

# BizViz Survey Platform User Guide

## BizViz Survey 1.0

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## 1. About this Guide

### 1.1. Document History

Product Version	Date (Release date)	Description
BizViz Survey App 1.0	September 30 <sup>th</sup> , 2015	First Release of the document

### 1.2. Overview

This guide covers how to:

- Access the BizViz Survey Platform
- Design a Survey
- Publish a Survey
- Apply Analytics to the Survey

### 1.3. Target Audience

This guide is aimed at business professionals, data scientists, and management executives who use the BizViz Survey Platform to interact with business intelligence data and collect responses to be analyzed.

## 2. Introducing and Downloading BizViz Survey Platform

### 2.1. Introduction to the BizViz Survey

BizViz Survey is a powerful platform that provides organizations with the ability to create unique, interactive, and operational surveys to gather valuable information from customer feedback to product research. It serves as an effective tool to collect, store, and analyze relevant information regarding any business aspect. Integration of BizViz Survey with BizViz Analytics makes it a robust analytic tool extracting hidden insights out of the collected data. Survey results can also be converted into the interactive reports and dashboards revealing enhanced vision towards the business goals.

### 2.2. Prerequisites and Supported Devices

Component	BizViz Requirement
Computer and processor	Standard 64/32 -bit machine having good CPU.
Memory (RAM)	2 gigabyte (GB) RAM
Operating System	Windows / Linux
Recommended Bandwidth	2 Mb/s

Browser IE10+ / Chrome / Firefox

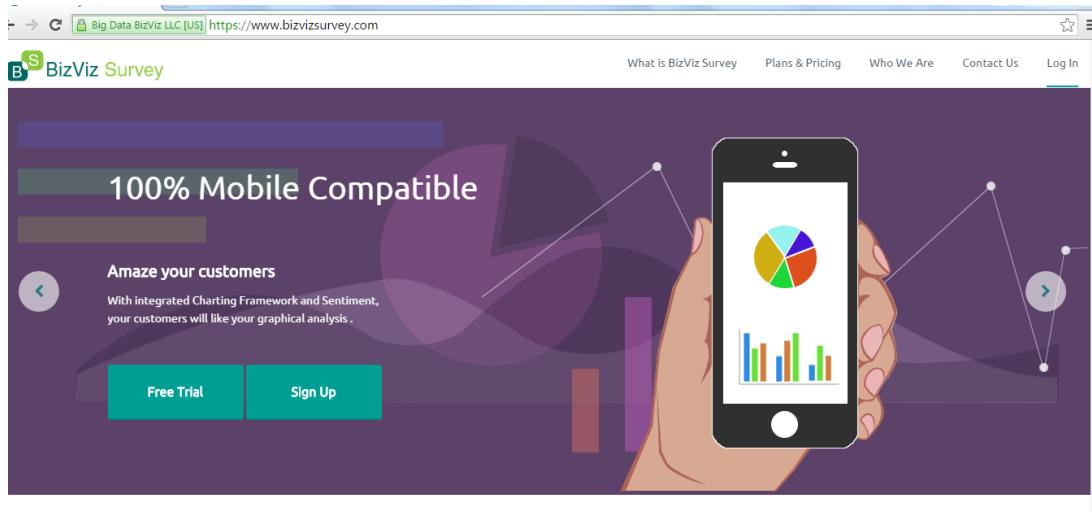
- BizViz Survey platform can be supported through Web browser, Tablet, and Mobile Phone.

### 3. Getting Started with the BizViz Survey Platform

Follow below mentioned steps to access the BizViz Survey Platform:

#### 3.1. Signing Up

- Open BizViz Survey Platform Link: <https://www.bizvizsurvey.com/>
- The below mentioned screen will appear



- Click on 'Sign Up' option
- It will redirect the user to a new screen
- Choose a survey plan and click on 'Sign Up' option for the same

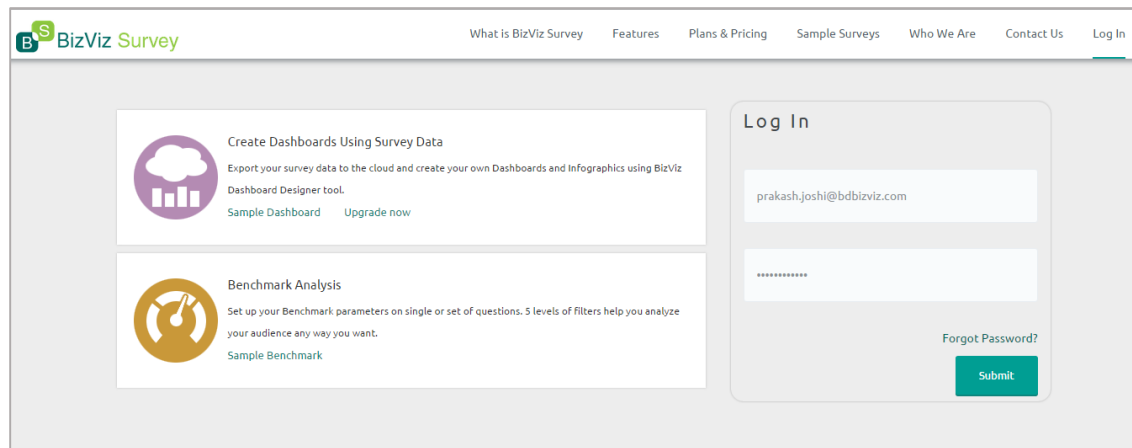
Features	Free Trial 30 Days	Basic 20 USD/Month	Premium 250 USD/Year	Platinum 1000 USD/Year
	<a href="#">Sign Up</a>	<a href="#">Sign Up</a>	<a href="#">Sign Up</a>	<a href="#">Sign Up</a>
<b>Survey Capabilities</b>				
# of Questions	10	Unlimited	Unlimited	Unlimited
# of Responses	50	1200	Unlimited	Unlimited
Get Responses via Web or Email	✓	✓	✓	✓
# of Collectors	1	3	5	Unlimited
Track Email Responses	✓	✓	✓	✓
<b>Survey Builder</b>				
11 Question Types	✓	✓	✓	✓
Pagination	✓	✓	✓	✓
Labelling, Titles, & Numbering	✓	✓	✓	✓
Question & Page Skip Logic	✓	✓	✓	✓
Customization & Branding				

- vi) It will redirect the user to a new screen
- vii) Fill in the required fields:
  - a. First Name
  - b. Last Name
  - c. Email
  - d. Password
  - e. Confirm Password
- viii) Click on '**Register**' option
- ix) User will be registered successfully

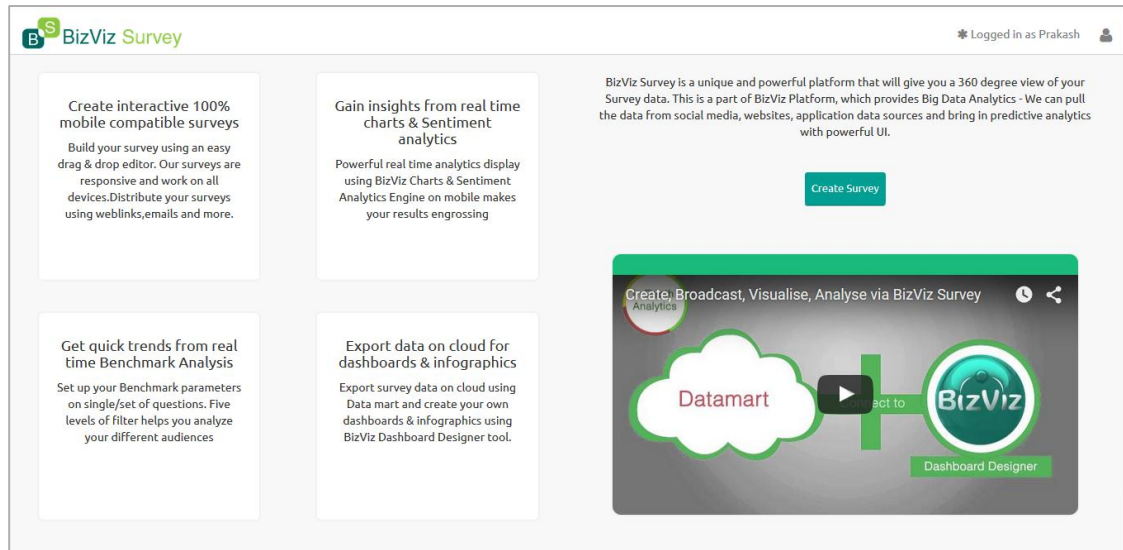
**Note:** After registering credentials for all the paid accounts, users will be directed to complete billing process. They can login only after the billing procedure gets completed.

### 3.2. Logging In

- i) Click on '**Log In**' option from the Header panel to get the Login page
- ii) Enter your registered credentials
- iii) Click on '**Submit**' option



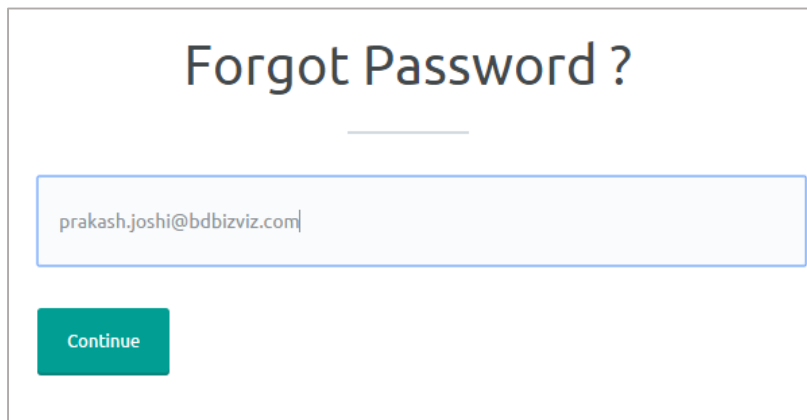
- iv) It will redirect the user to BizViz Survey Platform home screen



### 3.3. Forgot Password Option

BizViz Survey platform login screen provides ‘**Forgot Password?**’ option to provide the user with a facility to set a new password

- i) Go to Login screen
- ii) Click on ‘**Forgot Password?**’ option
- iii) It will redirect the user to a new screen
- iv) Enter contact email id
- v) Click on ‘**Continue**’



- vi) A new screen will open
- vii) Fill in the required details:
  - a. **Enter OTP:** Use the OTP received on the registered email id
  - b. **Enter Password:** Enter new password
  - c. **Enter Confirm password:** Confirm the set password
- viii) Click on ‘**Update**’ option

**OTP is successfully sent on registered email**  
nidhi.joshi@bdbizviz.com

Update Resend OTP

ix) User Password will be successfully updated

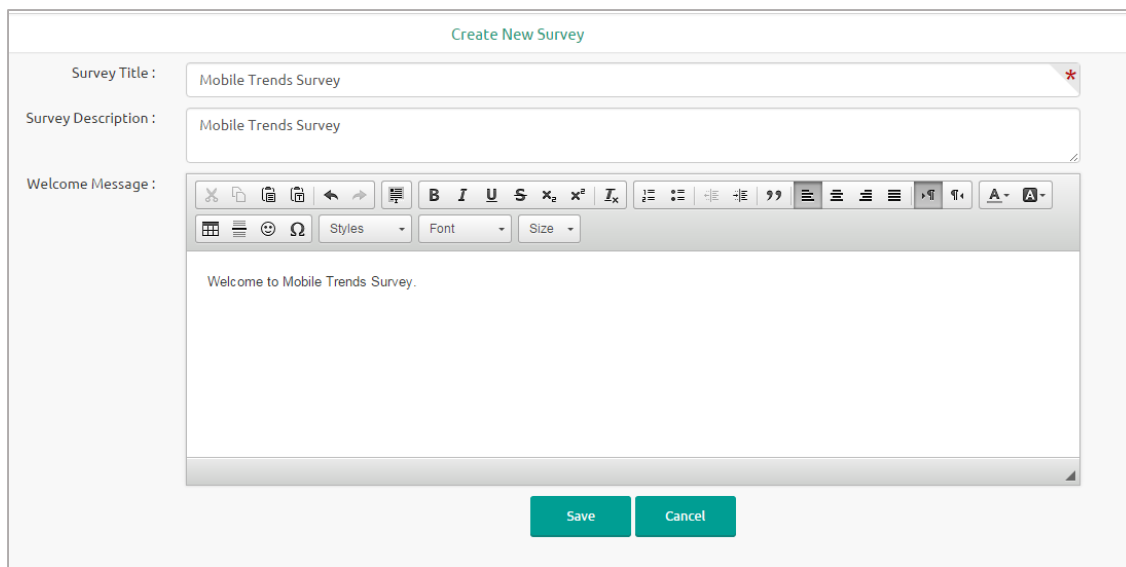
**Note:** Choose '**Resend OTP**' option, in case of any discrepancy in receiving OTP for the first time.

