports. If the question text is lengthy, we recommend that you enter a brief, meaningful description in the Reporting Label field so that a reasonably sized column header is displayed in your reports.

## Items Where Respondents Select Answers

This section covers form and survey items where respondents select from a predefined list of answers.

### When Should I Use Checkboxes, Dropdown Menus, and Radio Buttons?

The following table describes when to use checkboxes, drop-down menus, and radio buttons.

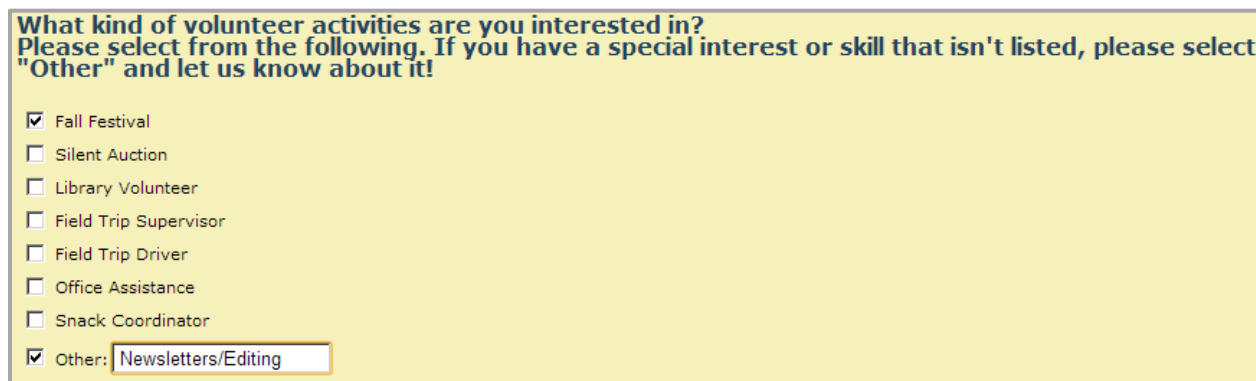
If the respondent should...	Use this item type:
Choose more than one item	Checkboxes
Select one item from a relatively short list	Radio buttons
Select one item on a ranking scale	Radio buttons
Select one item from several related choices	Drop-down menu

### Checkboxes

#### Description

Checkboxes allow you to gather multiple answers to the same question. For example, if you are asking the respondent about their hobbies or about medical conditions and allergies, you can list the most common answers as checkboxes that can be selected.

*Example: Checkboxes allow respondents to select more than one option*



**What kind of volunteer activities are you interested in?**  
Please select from the following. If you have a special interest or skill that isn't listed, please select "Other" and let us know about it!

- Fall Festival
- Silent Auction
- Library Volunteer
- Field Trip Supervisor
- Field Trip Driver
- Office Assistance
- Snack Coordinator
- Other:

## Configuration

To configure checkboxes, follow these steps:

1. In the Item Type menu, select **Checkboxes**. The page will redisplayed with options for checkboxes.
2. By default, you can enter up to ten checkbox items on the page. If you want to display more checkboxes, enter the number in the Number Answer Inputs field and click **Change**.  
**NOTE:** If you've already entered ten answers and you realize you need to enter more, save the item before changing the number of answer input fields. If you change the number of input fields without saving your entries, the answers you've entered will be lost.
3. In the Question Text field, enter the question to display.
4. In the Sub Text field, enter additional text. (This item is optional.)
5. For each checkbox you wish to display, follow these steps in the Answers section:
  - In the Answer Text field, enter the text to display next to the checkbox.
  - If the answer should be selected by default, select the box in the Checked? column. Respondents may deselect the answer.
6. To allow respondents to enter their own answers, follow these steps:
  - Select **Allow "Other"?**
  - In the "Other" Text field, enter the text to display for the Other checkbox.
7. To display the checkboxes in a random order each time the page is displayed, select **Randomize Answer Order**.
8. If the checkboxes should be numbered, select **Number Labels**.
9. To set the maximum number of checkboxes that a respondent can select, enter the number in the Maximum to Choose field. (Be sure to let respondents know how many answers they can select in the Question Text or Sub Text fields.)
10. To require respondents to select a minimum number of checkboxes, enter the number in the Minimum to Choose field. Be sure to let respondents know the minimum number of answers they can select in the Question Text or Sub Text fields.)  
**NOTE:** To require the respondent to select at least one checkbox, enter **1** in the Minimum to Choose field.
11. To include the responses to this item in a notification email, select **Allow answer to be included in emails** in the E-mail Restriction section. (Information on the notification email is located in [Setting Completion Options](#).)
12. In the Reporting Label field, enter a short meaningful name to use in the column header for this item in a report.
13. Click **Add Item**. The page on which you created the checkboxes will be displayed, and the checkboxes will be the last item on the page.

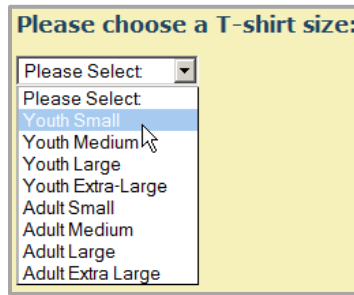
## Dropdown Menu

### Description

A dropdown menu presents the respondent with a list of items to choose from. Only one item can be selected. Dropdown menus are a good choice if respondents must select a single item from a long list of options.



### Example: Drop-down menu



#### Configuration

To configure a dropdown menu, follow these steps:

1. In the Item Type menu, select **Dropdown Menu**. The page will redisplayed with options for dropdown menus.
2. By default, you can enter up to ten items in a dropdown menu. If you want to display more items in the menu, follow these steps:
  - Enter the number in the Number Answer Inputs field
  - Click **Change**.

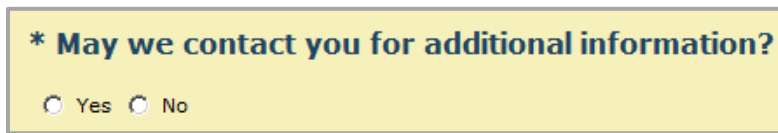
**NOTE:** If you've already entered ten answers and you realize you need to enter more, save the item before changing the number of answer input fields. If you change the number of input fields without saving your entries, the answers you've entered will be lost.

3. In the Question Text field, enter the question to display.
4. In the Sub Text field, enter additional text. (This item is optional.)
5. If you want to display the same answers as another dropdown in the form or survey, skip the Answer Text fields and select the item whose answers you wish to use in the Same Answers As: menu.
6. For each answer to display in the drop-down menu, follow these steps in the Answers section:
  - In the Answer Text field, enter the text to display for the menu item.
  - If an answer should be selected by default, select the box in the Default? column. Respondents may select another item.
7. If the respondent must answer the question, select **Answer is Required**.
8. To allow respondents to enter their own answers, follow these steps:
  - Select **Allow "Other"?**
  - In the "Other" Text field, enter the text to display for the Other checkbox.
9. To display the checkboxes in a random order each time the page is displayed, select **Randomize Answer Order**.
10. To include the responses to this item in a notification email, select **Allow answer to be included in emails** in the E-mail Restriction section. (Information on the notification email is located in [Setting Completion Options](#).)
11. In the Reporting Label field, enter a short meaningful name to use in the column header for this item in a report.
12. Click **Add Item**. The page on which you created the dropdown menu will be displayed, and the dropdown menu will be the last item on the page.

