

Managing Questionnaires - Quick Start

Welcome to the QualysGuard® Questionnaire application. You're responsible for managing questionnaires.

Let's get started

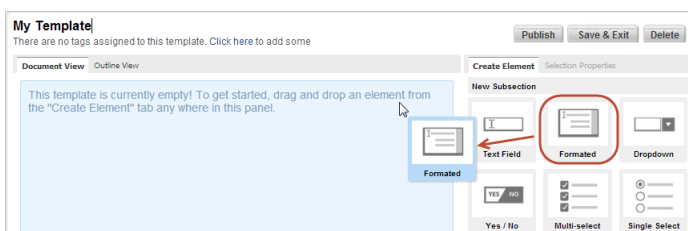
When you log in you'll see the Welcome page. If not, click your name (in the upper right) and choose Quick Start Guide from the menu.

You'll notice there are just 3 steps:

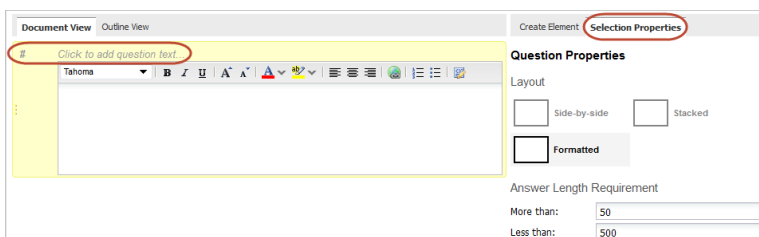
- 1 **Build a new Template** > Create a template with the questions you need to have answered.
- 2 **Launch a Questionnaire** > Launch a questionnaire based on your template and assign it to users.
- 3 **Create Reports** > Create reports on questionnaire responses.

Step 1: Design Your Template

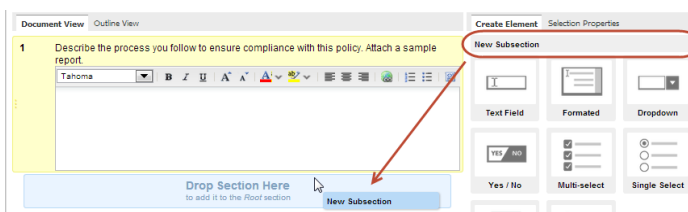
To begin, type a title and description in the template heading. Then add questions by dragging elements from the Create Element tab onto the template body. We have elements for all types of questions.



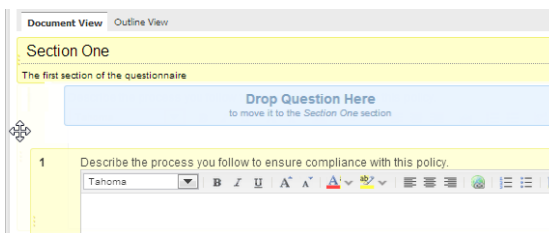
Add question numbers and text. You'll notice the Selection Properties tab appears to help you apply rules and requirements to your question. These options vary depending on the question type you choose.



Add subsections - It's easy to divide a complex template into subsections. Just click the Elements tab and drag the New Subsection element onto the template. Then add a title and description.



Move elements - Drag and drop to rearrange questions and subsections as needed. Hover over the left side of the element. When your cursor becomes this icon, click and drag the element to a new location.



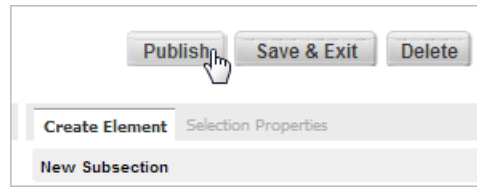
Can I stop and finish later?

Yes, you can save your template at any time and return later. Just click Save & Exit at the top of the page.



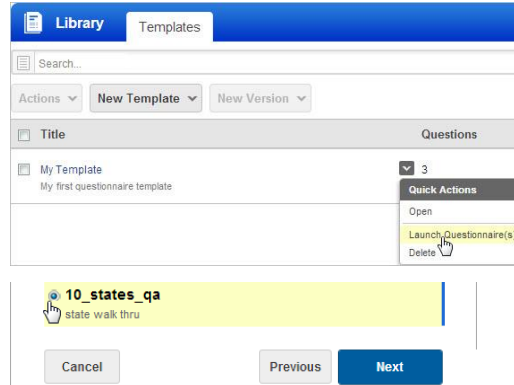
Publish your template

Click Publish in template header. When prompted to confirm, click Accept. You'll see your new template in your templates list, ready for launching questionnaires.



Step 2: Launch a Questionnaire

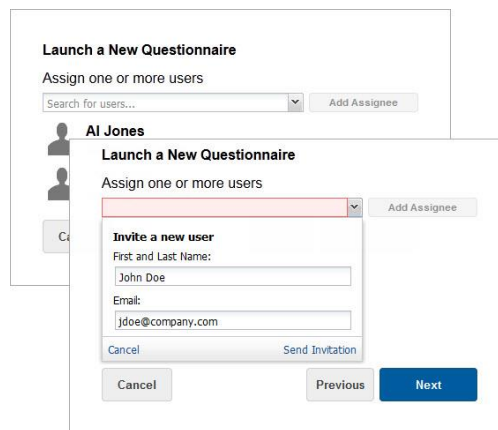
You can launch a questionnaire based on your new template right from your templates list. Just hover over the template and choose Launch Questionnaires from the menu.



Choose a workflow that's appropriate for the questionnaire (we provide several). Click Next.

How do I assign users?

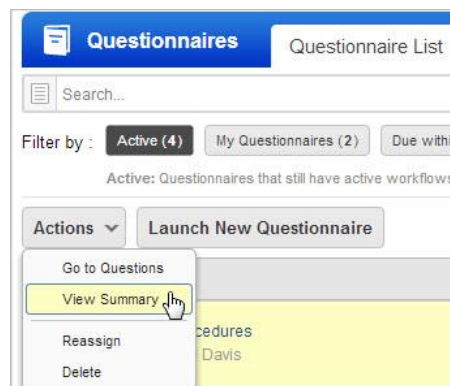
A questionnaire can be assigned to any number of users. Each user receives their own instance of the questionnaire. Choose users from the drop-down menu. To invite new users, expand the drop-down and click the "Invite a new user" link. Enter the user's name and email address, click "Send Invitation" and then click Add Assignee.



Click Next and enter a title and the due date for the questionnaire. Then click Finish. Each assigned user will receive an email with instructions for logging in to access their instance of the questionnaire.

How do I track my questionnaire's progress?

Yes, just click the questionnaire in the questionnaire list and choose View Summary from the menu. The summary shows you the overall status of your questionnaire including percent complete and all user activity since launch.



Step 3: Create Reports

We provide 2 reports. Create a single instance report to check the responses to a single instance of a questionnaire. Create an aggregate template report to report on multiple questionnaires launched from one template. Go to Reports > Report List, click the New Report button and tell us which report you want and the target questionnaire(s).