

# **User Guide**

## Survey R-4.4



<u> </u>			<b>L</b> -
Со	nτ	en	ITS
~ ~			

1.	Abo	ut this Guide	5
	1.1.	Document History	5
	1.2.	Overview	5
	1.3.	Target Audience	5
2.	Intro	oducing the BDB Survey	5
	2.1.	Introduction to the BDB Survey	5
	2.2.	Supported Web Browsers	5
3.	Gett	ing Started with the BDB Survey	6
	3.1.	1. Forgot Password Option	8
	3.1.	2. Force Login	9
4.	Crea	ating a Survey	.10
	4.1.	Force Login	.11
	4.2.	Creating a Survey using Scratch	.12
	4.3.	Creating a Survey using Template	.13
5.	Desi	gning a Survey	.15
	5.1.	Questions	.15
	5.2.	Properties	.22
	5.3.	Inserting a New Page	.25
	5.4.	Page: Editing an Existing Page	.26
	5.5.	Survey Option	.26
	5.6.	Saving a Survey	.28
6.	Pub	lishing a Survey	.29
	6.1.	Providing 'Publish Survey' Information	.29
	6.2.	Collector(s): Accessing Collector Options	.30
	6.3.	Creating a Web Link Collector	.31
	6.4.	Creating an Email Collector	.32
	6.4.1.	Adding Recipients for Email Collector	.32
	6.5.	Editing Collector(s)	.35
	6.6.	Deleting Collector(s)	.37
7.	Ana	lyzing Result for a Survey	.37
	7.1.	BizViz Analysis	.38
	7.2.	Benchmark Analysis	.38
	7.3.	Individual Response	.38



	7.4.	All R	esponses:	.39
	7.5.	Page	Bounce	.40
	7.6.	Crea	ting a New View in the Analyze Result	.41
	7.7.	Filte	r Rule in the Analyze Result	.42
	7.7.	1.	Creating a Filter	.42
	7.7.	2.	Managing a Created Filter	.43
	7.7.	3.	Filter Logic	.43
	7.7.	.4.	Filter Types	.43
	7.8.	Shov	v/Hide Rules for Page/Questions	.58
8.	Mo	re Opt	tions	.59
	8.1.	Prev	iew Survey	.59
	8.2.	Bend	hmark	.60
	8.2.	1.	Editing a Benchmark	.60
	8.2.	2.	Adding Goal to a Benchmark	.61
	8.3.	Editi	ng a Benchmark Goal	.62
	8.3.	1.	Deleting a Benchmark Goal	.62
	8.3.	2.	Adding Questions to a Benchmark Goal	.63
	8.3.	3.	Viewing a Goal Question	.64
	8.3.	4.	Deleting a Benchmark Goal Question	.64
	8.4.	Man	aging Datamart	.64
	8.4.	1.	Creating a Datamart	.64
	8.4.	2.	Implementing Scheduler in the DataMart Section	.65
	8.4.	3.	Other Options	.68
	8.5.	Dele	ting a Survey	.70
	8.6.	Сору	/ing a Survey	.71
	8.7.	Surv	ey Summary	.71
9.	Con	tacts.		.72
	9.1.	Crea	ting a Contact Group	.72
	9.2.	Crea	ting New Contacts	.73
	9.2.	1.	Creating New Contacts (Manually)	.73
	9.2.	2.	Uploading Contacts from CSV File	.73
	9.3.	Listir	ng a Contact	.74
	9.4.	Editi	ng a Contact Group	.75
	9.5.	Dele	ting a Contact Group	.76
1(	D. S	urvey	Template	.76

## BBB®

11.	lelp77	,
12.	igning Out78	}
12.1	Closing the BDB Survey	;
12.2	Signing Out	;



## **1. About this Guide**

#### **1.1.** Document History

Product Version	Date (Release date)	Description
Survey 1.0	June 9 <sup>th</sup> , 2015	First Release of the document
Survey 2.0	February 18 <sup>th</sup> , 2016	Updated document
Survey 2.1	May 11 <sup>th</sup> , 2016	Updated document
Survey 2.5	November 9 <sup>th</sup> , 2016	Updated document
Survey 3.0	August 31 <sup>st</sup> , 2017	Updated document
Survey 3.2	February 2 <sup>nd,</sup> 2018	Updated document
Survey 3.5	April 15 <sup>th</sup> , 2018	Updated document
Survey 3.6	August 20 <sup>th</sup> , 2018	Updated document
Survey 3.7	October 10 <sup>th</sup> , 2018	Updated document
Survey 3.8	December 1 <sup>st</sup> , 2018	Updated document
Survey 4.0	December 31 <sup>st</sup> , 2018	Updated document
Survey 4.2	March 25 <sup>th</sup> , 2019	Updated document
Survey 4.3	April 24 <sup>th</sup> , 2019	Updated document
Survey 4.4	June 7 <sup>th</sup> , 2019	Updated document

Note: The Product Version reflects the BDB Platform release version. The guide has been updated on the regular basis to reflect the general UI changes for the Survey Plugin as well.

#### 1.2. Overview

This guide covers how to:

- Access the BDB Survey Plugin
- Design a Survey
- Publish a Survey
- Apply Analytics to the Survey

#### 1.3. Target Audience

This guide aims at business professionals, data scientists, and management executives who use the BDB Survey plugin to interact with business intelligence data and collect responses to be analyzed.

## **2.** Introducing the BDB Survey

#### 2.1. Introduction to the BDB Survey

BDB 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 a useful 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 BDB Survey with BDB Analytics makes it a robust analytic tool extracting hidden insights out of the collected data.

#### 2.2. Supported Web Browsers

The BDB Platform is a web browser-based application. The users can run the BDB Platform and its



various plugins on the below given versions of the browsers:

Mozilla Firefox/ Firefox ESR	Latest Version
Microsoft Internet Explorer	11
Microsoft Edge	Latest Version
Apple Safari	10
Google Chrome	Latest Version (recommended web browser)

• BDB Survey can be accessed through a Web browser on Desktop, Tablet, and Mobile Phone.

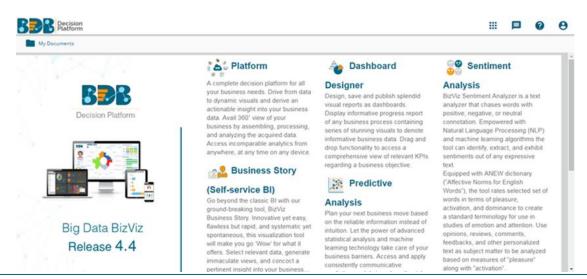
## **3. Getting Started with the BDB Survey**

BDB Survey is a plugin application provided under the BDB Platform.

- i) Open BDB Enterprise Platform Link: https://app.bdb.ai
- ii) Enter your credentials to Login.
- iii) Click the '**Continue**' option.



iv) The Platform homepage opens.





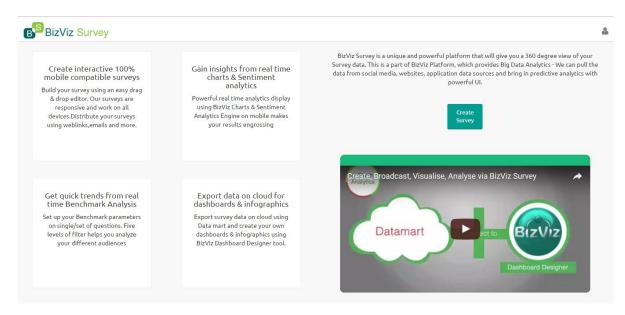


Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

- v) Click the 'Apps' menu III to display a list of all the available plugins.
- vi) Select the 'Survey' plugin from the list.



vii) Survey homepage opens in a new window.





#### **3.1.** Forgot Password Option

Users are provided with a choice to change the password on the Login page of the platform.

- i) Navigate to the Login page.
- ii) Click 'Forgot your password?' option.

Decision Platform		
Email *		
Password *		
Auth Type Enterprise	•	
	Forgot your password ?	
Continue		

Copyright © 2015-2019 BDB (BizViz Technologies Pvt Ltd)

- iii) A new window opens.
- iv) Provide the email id that is registered with BDB to send the reset password link.
- v) Click the '**Continue**' option.



Having trouble signing in? To reset your password, enter address you use to sign in to B can be your email address asso	izViz. This
your account. Email *	
admin@bdb.ai	
	<u>Sign in</u>
Continue	

Copyright © 2015-2019 BDB (BizViz Technologies Pvt Ltd)



vi) Users may be redirected to select a space in case of multiple spaces under one server link( They need to select a space and click the 'Continue' option once again). If users do not have multiple spaces then, a message appears to notify the user that about the password reset link (The users receive the reset link via their registered email).

Password reset Link has been sent to your mail.

- vii) Click the link from your registered email.
- viii) Users get redirected to the 'Reset Password' page to set a new password.
- ix) Set a new password.
- x) Confirm the newly set password.
- xi) Click the '**Continue**' option.



Copyright © 2015-2019 BDB (BizViz Technologies Pvt Ltd)

xii) The password for the selected BDB account gets reset.

#### 3.2. Force Login

The 'Force Login' functionality has been introduced to control the number of active sessions up to three. The users can access only 3 sessions at a time when they try to access 4<sup>th</sup> session a warning message displays to inform that the user has consumed the permitted sessions and a click on the 'Force Login' would kill all those active sessions.

- i) Navigate to the BDB Platform Login page.
- ii) Enter the valid credentials to log in.
- iii) Click the 'Continue' option.