#### Radio Buttons

Radio buttons require the respondent to choose one item from a displayed list. If another item is selected, the first item becomes deselected. Radio buttons are best used for yes/no questions, for selecting from long lists where it's helpful to see all the items at once, or to set up a ranking scale. For each radio button item, you can choose to lay out the answers horizontally or vertically.

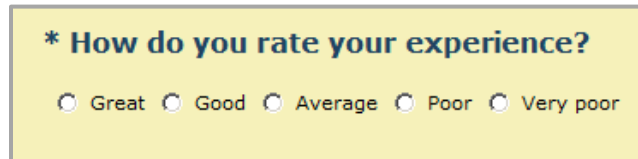
*Radio buttons used for Yes/No (horizontal layout)*



\* **May we contact you for additional information?**

Yes  No

*Radio buttons used to set up a ranking scale (horizontal layout)*



\* **How do you rate your experience?**

Great  Good  Average  Poor  Very poor

*Radio buttons allowing you to select a single item from a long list (vertical layout).*



\* **What was your favorite activity?**

Community service

Crafting

Hiking

Kayaking

Folklore

Cooking

Animal care

Historical studies

Other:

#### *Configuration*

To configure radio buttons, follow these steps:

1. In the Item Type menu, select **Radio Button**. The page will redisplayed with options for radio buttons.
2. By default, you can enter up to ten radio buttons. If you want to display more radio buttons, follow these steps:
  - Enter the number in the Number Answer Inputs field.
  - Click **Change**.

**NOTE:** If you've already entered ten answers and you realize you need to enter more, save the item before changing the number of answer input fields. If you change the number of input fields without saving your entries, the answers you've entered will be lost.

3. In the Question Text field, enter the question to display.
4. In the Sub Text field, enter additional text. (This item is optional.)
5. If you want to display the same answers as another set of radio buttons in the form or survey, skip the Answer Text fields and select the item whose answers you wish to use in the Same Answers As: menu.
6. For each answer to display in the drop-down menu, follow these steps in the Answers section:
  - In the Answer Text field, enter the text to display next to the radio button.
  - If an answer should be selected by default, select the box in the Default? column. Respondents may select another item.
7. If the respondent must answer the question, select **Answer is Required**.
8. To allow respondents to enter their own answers, follow these steps:
  - Select **Allow "Other"?**
  - In the "Other" Text field, enter the text to display for the Other radio button.

9. To display the checkboxes in a random order each time the page is displayed, select **Randomize Answer Order**.
10. In the Answer Layout Style menu, choose how the radio buttons should be displayed:
  - To display the buttons horizontally select **Horizontal** (this is the default setting).
  - To display the buttons vertically, select **Vertical**.
11. To include the responses to this item in a notification email, select **Allow answer to be included in emails** in the E-mail Restriction section. (Information on the notification email is located in [Setting Completion Options](#).)
12. In the Reporting Label field, enter a short meaningful name to use in the column header for this item in a report.
13. Click **Add Item**. The page on which you created the radio buttons will be displayed, and the radio buttons will be the last item on the page.

## Universal List

### Description

The universal list item allows the respondent to select from a dropdown menu containing a set of predefined lists.

*Universal list of states*

The image shows a form with three fields: \* City, \* States, and \* ZIP. The City field contains 'San Francisco'. The States dropdown menu is open, displaying a list of states from Alabama to Maine. 'California' is highlighted. The ZIP field is empty.

### Configuration

To configure a universal list item in your form or survey, follow these steps:

1. In the Item Type menu, select **Universal List**. The page will redisplayed with options for universal lists.
2. In the Question Text field, enter the question to display.
3. In the Sub Text field, enter additional text. (This item is optional.)
4. If the respondent is required to answer this question, select **Answer is Required**.
5. In the Select Drop Down List menu, select the type of universal list:
  - **Contacts**—The types of contacts defined for your organization
  - **Country**—A list of countries
  - **State**—A list of United States and Canadian territories
  - **Suffix**—Common suffixes for last names
  - **Title**—Common professional titles

**NOTE:** If your organization has configured additional universal lists, you may select them here.

6. To set a default value for the item, enter it in the Other Options field.

7. In the Reporting Label field, enter a short meaningful name to use in the column header for this item in a report.
8. Click **Add Item**. The page on which you created the universal list will be displayed, and the universal list will be the last item on the page.

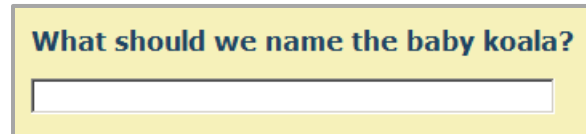
## Items Where Respondents Enter Information or Answers

### Single-Line Text Area

#### *Description*

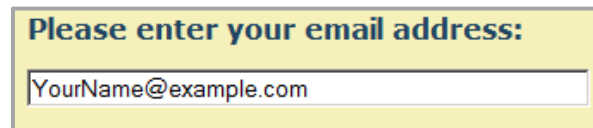
A single-line text area allows respondents to enter their own short answer to the question. You can limit the response to a specific format to ensure that respondents enter valid information.

*Single-line text field with no restrictions on answer format*



What should we name the baby koala?

*A single-line text field for email address should be formatted to accept valid email addresses only. In this example, the form's creator entered a sample email address as the default value.*



Please enter your email address:

#### *Configuration*

To configure a single-line text area item, follow these steps:

1. In the Item Type menu, select **Single Line Text Area**. The page will redisplayed with options for single-line text areas.
2. In the Question Text field, enter the question to display.
3. In the Sub Text field, enter additional text. (This item is optional.)
4. If the respondent is required to answer this question, select **Answer is Required**.
5. If there is a required format for the answer, select it from the Required Answer Format menu:
  - **Numbers Only**—The response must be numerical.
  - **Integers Only**—The response must be integers (no decimals or other characters).
  - **Money - \$nn.nn**—The response must be formatted in dollars and cents.
  - **E-mail Address Only**—The response must be a valid email address.
  - **Limited Number of Characters**—The response may only contain the number of characters that you specify.
  - **Date (MM/DD/YYYY)**—The response must be a valid date.
6. If you chose a numeric option and want to set a minimum value, enter it in the Minimum Value field. Answers less than the minimum value will generate an error message.
7. If you chose a numeric option and want to set a maximum value, enter in Maximum Value field. Answers greater than the maximum value will generate an error message.
 

**NOTE:** If you use these options, use the Question Text or Sub Text fields to let the respondents know the minimum and/or maximum values for the item.
8. If you want to display a default value or information in the field, enter it in the Default Value field.

**NOTE:** If you enter a default value that is not the same format that you selected in Required Answer Format, respondents who do not overwrite the default value will receive an error message when they click **Continue**.