#### 4. Creating a Survey

Creating or designing part of a Survey is a simple and intuitive process with BizViz Survey Platform. It enables any user to create effective and flawless surveys in no time.

- i) Go to the Survey Platform home screen
- ii) Click on '**Create Survey**' option from the home screen
- iii) '**Create New Survey**' screen will open
- iv) Fill in the necessary details:
  - a. Survey Title
  - b. Survey Description
  - c. Welcome Message
- v) Click on '**Save**' option









vi) A new survey will be created and added on the left side of the platform home screen




vii) Description of the various icons provided besides a Survey

Sl. No.	Icons	Description
1.		Design Survey
2.		Publish Survey
3.		Analyze Result
4.		Other Options

## 5. Designing a Survey

This segment develops and maintains questionnaire for a survey. It describes all the supported features which can be used for designing a survey.

- i) Click on ‘**Design Survey**’  icon provided besides the survey name
- ii) Survey builder page will open with various options to develop a survey questionnaire



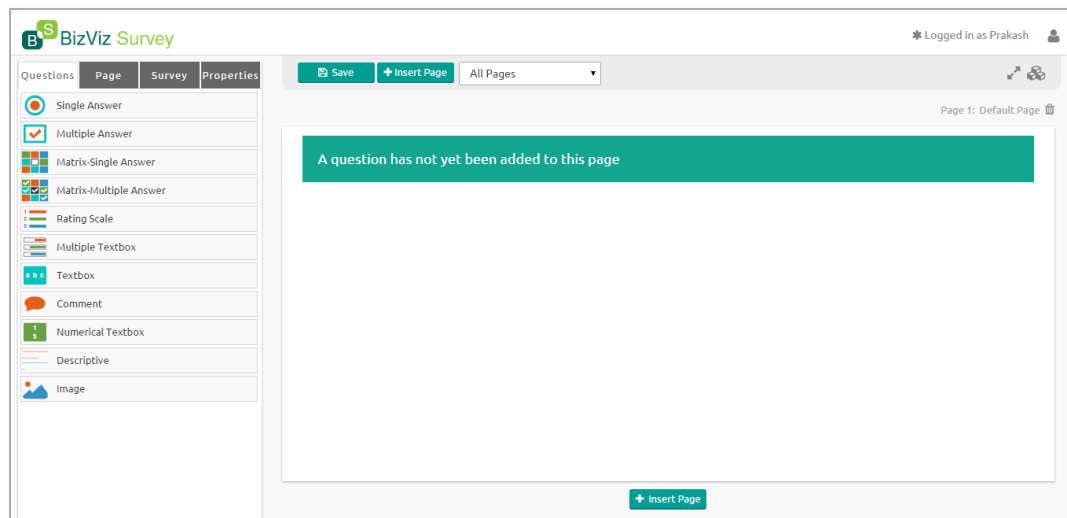
- a. Questions
- b. Page
- c. Survey
- d. Properties
- e. Save
- f. Insert Page

### 5.1. Questions

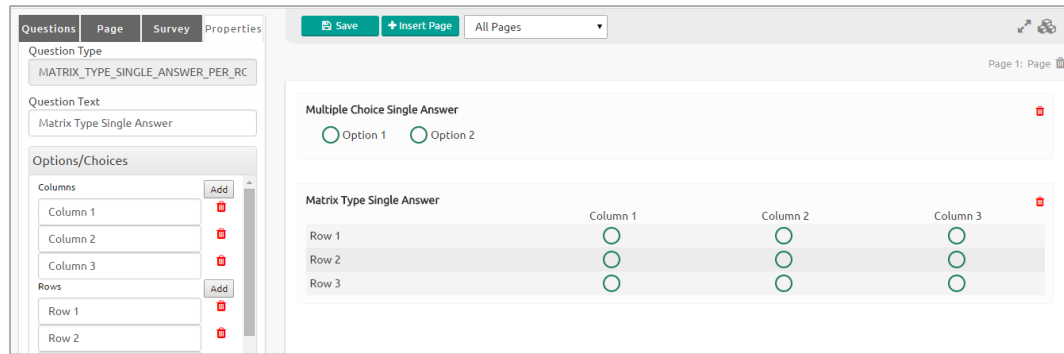
Survey is a carefully created questionnaire. Success of a survey depends upon easy to interpret and goal oriented questions.

#### 5.1.1. Inserting a Survey Question

- i) Go to Survey Builder Screen
- ii) Various question types will be displayed on the left side of the screen



- iii) Use drag and drop feature **or** click on a question type to add a new question to the survey
- iv) Selected questions will be added in the displayed survey page.



### 5.1.2. Available Question Types

BizViz Survey provides with various question types to build an effective survey.

- **Single Answer:** This type of questions are essential questions to restrict respondents to a single option from all the provided options. Selecting an option out of all the provided options will often classify them as members of a particular group. Example, selecting age group, religion, or gender.

How long have you been using your current cell phone?

Less than a year  
  1-2 years  
  3-4 years  
  More than 5 years

- **Multiple Answer:** Respondents are allowed to select one or more options from a list of answers to express their opinion. Multiple choice question type is used, when there are fixed number of options available for a question.

Select all Mobile Brands you have used so far

Apple  
  Motorola(Google)  
  Samsung  
  Xiaomi  
  Nokia (Windows)  
  Others

- **Matrix-Single Answer:** Use this kind of question, if you want respondents to apply the same measurement while answering several related questions. It allows only one answer per row. You also have option to turn the matrix question into a rating scale when you want to assign weights to each answer choice.

Select favorite mobile device brand for each family member.

	Apple	Samsung	Xiaomi
Father	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mother	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brother	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sister	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- **Matrix-Multiple Answer:** Use a Matrix-Multiple Answer question type, if you want respondents to evaluate one or more row items using the same set of column choices. You can set this type of matrix question to collect multiple answers.

Please select the answers that apply to you: ★ ✖

	Talking	SMS	Whats App	Social Media	Games	Work Related	Internet
I use my phone for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My 3 most used applications are (select 3)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I need to upgrade my phone plan so I can do more	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I use my phone in the office for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **Rating Scale:** Questions formed under this type are generally to measure opinions or attitudes of the desired audience. It is to rate a single aspect or thing alongside a spread out range of possible choices/options. Rating is predefined for these questions. E.g. Customer satisfaction survey questions.

How the following factors influence your mobile device purchase? ✖

	not at all	somewhat	very much
Price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Screen Size	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
OS Features	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brand	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- **Multiple Textbox:** This question type is used to collect multiple short responses for a single question. It includes both, numerical and textual responses. ‘Required’ validation can be applied to this question type. E.g. Personal Details of an individual

Provide your personal details ✖

**Name**

**Date of Birth**

**Address**

**Email ID**


- **Text Box:** In order to collect single short text or numerical responses from the respondents single Text Box can be used. It can be validated to turn it into a compulsory question. E.g. Pin Code, Designation.

Please enter your favorite mobile device brand. ✖

- **Comment:** It is difficult to provide specific pre-set answer options to open-ended survey questions, therefore respondents are required to type their responses into a comment box. Respondents are free to choose the wordings and length of responses. Collected responses can then be viewed separately or through some text analysis tools. Questions falling under this type are often not mandatory to respond.


Please provide your feedback on your current mobile phone. What else do you expect from your smart phone? ★ ✖

- **Numerical Text Box:** Numerical short responses can be collected by using this question type. Alphabetical keyboard is disabled to restrict the respondents to use only numbers.

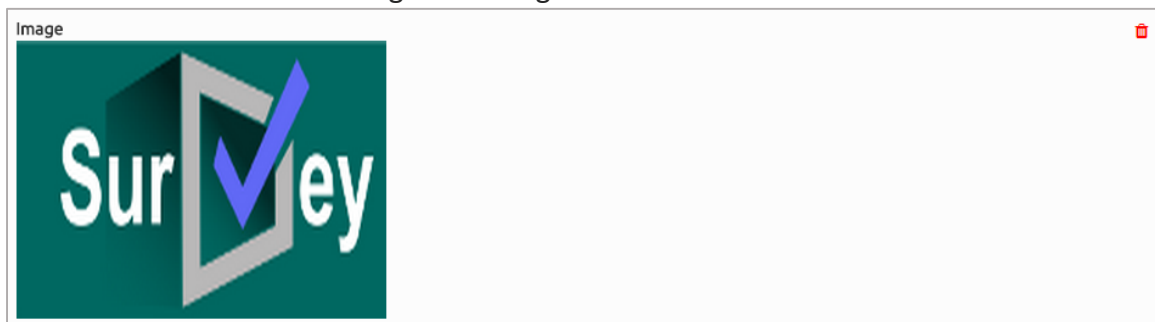
Howmany mobiles are owned by your family? 


Answer Here

- **Descriptive:** This question type is used to write description about different sections. It supports smiles and html in the body.

This short survey on your mobile phone usage would only take about 3 minutes of your time. This survey will give you 'Real Time Analytics' and 'Benchmark Analysis'. 

- **Image:** Insert an image into your survey by uploading an image file or specifying the URL of an image on the web. The chosen image should not exceed size limit of 1 MB. This type of question can be associated with descriptive, text box, numerical text box, or comment in order to get meaningful outcome.

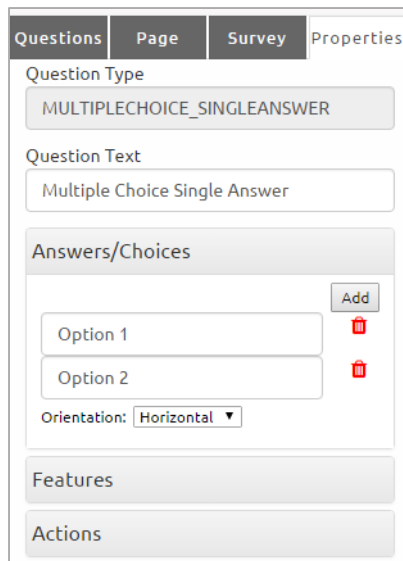


Note: Delete  option is provided with each question to remove any inserted question from the survey page.

## 5.2. Properties

All the question related properties are covered under this section. It also consists various types of logic and question validation option.

- Selecting a Question Type from the 'Questions' will redirect to 'Properties' option
- 'Properties' will display question specific properties. Such as:

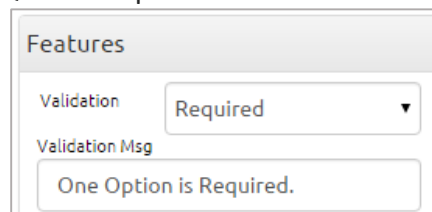


- a. **Question Type:** Question type is pre-selected
- b. **Question Text:** Question Text can be inserted or modified
- c. **Options:** Options can be added, modified, and deleted
- d. **Orientation: Horizontal** or **Vertical** orientation can be selected from the drop-down menu
- e. **Features:** Features include various options to be applied on a selected question. Such as:

- **Validation**

It restricts skipping of the questions by the recipients while taking a survey. Recipients will have to attend all the validated questions in order to move ahead in the Survey. Application of the validation option can be determined by the survey goal and pattern. Validation can be provided to all the available question types under the BizViz Survey App.

- i) Click on '**Features**' option from the left side of the '**Properties**' screen
- ii) '**Validation**' option will be displayed
- iii) Select '**Required**' from the drop down menu
- iv) Question specific Validation message will appear in the below given box



- v) All the Validated Questions will appear with  symbol

**Your Age Group** ★

Below 18 Years  18-25 Years  26-35 Years  36-50 Years  51-65 Years  Above 65 Years

---

**Your Gender** ★

Female  Male

---

**Which type of phone are you using?** ★

Smart Phone  Normal Phone

---



**How long have you been using a Smart Phone?** ★

Less than 1 year  1-3 years  More than 5 years


• **Show Comment Box**

Comment Box is an optional feature provided under properties.