Image: Service	Apps 🙀 VUJAA: platform 🗋 BDB: Decision Platfor 🐞 BDB: Decision Platfor	latfor	or Q 🖄 🕝 😝
← Servertess Data Pipeline → Continue	BDB SArvey BDB Sarvey The I help AFy Data Lake Data Lake	R Governed Dashboard Coverned Dashboard Coverned Dashboard Coverned Dashboard Coverned Dashboard Coverned Dashboard Coverned Dashboard Coverned Dashboard Coverned Dashboard	2 Emai* admin.user@bdb.ai
Persona's	Big Data Data Wangling Self Se	teriore bell Service Bl Dashboard	Auth Type
e Solution Architect IT CXOs CDS Business Users End Users	Big Data Data Layer c	Self Service BI Dachboard Self Service BI Dachboard Mobility	Auth Type Enterprise

- iv) The user gets the following message if the user already consumes the permitted active sessions (3 sessions at a time).
  - ← → C Secure | https://app.bdbizviz.com/h on Q 🕸 📀 🗄 Welcome to BDB Decision platform Big Data Pipeline Framework Dashboard Designer Decision Platform ETL (Self-Service Data Preparation) Permitted sessions are already consumed, Do you want to force login? It will kill all the active sessions. Geospatial Analysis (Location Intelligence) Predictive and Prescriptive Workbench Play (Beta Release) Cancel Self-Service BI (Business Story) Social Media Browser Sentiment Analysis Survey Copyright @ 2015-2019 BDB (BizViz Technologies Pvt Ltd)
- v) Click the 'Force Login' option.

vi) A warning message appears that the currently active sessions get killed for the user and the user has redirected to the log in a page of the BDB Platform.

Note: The user can successfully login to the BDB Platform after selecting the 'Force Login' option to log in the platform.

## 4. Creating a Survey

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

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

www.bdb.ai



i) Navigate to the Survey home page.

#### ii) Click the '**Create Survey**' option.

BizViz Survey	٩
Search Survey	Create Survey
Employee Satisfaction Survey	C 🕰 🗠 🔅
Created On: 12/15/2016 Completed Responses: 0	

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

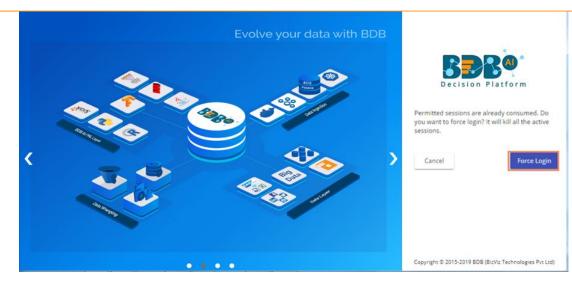
	Create New Survey From Scratch	Create New Survey From Template
Survey Title :	Enter Survey Title	Customer Satisfaction
rvey Description :	50 characters remaining.	Workplace
ivey bescription.	Enter Survey Description	vioripace
	1000 characters remaining.	
elcome Message :		
	$\blacksquare \blacksquare \equiv \Omega$ 🔀 🖻 Source	
	B I <del>S</del>   I <sub>x</sub>   I= :=   -   = ??	
	Styles - Format - ?	
	4	

#### 4.1. Force Login

The 'Force Login' functionality controls the count of active sessions up to three at a time.

- i) Users can access only three sessions at a time using different devices
- ii) A warning message appears while accessing the 4<sup>th</sup> session to notify that the user has consumed all the permitted sessions and a click on the '**Force Login**' option would kill all those active sessions.





#### 4.2. Creating a Survey using Scratch

- i) Fill in the following information:
  - a. Survey Title
  - b. Survey Description
  - c. Welcome Message
- ii) Click 'Save.'

	Create New Survey
Survey Title :	Mobile Trends Survey
Survey Description :	Mobile Trends Survey
Welcome Message :	Image: Construction     Image: Construct
	4
	Save Cancel

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



Questions Page Survey Properties Theme	🖺 Save 🛛 All Pages 🔻	v <sup>2</sup> &
Single Answer		+ Insert Page
Multiple Answer	Moh	ile Trend Survey
Single Answer Picture	Mob	
Multiple Answer Picture		Page 1: Default Page
Yes/No Yes/No	No Question has been added in this page	
Matrix-Single Answer	No Question has been added in this page	
Matrix-Multiple Answer		
Rating Scale		
1 Numerical Textbox		
a b c Textbox		
Comment		
Multiple Textbox		
Contact Details		
Dropdown		

#### 4.3. 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

Cus	tomer Satisfaction		
Product Customer Satisfaction Surv Pages : 1 , Question : 10	vey	Preview	Use This Template
Customer Service Survey Pages : 2 , Question : 15		Preview	Use This Template

Note:

- a. By clicking on '**Preview**' option users will be redirected to the preview page of the survey.
- b. By clicking the 'Use This Template' option users will be redirected to the following page:



B <sup>S</sup> BizViz Survey		۵
Questions Page Survey Properties Theme	Save All Pages *	$\omega^{s}\equiv$
Single Answer	+ Insert Page	
Multiple Answer	Product Customer Satisfaction Survey	
Single Answer Picture	Product Customer Satisfaction Survey	
Multiple Answer Picture	Page 1:	Customer Page
Yes/No Yes/No	Overall, I am very satisfied with the way of the company performed on this product.	m
Matrix-Single Answer	Strongly Agree Agree Neither Agree Nor Disagree Strongly Disagree	
Matrix-Multiple Answer		
Rating Scale		
Numerical Textbox	Please indicate your level of agreement with each of the following statements: Strongly Agree Agree Disagree Strongly Disagree	Û
Textbox	Company service representatives are well trained	
Comment	Company service representatives are well supervised	
Multiple Textbox	Service representatives adhere to professional standards of	
Contact Details	Service representatives act in my best interest	
Dropdown	Overall, I am satisfied with the service representatives	
Dropdown-Multiple Selection		
Multiple Dropdown-Same Option	How long have you been a customer of our company?	ū
Multiple Dropdown-Different Option	◯ This is my first purchase ◯ Less than six months ◯ Six months to a year ◯ 1-2 years ◯ 3 or more years	

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

BS BizViz Survey	
Search Survey	Create Survey
Product Customer Satisfaction Survey 2	C 🛆 🗠 🔅
Created On: 12/22/2016 Completed Responses: 0	
Product Customer Satisfaction Survey	ି 🌢 🗠 🔅
Created On : 12/22/2016 Completed Responses : 0	

- d. A new Survey created via both the options mentioned above gets added to the Survey List.
- Other Related Options

lcons	Name	Description		
Ø	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		
<b>*</b>	More Options	Displays a list of options to be applied to a survey:		
-		1. Preview Survey		
		2. Benchmark		
		3. Manage Datamart		
		4. Delete Survey		
		5. Copy Survey		
		6. Survey Summary		



### 5. Designing a Survey

Users get various options on the header bar of the survey builder to create and modify 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 the survey questionnaire:
  - a. Questions
  - b. Page
  - c. Survey
  - d. Properties
  - e. Save
  - f. Insert Page



#### 5.1. Questions

The survey is a carefully created questionnaire. The 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.

B <sup>S</sup> BizViz Survey		ۿ
Questions Page Survey Properties Theme	🖺 Save 🛛 All Pages 🔹	~* <i>&amp;</i>
Single Answer	+ Insert Pa	age
Multiple Answer	Sample Su	<b>B</b> (0)(
Single Answer Picture	Sample Su	ivey
Multiple Answer Picture		Page 1: Default Page
Yes/No		
Matrix-Single Answer	No Question has been added in this page	
Matrix-Multiple Answer		
Rating Scale		
1 Numerical Textbox		
a b c Textbox		
Comment		
Multiple Textbox		
Contact Details		
Dropdown		
Dropdown-Multiple Selection		

- 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.



Questions Page Survey Properties	🖺 Save 🕇 Insert Page 🛛 All Pages	•		2 <sup>74</sup> 6	8
Question Type MATRIX_TYPE_SINGLE_ANSWER_PER_RC				Page 1: Pag	ge f
Question Text Matrix Type Single Answer	Multiple Choice Single Answer Option 1 Option 2			c	ĭ
Options/Choices					
Columns Add	Matrix Type Single Answer	Column 1	Column 2	Column 3	ĭ
Column 2	Row 1	0	0	0	
Column 3	Row 2	0	0	0	
Rows Add	Row 3	0	0	0	
Row 1					
Row 2					

#### Available Question Types

BDB Survey provides with various question types to build a survey.

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

How long have you been u	ising your current	cell phone?		ô
O Less than a year	O 1-2 years	O 3-4 years	O More than 5 years	

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

Select all Mobile	Brands you have used so	far				â
Apple	Motorola(Google)	Samsung	Xiaomi	Nokia (Windows)	Others	

• **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.



Select all the mobile device brand o	wned by your family.		Ū.
Apple	Samsung	Huawei	

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

Are you a sma	artphone user? ★	ŵ	
<b>V</b> es	O No		

• 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 the 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	0	0	0	
Mother	0	0	0	
Brother	0	0	0	
Sister	0	0	0	

• 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 the 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. The 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	0	0	0		
Screen Size	0	0	0		
OS Features	0	0	0		
Brand	0	0	0		



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

Howmany mobiles are owned by your family?	1
Answer Here	

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

Please enter your favorite mobile device brand.	Û
Answer Here	

• **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 wording and length of responses. Collected responses can then be viewed separately or through some text analysis tools. Questions falling under this type are often not mandatory to respond.

Please provide your feedback on your current mobile phone. What else do you expect from your smart phone? 🖈	Ô
Answer Here	

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

Rate how the following factors influence your mobile device Favourite	pure
Answer Here	
Second Favourite	
Answer Here	
Third Favourite	
Answer Here	

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

Fill your contact details in the below given fields: Name
Name
Company
Company
Address
Address
Address2
Address2
City / Town
City/Town
State / Province
State/Province



ZIP / Postal Code	
ZIP/Postal Code	
Country	
Country	
Email Address	
Email Address	
Phone Number	
Phone Number	

 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).

Select your favourite mobile device brand from the drop down menu.			
Mobile Brands			

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

Which is your	favourite mobile device brand?	Û
Apple Samsung Huawei Xiaomi		

• 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.

