BizViz User Guide

Survey
(as Platform Plugin)

Release: 2.5

Date: Nov. 9, 2016

Table of Contents

1. About this Guide

1.1. Document History

Product Version	Date (Release date)	Description
BizViz Survey App 1.0	June 9th, 2015	First Release of the document
BizViz Survey App 2.0	February 18th, 2016	Updated document
BizViz Survey App 2.5	Nov 9th, 2016	Updated document

1.2. Overview

This guide covers how to:

- Access the BizViz Survey Plugin
- 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 plugin to interact with business intelligence data and collect responses to be analysed.

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. Survey responses can be used to prepare various interactive reports and dashboards. Hence, this integration of BizViz Survey with BizViz Analytics makes it a robust analytic tool extracting hidden insights out of the collected data.

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

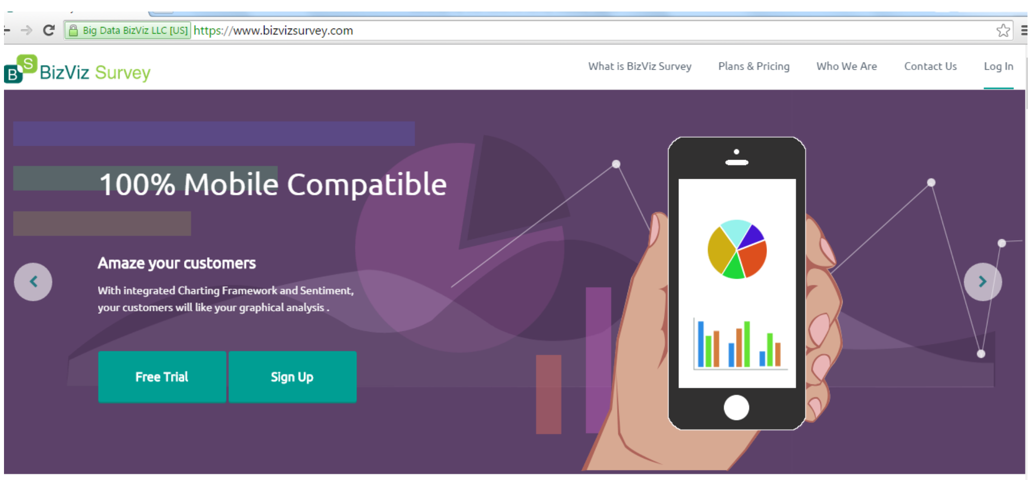
- Users should be permitted to access Survey application from the User Management module of the BizViz Platform.
- BizViz Survey platform can be supported through Web browser, Tablet, and Mobile Phone.

3. Getting Started with the BizViz Survey Platform

Follow below mentioned steps to access the BizViz Survey Platform:

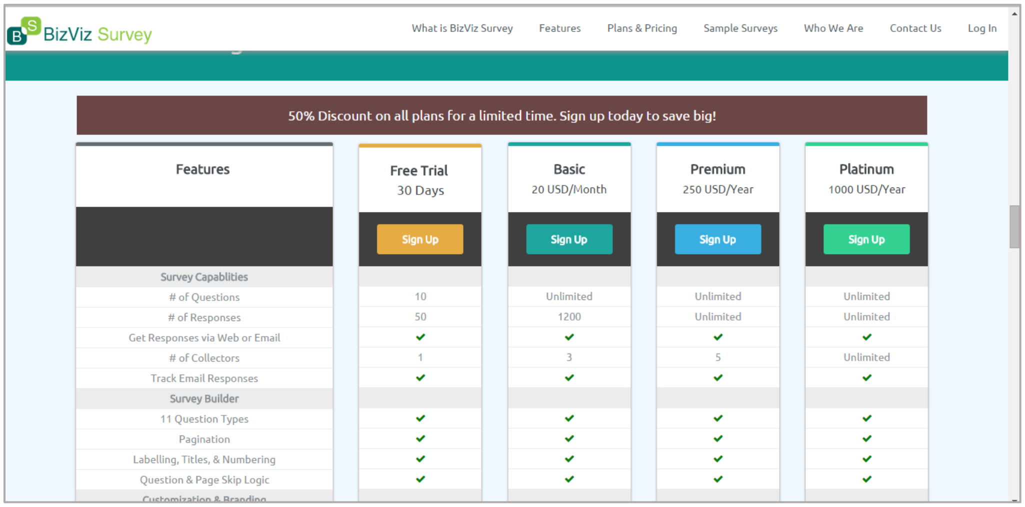
3.1. Signing Up

i) Open BizViz Survey Platform Link: https://www.bizvizsurvey.com/
ii) The below mentioned screen will appear:



iii) Click ‘**Sign Up**’.
iv) Users will be redirect on a new screen.
v) Choose a survey plan.

vi) Click ‘**Sign Up**’ for the selected survey plan.



vii) Users will be redirected to a new screen.

viii) Fill in the required fields:

- First Name
- Last Name
- Email
- Password
- Confirm Password

ix) Click ‘**Register**’.

x) The user will be registered successfully.

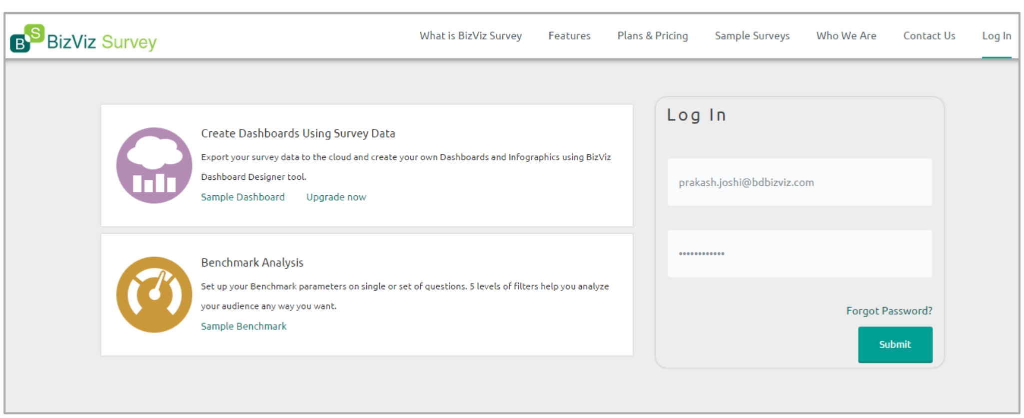
Note: After registering credentials for all the paid accounts, users will be directed to complete billing process. They can login only after the billing procedure gets completed.

3.2. Logging In

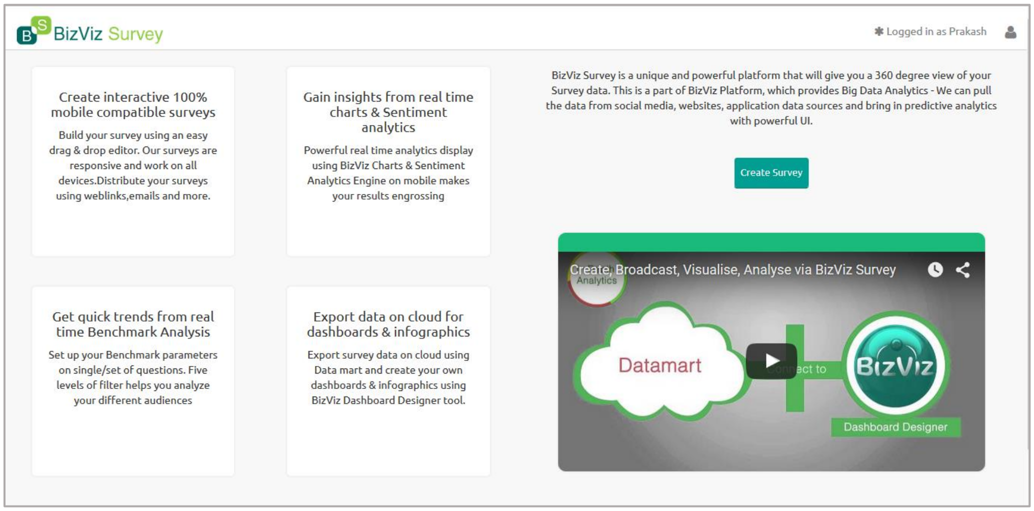
i) Click ‘**Log In**’ option from the top right corner.

ii) Enter your registered credentials.

iii) Click ‘**Submit**’.



iv) Users will be redirected to the BizViz Survey Platform home page.



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

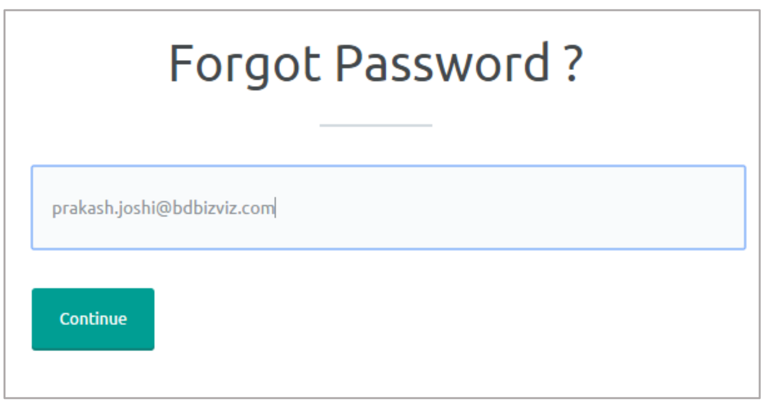
i) Navigate to the Login screen.

ii) Click '**Forgot Password?**'.

iii) A new screen will open.

iv) Enter contact email id.

v) Click '**Continue**'.

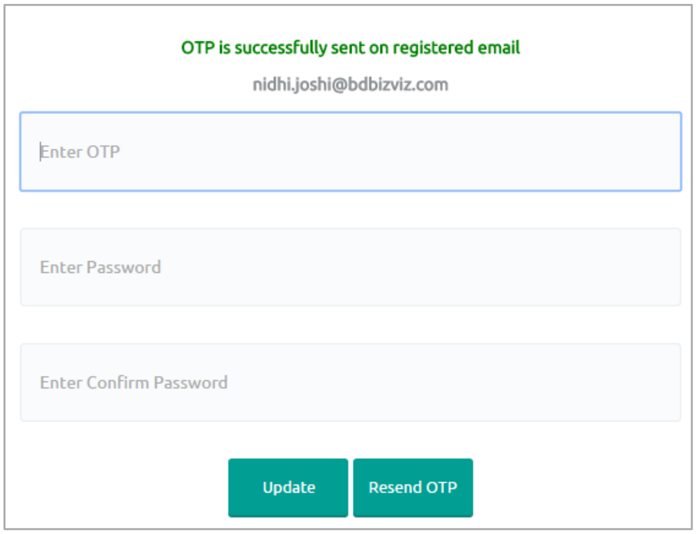


vi) A new page will open.

vii) Fill in the following information:

- **Enter OTP:** Use the OTP received on the registered email id
- **Enter Password:** Enter new password
- **Enter Confirm password:** Confirm the set password

viii) Click ‘**Update**’.



ix) User Password will be successfully updated.

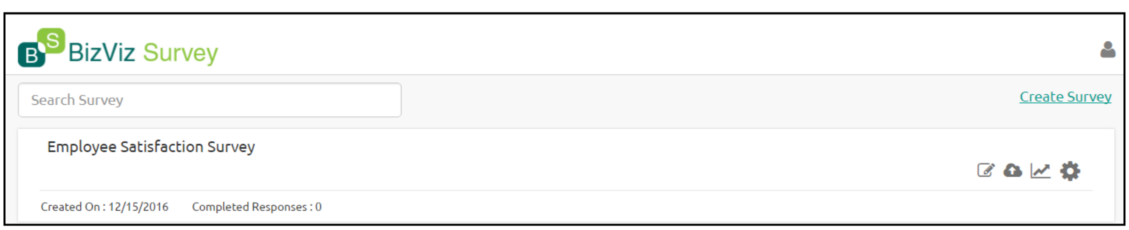
Note: Choose ‘**Resend OTP**’ option, in case of any discrepancy in receiving OTP for the first time.

4. Creating a Survey

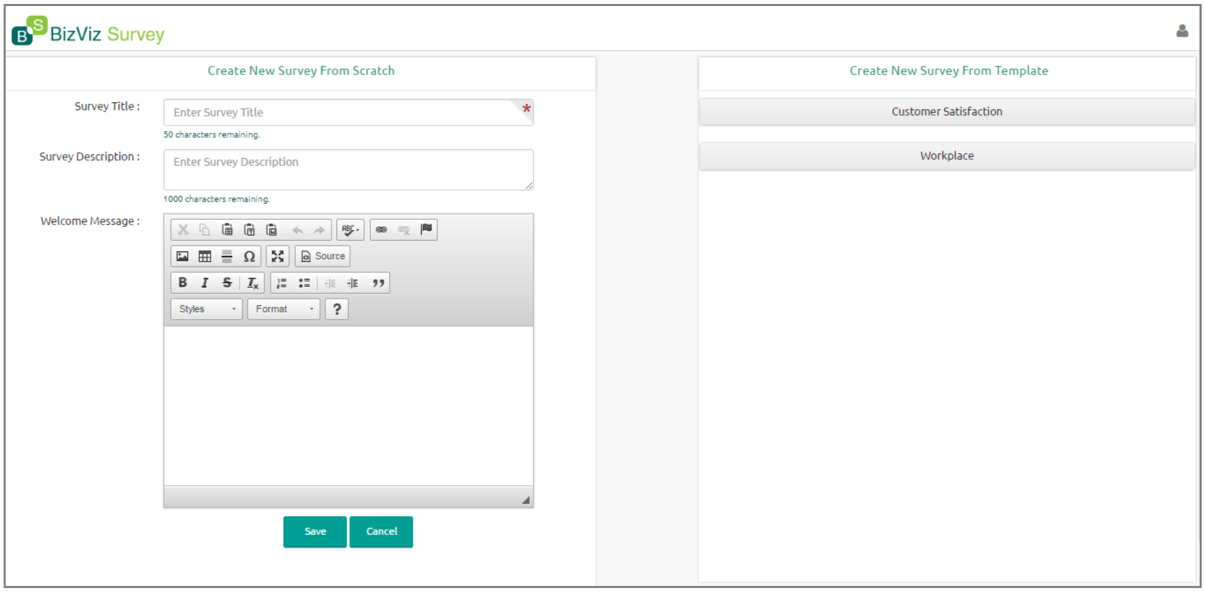
Building Survey is a simple and intuitive process with BizViz Survey. It enables any user to create effective and flawless surveys in no time.

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

i) Navigate to the Survey home page.
ii) Click ‘**Create Survey**’.



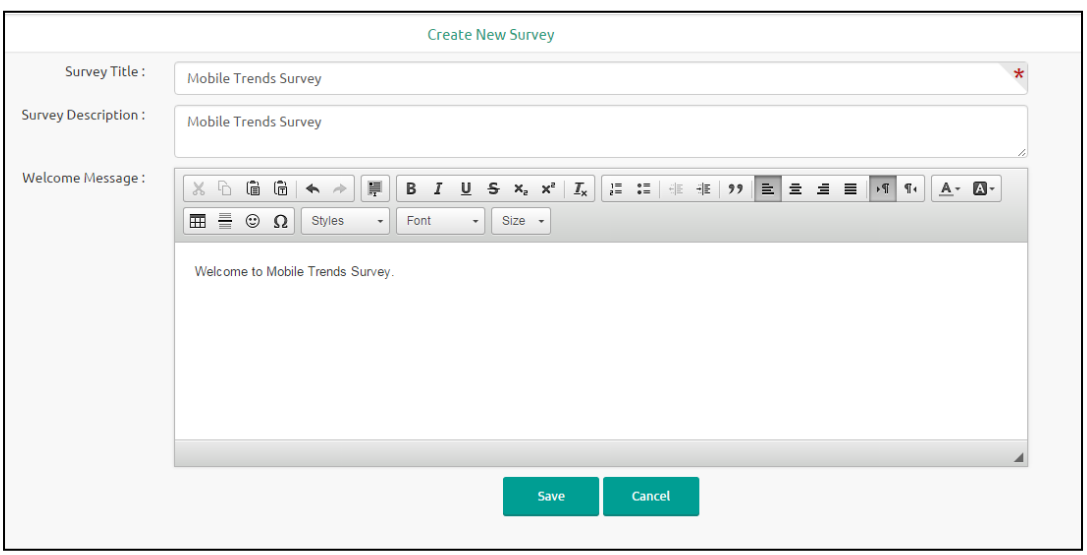
iii) A new page will open displaying the following options:
   a. Create New Survey from Scratch
   b. Create New Survey from Template



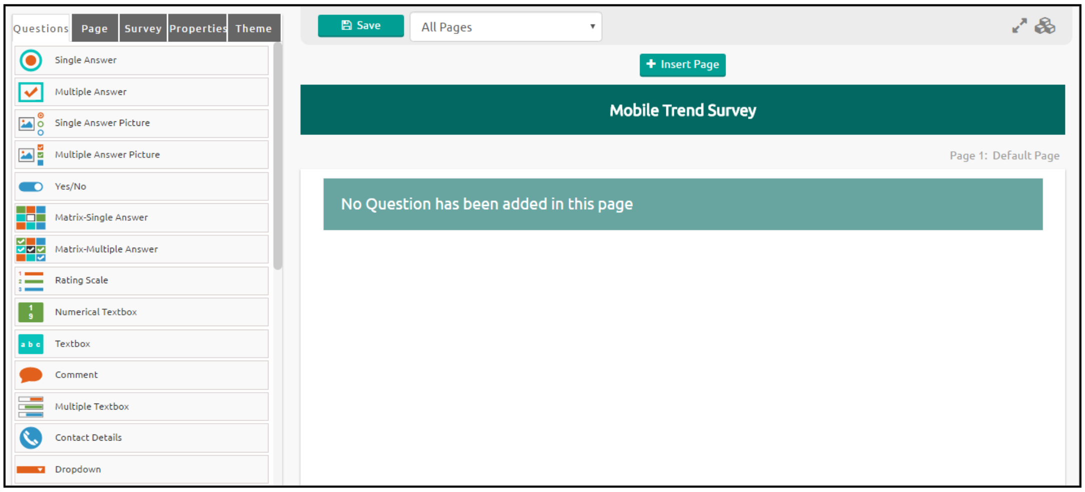
4.1. Creating a Survey using Scratch

i) Fill in the following information:
   a. Survey Title
   b. Survey Description
   c. Welcome Message

ii) Click ‘**Save**’.

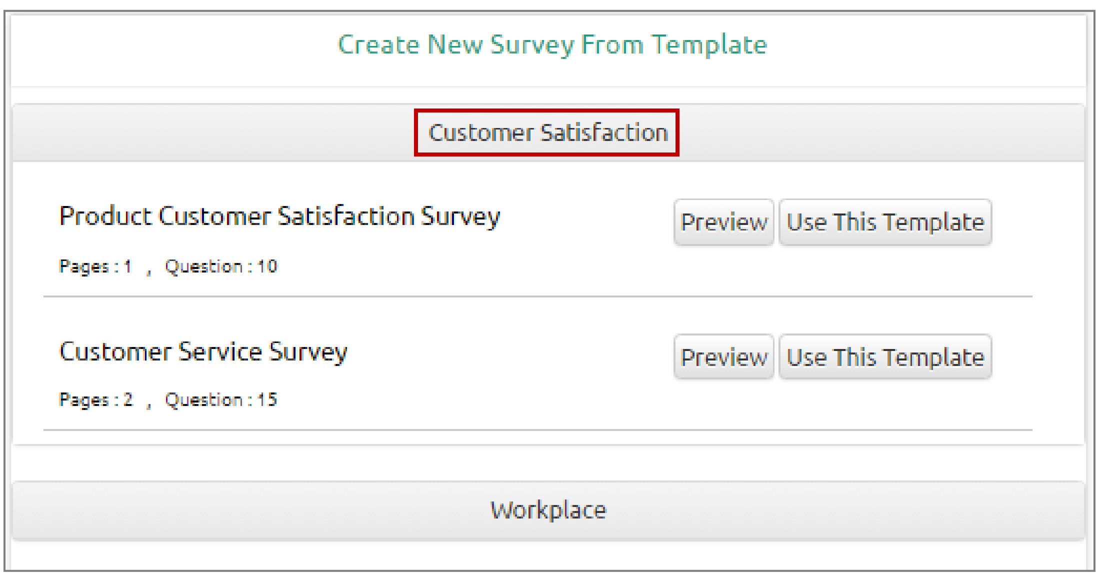


iii) A new page will open to design a survey questionnaire.
iv) The page will contain a menu row.



4.2. Creating a Survey using Template

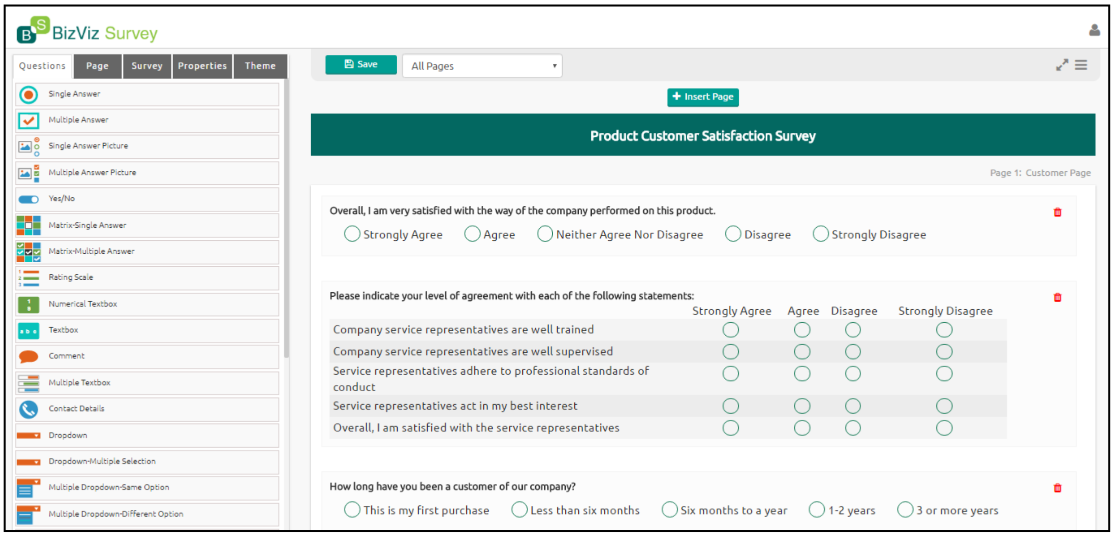
i) Click on a survey name.
ii) All the available survey templates will be listed with the following details:
  a. Preview
  b. Use This Template



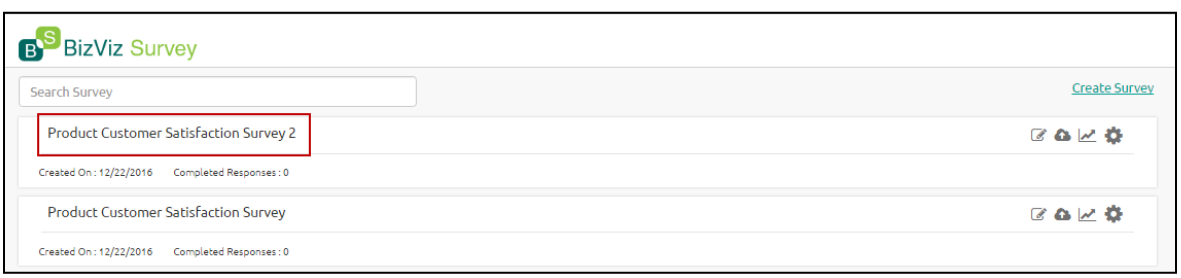
Note:

a. By clicking on ‘**Preview**’ option users will be redirected to the preview page of the survey.

b. By clicking on ‘**Use This Template**’ option users will be redirected to the following page:



c. Users can modify the selected survey information and questionnaire. The modified survey will be added in the Survey list.



d. A new Survey created via both the above-mentioned options will be added to the Survey List.

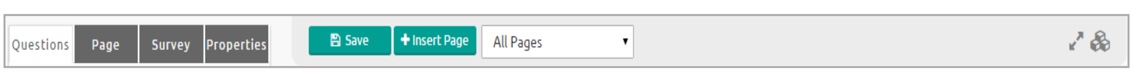
- **Other Related Options**

Icons	Name	Description
	Design Survey	Redirects users to design the survey questionnaire
	Publish Survey	Redirects users to publish the survey
	Analyze Result	Redirects users to see various analysis based on the collected survey responses
	More Options	Displays a list of options to be applied on a survey: 1. Preview Survey 2. Benchmark 3. Manage Datamart 4. Delete Survey 5. Copy Survey 6. Survey Summary

5. Designing a Survey

i) Navigate to the survey list.
ii) Click '**Design**' .
iii) Users will be redirected to the '**Question**' option on a menu row.
iv) The menu row will provide the following options to develop survey questionnaire:

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

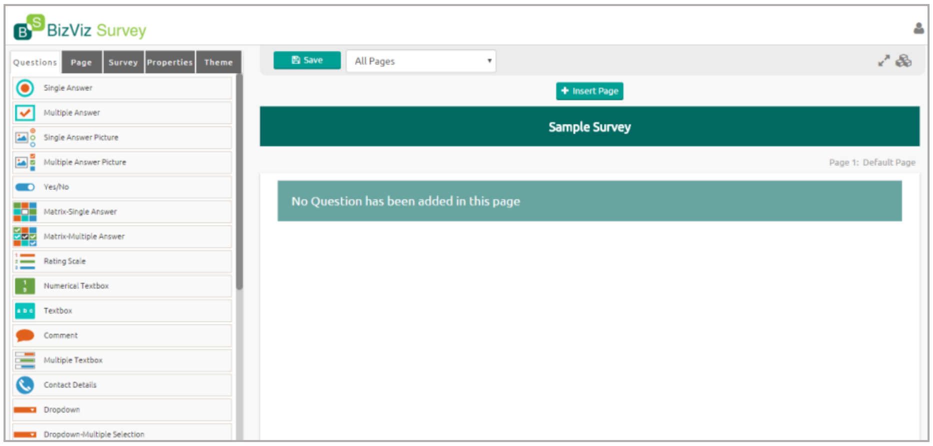


5.1. Questions

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

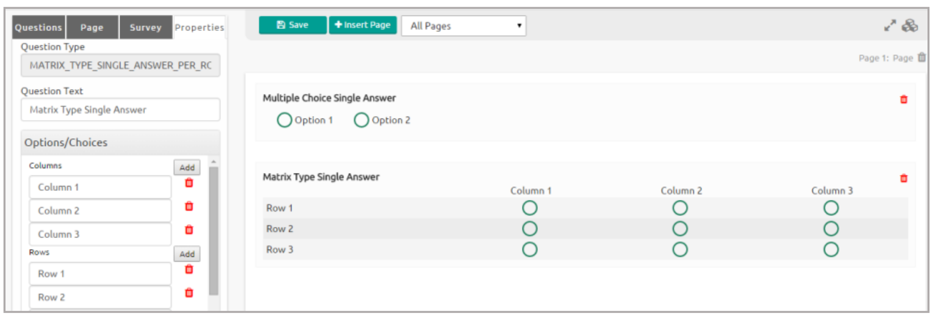
Inserting a Survey Question

i) Navigate to the menu row.
ii) '**Questions**' will be selected by default.
iii) Various question types will be displayed on the left pane of the screen.



iv) Use drag and drop feature **or** Click on a question type to add it on the right pane of the page.