- i) Click on **'Features'** option from the left side of the **'Properties'** screen
- ii) Select **'Show Comment Box'** option by a tick mark in the check box
- iii) Fill in the below mentioned fields:

- a. **Number of Rows:** Set rows by using  button
- b. **Text Limit:** Set text limit using  button
- c. **Text limit message:** Enter a message to display when text limit is exceeded
- d. **Comment Head:** Enter a heading for the inserted comment box

Show Comment Box

Number of Rows(max:20):  

Text Limit(max:1000):

Text Limit Msg:

Comment Head:

- iv) A Comment Box will be added below the selected question

**Your Gender** ★

Male  Female

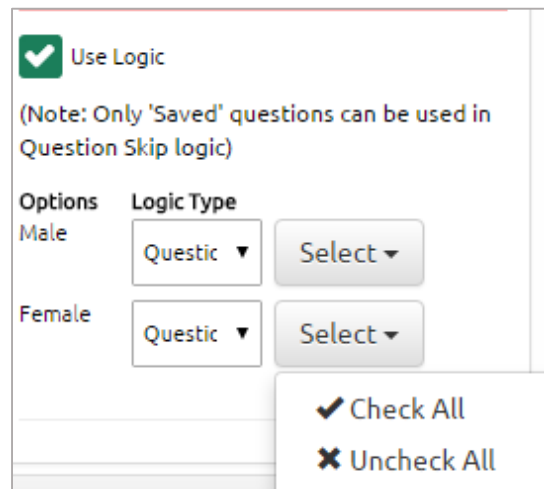
Comment Box :

200 characters remaining

• **Use Logic**

The aim of logic is to guide the respondents on a specific path for successful completion of the survey. It also helps in getting desired responses from the selected group of participants.

- i) Click on '**Features**' option from the left side of the '**Properties**' screen
- ii) Select '**Use Logic**' option by a tick mark in the check box
- iii) **Options** and **Logic Type** will be displayed
- iv) Select a logic type that you wish to apply the given option
- v) '**Select**' dropdown menu will be displayed
- vi) Select '**Check All**' option from the drop down menu

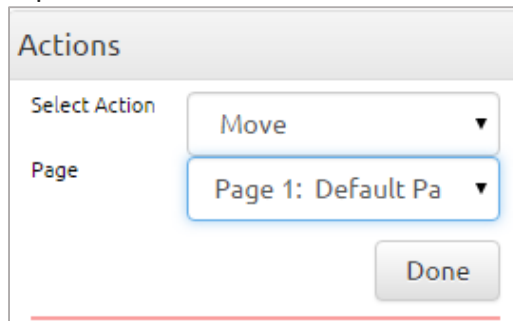


BizViz Survey platform uses below mention logic types:

1. **Page Jump:** It is applied to a page. It enables all the respondents to access the immediate next page in the survey. Irrespective of the answers chosen by the respondents, they will be taken to the next page of the survey.
  2. **Question Skip:** It enables the respondents to proceed on the next question or page based on the answer selected by them. This logic is applied directly to the question.
  3. **Disqualification:** Essentially, this logic is applied to multiple choice questions to disqualify the respondents who fail to meet the required criteria for continuing the survey. A disqualification message will be shown to them restricting their further progress in the survey.
  4. **End of Survey:** This logic is generally used after the last question given for the survey to generate Survey completion message for the recipients. It can be applied to a specific question, from where the organizer want certain respondents to end the survey process.
- f. **Actions:** This option is applied to a question in order to move it on any desired page out of all the created pages for a survey.
- i) Click on '**Actions**' from the left side of the '**Properties**' screen



- ii) **'Select Action'** and **'Page'** options will be displayed
- iii) Select **'Move'** from the **'Select Action'** drop down menu
- iv) Select a page from the **'Page'** drop down menu
- v) Click on **'Done'**
- vi) The question will be moved on the selected page



### 5.3. Inserting a New Page

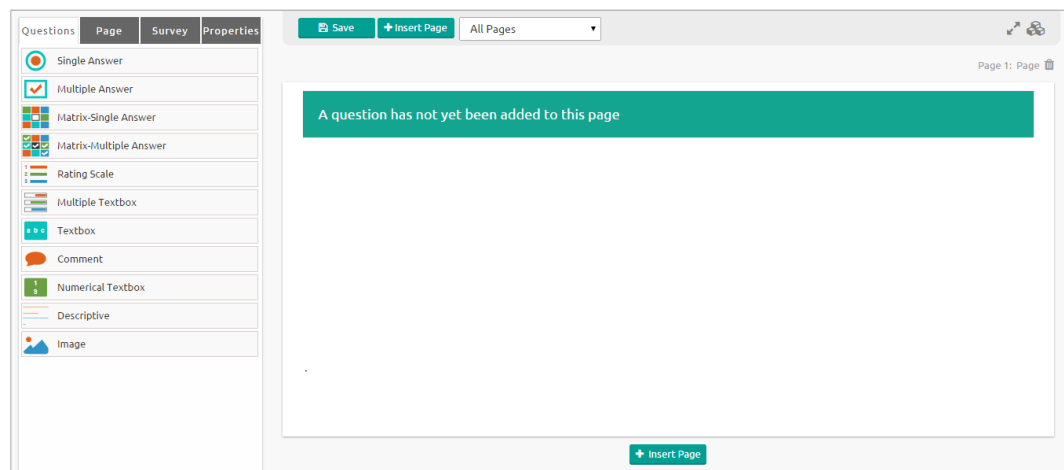
There are two options for inserting a new page in the survey.

#### 1. Insert Page Option at the top of the screen

- i) Click on **'+ Insert Page'** option from the top of the screen
- ii) A new page will be inserted before the existing page

#### 2. Insert Page Option at the bottom of the screen

- i) Click on **'+ Insert Page'** option from the bottom of the screen
- ii) A new page will be inserted after the existing page



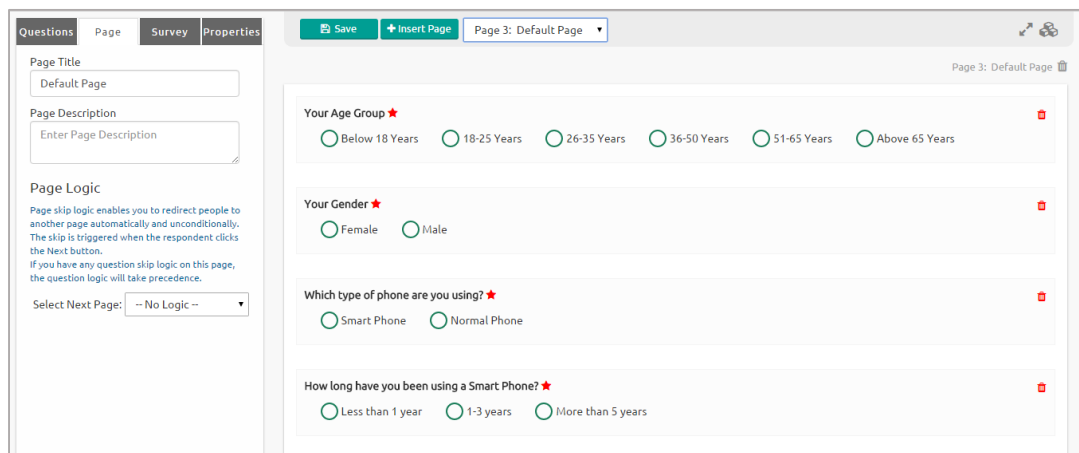
**Note:**

- a. The newly added page will open with a message that no question has yet been added to that page.

- b. User can delete a page by clicking on  option provided at the top right side of each page.

#### 5.4. Page: Editing an Existing Page

- i) Select any one page from the 'All Pages' drop-down menu
- ii) Click on 'Page' option from the task bar
- iii) Properties of the page will open on the left side of the screen
  1. Page Title
  2. Page Description
  3. Page Logic
- iv) User can modify all the properties of the selected page

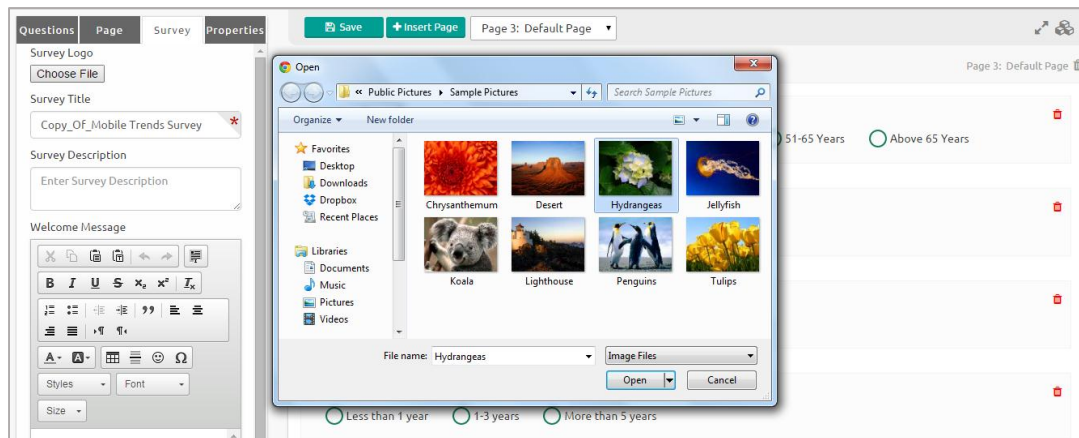


#### 5.5. Survey Option

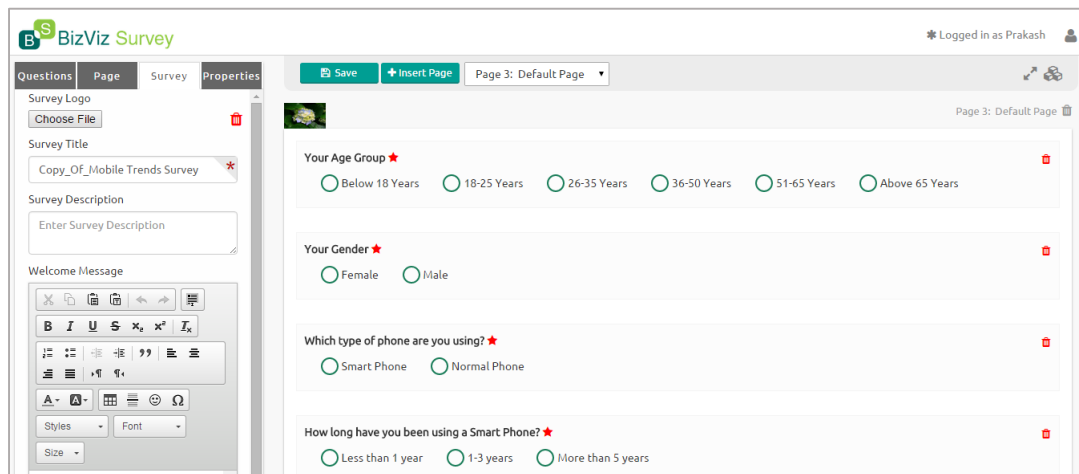
Survey option enables the user to insert a Survey Logo and edit/modify the 'Create Survey' screen.