Select the following:		Û
Best UI	Select Option 🔻	
Worst UI	Select Option 🔻	

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

Select the following:		ŵ
Choose an option using dropdown menu	Mobile Brands 🔻	
Choose an option using dropdown menu	Television Brands 🔻	

• Matrix Dropdown-Same Option: Use this question type when you want respondents to select an 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.



Select the aspect of mobile device b	rand for each family member: Apple		Samsung		
Father	Select Options	•	Select Options	*	
Mother	Select Options	v	Select Options	Ŧ	
Son	Select Options	v	Select Options	v	
Daughter	Select Options	Ŧ	Select Options	Ŧ	

• Matrix Dropdown-Different Option: Use this question type when you want respondents to select an 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 the left side panel of the screen to insert options for the drop-down menu. (as shown below)

Question Type	
DROPDOWN	
Question Text	
	mobile device brand fro
Answers/Choices	
Mobile Brands	
Note: Blank means no hea will default selected	d value and first option
	d value and first option
will default selected	
will default selected Options	Add
will default selected Options Apple	Add Ô

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

Rank the following mobile brands:	
Apple	Select Rank
Samsung	Select Rank
Xiaomi	Select Rank 🔻

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

How likely is it that you would recommend our company to a friend or colleague?							Ô						
Not at all likely	0	1	2	3	4	5	6	7	8	9	10	Extremely likely	



Ŵ

• Slider: Use 'Slider' when you want respondents to give a specific score between selected Minimum and Maximum value. The value is 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 a digital signature through curser by holding the left click. Respondent can use left click of the cursor to provide a digital signature in the given space.

Please give your signature here:	C	Ô

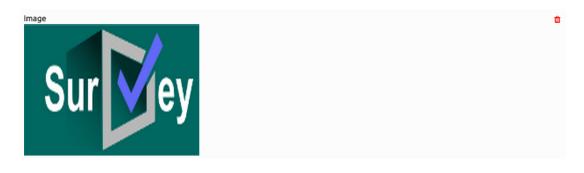
• File Upload: Use this option when you want respondents to upload a file. It supports PDF, document, Spread Sheet, and Image to be uploaded. File size should not exceed 500 KB. The user can upload the file from preview page or attempt page.

File Upload	
Choose File	No file chosen

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

Date Time	÷
02/04/2016 10:49 AM	

• **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 the size limit of 1 MB. This type of question can be associated with descriptive, text box, numerical text box, or comment to get a meaningful outcome.





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

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

**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 consists of various types of logic and question validation option.

There are two ways to access the '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:

Questions	Page	Survey	Properties						
Question 7	Question Type								
MULTIPI	MULTIPLECHOICE_SINGLEANSWER								
Question 1	Text								
Multiple	Choice Sing	le Answer							
Answers	/Choices								
			Add						
Option	n 1		Û						
Optior	n 2		Ê						
Orientation: Horizontal <b>T</b>									
Features	5								
Actions									

- i) **Question Type:** Question type is pre-selected
- ii) Question Text: Question Text can be inserted or modified
- iii) Options: Options can be added, modified, and deleted
- iv) Orientation: Horizontal or Vertical orientation can be selected from the drop-down menu
- v) **Features:** Features include various options to be applied to 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 BDB 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



Features					
Validation	Required •				
Validation Msg					
One Option is Required.					

v) All the Validated Questions will appear with the 'Validation' symbol 📩

Your Age Group ★	O 18-25 Years	O 26-35 Years	O 36-50 Years	O 51-65 Years	Above 65 Years	Û
Your Gender ★ ○ Female ○ N	Nale					Û
Which type of phone are						Û
How long have you been			ars			Û

#### • 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 the text limit is exceeded
  - d. **Comment Head**: Enter a heading for the inserted comment box

Show Comment Box						
Number of Rows(max:20):	2	\$				
Text Limit(max:1	200					
Text Limit Msg:	You	have ex	ceedec			
Comment Head:	Com	ment				

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



Your Gender ★	•
O Male O Female Comment Box :	
200 characters remaining	

#### • Use Logic

Logic aims to guide the respondents on a specific path for the successful completion of the survey. It also helps in getting the 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.

Vse L	.ogic	
	ıly 'Saved' que Skip logic)	stions can be used in
Options	Logic Type	
Male	Questic 🔻	Select 🕶
Female	Questic 🔻	Select 🕶
		<ul> <li>✓ Check All</li> <li>X Uncheck All</li> </ul>

BDB 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.

- 2. **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

Question Design	
Component Width (10-99):	99
Font Variant :	Normal 🔻
Font Style:	Normal 🔻
Font Weight:	Normal 🔹
Font Size:	Medium •
Option Font Color:	v
Radio Background :	•
Radio Border :	•

- 3. Actions: Users can move a question to any of the survey pages 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.

Actions	
Select Action	Move 🔻
Page	Page 1: Default Pa 🔻
	Done

#### 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

Questions Page Survey Properties	Save + Insert Page     All Pages	×* 🗞
Single Answer		Page 1: Page 🏛
Multiple Answer		
Matrix-Single Answer	A question has not yet been added to this page	
Matrix-Multiple Answer		
Rating Scale		
Multiple Textbox		
• • • Textbox		
Comment		
1 Numerical Textbox		
Descriptive		
image		
	and the second	
	+ Insert Page	

#### Note:

- a. The newly added page will open with a message that no question has yet been added to that page.
- b. The user can delete a page by clicking on the '**Page Delete**' option Page in provided at the top right side of each page.

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

- i) Select any one page from the 'All Pages' drop-down menu
- ii) Click on the 'Page' option from the Menu Row
- iii) Properties of the page will open on the left side of the screen
  - Page Title
  - Page Description
  - Page Logic
- iv) The user can modify all the properties of the selected page

uestions Page Survey Properties	😫 Save 🔶 🕂 Insert Page 3: Default Page 🔹	r 🗞
Page Title Default Page	Page 3: D	efault Page 🛍
Page Description Enter Page Description	Your Age Group ★         O Below 18 Years       18-25 Years       26-35 Years       36-50 Years       51-65 Years       Above 65 Years	Ċ
Page Logic Page skip logic enables you to redirect people to another page automatically and unconditionally. The skip is triggered when the respondent clicks the Next button. If you have any question skip logic on this page,	Your Gender ★ O Female O Male	â
the question logic will take precedence. Select Next Page: No Logic	Which type of phone are you using? * O Smart Phone O Normal Phone	ů
	How long have you been using a Smart Phone? ★ O Less than 1 year O 1-3 years O More than 5 years	â

#### 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 the '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.

uestions Page Survey Properties	😫 Save 🕈 Insert Page Page 3: Default Page 🔹	v" 🗞
Survey Logo	Page 3:	Default Page 🧯
Survey Title Copy_Of_Mobile Trends Survey * Survey Description	Your Age Group ★ O Below 18 Years O 18-25 Years O 26-35 Years O 36-50 Years O 51-65 Years O Above 65 Years	Û
Enter Survey Description	Your Gender ★ O Female O Male	Ô
$\begin{array}{c ccccccccccccccccccccccccccccccccccc$	Which type of phone are you using?★ O Smart Phone O Normal Phone	Đ
Styles • Font •	How long have you been using a Smart Phone?★ ◯ Less than 1 year ◯ 1-3 years ◯ More than 5 years	٥

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 from 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)



Questions Page Survey Properties	😫 Save 🕈 Insert Page Page 3: Default Page 🔹	28
Survey Title Copy_Of_Mobile Trends Survey *	Page 3: f	Default Page 🛍
Survey Description Enter Survey Description	Your Age Group ★ OBelow 18 Years 0 18-25 Years 26-35 Years 36-50 Years 51-65 Years Above 65 Years	Û
Welcome Message           ▲ ▲ ▲ ▲ ▲           ■ ▲ ▲ ▲           ■ ▲ ▲ ▲           ■ ▲ ▲           ■ ▲ ▲           ■ ▲           ■ ↓ ■ ▲	Your Gender *	۵
<u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u></u>	Which type of phone are you using? *	Û
Size  Welcome to the BizViz survey on Mobile Phone Trends. This short survey on your mobile phone usage should only take	How long have you been using a Smart Phone? <b>★</b> O Less than 1 year O 1-3 years O More than 5 years	۵
about 3 minutes of your time. This survey will give you 'Real Time Analytics' and 'Benchmark	Select all Mobile Brands you have used so far ★	٥

#### 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

rch Survey	Create Survey
sta sarrey	
Tobile Trend Survey	8 to 12 to
ested On: 06/20/2016 Complete Responses 10	
aa=/div==Script>alert(failed);=/script>==div=	3 <b>4</b> 12 <b>4</b>
ested On: 01(20)2016 Complete Responses 10 Not Completed Responses: 12	
etail	8 <b>4</b> 12 <b>4</b>
nited Chr.: 01/27/2310 Complete Responses (28	
IzViz BI Prospects Survey	8 to 12 to
ubed On: 01/10(2016 Complete Responses 10	
VT Customer Feedback	8 to 12 to
ested On: 01/08/2016 Complete Responses: 0	

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

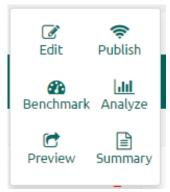
#### • Other Related Options:

• **'Full Screen'** icon displays the survey questions in full screen (as shown in the following image):



🖺 Save All Pages 🔻					بملا
	+ Insert Page				
Product Cust	comer Satisfaction Su	rvey 2			
					Page 1: Customer
Overall, I am very satisfied with the way of the company performed on this produc	:t.				Û
Overall, I am very satisfied with the way of the company performed on this product O Strongly Agree O Agree O Neither Agree Nor Disagree		Strongly D	isagree		â
Strongly Agree Agree Nor Disagree	O Disagree		-	Strongly Disagree	•
Strongly Agree Agree Nor Disagree		Strongly D Agree	Disagree	Strongly Disagree	
O Strongly Agree O Agree O Neither Agree Nor Disagree Please indicate your level of agreement with each of the following statements: Company service representatives are well trained	O Disagree		-	Strongly Disagree	
O Strongly Agree O Agree O Neither Agree Nor Disagree Please indicate your level of agreement with each of the following statements: Company service representatives are well trained Company service representatives are well supervised	O Disagree		-	Strongly Disagree	
Overall, I am very satisfied with the way of the company performed on this product Strongly Agree Agree Nor Disagree Please indicate your level of agreement with each of the following statements: Company service representatives are well trained Company service representatives are well supervised Service representatives adhere to professional standards of conduct Service representatives act in my best interest	O Disagree		-	Strongly Disagree	

- By Clicking on the 'More Options' icon will display a list of options to be applied to 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 the '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.'

