

# BizViz How-to-Guide

## How to Publish a Survey

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Business Visualization  
Analytics Platform





**Table of Contents**

- 1. Document Purpose.....2
- 2. Prerequisites.....2
- 3. Step-by-Step Process.....2
  - 3.1 Publishing a Survey.....4





## 1. Document Purpose

The purpose of this document is to guide users on how to create a survey. It is recommended to follow the step-by-step process given below to successfully create a survey.

## 2. Prerequisites

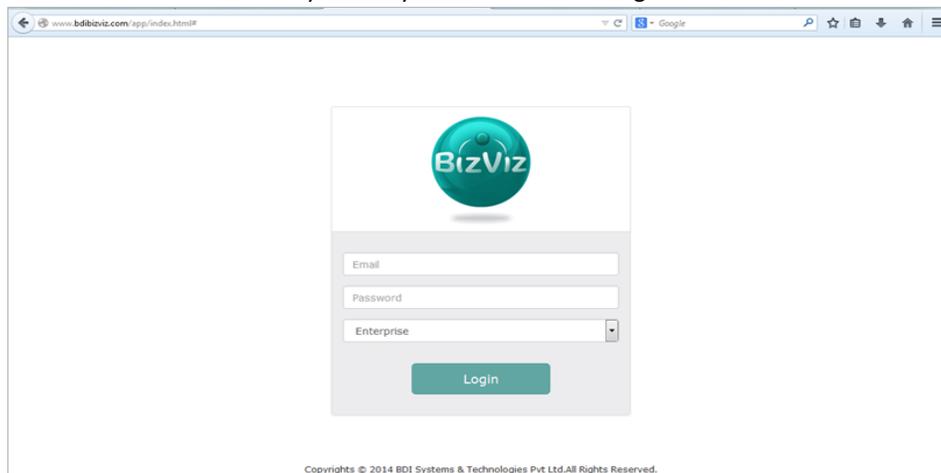
- Software
  - Browser that supports HTML5
  - Operating System: Windows7
- Basic understanding of the BizViz Server

## 3. Step-by-Step Process

### Login to the Portal to access Data Management

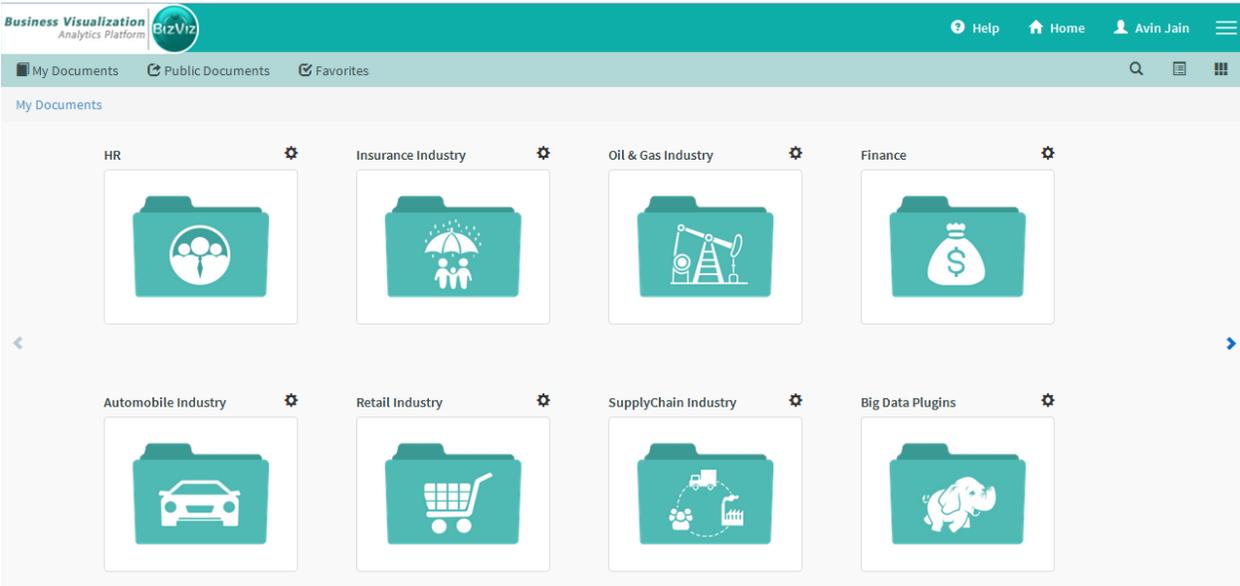
i) Enter in the URL bar → <http://www.bdbizviz.com/app/>