##### 1. Adding a Survey Logo

- i) Click on 'Survey' option from the task bar
- ii) Click on 'Choose File' option
- iii) Select an image or logo you desire to upload from the current system
- iv) Click on 'Open' to upload the image/ logo



v) The uploaded image or logo will be added to all pages of the survey

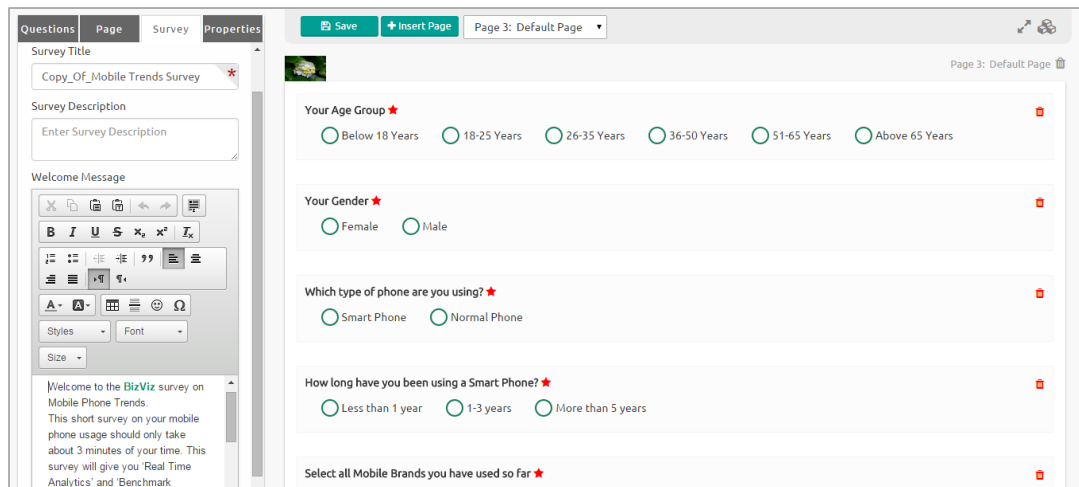


vi) Click on  icon provided next to the 'Choose File' option in order to remove the Survey logo

**Note:** Survey logo can be replaced, if desired.

## 2. Editing the 'Create Survey' Screen from Survey Option

- i) Click on 'Survey' option from the header panel
- ii) 'Create Survey' screen details will be displayed on the left side of the page. It covers:
  - a. Survey Title,
  - b. Survey Description,
  - c. Welcome Message
- iii) These details can be edited/ modified (if desired)



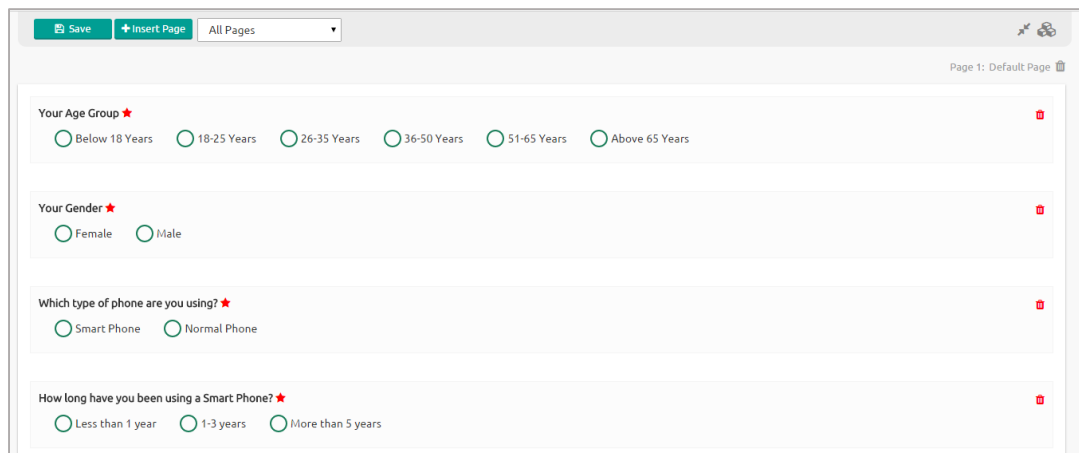
### 5.6. Saving a Survey


- i) Select 'Save' option from the header panel to save the changes or modifications
- ii) All the changes will be saved in the survey
- iii) After all the modifications are successfully saved, 'Questions' will open by default

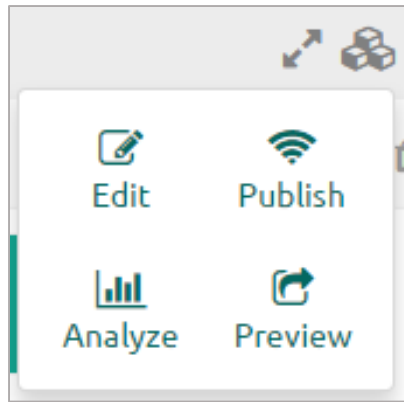
**Note:** While inserting questions to a survey, it will save only those questions for what 'Save' option was clicked.





### 5.7. Other Icons

- i) Clicking on  icon will open all the inserted survey questions in full screen view



- ii) Clicking on  icon will open more functions to be performed on the survey. Such as:




- a. Edit Questions 
- b. Publish Survey 
- c. Analyze Survey 
- d. Preview Survey 

## 6. Publishing a Survey

After designing part of a survey gets over, it can be published via Weblink or email to collect responses.

### 6.1. Publish Survey

- i) Click on **'Publish Survey'**  option from platform home screen
- ii) A new screen entitled **'Publish Survey'** will open
- iii) Fill in the required details
  - a. Publish Name
  - b. Start Date
  - c. Expiry Date
  - d. Expiry Date Message
- iv) Click on **'Create'**

**Publish Survey**

Selected Survey : Mobile Trends Survey

Publish Name :  \*

30 characters remaining.

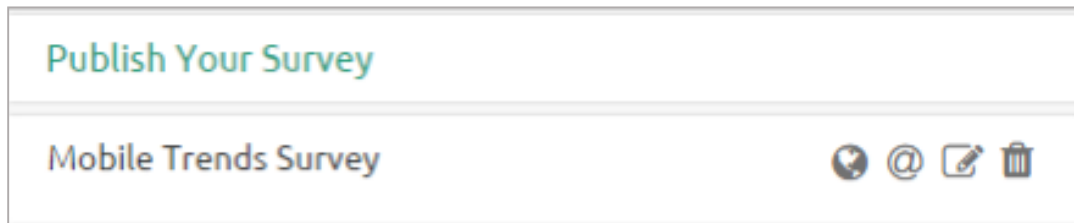
Start Date :  \*

Expiry Date :  \*





Expiry Date Message:  \*

Create

- v) The survey will be published successfully
- vi) It will be displayed under '**Publish Your Survey**' screen with four icons




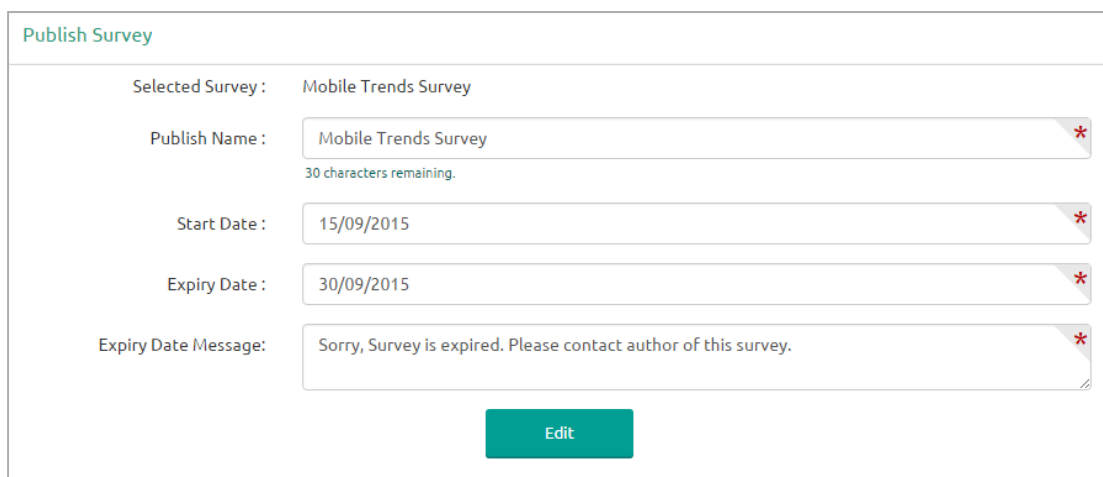
vii) Description of the icons:

Sl. No.	Icon	Task Assigned
1		Add Weblink Collector
2		Add Email Collector
3		Edit Publish
4		Delete Publish

**Note:** Description of both the collectors is covered under topic no. 7.


## 6.2. Editing a Publish

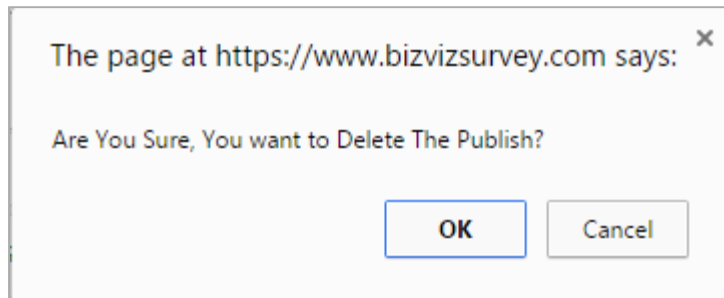
- i) Go to '**Publish Your Survey**' screen
- ii) Click on '**Edit**'  icon
- iii) It will redirect the user to '**Publish Survey**' details displayed on the right side of the pane
- iv) You may edit below mentioned details:
  - a. Publish Name,
  - b. Start Date,
  - c. Expiry Date
- v) Click on '**Edit**' option



vi) '**Publish Survey**' information will be updated successfully

### 6.3. Deleting a Publish

- i) Go to **'Publish Your Survey'** screen
- ii) Click on **'Delete'**  icon
- iii) A Pop-up screen will appear to confirm deletion
- iv) Click on **'OK'** to delete the publish



- v) A message will appear to confirm the deletion
- vi) The chosen publish will be removed from the list of publish

## 7. Collector(s)

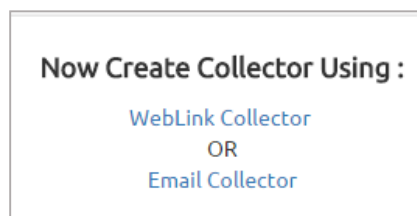
Collector is an integral part of **'Publish Survey'**. Basically, Collector is an online link that can be sent to the end users. Collectors are used to record collected responses from the recipients which can then be used for in-depth analysis.

A single survey can have many collectors to compare the responses collected at different period of time.

### 7.1. Collector Options



BizViz Survey platform provides with two ways to get collector option:

- i) Click on **'Create'** option from the **'Publish Survey'** screen
- ii) The user will be provided with the two options to create collector



- iii) User can select any one option by a click on it


**OR**

- i) Go to **'Publish Your Survey'** screen
- ii) Four icons will be provided next to the Publish Name
- iii) The First two icons (  and  ) can be used to add a new collector

iv) User can click on any icon to add the collector



### 7.2. Creating a Weblink Collector

- i) Go to 'Publish Your Survey' screen
- ii) Click on  icon
- iii) 'Create Weblink Collector' screen will appear
- iv) Enter 'Collector Name' (Maximum limit given is of 50 characters)
- v) Click on 'Create' option

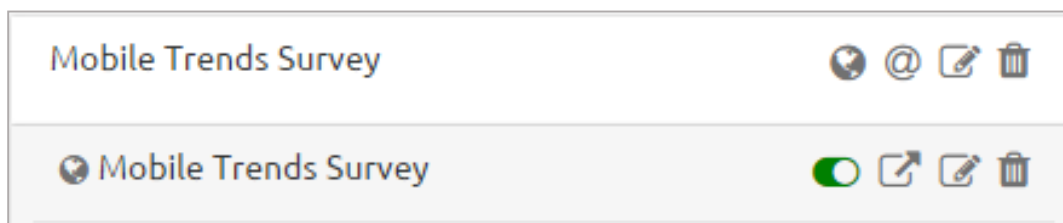
**Create Weblink Collector**

Collector Name:  \*  
30 characters remaining.






Close Collector Message:  \*

[Create](#)

vi) The Web Link Collector will be successfully created and added to the 'Publish Your Survey' screen



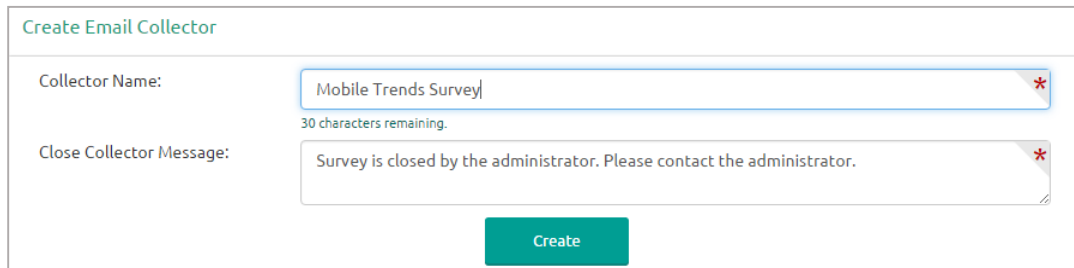
vii) Explanation of the various icons provided for a Weblink collector

Sl. No.	Icon	Allotted Function
1.	 or 	Switch On/Off button to enable or disable the Weblink
2.		View URL (link)
3.		Edit Weblink Collector: Edit collector settings for the end users
4.		Delete the created collector