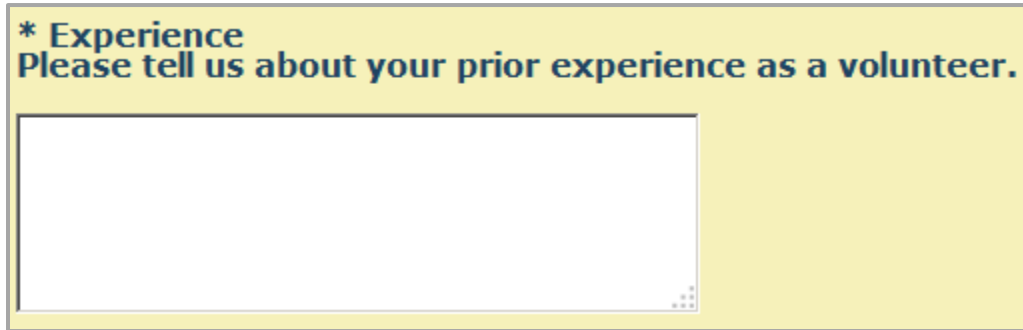
9. In the Reporting Label field, enter a short meaningful name to use in the column header for this item in a report.
10. Click **Add Item**. The page on which you created the single-line text area will be displayed, and the single-line text area will be the last item on the page.

### Multiple-Line Text Area

#### *Description*

The multiple-line text area allows the respondent to enter several lines of text.

*Example: Multiple line text area*



#### *Configuration*

To configure a multiple-line text area, follow these steps:

1. In the Item Type menu, select **Multiple Line Text Area**. The page will redisplayed with options for single-line text areas.
2. In the Question Text field, enter the question to display.
3. In the Sub Text field, enter additional text. (This item is optional.)
4. If the respondent is required to answer this question, select **Answer is Required**.
5. If you want to display a default value or information in the field, enter it in the Default Value field.
6. In the Reporting Label field, enter a short meaningful name to use in the column header for this item in a report.
7. Click **Add Item**. The page on which you created the multiple-line text area will be displayed, and the multiple-line text area will be the last item on the page.

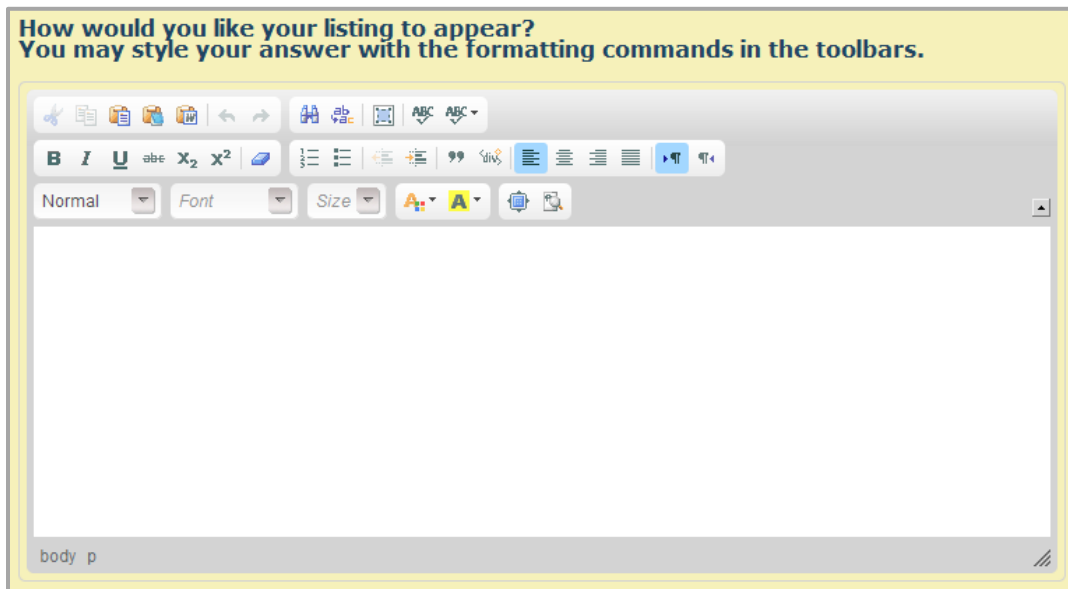
### Rich Text

#### *Description*

This item displays a rich text editor window on the form in which the respondent can enter and format text. The rich text editor window has a subset of the features available in the standard Doubleknot rich text editor window—for example, the options to view the HTML source or insert pictures or links are not available.

In reports, the responses to rich text items will be displayed as HTML code and not as formatted rich text.

## Rich text window displayed to a respondent



### Configuration

To configure a rich text item, follow these steps:

1. In the Item Type menu, select **Rich Text**. The page will be redisplayed with options for a rich text item.
2. In the Question Text field, enter the question to display.
3. In the Sub Text field, enter additional text. (This item is optional.)
4. If the respondent is required to answer this question, select **Answer is Required**.
5. If you want to display a default value or information in the rich text window, enter it in the Default Value field.
6. In the Reporting Label field, enter a short meaningful name to use in the column header for this item in a report.
7. Click **Add Item**. The page on which you created the rich text item will be displayed, and the rich text item will be the last item on the page.

### Date

#### Description

Date fields allow the respondent to enter a date by selecting the month, day, and year from drop-down menus.

#### Example: Date field

### Configuration

To configure a date item, follow these steps:

1. In the Item Type menu, select **Date**. The page will be redisplayed with options for a date item.
2. In the Question Text field, enter the question to display.
3. In the Sub Text field, enter additional text. (This item is optional.)
4. If the respondent is required to answer this question, select **Answer is Required**.
5. To display a default date to the respondent, select the default month, day, and year in the Default Date menus.

6. To set the earliest date that a respondent may enter, select the month, day, and year in the Earliest Date Allowed menus.
7. To set the latest date that a respondent may enter, select the month, day, and year in the Last Date Allowed menus.

**NOTE:** If you accept the defaults, the earliest year displayed to respondents in the Year menu will be 1900 and the last date displayed to respondents in the Year menu will be 2999. To reduce the number of entries in the year menu, choose earliest and last dates allowed that make sense for your form.

8. To include the responses to this item in a notification email, select **Allow answer to be included in emails** in the E-mail Restriction section. (Information on the notification email is located in [Setting Completion Options](#).)
9. In the Reporting Label field, enter a short meaningful name to use in the column header for this item in a report.
10. Click **Add Item**. The page on which you created the item will be displayed, and the item will be the last item on the page.

## Design Elements

Design elements do not solicit input from respondents. They are used to create logical sections or to display styled text, images, or information on the page.

### Header

#### *Description*

The header item displays a text header and subheader. Use this item to introduce new sections on a page.

*Header text used to indicate a new topic on the page.*

**This is how header text appears on the page.**  
**This is how "sub text" appears on the page**

#### *Configuration*

To add a header, follow these steps:

1. In the Item Type menu, select **Header**. The page will redisplay with options for a header item.
2. In the Header Text field, enter the main header text.
3. In the Sub Text field, enter the text for the subheader.
4. Click **Add Item**. The page on which you created the header will be displayed, and the header will be the last item on the page.

### Horizontal Line

#### *Description*

The horizontal line adds a thin line across the page. This item is frequently used to separate sections of a form.