ii) Enter your credentials to Login

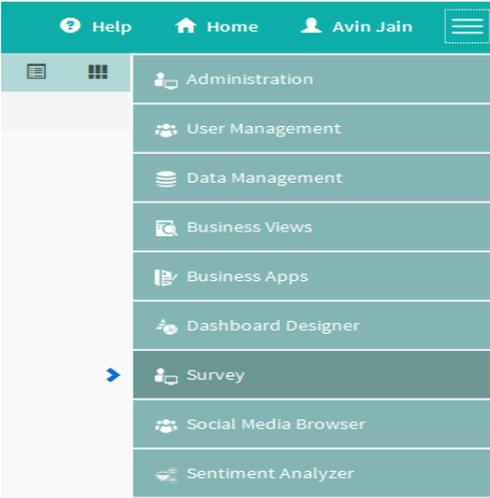




iii) Click on **'Login'** to view the Portal Home Screen



Click on the **'Menu'** button to display a list of the installed applications



iv) Click on **'Survey'** plug-in available in the above figure (see above)

v) Clicking on **'Survey'** it will redirect user to the below given page



## BizViz Survey

Show 10 entries      Search:

Survey Name ▲	Created ▼	Updated ▼	Responses ▼
BizViz Survey Help	26/04/2015	15/05/2015	0
FedEx Sample Survey	08/04/2015	15/05/2015	12
HR Survey	09/04/2015	29/05/2015	129
Mobile Trends Survey	26/04/2015	21/05/2015	387
Test	29/05/2015	29/05/2015	0

Showing 1 to 5 of 5 entries      Previous 1 Next

15 Question Types

Benchmarking, Text Analysis, Sentiment Analytics

Page, Question, Skip Logic

Mobility, Custom Logo & Branding

Custom Integration with 3rd Party

End to end Survey creation & Analytics Service

Available with BizViz Platform or as a Stand Alone Services

### 3.1 Creating a Survey

- I. Click on the 'Menu' button and select 'Create Survey' option

The screenshot shows the 'Menu' dropdown open over the survey list. The dropdown options are: Create Survey, Survey List, Benchmark List, Benchmark Analysis, and Contacts. The 'Create Survey' option is highlighted. The background shows the same survey list as in the previous image.





**BizViz Survey**

Create New Survey

Survey Title : SampleSurvey

Survey Description : Enter Survey Description

Welcome Message :

Rich text editor toolbar with options for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, and Font Size.

Create New Survey

Enter the following details:

- 1. **Survey Title:** Give a title to the survey
- 2. **Survey Description:** Any description if required can be given
- 3. **Welcome Message:** Message that displays when the survey starts.

Click on the 'Submit' button to start creating the survey.

**BizViz Survey**

SampleSurvey

Questions | Page | Survey | Properties

Save | + Add Page | All Pages

<input type="radio"/> Single Answer	<input checked="" type="checkbox"/> Multiple Answer
<input type="checkbox"/> Matrix-Single Answer	<input checked="" type="checkbox"/> Matrix-Multiple Answer
<input type="checkbox"/> Rating Scale	<input type="checkbox"/> Multiple Textbox
<input type="text"/> Textbox	<input type="comment"/> Comment
<input type="number"/> Numerical Textbox	<input type="descriptive"/> Descriptive
<input type="image"/> Image	