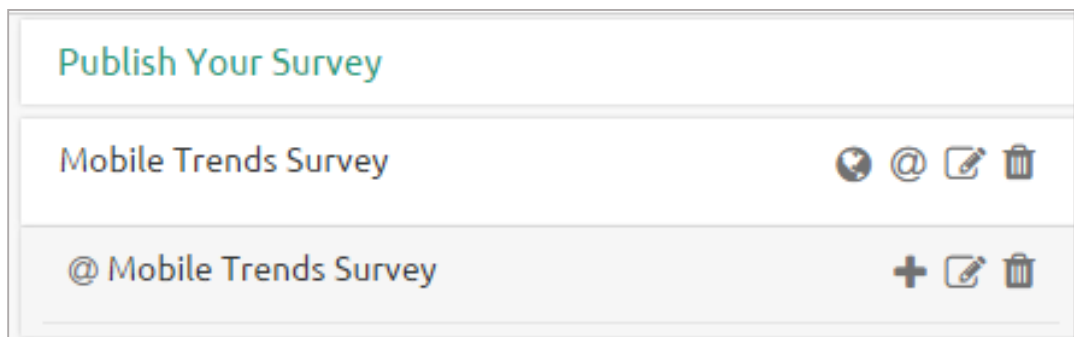


### 7.3. Creating an Email Collector




- i) Go to ‘**Publish Your Survey**’ screen
- ii) Click on @ icon
- iii) ‘**Create Email Collector**’ screen will appear (on the right panel)
- iv) Enter ‘**Collector Name**’ (Maximum limit given is of 50 characters)
- v) Click on ‘**Create**’ option



- vi) The Email Collector will be successfully created and added to the ‘**Publish Your Survey**’ screen (on the left panel)



- vii) Explanation of the various icons provided for an email collector

Sl. No.	Icon	Allotted Function
1.		Add Recipients to email collector
2.		Edit Email Collector: Edit collector settings for the end users
3.		Delete the created collector

### 7.4. Adding Recipients for Email Collector


- i) Click on ‘**Create**’ from ‘**Create Email Collector**’ screen
- ii) It will redirect to ‘**Add Recipient For Collector**’ screen
- iii) Fill in the necessary details in the fields. Such as:
  - a. **Add Recipients:** Add names of the recipients either from the ‘**Contact Groups**’ or insert manually
  - b. **Email Subject:** Enter a Subject

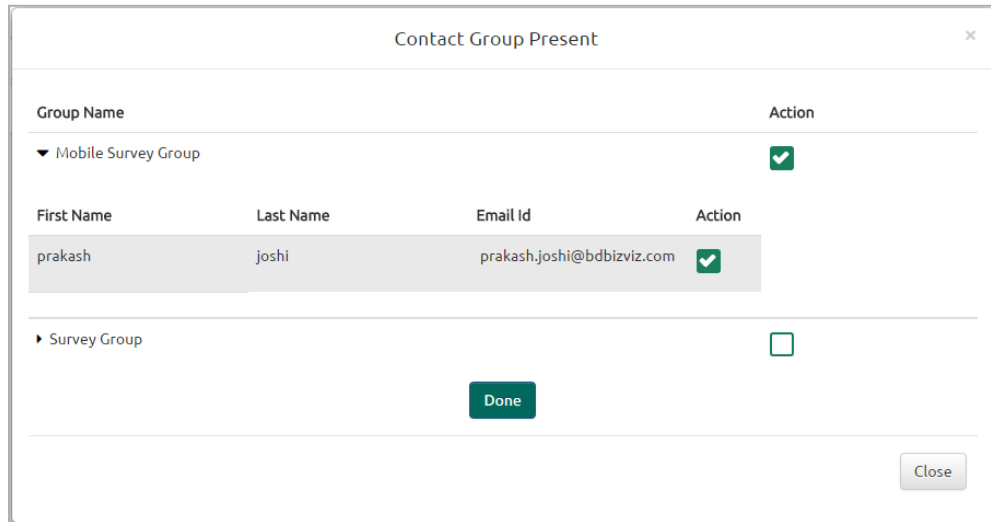
- c. **Body of Email:** It displays a prewritten message. This message can be modified.
- iv) Click on '**Add Link**' option to add the collector link
- v) Click on '**Create & Send Mail**' option
- vi) A mail will be sent to the added recipient(s)

**Note:** Collector name will be displayed, but it cannot be changed or modified from this screen.

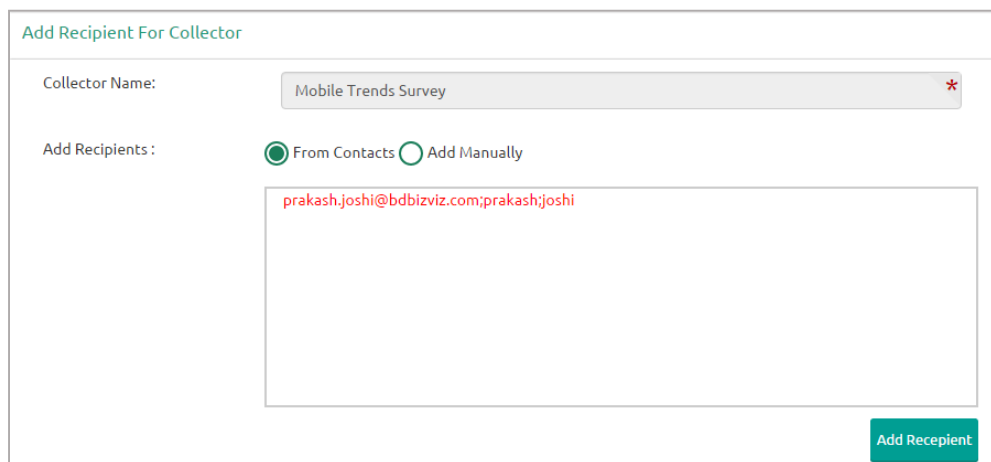
### 1. Adding Recipients from Contacts

- i) Go to '**Add Recipients for Collector**' screen
- ii) Select '**From Contacts**' option to add recipients

- iii) Click on **'Add recipients'** option provided below the box
- iv) A pop-up screen entitled **'Contact Group Present'** will open
- v) Click on  button provided on the left side of the Contact Group Name
- vi) Contact details will be displayed below the contact group name
- vii) Select **'Action'** option provided next to the contact details (by a tick mark)
- viii) Select **'Action'** option provided next to the Contact Group Name (by a tick mark)
- ix) Click on **'Done'** option



- x) Recipients will be successfully added from the selected contact group as displayed below:



## 2. Adding Recipients Manually

- i) Go to **'Add Recipients for Collector'** screen
- ii) Select **'Add Manually'** to add recipients
- iii) Manually add recipients' details into the given space
- iv) Follow the below mentioned format to add the recipient name  
[email@email.com;first name;last name](mailto:email@email.com;first name;last name)

**Add Recipient For Collector**


Collector Name:  \*

Add Recipients:  From Contacts  Add Manually

prakash.joshi@bdbizviz.com;prakash;joshi|

(If adding manually please Enter one recipient detail in one line in the order mailid,firstname,lastname seprated by semicolon(;)) For Example. john@gmail.com;John;Peterson)

## 7.5. Editing Collector(s)

- i) Go to '**Publish Your Survey**' screen
- ii) Click on '**Edit**'  option given besides the Collector name
- iii) '**Edit Collector**' will be displayed on the right panel of the screen
- iv) Below mentioned details can be edited for a collector
  - a. Collector Name.
  - b. Close Collector Message
  - c. Collector Settings
- v) Click on '**Edit**' to save the updates

### • Editing Collector Settings

Collector settings include **BizViz Analytics for End User** and **Benchmark Analysis for End User**

#### 1. Editing BizViz Analytics for End User

- i) Go to '**Edit Collector**' Screen
- ii) Select '**BizViz Analytics for End User**' option by a tick mark
- iii) Carefully select below mentioned details:
  - a. **Select Questions:** Select a question from the drop down menu to apply BizViz Analytics.
    - i. '**Check All**' will enable the questions
    - ii. '**Uncheck All**' will disable the questions
  - b. **Public Link Status:**
    - i. Select '**ACTIVE**' option to enable the link
    - ii. Select '**IN-ACTIVE**' option to disable the link

**Note:** '**Public URL**' link will be displayed below the '**Public Link Status**', (If '**ACTIVE**' option is selected)

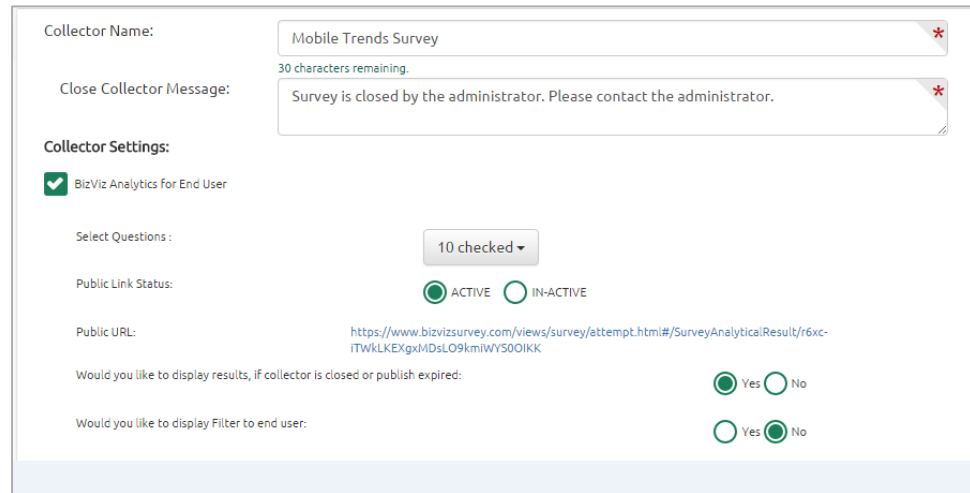
#### c. Display Result Option:

- i. Select any one option out of '**Yes**' or '**No**'
- ii. Selecting '**Yes**' will display the result to the end user, even if the collector is closed or publish has been expired

#### d. Display Filter Option:

- i. Select any one option out of '**Yes**' or '**No**'

ii. Selecting 'Yes' will display the applied filters to the end user



Collector Name:  \*  
30 characters remaining.

Close Collector Message:  \*

**Collector Settings:**

BizViz Analytics for End User

Select Questions:

Public Link Status:  ACTIVE  IN-ACTIVE

Public URL: <https://www.bizvizzsurvey.com/views/survey/attempt.html#/SurveyAnalyticalResult/r6xc-ITWkLKEXgxMDsLO9kmWY50OIKK>

Would you like to display results, if collector is closed or publish expired:  Yes  No

Would you like to display Filter to end user:  Yes  No

## 2. Editing Benchmark Analysis for End User

- i) Select 'Benchmark Analysis for End User' option by a tick mark
- ii) Carefully select below mentioned details:

### a. Public Link Status:

- i. Select 'ACTIVE' option to enable the link
- ii. Select 'IN-ACTIVE' option to disable the link

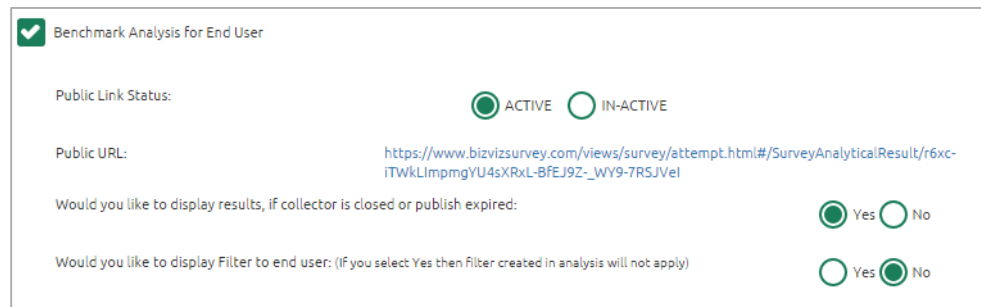
**Note:** 'Public URL' link will be displayed below the 'Public Link Status', (If 'ACTIVE' option is selected)

### b. Display Result Option:

- i. Select any one option out of 'Yes' or 'No'
- ii. Selecting 'Yes' will display the result to the end user, even if the collector is closed or publish has been expired

### c. Display Filter Option:

- i. Select any one option out of 'Yes' or 'No'
- ii. Selecting 'Yes' will display the applied filters to the end user



Benchmark Analysis for End User

Public Link Status:  ACTIVE  IN-ACTIVE


Public URL: [https://www.bizvizzsurvey.com/views/survey/attempt.html#/SurveyAnalyticalResult/r6xc-ITWkLImpmgYU4sXRxL-BFEJ9Z\\_WY9-7RSJVeI](https://www.bizvizzsurvey.com/views/survey/attempt.html#/SurveyAnalyticalResult/r6xc-ITWkLImpmgYU4sXRxL-BFEJ9Z_WY9-7RSJVeI)

Would you like to display results, if collector is closed or publish expired:  Yes  No

