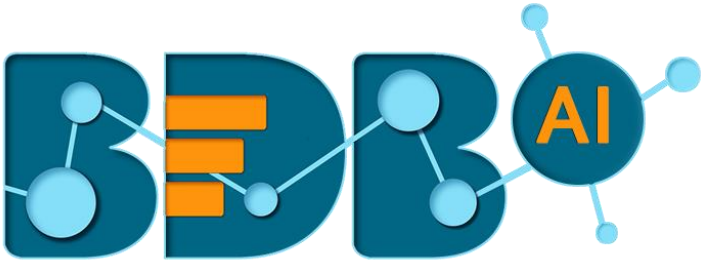


User Guide

Survey R-4.4

Contents

1. About this Guide 5
   1.1. Document History 5
   1.2. Overview 5
   1.3. Target Audience 5
2. Introducing the BDB Survey 5
   2.1. Introduction to the BDB Survey 5
   2.2. Supported Web Browsers 5
3. Getting Started with the BDB Survey 6
   3.1.1. Forgot Password Option 8
   3.1.2. Force Login 9
4. Creating 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. Designing 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. Publishing 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. Analyzing Result for a Survey 37
   7.1. BizViz Analysis 38
   7.2. Benchmark Analysis 38
   7.3. Individual Response 38

7.4. All Responses:....39
7.5. Page Bounce....40
7.6. Creating a New View in the Analyze Result....41
7.7. Filter 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. Show/Hide Rules for Page/Questions....58
8. More Options....59
8.1. Preview Survey....59
8.2. Benchmark....60
8.2.1. Editing a Benchmark....60
8.2.2. Adding Goal to a Benchmark....61
8.3. Editing 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. Managing 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. Deleting a Survey....70
8.6. Copying a Survey....71
8.7. Survey Summary....71
9. Contacts....72
9.1. Creating a Contact Group....72
9.2. Creating New Contacts....73
9.2.1. Creating New Contacts (Manually)....73
9.2.2. Uploading Contacts from CSV File....73
9.3. Listing a Contact....74
9.4. Editing a Contact Group....75
9.5. Deleting a Contact Group....76
10. Survey Template....76

11. Help 77
12. Signing Out 78
12.1. Closing the BDB Survey 78
12.2. Signing Out 78

1. About this Guide

1.1. Document History

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

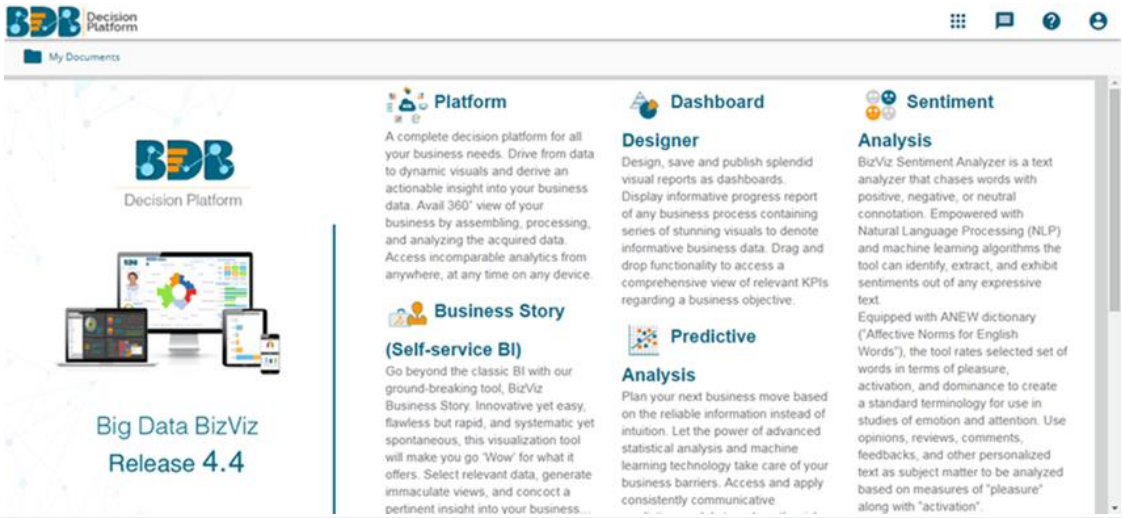
- BDB Survey can be accessed through a Web browser on Desktop, Tablet, and Mobile Phone.

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.

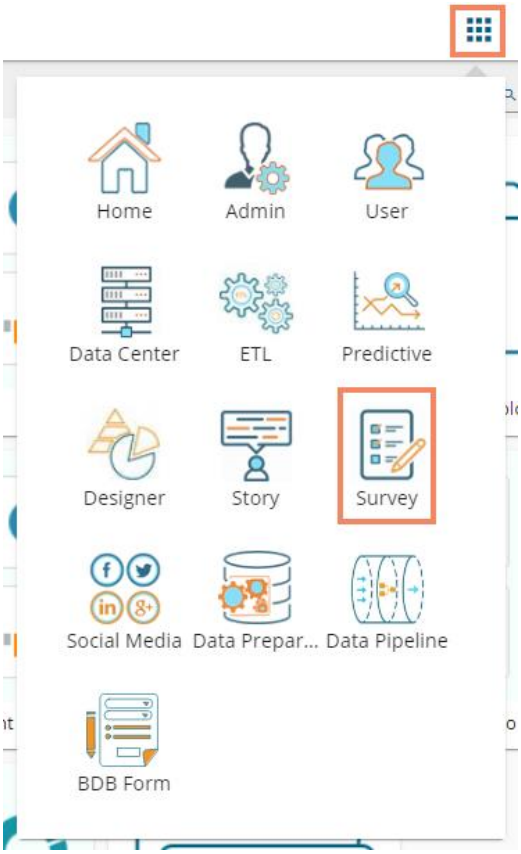
iv) The Platform homepage opens.



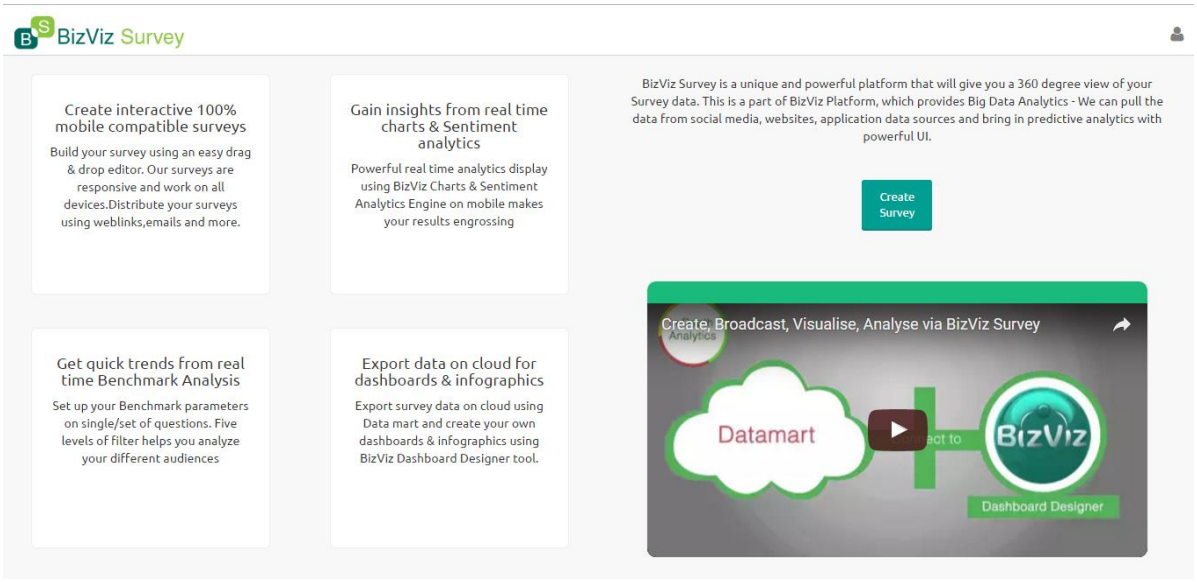
Note: The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.

v) Click the '**Apps**' menu to display a list of all the available plugins.

vi) Select the '**Survey**' plugin from the list.



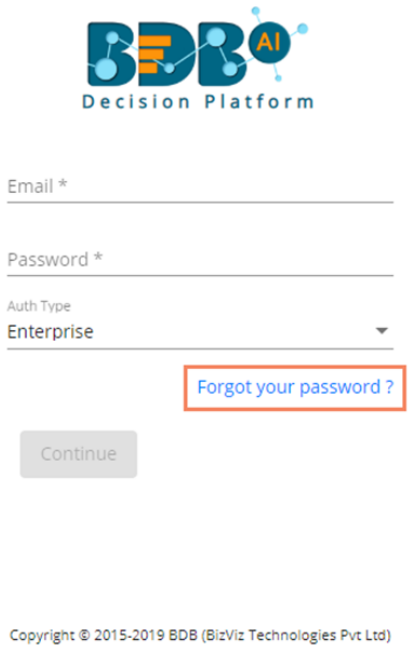
vii) Survey homepage opens in a new window.



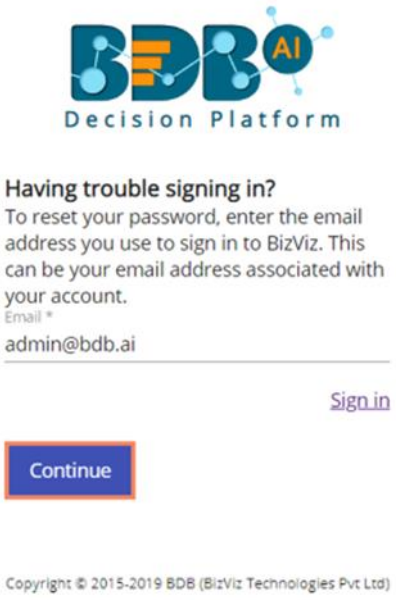
3.1. Forgot Password Option

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

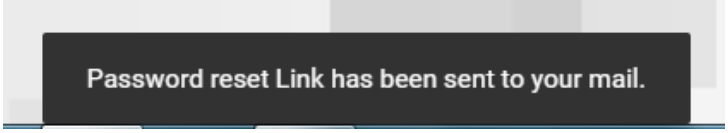
i) Navigate to the Login page.
ii) Click '**Forgot your password?**' option.



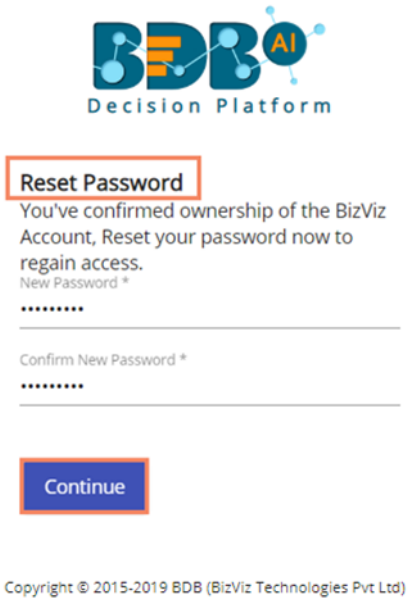
iii) A new window opens.
iv) Provide the email id that is registered with BDB to send the reset password link.
v) Click the '**Continue**' option.



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).



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.

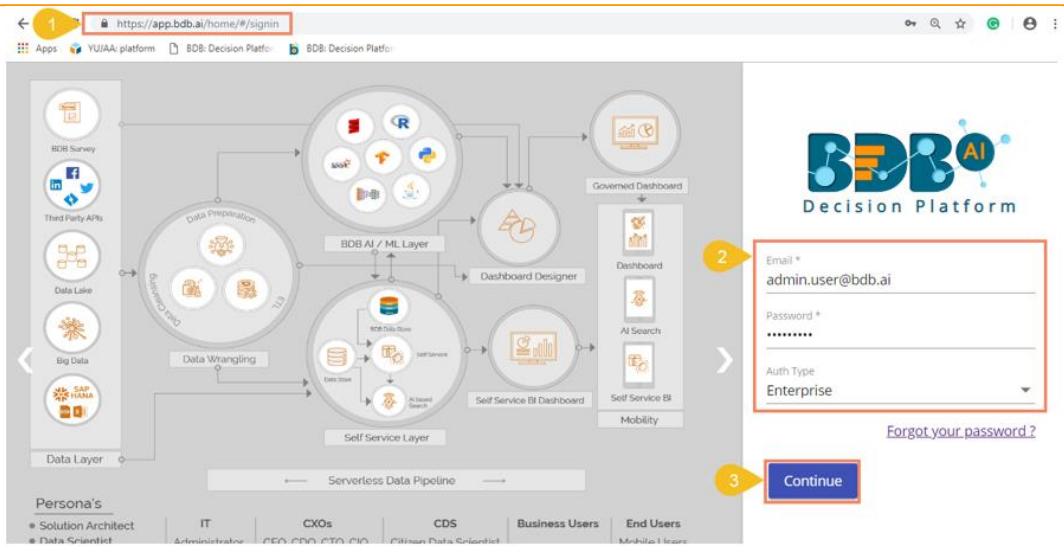


xii) The password for the selected BDB account gets reset.

3.2. Force Login

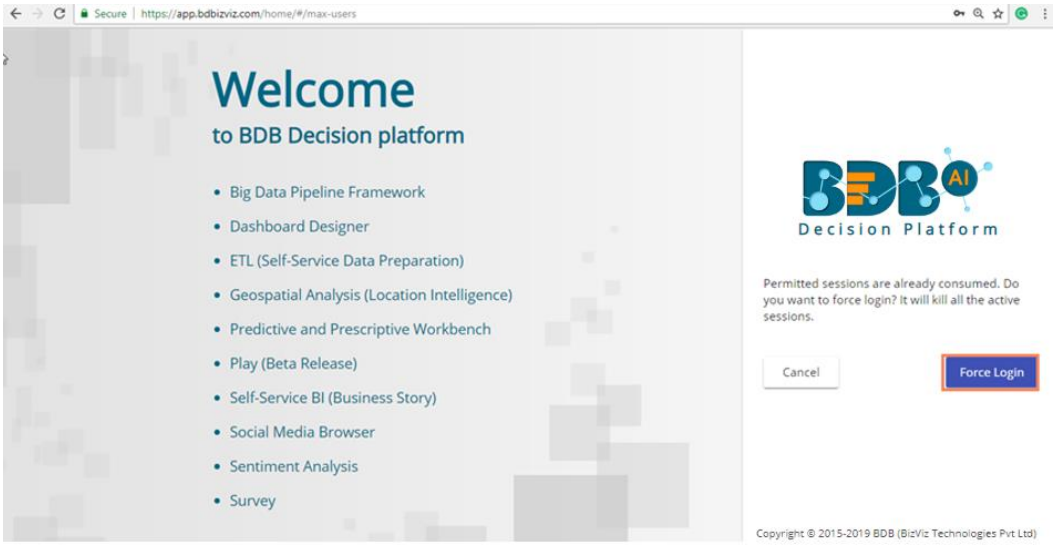
The '**Force Login**' functionality has been introduced to control the number of active sessions up to three. The users can access only 3 sessions at a time when they try to access 4th session a warning message displays to inform that the user has consumed the permitted sessions and a click on the '**Force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



iv) The user gets the following message if the user already consumes the permitted active sessions (3 sessions at a time).

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.

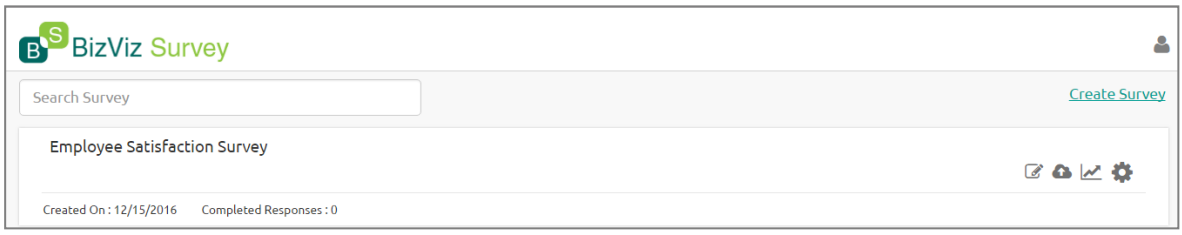
Note: The user can successfully login to the BDB Platform after selecting the '**Force Login'** option to log in the platform.

4. Creating a Survey

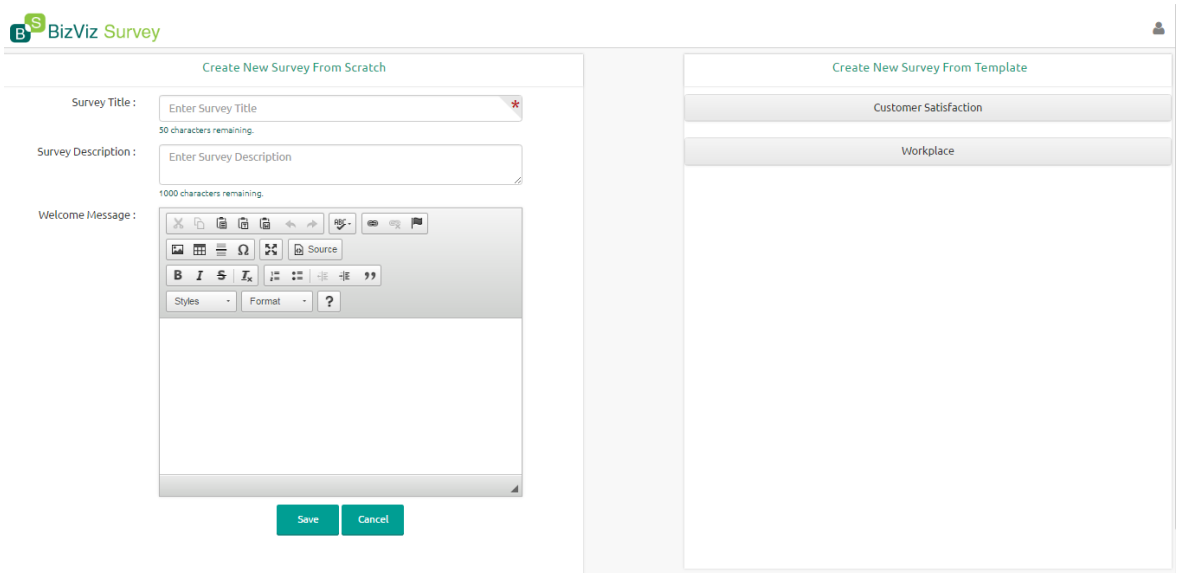
Building Survey is a simple and intuitive process with BDB Survey. It enables any user to create effective and flawless surveys in no time.

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.

i) Navigate to the Survey home page.
ii) Click the '**Create Survey**' option.



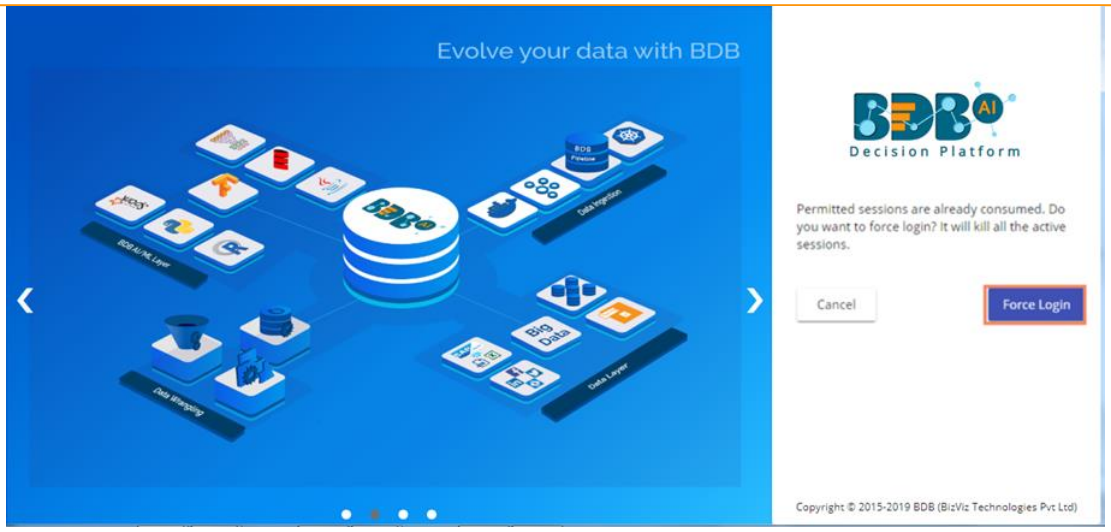
iii) A new page will open displaying the following options:
a. Create a New Survey from Scratch
b. Create a New Survey from Template



4.1. Force Login

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

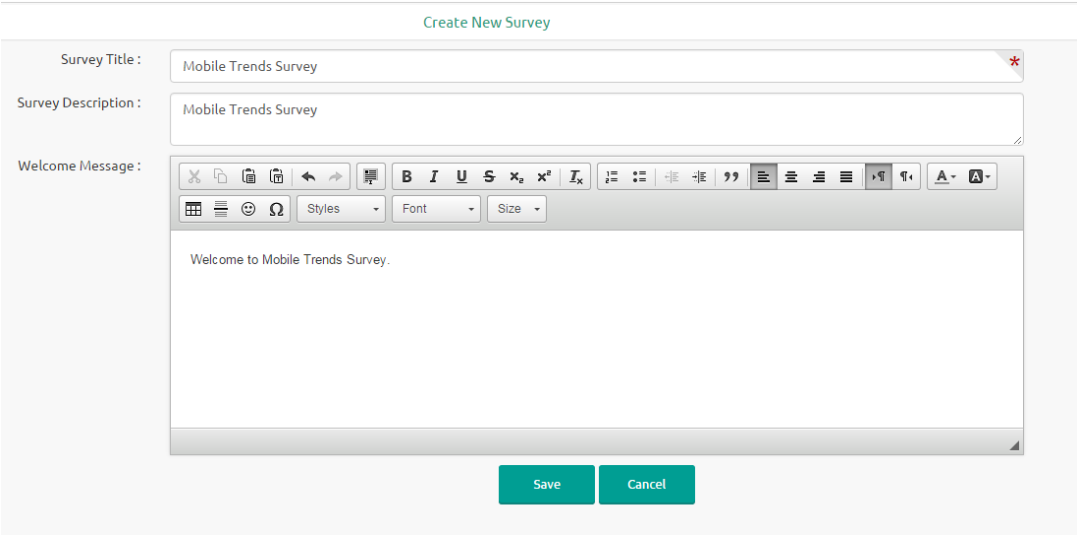
i) Users can access only three sessions at a time using different devices
ii) A warning message appears while accessing the 4th session to notify that the user has consumed all the permitted sessions and a click on the '**Force Login**' option would kill all those active sessions.