*The horizontal line separates logical sections on the page. In this example, the line appears above the Volunteer Interests section.*



The screenshot shows a form with a yellow background. It contains three sections. The first section is titled '\* Name:' and has a text input field. The second section is titled '\* When is your birthday? You must be over 18 to participate.' and has three dropdown menus. A horizontal line is positioned below the birthday section and above the third section. The third section is titled '\* What was your favorite activity?' and contains a list of radio button options: Community service, Crafting, Hiking, Kayaking, Folklore, Cooking, Animal care, Historical studies, and Other: (with a text input field).

### *Configuration*

To add a horizontal line, follow these steps:

1. In the Item Type menu, select **Horizontal Line**. The page will redisplay with options for a header item.
2. Click **Add Item**. The page on which you created horizontal line will be displayed, and the horizontal line will be the last item on the page.

## **HTML**

### *Description*

This allows you to enter HTML display on the form. For example, you can include a link to another web page, include text and images together, or embed a link to a YouTube video.

**NOTE:** If you want the respondent to enter styled text, create a Rich Text item. Information is located in the [Rich Text](#) section of [Items Where Users Enter Answers or Information](#).

### *Configuration*

To place HTML on the page of a form, follow these steps:

1. In the Item Type menu, select **HTML**. The page will redisplay with an editing window for HTML.
2. Enter and format the information you wish to display.
3. Click **Add Item**. The page on which you created the HTML item will be displayed, and the HTML item will be the last item on the page.

## **Image**

### *Description*

This item allows you to place an image on the form. For example, you may want to include your organization's logo or the logo for a special event. If you want the image placed on every page of the form, remember to copy the item to each page.

**NOTE:** This feature will place the image at its original size centered in its location on the page. For greater control over the image display, including the ability to display alternate text, create an HTML item and insert the image there. Information is located in the [HTML](#) section of [Design Elements](#).

### *Configuration*

To place an image in the form, follow these steps:

1. In the Item Type menu, select **Image**. The page will redisplay with options for images.
2. To link to an image, enter its URL in the URL field.



3. To upload an image:
  - Click **Find an Image**.
  - Click **Upload**.
  - Locate and select the image you wish to upload.
  - Click **Open**. The image will be added to the server
  - Double-click the image. The file path will be displayed in the URL field.
4. To use an image that already been uploaded:
  - Click **Find an Image**.
  - Navigate to the location on the server where the image is stored.
  - Double-click the image. The file path will be displayed in the URL field.
5. Click **Add Item**. The page on which you created the image will be displayed, and the image will be the last item on the page.

## Message

### Description

The Message item displays plain text centered on the page. If you want to display styled text in different fonts, sizes, formats or colors, create an HTML item containing the text instead. Information is located in the [HTML](#) section of [Design Elements](#).

### Configuration

To place a message in the form, follow these steps:

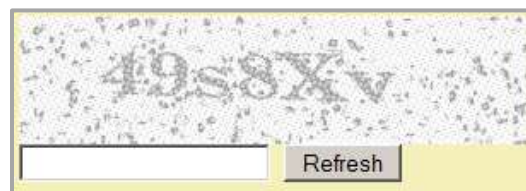
1. In the Item Type menu, select **Message**. The page will redisplay with a field for the message.
2. In the Message field, enter the text.
3. Click **Add Item**. The page on which you created the message will be displayed, and the message will be the last item on the page.

## Adding Captcha Verification

### Description

A Captcha confirms that the respondent is a human and not a computer. Using a Captcha reduces the chance of spam or junk responses to your form or survey. To submit responses, the respondent must correctly enter the characters that are displayed in a unique image on the form.

### Sample Captcha



### Configuration

To create a Captcha, follow these steps:

1. In the Item Type menu, select **Captcha**. The page will redisplayed with options for Captcha.
2. In the Captcha Text field, enter text asking the respondent to complete the Captcha (for example, "Please type the characters you see below.").
3. In the Sub Text field, enter additional text. (This item is optional.)
4. Do not change the default setting for **Answer is Required**. If you're using Captcha, it should always be required.
5. In the Number of Characters Displayed menu, select the number of characters to display. Shorter Captchas are less secure, while longer Captchas are more difficult for respondents.

6. In the Display Characters field, choose one of the following:
  - **Letters and Numbers**
  - **Letters Only**
  - **Capital Letters Only**
  - **Numbers Only**
7. Click **Add Item**. The page on which you created the Captcha will be displayed, and the Captcha will be the last item on the page.

# Working With Form and Survey Pages

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The following topics are covered in this section:

- [Adding a Page](#)
- [Displaying a Page](#)
- [Copying a Page](#)
- [Moving a Page](#)
- [Deleting a Page](#)
- [Saving Your Changes and Returning to the Current Form Page](#)

## Adding a Page

When you add a page to a survey, you must create at least one item that appears on the page at the same time. To add a page to a survey, follow this step:

1. Click **Add Page**.
2. From the Item Type menu, choose an item to appear on the page. The Add Item to Form page will be displayed.
3. Enter information for the item. (Complete information is located in [Configuring Form and Survey Items](#).)
4. At the bottom of the page, click **Add Item**. The new page will be created as the last page in the form or survey and the options to edit the page will be displayed.

## Displaying a Page

To display a page of the form or survey, follow these steps:

1. In the page number menu at the top left, select the desired page.
2. Click **Go to Page**. The selected page will be displayed.

## Copying a Page

To copy a page, follow these steps:

1. Display the page you want to copy.
2. Click **Copy Page**. A confirmation dialog box will be displayed.
3. Click **OK**. The page will be added as the last page. Follow the steps in [Moving a Page](#) to move the new page to the desired location.

## Moving a Page

To move a page to a new location, follow these steps:

1. Display the page you wish to move.
2. Click **Move Page**.
3. In the Location section, select **Before** or **After**.
4. In the Page menu, select the page that the current page should be moved before or after.
5. Click **Move Page**. The page will be moved to the specified location. The page that you moved will still be displayed.

## Deleting a Page

Before you delete a page, check to see if the page you're deleting meets any of the following conditions:

- Is the page is a landing page for page branching? (For more information, see [Skipping Pages with Page Branching](#)).
- Does the page contain items whose responses are required for conditional logic that appears on later pages? (For more information, see [Applying Conditional Logic to Pages and Items](#).)
- Do items on other pages contain conditional logic that would result in the display of the page? (For more information, see [Applying Conditional Logic to Pages and Items](#).)

If you delete a page that uses conditional logic or page branching, the conditions related to the delete page or items on the deleted page will be removed from the other dependent pages or items. Be sure to revise related pages and items so that they display correctly.

To delete a page, follow these steps:

1. Display the page you wish to delete.
2. Click **Delete Page**. A confirmation dialog box will be displayed.
3. Click **OK**. The page will be deleted. Any conditions or branching on other pages that related to the deleted page will be removed.

## Saving Your Changes and Returning to the Current Form Page

To save your changes to the form, follow this step:

1. At the bottom of any page, click **Continue**. Your changes will be saved and the Current Form page will be displayed.

# Skipping Pages with Page Branching

---

This section covers the following topics:

- [About Page Branching](#)
- [Setting Up Page Branching](#)
- [Removing Page Branching](#)

## About Page Branching

Page branching is a simple way to display a page based on the response to a previous question. Page branching does not support logical operators—you simply select the question and answer that will cause the branched page to be displayed.