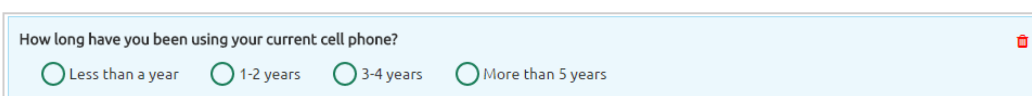
v) Rewrite in the given space to design to create a survey question.



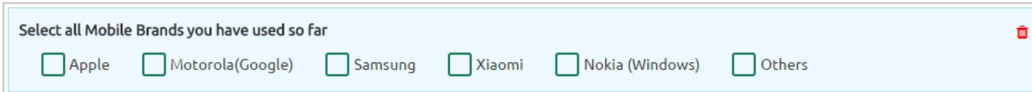
Available Question Types

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

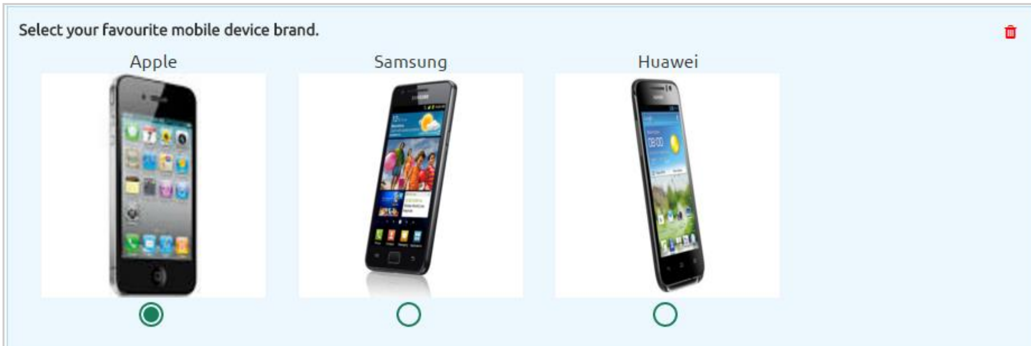
- **Single Answer:** This type of questions are essential questions to restrict respondents to a single option from all the provided options. Selecting an option out of all the provided options will often classify them as members of a group. Example, selecting age group, religion, or gender.



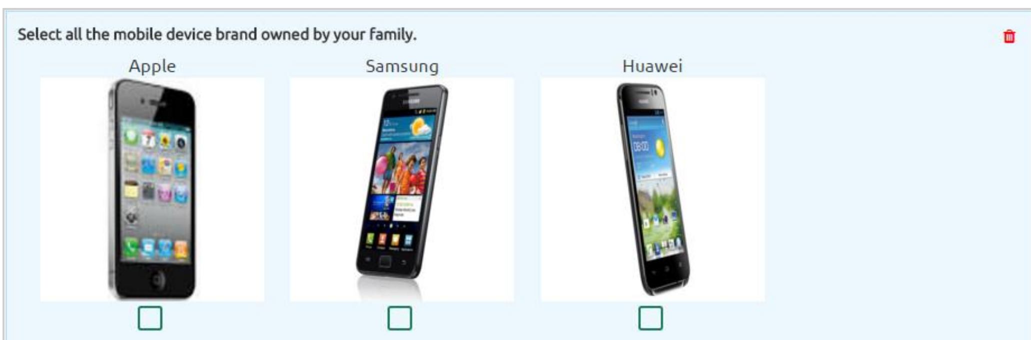
- **Multiple Answer:** Respondents can select one or more options from a list of answers to express their opinion. Multiple choice question type is used, when there are fixed number of options available for a question.



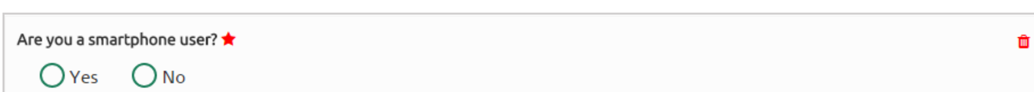
- **Single Answer Picture:** Use this type of question when you want respondents to select only one picture from a list of picture choices.



- **Multiple Answer Picture:** Use this type of question when you want respondents to select more than one picture from a list of picture choices.



- **Yes/ No:** Use '**Yes/ No**' when there are only two possible options for answering the question. This type of question can be also used as end survey questions. '**Required**' validation can be applied to this question.



- **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	○	○	○
Mother	○	○	○
Brother	○	○	○
Sister	○	○	○

- **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	☐	☐	☐	☐	☐	☐	☐
My 3 most used applications are (select 3)	☐	☐	☐	☐	☐	☐	☐
I need to upgrade my phone plan so I can do more	☐	☐	☐	☐	☐	☐	☐
I use my phone in the office for	☐	☐	☐	☐	☐	☐	☐

- **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 scale is used to assign weights to respondents' answers. Rating is predefined for these questions. E.g. Customer satisfaction survey questions.

How the following factors influence your mobile device purchase?

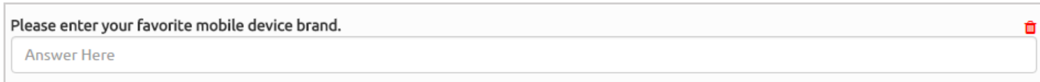
	not at all	somewhat	very much
Price	○	○	○
Screen Size	○	○	○
OS Features	○	○	○
Brand	○	○	○

- **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.

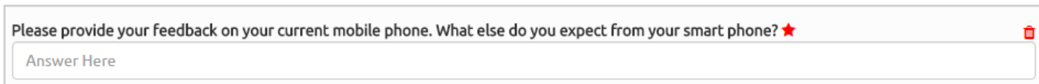
Howmany mobiles are owned by your family?

Answer Here

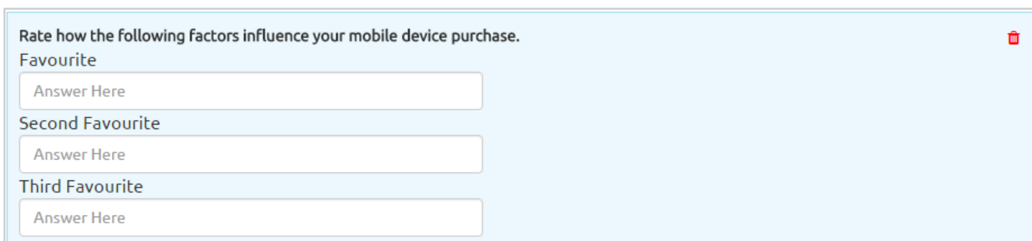
- **Text Box:** To collect single short text or numerical responses from the respondents single Text Box can be used. It can be validated to turn it into a compulsory question. **E.g.** Pin Code, Designation.



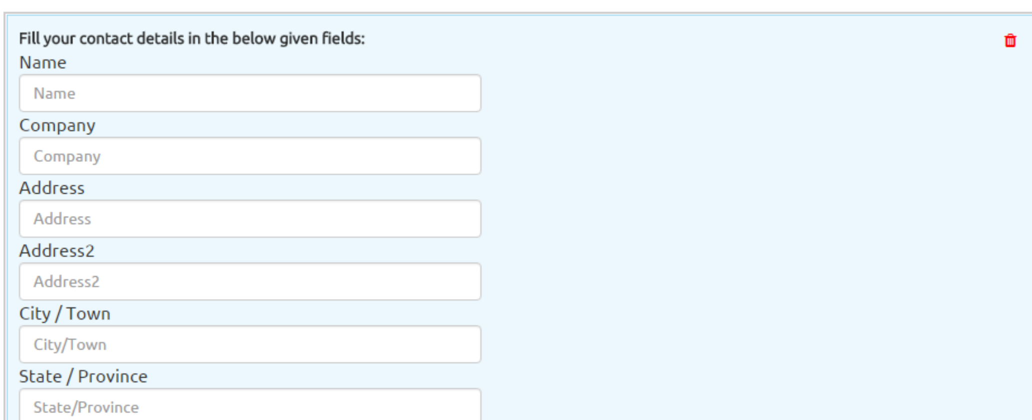
- **Comment:** It is difficult to provide specific pre-set answer options to open-ended survey questions; therefore, respondents are required to type their responses into a comment box. Respondents are free to choose the wordings and length of responses. Collected responses can then be viewed separately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

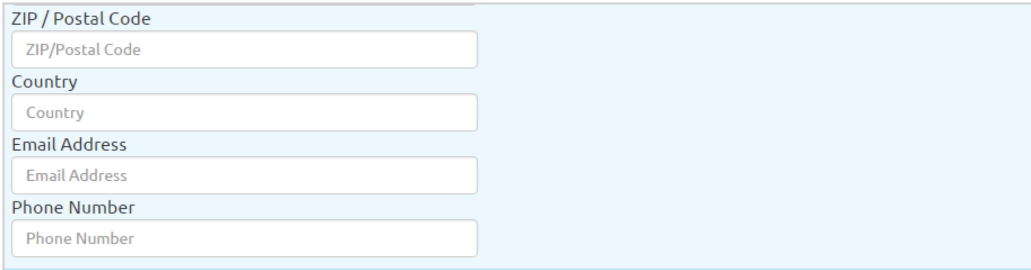


- **Multiple Textbox:** This question type is used to collect multiple short responses for a single question. It includes both, numerical and textual responses. User can specify the answer length and '**Required**' validation can be applied to this question type.

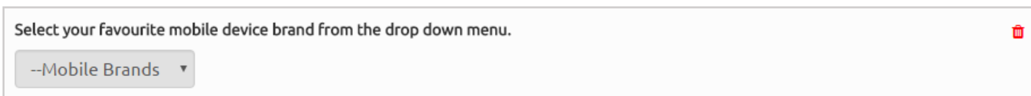


- **Contact Details:** Use this question type to collect basic contact details from the respondents. There are 10 predefined fields given under this question which can be enabled or disabled as per the need of survey.

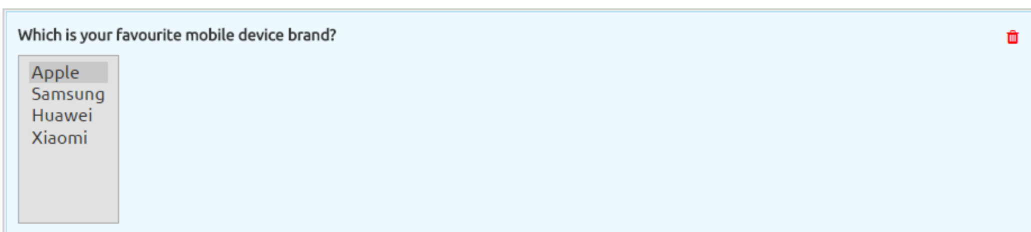




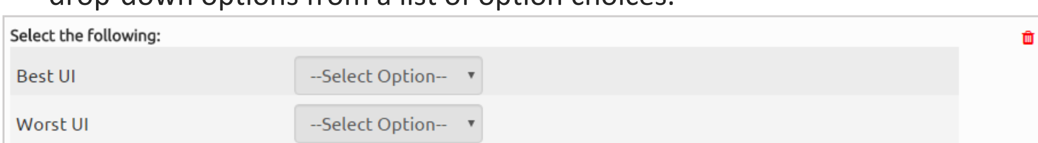
- **Dropdown:** Use '**Dropdown**' when you want respondents to select only one answer from a list of answer choices. Inserted details for the '**Question Text**' and '**Select Option**' title for the dropdown menu will be displayed on the workspace (as shown below).



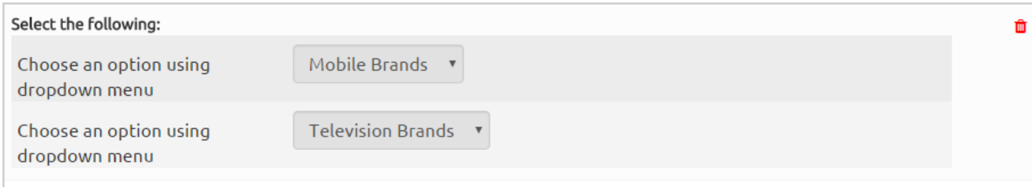
- **Dropdown Multiple Selection:** Use '**Dropdown Multiple Selection**' when you want respondents to select multiple answers from a list of answer choices.



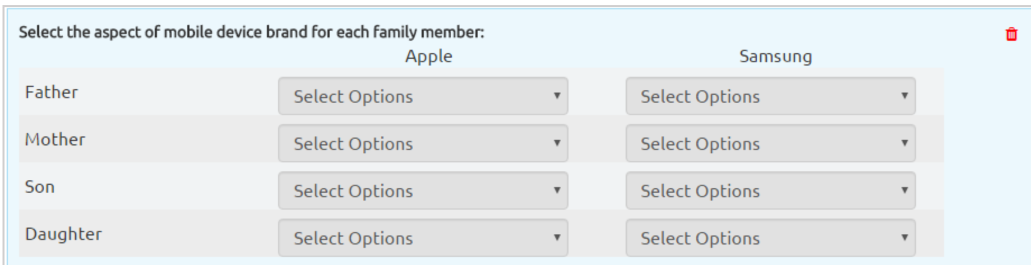
- **Multiple Dropdown-Same Option:** Use '**Multiple Dropdown-Same Option**' when you want respondents to answer multiple questions using the same drop-down options from a list of option choices.



- **Multiple Dropdown-Different Option:** Use '**Multiple Dropdown-Same Option**' when you want respondents to answer multiple questions using the different dropdown options from a list of option choices.



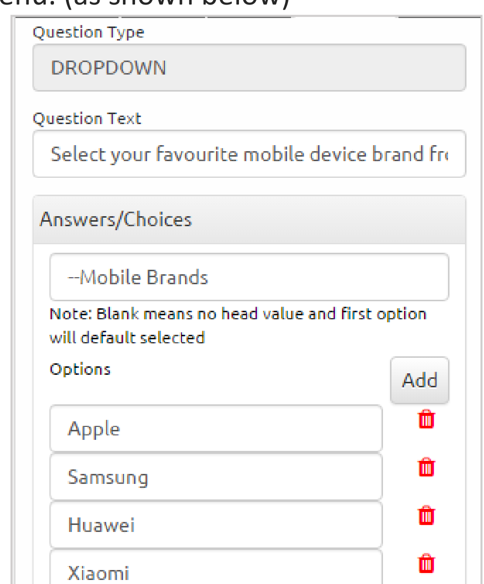
- **Matrix Dropdown-Same Option:** Use this question type when you want respondents to select option from matrix drop-down and collect multiple answers for the chosen column. Category of the columns and options provided for drop-down remains the same.



- **Matrix Dropdown-Different Option:** Use this question type when you want respondents to select option from matrix drop-down and collect multiple answers for the chosen columns. Category of the columns and options provided for drop-down can be different.

Note:

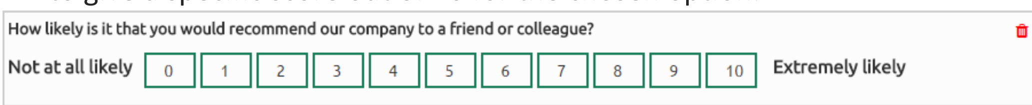
a. Users can use left side panel of the screen to insert options for the drop-down menu. (as shown below)



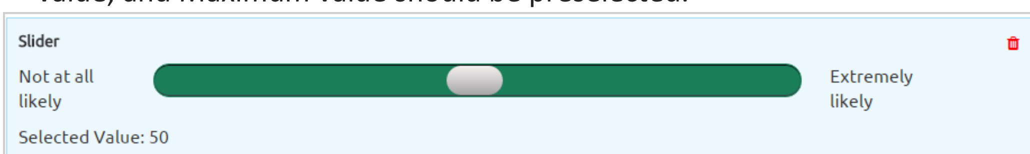
b. User can not avail the drop-down options from the workspace. '**Dropdown options**' will be enabled only on Preview page or while attempting the survey.
c. If '**Select Option**' is kept blank, then it will take first option by default from the drop-down menu.

- **Ranking:** Use '**Ranking**' type of question when you want to rank different options. The chosen options will be ranked out of the total number of available choices.

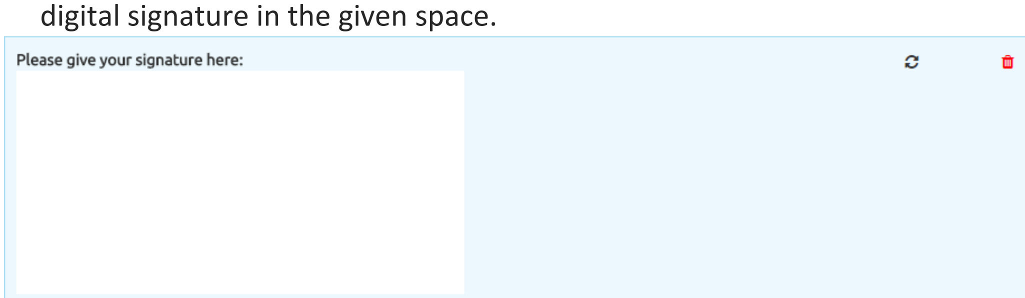
- **Net Promoter Score:** Use '**Net Promoter Score**' when you want respondents to give a specific score out of 10 for the chosen option.



- **Slider:** Use '**Slider**' when you want respondents to give specific score between selected Minimum and Maximum value. Value given to each step, Minimum value, and Maximum value should be preselected.

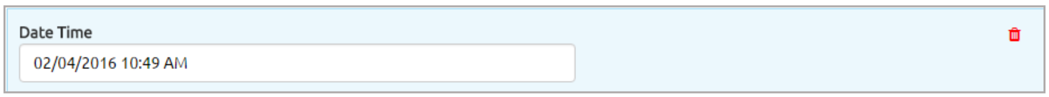


- **Digital Signature:** Use this option when you want respondents to give their digital signature. Respondents can provide digital signature through curser by holding the left click. Respondent can use left click of the cursor to provide digital signature in the given space.



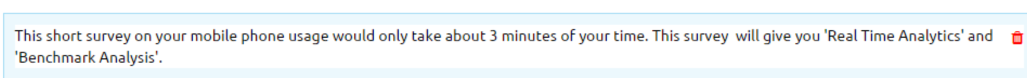
- **File Upload:** Use this option when you want respondents to upload a file. It supports PDF, document, Spread Sheet, and Image to be uploaded. File size should not exceed 500 KB. User can upload the file from preview page or attempt page.

- **Date/ Time:** Use this option when you want respondents to provide date and time. User can access this feature from survey designer page, preview screen and attempt page. By clicking on the space given for date and time, user will get a calendar to give a date. Time will be taken based on the system clock. User can change the inserted date and time manually.



- **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 to get meaningful outcome.

- **Descriptive:** Use this question type when you want to show brief description about different sections at any place in the survey. It supports smiles and html in the body.



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

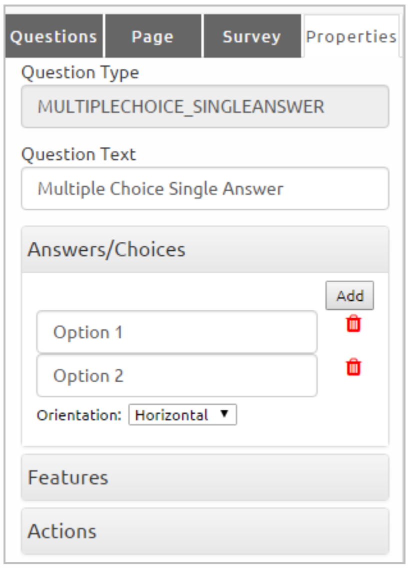
5.2. Properties

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

There are two ways to access '**Properties**' option:

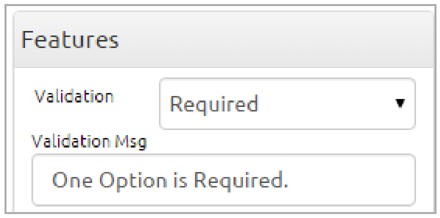
1. Select a Question Type from the '**Questions**' menu
2. Click on the inserted Survey Question

'**Properties**' will display question specific properties. Such as:

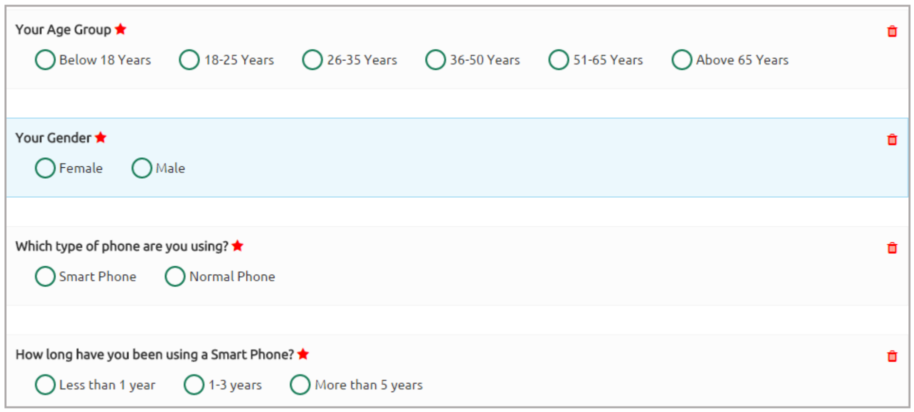


1. **Question Type:** Question type is pre-selected
2. **Question Text**: Question Text can be inserted or modified
3. **Options**: Options can be added, modified, and deleted
4. **Orientation**: **Horizontal** or **Vertical** orientation can be selected from the drop-down menu
5. **Features:** Features 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 must attend all the validated questions 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 '**Features**' provided on the left side of the Properties page
     ii) It will display '**Validation**' option
     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 ‘**Validation**’ symbol



- **Show Comment Box**

  Comment Box is an optional feature provided under properties.

  i) Click ‘**Features**’ provided on the left side of the ‘**Properties**’ page.

  ii) Select ‘**Show Comment Box**’ option by check marking the box.

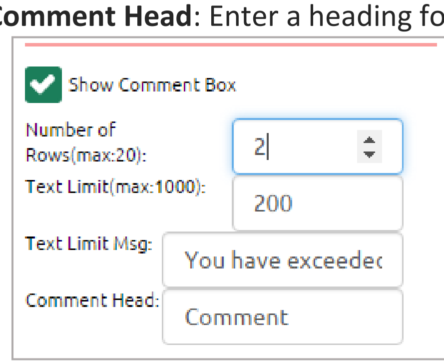
  iii) Fill in the following information:

    a. **Number of Rows**: Set rows by using the ‘**Stepper**’ button

    b. **Text Limit**: Set text limit using the ‘**Stepper**’ 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

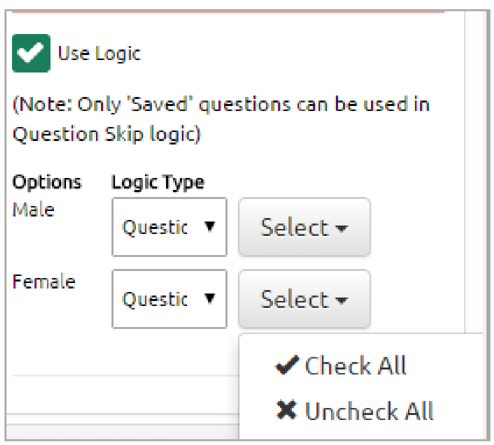


iv) A Comment Box will be added below the selected question.

- **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 ‘**Features**’ provided on the left side of the ‘**Properties**’ screen.
  ii) Select ‘**Use Logic** option by check marking the box.
  iii) ‘**Options**’ and ‘**Logic Type**’ will be displayed.
  iv) Select a logic from the drop-down menu.
  v) Selecting a logic will display ‘**Select**’ drop-down menu.
  vi) Select ‘**Check All**’ option from the ‘**Select**’ drop-down menu.
  vii) The selected logic will be applied to the desired option.



BizViz Survey uses below mentioned logic types:

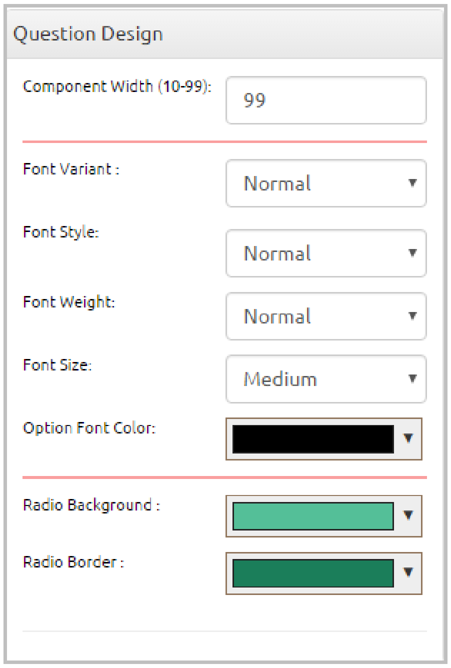
1. **Page Jump**: It is applied to a page. It enables all the respondents to access the immediate next page in the survey. Irrespective of the answers chosen by the respondents, they will be taken to the next page of the survey.
2. **Question Skip:** It enables the respondents to proceed on the next 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.

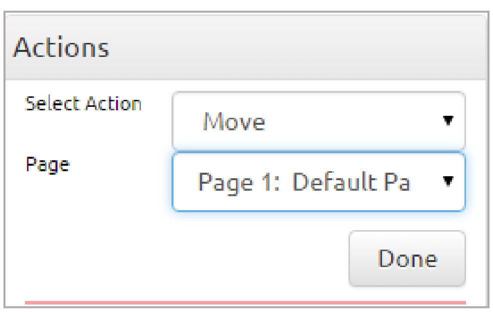
4. **End of Survey:** This logic is generally used after the last question given for the survey to generate Survey completion message for the recipients. It can be applied to a specific question, from where the organizer wants certain respondents to end the survey process.

Note: '**Use Logic**' option can be applied to some selected question types. The list includes Single Answer, Multiple Answer, Single Answer Picture, Multiple Answer Picture, and Yes/No question types.