4.2. Creating a Survey using Scratch

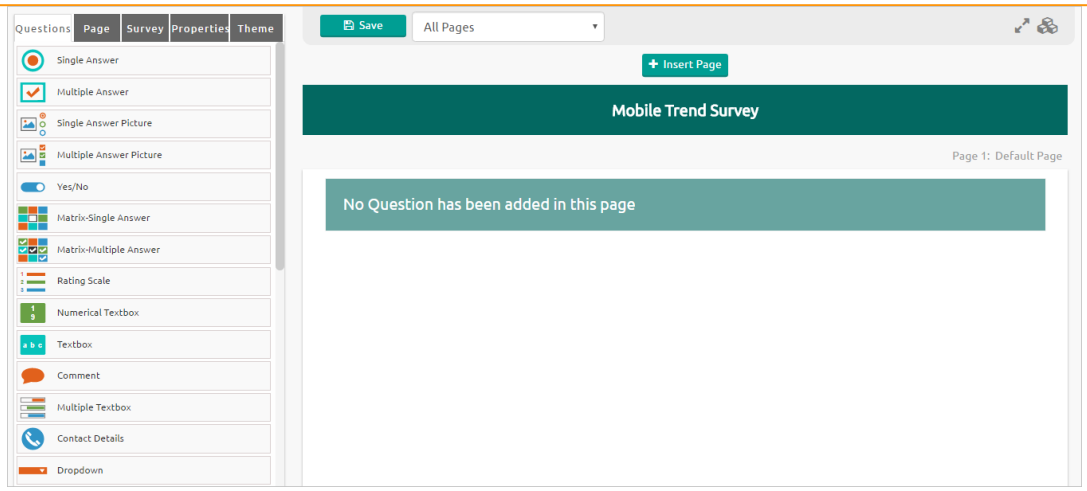
i) Fill in the following information:
   a. Survey Title
   b. Survey Description
   c. Welcome Message

ii) Click '**Save**.'



iii) A new page will open to design a survey questionnaire.

iv) The page will contain a menu row.



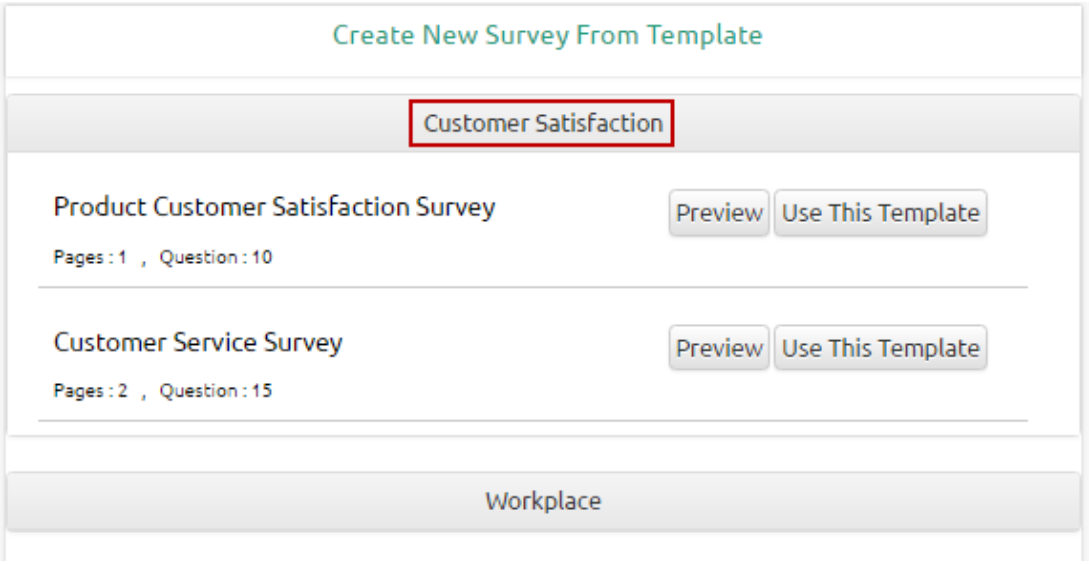
4.3. Creating a Survey using Template

i) Click on a survey name.

ii) All the available survey templates will be listed with the following details:

a. Preview

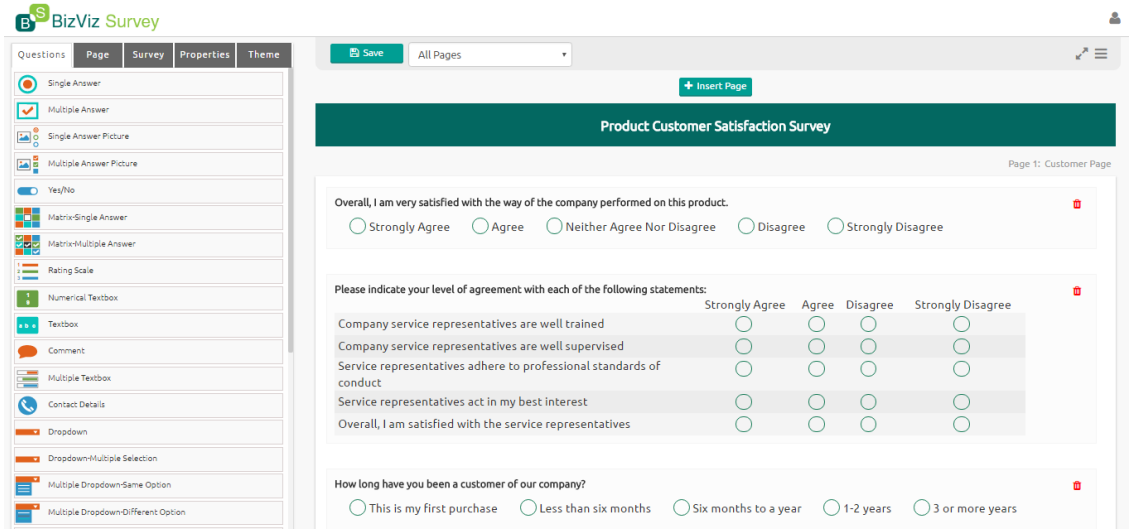
b. Use This Template



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:



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

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

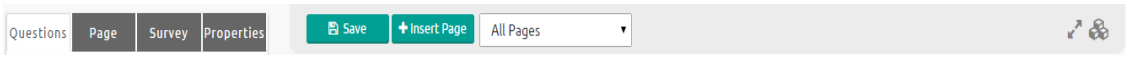
- **Other Related Options**

Icons	Name	Description
	Design Survey	Redirects users to design the survey questionnaire
	Publish Survey	Redirects users to publish the survey
	Analyze Result	Redirects users to see various analysis based on the collected survey responses
	More Options	Displays a list of options to be applied 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

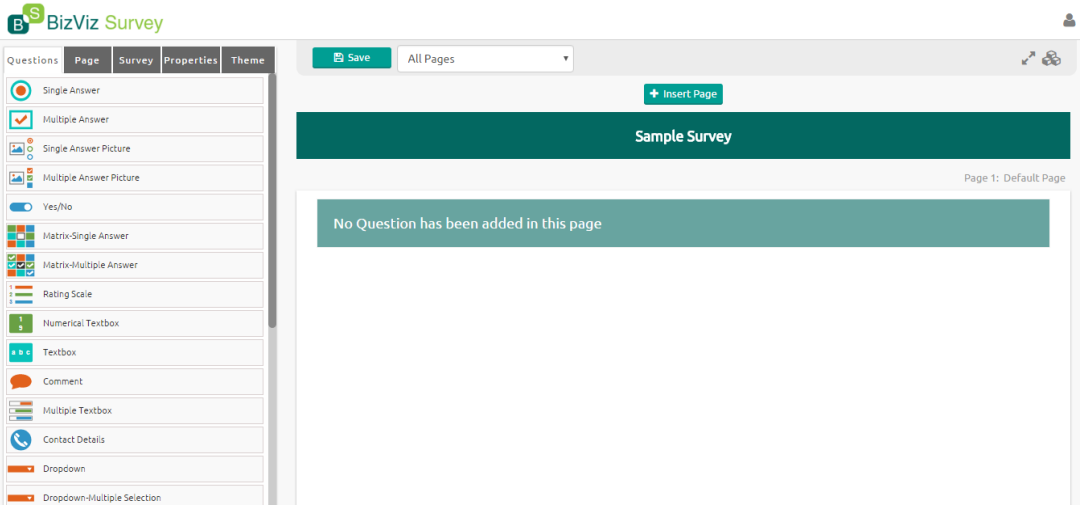


5.1. Questions

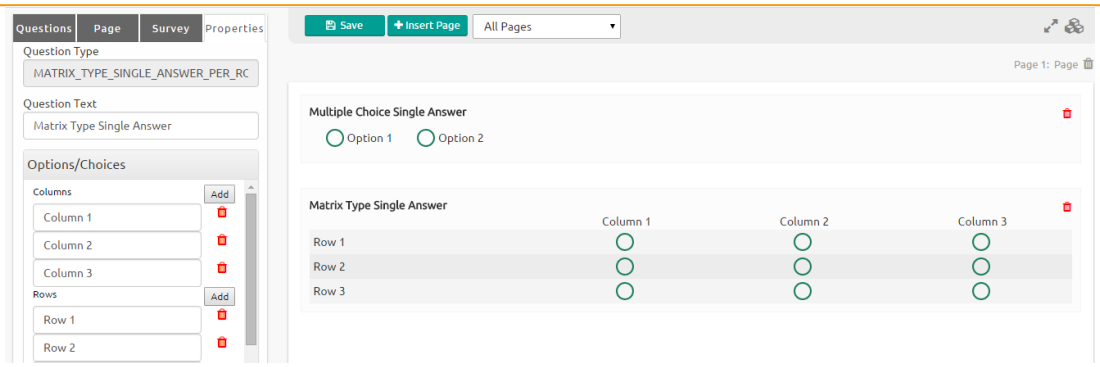
The survey is a carefully created questionnaire. The success of a survey depends upon easy to interpret and goal-oriented questions.

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.



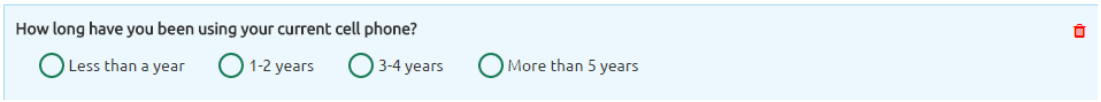
iv) Use drag and drop feature or Click on a question type to add it on the right pane of the page.
v) Rewrite in the given space to design to create a survey question.



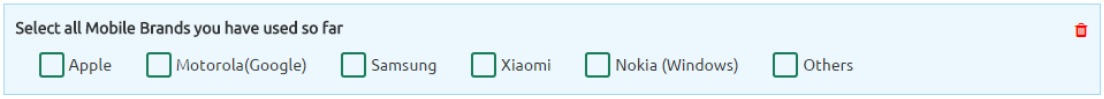
Available Question Types

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

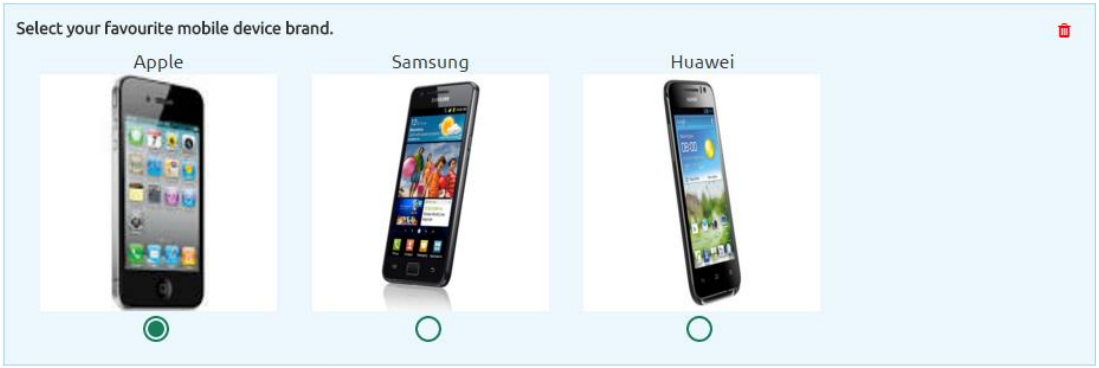
- **Single Answer:** This type of questions are essential questions to restrict respondents to a single option from all the provided options. Selecting a choice out of all the offered options will often classify them as members of a group. Example, selecting age group, religion, or gender.



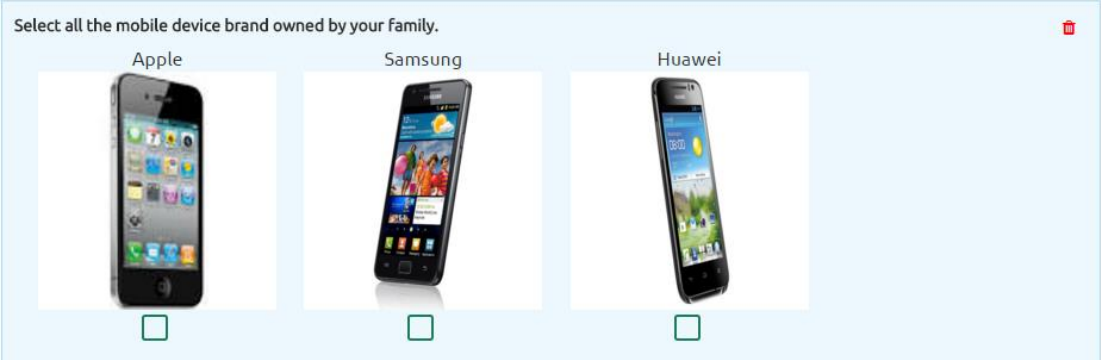
- **Multiple Answer:** Respondents can select one or more options from a list of answers to express their opinion. Multiple choice question type can be used, when there is a fixed number of options available for a question.



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



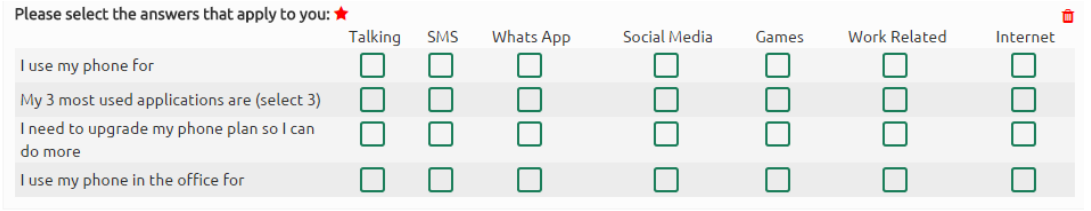
- **Multiple Answer Picture:** Use this type of question when you want respondents to select more than one picture from a list of picture choices.



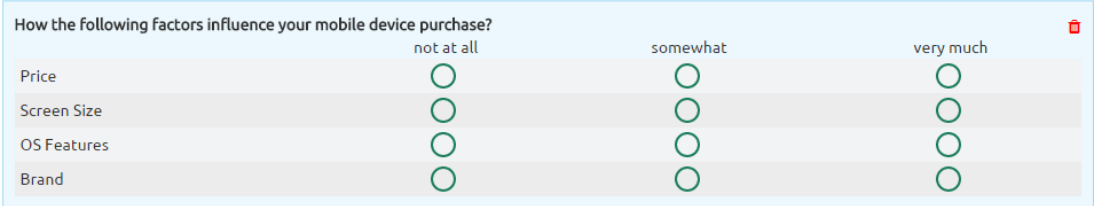
- **Yes/ No:** Use '**Yes/ No**' when there are only two possible options for answering the question. This type of question can also be used as end survey questions. '**Required**' validation can be applied to this question.

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

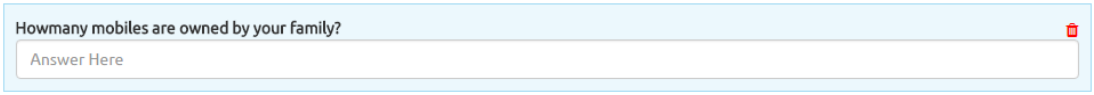
- **Matrix-Multiple Answer:** Use a Matrix-Multiple Answer question type, if you want respondents to evaluate one or more row items using the same set of column choices. You can set this type of matrix question to collect multiple answers.



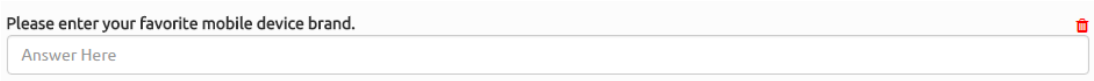
- **Rating Scale:** Questions formed under this type are generally to measure the opinions or attitudes of the desired audience. It is to rate a single aspect or thing alongside a spread-out range of possible choices/options. The rating scale is used to assign weights to respondents' answers. Rating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



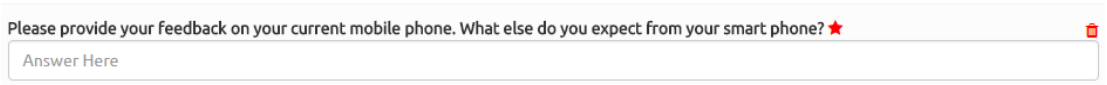
- **Numerical Text Box:** Numerical short responses can be collected by using this question type. The alphabetical keyboard is disabled to restrict the respondents to use only numbers.



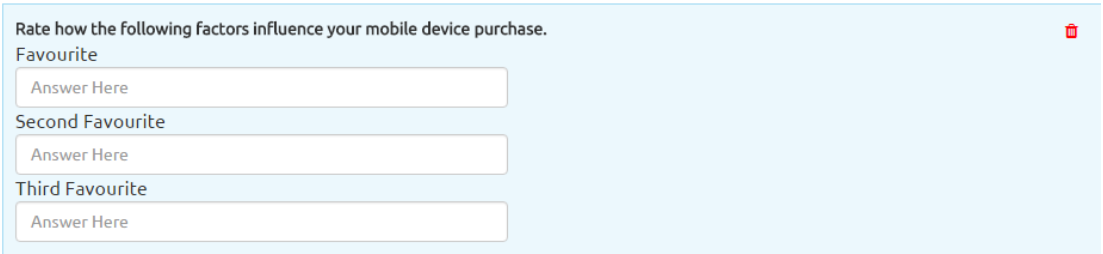
- **Text Box:** To collect single short text or numerical responses from the respondents the single Text Box can be used. It can be validated to turn it into a compulsory question**. E.g.,** Pin Code, Designation.



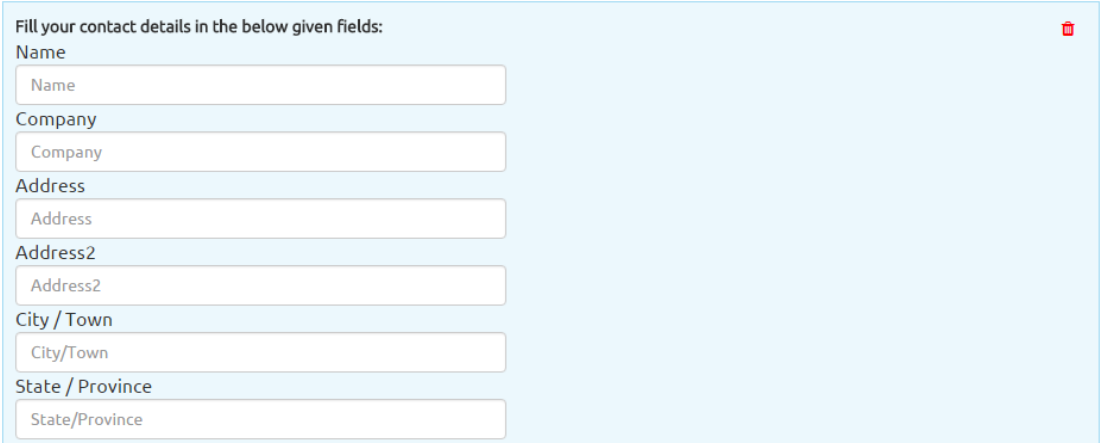
- **Comment:** It is difficult to provide specific pre-set answer options to open-ended survey questions; therefore, respondents are required to type their responses into a comment box. Respondents are free to choose the wording and length of responses. Collected responses can then be viewed separately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

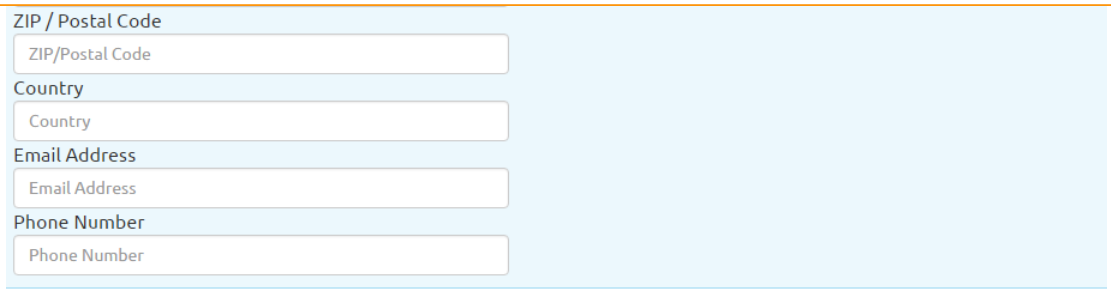


- **Multiple Textbox:** This question type is used to collect multiple short responses for a single question. It includes both, numerical and textual responses. The user can specify the answer length and '**Required**' validation can be applied to this question type.

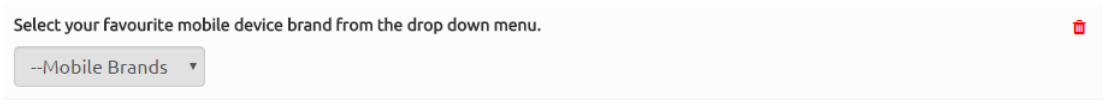


- **Contact Details:** Use this question type to collect basic contact details from the respondents. There are ten predefined fields given under this question which can be enabled or disabled as per the need of the survey.

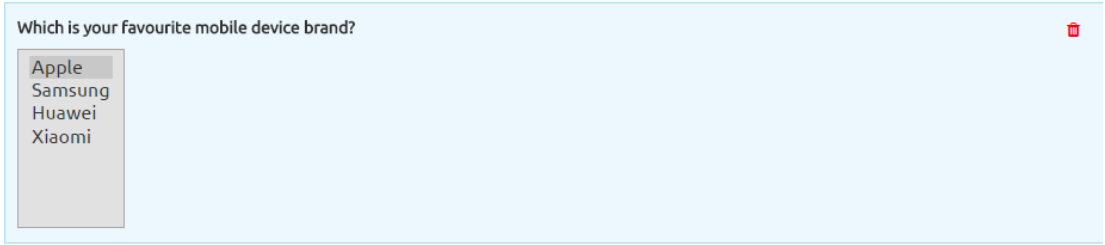




- **Dropdown:** Use '**Dropdown**' when you want respondents to select only one answer from a list of answer choices. Inserted details for the '**Question Text**' and '**Select Option**' title for the dropdown menu will be displayed on the workspace (as shown below).