## Setting Up Page Branching

To set up page branching, follow these steps:

1. Create the landing page that will be displayed based on the response.
2. On the page that you wish to branch *from*, click **Page Branching**. Options to configure page branching will be displayed.
3. In the Question to Branch Off Of menu, select the question on which the branching is based.
4. In the Branch if Response Is menu, select the response that will cause the branching.
5. In the Go To Page menu, select the page to display.
6. Click **Add Branch**. The branch will be saved and the current branching rules will be displayed at the bottom of the page.
7. Choose one of the following:
  - If you want to add another branching condition, click **Add Branch** and follow steps 3-6.
  - If you're finished configuring branching for the current page, click **Save and Continue**.

*Configuring page branching: If a respondent indicates no interest in volunteering, page 3 will automatically be displayed.*

The screenshot shows a web interface titled "Branching For Page 1" with a yellow background. At the top left is a "Save & Continue" button. Below it, the text "Add New Branching Rule" is followed by a form. The form has three rows: "Question to branch off of:" with a dropdown menu showing "What are your interests?"; "Branch if response is:" with a dropdown menu showing "I'm not interested in voluntee..." and an "Other:" text input field; and "Go to page:" with a dropdown menu showing "3". At the bottom of the form is an "Add Branch" button with a mouse cursor pointing to it.

## Removing Page Branching

To remove a page branching rule, follow these steps on the Page Branching page:

1. At the right of the rule you want to remove, click **Delete**. A confirmation dialog box will be displayed.
2. Click **OK**. The branching rule will be removed.

# Understanding Conditional Logic

---

This section covers the following topics:

- [About Conditional Logic in Doubleknot](#)
- [Understanding Page Conditions and Item Conditions](#)
- [Operators and Values](#)
- [Groups in Conditional Logic](#)
- [Preparing to Add Conditional Logic](#)

## About Conditional Logic in Doubleknot

Conditional logic allows you to display or hide items in your form based on your answers to previous items. Conditional logic ensures that respondents only see the questions that are relevant to them and makes it easier for them to complete the form or survey.

For example, if you were seeking feedback about an event, you could ask whether the respondent was satisfied with the event. If the respondent was satisfied, you could ask what their favorite part of the event was. If the respondent was not satisfied, you could ask specific questions to identify their issues and ideas for improvements. The respondent would only be presented with questions that were appropriate based on their earlier answers.

**NOTE:** If you use conditional logic in a form or survey, it is crucial that you fully test it before releasing the form or survey to the public. Keep notes about the page and item conditions (or print a screen shot of the conditions for each page or item) and test each possible answer and combination of answers to make sure the right pages and questions are displayed. Information about testing is located in [Testing Forms and Surveys](#).

## Understanding Page Conditions and Item Conditions

There are two kinds of conditional logic used in Doubleknot:

- **Page conditions** control when an entire page is displayed. Additional conditions can apply to individual items on the page.
- **Item conditions** control when an individual items on a page are displayed.

## Operators and Values

When you set up conditional logic for an item or a page, you'll choose three things:

- The *question* that the condition is based on.
- The *value*, which is the respondent's answer to the question.
- The *operator*, which connects the question and the value.

For example, consider a survey question "Were you happy with the results?" that has two possible answers: "Yes" and "No." To display a follow-up page of questions only to people who answered "No," the logic for the page conditions would be:

Question:	Were you happy with the results?
Operator:	Equals
Value:	No

## About Operators

The following operators are available:

- **Equals:** The response equals the selected value.
- **Does Not Equal:** The response does not equal the selected value.
- **Is Greater Than:** The response is greater than the number specified in the value.
- **Is Less Than:** The response is less than the number specified in the value.
- **Contains:** The response contains the value.
- **Does Not Contain:** The response does not contain the specified value.
- **Answered Question:** The respondent answered the question.
- **Did Not Answer Question:** The respondent did not answer the question.

**NOTE:** Depending on the type of item, some operators may not be relevant. For example, “Is greater than” and “Is Less Than” do not apply to answers that are text, and “Answered Question” or “Did Not Answer Question” are not relevant for questions that the respondent is required to answer.

## About Values

The following table describes the types of values that available for different kinds of questions.

**NOTE:** If you choose **Answered Question** or **Did Not Answer Question** as the operator, any value you select is ignored—the system will apply the condition based on whether the question was answered or not.

<b>If the question that the condition is based on contains...</b>	<b>The options for values will include:</b>
Radio buttons	<ul style="list-style-type: none"><li>• Each possible answer</li><li>• If “Other” was an option, the text that the respondent entered</li></ul>
Checkboxes	<ul style="list-style-type: none"><li>• Each individual answer</li><li>• A specific number of answers (e.g., if the respondent answered 3 out of 7 possible answers)</li><li>• If “Other” was an option, the text that the respondent entered</li></ul>
Items where the respondent enters answers (single-line text field, multiple-line text area, date, etc.)	<ul style="list-style-type: none"><li>• The value menu is blank</li><li>• If you enter text or numbers that match the required format in the Other field, the selected operator will be applied to that value</li></ul>

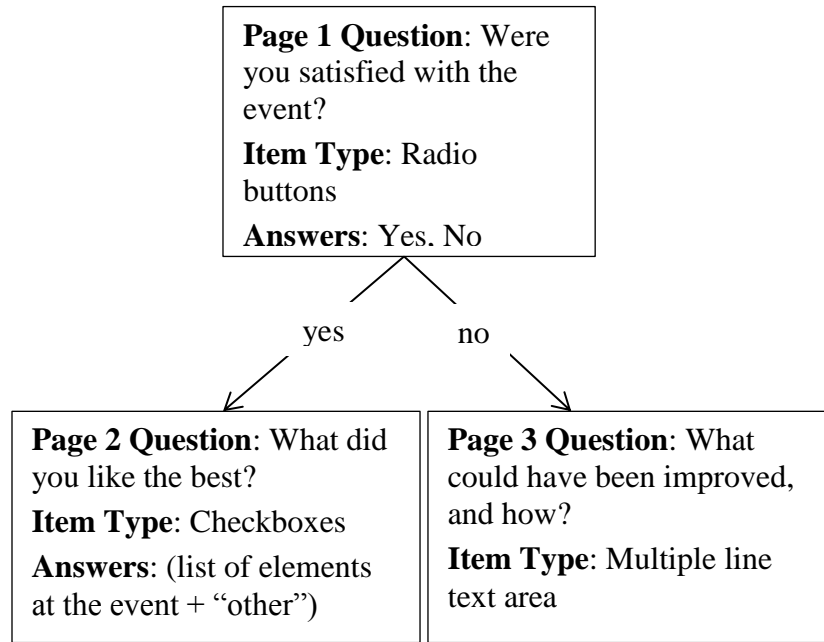
## Groups in Conditional Logic

If you apply more than one condition to a page or item, you can choose to place conditions together in a group. If you place two or more conditions in a group, both conditions must be met for the page or item to be displayed. If you do not group conditions together, then only one condition must be met for the page or item to be displayed.