6. **Question Design:** Use the below listed properties to set question display:
   i) **Component Width**: Set the required width number using the '**Stepper**' button 
   ii) **Font Variant**: Select an option from the drop-down menu
      a. Normal
      b. Small-Caps
   iii) **Font Style:** Select an option from the drop-down menu
      a. Normal
      b. Italic
   iv) **Font Weight:** Select an option from the drop-down menu
      a. Normal
      b. Bold
   v) **Font Size:** Select an option from the drop-down menu.
   vi) **Option Font Color:** Set font color using the available color menu.
   vii) **Radio Background:** Set background color for radio buttons using the available color menu.
   viii) **Radio Border:** Set border color for radio buttons using the available color menu.



7. **Actions:** Users can move a question to any of the survey page by applying this option
   i) Click '**Actions**' provided on 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.

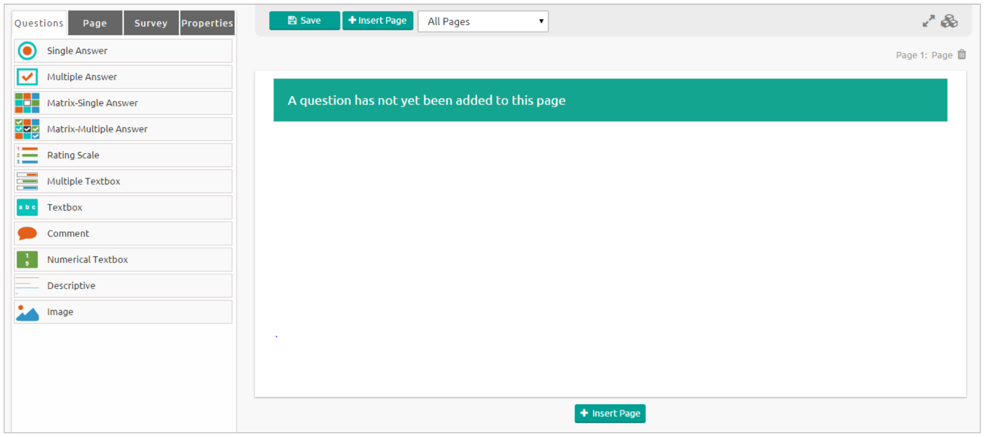


5.3. Inserting a New Page

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 the '**+ Insert Page**' option from the Menu Row.
   ii) A new page will be inserted **before** the existing page.
2. **Insert Page Option at the bottom of the screen**
   i) Click on the '**+ 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 the '**Page Delete**' option  provided at the top right side of each page.

5.4. Page: Editing an Existing Page

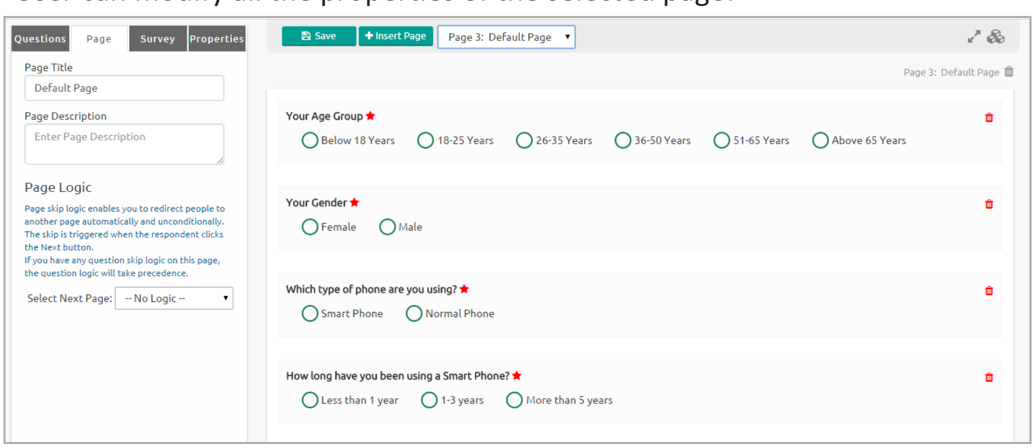
ii) Select any one page from the '**All Pages**' drop-down menu.

iii) Click on the '**Page**' option from the Menu Row.

iv) Properties of the page will open on the left side of the screen.

- Page Title
- Page Description
- Page Logic

v) User can modify all the properties of the selected page.

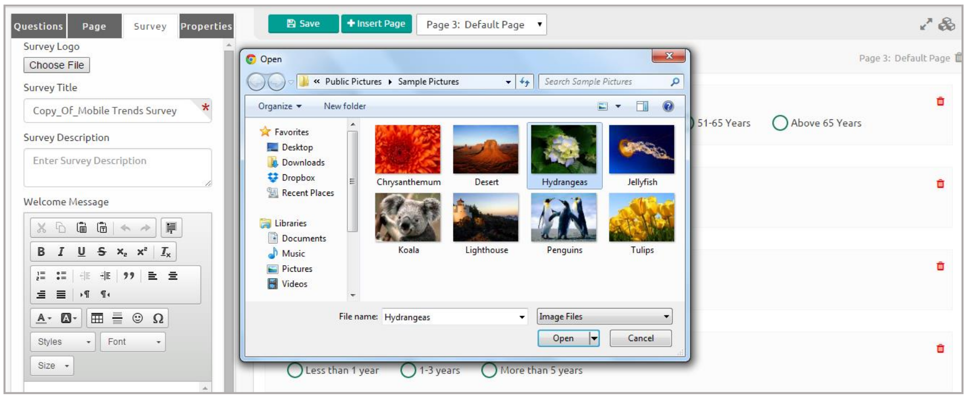


5.5. Survey Option

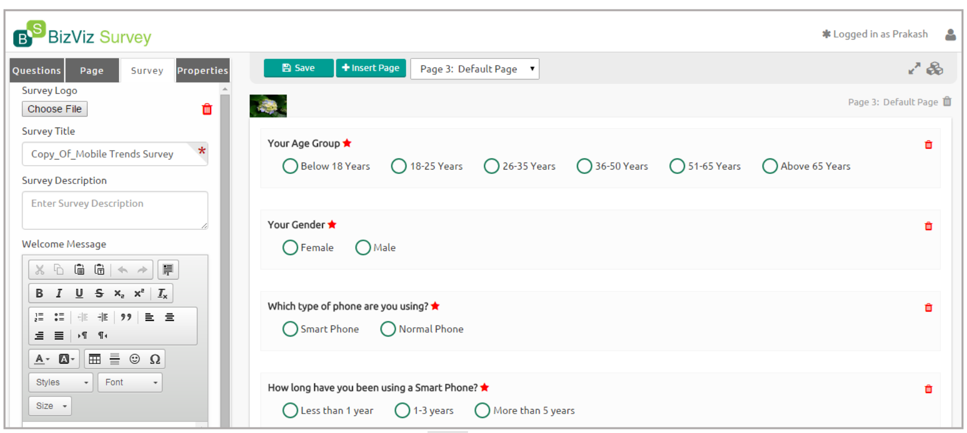
Survey option enables the user to insert a Survey Logo and edit/modify the '**Create Survey**' screen.

1. Adding a Survey Logo

i) Click on the '**Survey**' option from the Menu Row.
ii) It will launch '**Choose File**' option.
iii) Click on the '**Choose File**' option.
iv) Select an image or logo you desire to upload from the current system.
v) Click on '**Open**' to upload the image/ logo.



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



vii) Click on the '**Delete**' option provided next to the '**Choose File**' option to remove the Survey Logo.

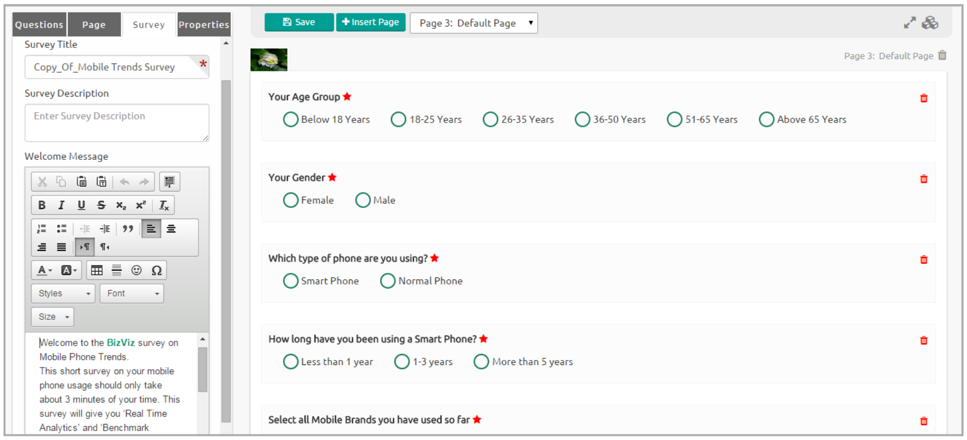
Note: Survey logo can be replaced, if desired.

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

i) Click on the '**Survey**' option on the Menu Row.
ii) Details of the '**Create Survey**' page will be displayed on the left side of the screen. It covers:

- Survey Title,
- Survey Description,
- Welcome Message

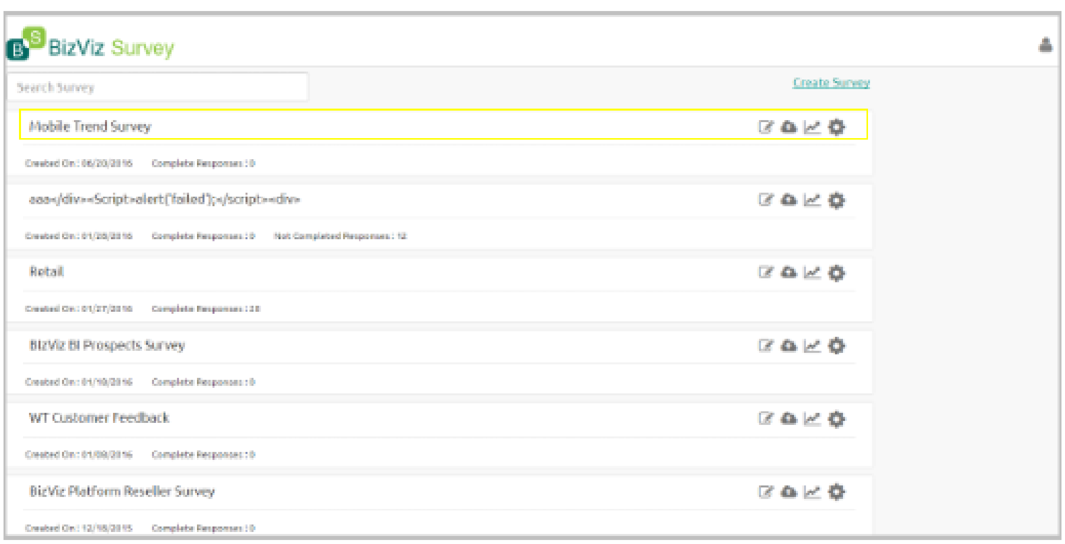
iii) These details can be edited/ modified (if desired)



5.6. Saving a Survey

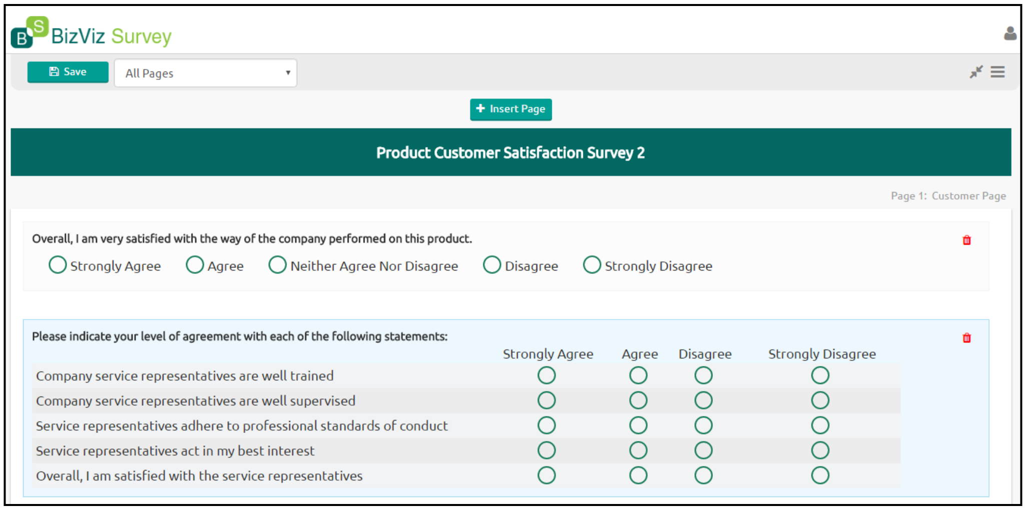
i) Click on the '**Save**' option from the Menu Row to save the changes or modifications.
ii) All the changes will be saved in the survey.
iii) After all the modifications are successfully saved, the '**Questions**' option will open by default.

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

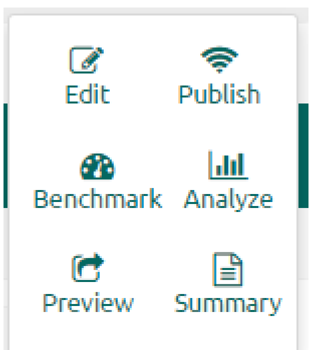


- **Other Related Options:**

- ‘**Full Screen**’ icon displays the survey questions in full screen (as shown in the following image):



- By Clicking on the ‘**More Options**’ icon will display a list of options to be applied on the survey. Such as:



- Edit Questions
- Publish Survey
- Benchmark
- Analyze Survey
- Preview Survey
- Summary

6. Publishing a Survey

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

6.1. Providing 'Publish Survey' Information

i) Navigate to the survey list.

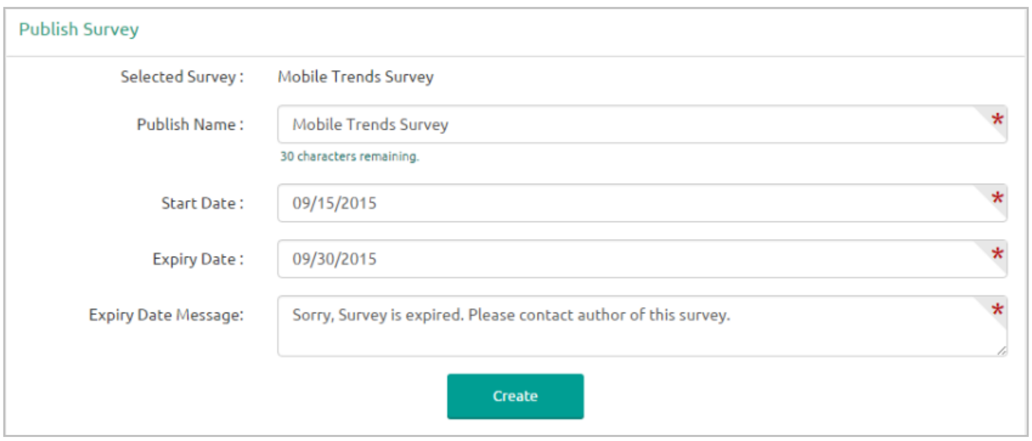
ii) Click '**Publish**'

iii) Users will be redirected to the '**Publish Survey**' page.

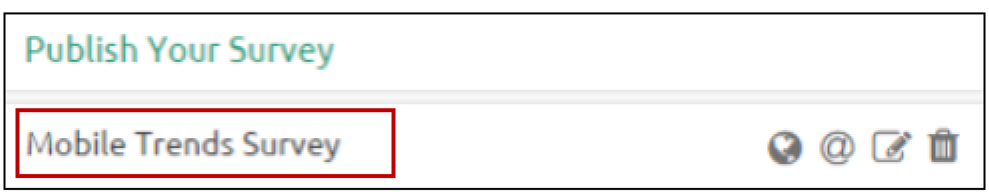
iv) Fill in the following information:

- Publish Name
- Start Date
- Expiry Date
- Expiry Date Message.

v) Click '**Create**'.



vi) The information will be saved and the provided publish name will be added to the '**Publish Your Survey**' list.



- **Other Related Options:**

Options	Task Assigned
	Add Web Link Collector

	Add Email Collector
	Edit Publish
	Delete Publish

6.2. Collector(s): Accessing Collector Options

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 form 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.

BizViz Survey provides two ways to access collector option:

i) Click '**Create**' provided at the end of the publish survey information.
ii) The following options will be displayed to create collector:

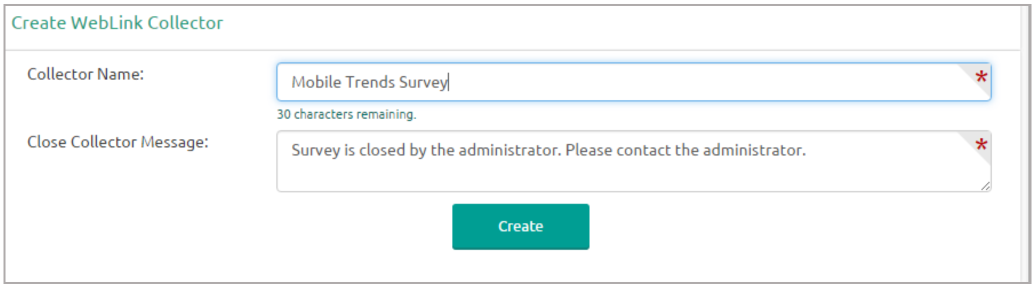
iii) User can select any one option by a click on it.

OR

i) Navigate to the '**Publish Your Survey**' list.
ii) Four options will be provided next to the publish name of a survey.
iii) The First two options (and) can be used to create a new collector.

6.3. Creating a Web Link Collector

i) Click '**WebLink Collector**' or '**Add Web Link Collector**' option
ii) '**Create Weblink Collector**' page will be displayed.
iii) Enter a name for the collector (Maximum limit given is of 50 characters)
iv) Click '**Create**'.



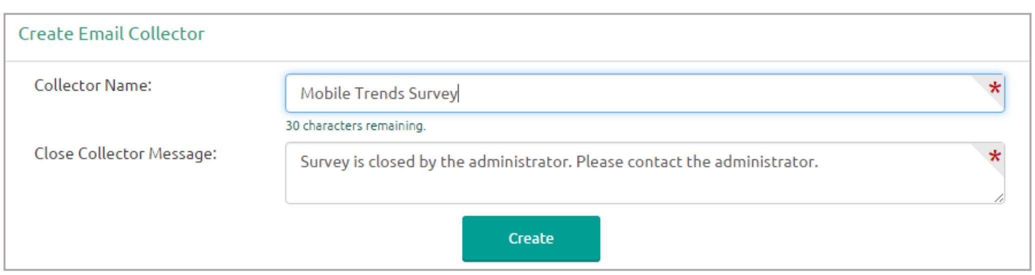
v) The Web Link Collector will be successfully created and added to the '**Publish Your Survey**' list.

- **Related Options:**

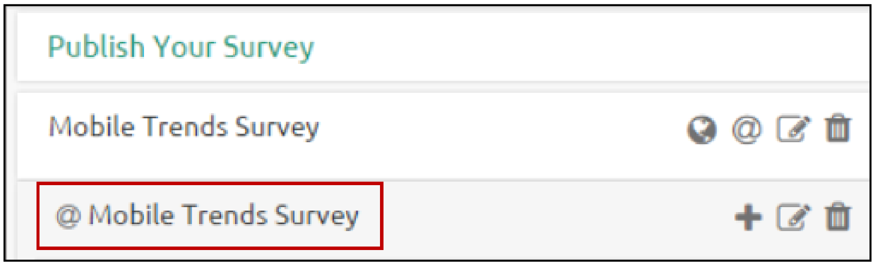
Icon	Allotted Function
or	Switch On/Off button to enable or disable the WebLink
	View URL (link)
	Edit WebLink Collector settings for the end users
	Delete the created collector

6.4. Creating an Email Collector

i) Click '**Email Collector**' or '**Add Email Collector**' option
ii) '**Create Email Collector**' page will be displayed.
iii) Enter a name for the collector (Maximum limit given is of 50 characters).
iv) Click '**Create**'.



v) The Email Collector will be successfully created and added to the '**Publish Your Survey**' list.



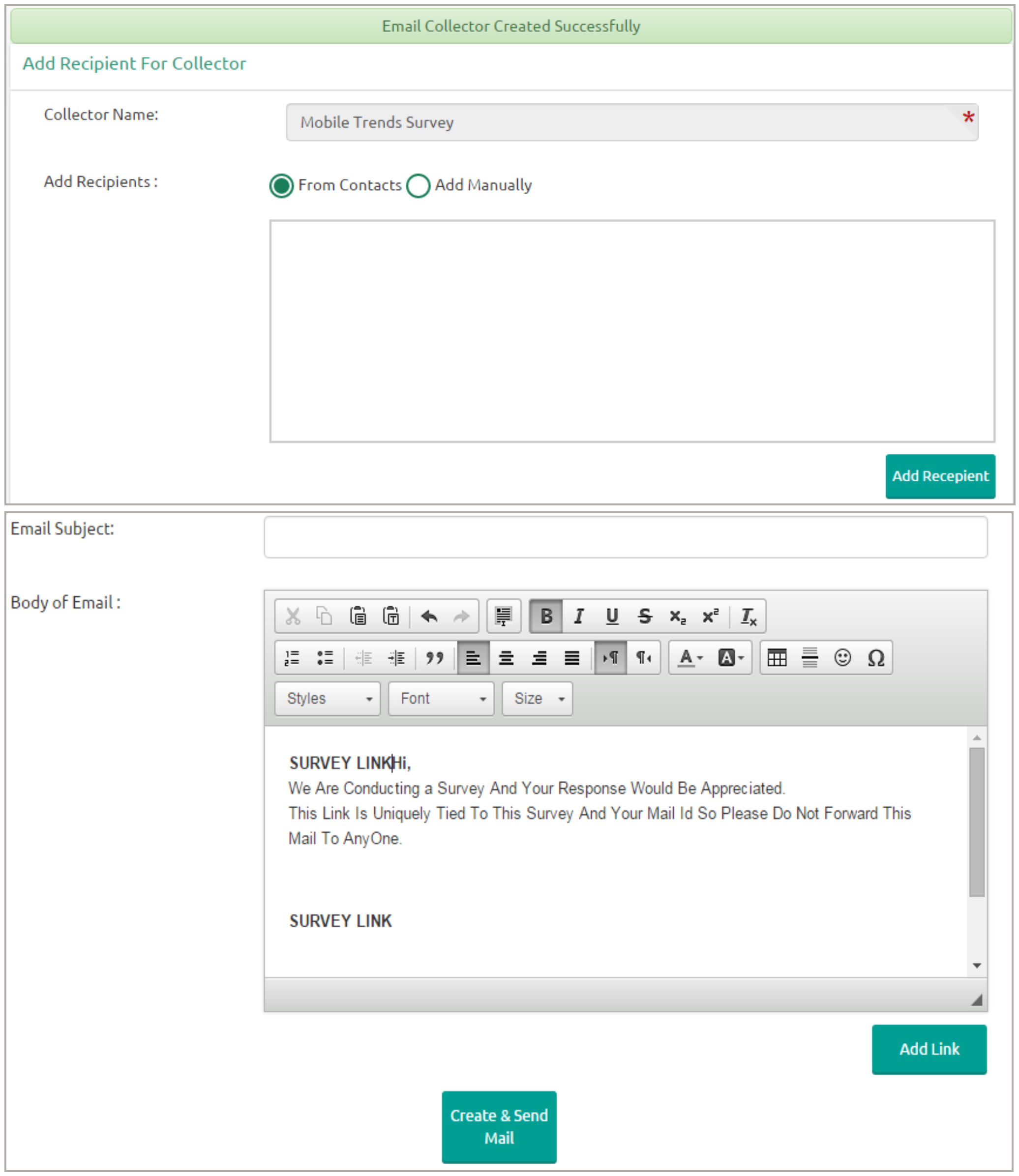
- **Related Options:**

Icon	Allotted Function
	Add Recipients to email collector
	Edit collector settings for the end users
	Delete the created collector

6.4.1. Adding Recipients for Email Collector

i) Click '**Create**' option provided on the '**Create Email Collector**' page.
ii) '**Add Recipient for Collector**' page will be displayed with the pre-defined collector name.
iii) Fill in the following information:
- **Add Recipients**: Add names of the recipients either from the '**Contact Groups**' or insert manually.
- **Email Subject:** Enter a Subject.
- **Body of Email**: It displays a prewritten message. This message can be modified.

iv) Click on the '**Add Link**' option to add the collector link.
v) Click on the '**Create & Send Mail**' option.



vi) A mail will be sent to the added recipient(s).

Note: Collector name displayed on the 'Add Recipients for Collector' page cannot be changed.

1. **Adding Recipients from Contacts**
   i) Navigate to the '**Add Recipients for Collector**' page.
   ii) Select '**From Contacts**' option.
   iii) Click the '**Add recipients**' option provided below the box.
   iv) A new window entitled '**Contact Group Present**' will be displayed.

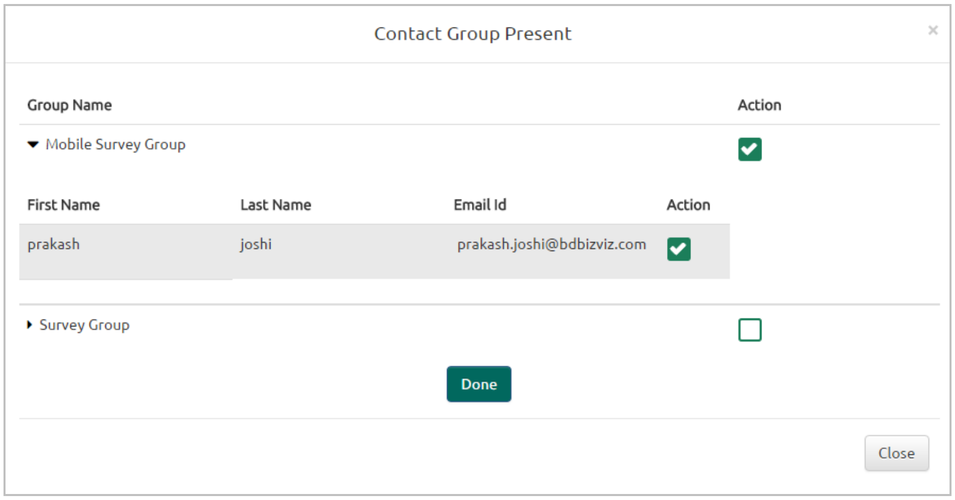
v) Click the button provided on the left side of a Contact Group Name.

vi) Contact details will be displayed below the contact group name.