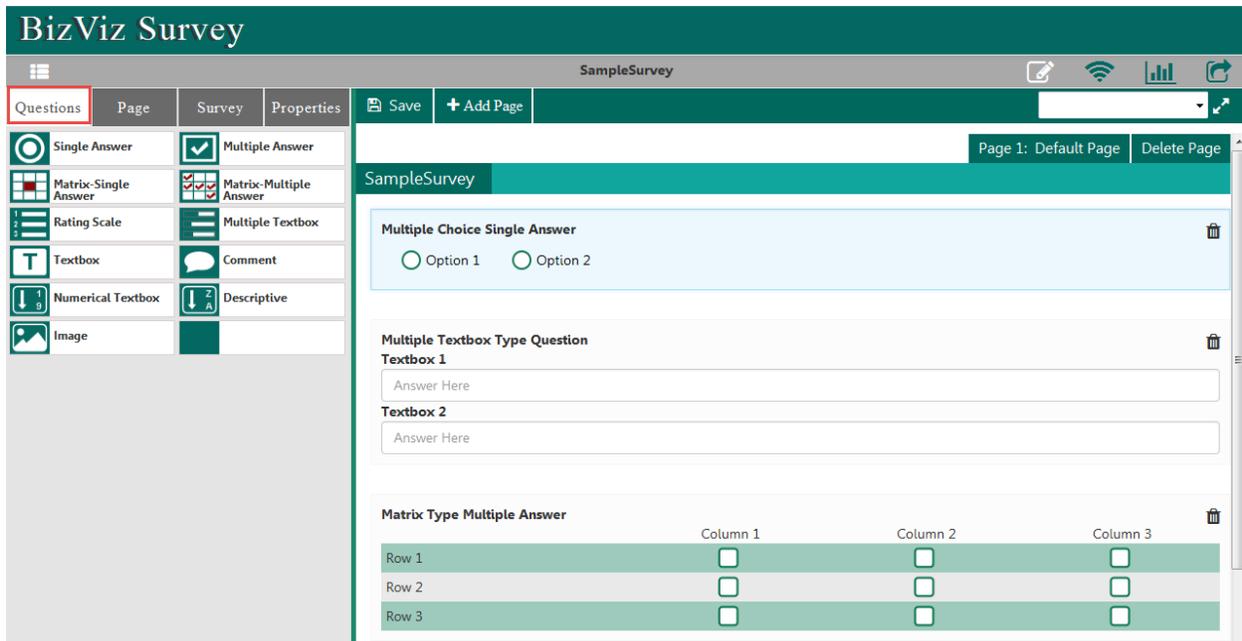
Page 1: Default Page | Delete Page

SampleSurvey

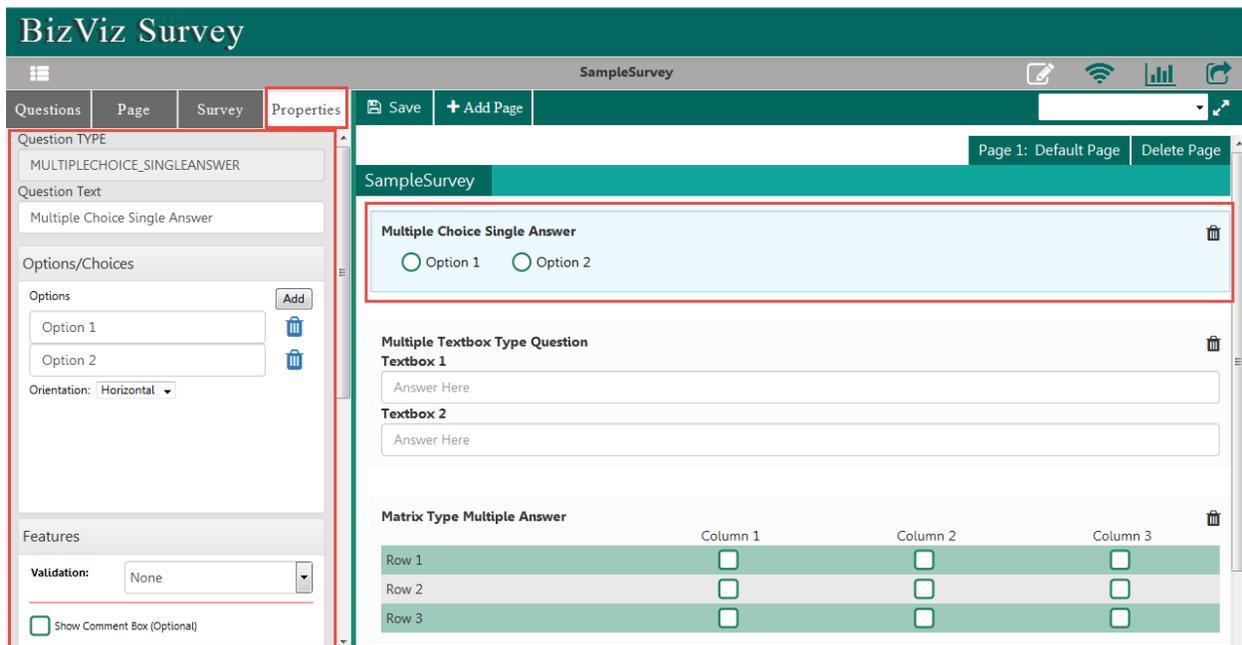
Question is not added in this page

Drag and Drop questions provided under 'Questions' tab





Click on a question to view the properties of it.



Enter the following Properties of the selected question:

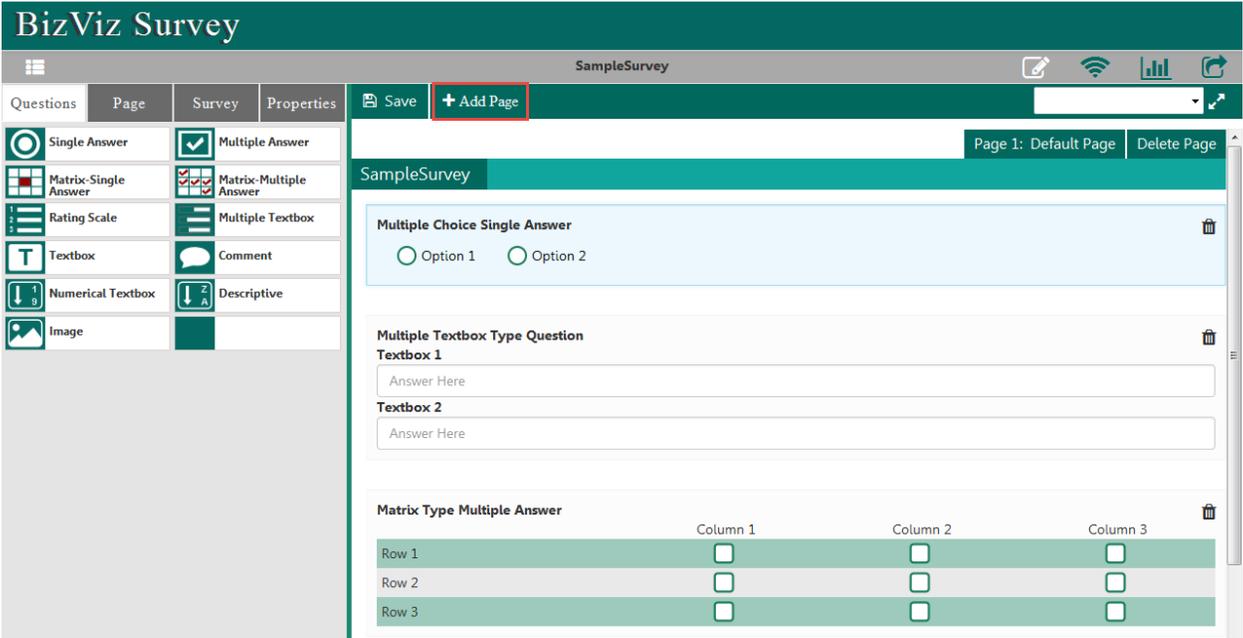
1. **Question Type:** By default the question type will appear
2. **Question Text:** Enter the question here
3. **Options/Choices:** Provide options to the entered question
4. **Features:**
  - a. **Validation:** If validation is selected to 'Required' then it's a mandatory question

- b. **Show Comment Box:** Comment box will be provided under that question
- c. **Use Logic:**