## Preparing to Add Conditional Logic

Before you add conditional logic to a form or survey, we strongly recommend that you draw a chart that describes each element so that you understand the entire logical flow before you start building the form. This will make it easier to set up the conditional logic and to test the form or survey when it’s completed. For example, the simple event feedback form would have a diagram similar to the following.

*Before you add conditional logic, create a simple chart that describes the logical flow of your form or survey.*



Information about testing forms and surveys is located in [Testing Forms and Surveys](#).



# Applying Conditional Logic to Pages and Items

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An overview of conditional logic is located in [Understanding Conditional Logic](#). This section contains instructions for applying conditional logic to forms and surveys. The following topics are covered:

- [Conditional Logic Overview](#)
- [Working With Page Conditions](#)
- [Working with Item Conditions](#)

## Conditional Logic Overview

The general steps to use conditional logic are the following:

- Create the item that the conditional logic is based on. For example, for the item “Were you satisfied with the event?”, you’d create an item containing radio buttons for “Yes” and “No.”
- Create the **landing page(s)** that will be displayed based on the respondent’s answers.
- Apply the page conditions and/or item conditions.
- Add items to the page.
- If some items should be displayed or hidden depending on the response to previous questions, set up the item conditions for each item/

## Working With Page Conditions

Follow the steps in this section to add conditional logic to a page.

### Creating the Item that Page Conditions Are Based On

Before you can create page conditions, you must create the item that the page conditions are based on. Follow the steps in [Configuring Form and Survey Items](#) to create the item that the page conditions will be based on.

### Creating the Landing Page

To create the landing page, follow these steps:

1. Click **Add Page**. A new page will be created and the Add Item to Form options will be displayed.
2. Add at least one item to the page. (You can return and add more items later.) When you have added the item, the overview for the new page will be displayed and the Page Conditions button will be visible.
3. Click **Page Conditions**. The conditions for the page will be displayed.
4. Choose one of the following:
  - If you want to create a new condition, follow the steps in [Creating a Page Condition](#).
  - If you want to use an existing condition, follow the steps in [Applying an Existing Page Condition](#).

### Creating a Page Condition

To create a page condition, follow these steps in the Create New Condition panel:

1. In the Question menu, select the question that controls whether the page is displayed.
2. In the Operator menu, select the operator describing the answer that the page’s display is based on.
3. In the Value menu, select the answer that the page’s display is based on. If you wish to base the display on the contents of the “Other” field, do not select anything in the Value menu, and enter the text in the Other: field.

4. If this is not the first condition on the page, the Group menu will be visible.
  - If the condition should be part of a group in which all the conditions must be met, select the group number from the Add to Group menu. All conditions in the group must be met for the page to be displayed.
  - If the condition should not be part of an existing group, leave **Create New Group** selected in the Add to Group menu. A new group will be created for the condition. If all of the conditions in any group are met, the page will be displayed.
5. Click **Add Condition**. The condition will be added.
6. Choose one of the following:
  - If you are finished entering page conditions, click **Save & Continue** at the top of the page.
  - If you wish to enter more conditions, follow steps 1-5.

### Applying an Existing Page Condition

If you've already configured a page condition or item condition in the form or survey, you can select that condition instead of creating a new one. To select an existing condition, follow these steps in the Add Existing Condition panel:

1. In the Condition menu, select the existing condition you wish to use.
2. If a condition is already applied to the page, the Add to Group menu will be displayed.
  - If the condition should be part of a group in which all the conditions must be met, select the group number from the Add to Group menu.
  - If the condition should not be part of an existing group, leave **Create New Group** selected in the Add to Group menu. A new group will be created for the condition.
3. Click **Add Condition**. The condition will be added.
4. Choose one of the following:
  - If you are finished entering page conditions, click **Save & Continue** at the top of the page.
  - If you wish to enter more conditions, follow the steps in [Creating a Page Condition](#) to add a new condition or steps 1-3 of this procedure to apply an existing condition.

### Removing a Page Condition

To remove a page condition, follow this step:

1. In the Page Conditions panel, locate the condition you want to delete.
2. Click **Delete**. A confirmation dialog box will be displayed.
3. Click **OK**. The condition will be deleted.

## Working with Item Conditions

After you've created a landing page with at least one item, you can use conditional logic to determine whether items on the page are displayed.

### Creating an Item Condition

To create a new item condition, follow these steps:

1. Add the item to the page.
2. At the right side of the item, click **Item Conditions**. The Item Conditions page will be displayed.
3. In the Question menu, select the question that the condition is based on.
4. In the Operator menu, select the operator describing the answer that the item's display is based on.
5. If this is not the first condition on the page, the Group menu will be visible.
  - If the condition should be part of a group in which all the conditions must be met, select the group number from the Add to Group menu. All conditions in the group must be met for the page to be displayed.
  - If the condition should not be part of an existing group, leave **Create New Group** selected in the Add to Group menu. A new group will be created for the condition. If all of the conditions in any group are met, the page will be displayed.
6. Click **Add Condition**. The condition will be added.
7. Choose one of the following:
  - If you are finished entering page conditions, click **Save & Continue** at the top of the page.
  - If you wish to enter more conditions, follow steps 1-6.

### Applying an Existing Condition

If you've already configured a page condition or item condition in the form or survey, you can select that condition instead of creating a new one. To select an existing condition, follow these steps in the Add Existing Condition panel:

1. In the Condition menu, select the existing condition you wish to use.
2. If a condition is already applied to the page, the Add to Group menu will be displayed.
  - If the condition should be part of a group in which all the conditions must be met, select the group number from the Add to Group menu.
  - If the condition should not be part of an existing group, leave **Create New Group** selected in the Add to Group menu. A new group will be created for the condition.
3. Click **Add Condition**. The condition will be added.
4. Choose one of the following:
  - If you are finished entering page conditions, click **Save & Continue** at the top of the page.
  - If you wish to enter more conditions, follow the steps in [Creating an Item Condition](#) to add a new condition or steps 1-3 of this procedure to apply an existing condition.

*Configuring an item to be displayed if the respondent selects “Field trip chaperone” as the answer to the question “What are your interests?”*

**Conditions For:**

**Please tell us about your chaperoning experience.**

There are no conditions. This item will always be displayed.

**Create New Condition**

**Question:**

**Operator:**

**Value:**  **Other:**

### Removing an Item Condition

To remove an item condition, follow this step:

1. In the Item Conditions panel, locate the condition you want to delete.
2. Click **Delete**. A confirmation dialog box will be displayed.
3. Click **OK**. The condition will be deleted.

# Testing Forms and Surveys

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Before you publish a form or survey, you should test it thoroughly to make sure that it appears and behaves the way that you intend. The following topics are covered in this section:

- [Viewing the Form or Survey as a Visitor to Your Site](#)
- [General Principles for Testing Forms and Surveys](#)
- [Issues to Look For](#)

## Viewing the Form or Survey as a Visitor to Your Site

To view the form or survey the same way as a visitor, follow these steps:

1. Save your changes to the form.
2. In the URL to Complete Form section on the top page of the form, select and copy the URL for the form or survey.
3. Launch a different Web browser than the one you used to create the form. For example, if you created the form using Chrome, launch Firefox, Internet Explorer, or Safari.