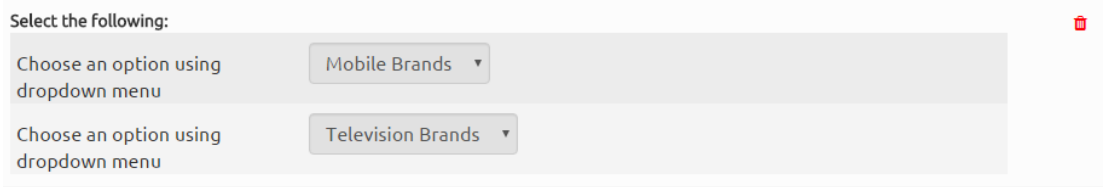


- **Dropdown Multiple Selection:** Use '**Dropdown Multiple Selection**' when you want respondents to select multiple answers from a list of answer choices.

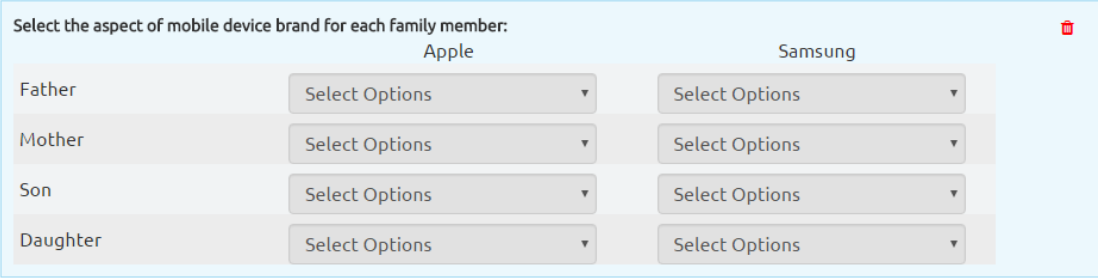


- **Multiple Dropdown-Same Option:** Use '**Multiple Dropdown-Same Option**' when you want respondents to answer multiple questions using the same drop-down options from a list of option choices.

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



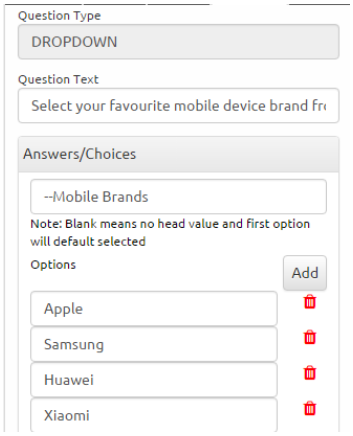
- **Matrix Dropdown-Same Option:** Use this question type when you want respondents to select an option from matrix drop-down and collect multiple answers for the chosen column. Category of the columns and options provided for drop-down remains the same.



- **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)

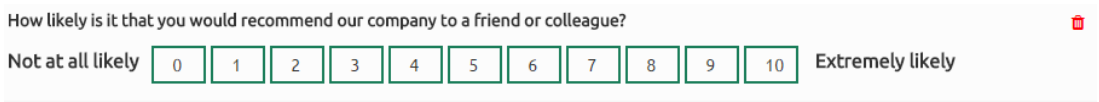


b. The user can not avail the drop-down options from the workspace. '**Dropdown options**' will be enabled only on the Preview page or while attempting the survey.

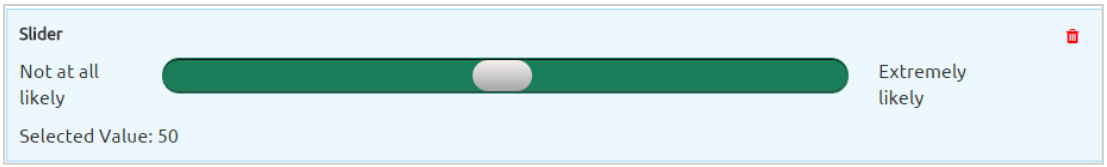
c. If '**Select Option**' is kept blank, then it will take the first option by default from the drop-down menu.

- **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.

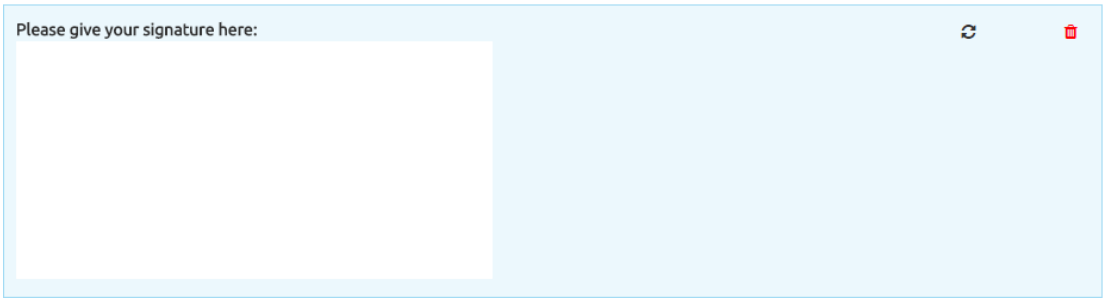
- **Net Promoter Score:** Use '**Net Promoter Score**' when you want respondents to give a specific score out of 10 for the chosen option.



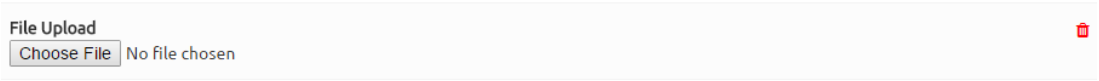
- **Slider:** Use '**Slider**' when you want respondents to give a specific score between selected Minimum and Maximum value. The value is given to each step, Minimum value, and Maximum value should be preselected.



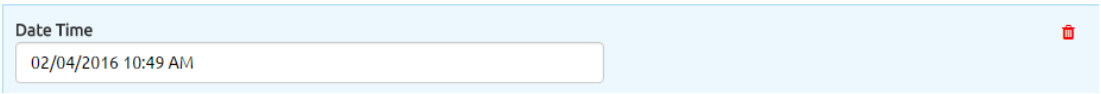
- **Digital Signature:** Use this option when you want respondents to give their digital signature. Respondents can provide a digital signature through curser by holding the left click. Respondent can use left click of the cursor to provide a digital signature in the given space.



- **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.

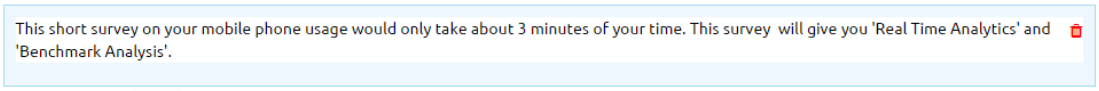


- **Date/ Time:** Use this option when you want respondents to provide date and time. The user can access this feature from survey designer page, preview screen and attempt page. By clicking on the space given for date and time, the user will get a calendar to provide a date. Time will be taken based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



- **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.



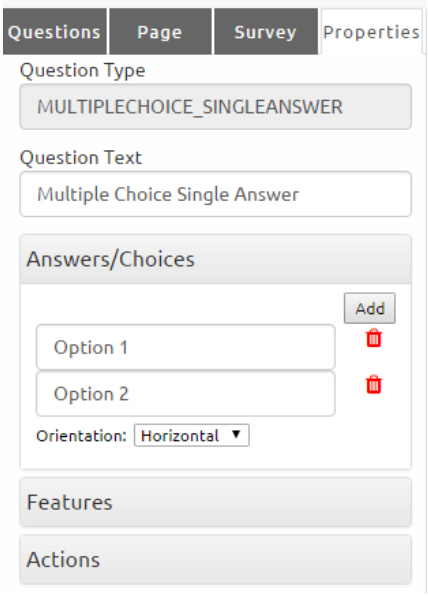
Note: Delete option is provided with each question type to remove any inserted question from the survey page.

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:

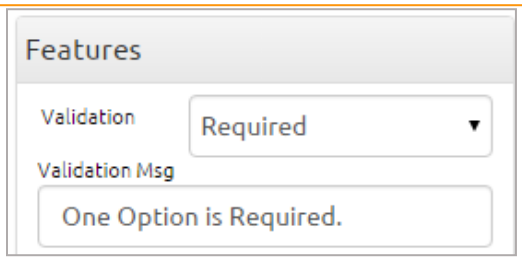
1. Select a Question Type from the '**Questions**' menu
2. Click on the inserted Survey Question
   '**Properties**' will display question specific properties. Such as:



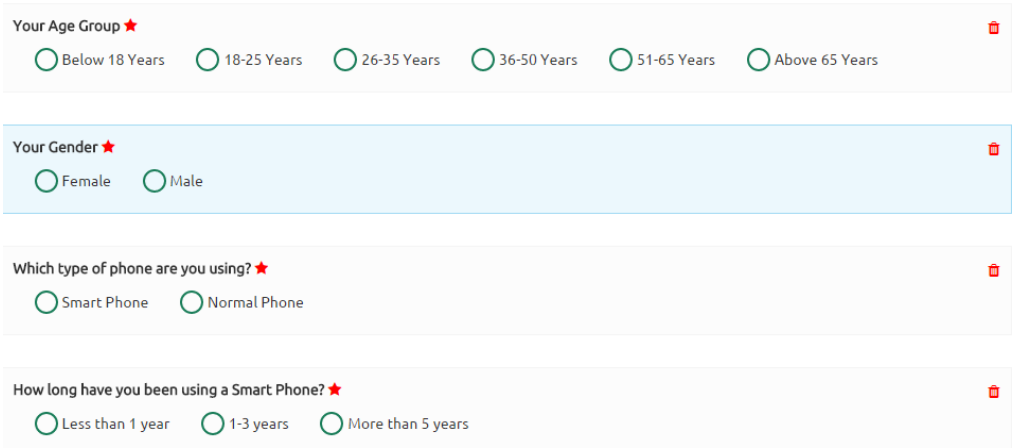
i) **Question Type:** Question type is pre-selected
ii) **Question Text**: Question Text can be inserted or modified
iii) **Options**: Options can be added, modified, and deleted
iv) **Orientation**: **Horizontal** or **Vertical** orientation can be selected from the drop-down menu
v) **Features:** Features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



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



- **Show Comment Box**

  Comment Box is an optional feature provided under properties.

  i) Click '**Features**' provided on the left side of the '**Properties**' page

  ii) Select '**Show Comment Box**' option by check marking the box

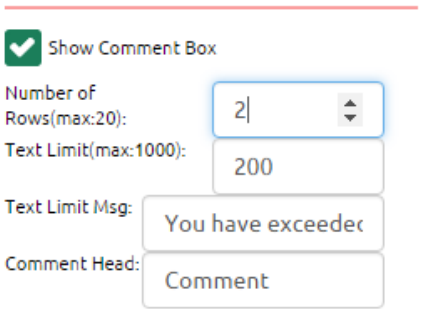
  iii) Fill in the following information:

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

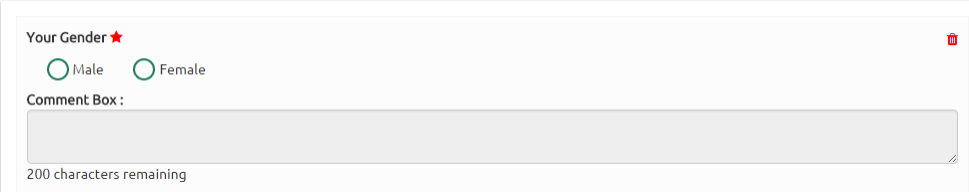
  b. **Text Limit**: Set text limit using the '**Stepper**' button

  c. **Text limit message**: Enter a message to display when the text limit is exceeded

  d. **Comment Head**: Enter a heading for the inserted comment box



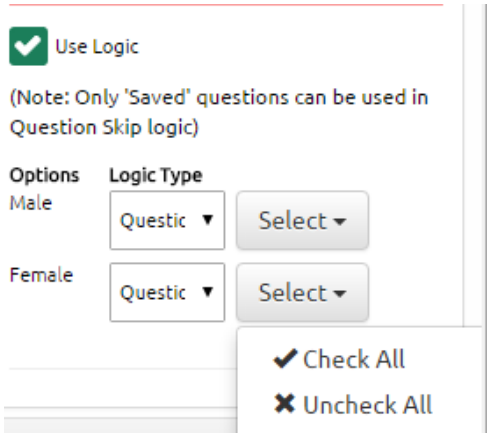
iv) A Comment Box will be added below the selected question



- **Use Logic**

  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.



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

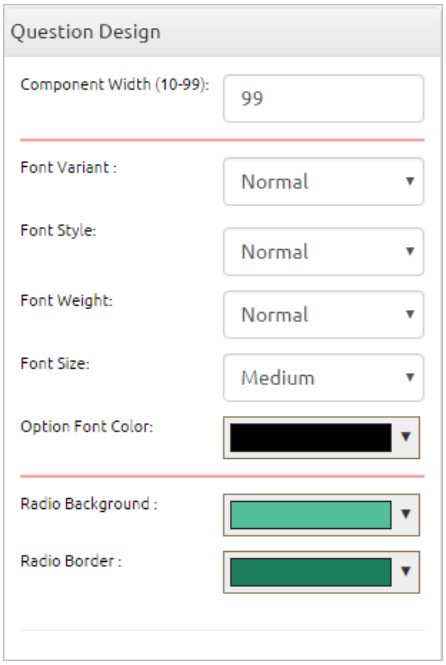
iv) **Font Weight:** Select an option from the drop-down menu
a. Normal
b. Bold

v) **Font Size**: Select an option from the drop-down menu

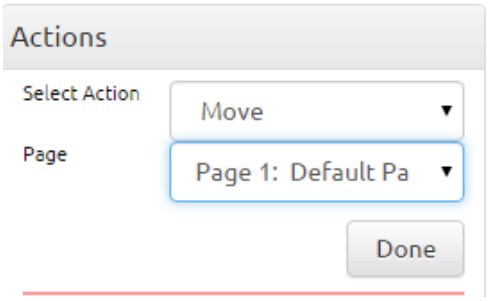
vi) **Option Font Color**: Set font color using the available color menu

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



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.



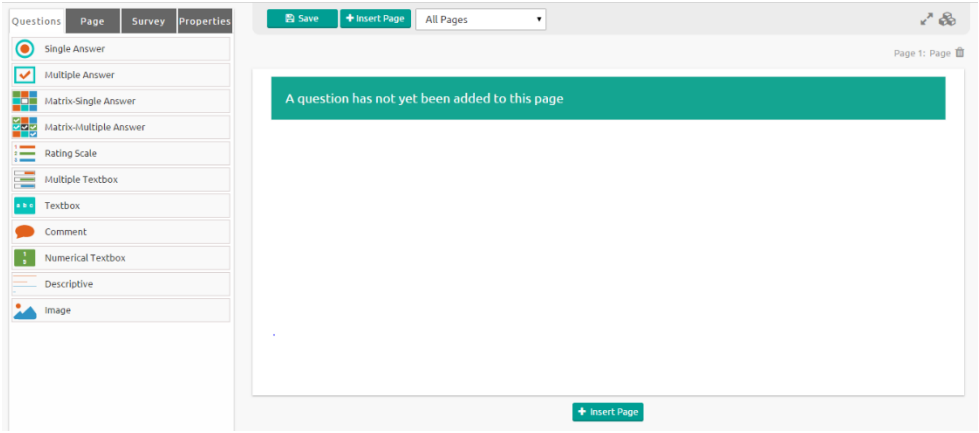
5.3. Inserting a New Page

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

1. Insert Page Option at the top of the screen

i) Click on the '**+ Insert Page**' option from the Menu Row
ii) A new page will be inserted **before** the existing page

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



Note:

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

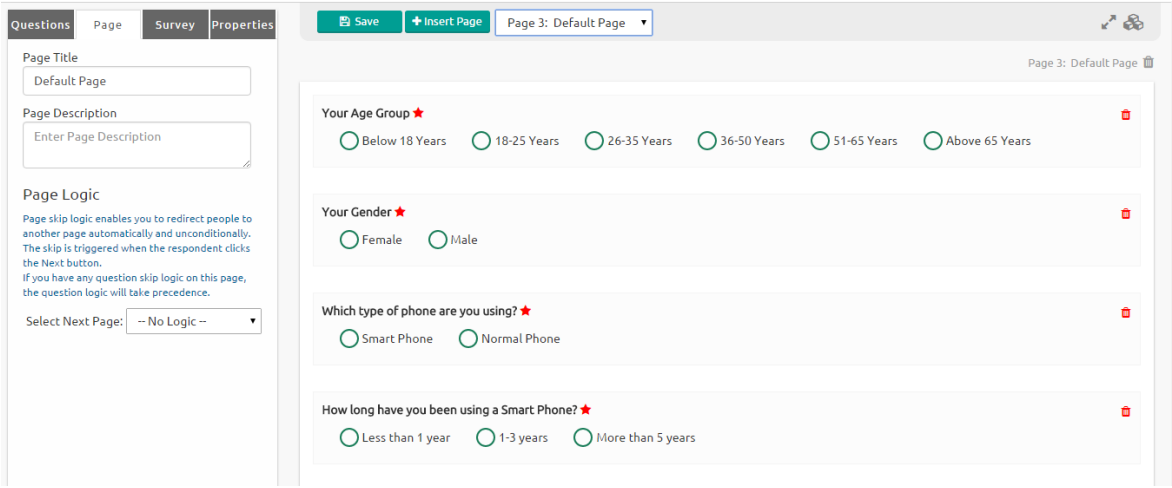
b. The user can delete a page by clicking on the '**Page Delete**' option

provided at the top right side of each page.

5.4. Page: Editing an Existing Page

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

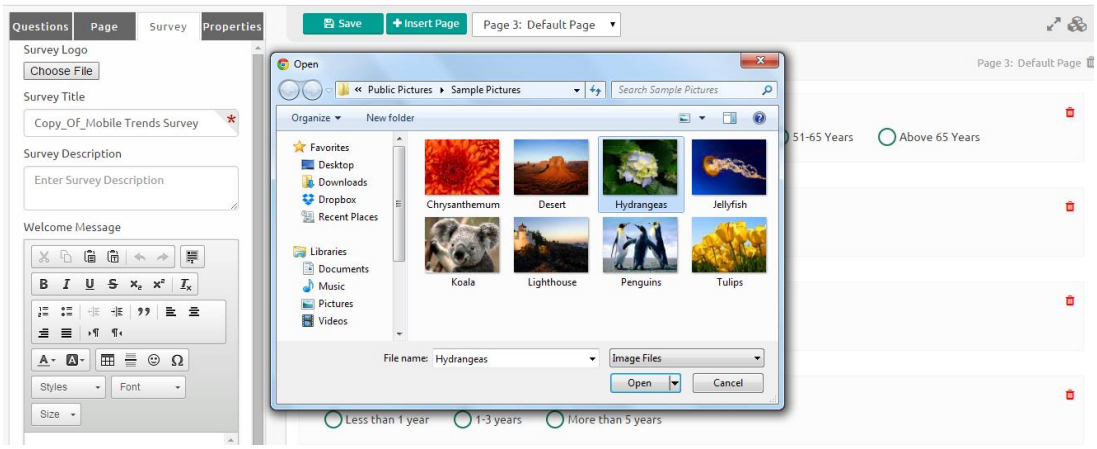


5.5. Survey Option

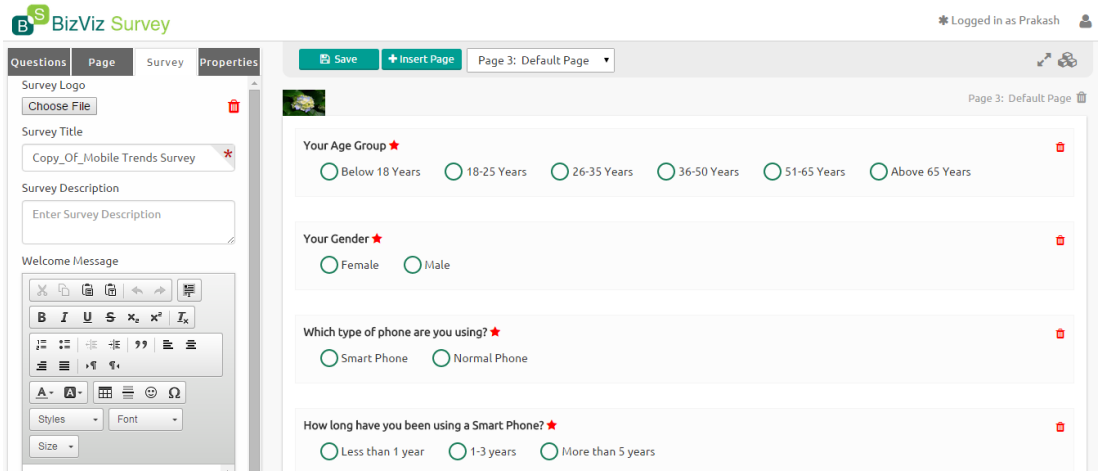
Survey option enables the user to insert a Survey Logo and edit/modify the '**Create Survey**' screen.

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.



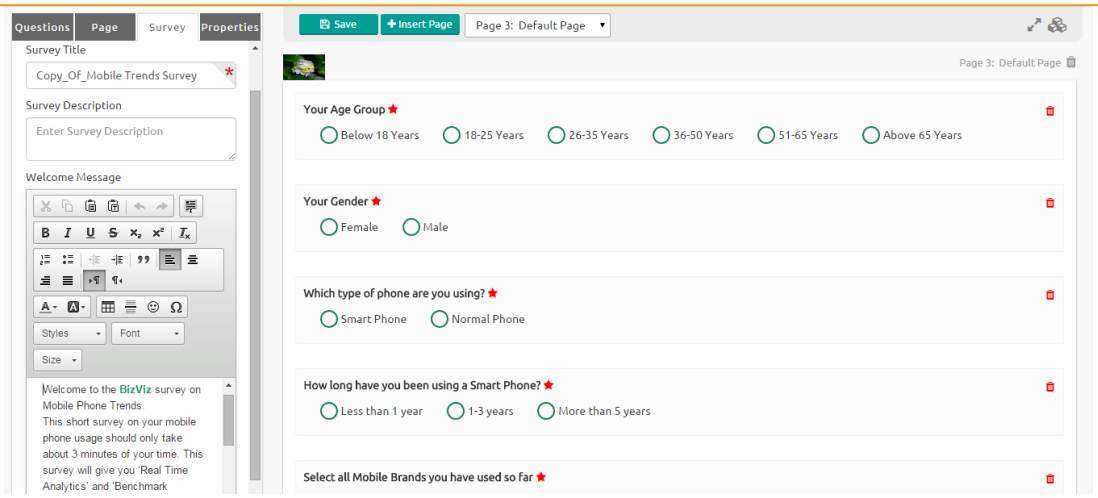
vii) Click on the '**Delete**' option provided next to the '**Choose File**' option to remove the Survey Logo.