Publish Survey		
Selected Survey :	Mobile Trends Survey	
Publish Name :	Mobile Trends Survey	*
	30 characters remaining.	
Start Date :	09/15/2015	*
Expiry Date :	09/30/2015	*
Expiry Date Message:	Sorry, Survey is expired. Please contact author of this survey.	*
		li
	Create	

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

#### Publish Your Survey

Mobile Trends Survey 🚱 @ 🗭 🏛

#### • Other Related Options:

Options	Task Assigned
0	Add Web Link Collector
@	Add Email Collector
Ø	Edit Publish
Û	Delete Publish

#### 6.2. Collector(s): Accessing Collector Options

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

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

BDB Survey provides two ways to access collector option:

- i) Click the 'Create' option offered at the end of the Publish Survey information
- ii) The following options will be displayed to create a collector:



#### Now Create Collector Using :

WebLink Collector OR Email Collector

iii) The 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 (  $^{igodold op}$  and  $^{igodold op}$  ) can be used to create a new collector

Mobile Trends Survey

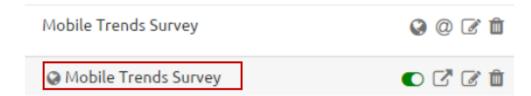
#### 6.3. Creating a Web Link Collector

- 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'

Collector Name:	Mobile Trends Survey	*
	30 characters remaining.	
Close Collector Message:	Survey is closed by the administrator. Please contact the administrator.	*

🚱 @ 🕑 🛍

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



• Related Options:

lcon	Name	Allotted Function
Cor	Switch On/Off	Switch On/Off button to enable or disable the Weblink
	button	
2	View URL Link	Displays the URL (link) for the weblink collector
Ø	Edit Weblink	Allows to edit Weblink Collector settings for the end users
	Collector	

Copyright © 2015-2019 BDB



Û	Delete	the	Deletes the created collector	
	Weblink			
	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.'

Collector Name:	Mobile Trends Survey	*
	30 characters remaining.	
Close Collector Message:	Survey is closed by the administrator. Please contact the administrator.	*

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

Publish Your Survey	
Mobile Trends Survey	o 🖉 @ 🕼 🛍
@ Mobile Trends Survey	+ 7 🛍

#### • Related Options:

lcon	Allotted Function
+	Add Recipients to email collector
Ø	Edit collector settings for the end users
Û	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



	Email Collector Created Successfully
Add Recipient For Collector	
Collector Name:	Mobile Trends Survey
Add Recipients :	From Contacts Add Manually
	Add Recepient
Email Subject:	
Body of Email :	SURVEY LINKHI,         We Are Conducting a Survey And Your Response Would Be Appreciated.         This Link Is Uniquely Tied To This Survey And Your Mail Id So Please Do Not Forward This Mail To AnyOne.         SURVEY LINK
	4
	Add Link
	Create & Send Mail

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 the 'Action' option provided next to the contact details (by check marking the box).
- viii) Select the 'Action' option provided next to the Contact Group Name (by check marking the box).
- ix) Click 'Done.'



	Contac	t Group Present			×
Group Name				Action	
▼ Mobile Survey Group				<b>~</b>	
First Name	Last Name	Email Id	Action		
prakash	joshi	prakash.joshi@bdbizviz.com			
<ul> <li>Survey Group</li> </ul>					
• Survey Group		_			
		Done			
					Close

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

Add Recipient For Colle	ctor	
Collector Name:	Mobile Trends Survey	*
Add Recipients :	From Contacts Add Manually	
	prakash.joshi@bdbizviz.com;prakash;joshi	
		Add Recepient

#### 2. Adding Recipients Manually

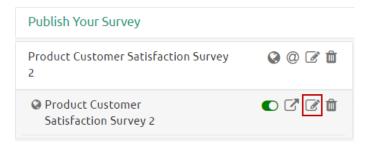
- i) Navigate to the 'Add Recipients for Collector' page
- ii) Select 'Add Manually' option
- iii) Manually add recipients' details into the given space
- iv) Follow the below mentioned format to add the recipient name: <u>email@email.com; first name; last</u> <u>name</u>

Add Recipient For Colle	ctor	
Collector Name:	Mobile Trends Survey	*
Add Recipients :	From Contacts ( Add Manually	
	prakash.joshi@bdbizviz.com;praksh;joshi	
	(If adding mannualy please Enter one recipient detail in one line in the order mailid, firstname, lastname seprated by semicolon(;) For Example. john@gmail.com; John; Peterson)	



#### 6.5. Editing Collector(s)

- i) Navigate to the 'Publish Your Survey' list.
- ii) Click 'Edit' <sup>[]</sup> 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.

Collector Name :	Product Customer Satisfaction Survey 2	
	12 characters remaining.	
Close Collector Message :	Survey is closed by the administrator. Please contact the administrator.	
Collector Settings :		
Result's Analytics :		
BizViz Analytics for E		
	for End User	
Benchmark Analysis f	for End User	
Benchmark Analysis f Custom Thank You : False Survey End Page : Standard E	for End User	
Benchmark Analysis f Custom Thank You : False Survey End Page : Standard E	for End User	

#### • 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.'

🔽 Overall, I am very satisfie	d with the way of the company performed on this product.	
Please indicate your leve	l of agreement with each of the following statements:	
Considering the overall v	alue of the project you paid for, was it	
How often do you typica	lly use the product	
If you contacted custom	er service, have all problems been resolved to your complete satisfaction?	
How likely is it that you v	vould recommend our company to a friend or colleague?	
How long have you been	a customer of our company?	
How responsive have we	been to your questions or concerns about our products	
Rate the following state	ments about company	
If you would like to share	any additional comments or experiences about product, please share below	
		Close 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. Choose either of the choices out of 'Yes' or 'No' options
- 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. Choose either of the choices out of 'Yes' or 'No' options
- ii. Selecting 'Yes' will display the applied filters to the end user

#### Collector Settings :

Result's Analytics :		
BizViz Analytics for En	d User	
Select Questions :	Select questions for End user	
Public Link Status :	ACTIVE IN-ACTIVE	
Public URL :	http://182.75.180.61:8080/app/views/survey/ VMs72UqUWb4shBaZ_0UmiWYS0OIKK	attempt.html#/SurveyAnalyticalResult/s9W
Would you like to display re	sults, if collector is closed or publish expired :	Yes No
Would you like to display Fi	lters or filtered data of a View to end user :	Ves No

#### 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. Choose either of the choices out of 'Yes' or 'No' options
- 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:

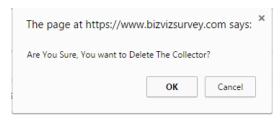
- i. Choose either of the choices out of 'Yes' or 'No' options
- ii. Selecting 'Yes' will display the applied filters to the end user

✓	Benchmark Analysis for End User		
	Public Link Status:		
	Public URL:	https://www.bizvizsurvey.com/views/survey/attempt.html#/Surve iTWkLImpmgYU4sXRxL-BFEJ92WY9-7RSJVeI	yAnalyticalResult/r6xc-
	Would you like to display results, if collector is clos	ed or publish expired:	Yes 🔿 No
	Would you like to display Filter to end user: (If you s	elect Yes then filter created in analysis will not apply)	Ves No

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.
- ii) Click the 'Delete' <sup>III</sup> icon 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

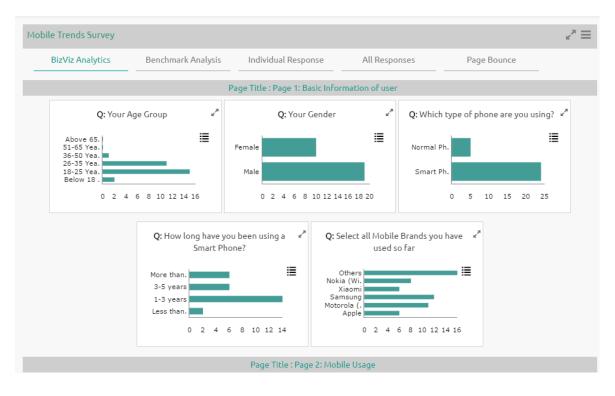
Collected Survey responses are displayed through advanced visualization in this segment.

- 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 on the full screen.



# 7.1. BizViz Analysis

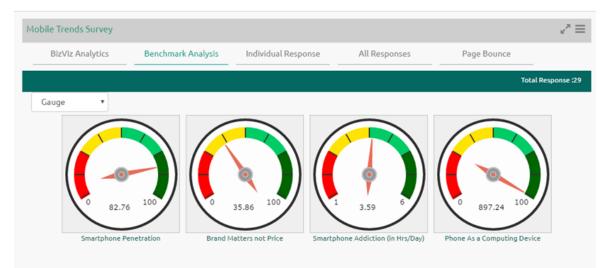
This section displays question specific analysis of the survey responses through graphical charts.