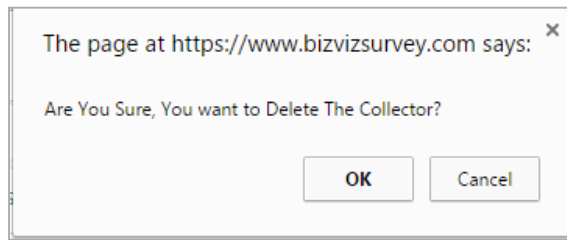
Would you like to display Filter to end user: (If you select Yes then filter created in analysis will not apply)  Yes  No

**Note:** Collector Settings are the same for Weblink and Email collectors.

## 7.6. Deleting Collector(s)

- i) Go to 'Publish Your Survey' screen to access delete collector option
- ii) Click on **Delete**  option provided besides a collector name

- iii) A pop-up screen will appear to confirm deletion
- iv) Click on 'OK' option




- v) The selected collector will be deleted

**Note:** Same set of steps can be followed to delete Weblink and Email collector.

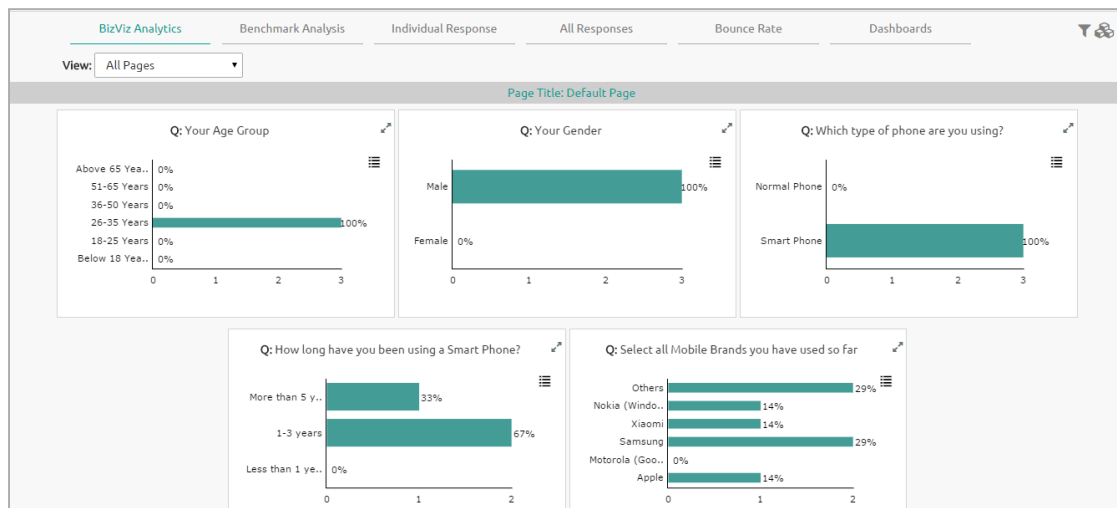
## 8. Analyzing Result for a Survey

Collected Survey responses are displayed through advanced visualization in this segment.

- i) Go to Survey platform home screen
- ii) Click on  icon to access 'Analyze Result' option
- iii) It will redirect the user to a new screen
- iv) Various analytical options are displayed in the header panel
- v) Clicking on each option will open either a visual or information in the full screen

### 8.1. BizViz Analysis

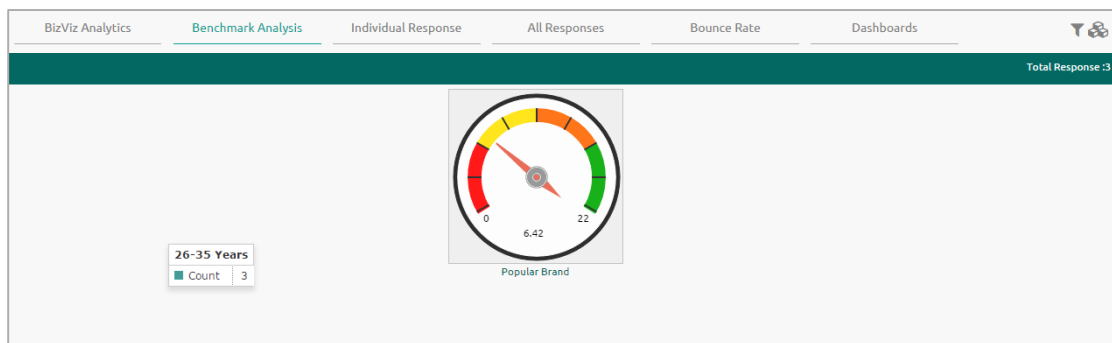
It is an Analysis of survey responses through graphical charts



**Note:** BizViz Analysis opens by default as being the first given option of this segment.

### 8.2. Benchmark Analysis

Graphical depiction of a Benchmark Value for the selected goal is displayed through this option.



### 8.3. Individual Response

Response recorded from an individual for all the questions of a survey is presented through this option.

The screenshot shows the 'Individual Response' dashboard. Navigation tabs include BizViz Analytics, Benchmark Analysis, Individual Response (selected), All Responses, Bounce Rate, and Dashboards. The interface includes a 'View:' dropdown set to 'All Pages', a 'Jump to:' dropdown set to 'Response 1', and a 'Displaying 1st of 3 Responses' indicator. Below this, there is a 'Delete Response' button and metadata for the collector: Collector Title (Mobile Trends Survey), Collector Type (WEB\_LINK), IP Address (115.119.248.130), and Collector Status (OPEN). The main section displays a list of survey questions and their corresponding answers:

- Q: Your Age Group: 26-35 Years
- Q: Your Gender: Male
- Q: Which type of phone are you using?: Smart Phone
- Q: How long have you been using a Smart Phone?: 1-3 years
- Q: Select all Mobile Brands you have used so far: Samsung, Others,

### 8.4. All Responses:

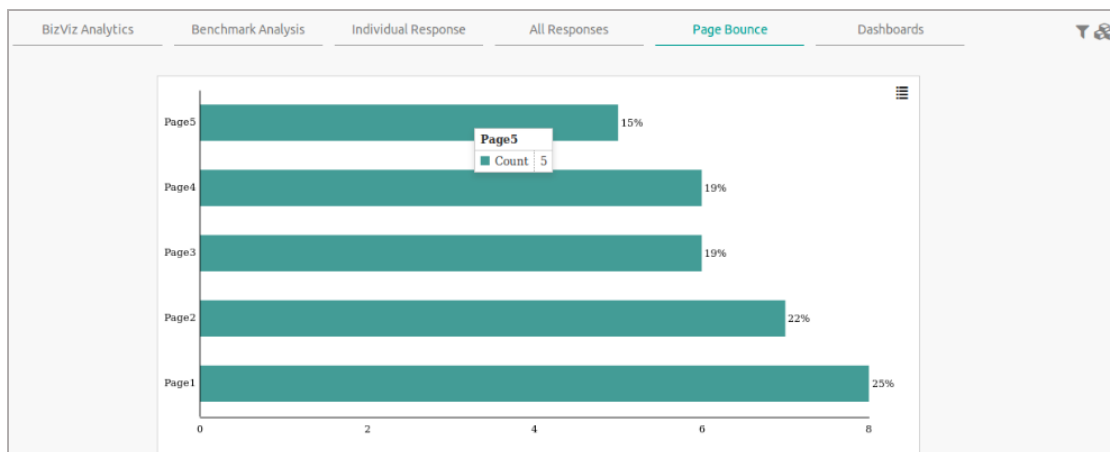
All the responses recorded from all the recipients for a survey are presented through this option.

The screenshot shows the 'All Responses' dashboard. Navigation tabs include BizViz Analytics, Benchmark Analysis, Individual Response, All Responses (selected), Bounce Rate, and Dashboards. A '15 checked' dropdown and an 'Export in Excel' button are visible. The main content is a table with the following columns: Index, Response ID, From IP, Collector Type, Collector Name, AttemptedDate, Your Age Group (sub-columns: Below 18 Years, 18-25 Years, 26-35 Years, 36-50 Years, 51-65 Years, Above 65 Years), Your Gender (sub-columns: Female, Male), and Which type of phone are y (sub-columns: Smart Phone, Norm). The table contains three rows of data:

Index	Response ID	From IP	Collector Type	Collector Name	AttemptedDate	Your Age Group						Your Gender		Which type of phone are y	
						Below 18 Years	18-25 Years	26-35 Years	36-50 Years	51-65 Years	Above 65 Years	Female	Male	Smart Phone	Norm
1	212533251	115.119.248.130	WEB_LINK	Mobile Trends Survey	Sep 24, 2015 5:47:58 AM			26-35 Years					Male	Smart Phone	
2	212533250	115.119.248.130	WEB_LINK	Mobile Trends Survey	Sep 24, 2015 5:44:10 AM			26-35 Years					Male	Smart Phone	
3	212533249	182.156.90.202	WEB_LINK	Mobile Trends Survey	Sep 24, 2015 5:20:48 AM			26-35 Years					Male	Smart Phone	

### 8.5. Bounce Rate

It points out when exactly a survey was ended by its recipients. Page wise proportions of responses are presented through an advanced analytical chart.



### 8.6. Dashboards

This option will redirect the user to place a dashboard request. User need to fill in the required fields and click on ‘Submit’ to place a request.

**Dashboard Request**

Name : \*

Email : \*

Message :

Dashboard for Survey :

According to the placed request client specific dashboards will be displayed on the left panel of the ‘Dashboards’ screen.

**Create Dashboards Using Survey Data**

Export your survey data on cloud using our DataMart feature and start creating your own dashboard & infographics using our BizViz Dashboard Designer tool in the Platinum Plan.

[Sample Dashboard](#)

**Dashboard Request**

Name : \*

Email : \*


Message :

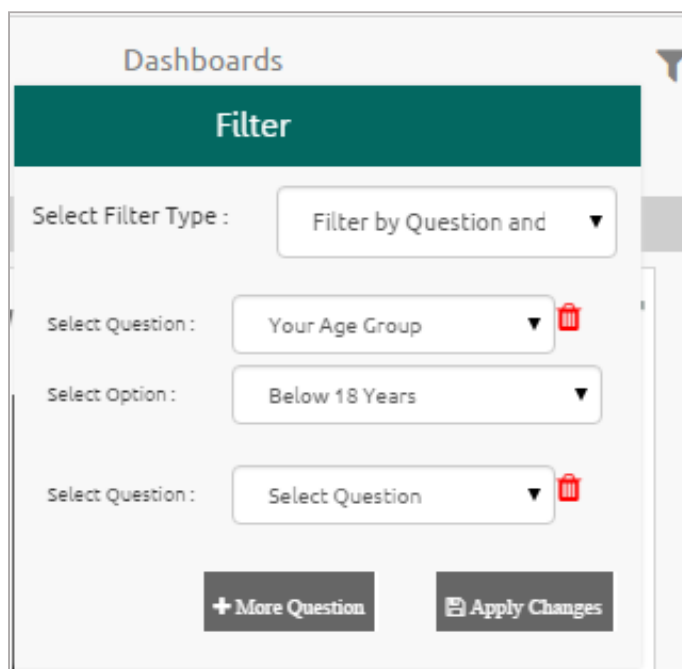
Dashboard for Survey :



### 8.7. Applying Filter(s)


Filters are provided to generate customized analytic reports for a survey. User can apply multiple filters at a time to derive a specific insight into the collected survey responses.

- i) Go to **'Analyze Result'** screen
- ii) Click on **'Filter'**  icon from the top right side of the screen
- iii) A pop-up screen will appear
- iv) Select a filter type from the drop down menu
- v) After selecting a filter type, it will redirect the user for selecting questions
- vi) Click on **'More Question'** to select more questions
- vii) Click on **'Apply Changes'** to apply filter to the selected questions




Note: User is advised to use maximum five filter options on a survey.