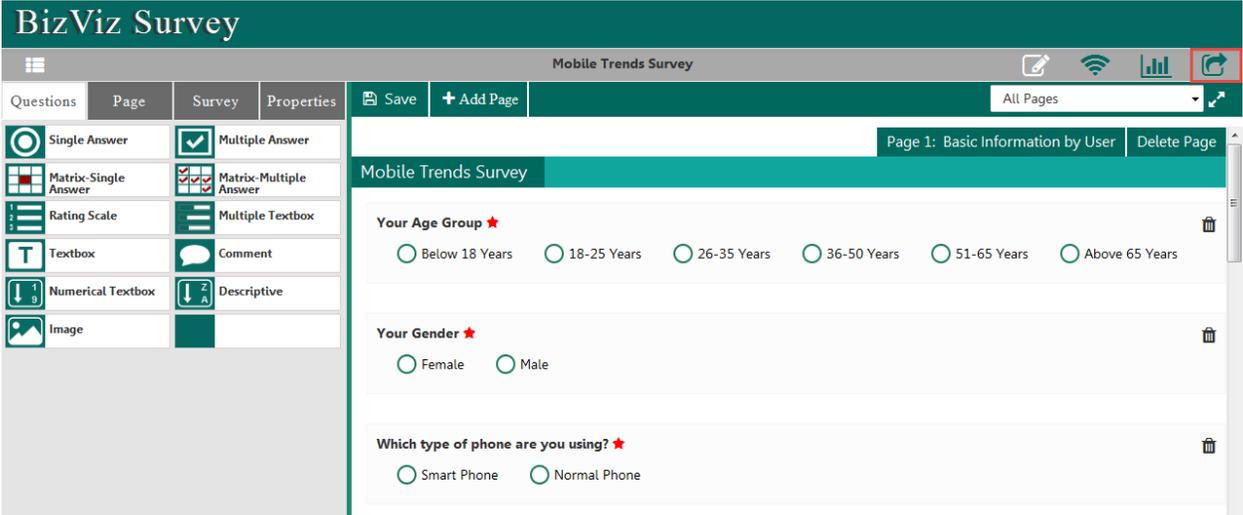
**5. Actions**

- a. **Select Action:** If 'Move' option is selected then the question can be moved between pages.
- b. **Page:** Displays list of pages available.