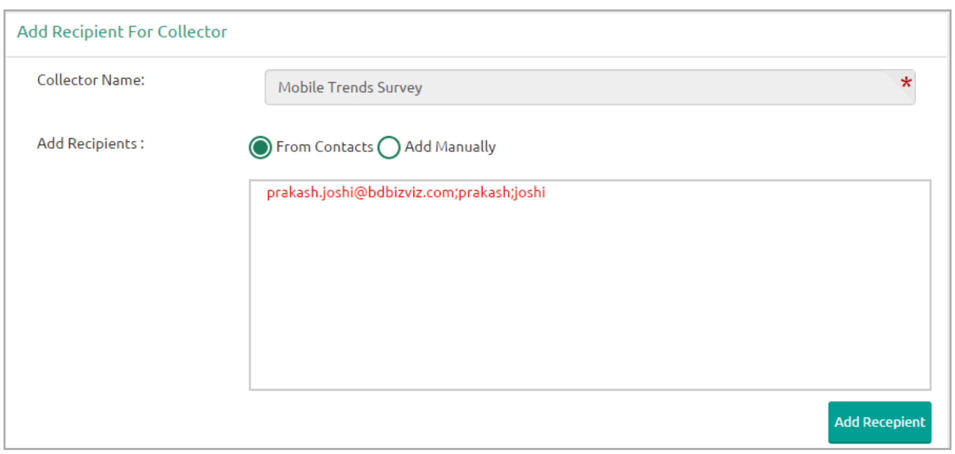
vii) Select ‘**Action**’ option provided next to the contact details (by check marking the box).

viii) Select ‘**Action**’ option provided next to the Contact Group Name (by check marking the box).

ix) Click ‘**Done**’.



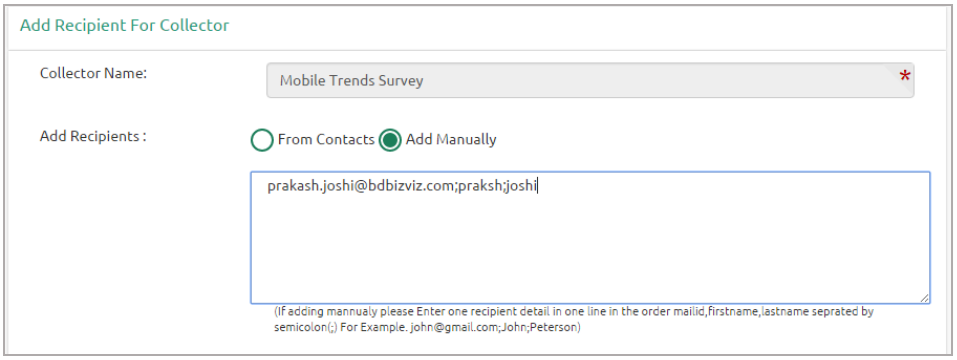
x) Recipients will be successfully added from the selected contact group as displayed below:



2. Adding Recipients Manually

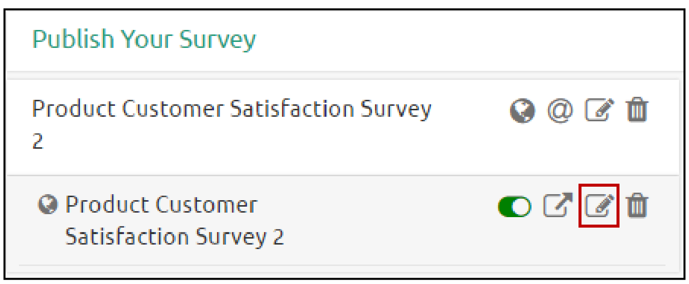
i) Navigate to the **‘Add Recipients for Collector’** page.

ii) Select **'Add Manually'** option.
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



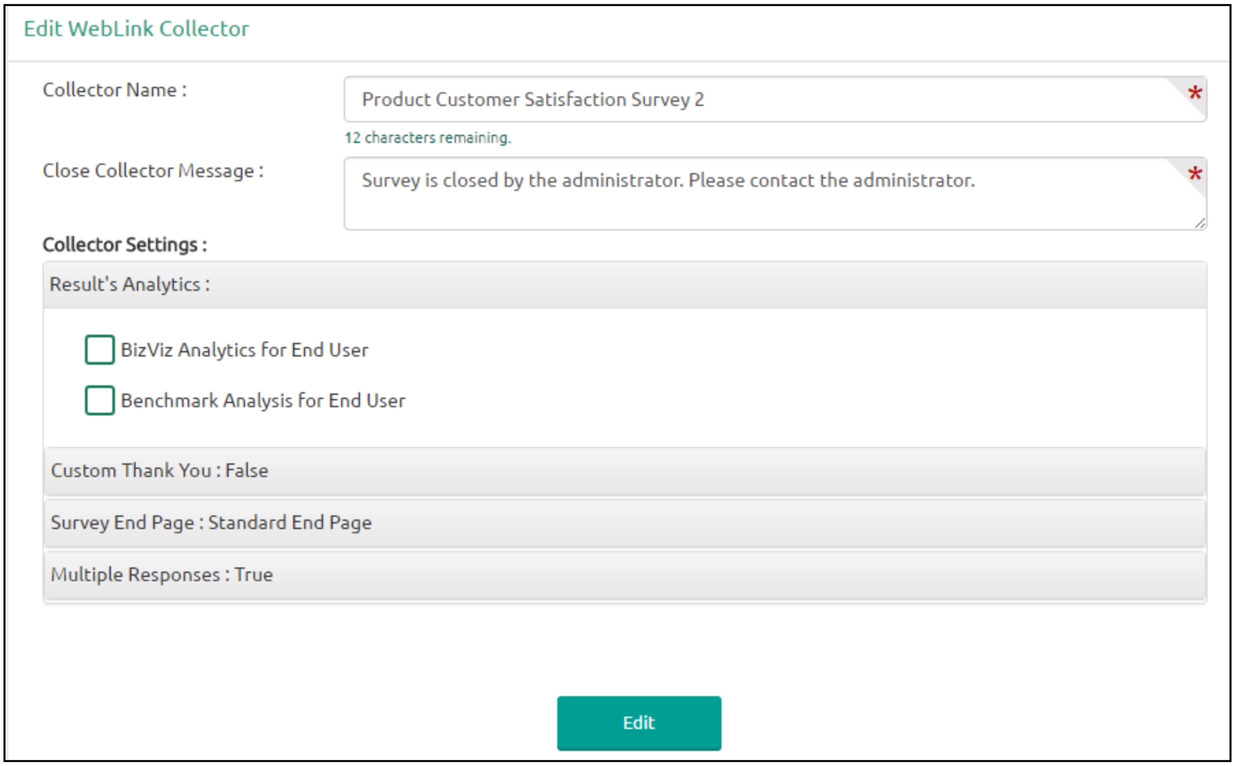
6.5. Editing Collector(s)

i) Navigate to the '**Publish Your Survey**' list.
ii) Click '**Edit**' provided next to a Collector name.



iii) '**Edit Collector**' option will be displayed on the right pane of the screen.
iv) The following information can be edited for a collector:
- Collector Name
- Close Collector Message
- Collector Settings

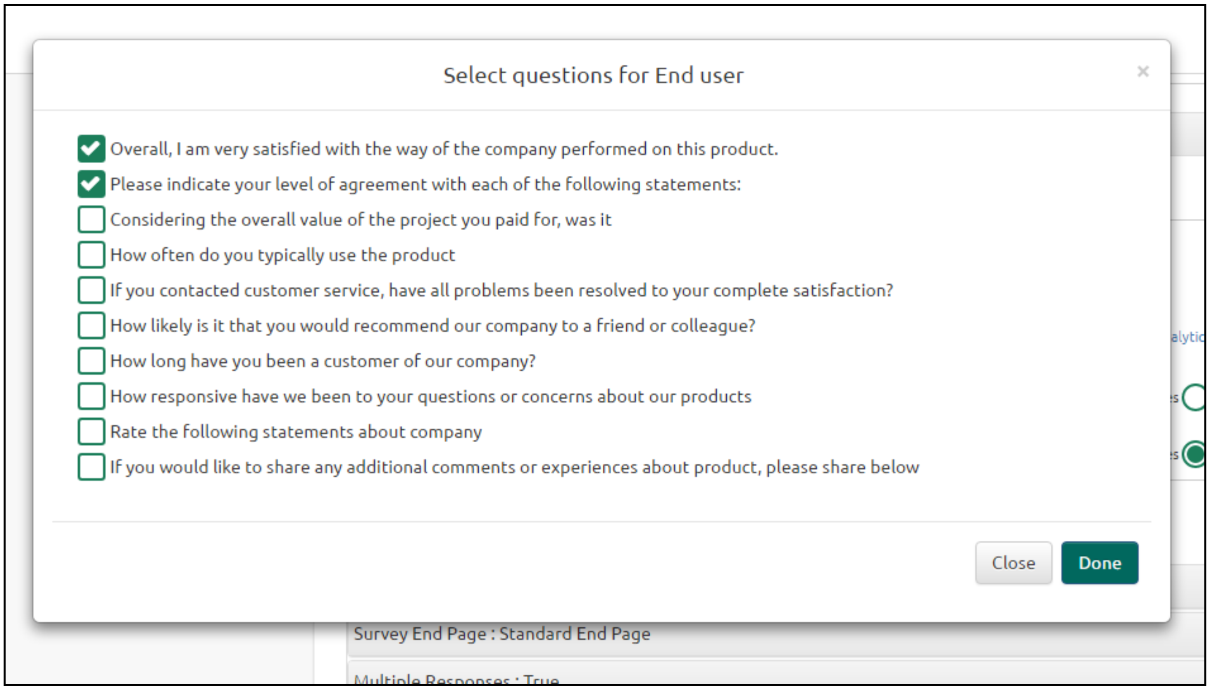
v) Click '**Edit**' provided at the end to save the updates.



- **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) Navigate to the '**Edit Collector**' Screen.
   ii) Select '**BizViz Analytics for End User**' option by check marking the box.
   iii) Carefully select the following details:
      a. **Select Questions**: Select a question from the drop-down menu to apply BizViz Analytics.
         i. Click '**Select questions for End user**' option.
         ii. A pop-up window will open containing the list of questions.
         iii. Select a question by check marking the box.
         iv. Click '**Done**'.



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:

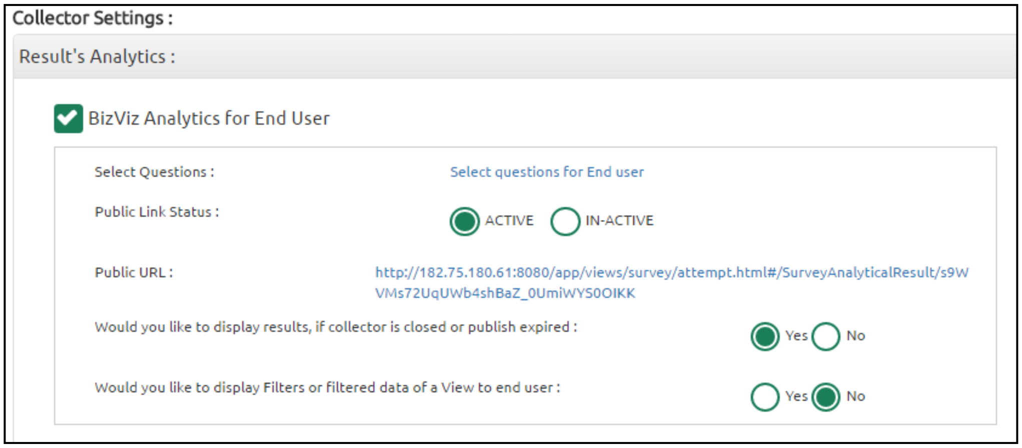
i. Select any one option out of '**Yes**' or '**No**'.

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.

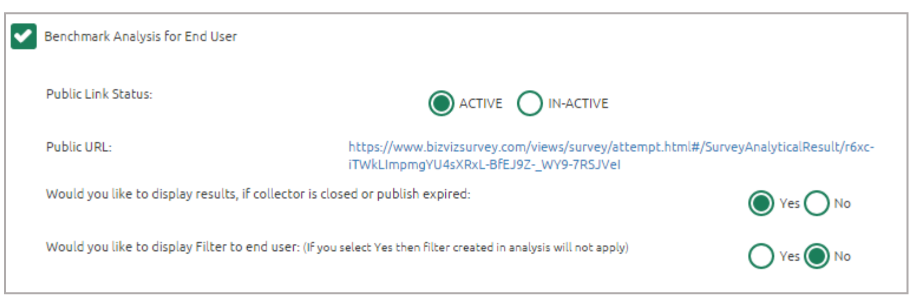


2. **Editing Benchmark Analysis for End User**
   i) Select '**Benchmark Analysis for End User**' option by check marking the box.
   ii) Carefully select below mentioned details:
      a. **Public Link Status**:
         i. Select '**ACTIVE**' option to enable the link.
         ii. Select '**IN-ACTIVE'** 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.

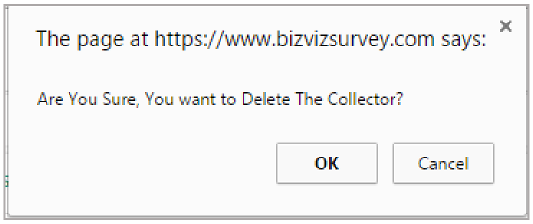
      c. **Display Filter Option:**
         i. Select any one option out of '**Yes**' or '**No**'.
         ii. Selecting '**Yes**' will display the applied filters to the end user.



Note: Same set of steps can be followed to edit Collector Settings for WebLink and Email collectors.

6.6. Deleting Collector(s)

i) Navigate to the '**Publish Your Survey**' list to access delete collector option.
ii) Click '**Delete**' provided next to a collector name.
iii) A pop-up window will appear to confirm the deletion.
iv) Click '**OK**'.



v) The selected collector will be deleted.

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

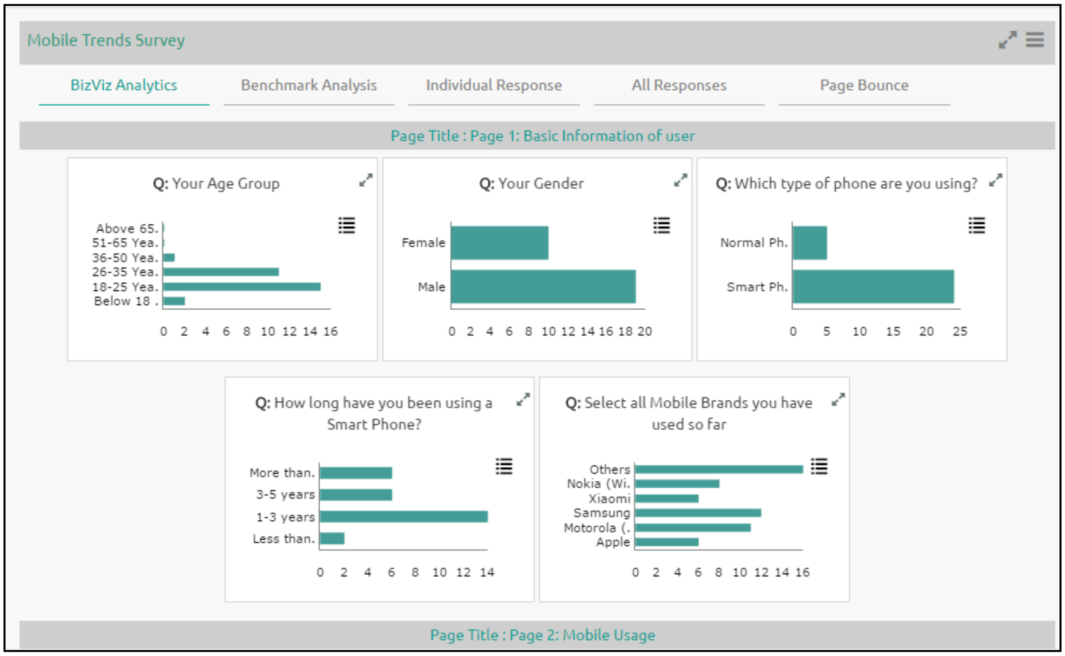
7. Analyzing Result for a Survey

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

i) Navigate to the survey list.
ii) Click '**Analyze Result**' .
iii) A new page will open containing various analytical options (in a menu row).
iv) Clicking on each option will open either a visual or information in the full screen.

7.1. BizViz Analysis

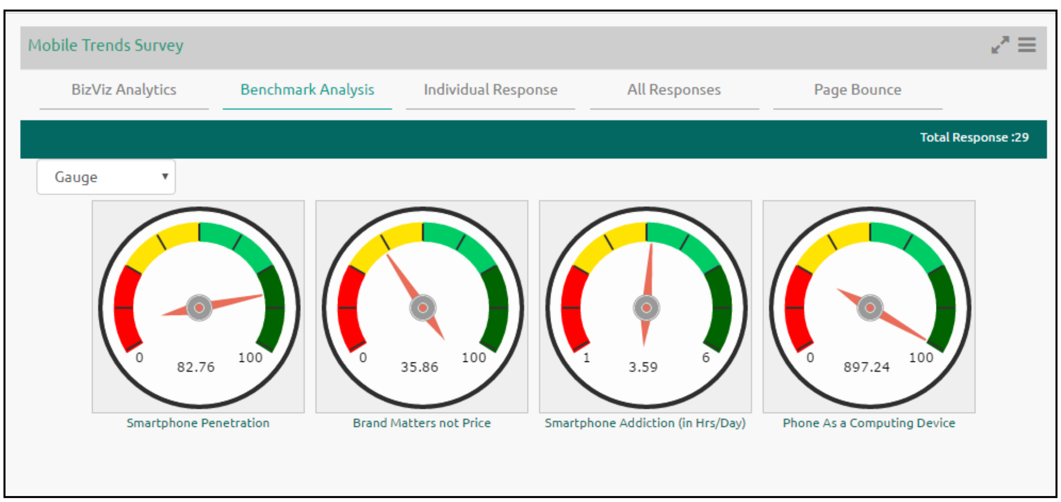
This section displays question specific analysis of the survey responses through graphical charts.



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

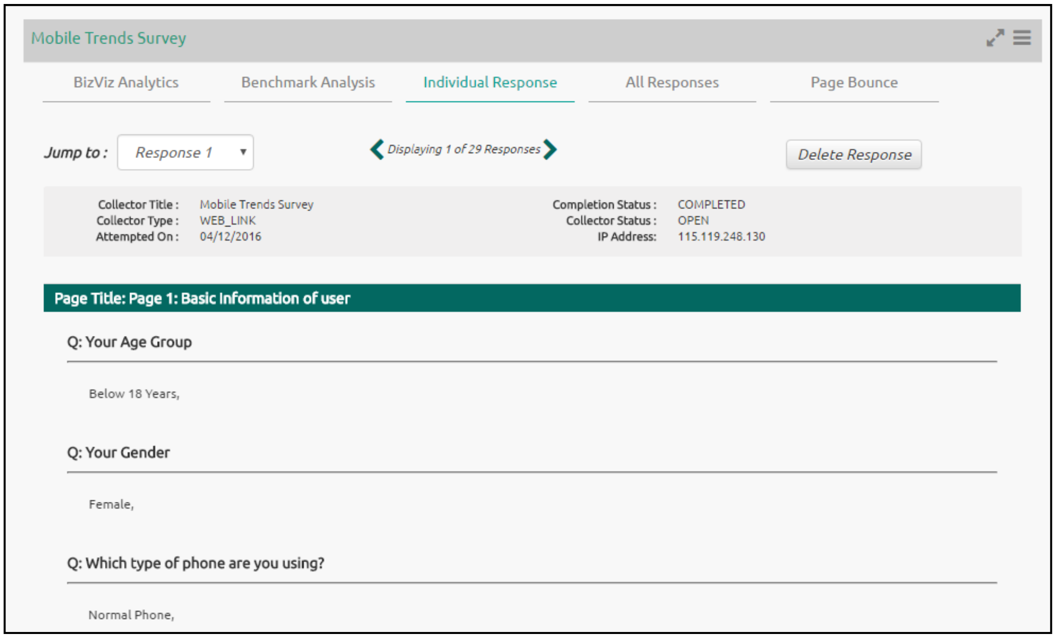
7.2. Benchmark Analysis

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



7.3. Individual Response

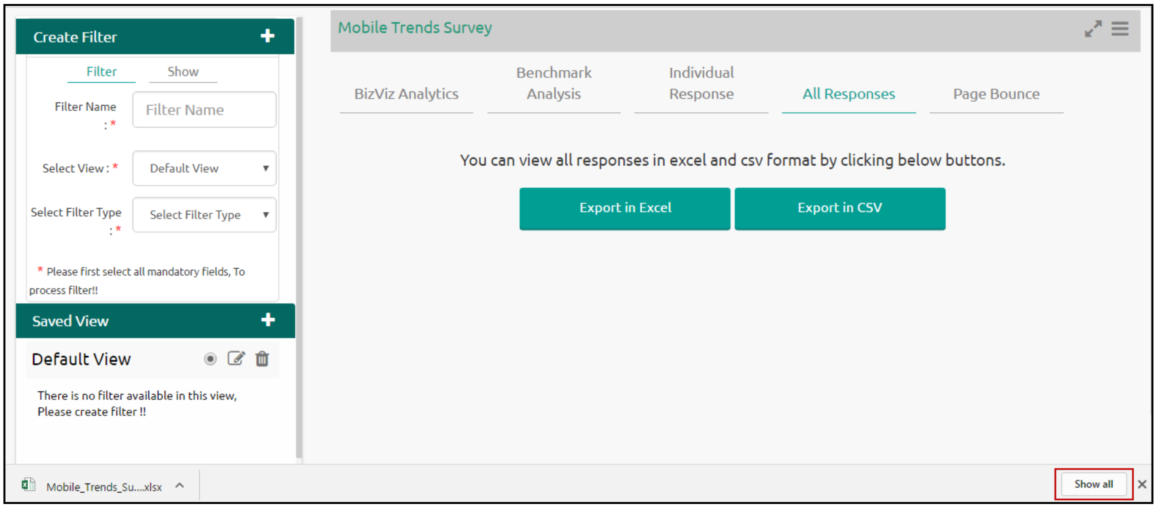
Response recorded from an individual for all the questions of a survey is presented through this option.



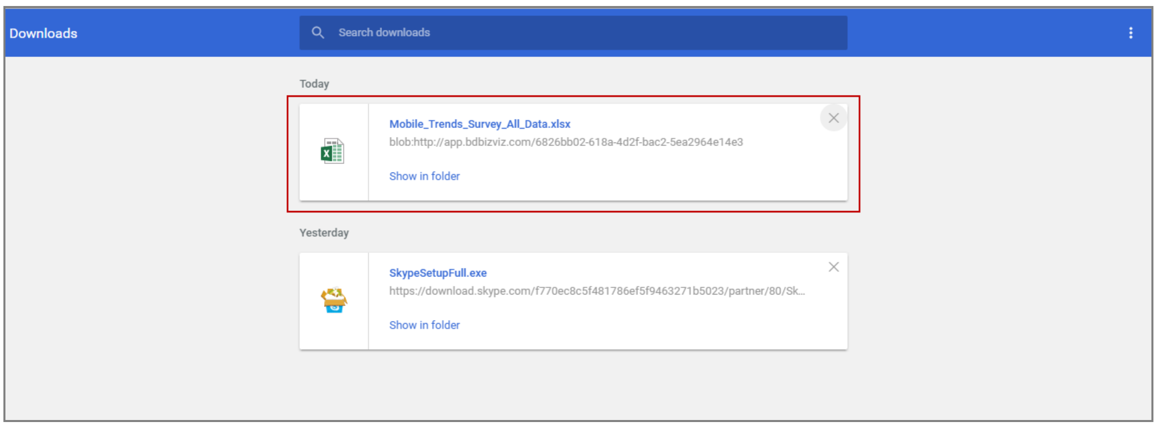
7.4. All Responses:

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

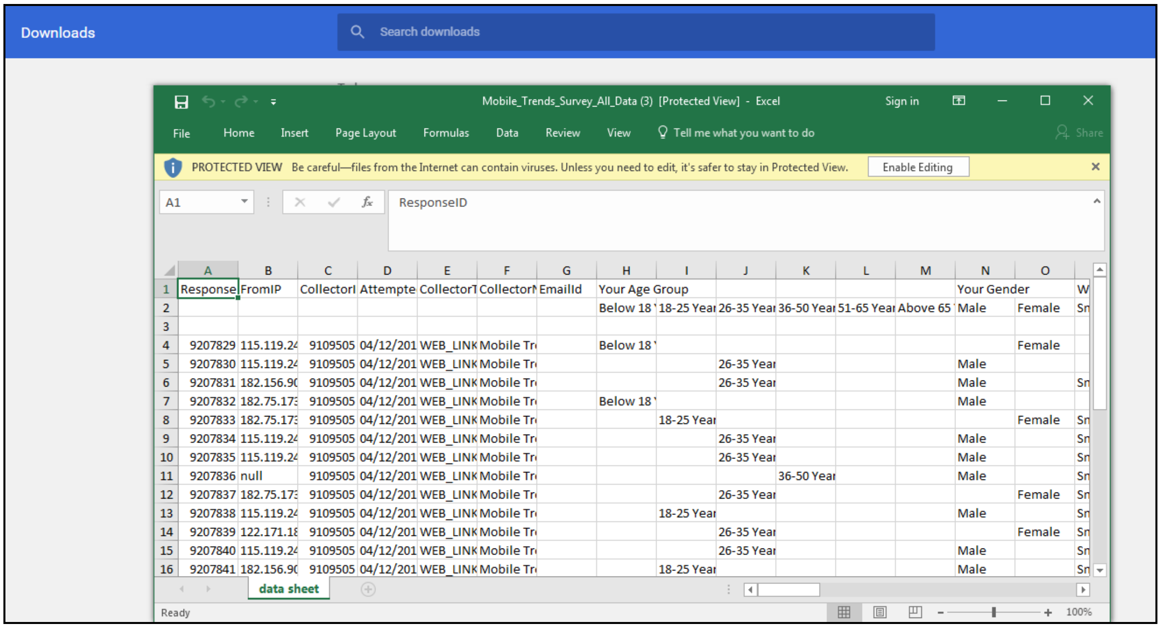
i) Click '**All Responses**'
ii) The following options will be provided to view the responses:
   1. **Export in Excel:**
      a. Click '**Export in Excel**'.
      b. All the responses will be exported in an Excel file.
      c. Click '**Show all'.**



d. A new page will be displayed with the downloaded file.



e. Click on the file to open it.