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.

www.bdb.ai



	All Re letion Status : lector Status : IP Address:	COMPLETED OPEN 115.119.248.130	Page Bounce	
Comp Col	lector Status :	OPEN	Delete Response	
Co	lector Status :	OPEN		

# 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.'

ate Filter	+	Mobile Trends Surve	y			
Filter	Show	BizViz Analytics	Benchmark Analysis	Individual		Da e a Da una e a
Filter Name :*	Filter Name		Andtysis	Response	All Responses	Page Bounce
elect View : *	Default View 🔻	You	can view all respon	ses in excel and csv	format by clicking bel	ow buttons.
ct Filter Type : *	Select Filter Type 🔹		Export i	n Excel	Export in CSV	
cess filter!!	all mandatory fields, To					
ved View fault View						
'here is no filter a 'lease create filte	vailable in this view, r !!					
1obile_Trends_Su	Ixlsx					

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



Today         Mobile_Trends_Survey_All_Data_xtsx       blob.http://app.bdbizviz.com/6826bb02.618a-4d2f-bac2-5ea2964e14e3         Show in folder       Show in folder         Vesterday         SkypeSetupFull.exe         https://download.skype.com/770ec8c5f481786ef5f9463271b5023/partner/80/5k         Show in folder	Downloads		h downloads	
blob:http://app.bdbizviz.com/6826bb02-618a-4d2F-bac2-5ea2964e14e3         Show in folder         Yesterday         SkypeSetupFull.exe         Image: https://download.skype.com/f770ec8c5f481786ef5f9463271b5023/partner/80/Sk	_	Today		
SkypeSetupFull.exe × https://download.skype.com/f770ec8c5f481786ef5f9463271b5023/partner/80/Sk_		×	blob:http://app.bdbizviz.com/6826bb02-618a-4d2f-bac2-5ea2964e14e3	×
Skypesetuprun.exe https://download.skype.com/f770ec8c5f481786ef5f9463271b5023/partner/80/Sk		Yesterday		
			https://download.skype.com/f770ec8c5f481786ef5f9463271b5023/partner/80/Sk_	×

e. Click on the file to open it.

_	_		-										_			
8						Mobile_Tre	nds_Survey	_All_Data (3)	[Protected '	View] - Exce		Sign	in (	Ŧ -		
File	Hon	ne Inse	rt Pag	e Layout	Formulas	Data	Review	View	♀ Tell me	what you wa	nt to do					
0	PROTECTE	D VIEW Br	e careful—f	iles from the	Internet ca	n contain viru	ises. Unles	you need to	edit, it's safe	er to stay in F	rotected View	. Enabl	e Editing			
A1		>	$\langle \checkmark$	<i>f</i> <sub>x</sub> Re	sponseID											
			-		-		-									
	A	В	C	D	E	F	G	Н		J	К	L	М	N Your Ger	0	w
1 R	esponse	romip	Collectori	Attempte	Collector	TCollector	Emailid	Your Age		- 25 AF M	36-50 Year 5	1 CE V Al				S
3								Below 18	18-25 Yea	120-35 Year	30-50 Years	1-05 Year Ar	50ve 65	ware	Female	- 5
	0007000 1	15 110 24	0100505	04/10/201		K Mobile Tr		Below 18							Female	
						K Mobile Tr		Below 18		26-35 Year				Male	Female	
						K Mobile Tr				26-35 Year				Male		s
						K Mobile Tr		Below 18		20-33 Teal				Male		- 3
					-	K Mobile Tr		001011-10	18-25 Yea					mare	Female	s
8						Mobile Tr			10 20 100	26-35 Year				Male	. cinare	S
						Mobile Tr				26-35 Year				Male		s
9		15.119.24									36-50 Year			Male		S
9 10					-	K Mobile Tr										
9 10 11	9207835 1 9207836 r	null	9109505	04/12/201	WEB_LIN					26-35 Year	oo oo real				Female	S
9 10 11 12	9207835 1 9207836 r 9207837 1	null 182.75.173	9109505 9109505	04/12/201 04/12/201	WEB_LINI	K Mobile Tr			18-25 Yea	26-35 Year	bo bo real			Male	Female	
9 10 11 12 13 14	9207835 1 9207836 r 9207837 1 9207838 1 9207838 1 9207839 1	null 182.75.173 115.119.24 122.171.18	9109505 9109505 9109505 9109505	04/12/201 04/12/201 04/12/201 04/12/201	WEB_LINE WEB_LINE WEB_LINE WEB_LINE	K Mobile Tri K Mobile Tri K Mobile Tri K Mobile Tri			18-25 Yea	26-35 Year				Male	Female Female	S
9 10 11 12 13 14	9207835 1 9207836 r 9207837 1 9207838 1 9207838 1 9207839 1	null 182.75.173 115.119.24 122.171.18	9109505 9109505 9109505 9109505	04/12/201 04/12/201 04/12/201 04/12/201	WEB_LINE WEB_LINE WEB_LINE WEB_LINE	K Mobile Tri K Mobile Tri K Mobile Tri			18-25 Yea	26-35 Year				Male Male		Si Si Si Si

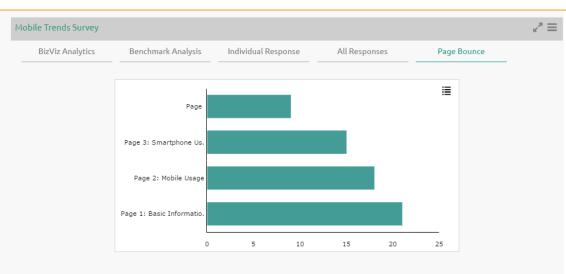
### 2. Export in CSV:

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 the recipients ended precisely a survey. The Page Bounce tab displays page-wise proportions of responses presented through an advanced analytical chart.





# 7.6. Creating a New View in the Analyze Result

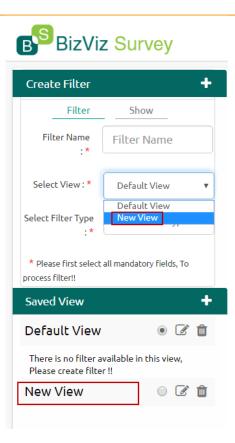
Users can create a new view and implement it in the Analyze Result tab.

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

S D: V		
Ber "		Create New View ×
Create Filte		
Filte	Create View :	New View 2
Filter Nam	create view.	
		3 Create Close
Select View		
Select Filter Type Select Filter Type	De Y	Data is not available for this page.
* Please first select all mandatory fields, rocess filter!!	То	In This Page There Is No Chart To Display.
Saved View		in this Page there is no chart to Display.
Default View 🔹 🛛	2 8	
There is no filter available in this view Please create filter !!	Ι,	
New View 🛛 🔘 🛛	3 🛍	

- 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.

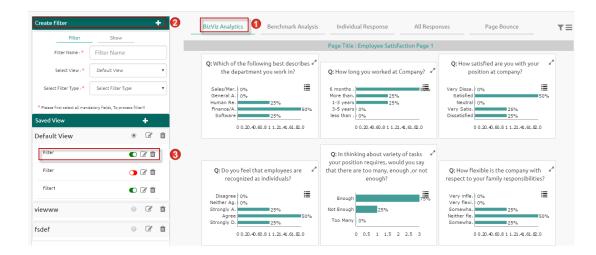
## 7.7. Filter Rule in the Analyze Result

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.

## 7.7.1. 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 the 'Create Filter' icon.
- v) The newly created filter will be listed under the 'Saved View' window.





# 7.7.2. Managing a Created Filter

The following table displays all the required options to manage the created filter.

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

# 7.7.3. 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.

# 7.7.4. Filter Types

## **1. Filter by Collector:**

- Users can check the response of a specific collector by applying this filter
- Multiple collector filters can be selected at a time



Create	Filter	+
	Filter	Show
	Filter Name : *	Filter by collector
Selec	t Filter Type : *	Filter by Collector
Select (	Collectors to filter	response : *
<b>~</b>	Web link collecto	or 2
<b>~</b>	test email collect	tor
	Web link collecto	or 1
		E Filter Response(c)

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

### 2. Filter by Completeness

- It filters responses by their status
- The responses can be divided into four sections, based on their status:
  - Completed Responses
  - o Not Completed
  - Attempted Responses
  - Disqualified Responses

	Filter	Show
	Filter Name : *	filter by comleteness
Sele	ct Filter Type : *	Filter by Completeness
2	Complete Respo	inses



### 3. Filter by Respondent Metadata

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



Filter	Show
Filter Name : *	Filter by respondent dat
Select Filter Type : *	Filter by Respondent Meta
Respondent Metadata to	o filter response : *
IP Address :	XXX.XXX.XXX
Email Address:	amit.kumar@bdbizviz.cc
First Name :	First Name
Last Name:	Last Name
	e Email Address, First Name and to filter responses of "Email

## 4. Filter by Time

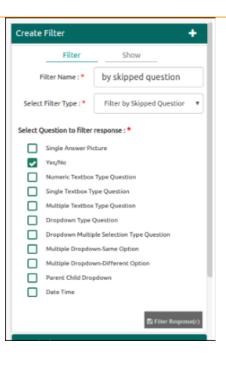
- The time of response is captured when a response is saved.
- Select a specific time by providing a start date and end date to filter responses.

Create Filter	+
Filter	Show
Filter Name : *	by time period
Select Filter Type : *	Filter by Time Period
Select Date period to filt	er response : *
Start Date :	07/06/2016
End Date :	01/05/2017
	E Filter Response(c)

### 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).
  - Open-ended Questions: Questions with undefined answer choices (E.g., Textbox, Comment).