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)

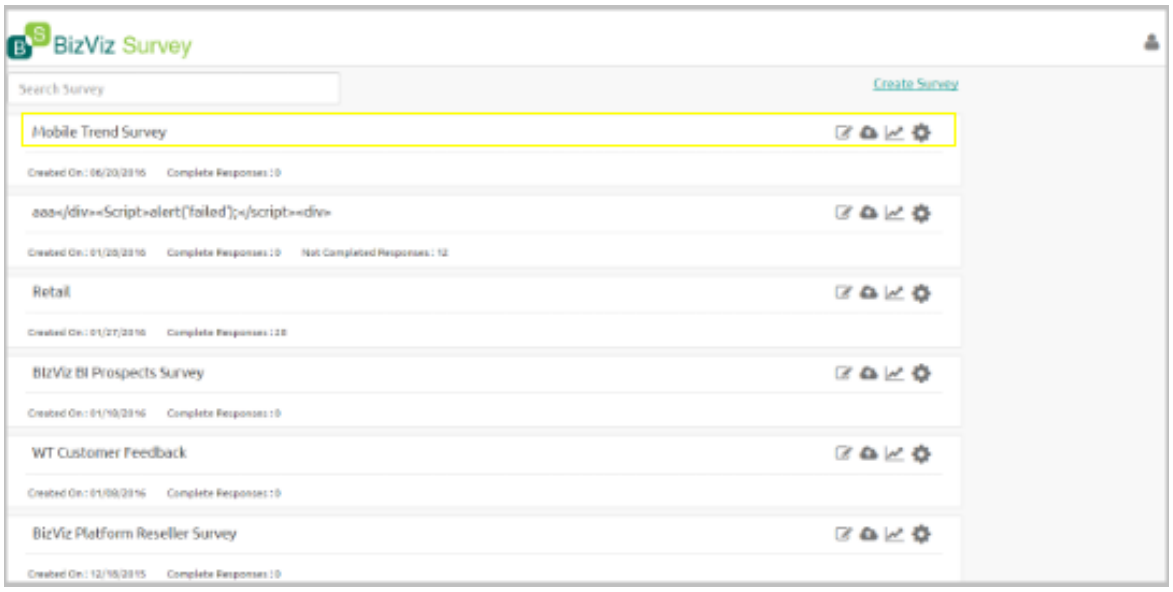


5.6. Saving a Survey

i) Click on the '**Save**' option from the Menu Row to save the changes or modifications

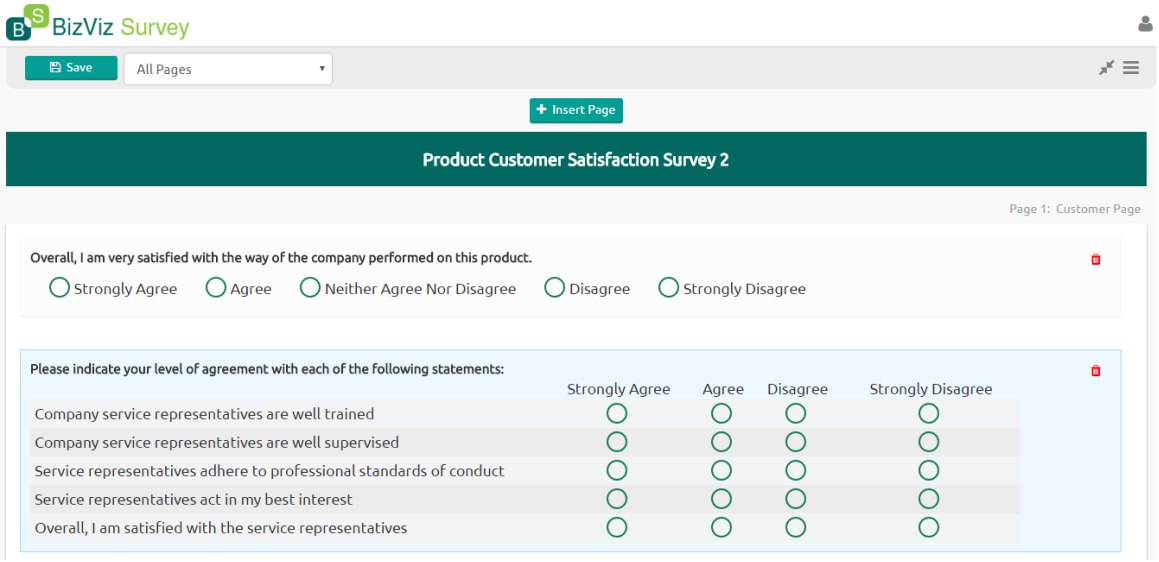
ii) All the changes will be saved in the survey

iii) After all the modifications are successfully saved, the '**Questions**' option will open by default

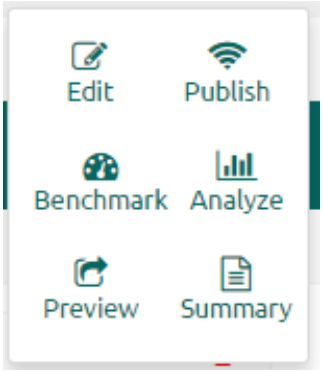


Note: While inserting questions to a survey, it will save only those questions for what '**Save**' option was clicked.

- **Other Related Options:**
  - '**Full Screen**' icon displays the survey questions in full screen (as shown in the following image):



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

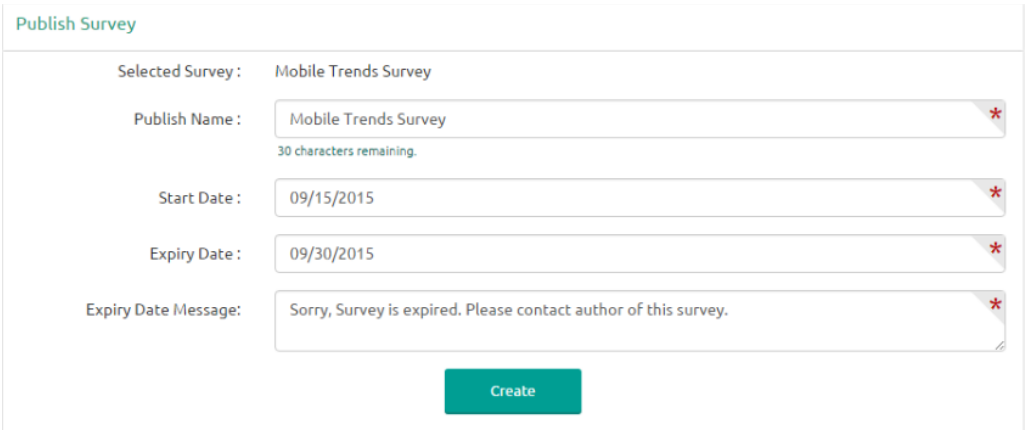
iii) Users will be redirected to the '**Publish Survey**' page.

iv) Fill in the following information:

- Publish Name

- Start Date
- Expiry Date
- Expiry Date Message

v) Click '**Create**.'



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

- **Other Related Options:**

Options	Task Assigned
	Add Web Link Collector
	Add Email Collector
	Edit Publish
	Delete Publish

6.2. Collector(s): Accessing Collector Options

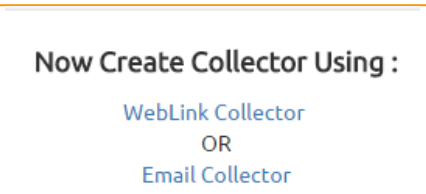
The collector is an integral part of '**Publish Survey**.' The collector is an online link that can be sent to the end users. Collectors are used to record collected responses from the recipients that can then be used for in-depth analysis.

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:



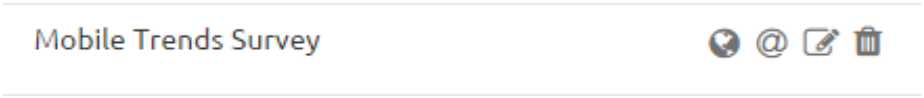
iii) The user can select any one option by a click on it

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 (and) can be used to create a new collector



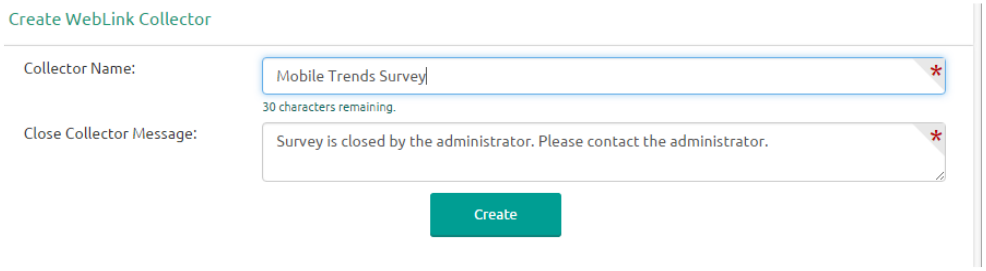
6.3. Creating a Web Link Collector

i) Click '**Weblink Collector**' or '**Add Web Link Collector**' option

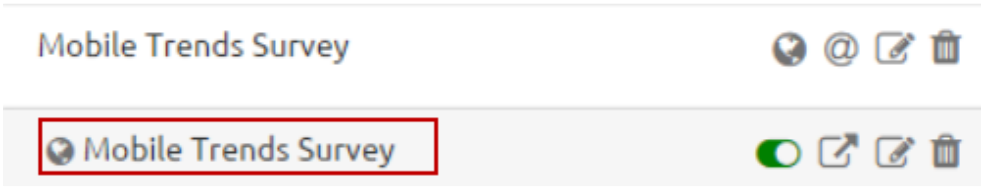
ii) '**Create Weblink Collector**' page will be displayed

iii) Enter a name for the collector (Maximum limit given is of 50 characters)

iv) Click '**Create**'



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



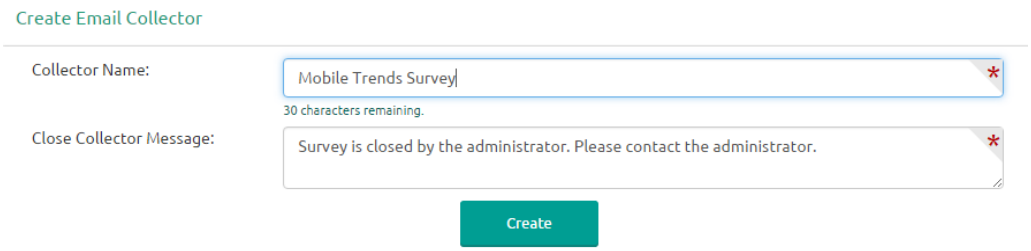
- **Related Options:**

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

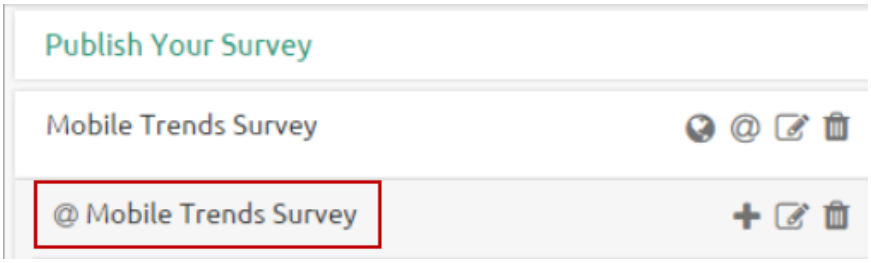
	Delete the Weblink Collector	Deletes the created collector

6.4. Creating an Email Collector

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



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



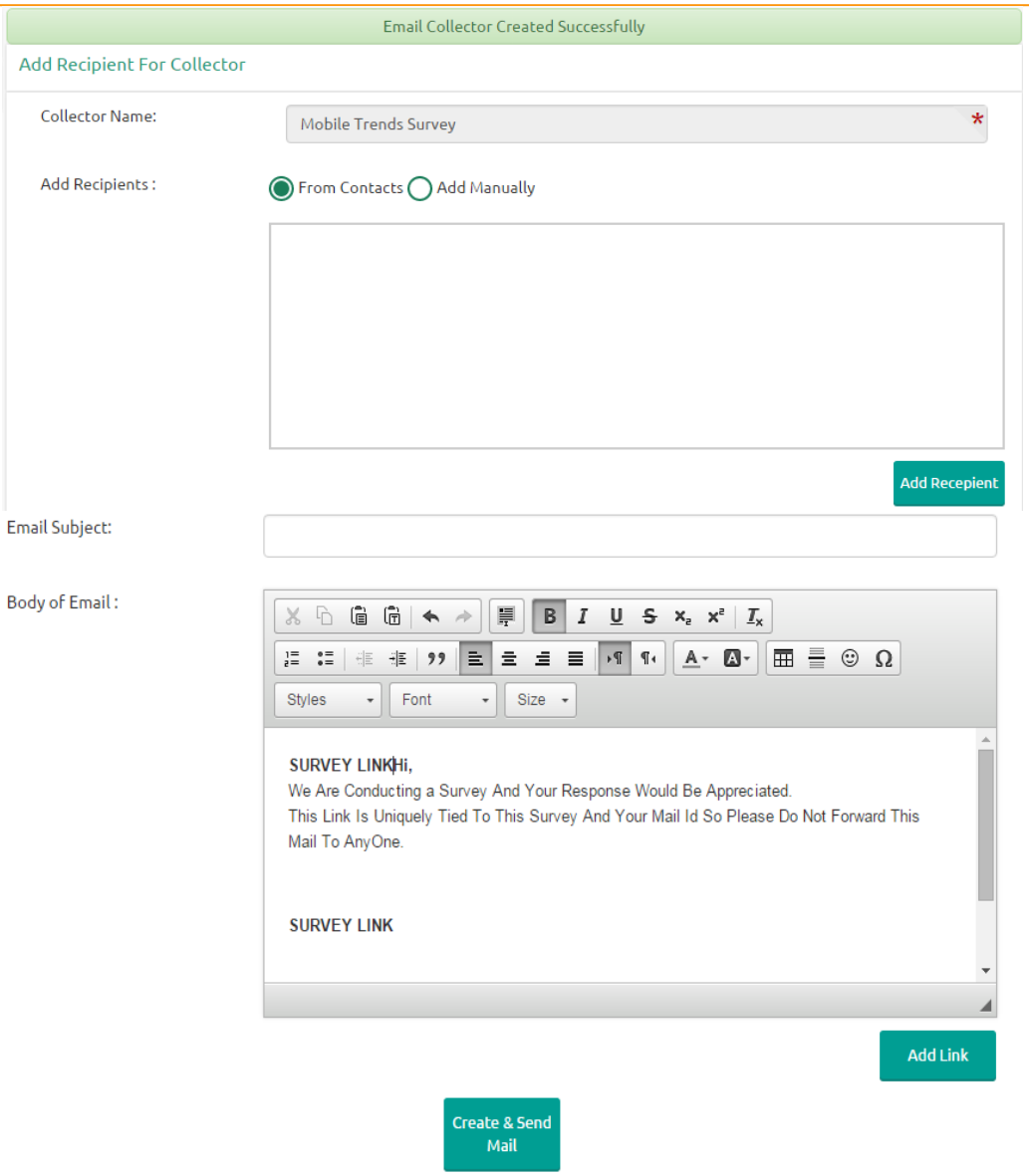
- **Related Options:**

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

6.4.1. Adding Recipients for Email Collector

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

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

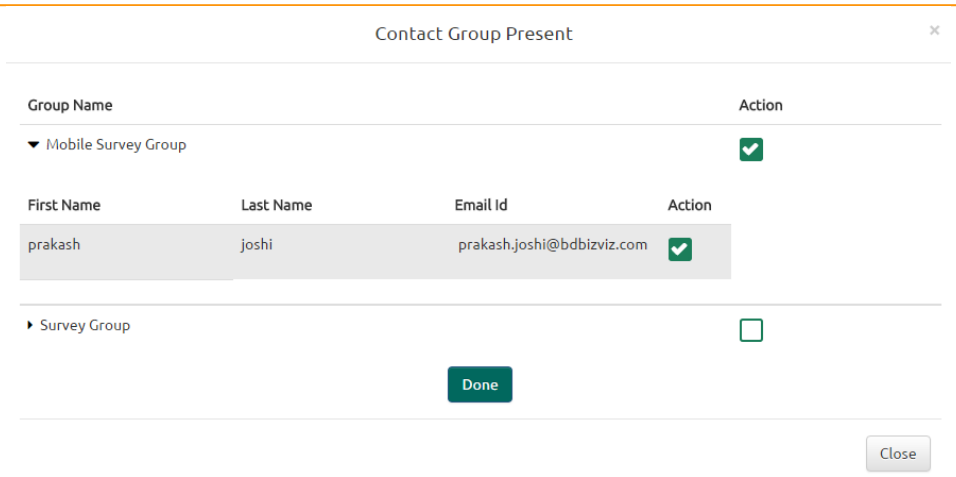


vi) A mail will be sent to the added recipient(s)

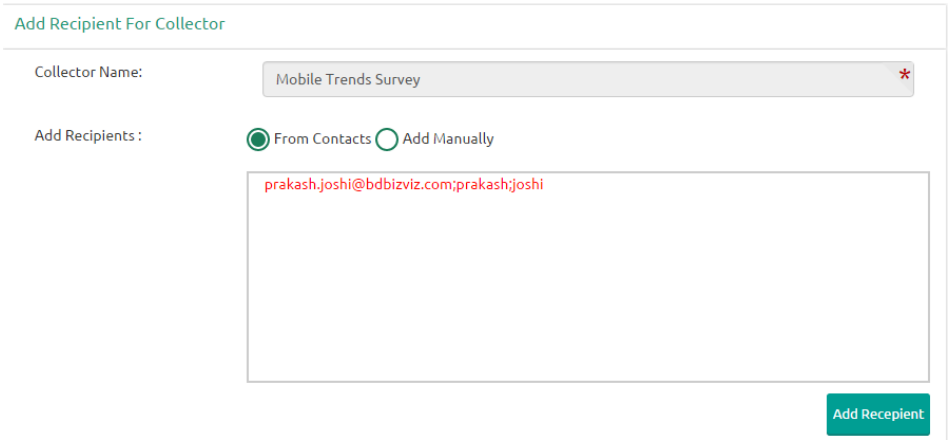
Note: Collector name displayed on the 'Add Recipients for Collector' page cannot be changed.

1. **Adding Recipients from Contacts**

i) Navigate to the '**Add Recipients for Collector**' page.
ii) Select '**From Contacts**' option.
iii) Click the '**Add recipients**' option provided below the box.
iv) A new window entitled '**Contact Group Present**' will be displayed.
v) Click the button provided on the left side of a Contact Group Name.
vi) Contact details will be displayed below the contact group name.
vii) Select 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**.'



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



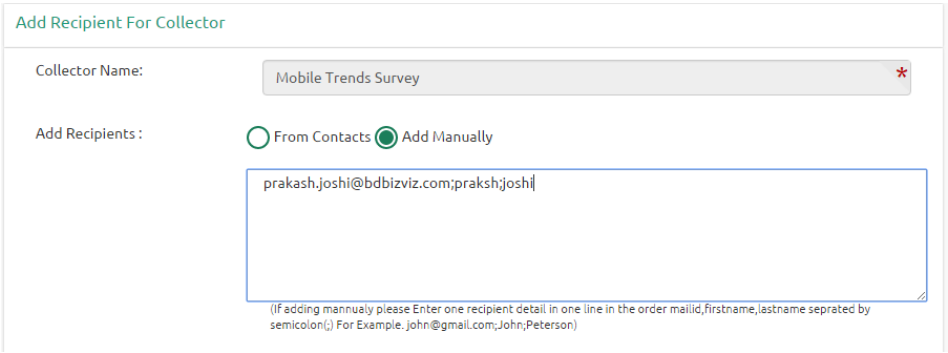
2. Adding Recipients Manually

i) Navigate to the **'Add Recipients for Collector'** page

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

iii) Manually add recipients' details into the given space

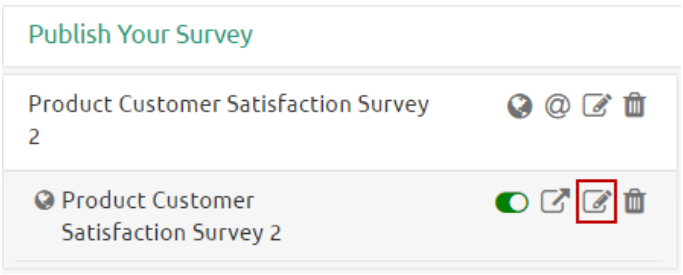
iv) Follow the below mentioned format to add the recipient name: email@email.com; first name; last name



6.5. Editing Collector(s)

i) Navigate to the '**Publish Your Survey**' list.

ii) Click '**Edit**' provided next to a Collector name.