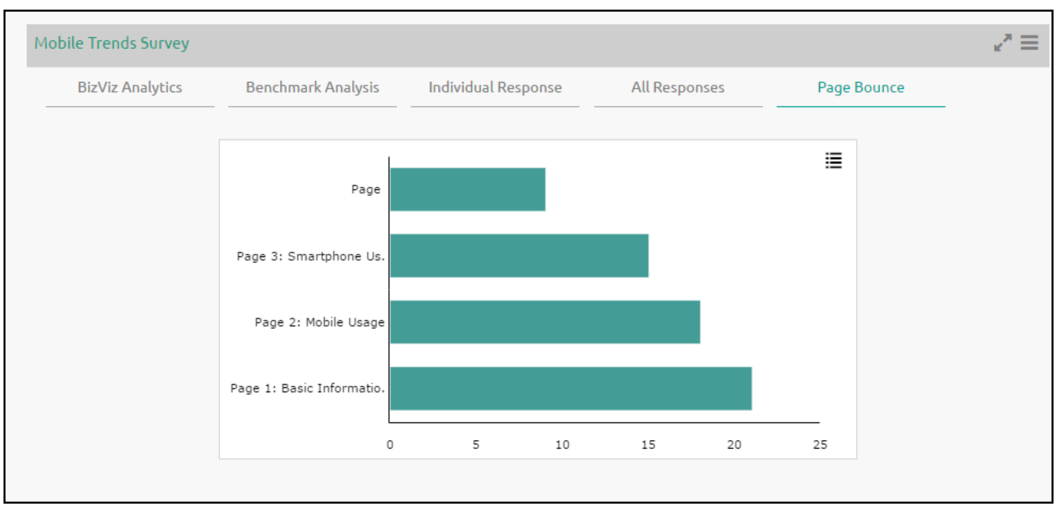


	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	Response	FromIP	CollectorI	Attempte	CollectorT	CollectorN	EmailId	Your Age Group						Your Gender		W
2								Below 18	18-25 Year	26-35 Year	36-50 Year	51-65 Year	Above 65	Male	Female	Sn
3																
4	9207829	115.119.24	9109505	04/12/201	WEB_LINK	Mobile Tr		Below 18							Female	
5	9207830	115.119.24	9109505	04/12/201	WEB_LINK	Mobile Tr				26-35 Year				Male		
6	9207831	182.156.9	9109505	04/12/201	WEB_LINK	Mobile Tr				26-35 Year				Male		Sn
7	9207832	182.75.17	9109505	04/12/201	WEB_LINK	Mobile Tr		Below 18						Male		
8	9207833	182.75.17	9109505	04/12/201	WEB_LINK	Mobile Tr			18-25 Year						Female	Sn
9	9207834	115.119.24	9109505	04/12/201	WEB_LINK	Mobile Tr				26-35 Year				Male		Sn
10	9207835	115.119.24	9109505	04/12/201	WEB_LINK	Mobile Tr				26-35 Year				Male		Sn
11	9207836	null	9109505	04/12/201	WEB_LINK	Mobile Tr					36-50 Year			Male		Sn
12	9207837	182.75.17	9109505	04/12/201	WEB_LINK	Mobile Tr				26-35 Year					Female	Sn
13	9207838	115.119.24	9109505	04/12/201	WEB_LINK	Mobile Tr			18-25 Year					Male		Sn
14	9207839	122.171.1	9109505	04/12/201	WEB_LINK	Mobile Tr				26-35 Year					Female	Sn
15	9207840	115.119.24	9109505	04/12/201	WEB_LINK	Mobile Tr				26-35 Year				Male		Sn
16	9207841	182.156.9	9109505	04/12/201	WEB_LINK	Mobile Tr			18-25 Year					Male		Sn

2. **Export in CSV:**
   Click '**Export in CSV**' and follow the same set of steps as mentioned for an Excel file to open the survey data in an exported CSV file.

7.5. Page Bounce

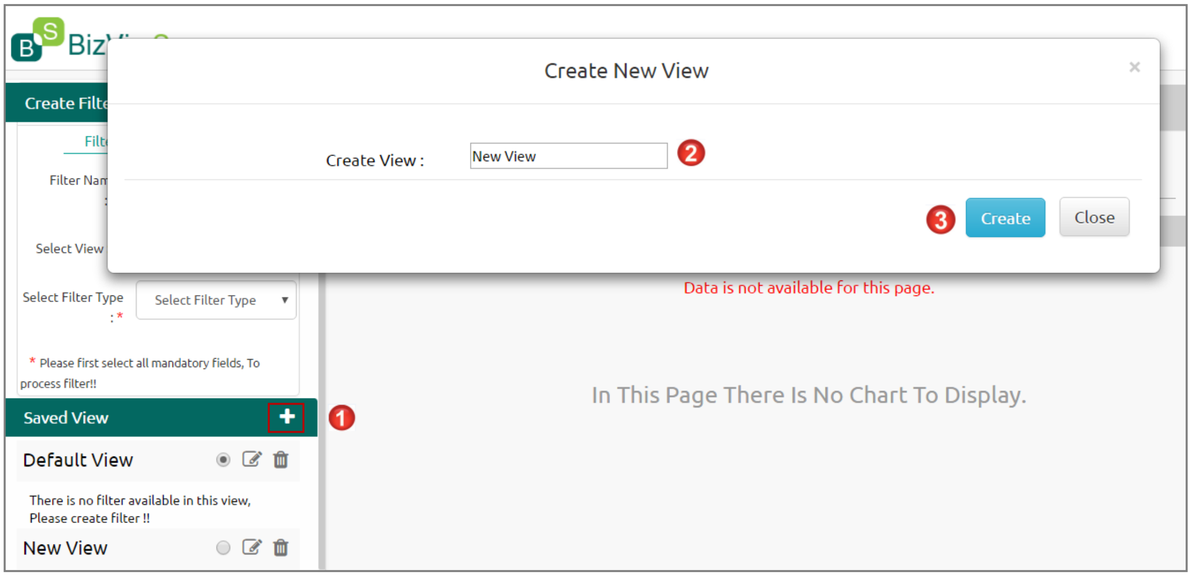
It points out when exactly a survey was ended by its recipients. Page wise proportions of responses are presented through an advanced analytical chart.



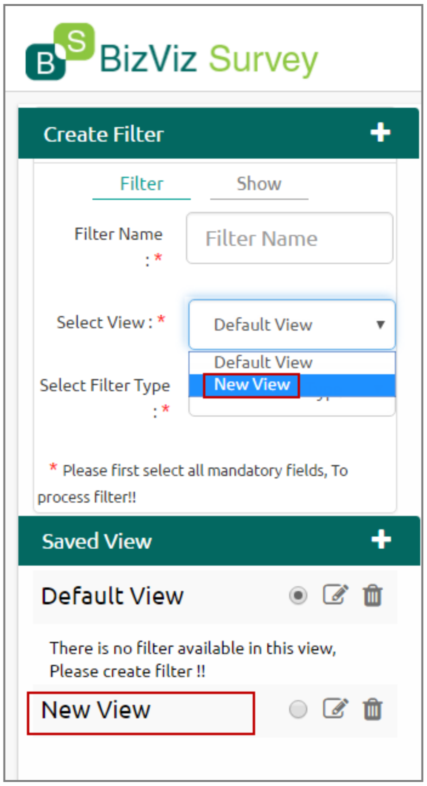
7.6. Creating a New View in the Analyze Result

Users can create a new view and implement it on Analyze Result.

i) Click the ‘**Add**’ symbol on the ‘**Saved View**’ row.
ii) Enter a View name in the pop-up window.
iii) Click ‘**Create**’.



iv) A new view will be created and added to the Saved View list.
v) Click the radio button to enable the new view in the Select View drop-down menu.



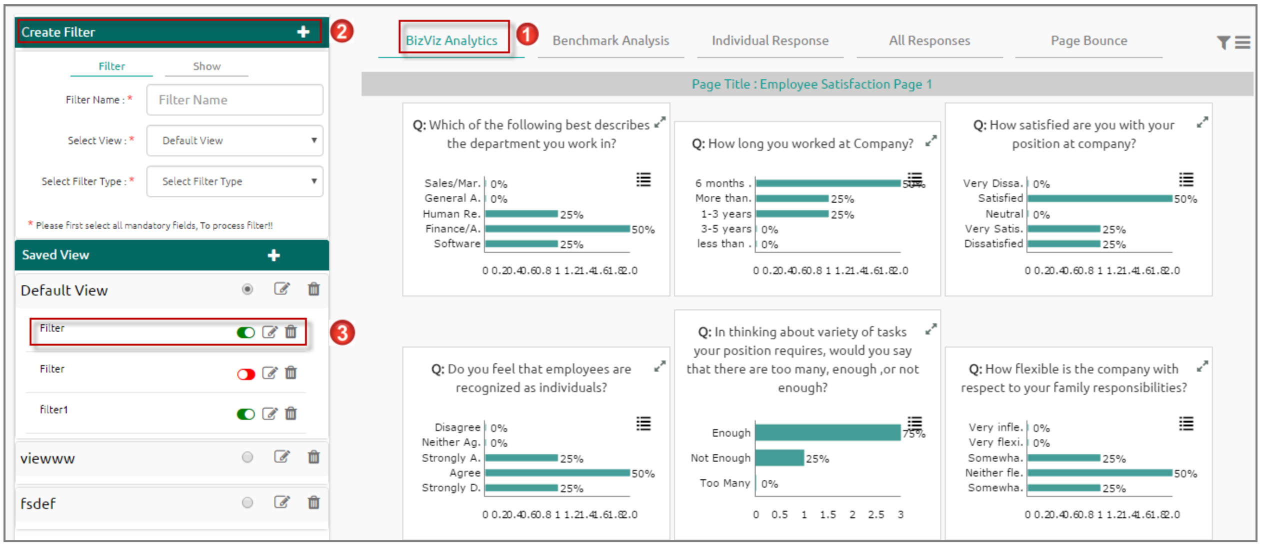
Note: Users can create a list of filters using each created view.

7.7. Filter Rule in the Analyze Result

By default, the Administrator will see all the responses on the '**Analyze Result**' page. To see a specific response, the admin will need to apply filters. Filter Rule has been introduced to customize the Analytic display.

Creating a Filter

i) Navigate to the Analyse Result page.
ii) '**Create Filter**' fields will be displayed on the left side of the page.
iii) Fill in the following information:
   a. Filter Name: Enter a title for the filter
   b. Select View: Select a view using the drop-down menu
   c. Select Filter Type: Select a filter type using the drop-down menu
   d. Select filter type related information as per the given instruction for each selected filter type
iv) Click '**Create Filter**'.
v) The newly created filter will be listed under '**Saved View'.**



Managing a Created Filter

Icon	Name of the Icon	Function
	Active/Inactive button	To activate or deactivate the applied filter rules
	Edit	To modify or change the filter name, filter view, and filter types choices
	Delete	To remove the selected filter

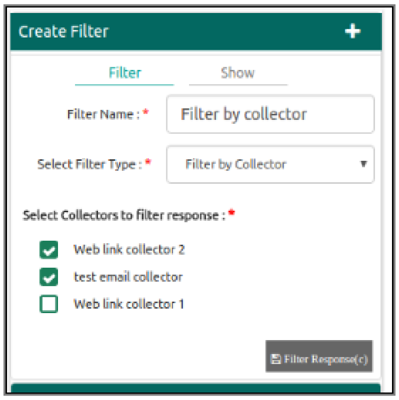
Filter Logic

- A single filter rule uses '**OR**' logic within the filter.
  E.g. the filter rule '**By Question and Answer**', when applied to a question with two possible answers, can show respondents who choose either of the answer options.
- When Multiple Filter rules are applied simultaneously, they will be combined using '**AND**' logic. Only results that meet both the selected Filter Rules are shown—a response must meet the criteria of all filters to be included in the filtered dataset.

Filter Types

1. Filter by Collector:

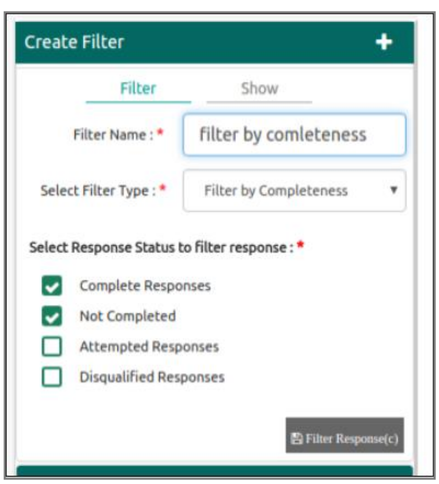
- Users can check the response of a specific collector by applying this filter.
- Users can select multiple collector filters.



Note: By default, data collected from all the collectors will be displayed.

2. Filter by Completeness

- The collected responses can be filtered by their status of completeness.
- The responses can be divided into 4 sections, based on their status:
  - Completed Responses
  - Not Completed
  - Attempted Responses
  - Disqualified Responses

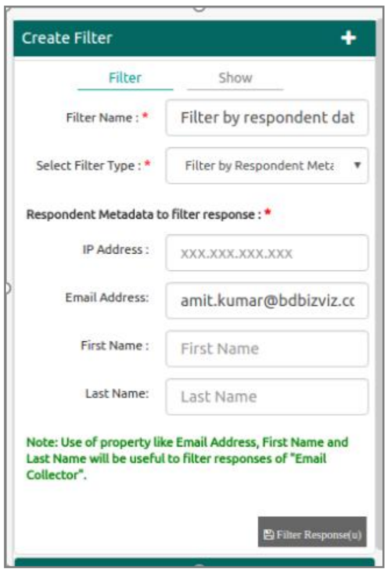


Note: By default, '**Completed**' and '**Disqualified**' responses are displayed

3. Filter by Respondent Metadata

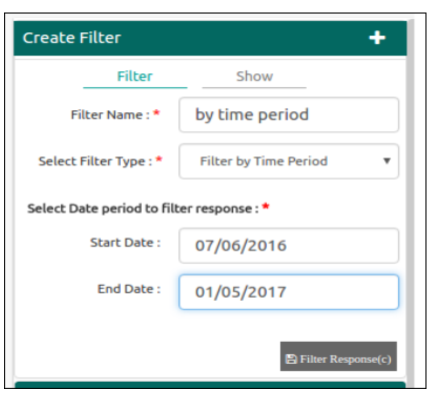
- The collected responses can be filtered based on the respondents' metadata
- Currently, 4 types of metadata details are included:
    - IP Address
    - Email Address
    - First Name
    - Last Name

- The collected responses can be filtered based on any one metadata criteria



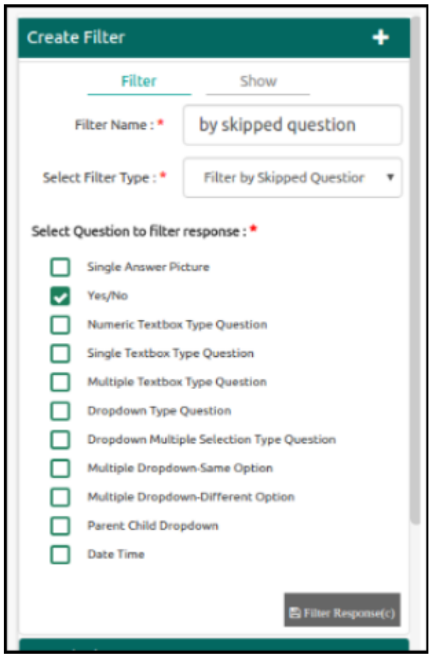
4. Filter by Time

- The time of response is captured when a response is saved
- Select a specific time by providing a start date and end date to filter responses



5. Filter by Skipped Questions

- This option can be used to view all the questions where the respondent has not attempted an answer.
- The survey administrator can select a question as the filter to collect responses.



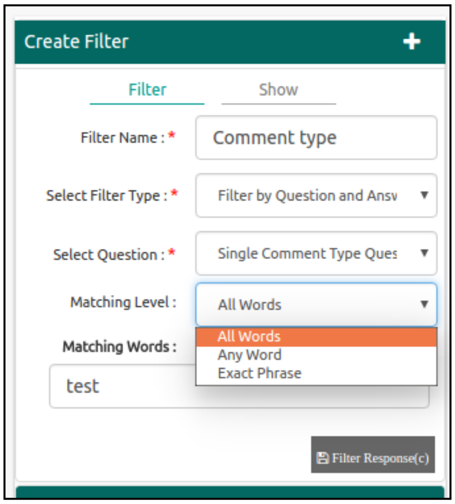
6. Filter by Question and Answer

- This filter option is based on the various question types provided for Survey.
- This option contains mainly 2 question types:
    - Closed-ended Questions: Questions with defined answer choices (E.g. Multiple Choice, Matrix, Drop-down etc.)
    - Open-ended Questions: Questions with undefined answer choices (E.g. Textbox, Comment, etc.)

- **Applying Question-Answer Filter to the Various Question Structures:**
  This section describes how the input has been taken for the following question types to filter responses.

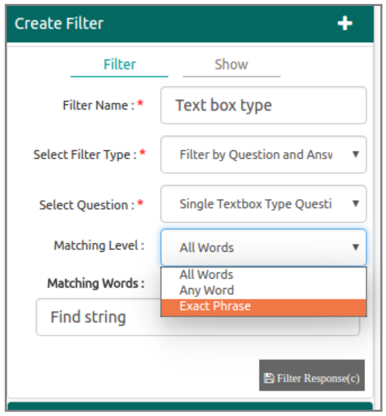
1. **Comment:**

a. Responses can be filtered by matching the entered text from Users' comment for this question type.
b. In case of big comments, it depends upon row and column size and text limitation.
c. Admin can filter some selected text from users' comment as response on any selected level.
d. Levels on which the text has been matched are:
   i. All Words
   ii. Any Word
   iii. Exact Phrase

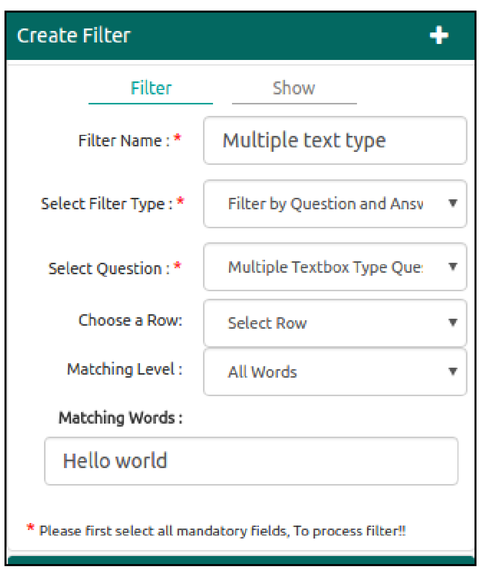


2. Textbox:

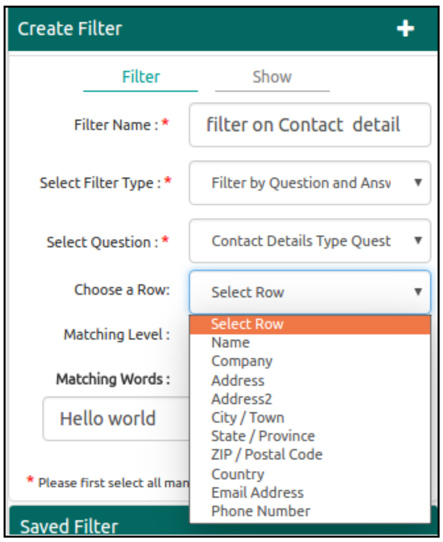
a. Responses can be filtered by matching the entered text from Users' comment for this question type.
b. This question type is mainly used for small comments.
c. Admin can filter some selected text from users' comment as response on any selected level.
d. Levels on which the text has been matched are:
   i. All Words
   ii. Any Word
   iii. Exact Phrase



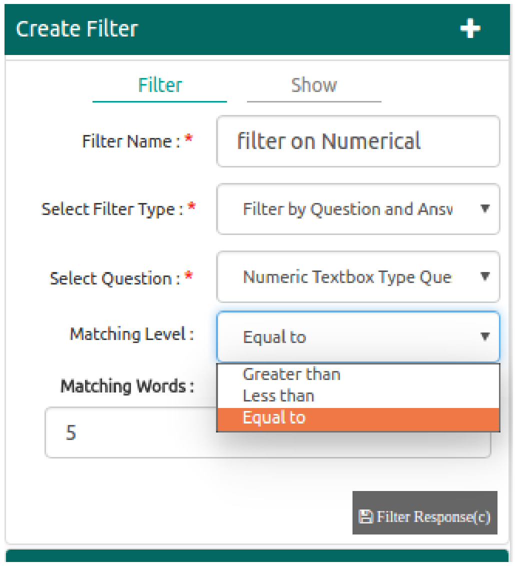
3. **Multiple Textbox:**
    a. Responses can be filtered by matching the entered text from Users' comment for this question type.
    b. This question type is same as Textbox, but users can choose multiple answer choices that will be determined through row.
    c. Admin can filter some selected text from users' comment for only one row of question and one matching level at a time.
    d. Levels on which the text has been matched are:
        i. All Words
        ii. Any Word
        iii. Exact Phrase



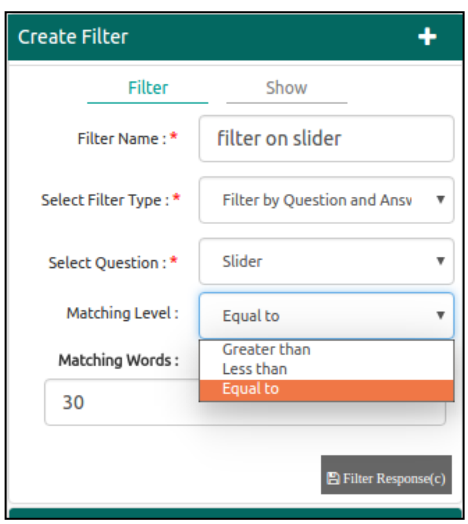
4. **Contact Details:**
    a. Responses can be filtered by matching the entered text from Users' response for this question type.
    b. This is same as Textbox, but the rows will be provided with fixed description in this type of question.
    c. Admin can filter some selected text from users' comment for only one row of question and one matching level at a time.
    d. Levels on which the text has been matched are:
        i. All Words
        ii. Any Word
        iii. Exact Phrase



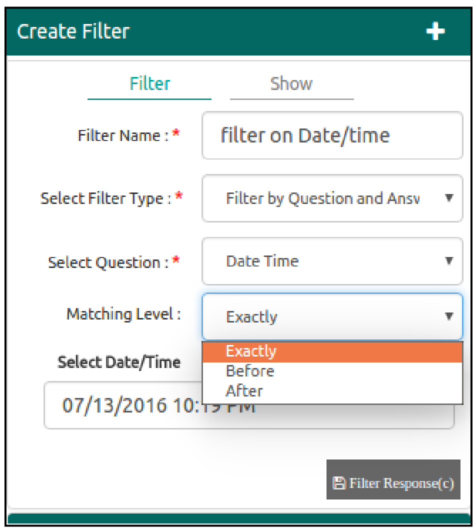
5. **Numerical Textbox:**
    a. Responses can be filtered by matching the entered number from Users' response.
    b. Responses can be filtered by given number in filter with all responses of this question.
    c. Constraints on which this filter will be applied are:
        i. Greater than
        ii. Less than
        iii. Equal to



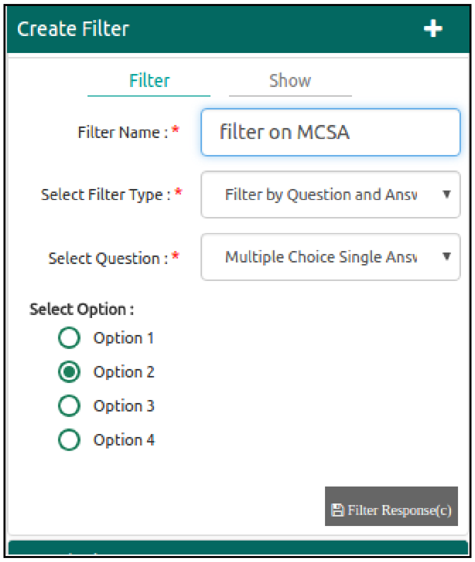
6. **Slider:**
    a. Responses can be filtered by matching the entered number from Users' response.
    b. This question type is same as Numerical type but users can have option to select value in each range only.
    c. Responses can be filtered by given number in filter with all responses of this question.
    d. The constraints on which this filter will be applied are:
        i. Greater than
        ii. Less than
        iii. Equal to



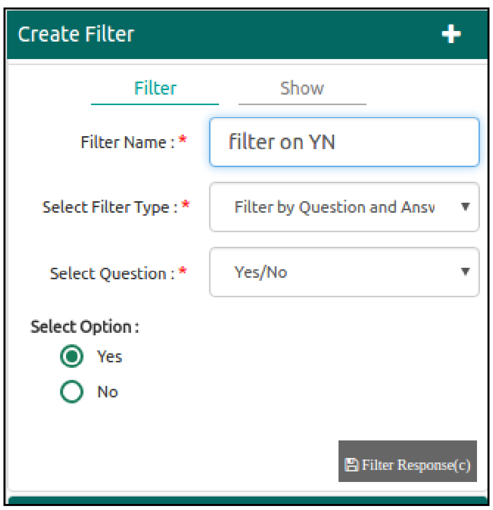
7. **Date and Time:**
   a. Responses can be filtered by matching the entered date from Users' response.
   b. This question type is same as Numerical type but users can have option to select value in each range only.
   c. Responses can be filtered by given date with constraints of matching level in filter with all responses of this question.
   d. The constraints on which this filter will be applied are:
      i. Exactly
      ii. Before
      iii. After
   e. The above-mentioned constraints will apply on the selected date.



8. **Multiple Choice Single Answer:**
   a. Responses can be filtered by matching the selected option from Users' response.
   b. Users can select only one option to filter the responses. The selected option will be reflected to all the tabs on the right panel.

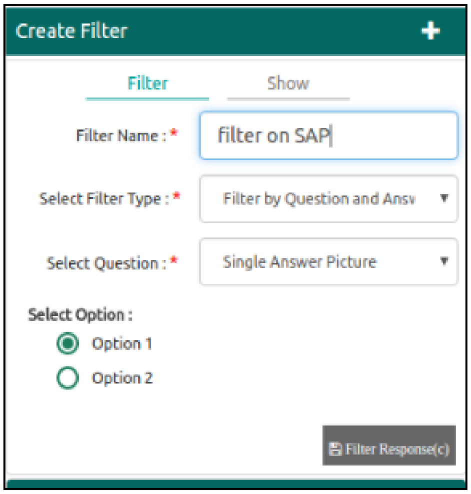


9. **Yes/No:**
    a. Responses can be filtered by matching the selected option.
    E.g. select either 'Yes' or 'No' option from Users' response.
    b. Users can select only one option to filter the responses. The selected option will be reflected to all the tabs on the right panel.