#### Question-Answer Filter applied to the Various Question formats:

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 the case of extensive comments, it depends upon row and column size and text limitation.
- c. Admin can filter some selected text from users' comment as a response on any chosen level.
- d. Levels on which the text has been matched are:
  - i. All Words
  - ii. Any Word
  - iii. Exact Phrase



Filter	Show
Filter Name : *	Comment type
Select Filter Type : *	Filter by Question and Ansv
Select Question : *	Single Comment Type Ques
Matching Level :	All Words
Matching Words :	All Words Any Word Exact Phrase
test	EXACT FINASE

#### 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 a response on any chosen level.
- d. Levels on which the text has been matched are:
  - i. All Words
  - ii. Any Word
  - iii. Exact Phrase

Create Filter	+	,
Filter	Show	
Filter Name : *	Text box type	
Select Filter Type : *	Filter by Question and Ansv	•
Select Question : *	Single Textbox Type Questi	•
Matching Level :	All Words	•
Matching Words :	All Words Any Word	٦
Find string	Exact Phrase	
₿ Filter Response(c)		

- 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 the row.
  - c. Admin can filter some selected text from users' comment for only one row of the 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

Create Filter	+
Filter	Show
Filter Name : *	Multiple text type
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Multiple Textbox Type Que:
Choose a Row:	Select Row
Matching Level :	All Words 🔻
Matching Words :	
Hello world	
* Please first select all mandatory fields, To process filter!!	

- 4. Contact Details:
  - a. Responses can be filtered by matching the entered text from Users' response to this question type.
  - b. It is the same as Textbox, but the rows will be provided with the fixed description in this type of question.
  - c. Admin can filter some selected text from users' comment for only one row of the 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

Create Filter	+
Filter	Show
Filter Name : *	filter on Contact detail
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Contact Details Type Quest 🔹
Choose a Row:	Select Row 🔻
Matching Level :	Select Row Name
Matching Words :	Company Address
Hello world	Address2 City / Town State / Province
* Please first select all man	ZIP / Postal Code Country Email Address
Saved Filter	Phone Number



#### 5. Numerical Textbox:

- a. Responses can be filtered by matching the entered number from Users' response.
- b. Responses can be filtered by a given number in the 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

Create Filter	+
Filter	Show
Filter Name : *	filter on Numerical
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Numeric Textbox Type Que 🔹
Matching Level :	Equal to 🔻
Matching Words :	Greater than Less than
5	Equal to
	Pilter Response(c)

#### 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 the option to select a value in each range only.
- c. Responses can be filtered by a given number in the 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

Filter	Show	
Filter Name : *	filter on slider	
Select Filter Type : *	Filter by Question and Ansv	v
Select Question : *	Slider	v
Matching Level :	Equal to	•
Matching Words :	Greater than Less than	
30	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 the option to select a value in each range only.
  - c. Responses can be filtered by a given date with constraints of matching level in the 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 constraints mentioned above apply on the selected date.

Create Filter	+
Filter	Show
Filter Name : *	filter on Date/time
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Date Time 🔻
Matching Level :	Exactly •
Select Date/Time	Exactly Before
07/13/2016 10:13 FM	
	🖺 Filter Response(c)

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

Create Filter	+
Filter	Show
Filter Name : *	filter on MCSA
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Multiple Choice Single Ansv 🔹
Select Option : Option 1 Option 2 Option 3 Option 4	
	🖺 Filter Response(c)



- 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 in all the tabs on the right panel.

Create Filter	+
Filter	Show
Filter Name : *	filter on YN
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Yes/No 🔻
Select Option : Yes No	
	🖺 Filter Response(c)

#### **10. Single Answer Picture:**

- a. Responses can be filtered by matching the selected option from the Users' response.
- b. Users can select only one option to filter the responses. The selected option will be reflected in all the tabs on the right panel.
- c. Users are provided with extra information.

E.g., An image gets provided with each option to express the option very clearly.

Create Filter	+
Filter	Show
Filter Name : *	filter on SAP
Select Filter Type : *	Filter by Question and Ansv
Select Question : *	Single Answer Picture
Select Option : Option 1 Option 2	
	E Filter Response(c)

11. Multiple Answer Picture:

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



Create Filter	+
Filter	Show
Filter Name : *	Filter on MAP
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Multiple Answer Pictures 🔹 🔻
Select Option : Option 1	
Option 2 Option 3	
	器 Filter Response(c)

#### 12. Net Promoter Score:

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

Create Filter			+
	iter	Show	
Pilter Na	THE : *	Filter on NPS	
Select Filter Ty	pe : *	Filter by Question and An	
Select Questi	ion : *	How likely is it that you we	
Select Option : Detractors (0-6) 0 - Plot at all likely 1 2 3 4 5 6 Passive (7-8) 6 Passive (7-8) 7 9 Promotors (8-18) 9 10 - Extremely likely 2 2 2 2 2 2 2 2 2 2 2 2 2		(cjern	

#### 13. Multiple Choice Multiple Answer:

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

Create Filter	+
Filter	Show
Filter Name : *	Filter on MCMA
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Multiple Choice Multiple Ar 🛛 🔻
Select Option :	
Option 1	
Option 2	
Option 3	
Option 4	
	#2 Filter Response(c)



#### 14. Rating Scale:

- a. Responses can be filtered by matching the selected option from the Users' response.
- b. Users can select any a row value from the drop-down menu.
- c. Select a column or multiple columns using the radio box.

Create Filter	+
Filter	Show
Filter Name : *	Filter on rating scale
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Rating Scale Type Answer 🛛 🔻
Select Row :	Row 2
Select Column : Column 1 Column 2 Column 3	
	巴 Filter Response(c)

d. Based on the above selection response gets filtered.

#### **15. Matrix Single Answer Per Row:**

- a. Responses can be filtered by matching the selected option from the 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.

Create Filter	+
Filter	Show
Filter Name : *	Filter on MTSA
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Matrix Type Single Answer 🔹
Select Row :	Row 2 🔻
Select Column : Column 1 Column 2 Column 3	
	🖹 Filter Response(c)

- 16. Matrix Multiple Answer Per Row:
  - a. Responses can be filtered by matching the selected option from the Users' response.
  - b. Users can select a row value from the drop-down menu and a column from the checkbox. Based on this selection response will be filtered.
  - c. Each selection is mandatory.



Create Filter	+	
Filter	Show	
Filter Name : *	Filter on MTMA	
Select Filter Type : *	Filter by Question and Ansv 🔹	
Select Question : *	Matrix Type Multiple Answe	
Select Row :	Row 2	
Select Columns : Column 1 Column 2 Column 3		
	S Filter Response(c)	

#### 17. Ranking:

- a. Responses can be filtered by matching the selected option from the 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.

Create Filter	+
Filter	Show
Filter Name : *	Filter on Ranking
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Ranking <b>v</b>
Select Row :	Option 2
Select Column : 1 2 3	Filter Response(c)

#### 18. Dropdown:

- a. Responses can be filtered by matching the selected option from the Users' response.
- b. Users can select only one option to filter the responses. The chosen option will be reflected on all the tabs on the right panel.



Create Filter	+
Filter	Show
Filter Name : *	Filter on dropdown
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Dropdown Type Question 🔻
Select Option :	
Option 1	
Option 2	
Option 3	
Option 4	
	🖺 Filter Response(c)

### **19. Dropdown Multiple Selection:**

- a. Responses can be filtered by matching the selected option from the 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 on all the tabs on the right panel.

Create Filter	+
Filter	Show
Filter Name : *	Filter on dropdown_MS
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Dropdown Multiple Selectie 🔹 🔻
Select Option :	
Option 1	
Option 2	
Option 3	
Option 4	
Option 5	
	🖺 Filter Response(c)

20. Multiple Dropdown Same Option:

- a. Responses can be filtered by matching the selected option from the Users' response.
- b. Users can select any one-row value from the drop-down (i.e. 'drop-down 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.



Create Filter	+
Filter	Show
Filter Name : *	Filter on MDSO
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Multiple Dropdown-Same C 🔹
Select Row :	Dropdown Head 2
Select Column : Option 1 Option 2 Option 3 Option 4 Option 5	
	Pilter Response(c)

#### 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. 'drop-down head') and one column from the radio box to filter responses. Based on this selection response will be filtered.
- c. Each selection is mandatory.

Create Filter	+
Filter	Show
Filter Name : *	Filter on MDDO
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	Multiple Dropdown-Differe 🔹
Select Row :	Dropdown Head 2
Select Column : Option 1 Option 2 Option 3 Option 4	
	E Filter Response(c)

#### 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.



Create Filter	+
Filter	Show
Filter Name : *	Filter on MaDSO
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	MATRIX Dropdown-Same O 🛛 🔻
Select Row :	Row 1
Select Column :	Col 2
Select Option : Option 1 Option 2	
	間 Filter Response(c)

- 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.

Create Filter	+
Filter	Show
Filter Name : *	Filter on MaDDO
Select Filter Type : *	Filter by Question and Ansv 🔹
Select Question : *	MATRIX Dropdown-Differei 🔹
Select Row :	Row 2
Select Column :	Col 2 🔻
Select Option : Option 1 Option 2 Option 3	
	🖺 Filter Response(c)

- 24. Parent-Child Drop-down 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.



Create Filter	+	
Filter	Show	
Filter Name : *	Filter on PCDD_2	]
Select Filter Type : *	Filter by Question and Ansv	
Select Question : *	Parent Child Dropdown	
Select First Level :	Level 1 Option 1	
Select Second Level :	Level 2 Option 1	]
	图 Filter Response(c)	

- 25. Parent-Child Drop-down 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.