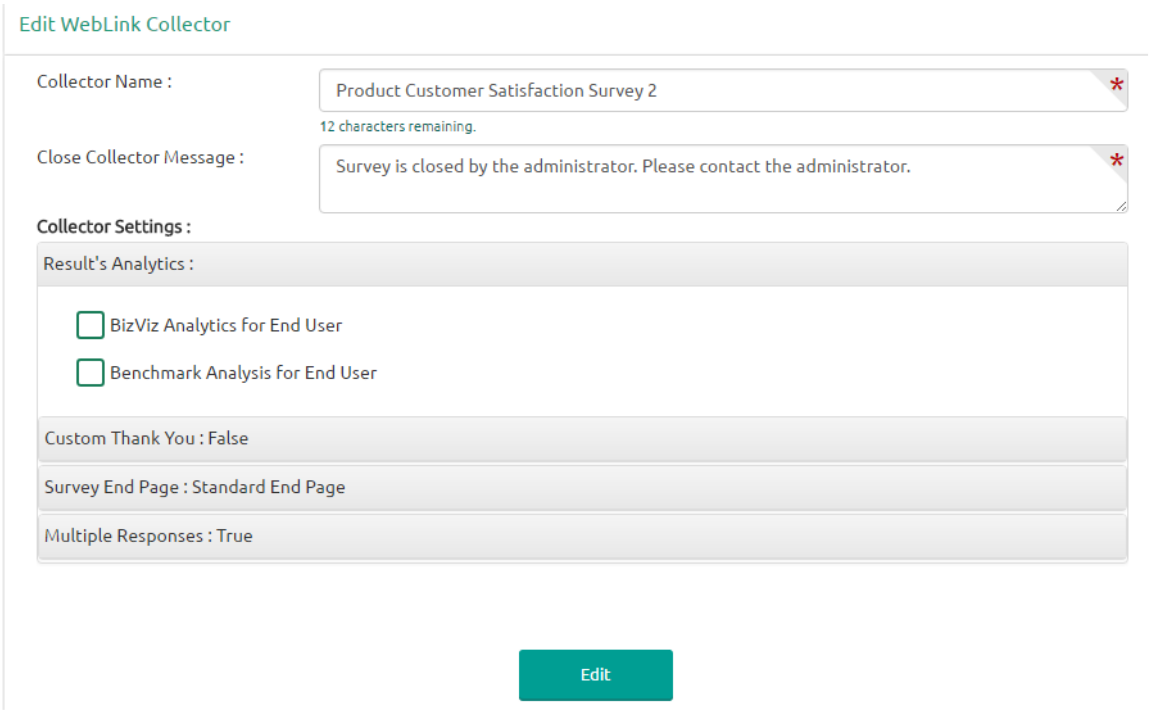


iii) '**Edit Collector**' option will be displayed on the right pane of the screen.

iv) The following information can be edited for a collector:

- Collector Name
- Close Collector Message
- Collector Settings

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



- **Editing Collector Settings**

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

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

i) Navigate to the '**Edit Collector**' Screen.

ii) Select '**BizViz Analytics for End User**' option by check marking the box.

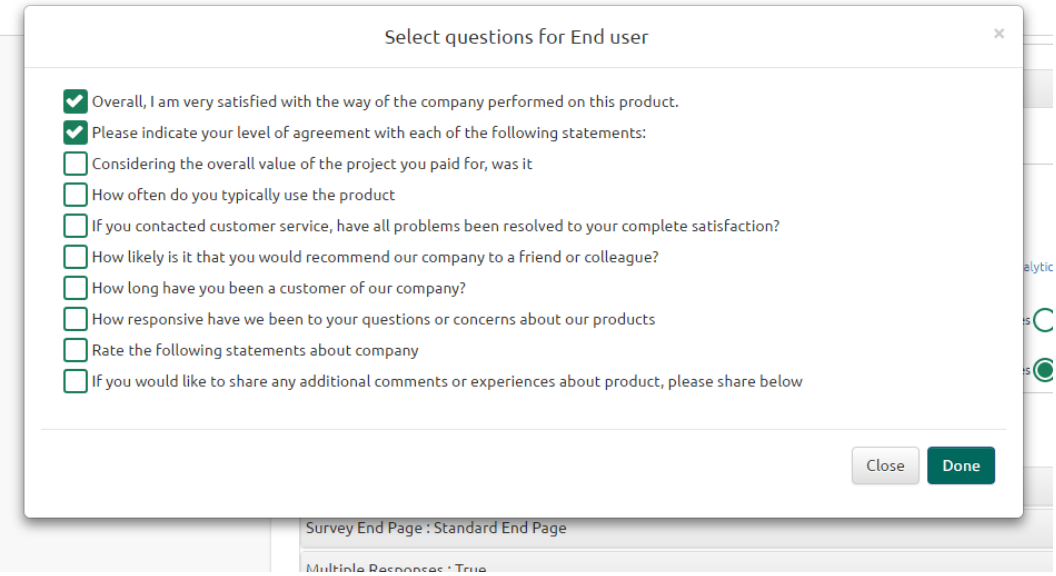
iii) Carefully select the following details:

a. **Select Questions**: Select a question from the drop-down menu to apply BizViz Analytics.

i. Click '**Select questions for End user**' option.

ii. A pop-up window will open containing the list of questions.

iii. Select a question by check marking the box.
iv. Click '**Done**.'

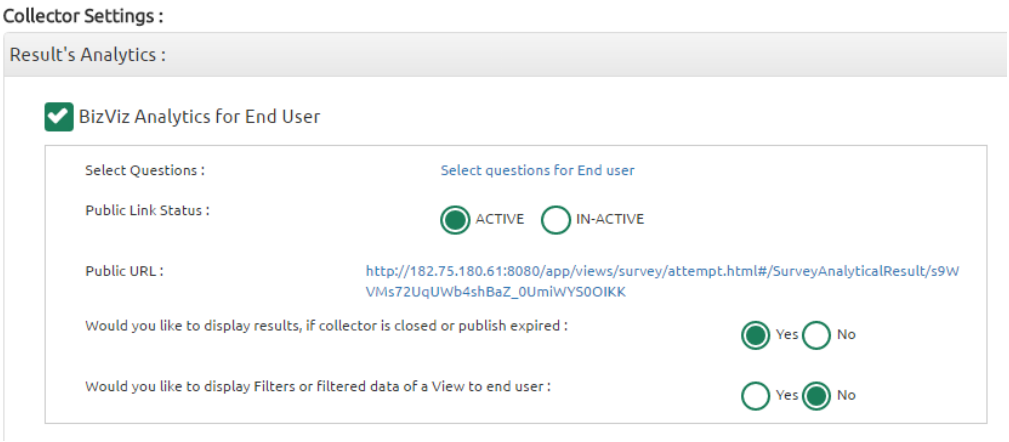


b. Public Link Status:
   i. Select '**ACTIVE**' option to enable the link
   ii. Select '**IN-ACTIVE**' option to disable the link

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

c. Display Result Option:
   i. 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



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

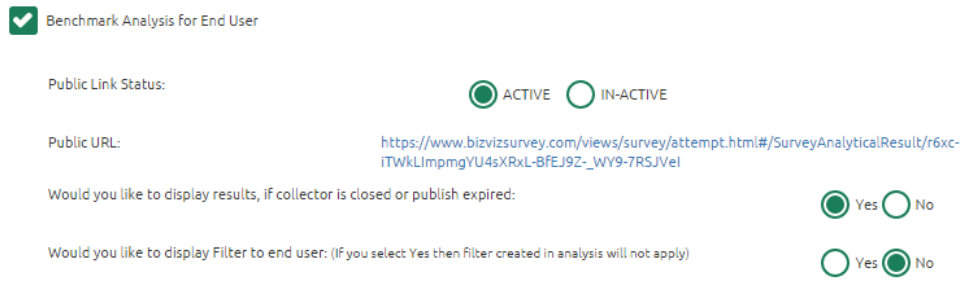
Note: '**Public URL**' link will be displayed below the '**Public Link Status**,' (If '**ACTIVE**' option is selected)

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:

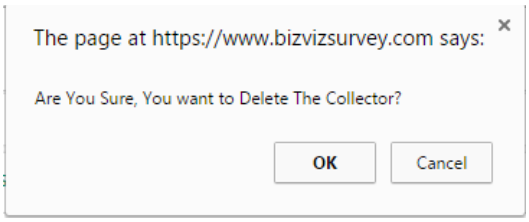
i. Choose either of the choices out of '**Yes**' or '**No**' options
ii. Selecting '**Yes**' will display the applied filters to the end user



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**' 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.

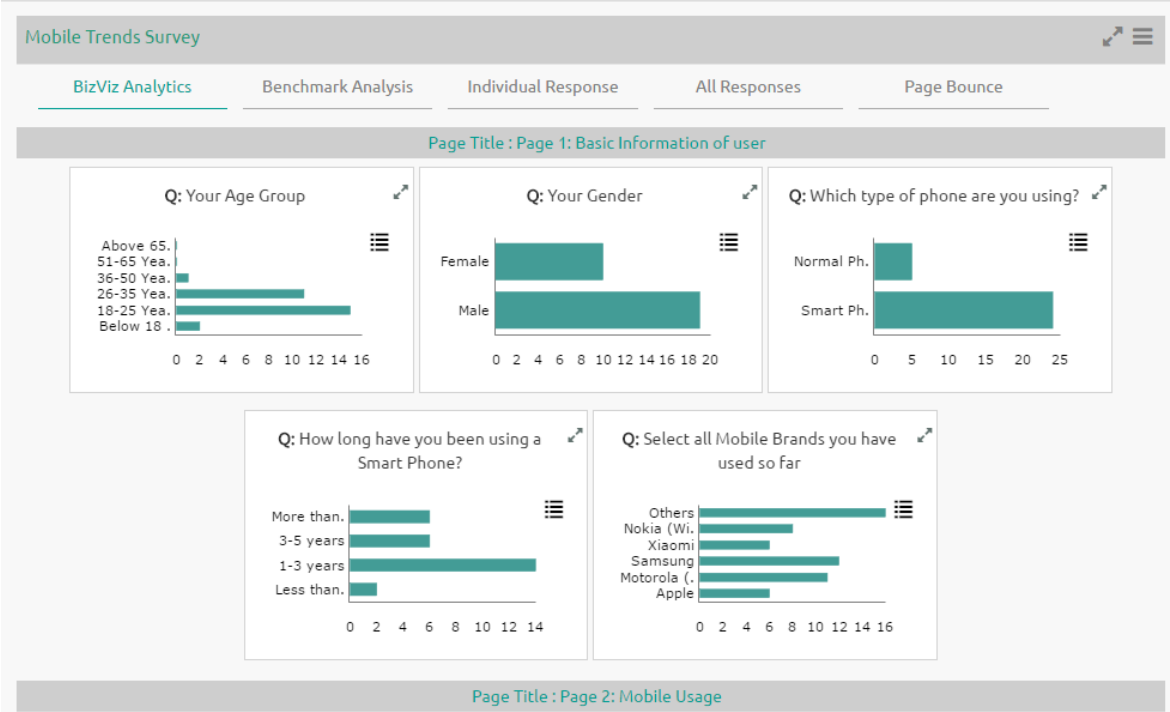
7. Analyzing Result for a Survey

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

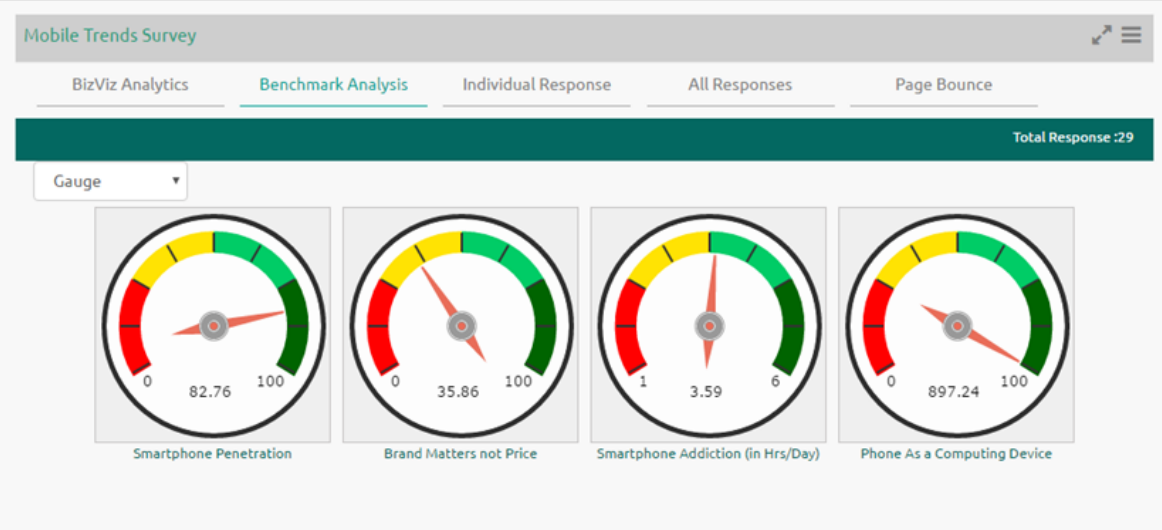
This section displays question specific analysis of the survey responses through graphical charts.



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

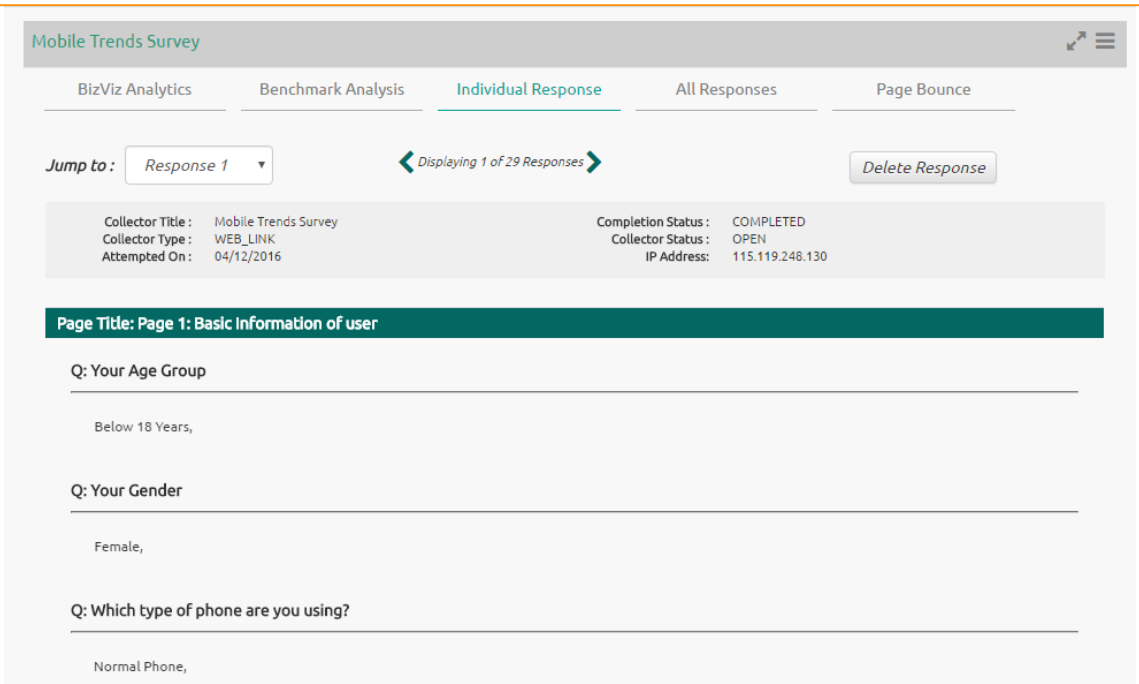
7.2. Benchmark Analysis

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.



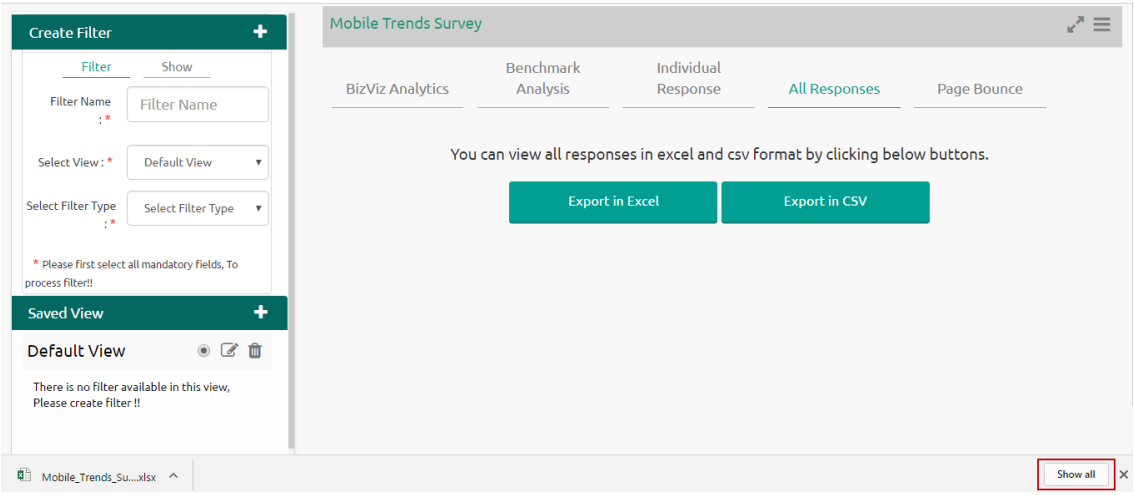
7.4. All Responses

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

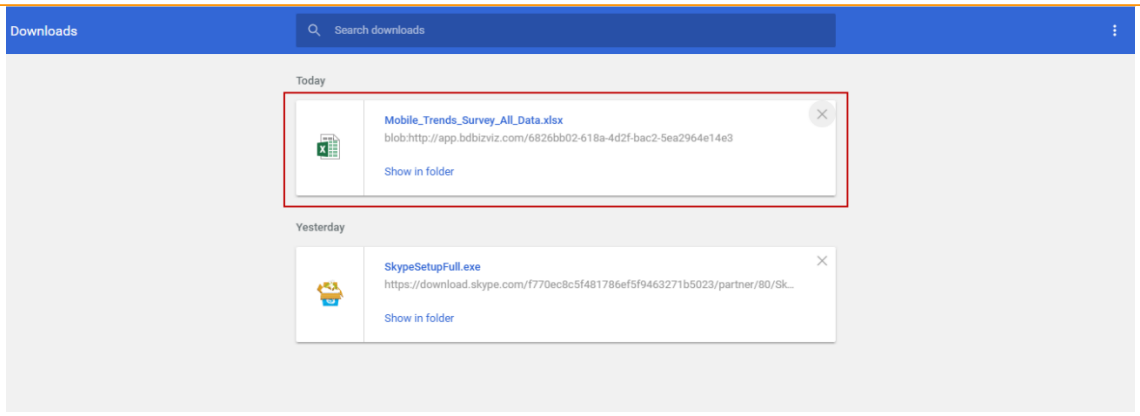
i) Click '**All Responses**'

ii) The following options will be provided to view the responses:

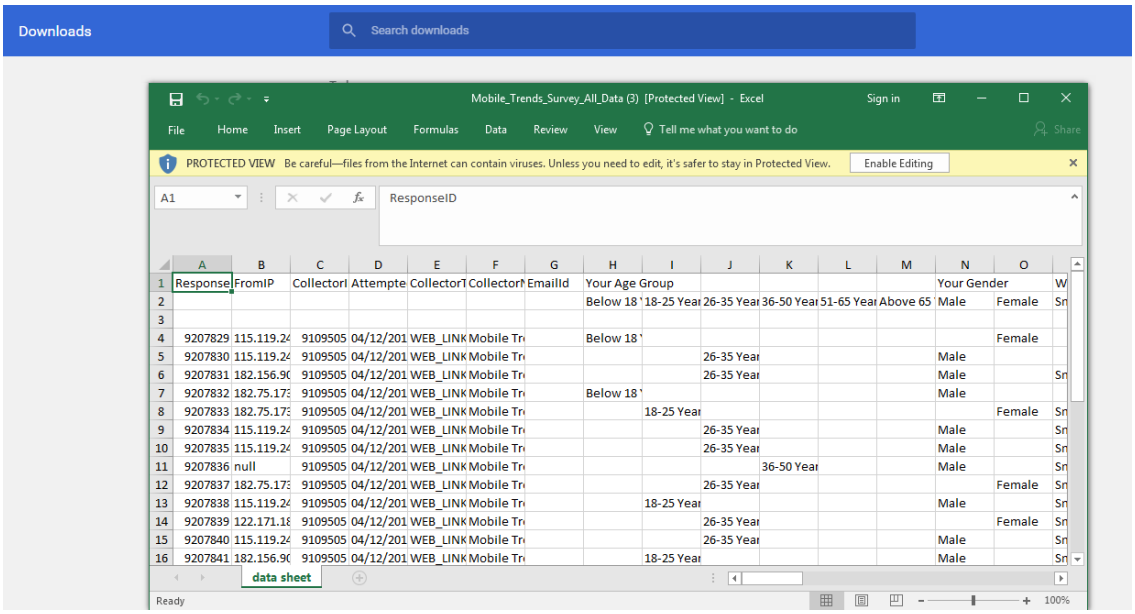
1. **Export in Excel:**
   a. Click '**Export in Excel**.'
   b. All the responses will be exported in an Excel file.
   c. Click '**Show all.'**



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



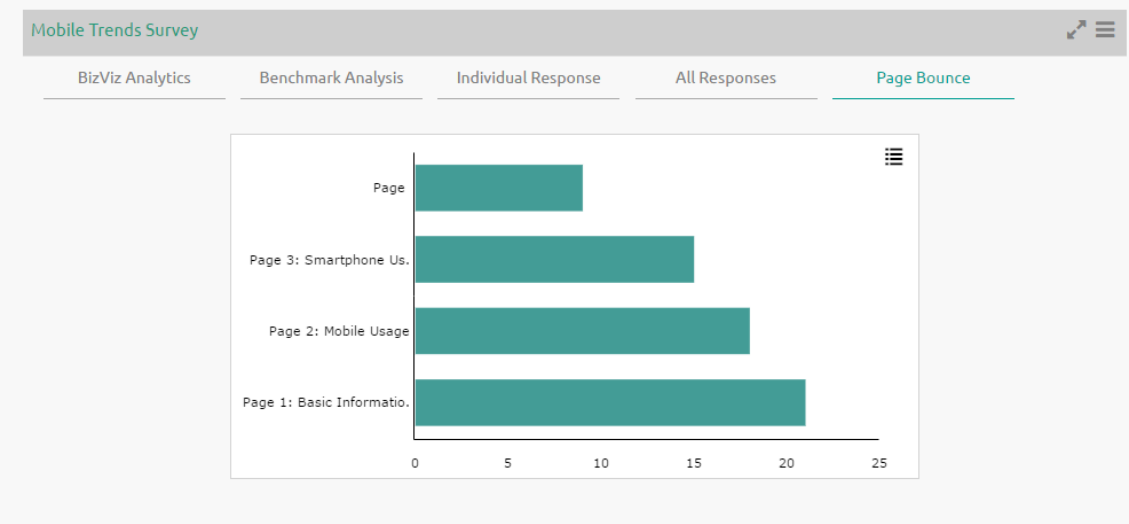
e. Click on the file to open it.