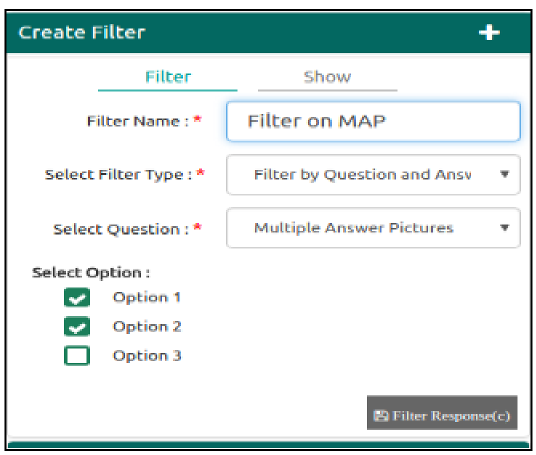
10. **Single Answer Picture:**
    a. Responses can be filtered by matching the selected option from Users' response.
    b. Users can select only one option to filter the responses. The selected option will be reflected to all the tabs on the right panel.

c. Users are provided with extra information.
   E.g. image with each option is available to express option very clearly.



11. Multiple Answer Picture:

a. Responses can be filtered by matching the selected option from Users' response.
b. Users can select multiple options to filter the responses. Apply 'OR' logic on the selected options.



12. Net Promotor Score:

a. Responses can be filtered by matching the selected option from Users' response.

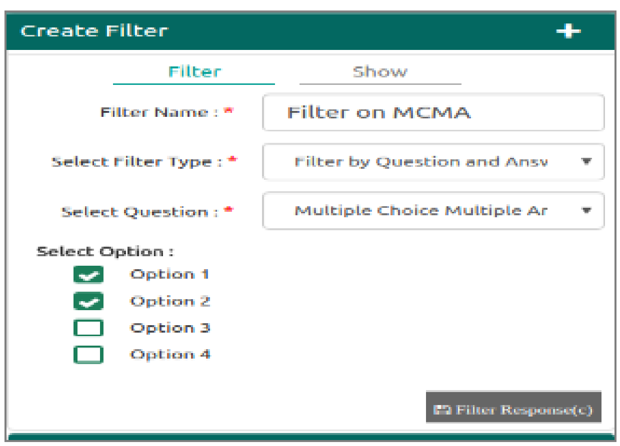
b. Users can select multiple options to filter the responses. Apply ‘OR’ logic on the selected options.

x

13. Multiple Choice Multiple Answer:

a. Responses can be filtered by matching the selected option from Users’ response.

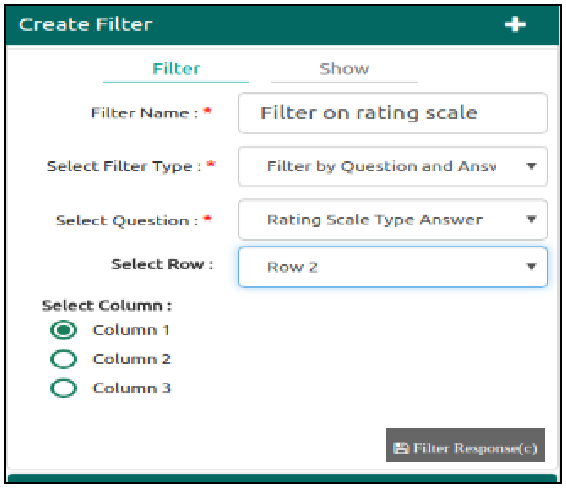
b. Users can select multiple options to filter the responses. Apply ‘OR’ logic on the selected options.



14. Rating Scale:

a. Responses can be filtered by matching the selected option from Users’ response.

b. Users can select any one row value from the drop-down menu and any one column from the radio box. Based on this selection response will be filtered.

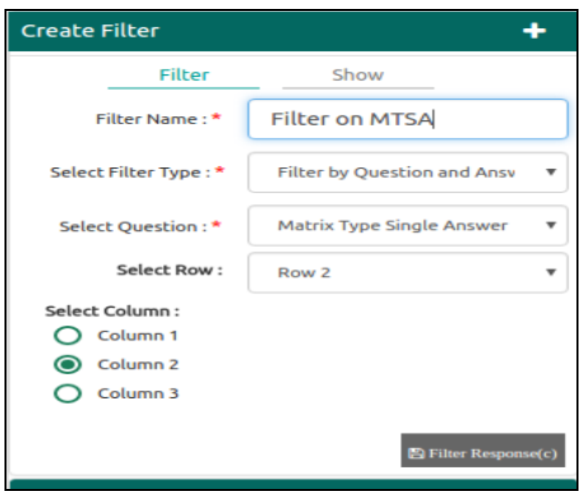


15. Matrix Single Answer Per Row:

a. Responses can be filtered by matching the selected option from Users' response.

b. Users can select any one row value from the drop-down menu and any one column from the radio box. Based on this selection response will be filtered.

c. Each selection is mandatory.

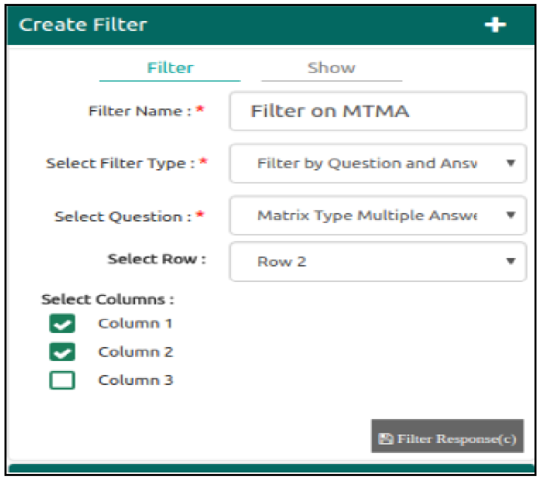


16. Matrix Multiple Answer Per Row:

a. Responses can be filtered by matching the selected option from Users' response.

b. Users can select any one row value from the drop-down menu and any one column from the check box. Based on this selection response will be filtered.

c. Each selection is mandatory.

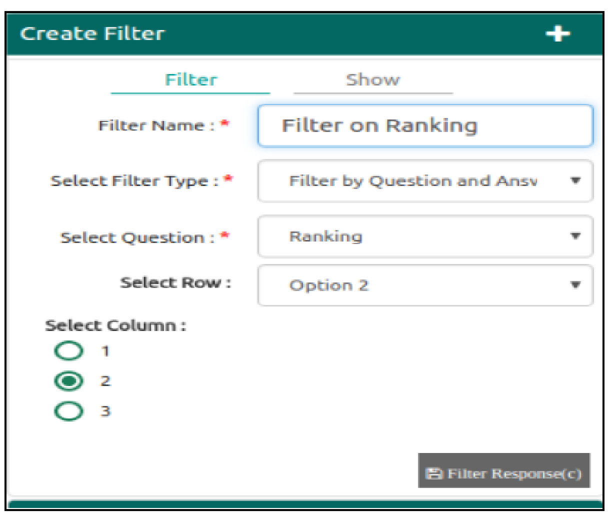


17. Ranking:

a. Responses can be filtered by matching the selected option from Users' response.

b. Users can select any one row value from the drop-down menu and any one column from the radio box as rank. Based on this selection response will be filtered.

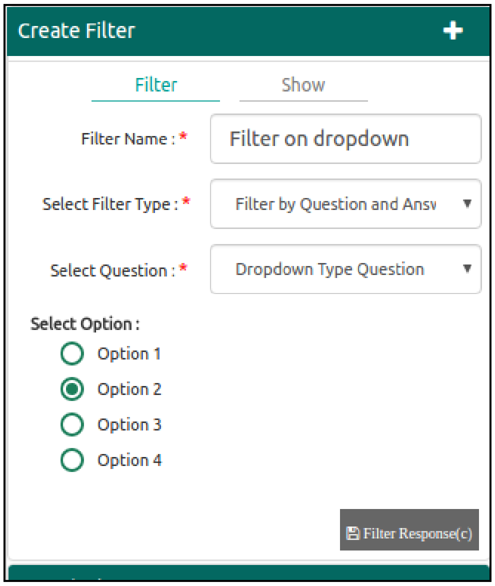
c. Each selection is mandatory.



18. Dropdown:

a. Responses can be filtered by matching the selected option from Users' response.

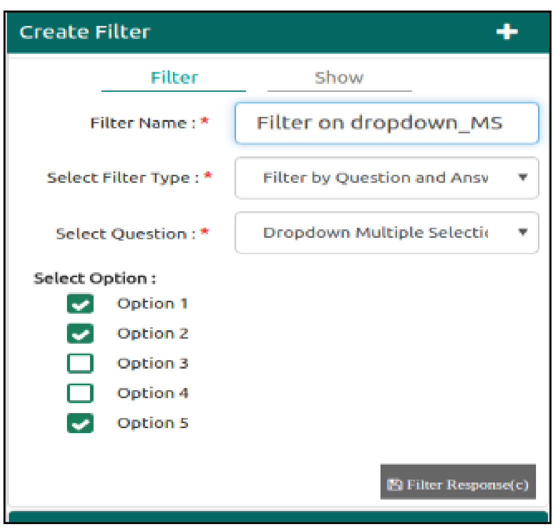
b. Users can select only one option to filter the responses. The selected option will be reflected to all the tabs on the right panel.



19. Dropdown Multiple Selection:

a. Responses can be filtered by matching the selected option from Users' response.

b. Users can select multiple options to filter the responses. Apply 'OR' logic on the selected options. The selected options will be reflected to all the tabs on the right panel.

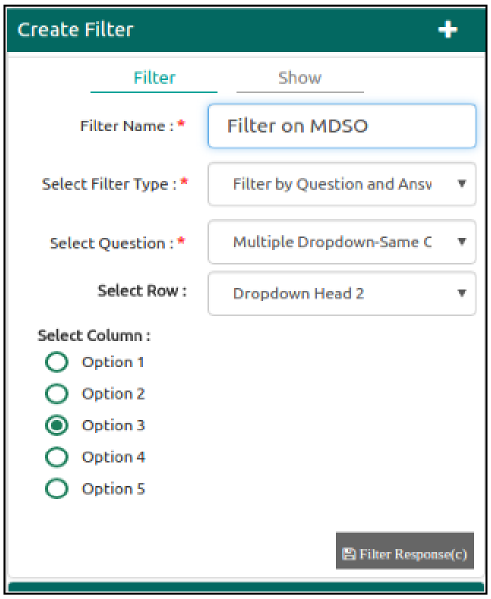


20. Multiple Dropdown Same Option:

a. Responses can be filtered by matching the selected option from Users' response.

b. Users can select any one row value from the drop-down (i.e. 'dropdown head') and any one column from the radio box to filter responses. Based on this selection response will be filtered.

c. Each selection is mandatory.

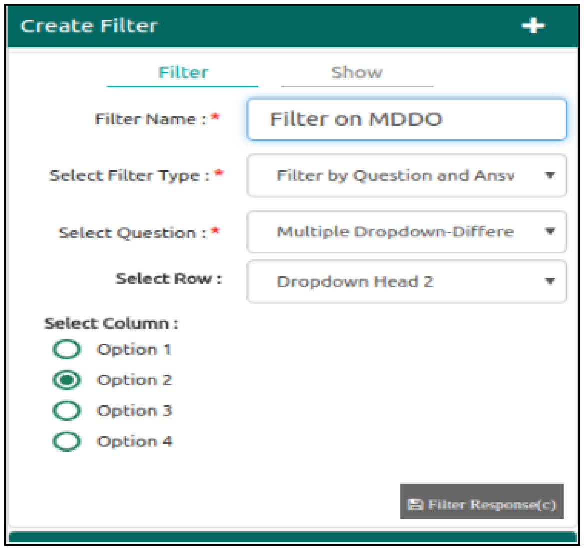


21. Multiple Dropdown Different Option:

a. Responses can be filtered by matching the selected options from Users' response.

b. Users can select any one row value from the drop-down (i.e. 'dropdown head') and any one column from the radio box to filter responses. Based on this selection response will be filtered.

c. Each selection is mandatory.

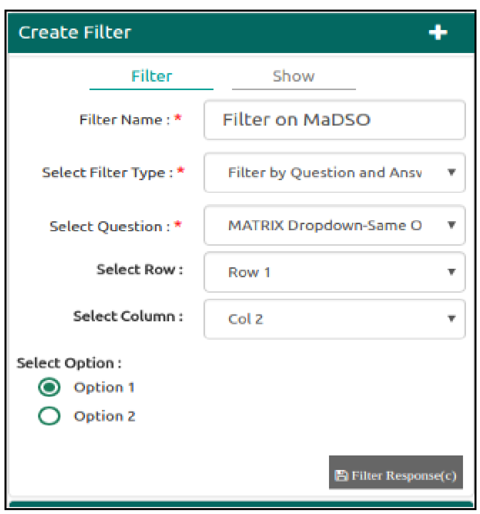


22. Matrix of Dropdown Same Option:

a. Responses can be filtered by matching the selected options from Users' response.

b. Users can select any one row value, one column value from the drop-down menu and any one option from the radio box. Based on this selection response will be filtered.

c. Each selection is mandatory.

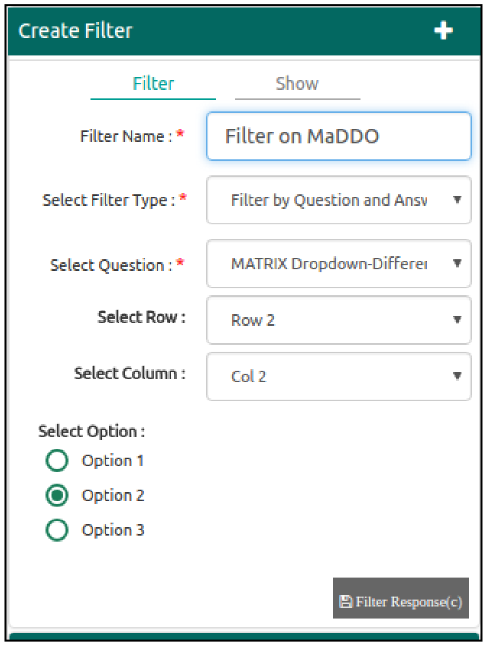


23. Matrix of Dropdown Different Option:

a. Responses can be filtered by matching the selected options from Users' response.

b. Users can select any one row value, one column value from the drop-down menu and any one option from the radio box. Based on this selection response will be filtered.

c. Each selection is mandatory.

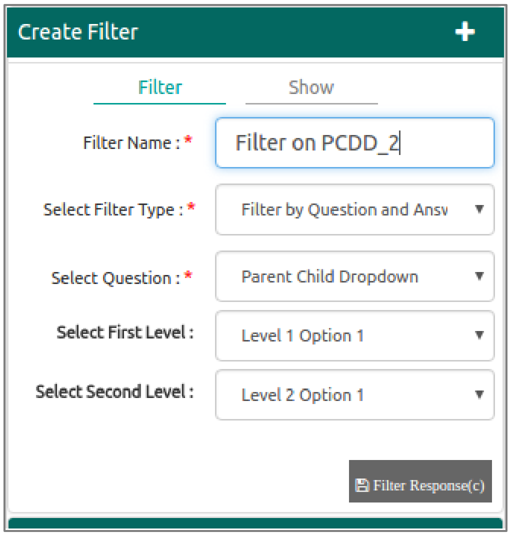


24. Parent Child Dropdown for Level 2:

a. Responses can be filtered by matching the selected options from Users' response.

b. Users must select any one option from the 'First Level' drop-down menu and one option from the 'Second Level' drop-down menu. Based on this selection response will be filtered.

c. Each selection is mandatory.

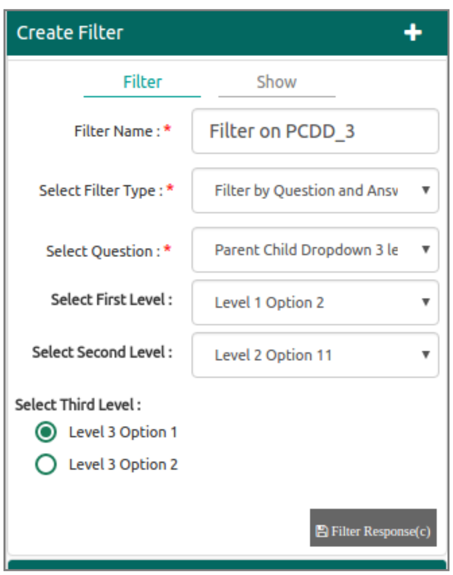


25. Parent Child Dropdown for Level 3:

a. Responses can be filtered by matching the selected options from Users' response.

b. Users must select one option from the 'First Level' drop-down menu, one option from the 'Second Level' drop-down menu, and one option from the 'Third Level' radio box. Based on this selection response will be filtered.

c. Each selection is mandatory.

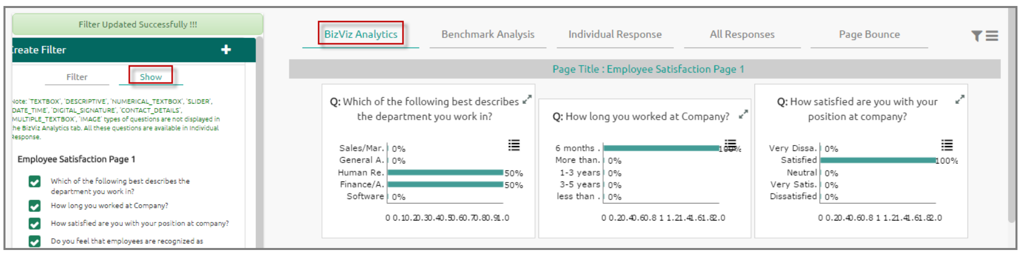


Note: Some Question types are not added in this filter type such as, Signature, File Upload, Image, Descriptive.

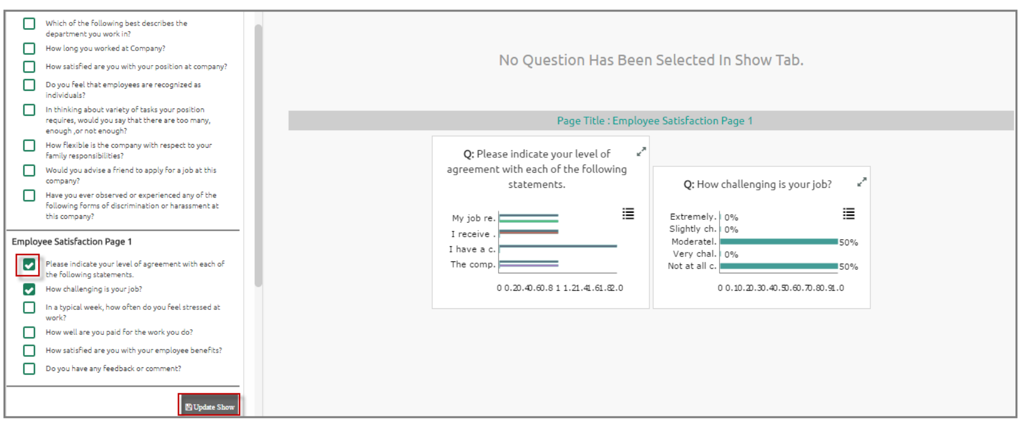
7.8. Show/Hide Rules for Page/Questions

Show Rule will display only the results of the selected questions or specific pages from the Survey.

i) Navigate to the Analyze Result page.
ii) Select '**Show**'.



iii) All the Survey questions will be listed.
iv) Select questions by check marking in the question's check box.
v) Click '**Update Show**'.
vi) Results for the selected questions will be displayed on the analyse result page.



Note: Only one '**Show**' rule can be active at a time.

8. More Options

This segment describes various options to be applied on a Survey.

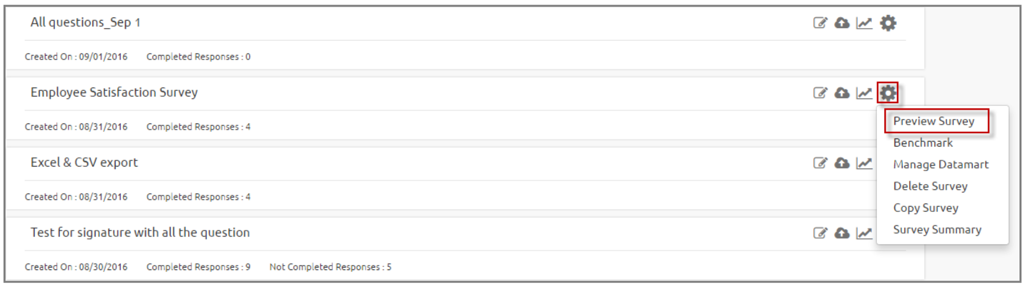
8.1. Preview Survey

i) Navigate to the survey list.

ii) Click '**Settings**' for options.

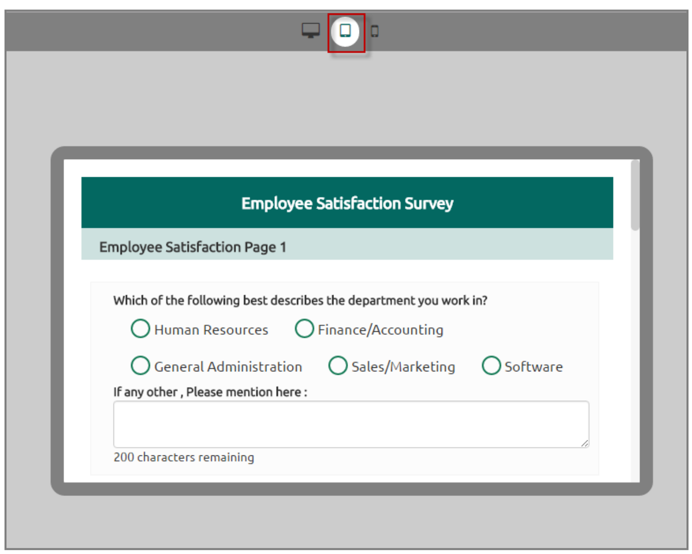
iii) Select '**Preview Survey**'.

iv) Users will be redirected to the '**Preview**' page.



v) Select any of the device option at the top of the page.

vi) The Survey questions will be displayed in the selected preview mode.



vii) Click on the '**Close**' option (provided for the preview page) to close the preview.

Note: By default, the Desktop preview will open.

8.2. Benchmark

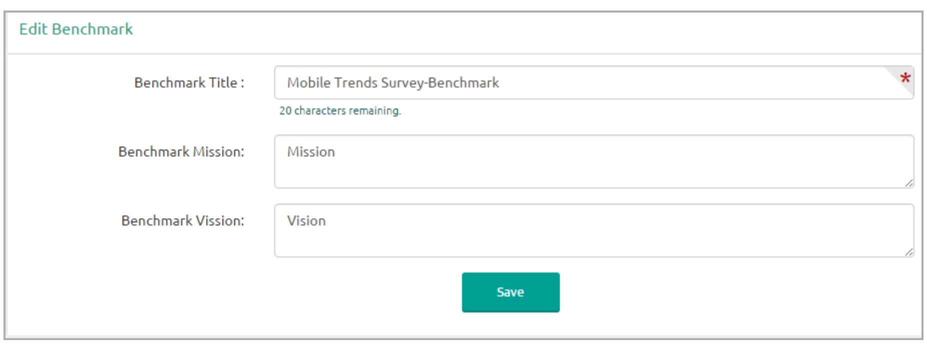
Benchmark is a standard or point of reference for evaluating performance or level of quality. It is pre-requisite to set goals, before using Benchmark as a logic or point of reference to derive at the desired comparison.

8.2.1. Editing a Benchmark

i) Navigate to the Survey home page.
ii) Select a survey from the list.
iii) Click '**Settings**' provided next to a survey name.
iv) A context menu will open.
v) Select '**Benchmark**' from the menu list.
vi) Users will be redirected to the '**Edit Benchmark**' page.
vii) 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**' by default.
viii) Users can edit the below mentioned fields (if desired). Such as:

- Benchmark Title
- Benchmark Mission
- Benchmark Vision

ix) Click '**Save**' to save the edited information.



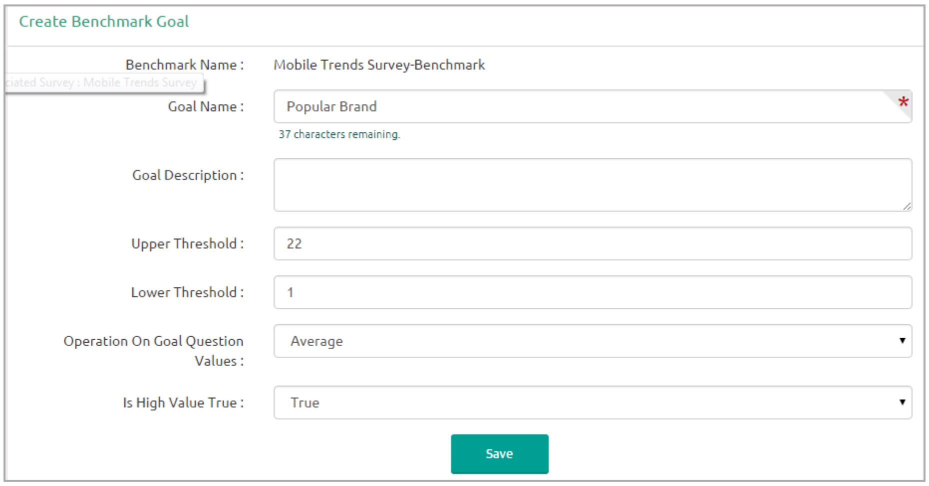
8.2.2. Adding Goal to a Benchmark

i) Navigate to the benchmark page.
ii) Click '**Add New Goal**' on the left pane of the page.
iii) Users will be redirected to the '**Create Benchmark Goal**' page.
iv) Fill in the following information:

- Goal Name
- Goal Description

- Upper Threshold
- Lower Threshold
- Operation on Goal Question Values: Select an option from the drop-down menu
- Is High Value True: Select an option from the drop-down menu

v) Click '**Save**'.



vi) A Benchmark goal will be added to the benchmark.

Note:

a. Benchmark name will be displayed by default.
b. Fields with validation symbol * are mandatory.
c. It is advisable to select '**True**' option for '**Is High Value** True' field.

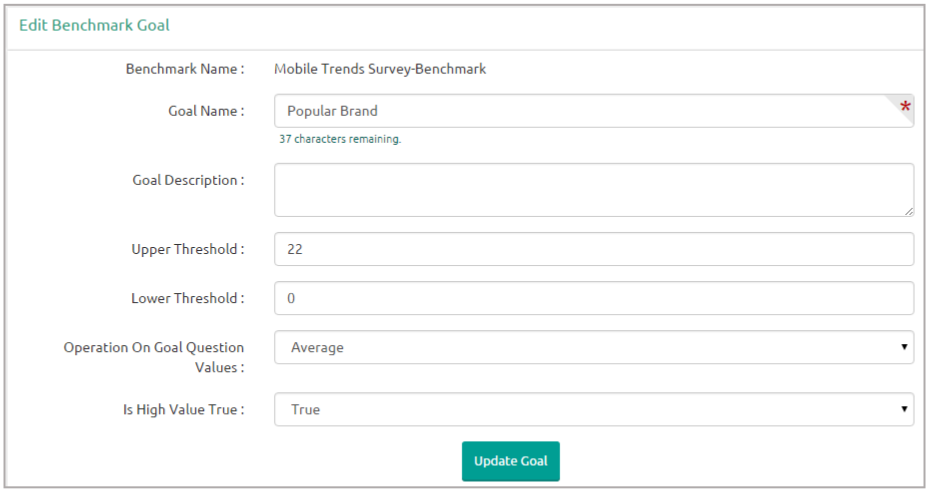
8.2.3. Editing a Benchmark Goal

i) Select '**Edit**' provided next to a Benchmark goal name (on the left pane of the page).
ii) Users will be redirected to the '**Edit Benchmark Goal**' page (on the right pane of the page).
iii) Edit the below mentioned details (if desired):

- Goal Name
- Goal Description
- Upper Threshold
- Lower Threshold

- Operation on Goal Question Values: select an option from the drop-down menu
- Is High Value True: Select an option from the drop-down menu

iv) Click ‘**Update Goal**’.