**NOTE:** To see how the form or survey appears to the public, you must use a Web browser in which you're not logged in to Doubleknot. It's not sufficient to open a new tab or window in the browser that you used to create the form.

4. Click your mouse in the Address bar of the new browser, and paste the URL for the event.
5. Press **Enter**. The first page of the form or survey will be displayed as it appears to visitors on your web site.

To allow other people to review the form or survey, email them the URL and instructions to use a browser in which they are not already logged in to the Doubleknot system.

## General Principles for Testing Forms and Surveys

Testing form or survey configuration requires going through it several times for the purpose of finding errors. You complete the form or survey as many times as needed to answer the following questions:

- If I enter or select correct information that meets the form's requirements, does the form work as expected?
- If I enter or select information that doesn't meet the form's requirements, do I see the right error messages and have the opportunity to correct my errors?

If your form or survey is complex with multiple options, you should test it several times and choose different options each time. For example, if you are using conditional logic, you should go through the process at least once for every possible option.

## Issues to Look For

### All Pages and Items

- Does each item display correctly?
- Are the questions easy for the respondent to understand?
- Are there grammar, spelling, or punctuation errors in the question or answers?
- Does the order in which the questions are presented make sense?
- Is each item correctly set as required or not required?

### Dropdown Menus and Radio Buttons

- Does the default answer (if any) display correctly?
- Is the item correctly set as required or not required?
- If "Other" is an option, does it display correctly?

### **Checkboxes**

- Are the default answers correctly selected (if configured)?
- If “Other” is an option, does it display correctly?
- If a minimum or maximum number of responses is set, are respondents warned if they don’t meet the requirement?

### **Universal Lists**

- Is the correct list displayed?

### **Single-Line Text Areas**

- Is the correct format required for the answer?
- Are the correct minimum and maximum values set?
- Is the correct default value displayed?

### **Multiple-Line Text Areas**

- Is the correct default value displayed?

### **Rich Text**

- Is the correct default value displayed?

### **Date**

- Is the correct default date displayed?
- Are the earliest and last dates allowed correct?

### **Captcha**

- Does the Captcha display the correct number of characters?
- Does the Captcha display the correct kind of characters?
- Is the Captcha required?

### **Page Branching**

- Are the correct pages displayed based on the respondent’s entry or selection on the original page?

### **Conditional Logic**

**NOTE:** To test conditional logic, it is important to test every possible path that a respondent might take and confirm that the correct pages and/or items are displayed.

- Are the correct pages and items displayed based on the respondent’s previous entries or selections?

## Deleting Test Results Before Publishing

If you've fully tested your form or survey, you've created several responses that contain testing data. To delete your testing data from the results before publishing the form or survey, follow these steps at the Current Form page:

1. In the Results section, click **Delete Results**. A confirmation dialog box will be displayed.
2. Click **OK**. The results will be deleted.

## Making the Form Active

When you are confident that the form is fully tested and working correctly and you have deleted all test results, make the form active. When the form or survey is active, it can be viewed by anyone who has access to it, including visitors to your web site. If you chose to publish the form to the banner, it will be displayed in the banner according to the date range you selected in [Choosing the Start and End Dates](#).

To set the form as active, follow these steps.

1. Display the Current Form page.
2. In the Status section, select **Active**.
3. Click **Done**.

# Publishing Forms and Surveys

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The following topics are covered in this section:

- [Warning: Do Not Copy URLs from the Browser's Address Bar](#)
- [Placing a Link in a SiteBrander Page or a Communications Center Email](#)
- [Sharing a Link With Others](#)
- [Publishing to the Web Site Banner](#)

## **Warning: Do Not Copy URLs from the Browser's Address Bar**

When you're sharing a link to a survey, do not copy and paste the URL displayed in your browser's address bar. Always use the DK Links feature to place the link in a Doubleknot page or document, or copy the full URL from the Current Form page.

## **Placing a Link in a SiteBrander Page or a Communications Center Email**

DK Links is a feature that's available everywhere you can use the Doubleknot rich text editor, including SiteBrander, Communications Center, Newsroom, Event Management, and more.

To include a link to the form or survey using DK Links, follow these steps:

1. Create or edit the item (such as a SiteBrander page, Newsroom article, or Communications Center email) where you want to place the link.
2. Place the cursor where you want to place the link.
3. Click the **DK Links** button. The Doubleknot Links window will be displayed.
4. If the link you want to use is in another organization, select the organization in the Display Links For: menu at the top right corner of the window.
5. At the left side of the window, click **Survey**. All the forms and surveys for the organization will be displayed.
6. Locate the form or survey, and click the green plus icon to the left of its name. Information about the link will be displayed at the bottom of the window.
7. To change the text displayed in your document for the link, enter new text in the Link Name field.
8. To change the text displayed when a visitor hovers the mouse over the link, enter new text in the Tooltip field.
9. Click **OK**. The link will be added to your document.

## **Sharing a Link With Others**

To share a link in a regular email or other document, follow these steps:

1. Click the name of the form in the Manage Forms list.
2. On the Current Form page, locate **URL to Complete Form Item**.
3. Copy the complete URL to the clipboard and paste it in your email or other document.

## **Publishing to the Web Site Banner**

As noted in the [Publishing the Form or Survey to the Banner on Doubleknot Pages](#), you can publish the survey to the banner on your web site for a specified date range. Complete information is located in that section.



# Viewing Survey Results

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This section covers the following topics.

- [Getting Started With Survey Results](#)
- [Viewing a Summary of Results](#)
- [Searching For Specific Responses to Questions](#)
- [Exporting Survey Results](#)

## Viewing Survey Reports

The easiest way to view and manipulate search results is with the Report Writer. To view a report of survey results, follow these steps:

1. On the Manage Forms page, locate the form whose results you want to view.
2. In the Actions column, click **Reports**. The Report Selection page is displayed.
3. Click **View Results**. The results will be displayed in Report Writer.
4. The following are a few options available in Report Writer:
  - To remove a field from the report, select it from Delete Field menu
  - To filter the results, select the column(s) whose results you want to limit from the menus in the Filter Field column and use the Operator and Value(s) menus to enter your criteria.
  - To download the results, click the icon for the desired format (PDF, HTML, CSV, Excel, XML, or RTF).
5. When you're finished, click **Done**. The Report Selection page is displayed.
6. Click **Done** to return to the Manage Forms page.

## Working With Detailed Survey Results

To get started viewing detailed survey results, follow these steps:

1. On the Manage Forms page, locate the form whose results you want to view.
2. In the Results column, click **View**. The Summary Results page will be displayed.

### *Summary Results page*

Summary Results	
<b>Current Form:</b> <a href="#">2014 Member Satisfaction Survey</a>	
<b>Form Info</b>	<b>Title:</b> 2014 Member Satisfaction Survey <b>Description:</b> Thank you for helping us serve you better!
<b>Report Info</b>	<b>Total Responses:</b> 12 <b>Report Time:</b> 2/14/2014 1:57:04 PM
<b>Please Note:</b> Viewing results for all pages at once on large forms can take up to a few minutes	
<b>Choose Page:</b>	Choose: <input type="button" value="Select Page"/>

## Viewing a Summary of Results

To view a summary of results, follow these steps on the Summary Results page:

1. From the Choose Page menu, select the page whose results you want to see. If you want to see all results, select **All Pages**.
2. Click **Select Page**. A summary of all results for the selected page (or for all pages) will be displayed.
3. To display the results on a page that is formatted for printing, click **Printable Version**. A new tab or window will be displayed with the results in more printable format.