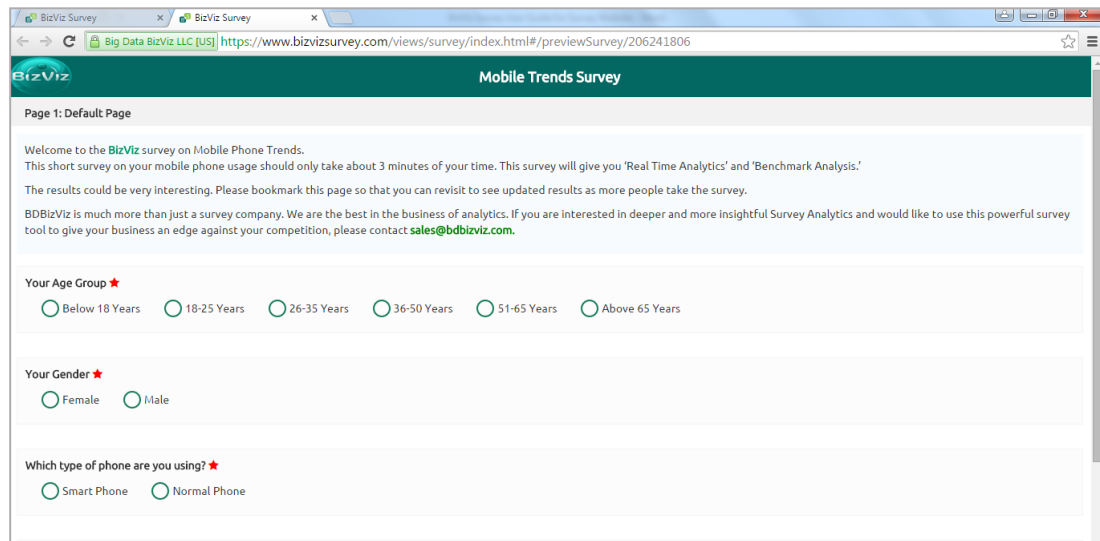
### 9. Other Options


There are some more options to be applied on a survey. User can access them all by clicking on  icon provided besides a Survey Name on the platform home screen.



## 9.1. Preview Survey

- i) Go to Survey platform home screen
- ii) Click on  option
- iii) A drop down menu will be displayed
- iv) Select **'Preview Survey'** from the drop down menu
- v) It will redirect the user to a new page
- vi) A full screen preview of the selected survey will be displayed




- vii) Click on 'Close'  option (provided for the new page) to close the preview

## 9.2. Benchmark

Benchmark is a standard or point of reference for evaluating performance or level of quality. It is pre-requisite to set goals, before using Benchmark as a logic or point of reference to derive at the desired comparison.

### 9.2.1. Accessing Benchmark Option

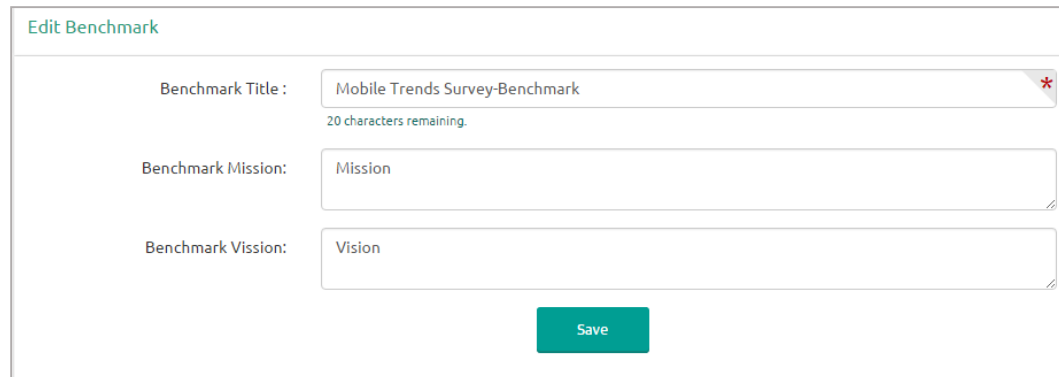
- i) Go to Survey platform home screen
- ii) Click on  icon to access a drop down menu
- iii) **'Benchmark'** option can be accessed from the drop down menu

### 9.2.2. Creating and Editing a Benchmark

- i) Select **'Benchmark'** option from the dropdown menu
- ii) It will redirect the user to **'Edit Benchmark'** screen
- iii) A new Benchmark will be created and entitled as **'Survey title-Benchmark'**

E.g. Mobile Trend Survey will have a benchmark entitled '**Mobile Trend Survey-Benchmark**'

- iv) User can edit the below mentioned fields (if desired). Such as:
  - a. Benchmark Title
  - b. Benchmark Mission
  - c. Benchmark Vision
- v) Click on '**Save**' option to save the updates (if any)



### 9.2.3. Adding Goal to a Benchmark

- i) Clicking on '**Save**' option from the '**Edit Benchmark**' screen will redirect the user to add benchmark goals
- ii) '**Create Benchmark Goal**' screen will be displayed
- iii) Fill in the below given fields:
  - a. Goal Name
  - b. Goal Description
  - c. Upper Threshold
  - d. Lower Threshold
  - e. Operation on Goal Question Values: Select an option from the drop down menu
  - f. Is High Value True: Select an option from the drop down menu
- iv) Click on '**Save**' option

### Create Benchmark Goal

Benchmark Name : Mobile Trends Survey-Benchmark

Goal Name : Popular Brand \*  
37 characters remaining.

Goal Description :

Upper Threshold : 22

Lower Threshold : 1

Operation On Goal Question Values : Average


Is High Value True : True

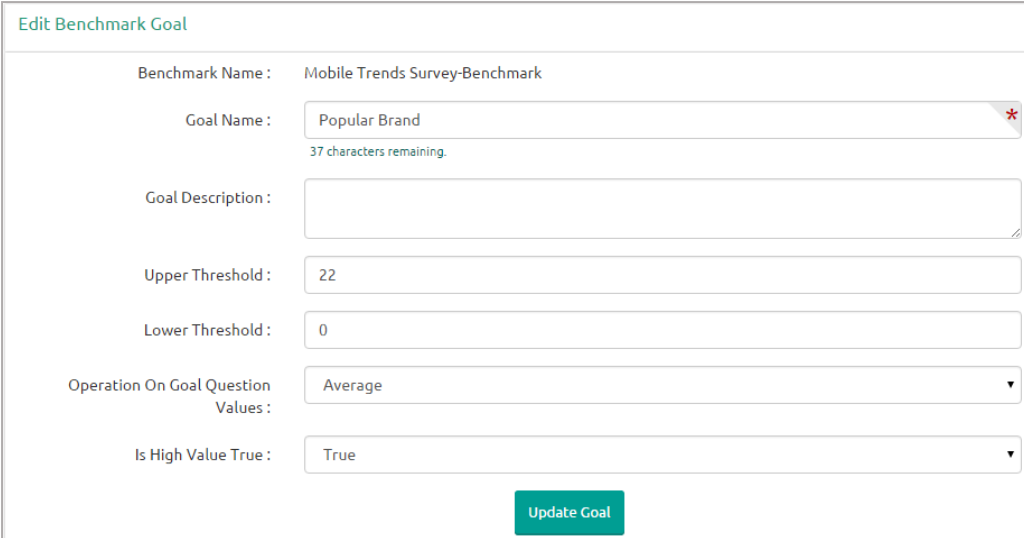
**Save**

v) A Benchmark goal will be added successfully

Note: It is advisable to select **'True'** option for **'Is High Value True'** filed.


#### 9.2.4. Editing a Benchmark Goal

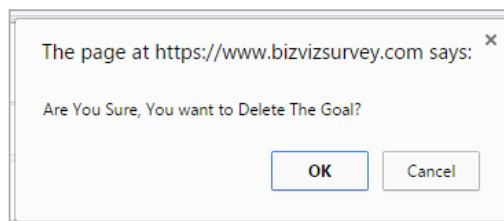
- i) Select **'Edit'**  option given besides the Benchmark goal name (from the left panel of the screen)
- ii) It will redirect the user to the **'Edit Benchmark Goal'** screen (on the right panel of the screen)
- iii) Edit the below mentioned details (if desired)
  - a. Goal Name
  - b. Goal Description
  - c. Upper Threshold
  - d. Lower Threshold
  - e. Operation on Goal Question Values: select an option from the drop down menu
  - f. Is High Value True: Select an option from the drop down menu
- iv) Click on **'Update Goal'** option



v) All the modifications will be saved/ updated successfully

### 9.2.5. Deleting a Benchmark Goal

- i) Select '**Delete**'  option given besides the Benchmark goal name (from the left panel of the screen)
- ii) A pop-up message will appear to confirm deletion
- iii) Select '**OK**' from the pop-up screen



iv) Selected Benchmark goal will be deleted

### 9.2.6. Adding Questions to a Benchmark Goal

- i) Clicking on '**Save**' option will redirect the user to '**Add Questions for Goal**' screen
- ii) Select Questions from the drop down menu

**Add Questions For Goal**

Survey Name : Mobile Trends Survey

Benchmark Name : Mobile Trends Survey-Benchmark

Goal Name : Popular Brand

Select Questions :  \*

- iii) It will redirect the user to **‘Enter Rule Value for Goal’** screen
- iv) Select value for each available answer option
- v) There are three options provided under **‘Operation’** drop down menu:
  - a. Addition
  - b. Multiplication
  - c. Average
- vi) Select an **‘Operation’** to be performed on the answer options
- vii) Click on **‘Done’** option

**Enter Question Rule Value For Goal** ×

Question : Select all Mobile Brands you have used so far


Apple :	<input type="text" value="10"/>
Motorola (Google) :	<input type="text" value="9"/>
Samsung :	<input type="text" value="8"/>
Xiaomi :	<input type="text" value="7"/>
Nokia (Windows) :	<input type="text" value="6"/>
Others :	<input type="text" value="5"/>

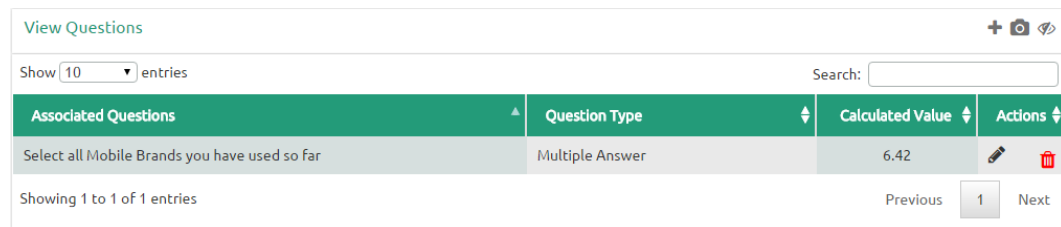
Operation :



- viii) It will redirect the user back to the **‘Add Questions for Goal’** screen
- ix) Click on **‘Save’** option
- x) Selected question will be successfully added to the Benchmark Goal


**Note:** User cannot exceed the set threshold limits while entering question rule value for a goal or selecting an operation.

### 9.2.7. Viewing a Goal Question


- i) Select  icon from the right side of the Benchmark goal screen
- ii) A list view of all the added questions will be displayed as per:
  - a. Associated Questions
  - b. Question Type
  - c. Calculated Value
  - d. Actions

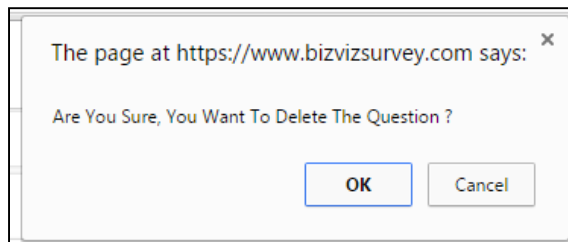


Associated Questions	Question Type	Calculated Value	Actions
Select all Mobile Brands you have used so far	Multiple Answer	6.42	 

**Note:** Clicking on  icon given under ‘**Actions**’ will redirect the user back to ‘**Enter Question Rule Value for Goal**’ screen to modify selected rule value or chosen operation.


### 9.2.8. Deleting a Question from a Benchmark Goal

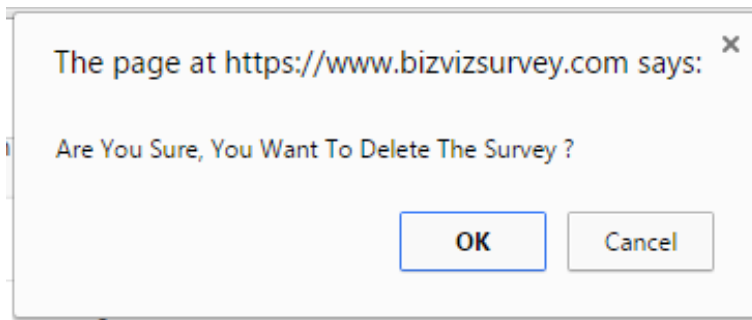
- i) Click on ‘**Delete**’  option from the ‘**View Goal Questions**’ screen
- ii) A pop-up screen will appear to confirm the deletion
- iii) Click on ‘**OK**’ option from the pop-up screen



- iv) Selected question will be deleted successfully


### 9.3. Deleting a Survey

- i) Go to survey platform home page
- ii) Click on  icon provided besides a Survey Name
- iii) A drop down menu will be displayed
- iv) Select ‘**Delete Survey**’ from the drop down menu
- v) A pop-screen will appear to assure the deletion
- vi) Click on ‘**OK**’ from the pop-up screen to delete the survey



### 9.4. Copying a Survey

This option is provided to reuse an existing survey with required modification to collect responses.