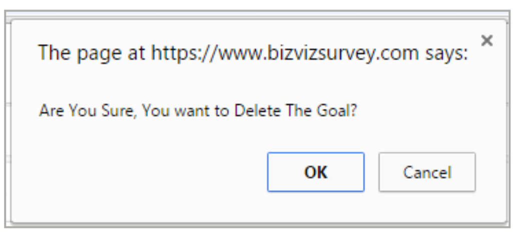
v) The edited goal information will be saved.

8.2.4. Deleting a Benchmark Goal

i) Select ‘**Delete**’ provided next to the benchmark goal name (on the left pane of the page).

ii) A pop-up message will appear to confirm deletion.

iii) Click on ‘**OK**’.

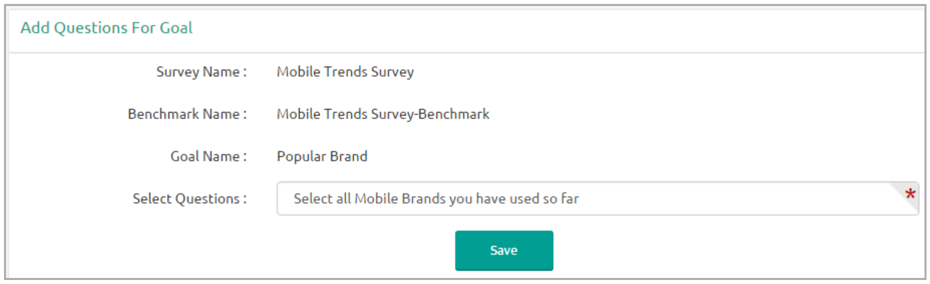


iv) The selected benchmark goal will be deleted.

8.2.5. Adding Questions to a Benchmark Goal

i) By clicking ‘**Save**’ from the ‘**Create Benchmark Goal**’ users will be directed to ‘**Add Questions for Goal**’ page.

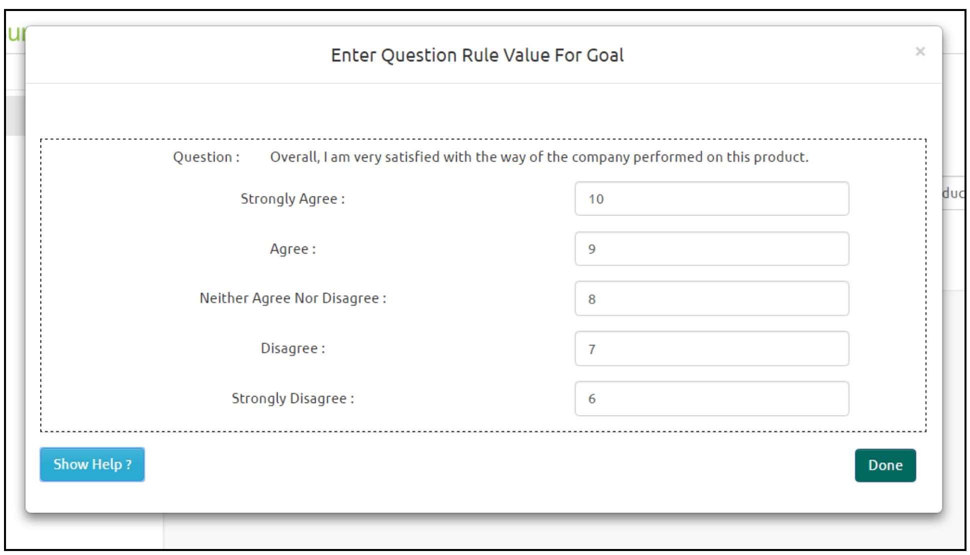
ii) Select Questions using the drop-down menu.



iii) Users to ‘**Enter Question Rule Value for Goal**’ screen.
iv) Select value for each answer option.
v) Select an ‘**Operation**’ to be performed on the answer options (if asked based on the question type).
Three options will be provided under the ‘**Operation**’ drop-down menu:

- Addition
- Multiplication
- Average

vi) Click ‘**Done**’.



vii) Users will be directed back to the ‘**Add Questions for Goal**’ page.
viii) Click ‘**Save**’.
ix) Selected question will be successfully added to the Benchmark Goal.

Note:

a. Users cannot exceed the set threshold limits while entering question rule value for a goal or selecting an operation.
b. Click 'Show Help?' to display an example to be followed for the question rule value.

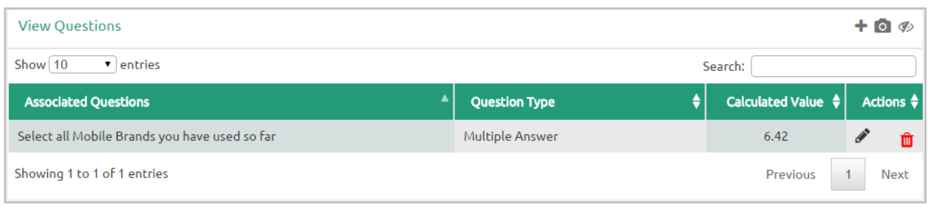
8.2.6. Viewing a Goal Question

i) Navigate to the benchmark goal page.

ii) Click '**View Goal Question**'

iii) A list view of all the added questions will be displayed as per:

- Associated Questions
- Question Type
- Calculated Value
- Actions



Note: Click '**Edit Question**' provided under '**Actions**' to edit the entered question rule value for goal or chosen operation.

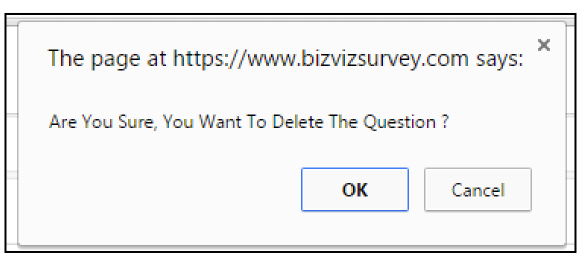
8.2.7. Deleting a Benchmark Goal Question

i) Navigate to the question list for a benchmark goal.

ii) Click '**Delete**' provided under '**Actions**'.

iii) A pop-up window will appear to confirm the deletion.

iv) Click '**OK**'.



v) Selected question will be removed from the benchmark goal.

8.3. Managing Datamart

Datamart option is provided to write the survey data inside a data base. This function can help the user to store the collected responses of a survey and update them.

8.3.1. Creating a Datamart

i) Navigate to the survey home page.

ii) Click '**Settings**' button provided next to a survey name.

iii) A drop-down menu will be displayed.

iv) Select '**Manage Datamart**' option from the drop-down menu.

v) A new screen will be launched to create/ update Datamart.

vi) Fill the following information:

a. **Datamart Status**: It will show that no Datamart has been created.

b. **Database Type**: Currently **MySQL** database is supported.

c. **Database Name**: Enter a name of the database where you want to write the survey data

d. **URL**: Enter the proper IP link or data address

e. **Port:** Provide port number

f. **User Name**: Provide user name

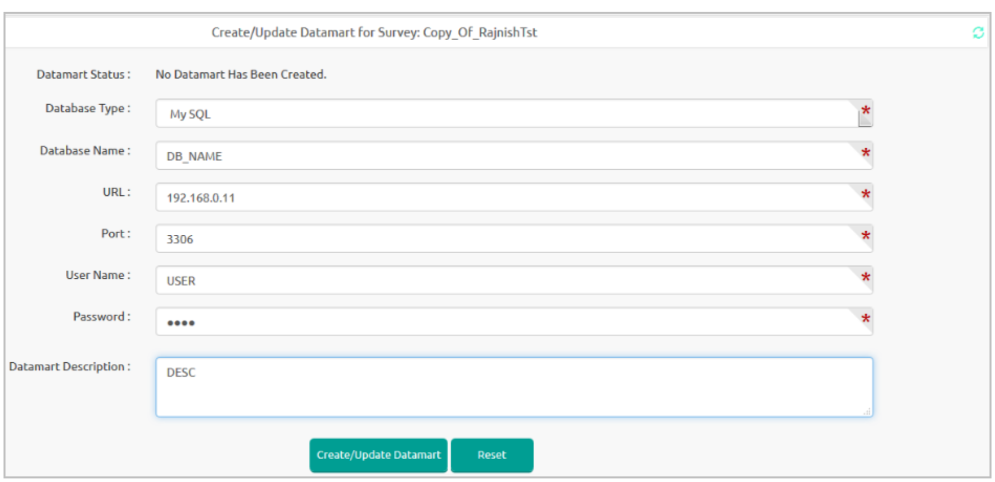
g. **Password:** Provide password

h. **Datamart Description**: Enter description about the Datamart. (It is an optional field)

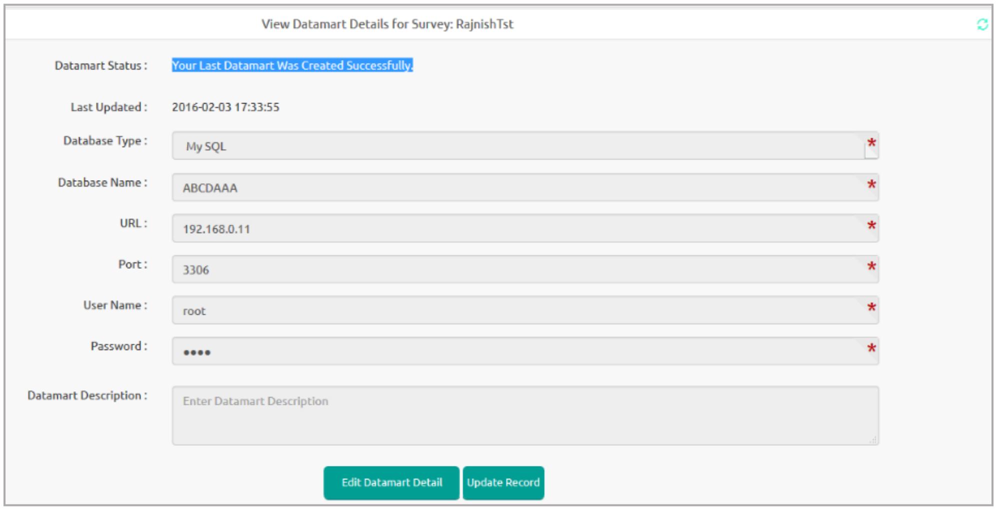
vii) Click **'Create/ Update Datamart**' to create a Datamart.

OR

Click **'Reset'** to reset the details (if required).



viii) Users will be directed to a new page (if a Datamart is created successfully) and the '**Datamart Status**' displayed on that page will confirm successful creation of a Datamart.

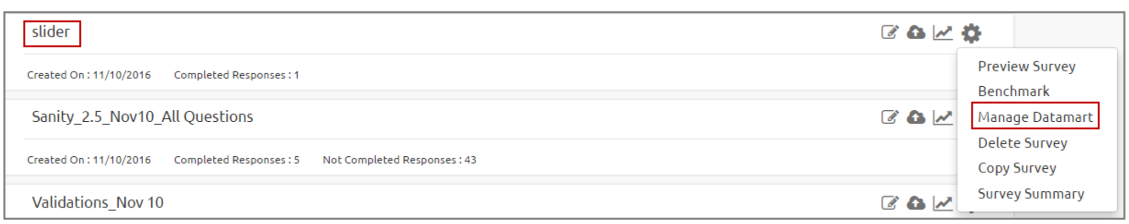


8.3.2. Implementing Scheduler in the DataMart Section

i) Select a Survey from the Survey list.

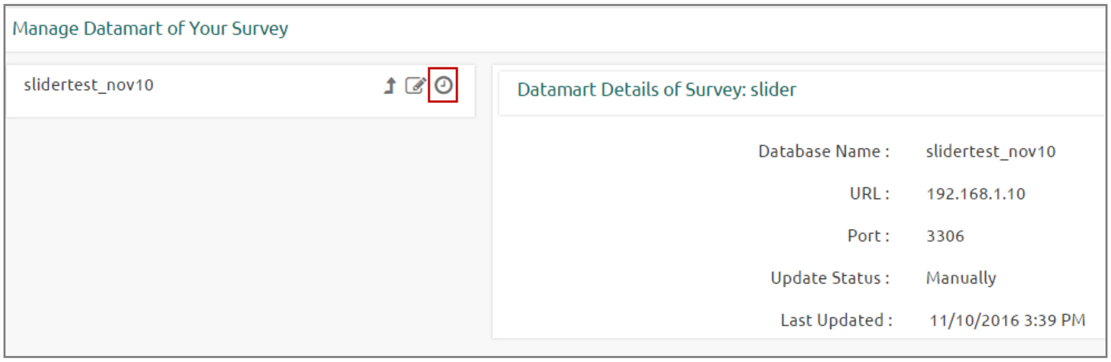
ii) Click '**More Options**'

iii) Select '**Manage DataMart**' option from the menu.



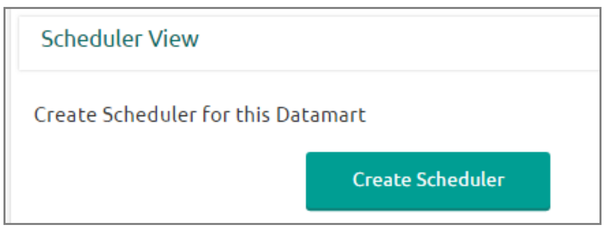
iv) DataMart details will be displayed.

v) Click '**Update Settings**'



vi) The '**Scheduler View**' page will be displayed.

vii) Click '**Create Scheduler**'.

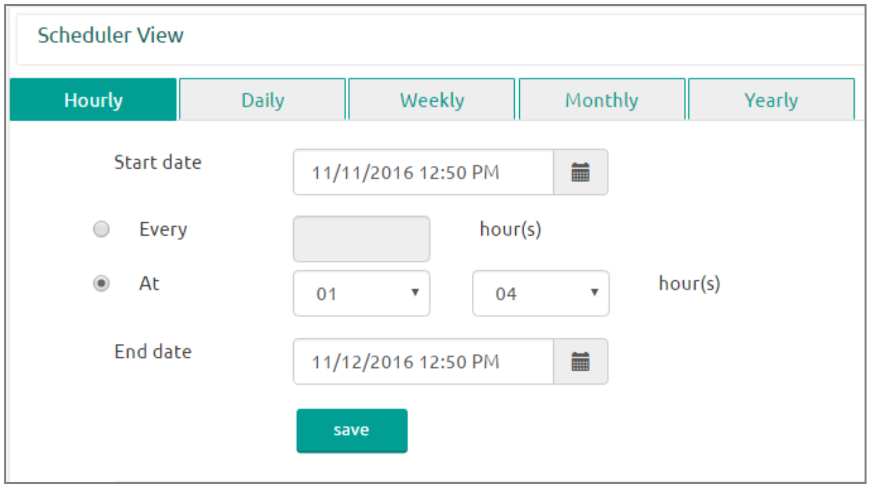


viii) Users will be directed to a new screen.

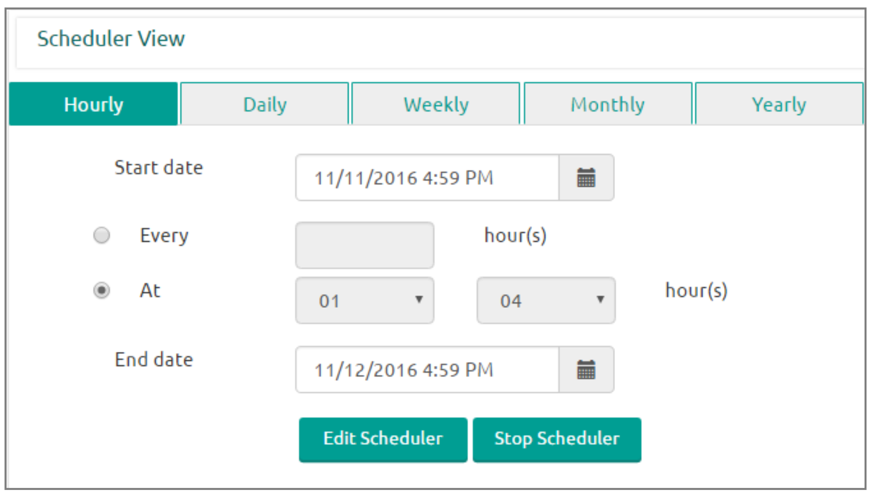
ix) Complete the following configurations:

a. Select a time range option
b. Enter start date
c. Select any one option to schedule refresh:
   - Every
   - At
d. Enter an end date

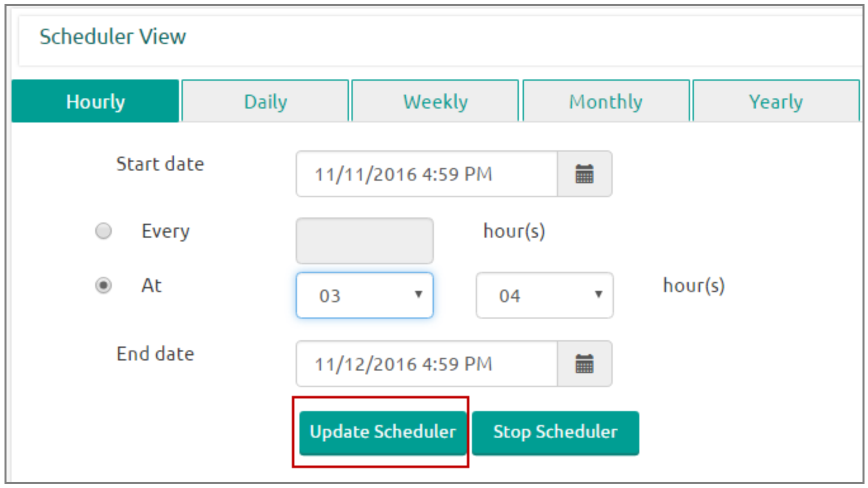
x) Click '**Save**'.



xi) If the scheduler is created successfully, the screen will display the '**Edit Scheduler**' and '**Stop Scheduler**' options.

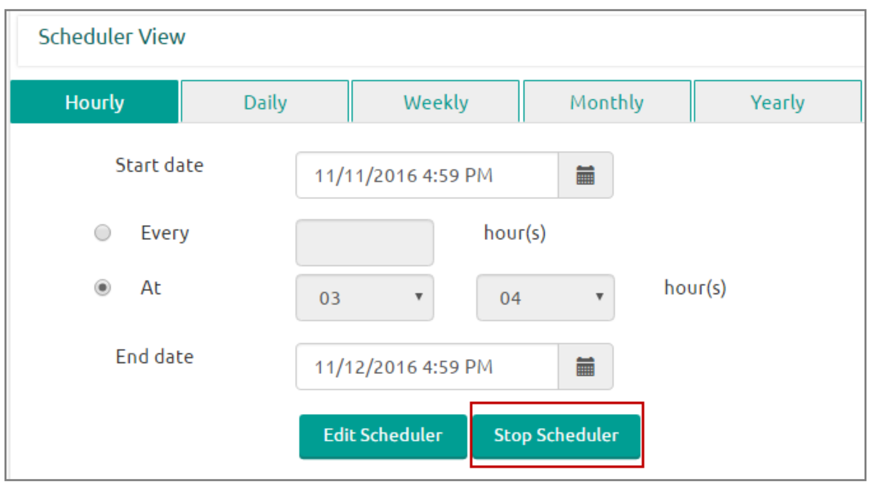


- **Editing the Scheduler:**
  - Click '**Edit Scheduler**' on the '**Create Scheduler'** screen.
  - Edit information as needed.
  - Click '**Update Scheduler.**'

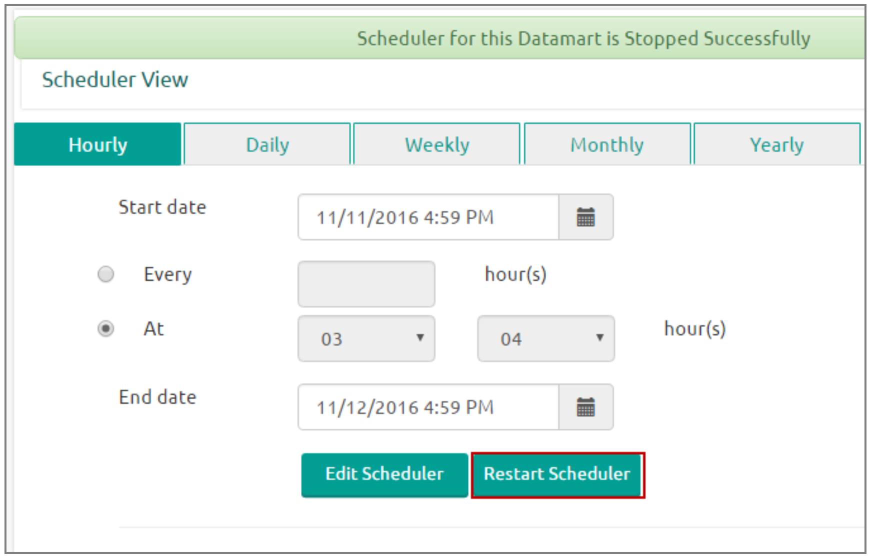


- The scheduler information will be updated successfully.

- **Stopping a Scheduler:**
    - Click ‘**Stop Scheduler**’ on the ‘**Scheduler View**’ screen.
    - The scheduler will be stopped.



- Click ‘**Restart Scheduler**’ to resume the scheduler.



8.3.3. Other Options

i. Update Now:

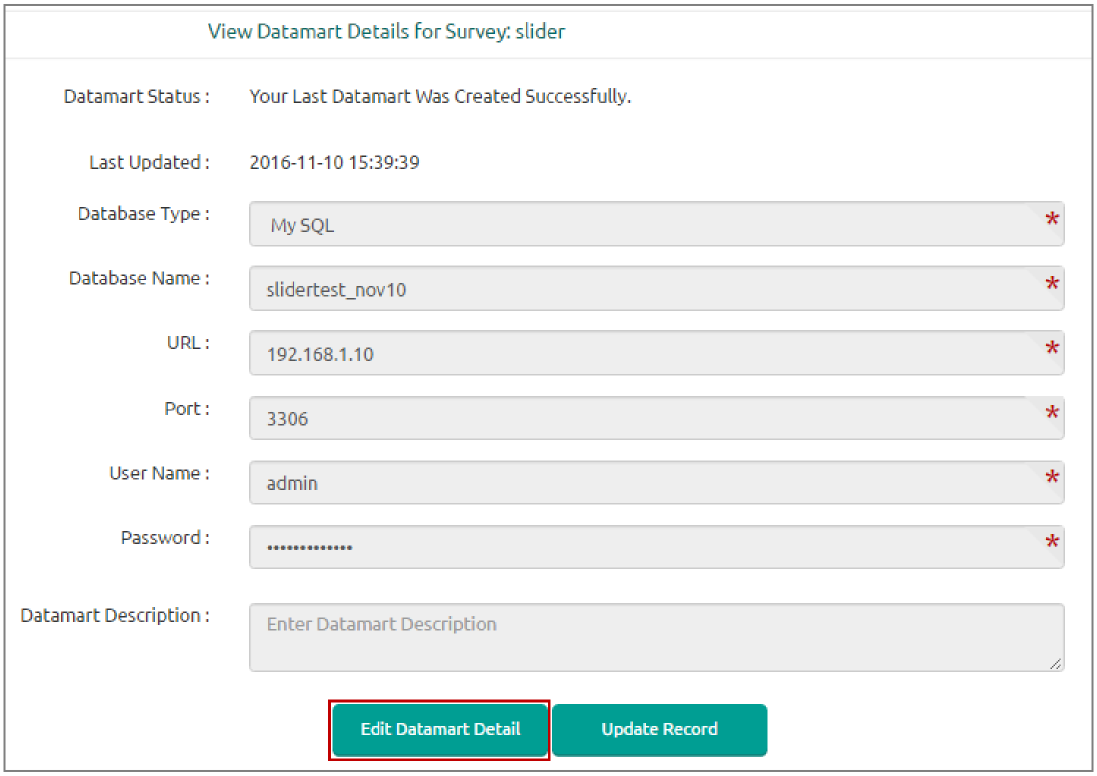
1. Click '**Update Now**' on the '**Manage DataMart for Your Survey**' screen.
2. A window will be displayed, allowing the user to update the scheduler manually.
3. Click '**Update Now**'.

4. The scheduler will be updated.

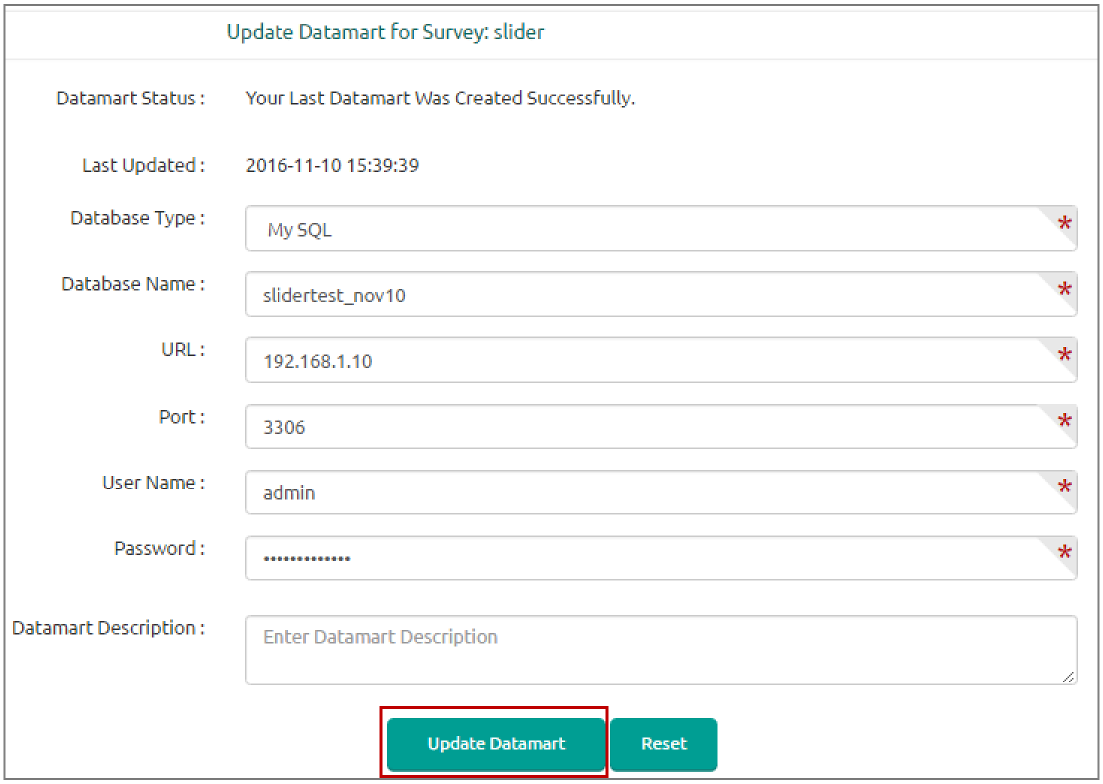
ii. Edit DataMart:

Users can edit or reset DataMart information by using the Edit DataMart icon.