**II. Click on '+Add Page'** to add a new page to the survey

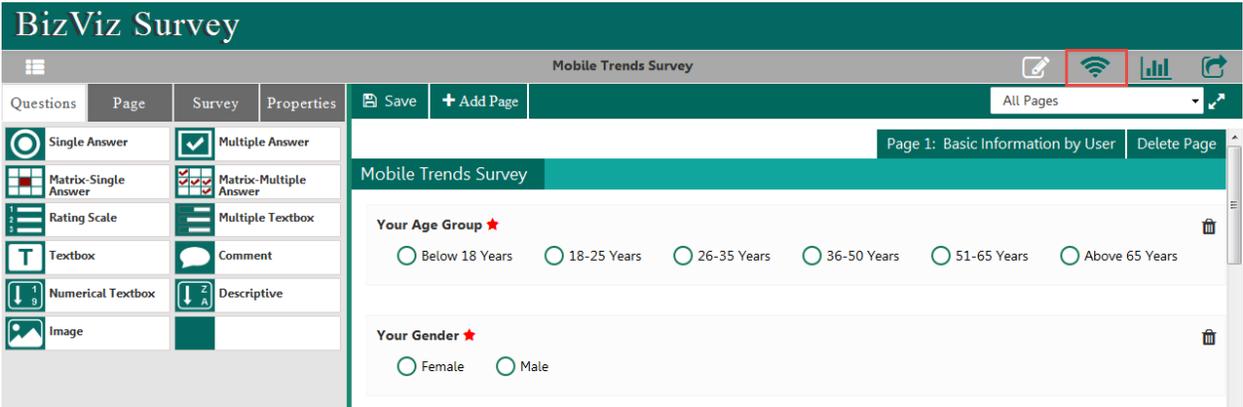


**III. Click on 'Preview'** button to view the survey





IV. Click on 'Publish' button to publish the created survey



V. Clicking on 'Publish' it will redirect user to the below given page

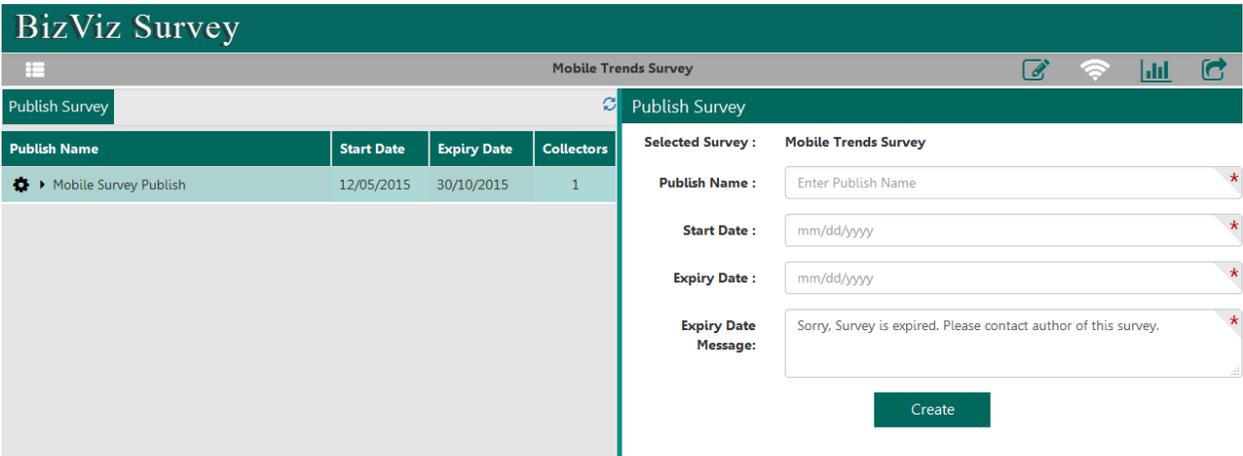
Enter the following details:

1. **Selected Survey:** By default the name will appear
2. **Publish Name:**
3. **Start Date:** Date on which the users can access the survey
4. **Expiry Date:** Date on which the survey ends
5. **Expiry Date Message:**

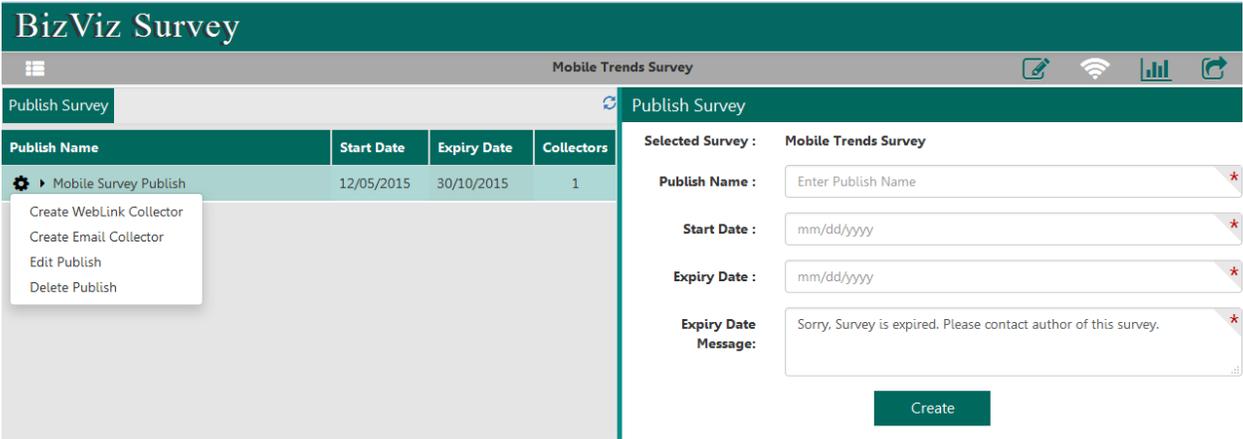
VI. Click on 'Create' button to publish the survey.

VII. Created surveys will be displayed as seen below





VIII. Click on 'Settings' icon to create a access link to the survey



The following options are used for:

- 1. Create Web-Link Collector:** A web-link will be generated which can be used to access the survey
- 2. Create Email Collector:** A link will be sent to desired email address to access the survey
- 3. Edit Publish:** Used to edit the Publish details
- 4. Delete Publish:** Used to delete the Published survey