- i) Go to Survey platform home screen
- ii) Click on  option
- iii) A drop down menu will be displayed
- iv) Select **'Copy Survey'** from the drop down menu
- v) A new survey will be added to the survey list
- vi) Name of the copied survey will display as **'Copy\_of\_ name of the original Survey'**  
E.g. a copy of Mobile Trends Survey will be renamed as **'Copy\_of\_Mobile Trends Survey'**

Copy_Of_Mobile Trends Survey	   
Created On : 16/09/2015	Responses : 0
Test 2	   
Created On : 15/09/2015	Responses : 0
Test	   
Created On : 14/09/2015	Responses : 0
Mobile Trends Survey	   
Created On : 08/09/2015	Responses : 0

**Note:**


- a. The copied survey will not have any recorded responses in it.
- b. Use can insert new questions or modify the existing questions.

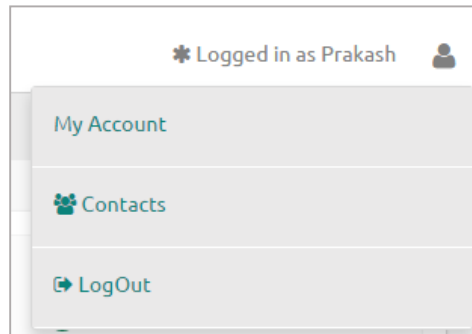
## 10. Contacts

Contacts and contact groups are created to maintain an address book for sharing a survey.



### 10.1. Accessing Contacts Option

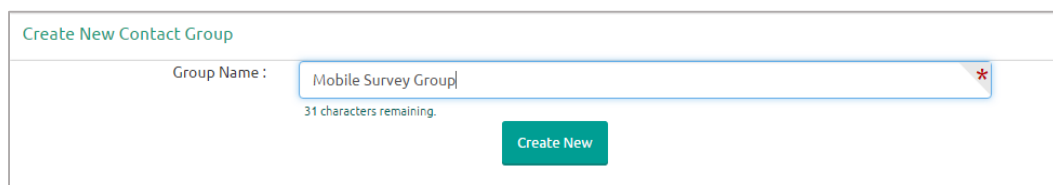
- i) Go to platform home screen
- ii) Click on  icon from the home screen
- iii) A drop down menu will be displayed



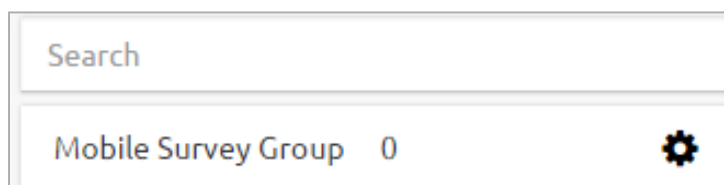
- iv) Select **'Contacts'** option from the drop down menu


### 10.2. Creating a Contact Group

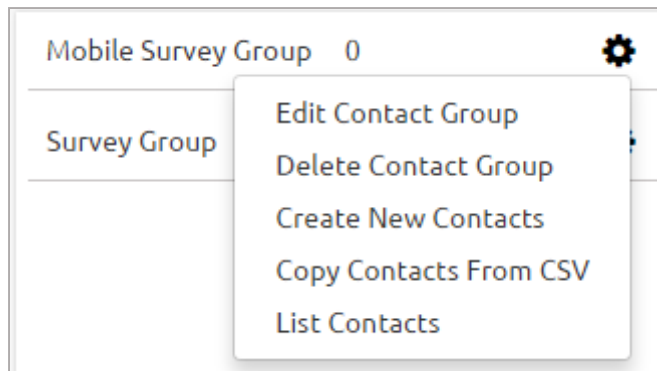
- i) Click on **'Contacts'** option
- ii) It will redirect the user to a new screen
- iii) **'Create New Contact Group'** panel will be displayed on the right side of that screen
- iv) Enter **'Group Name'** in the given field
- v) Click on **'Create New'** Option



- vi) A new contact group will be created and added on the left panel of the screen




**Note:** Clicking on  option will display various functions to be applied on a Contact Group



### 10.3. Creating New Contacts


There are two ways to create new contacts:

#### 10.3.1. Creating New Contacts Manually

- i) Click on  icon from the **'Contacts'** page
- ii) A drop down menu will be opened
- iii) Select **'Create New Contacts'** option from the drop down menu
- iv) **'Create Contacts'** panel will be displayed on the right side of the screen
- v) Enter the below given details manually:
- vi) First Name
- vii) Last Name
- viii) Email
- ix) Mobile No.
- x) Select **'Update'** from the drop down menu provided at the top right side
- xi) Click on **'Create'** option

- xii) Contact will be created and added to the contacts list successfully


#### 10.3.2. Copying Contacts from CSV File



- i) Click on  icon from the **'Contacts'** page
- ii) A drop down menu will be displayed
- iii) Select **'Copy Contacts From CSV'** option from the drop down menu
- iv) **'Create Contact'** panel will be displayed on the right side of the screen

- v) Click on **‘Choose File’** option
- vi) It will redirect the user to upload a CSV file from the current computer system
- vii) Select and upload a CSV file
- viii) Contacts details will be displayed on the screen from CSV file
- ix) Select **‘Update’** from the drop down menu provided at the top right side
- x) Select boxes provided besides the contact details with a tick mark
- xi) Click on **‘Submit’**


- xii) The Contact will be created and added to the contact list successfully

### 10.4. Listing a Contact

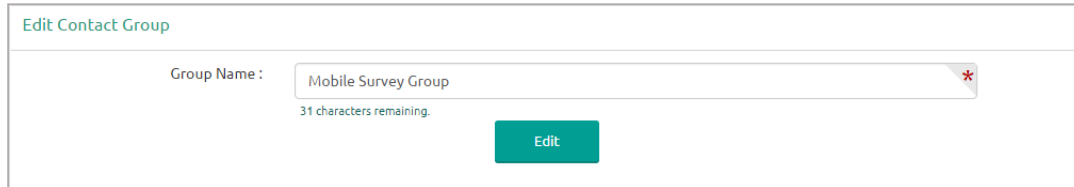
- i) Click on  icon from the **‘Contacts’** page
- ii) A drop down menu will be displayed
- iii) Select **‘List Contacts’** option from the drop down menu
- iv) **‘Contact List’** details of all the created contacts will be displayed on the right panel
- v) Contact details of all the created contacts will be listed

FirstName	LastName	EmailId	Mobile	Action
nidhi	joshi	nidhi.joshi@bdbizviz.com	9620273997	
Prakash	Joshi	prakash.joshi@bdbizviz.com	9620273997	

### 10.5. Editing a Contact Group


- i) Click on  icon from the **‘Contacts’** page
- ii) A drop down menu will be displayed
- iii) Select **‘Edit Contact Group’** option from the drop down menu

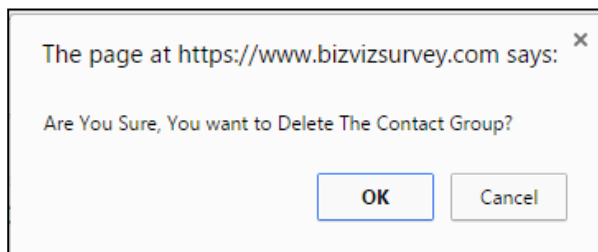
- iv) **'Edit Contact Group'** details will be displayed on the right panel
- v) Edit **'Group Name'** (if desired)
- vi) Click on **'Edit'** option



- vii) It will be edited and saved successfully


### 10.6. Deleting a Contact Group

- i) Go to **'Contacts'** page
- ii) Click on  icon given besides the **Contact Group Name**
- iii) A drop down menu will be displayed
- iv) Select **'Delete Contact Group'** option from the drop down menu



## 11. My Account

My Account option covers Account Summary and Billing Details for the user who has logged in.

- i) Go to platform home screen
- ii) Click on  icon from the home screen
- iii) A drop down menu will be displayed
- iv) Select **'My Account'** option from the drop down menu
- v) It will redirect the user to a new screen covering:
  - vi) Account Summary
  - vii) Billing Details
- viii) Selecting either of the option the details will be displayed in the full screen (as shown below)

### 1. Account Summary

Clicking on **'Account Summary'** will redirect the user to a new screen displaying:

**i) Account Details**

- i) It displays the current Survey platform plan taken up by the user
- ii) Click on **'Upgrade'** option to upgrade the user plan

ACCOUNT DETAILS	
Plan Type	Free <span style="float: right;"><a href="#">Upgrade</a></span>

- iii) Clicking on **'Upgrade'** will redirect the user to a new screen
- iv) User can select a plan out of the given choices
- v) Click on **'Upgrade'** option to access the Billing Details
- vi) Fill the required information in the given fields:
  - a. Enter Address
  - b. Enter Postal Code
  - c. Enter City
  - d. Enter Country
  - e. Enter Phone Number
  - f. Enter Organization Name
- vii) Select **'Auto Renew'** option (if desired)
- viii) Enter Card details:
  - a. Card Number
  - b. Expiration Date
  - c. CVV
- ix) Click on **'Pay'** option to complete the procedure for payment

<b>Summary</b>	
Plan Type:	Basic
Billing Frequency:	Month
Price:	₹600
<b>Billing Details</b>	
Enter Address	
Enter Postal Code	
Enter City	
Enter Country	
Enter Phone Number	
Enter Organization Name	
<input checked="" type="checkbox"/>	Auto Renew

<b>PayPal</b>
Card Number
Expiration Date
CVV
<b>Pay</b>

**ii) Login Details**

It covers below mentioned user details. Such as:

- a. First Name
- b. Last Name
- c. Password (User password is not displayed)
- d. Email

LOGIN DETAILS	
First Name :	Prakash
Last Name :	Joshi
Password :	<input type="button" value="Change"/>
Email :	prakash.joshi@bdbizviz.com <input type="button" value="Change"/>

**iii) Changing Password and Email Address**

- i) Go to My Account Summary screen
- ii) Click on **'Change'** option provided besides **Password** option
- iii) A new box will be displayed
- iv) Enter new password in the box and click on **'Update'** option
- v) Click on **'Change'** option provided besides **Email** option
- vi) A new box will be displayed
- vii) Enter new/ modified email id in the box and click on **'Update'** option

LOGIN DETAILS	
First Name :	Prakash
Last Name :	Joshi
Password :	<input type="password" value="*****"/> <input type="button" value="Update"/>
Email :	prakash.joshi@bdbizviz.com <input type="button" value="Update"/>

viii) Both password and email id will be updated successfully

**iv) Other Details**

It covers some more information regarding the user (as displayed below):

OTHER DETAILS	
Address :	
Postal Code :	
City :	
Country :	
Phone No. :	
Organization Name :	

## 2. Billing Details

It covers two aspects:

### i) Billing Profile

- a. **Account Type:** Current account type in use by the user
- b. **Auto-renew:** Indicates whether auto-renewal for the chosen account type is **Disabled** or **Enabled**

BILLING PROFILE	
Account Type :	Free
Auto-renew :	Disabled <input type="button" value="Enable"/>


### ii) Billing History

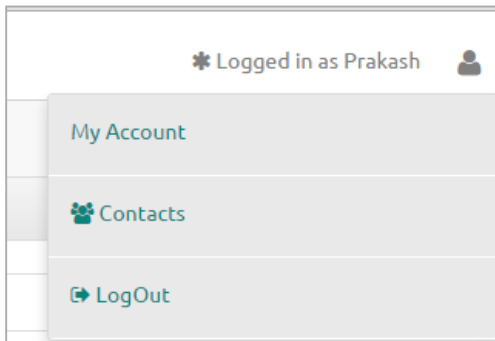
It covers a detailed summary of previous billing details. Such as:

- a. Invoice
- b. Billing Date
- c. Plan Type
- d. Status
- e. Amount

BILLING HISTORY				
Invoice	Billing Date	Plan Type	Status	Amount

## 12. Logging Out

- i) Go to platform home screen
- ii) Click on  option
- iii) A drop down menu will be displayed
- iv) Select '**Logout**' option from the drop down menu



- v) You will be successfully logged out from the Survey platform

**Note:** Logging out from the survey platform will redirect the user back to the website home screen