### Summary of results for a question on a page

**Question:** What kind of volunteer activities are you interested in?  
5 Total Response(s)

**Response:** Library Volunteer  
**2 Response(s)** ██████████ 40.00 %

**Response:** Field Trip Driver  
**1 Response(s)** ██████████ 20.00 %

**Response:** Snack Coordinator  
**1 Response(s)** ██████████ 20.00 %

**Response:** Office Assistance  
**1 Response(s)** ██████████ 20.00 %

### Searching For Specific Responses to Questions

Doubleknot provides a powerful search mechanism that lets you display answers that meet your criteria for a specific question.

#### Getting Started

To begin to search for specific responses to questions, follow these steps:

1. On the Manage Forms page, click the name of the form (or click **Edit**).
2. In the Results section, click **View Reports**. The Summary Results page will be displayed.
3. At the top of the page in the Current Form area, click the name of the form or survey. The Search Form results page will be displayed.

### Search Form Results page

The screenshot shows the 'Search Form Results' interface. At the top, there is a dropdown menu for 'Form: 2014 Member Satisfaction Survey' with buttons for 'Change Form' and 'Summary Results'. Below this are search filters: 'Search By Results: From: 0 To: 0' with a 'Search' button, and 'Search By Question: Select a Question' with 'Select an Operator' and a 'Search' button. The main area contains a table with the following columns: Response ID, User name, Amount, Completed, User IP, and Delete?. The table lists 13 responses, with the first one being '3884065' by 'SIZoo Admin' completed on 12/19/2013. At the bottom of the table are buttons for 'Delete Selected Responses' and 'Done'.

Response ID	User name	Amount	Completed	User IP	Delete?
3884065	SIZoo Admin	0	12/19/2013 1:44:07 PM	74.95.2.157	<input type="checkbox"/>
3884088		0	1/3/2014 12:46:59 PM	74.95.2.157	<input type="checkbox"/>
3884089		0	1/3/2014 12:49:15 PM	74.95.2.157	<input type="checkbox"/>
3884090		0	1/3/2014 12:49:49 PM	74.95.2.157	<input type="checkbox"/>
3884091		0	1/3/2014 12:54:24 PM	74.95.2.157	<input type="checkbox"/>
3884094		0	1/3/2014 1:06:46 PM	74.95.2.157	<input type="checkbox"/>
3884096		0	1/3/2014 1:14:17 PM	74.95.2.157	<input type="checkbox"/>
3884100		0	1/3/2014 1:50:47 PM	74.95.2.157	<input type="checkbox"/>
3884101		0	1/3/2014 1:52:13 PM	74.95.2.157	<input type="checkbox"/>
3884109		0	1/6/2014 1:34:16 PM	74.95.2.157	<input type="checkbox"/>
3884472		0	3/3/2014 10:46:45 AM	74.95.2.157	<input type="checkbox"/>
3884473		0	3/3/2014 10:48:06 AM	74.95.2.157	<input type="checkbox"/>

## Searching For Results

To search for results, follow these steps in the Search By Question panel:

1. To select a question whose results you wish to view, select the question from the Select a Question menu.
2. In the Select an Operator menu, select the criteria that the answer must meet from the following options:
  - **Equals**—Displays responses that exactly match your criteria.
  - **Does Not Equal**—Displays responses that do not match your criteria.
  - **Is Greater Than**— For numerical or date items, displays responses that are less than your criteria.
  - **Is Less Than**—For numerical or date items, displays responses that are less than your criteria.
  - **Contains**—Displays responses that contain your criteria.
  - **Does Not Contains**—Displays responses that do not contain your criteria.
  - **Answered Question**—Displays responses for all respondents who answered the question.
  - **Did Not Answer Question**—Displays responses in which the respondent did not answer the question.
3. In the Select a Value menu, select the answer or a descriptor of the answer you are interested in. The options that are displayed depend on the kind of question you selected. For example, if the question contains radio buttons, only the names of the possible answers will be displayed. If the question contains checkboxes, you can choose specific answers or whether the respondent selected a specific number of checkboxes.
4. If you selected a question where the respondent could enter text (such as a single-line text field, a multiple-line text area, or any item with an “Other” option), enter the text in the field at the end of the row.
5. Click **Search**. All the responses with results that match your criteria will be displayed.

## Viewing an Individual Response

To view the complete contents of any response displayed on the Search Form Results page, follow this step:

1. Click the Response ID. The Response Details page for that respondent will be displayed.

## Response Details page

The screenshot shows a web form titled "Response Details" for a survey named "Community Passport Application". The form contains a description, a list of fields with their corresponding answers, and a table of questions and answers. At the bottom, there are two buttons: "Delete Response" and "Go Back".

**Current Survey:** Community Passport Application

**Description:**  
Thank you for considering the [Financially Stable](#) Community Access Program as a tool to support the members of your community. Please complete the following application. Items with an asterisk (\*) are required fields.

**Name:**                      **Email:**  
**Organization:**

**Time Started:** 2/1/2011 1:07:59 PM  
**Time Completed:** 2/1/2011 1:12:45 PM  
**Total Time:** 5 Minute(s)

Question	Answer
Organization Name:	State of Healthy Northside Center
Contact Name:	Walter B. Robinson
Contact Title:	General Support Director
Address #1:	401 N. 3rd Street
City:	Memphis
State:	IL
Zip:	38102
Phone Number:	(901) 254-4300
E-Mail Address:	walter@northside.com
Organization Website:	www.northside.org
Type of Organization:	501(c)(3) Non-Profit Organization
Reason For Application:	Other
Organization Mission Statement:	Our mission is to provide and promote quality health care services to the underserved and to build their health.
Federal Tax ID#:	27-2000000
Number of people served by organization:	100000

[Delete Response](#)   [Go Back](#)

### Deleting Individual Results

To delete results at the Search Form Results page, follow these steps:

1. For each response you wish to delete, click the checkbox in the Delete column at the end of the row.
2. At the bottom of the page, click **Delete Selected Responses**. The selected responses will be deleted.

To delete the result you're viewing, follow this step at the Response Details page:

1. At the bottom of the page, click **Delete Response**. The response will be deleted.

### Exporting Survey Results

To export survey results to a CSV (comma-separated values) file on your computer that can be opened by Microsoft Excel or similar programs, follow these steps:

1. At the main Forms and Surveys page, click **Export**. The Export Results to CSV page will be displayed.
2. In the Choose Survey menu, select the form or survey whose results you want to export.
3. If you want to include detailed responses, select **Detailed Response Info**.
4. If you want to include detailed information about the respondent, select **Detailed User Info**.
5. Click **Export**. The file will be created and downloaded. Follow the steps for your browser and operating system to open the file.