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

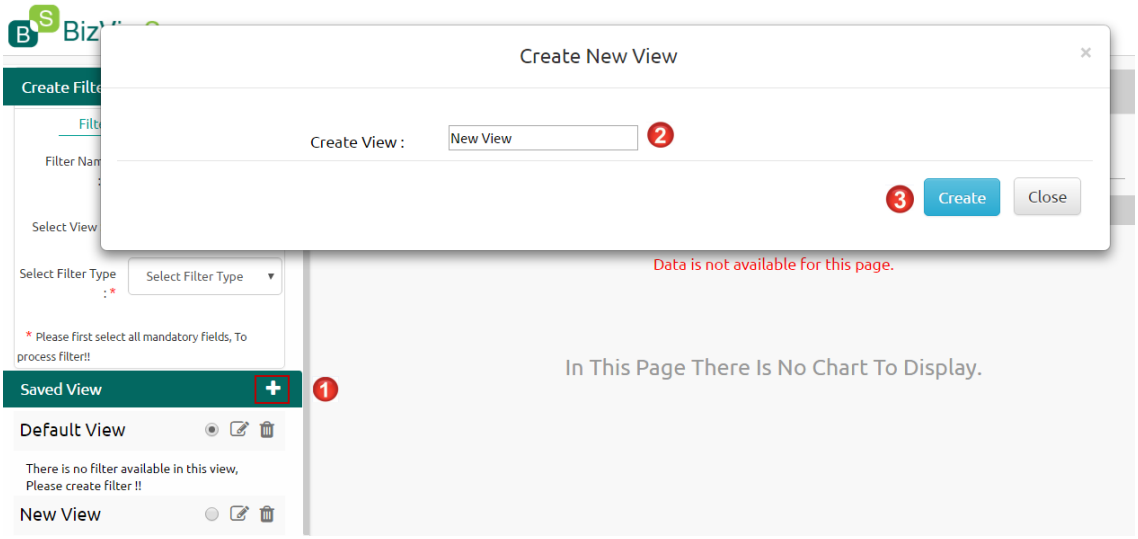
It points out when the recipients ended precisely a survey. The Page Bounce tab displays page-wise proportions of responses presented through an advanced analytical chart.



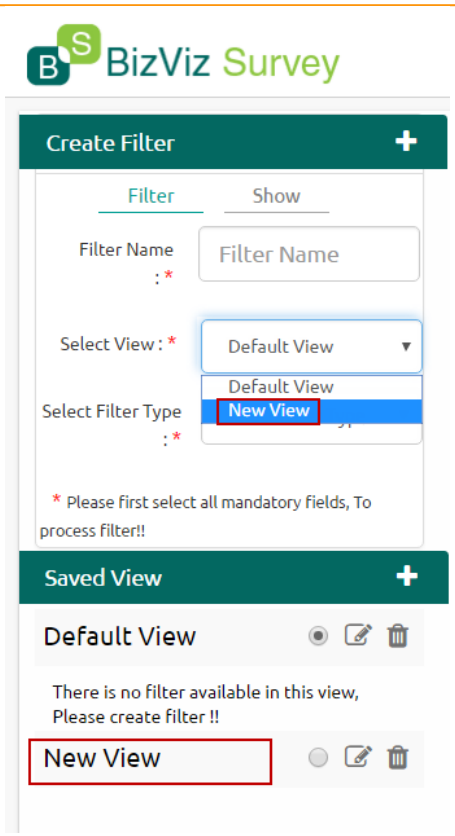
7.6. Creating a New View in the Analyze Result

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.



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.



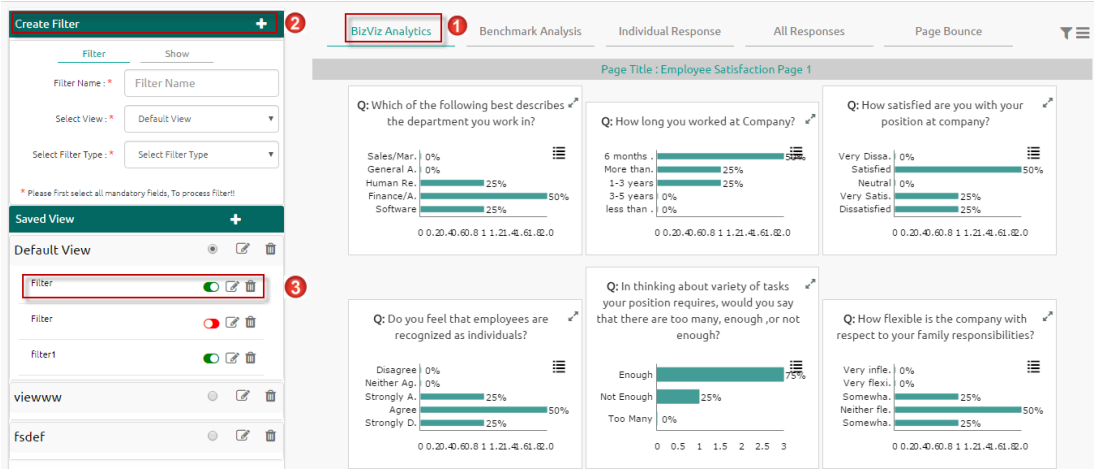
Note: Users can create a list of filters using each created view.

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
	Edit	To modify or change the filter name, filter view, and filter types choices
	Delete	To remove the selected filter

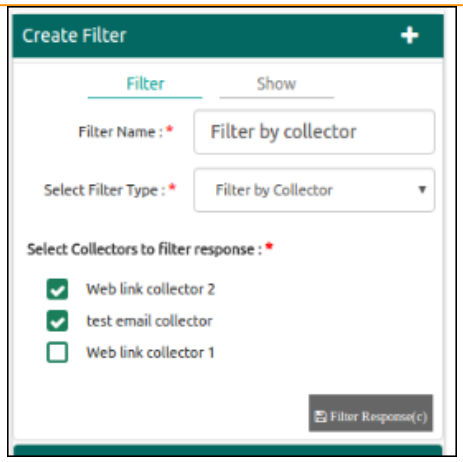
7.7.3. Filter Logic

- 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:

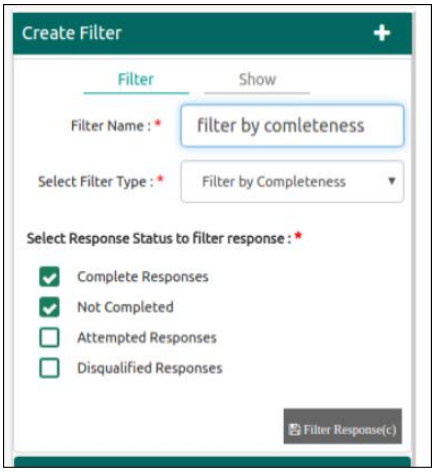
- Users can check the response of a specific collector by applying this filter
- Multiple collector filters can be selected at a time



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

2. Filter by Completeness

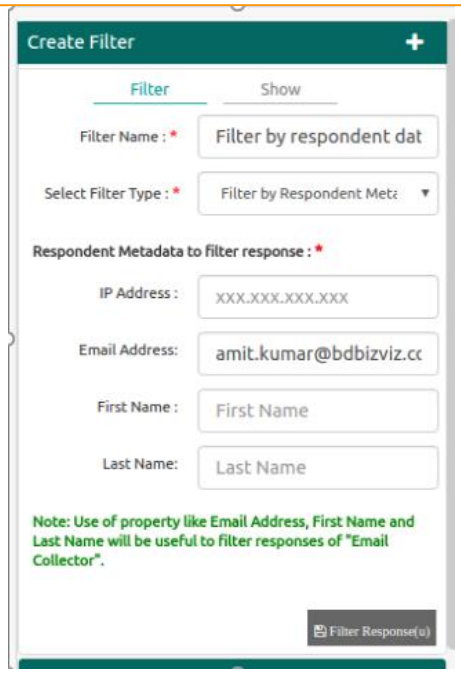
- It filters responses by their status
- The responses can be divided into four sections, based on their status:
  - Completed Responses
  - Not Completed
  - Attempted Responses
  - Disqualified Responses



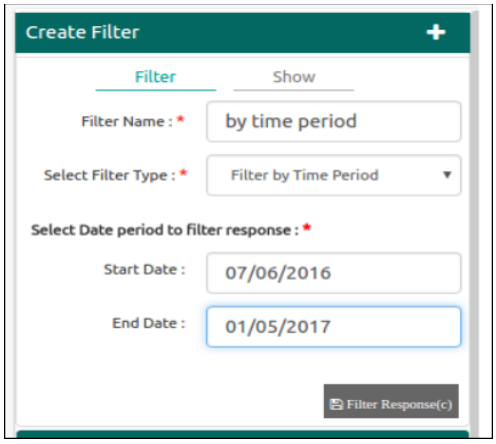
Note: By default, '**Completed**' and '**Disqualified**' responses are displayed.

3. Filter by Respondent Metadata

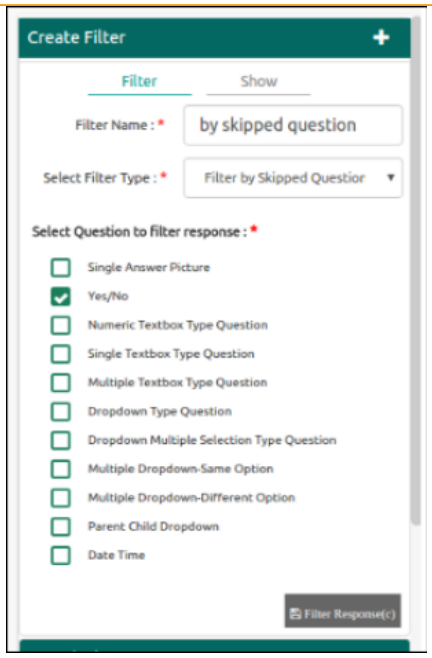
- The collected responses can be filtered based on the respondents' metadata.
- Currently, four types of metadata details are included:
  - IP Address
  - Email Address
  - First Name
  - Last Name
- The collected responses can be filtered based on anyone metadata criteria.



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

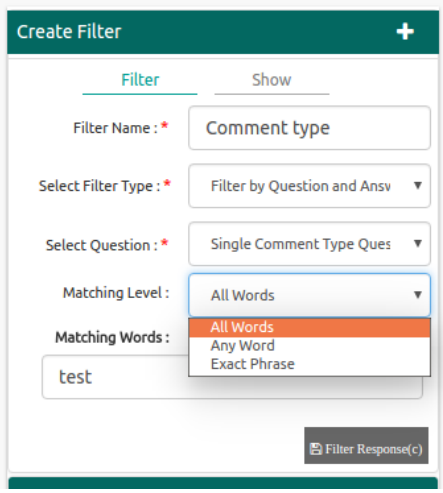


5. **Filter by Skipped Questions**
   - This option can be used to view all the questions where the respondent has not attempted an answer.
   - The survey administrator can select a question as the filter to collect responses.

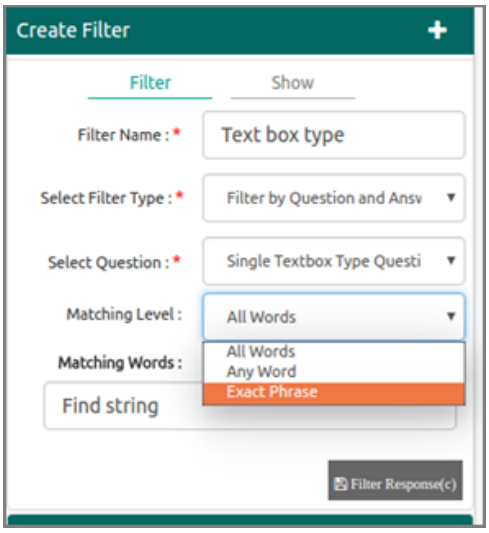


6. **Filter by Question and Answer**
   - This filter option is based on the various question types provided for Survey.
   - This option contains mainly 2 question types:
     - Closed-ended Questions: Questions with defined answer choices (E.g., Multiple Choice, Matrix, Drop-down).
     - Open-ended 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

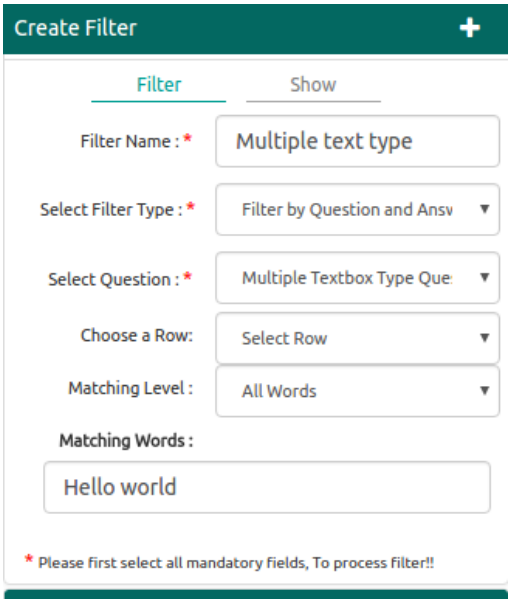


2. **Textbox:**
   a. Responses can be filtered by matching the entered text from Users' comment for this question type.
   b. This question type is mainly used for small comments.
   c. Admin can filter some selected text from users' comment as a response on any chosen level.
   d. Levels on which the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

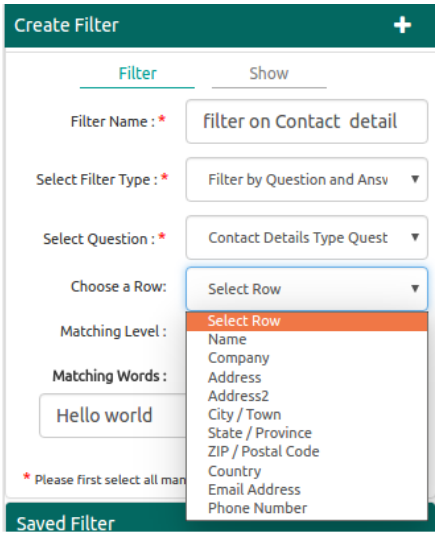


3. **Multiple Textbox:**
   a. Responses can be filtered by matching the entered text from Users' comment for this question type.
   b. This question type is same as Textbox, but users can choose multiple answer choices that will be determined through the row.
   c. Admin can filter some selected text 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

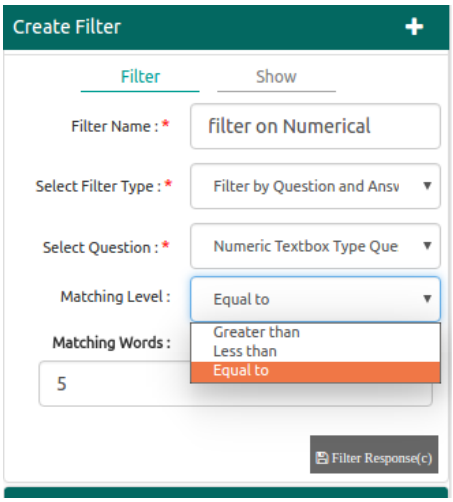
ii. Any Word
iii. Exact Phrase



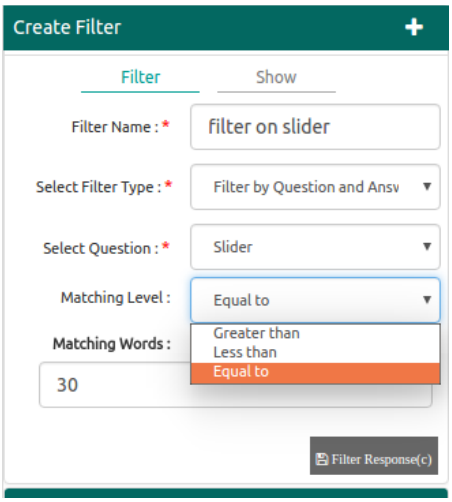
4. **Contact Details:**
   a. Responses can be filtered by matching the entered text from Users' response to this question type.
   b. It is the same as Textbox, but the rows will be provided with the fixed description in this type of question.
   c. Admin can filter some selected text from users' comment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



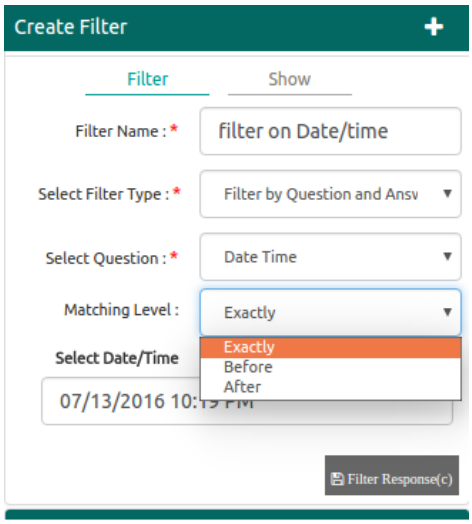
5. **Numerical Textbox:**
   a. Responses can be filtered by matching the entered number from Users' response.
   b. Responses can be filtered by a given number in the filter with all responses of this question.
   c. Constraints on which this filter will be applied are:
      i. Greater than
      ii.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



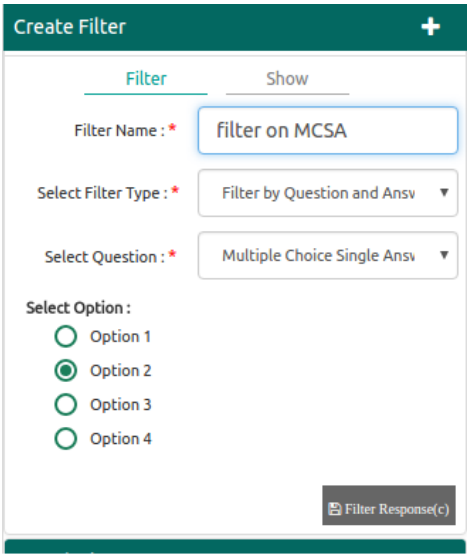
6. **Slider:**
   a. Responses can be filtered by matching the entered number from Users' response.
   b. This question type is same as Numerical type, but users can have the option to select a value in each range only.
   c. Responses can be filtered by a given number in the filter with all responses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



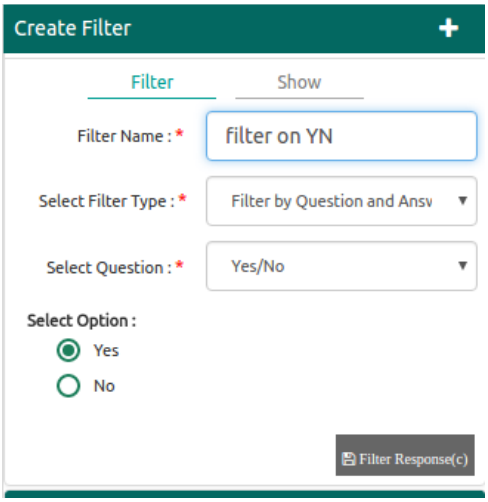
7. **Date and Time:**
    a. Responses can be filtered by matching the entered date from Users' response.
    b. This question type is same as Numerical type, but users can have the option to select a value in each range only.
    c. Responses can be filtered by a given date with constraints of matching 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.



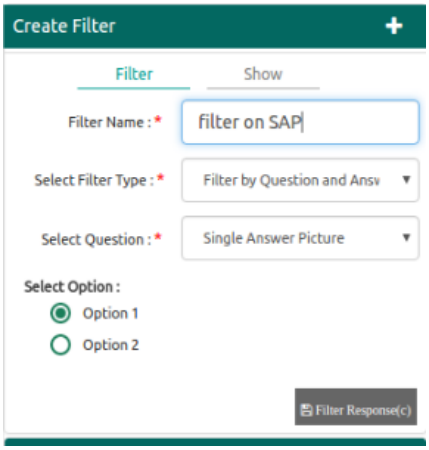
8. **Multiple Choice Single Answer:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select only one option to filter the responses. The selected option will be reflected in all the tabs on the right panel.



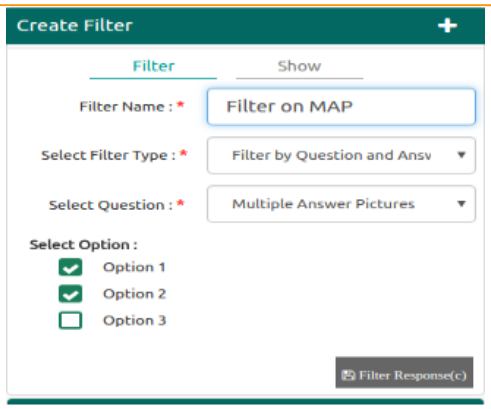
9. **Yes/No:**
    a. Responses can be filtered by matching the selected option.
    E.g., select either '**Yes**' or '**No**' option from Users' response.
    b. Users can select only one option to filter the responses. The selected option will be reflected in all the tabs on the right panel.



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.

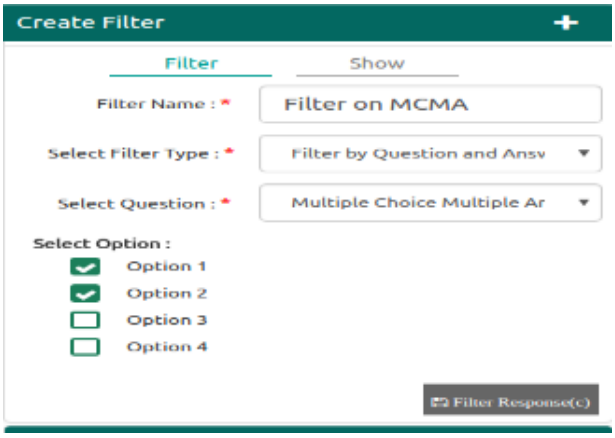


11. **Multiple Answer Picture:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select multiple options to filter the responses. Apply 'OR' logic on the selected options.

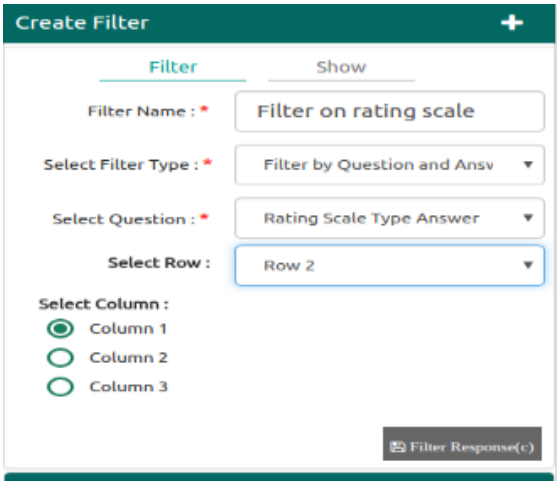


12. **Net Promoter Score:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select multiple options to filter the responses. Apply 'OR' logic on the selected options.

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.