1. Click '**Edit DataMart**'
2. DataMart details for the selected survey will be displayed.
3. Click '**Edit DataMart Detail**'.



4. Edit information for the DataMart as needed.
5. Click '**Update DataMart**'.



6. DataMart details will be updated successfully.

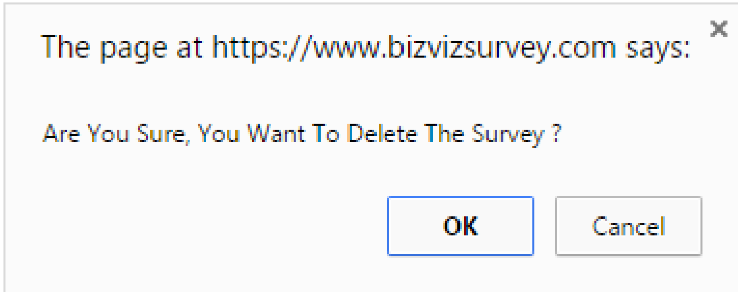
Notes:

a. Changes to DataMart details may require the DataMart to be recreated at the given IP address.
b. To update a record in DataMart, use ‘**Update Record**’ button.

c. To get the latest status of DataMart, use the ‘**Refresh**’ button

8.4. Deleting a Survey

i) Navigate to the survey home page.
ii) Click on the ‘**Settings**’ option provided next to a Survey Name.
iii) A drop-down menu will be displayed.
iv) Select ‘**Delete Survey’** option from the drop-down menu.
v) A new window will pop-up to confirm the deletion.
vi) Click ‘**OK**’.



vii) The selected survey will be deleted.

8.5. Copying a Survey

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

i) Navigate to the Survey home page.
ii) Click the '**Settings**' icon.
iii) A drop-down menu will be displayed.
iv) Select '**Copy Survey**' option from the drop-down menu.
v) A new survey will be added to the survey list.
vi) Name of the copied survey will be displayed 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**'.

Note:

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

8.6. Survey Summary

This feature displays design and response summaries for the selected survey.

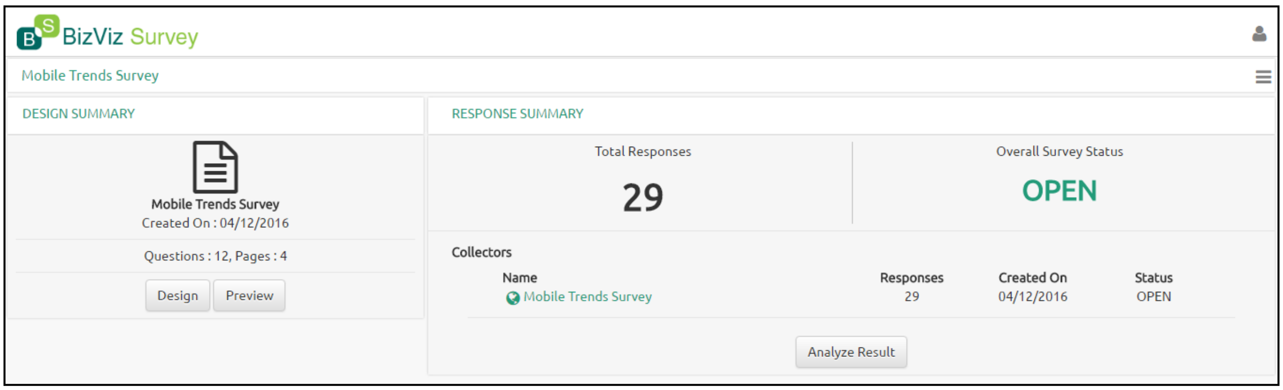
vii) Navigate to the Survey home page.

viii) Click the '**Settings**' icon.

ix) A drop-down menu will be displayed.

x) Select '**Survey Summary**' option from the drop-down menu.

xi) A new page will be displayed containing the detailed survey summary.



Note: Users are provided with options to design, preview, and analyze a survey on the '**Survey Summary**' page.

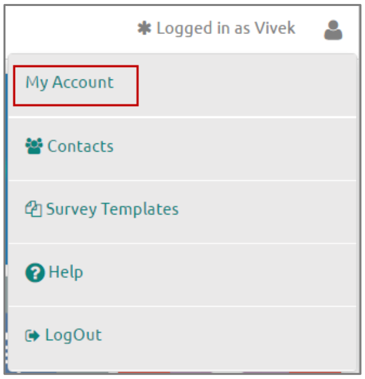
9. My Account

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

i) Click icon on the top right corner.

ii) A context menu opens.

iii) Select '**My Account**'.



iv) Users will be redirected to a new screen.

v) The following options will be displayed on the screen:

a. Account Summary

b. Billing Details

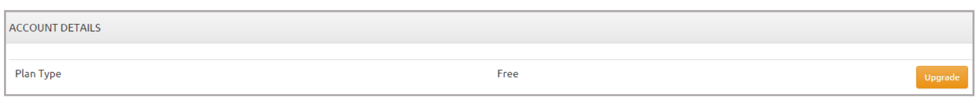
1. Account Summary

‘**Account Summary**’ contains 3 sections. All the Sections are described over here:

i) Account Details

i) The current ‘**Plan Type**’ will be displayed (user specific).

ii) Click ‘**Upgrade**’.



iii) Clicking ‘**Upgrade**’ will redirect the user to a new screen.

iv) Select a ‘**Plan Type’.**

v) Click ‘**Upgrade**’ to access the Billing Details .

vi) Fill the following information:

- Enter Address
- Enter Postal Code
- Enter City
- Enter Country
- Enter Phone Number
- Enter Organization Name

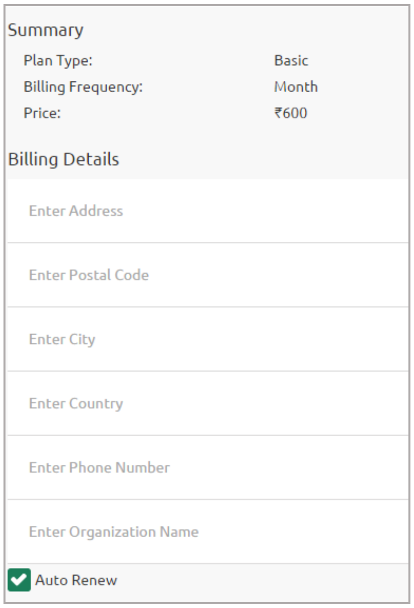
vii) Select ‘**Auto Renew**’ option (if desired).

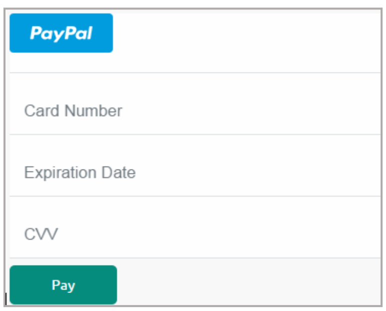
viii) Enter Card details:

- Card Number
- Expiration Date

- CVV

ix) Click ‘**Pay**’ to complete the payment procedure.



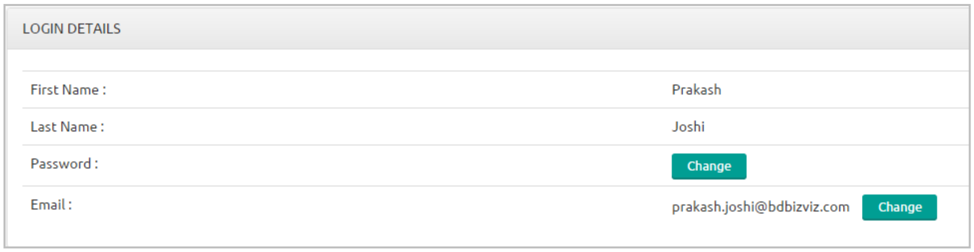


Note: Platinum account users will not be provided with Upgrade option as it is the highest account type.

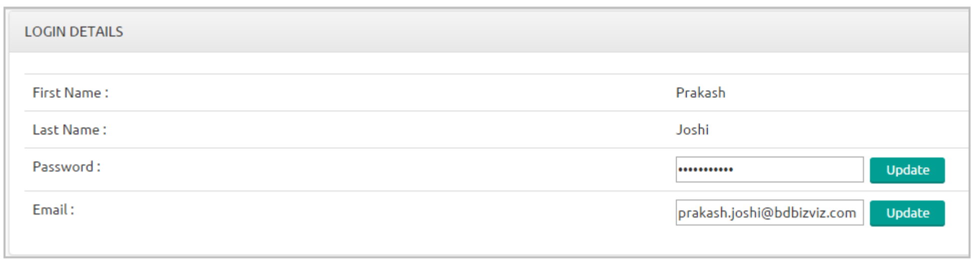
ii) Login Details: Changing Password and Email Address

The following user details are covered under this section:

- First Name
- Last Name
- Password (User password is not displayed)
- Email



i) Click ‘**Change**’ button provided for password.
ii) A new box will be displayed.
iii) Enter new password in the box and click on ‘**Update**’.
iv) Click ‘**Change**’ button provided for email.
v) A new box will be displayed.
vi) Enter new/modified email id in the box and click on ‘**Update**’.



iii) Other Details

This section displays user specific personal information. (As displayed below):

2. Billing Details

Two aspects are covered under this section:

i) Billing Profile

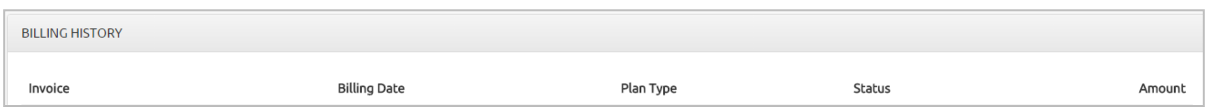
a. **Account Type:** Current account type in use by the user

b. **Auto-renew:** Indicates whether auto-renewal for the chosen account type is **Disabled** or **Enabled**

ii) Billing History

A detailed summary of the previous billing details will be displayed as shown in the following image:

- Invoice
- Billing Date
- Plan Type
- Status
- Amount

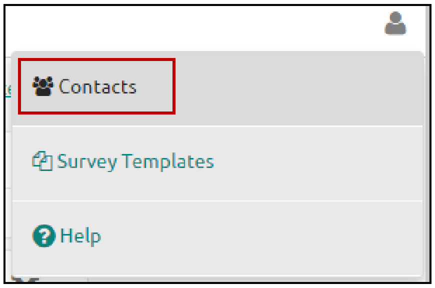


10. Contacts

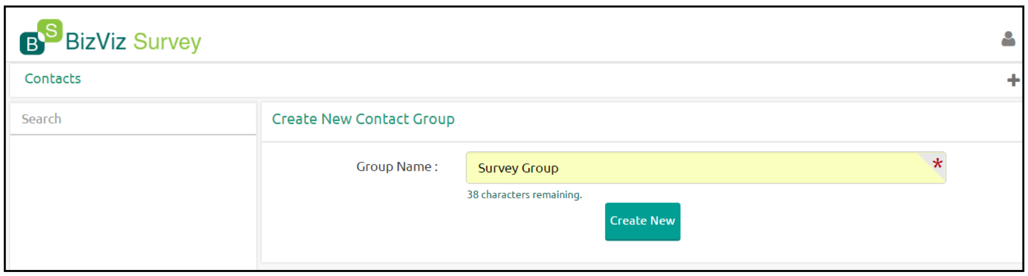
Contacts and contact groups are created to maintain an address book for sharing a survey.

10.1. Creating a Contact Group

i) Click icon on the top right corner.
ii) A context menu opens.
iii) Select '**Contact**' from the context menu.



iv) Users will be redirected on the '**Create New Contact Group**' page.
v) Enter '**Group Name**' in the given field.
vi) Click '**Create New**'.



vii) A new contact group will be created and added on the left side of the screen pane.

Note: Click '**Add**' button ✚ to add multiple contact groups.

10.2. Creating New Contacts

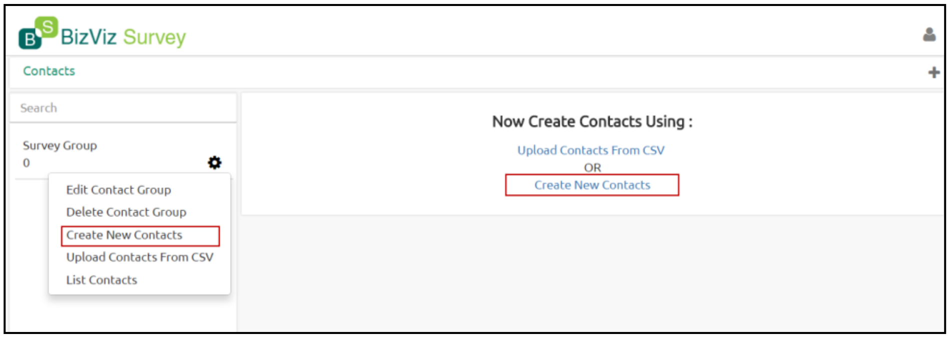
Users can add new contacts into a contact group via the following ways:

10.2.1. Creating New Contacts (Manually)

i) Select '**Create New Contacts**' option that has been displayed by default after creating a contact group.

Or

Select '**Create New Contacts**' option from the Settings drop-down menu provided next to the Contact Name.



ii) Users will be redirected on the '**Create Contacts**' panel.

iii) Enter the following information manually:

- First Name
- Last Name
- Email
- Mobile No.

iv) Select '**Update**' from the drop-down menu provided at the top right side of the screen.

v) Click '**Create**'.

vi) Contact will be created and added to the Contacts List.

10.2.2. Uploading Contacts from CSV File

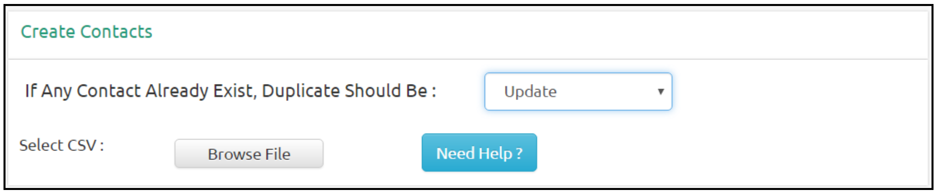
i) Select '**Upload Contacts from CSV'** option that has been displayed by default after creating a contact group.

OR

Select '**Upload Contacts from CSV**' option from the Settings ⚙ drop-down menu provided next to the Contact Name.

ii) Users will be redirected on the '**Create Contacts**' panel.

iii) Click '**Browse File**'.

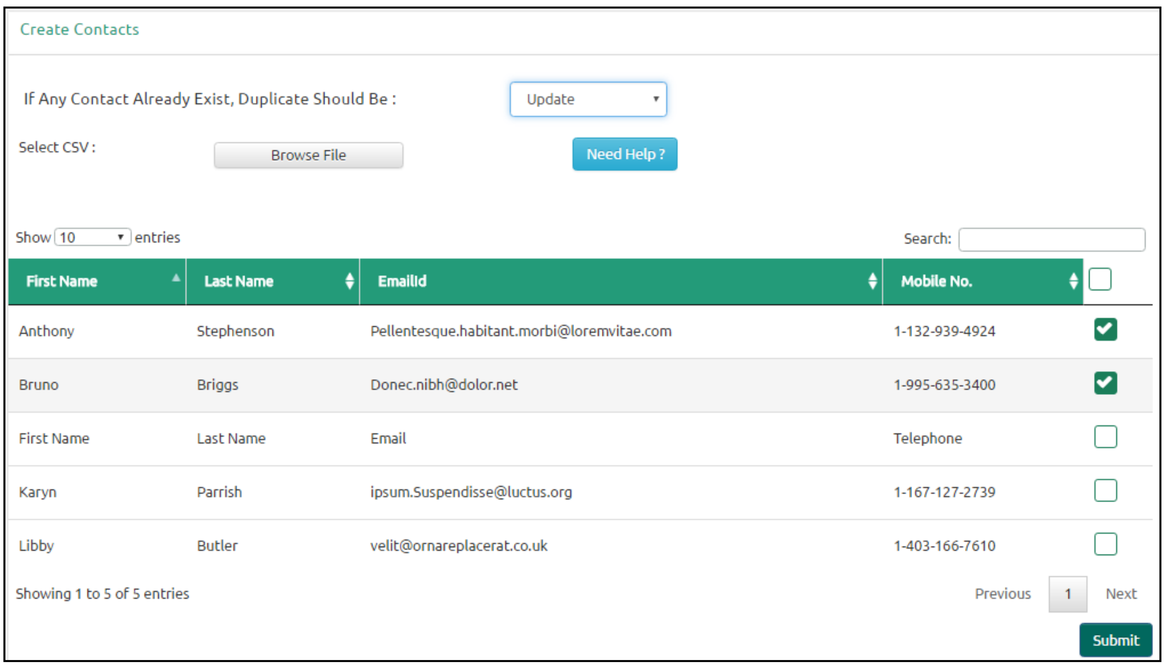


iv) Contacts details will be displayed on the screen from the CSV file.

v) Select ‘**Update**’.

vi) Select contact details by tick marking the boxes.

vii) Click ‘**Submit**’.



viii) The selected contacts will be uploaded to the contact list.

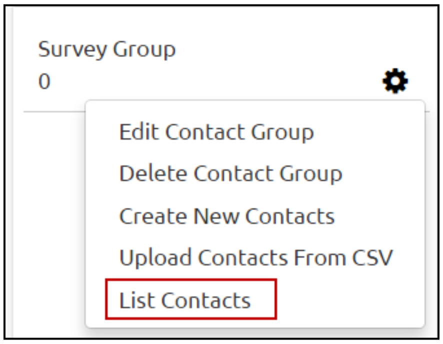
Note: Users can select all the contacts from the list by tick marking the box provided next to the heading Mobile No.

10.3. Listing a Contact

i) Click ‘**Settings**’ on the contacts page.

ii) A context menu will open.

iii) Select ‘**List Contacts**’.



iv) A new page will be opened with the ‘**Contact List**’ details of all the created contacts.


Survey Group : Contacts List

Show 10 entries   Search:

First Name	Last Name	EmailId	Mobile No.	Action
Anthony	Stephenson	Pellentesque.habitant.morbi@loremvitae.com	1-132-939-4924	
Bruno	Briggs	Donec.nibh@dolor.net	1-995-635-3400	

Showing 1 to 2 of 2 entries   Previous 1 Next

Note:

a. Click ‘Delete’ icon to remove a contact from the contact list.

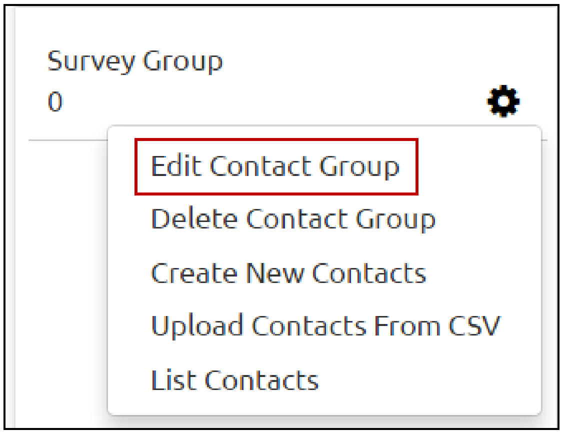
b. Click ‘Edit’ icon to edit contact details for the selected contact.

10.4. Editing a Contact Group

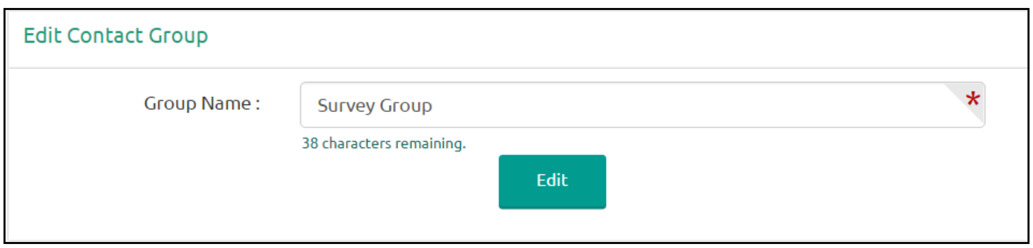
i) Click ‘**Settings**’ on the contacts page.

ii) A context menu will open.

iii) Select ‘**Edit Contact Group**’.



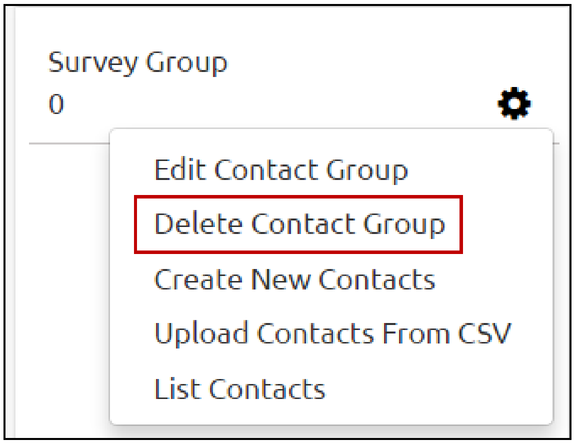
iv) Users will be redirected to edit the contact group details.
v) Edit ‘**Group Name**’ (if desired).
vi) Click on ‘**Edit**’.



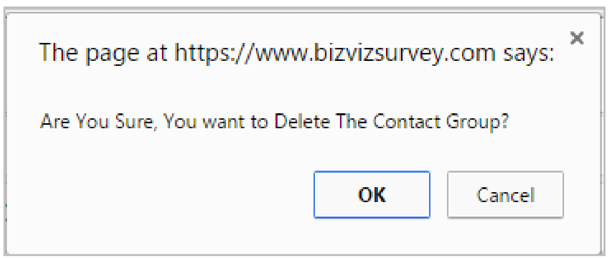
vii) The desired information will be edited.

10.5. Deleting a Contact Group

i) Click ‘**Settings**’ on the contacts page.
ii) A context menu will open.
iii) Select ‘**Delete Contact Group**’.



iv) A pop-up window will appear to confirm the deletion.
v) Click ‘**OK**’.

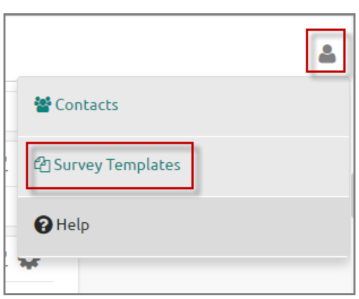


vi) The selected contact group will be deleted.

11. Survey Template

This option allows users to reuse surveys. Users can even modify the survey questions, if needed.

i) Click icon on the top right corner.
ii) A context menu opens.
iii) Select ‘**Survey Templates**’.



iv) The user will be redirected to the '**Survey Templates**' page.

v) Click '**Preview**' to see a preview of the survey template.
vi) Click '**Use This Survey**' to create the selected survey in the current user account.

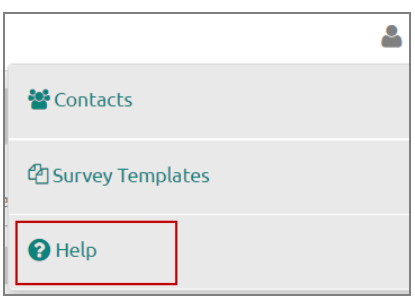
Note: By clicking '**Use This Survey**', users will be redirected to edit or modify the survey questions.

12. Help

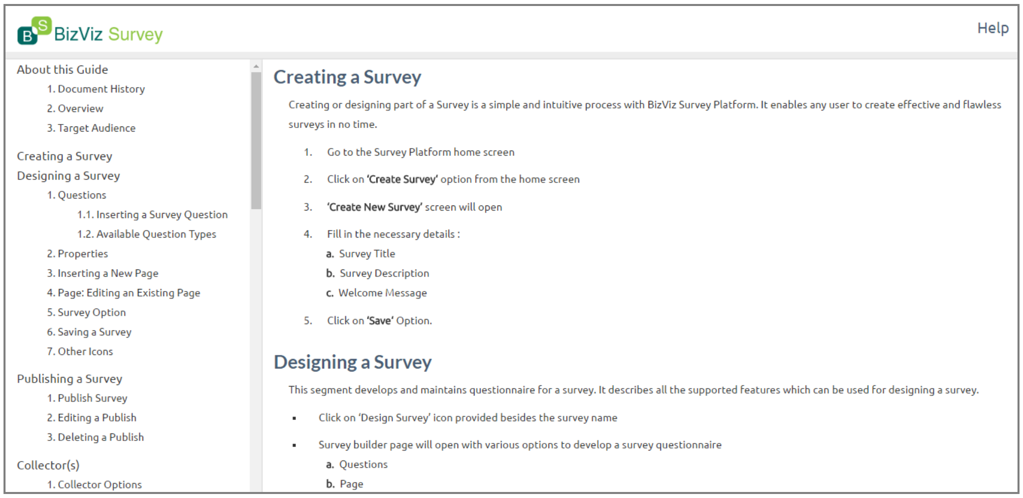
i) Help Section

Users can access the help content using this option to understand features and functionalities of the Survey module.

i) Click the icon on the top right corner.
ii) A context menu opens.
iii) Select '**Help**'.

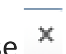


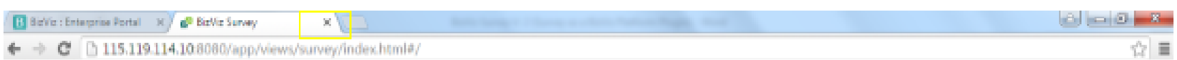
iv) Users will be redirected to the help document.



13. Logging Out

i) Survey app opens in a separate window while selecting '**Survey**' option from the BizViz Platform.

ii) To '**Log Out**' from the application or close it, the user can click on close  option from the Survey Window.



iii) Closing the Survey window will redirect the user back to the **BizViz Platform home page**.