Filter	Show	
Filter Name : *	Filter on PCDD_3	
Select Filter Type : *	Filter by Question and Ansv	٣
Select Question : *	Parent Child Dropdown 3 le	٣
Select First Level :	Level 1 Option 2	•
Select Second Level :	Level 2 Option 11	٣
Select Third Level :		
Level 3 Option 1		
O Level 3 Option 2		
	🖺 Filter Respons	

**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.'



Filter Updated Successfully !!!	BizViz Analytics Benchmark Analysis	Individual Response All Respo	nses Page Bounce
reate Filter +		Page Title : Employee Satisfaction Page 1	
Ion: "TEXTBOX", DESCRIPTIVE, NUMERICAL_TEXTBOX", SLIDER, DATE_TIME, OIGTAL_BIONATURE, 'CONTACT_DETALLS, NUTITEL_TEXTBOX, 'NACET byse of Oversions are not displayed in ne BitVit Analytics tab. All these questions are available in individual septone.	Q: Which of the following best describes "" the department you work in?	Q: How long you worked at Company?	Q: How satisfied are you with your ** position at company?
Employee Satisfaction Page 1	Sales/Mar. 0%	6 months . More than. 0%	Very Dissa. 10%
Which of the following best describes the department you work in?	Human Re. 50% Finance/A. 50% Software 0%	1-3 years 0% 3-5 years 0% less than . 0%	Neutral 0% Very Satis. 0% Dissatisfied 0%
How long you worked at Company?     How satisfied are you with your position at company?	0 0.10.20.30.40.50.60.70.80.91.0	0 0.20.40.60.8 1 1.21.41.61.82.0	0 0.20.40.60.8 1 1.21.41.61.62.0
Do you feel that employees are recognized as			

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

Which of the following best describes the department you work in? How long you worked & Company? How satisfied are you with your position at company? Do you feet (hat employees are recognized as individual?	No Question Has Been Selected In Show Tab.
In thinking about variety of tasks your position requires, would you say that there are too many, enough.or.not enough?	Page Title : Employee Satisfaction Page 1
enough (or more enough)     enough (or more enough)     enough (or more enough)     enough (or more enough)     enough (or experiment of a spot for a job at this     company)     Have you ever observed or experienced any of the     following forms of discrimination or harassment at     this company)     Employee Satisfaction Page 1     Plasse indicate your level of agreement with each of     the following tattements.     Move well are you paid for the work you do?     How well are you paid for the work you do?     How wells are you with your employee benefics?     Do you have any feedback or comment?     Eligible Satewell	Q: Please indicate your level of agreement with each of the following statements.         My job re.         I receive.         I neceive.         D 0.20.40.60.8 1 1.21.44.61.62.0             Q: How challenging is your job?             Q: How challenging is your job?             Preceive.         D 0.20.40.60.8 1 1.21.44.61.62.0

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

# 8. More Options

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

## 8.1. Preview Survey

- i) Navigate to the survey list.
- ii) Click 'Settings' 🍄 for options.
- iii) Select the 'Preview Survey' option.
- iv) Users will be redirected to the 'Preview' page.



All questions_Sep 1	<b>₽ ⋈ \$</b>
Created On : 09/01/2016 Completed Responses : 0	
Employee Satisfaction Survey	a 🗠 🔅
Created On : 08/31/2016 Completed Responses : 4	Preview Survey Benchmark
Excel & CSV export	🗅 🛃 Manage Datamart
Created On : 08/31/2016 Completed Responses : 4	Delete Survey Copy Survey
Test for signature with all the question	Survey Summary
Created On : 08/30/2016 Completed Responses : 9 Not Completed Responses : 5	

- v) Select any of the device options at the top of the page.
- vi) The Survey questions will be displayed in the selected preview mode.

	Employee Satisfaction Survey
1	Employee Satisfaction Page 1
	Which of the following best describes the department you work in?  Human Resources  Finance/Accounting  General Administration  Sales/Marketing  Software  If any other , Please mention here :
	200 characters remaining

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 prerequisite to set goals, before using Benchmark as 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 '**Setting**s' 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.

Edit Benchmark	
Benchmark Title :	Mobile Trends Survey-Benchmark * 20 characters remaining.
Benchmark Mission:	Mission
Benchmark Vission:	Vision
	Save

## 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 the 'Save' option.

Benchmark Name : ed Survey : Mobile Trends Survey	Mobile Trends Survey-Benchmark
Goal Name :	Popular Brand
	37 characters remaining.
Goal Description :	
Upper Threshold :	22
Lower Threshold :	1
Operation On Goal Question Values :	Average
Is High Value True :	True

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 the 'True' option for 'Is High-Value True' field.

## 8.3. Editing a Benchmark Goal

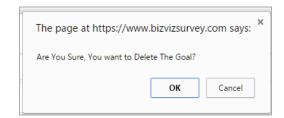
- i) Select 'Edit' 🕝 provided next to a Benchmark goal name (on the left pane of the page)
- ii) Users will be redirected to the 'Edit Benchmark Goal' page (on the right pane of the page)
- iii) Edit the below mentioned details (if desired):
  - Goal Name
  - Goal Description
  - Upper Threshold
  - 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 the 'Update Goal' option.

Benchmark Name :	Mobile Trends Survey-Benchmark
Goal Name :	Popular Brand
	37 characters remaining.
Goal Description :	
Upper Threshold :	22
Lower Threshold :	0
Operation On Goal Question Values :	Average
Is High Value True :	True

v) The edited goal information will be saved.

# 8.3.1. Deleting a Benchmark Goal

- i) Select '**Delete**' <sup>III</sup> provided next to the benchmark goal name (on the left pane of the page).
- ii) A pop-up message will appear to confirm the deletion.
- iii) Click the 'OK' option.



iv) The selected benchmark goal will be deleted.



## 8.3.2. 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.

Add Questions For Goal	
Survey Name :	Mobile Trends Survey
Benchmark Name :	Mobile Trends Survey-Benchmark
Goal Name :	Popular Brand
Select Questions :	Select all Mobile Brands you have used so far
	Save

- iii) Users get redirected 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 the 'Done' option.

	Enter Question R	ule Value For Goal	×
			,
	Question : Overall, I am very satisfied with	the way of the company performed on t	his product.
	Strongly Agree :	10	
	Agree :	9	
	Neither Agree Nor Disagree :	8	
	Disagree :	7	
	Strongly Disagree :	6	
	•		
Show Help ?	•		Done

- vii) Users will be directed back to the 'Add Questions for Goal' page.
- viii) Click the 'Save' option.
- ix) The 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.



# 8.3.3. 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

View Questions			+ 🖸 🌮	
Show 10 • entries Search:				
Associated Questions	Question Type	Calculated Value 🝦	Actions 🖨	
Select all Mobile Brands you have used so far	Multiple Answer	6.42	e 🖞	
Showing 1 to 1 of 1 entries		Previous	1 Next	

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

## 8.3.4. Deleting a Benchmark Goal Question

- i) Navigate to the question list for a benchmark goal.
- ii) Click 'Delete' i provided under 'Actions'.
- iii) A pop-up window will appear to confirm the deletion.
- iv) Click the 'OK' option.



v) The selected question will be removed from the benchmark goal.

## 8.4. Managing Datamart

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

## 8.4.1. 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 the port number
- f. User Name: Provide the username
- g. Password: Provide a password
- h. Datamart Description: Enter a description of 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)

	Create/Update Datamart for Survey: Copy_Of_RajnishTst	C
Datamart Status :	No Datamart Has Been Created.	
Database Type :	My SQL *	
Database Name :	DB_NAME *	
URL :	192.168.0.11 *	
Port :	3306 *	
User Name :	USER *	
Password :	****	
Datamart Description :	DESC	
	Create/Update Datamart Reset	

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 the successful creation of a Datamart.

	View Datamart Details for Survey: RajnishTst	C
Datamart Status :	Your Last Datamart Was Created Successfully.	
Last Updated :	2016-02-03 17:33:55	
Database Type :	My SQL *	
Database Name :	ABCDAAA *	
URL :	192.168.0.11 *	
Port :	3306 *	
User Name :	root *	
Password :	****	
Datamart Description :	Enter Datamart Description	
	Edit Datamart Detail Update Record	

# 8.4.2. Implementing Scheduler in the DataMart Section

i) Select a Survey from the Survey list.



# ii) Click 'More Options' 🍄

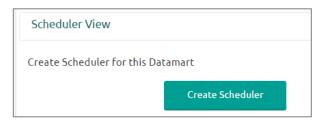
iii) Select 'Manage DataMart' option from the menu.

slider	C 🕰 🗠 🛱
Created On : 11/10/2016 Completed Responses : 1	Preview Survey Benchmark
Sanity_2.5_Nov10_All Questions	🐼 🚳 🛃 Manage Datamart
Created On : 11/10/2016 Completed Responses : 5 Not Completed Responses : 43	Delete Survey Copy Survey
Validations_Nov 10	🕼 🗗 🔽

- iv) DataMart details will be displayed.
- v) Click 'Update Settings' 🕘

lanage Datamart of Your Surv	rey		
slidertest_nov10	O S t	Datamart Details of Survey: slider	
		Database Name :	slidertest_nov10
		URL :	192.168.1.10
		Port :	3306
		Update Status :	Manually
		Last Updated :	11/10/2016 3:39 P

- vi) The 'Scheduler View' page will be displayed.
- vii) Click the 'Create Scheduler' option.



- 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 the 'Save' option.



Scheduler View					
Hourly	Daily	Weekly	Month	nly	Yearly
Start da	te 11/	11/2016 12:50 PM	<b></b>		
Every		hou	r(s)		
At	01	• 04	•	hou	r(s)
End date	e 11/	12/2016 12:50 PM			
	s	ave			

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

Scheduler View	/					
Hourly	Daily	Wee	kly	Month	ly	Yearly
Start da	ate	11/11/2016 4:5	59 PM			
Ever	у		hour	(s)		
At		01 •	04	•	ho	ur(s)
End dat	te	11/12/2016 4:5	59 PM	<b></b>		
	I	Edit Scheduler	Sto	p Scheduler		

## • Editing the Scheduler:

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

Scheduler View	,			
Hourly	Daily	Weekly	Monthly	Yearly
Start da	te 11/1	1/2016 4:59 PM		
Every	/	hou	r(s)	
At	03	• 04	t v	hour(s)
End dat	e 11/1	12/2016 4:59 PM		
	Upda	ate Scheduler Sto	op Scheduler	



- The scheduler information will be updated successfully.
- Stopping a Scheduler:
  - Click 'Stop Scheduler' on the 'Scheduler View' screen.
  - The scheduler will be stopped.