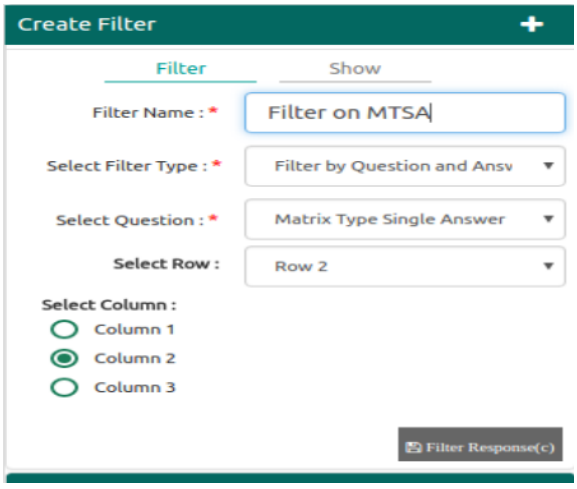


14. **Rating Scale:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select any a row value from the drop-down menu.
    c. Select a column or multiple columns using the radio box.

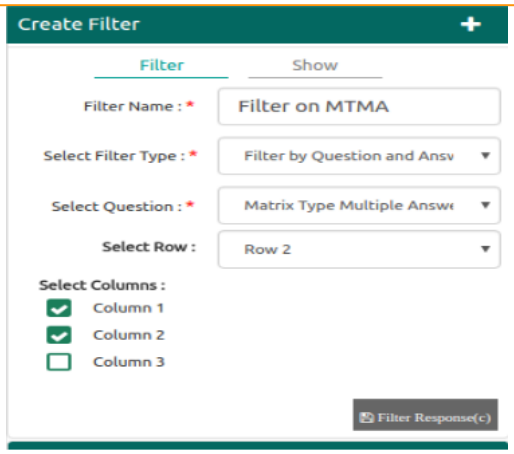


    d. Based on the above selection response gets filtered.

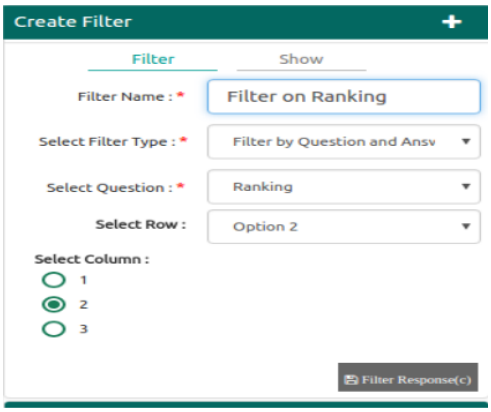
15. **Matrix Single Answer Per Row:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select any one-row value from the drop-down menu and any one-column from the radio box. Based on this selection response will be filtered.
    c. Each selection is mandatory.



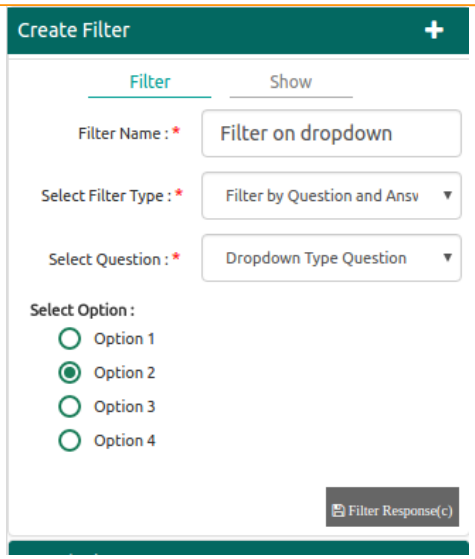
16. **Matrix Multiple Answer Per Row:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select a row value from the drop-down menu and a column from the checkbox. Based on this selection response will be filtered.
    c. Each selection is mandatory.



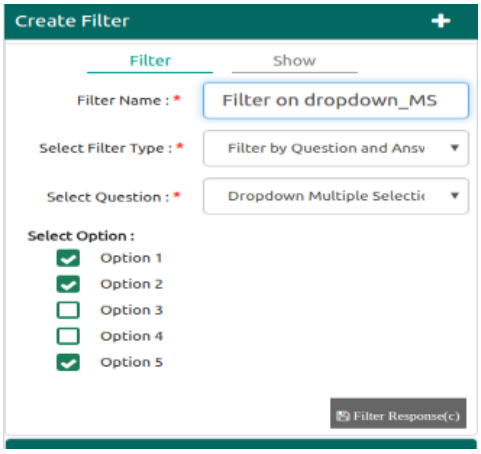
17. **Ranking:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select any one-row value from the drop-down menu and any one column from the radio box as rank. Based on this selection response will be filtered.
    c. Each selection is mandatory.



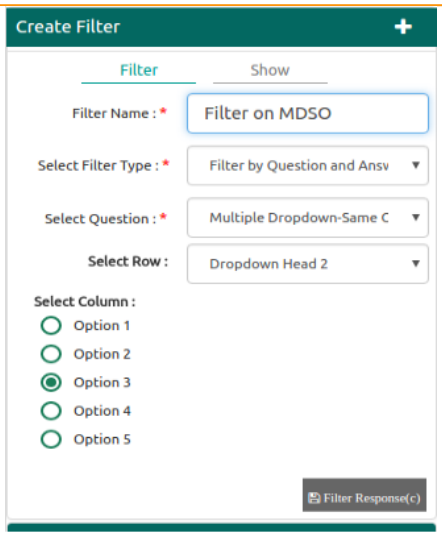
18. **Dropdown:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select only one option to filter the responses. The chosen option will be reflected on all the tabs on the right panel.



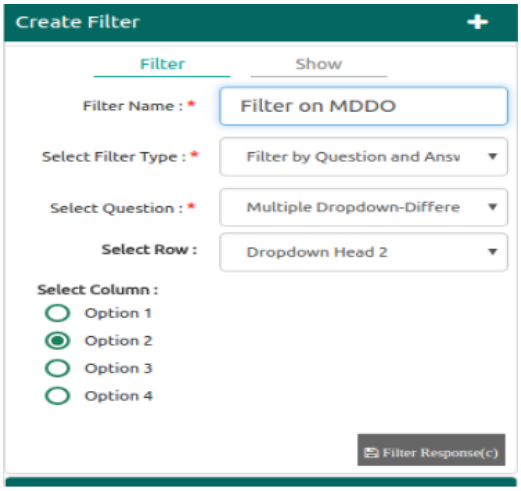
19. **Dropdown Multiple Selection:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select multiple options to filter the responses. Apply 'OR' logic on the selected options. The selected options will be reflected on all the tabs on the right panel.



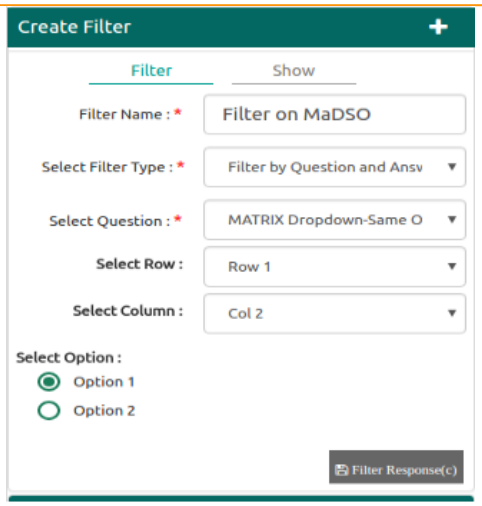
20. **Multiple Dropdown Same Option:**
    a. Responses can be filtered by matching the selected option from the Users' response.
    b. Users can select any one-row value from the drop-down (i.e. 'drop-down head') and any one column from the radio box to filter responses. Based on this selection response will be filtered.
    c. Each selection is mandatory.



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.



22. **Matrix of Dropdown Same Option:**
    a. Responses can be filtered by matching the selected options from Users' response.
    b. Users can select any one-row value, one column value from the drop-down menu and any one option from the radio box. Based on this selection response will be filtered.
    c. Each selection is mandatory.

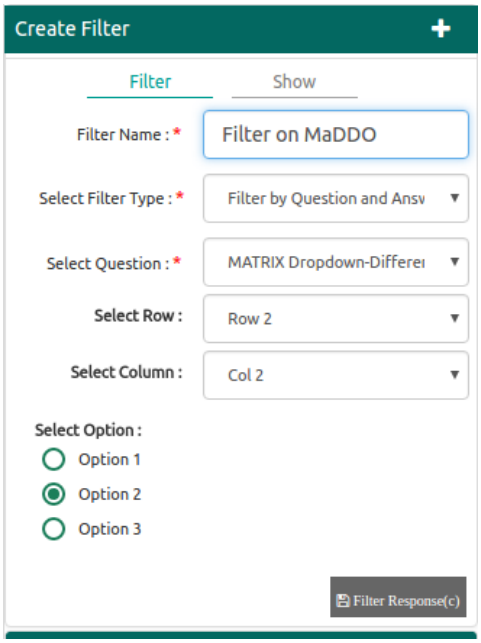


23. Matrix of Dropdown Different Option:

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

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

c. Each selection is mandatory.

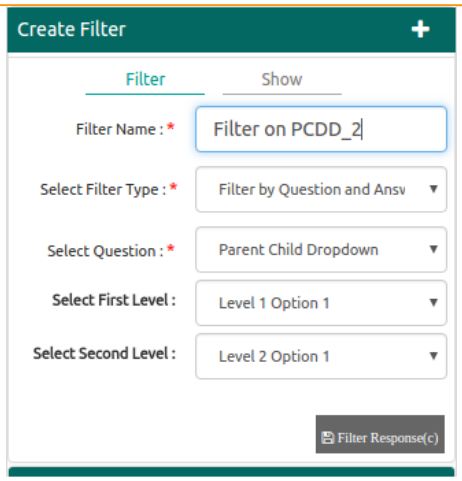


24. Parent-Child Drop-down for Level 2:

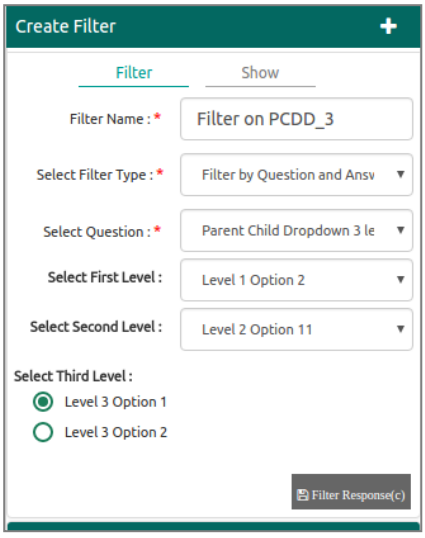
a. Responses can be filtered by matching the selected options from Users' response.

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.



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.

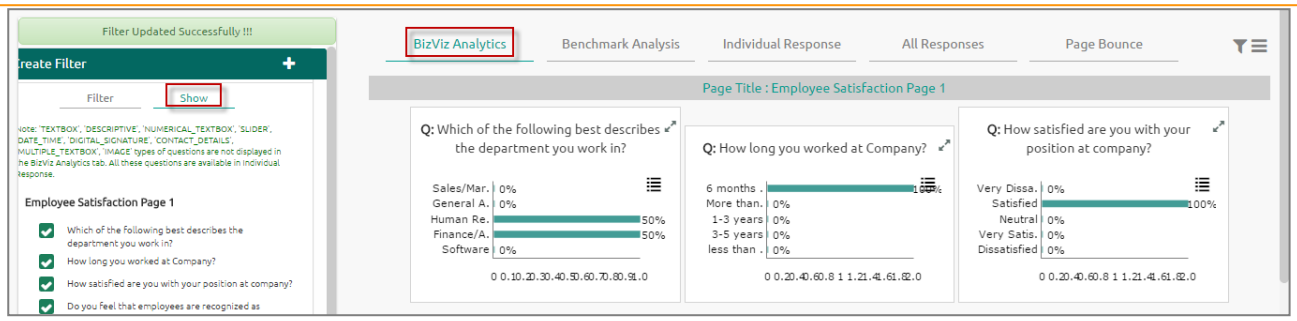


Note: Some Question types are not added in this filter type such as Signature, File Upload, Image, Descriptive.

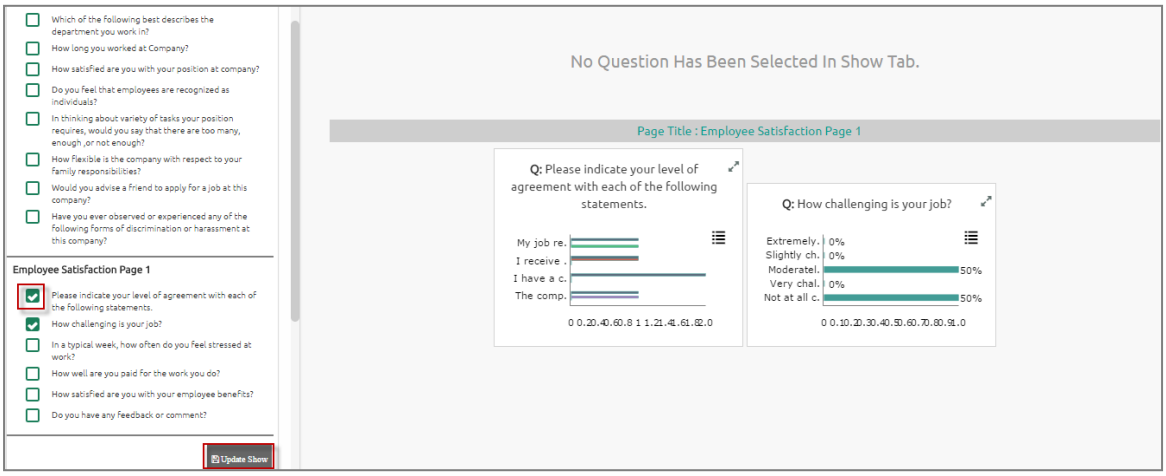
7.8. Show/Hide Rules for Page/Questions

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

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



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



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

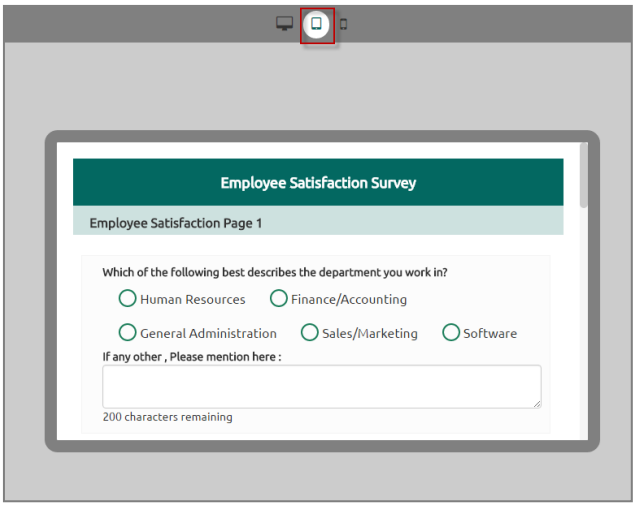
8. More Options

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.

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.



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

Note: By default, the Desktop preview will open.

8.2. Benchmark

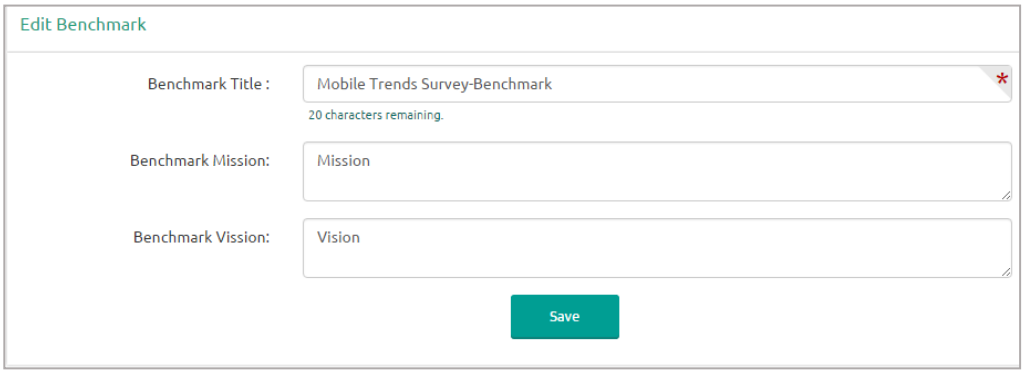
Benchmark is a standard or point of reference for evaluating performance or level of quality. It is pre-requisite to set goals, before using Benchmark as logic or point of reference to derive at the desired comparison.

8.2.1. Editing a Benchmark

i) Navigate to the Survey home page.
ii) Select a survey from the list.
iii) Click '**Settings**' ⚙ provided next to a survey name.
iv) A context menu will open.
v) Select '**Benchmark**' from the menu list.
vi) Users will be redirected to the '**Edit Benchmark**' page.
vii) A new Benchmark will be created and entitled as '**Survey Title-Benchmark**.'
E.g., Mobile Trend Survey will have a benchmark entitled '**Mobile Trend Survey-Benchmark**' by default.
viii) Users can edit the below mentioned fields (if desired). Such as:

- Benchmark Title
- Benchmark Mission
- Benchmark Vision

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



8.2.2. Adding Goal to a Benchmark

i) Navigate to the benchmark page.

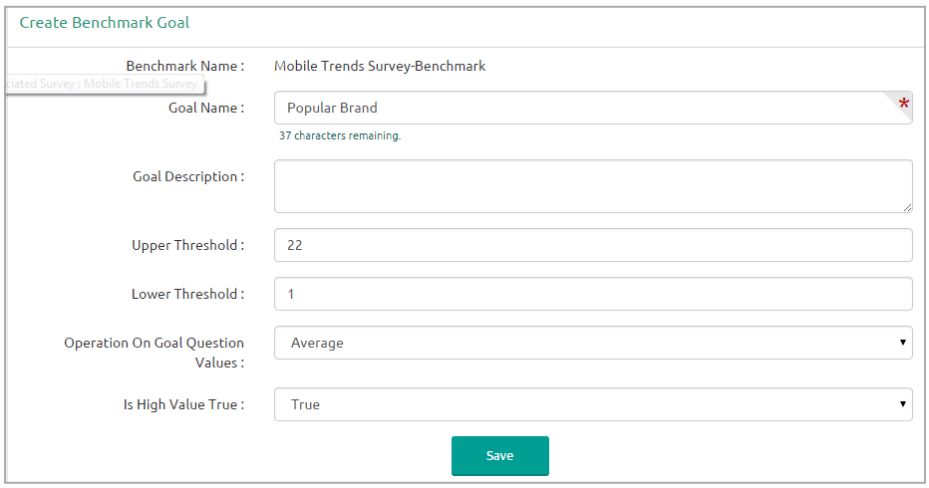
ii) Click '**Add New Goal**' on the left pane of the page.

iii) Users will be redirected to the '**Create Benchmark Goal**' page.

iv) Fill in the following information:

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

v) Click the '**Save**' option.



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

Note:

a. Benchmark name will be displayed by default.

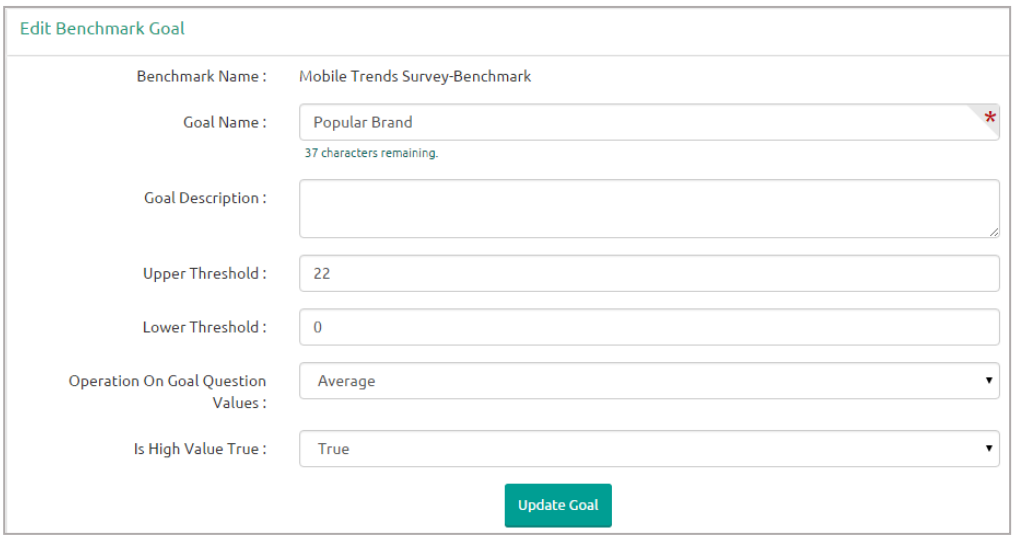
b. Fields with validation symbol * are mandatory.

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

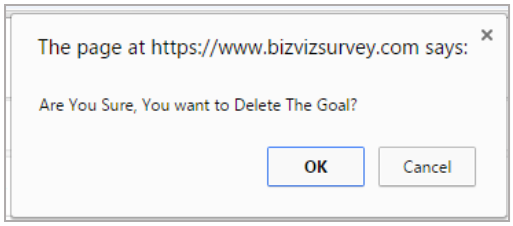
iv) Click the '**Update Goal**' option.



v) The edited goal information will be saved.

8.3.1. Deleting a Benchmark Goal

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

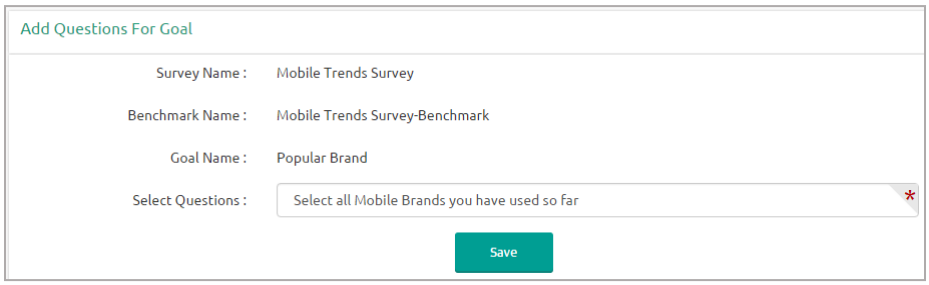


iv) The selected benchmark goal will be deleted.

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.