Scheduler View						
Hourly	Daily	Weekl	у	Monthly		Yearly
Start da	te	11/11/2016 4:59	PM			
Every	,		hour(s)	)		
At		03 •	04	•	hour(s)	)
End date	e	11/12/2016 4:59	PM	<b></b>		
		Edit Scheduler	Stop S	Scheduler		

• Click 'Restart Scheduler' to resume the scheduler

cheduler View					
Hourly	Daily	We	ekly	Monthly	Yearly
Start date	1	1/11/2016	1:59 PM	<b></b>	
Every			hour	(s)	
At		03 •	04	•	hour(s)
End date	1	1/12/2016	4:59 PM		
		Edit Schedul	er Resta	rt Scheduler	

## 8.4.3. Other Options

- i. Update Now:
  - **1.** Click **'Update Now' 1** 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'



Update Manually here		
	Last Updated :	2016-11-10 16:59:57

- **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'

Vi	ew Datamart Details for Survey: slider	
Datamart Status :	Your Last Datamart Was Created Successfully.	
Last Updated :	2016-11-10 15:39:39	
Database Type :	My SQL	*
Database Name :	slidertest_nov10	*
URL:	192.168.1.10	*
Port :	3306	*
User Name :	admin	*
Password :		*
Datamart Description :	Enter Datamart Description	1.
	Edit Datamart Detail Update Record	

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



	Update Datamart for Survey: slider	
Datamart Status :	Your Last Datamart Was Created Successfully.	
Last Updated :	2016-11-10 15:39:39	
Database Type :	My SQL	*
Database Name :	slidertest_nov10	*
URL :	192.168.1.10	*
Port :	3306	*
User Name :	admin	*
Password :		*
Datamart Description :	Enter Datamart Description	
	Update Datamart Reset	

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 arsigma

## 8.5. Deleting a Survey

- i) Navigate to the survey home page.
- ii) Click on the '**Settings**' option <sup>\*</sup> 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 the '**OK**' option.

The page at https://www.bizvizsurvey.com says:				
Are You Sure, You Want To Delete The Survey ?				
OK Cancel				

vii) The selected survey will be deleted.



# 8.6. 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'.

Copy_Of_Mobile Trends Survey		C 🛆 🗠 🔅
Created On : 16/09/2015	Responses : 0	
Test 2		🐼 🗠 🌢 🗹
Created On : 15/09/2015	Responses : 0	
Test		C 🌢 🗠 🔅
Created On : 14/09/2015	Responses : 0	
Mobile Trends Survey		C 🌢 🗠 🔅
Created On : 08/09/2015	Responses : 0	

### Note:

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

## 8.7. Survey Summary

- This feature displays design and response summaries for the selected survey.
- Navigate to the Survey home page.
- Click the 'Settings' 🍄 icon.
- A drop-down menu will be displayed.
- Select 'Survey Summary' option from the drop-down menu.
- A new page will be displayed containing the detailed survey summary.



BS BizViz Survey				2
Mobile Trends Survey				=
DESIGN SUMMARY	RESPONSE SUMMARY			
Mobile Trends Survey Created On : 04/12/2016	Total Responses		Overall Survey Sta	stus
Questions : 12, Pages : 4 Design Preview	Collectors Name Mobile Trends Survey	Responses 29	Created On 04/12/2016	Status OPEN
	Ana	lyze Result		

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

# 9. Contacts

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

# 9.1. Creating a Contact Group

- i) Click the<sup>4</sup> icon on the top right corner.
- ii) A context menu opens.
- iii) Select 'Contact' from the context menu.

	۵
🖞 🚰 Contacts	
쉽 Survey Templates	
P Help	

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

B <sup>S</sup> BizViz Survey			<b>.</b>
Contacts			+
Search	Create New Contact Group		
	Group Name :	Survey Group	*
		38 characters remaining. 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.

# 9.2. Creating New Contacts

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

## 9.2.1. 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 <sup>C</sup> context menu provided next to the Contact Name.

BizViz Survey	٩
Contacts	+
Search Survey Group 0 Edit Contact Group Delete Contact Group	Now Create Contacts Using : Upload Contacts From CSV OR Create New Contacts
Create New Contacts Upload Contacts From CSV List Contacts	

- 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'.

f Any Contact Alre	eady Exist, Duplicate Should Be	e: Igno	re 🔻	
<b>irst Name</b> first name	Last Name	Email abc@xyz.com	Mobile No.	Add
				Create

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

## 9.2.2. 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 <sup>4</sup> drop-down menu provided next to the Contact Name.

- ii) Users will be redirected on the 'Create Contacts' panel
- iii) Click 'Browse File'.

Create Contacts	
If Any Contact Already Exist, Duplicate Should Be :	Update •
Select CSV : Browse File Nee	d Help ?

- iv) Contacts details will be displayed on the screen from the CSV file.
- v) Select the '**Update**' option.
- vi) Select contact details by tick marking the boxes.
- vii) Click **'Submit**'.

Create Contacts				
If Any Contact Alread	y Exist, Duplicate Shoul	d Be : Update •		
Select CSV :	Browse File	Need Help ?		
Show 10 • entries			Search:	
First Name 🔺	Last Name 🛛 🌲	Emailid	Mobile No.	÷ 🗌
Anthony	Stephenson	Pellentesque.habitant.morbi@loremvitae.com	1-132-939-4924	<ul><li>✓</li></ul>
Bruno	Briggs	Donec.nibh@dolor.net	1-995-635-3400	
First Name	Last Name	Email	Telephone	
Karyn	Parrish	ipsum.Suspendisse@luctus.org	1-167-127-2739	
Libby	Butler	velit@ornareplacerat.co.uk	1-403-166-7610	
Showing 1 to 5 of 5 entrie	s		Previous	1 Next
				Submit

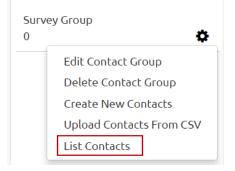
viii) The selected contacts will be uploaded to the contact list.

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

## 9.3. Listing a Contact

- i) Click the 'Settings' 🍄 icon on the contacts page.
- ii) A context menu will open.
- iii) Select the 'List Contacts' option.





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

Survey Group : O	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	Û	Ø
Bruno	Briggs	Donec.nibh@dolor.net	1-995-635-3400	Û	Ø
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 is to edit contact details for the selected contact.

# 9.4. Editing a Contact Group

- i) Click 'Settings' 🍄 on the contacts page.
- ii) A context menu will open.
- iii) Select the 'Edit Contact Group' option.

Surve 0	ey Group
	Edit Contact Group
	Delete Contact Group
	Create New Contacts
	Upload Contacts From CSV
	List Contacts

- iv) Users will be redirected to edit the contact group details.
- v) Edit the 'Group Name'.



#### vi) Click the 'Edit' option.

Edit Contact Group		
Group Name :	Survey Group	*
	38 characters remaining.	

vii) The desired information will be edited.

# 9.5. Deleting a Contact Group

- i) Click 'Settings' 🌣 icon on the contacts page.
- ii) A context menu will open.
- iii) Select the 'Delete Contact Group' option.

Surv 0	ey Group
	Edit Contact Group
	Delete Contact Group
	Create New Contacts
	Upload Contacts From CSV
	List Contacts

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

The page at https://www.bizvizsurvey.com says:				
Are You Sure, You want to Delete The Contact Group?				
	ОК	Cancel	]	

vi) The selected contact group will be deleted.

# **10.** Survey Template

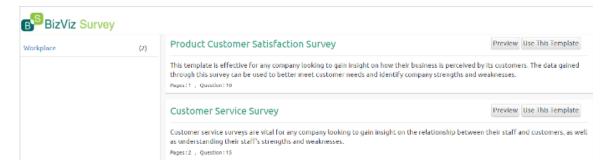
This option allows users to reuse surveys. Users can even modify the survey questions if needed.

- i) Click '**User**' <sup>a</sup> icon on the top right corner.
- ii) A context menu opens.
- iii) Select 'Survey Templates'.



	4
	📽 Contacts
-	役 Survey Templates
	😧 Help
	¥

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.

# 11. Help

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

- ii) A context menu opens.
- iii) Select the 'Help' option.

	2
📽 Contacts	
역 Survey Templates	
🕜 Help	

iv) Users will be redirected to the Survey help document.

B <sup>S</sup> BizViz Survey	Help
About this Guide	
1. Document History	
2. Overview	
3. Target Audience	
Creating a Survey	
<u>Designing a Survey</u>	
1. Questions	
1.1. Inserting a Survey Question	
1.2. Available Question Types	
2. Properties	
3. Inserting a New Page	
4. Page: Editing an Existing Page	
5. Survey Option	
6. Saving a Survey	
7. Other Icons	

# 12. Signing Out

Users will require to go through the following steps to complete the signing off process For the BDB Survey.

## **12.1.** Closing the BDB Survey

- i) The Survey app opens in a separate window while selecting 'Survey' option from the BDB Platform.
- ii) To 'Log Out' from the Survey application or close it, the user can click on the 'Close' 🎽 option from the Survey Window.

6	BDB: Decision Platform	×	BizViz Survey	⊗ +

iii) Closing the Survey window will redirect the user back to the BDB Platform homepage.

## 12.2. Signing Out

The following steps describe how to log out from the BDB Platform.

- i) Click the '**User**' icon  $\Theta$  on the Platform homepage.
- ii) The details of the logged in user appears.
- iii) Click the 'Sign Out' option.



iv) The user successfully signs off from the BDB Platform.

Note: Clicking on the 'Sign Out' option redirects the user back to the Log in page of the BDB platform.