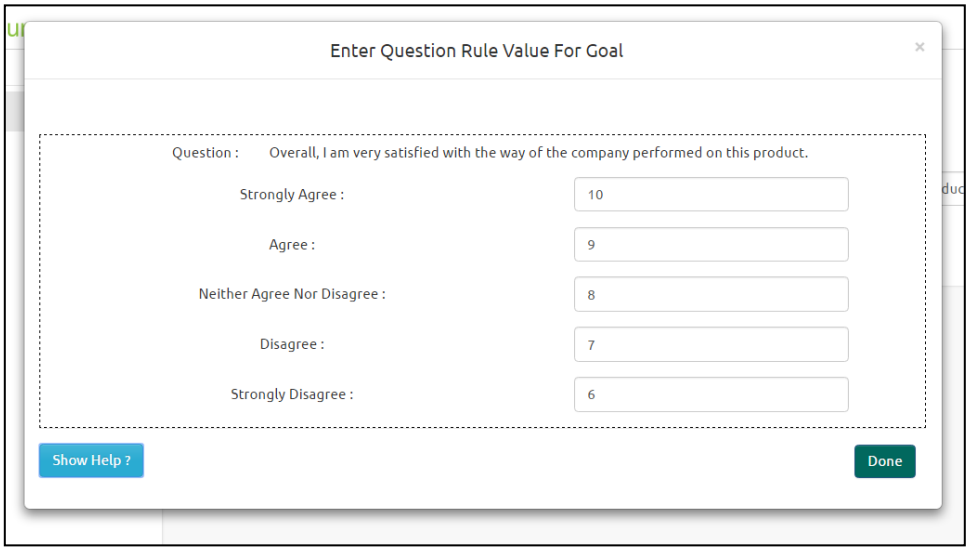
iii) Users get redirected to '**Enter Question Rule Value for Goal**' screen.

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.



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.

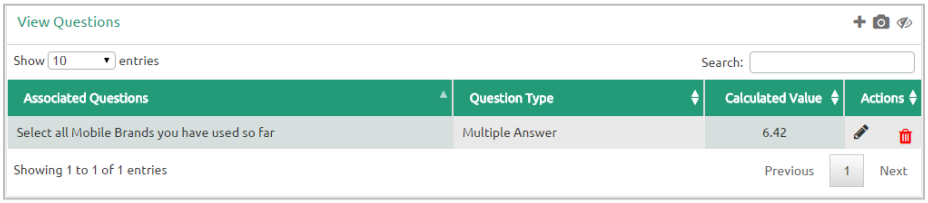
8.3.3. Viewing a Goal Question

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



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

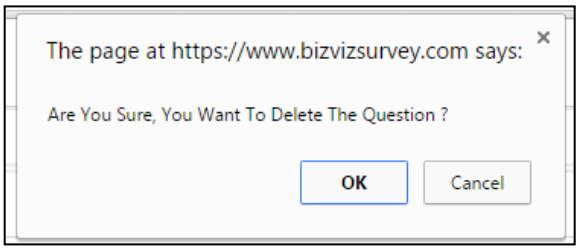
8.3.4. Deleting a Benchmark Goal Question

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

ii) Click '**Delete**' 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:

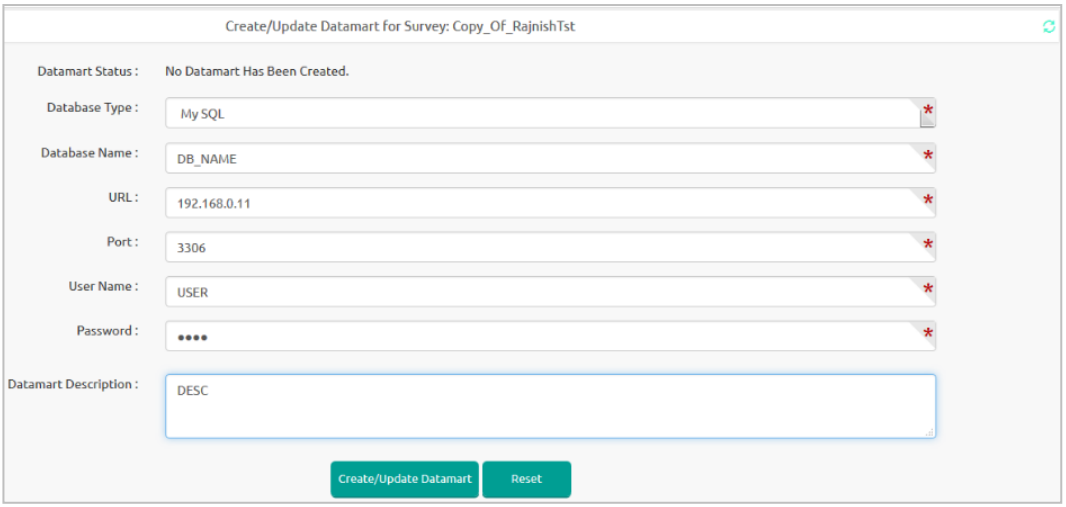
a. **Datamart Status**: It will show that no Datamart has been created.

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)

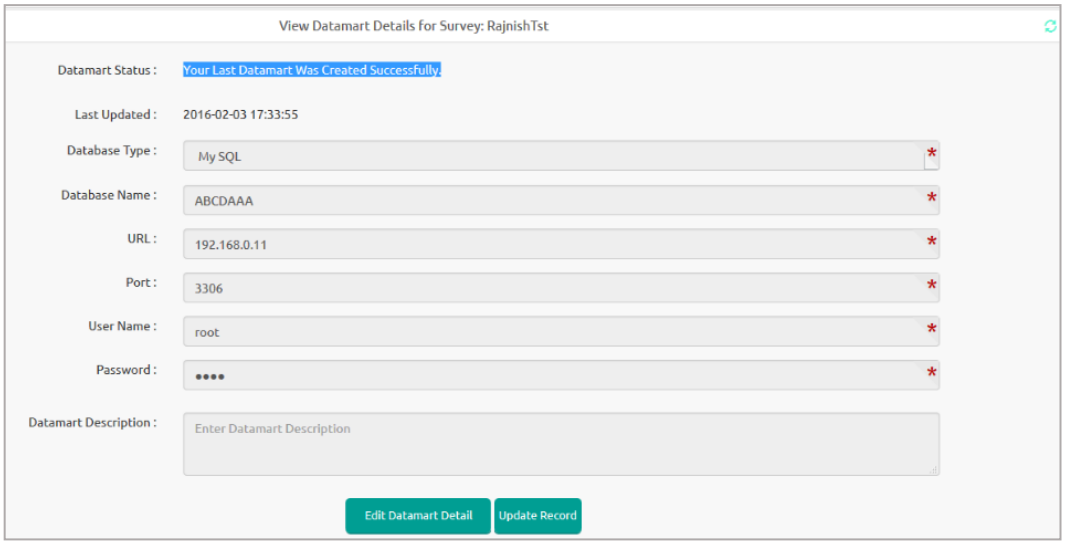
vii) Click **'Create/ Update Datamart**' to create a Datamart

OR

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



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.

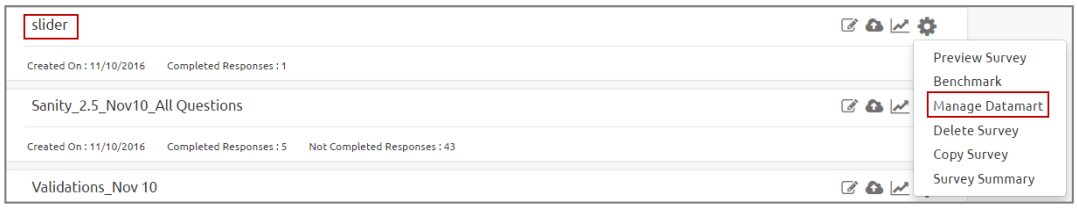


8.4.2. Implementing Scheduler in the DataMart Section

i) Select a Survey from the Survey list.

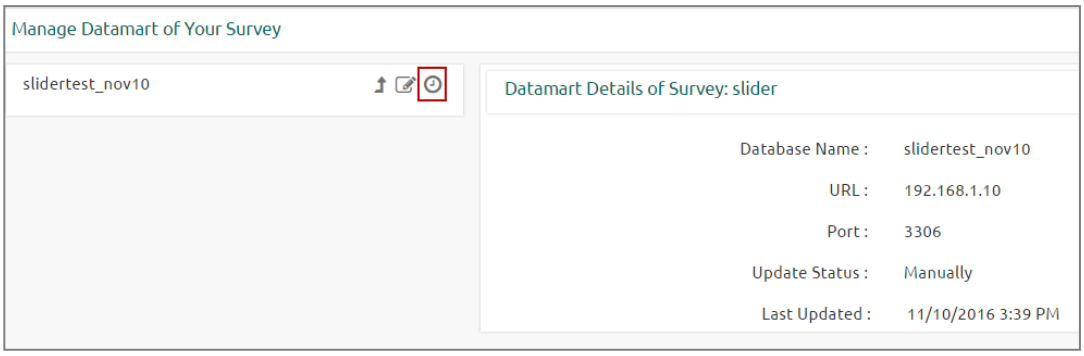
ii) Click '**More Options**'

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



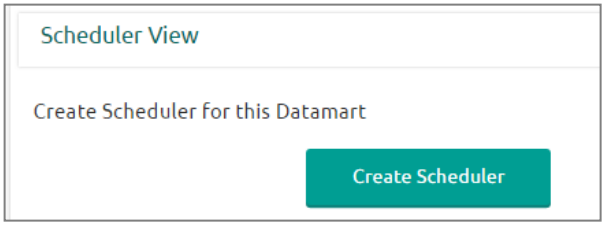
iv) DataMart details will be displayed.

v) Click '**Update Settings**'



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

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

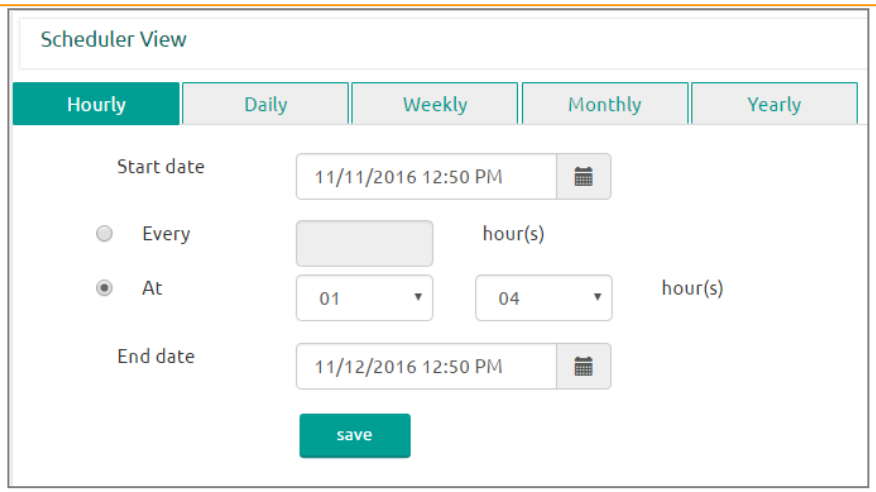


viii) Users will be directed to a new screen.

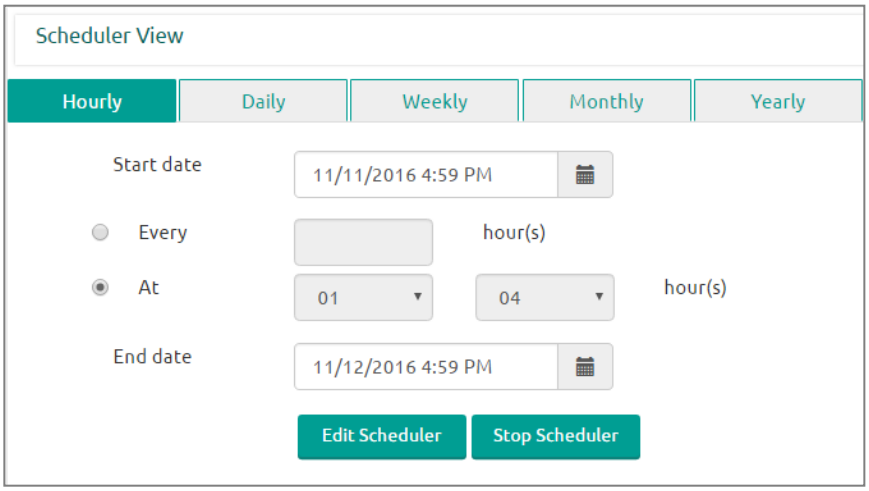
ix) Complete the following configurations:

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

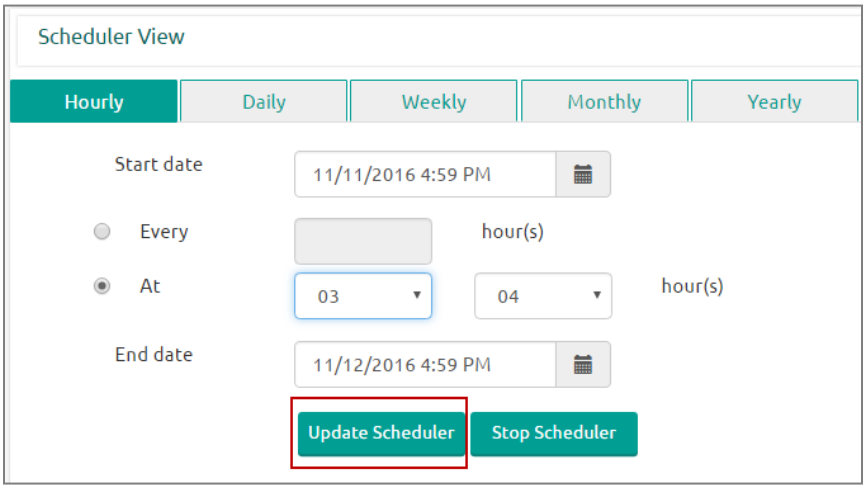
x) Click the '**Save**' option.



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

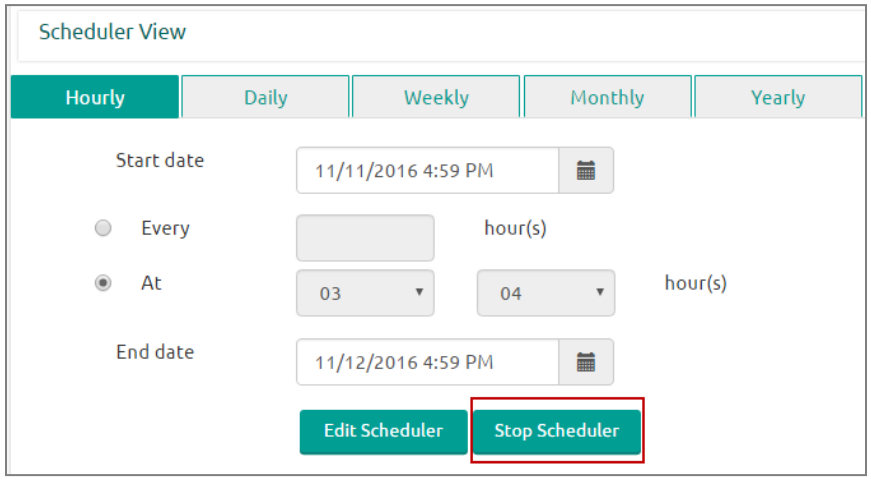


- **Editing the Scheduler:**
  - Click '**Edit Scheduler**' on the '**Create Scheduler'** screen.
  - Edit information as needed.
  - Click '**Update Scheduler**'.

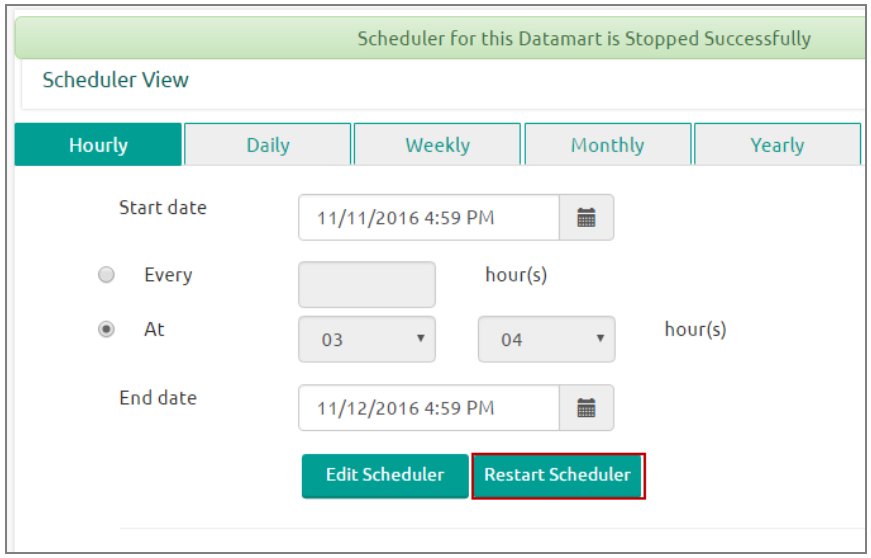


- The scheduler information will be updated successfully.

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



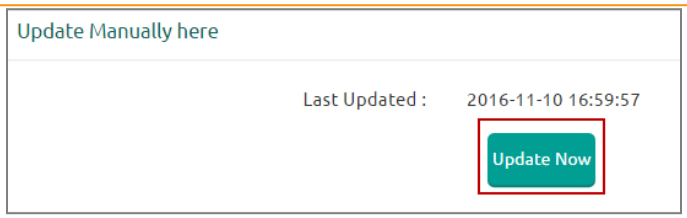
  - Click 'Restart Scheduler' to resume the scheduler



8.4.3. Other Options

i. Update Now:

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

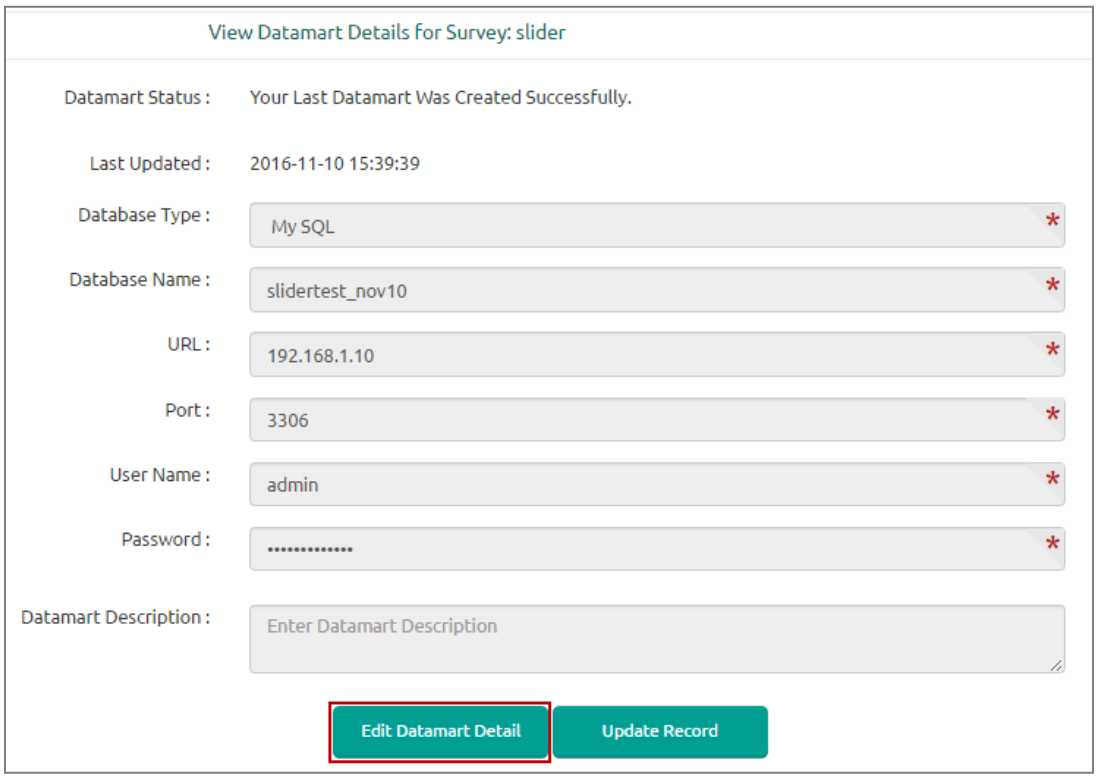


4. The scheduler will be updated

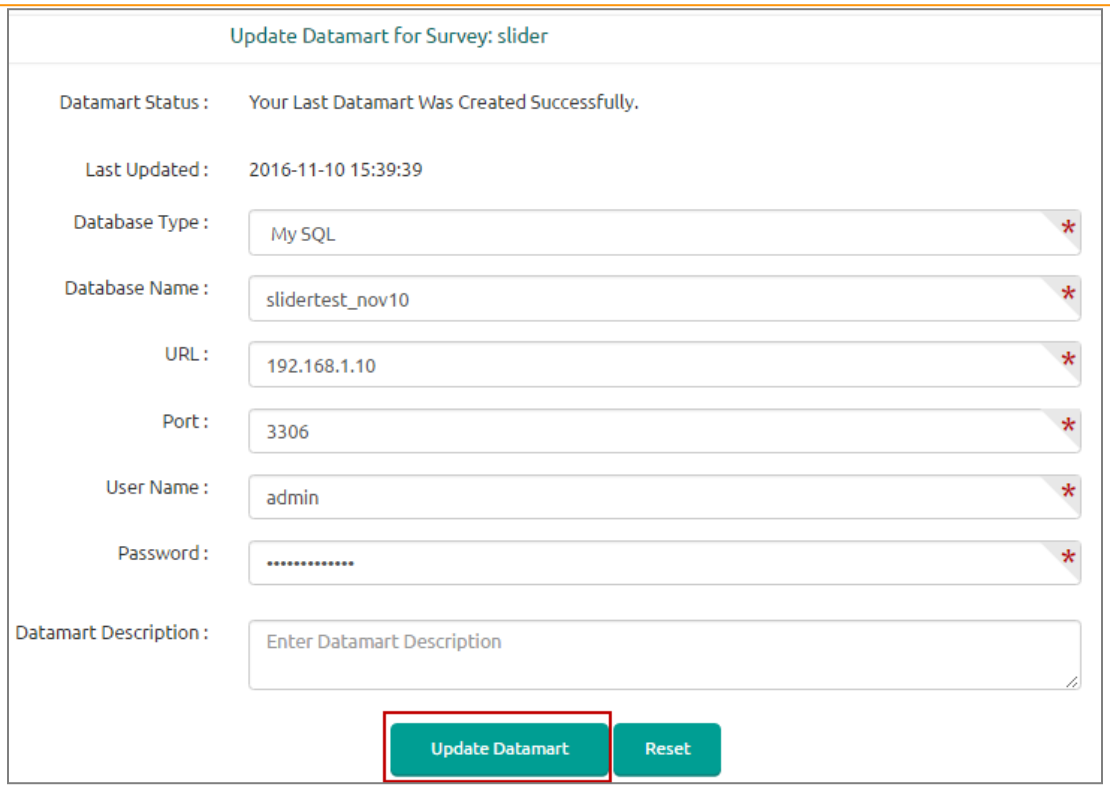
ii. Edit DataMart:

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

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



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



6. DataMart details will be updated successfully

Notes:

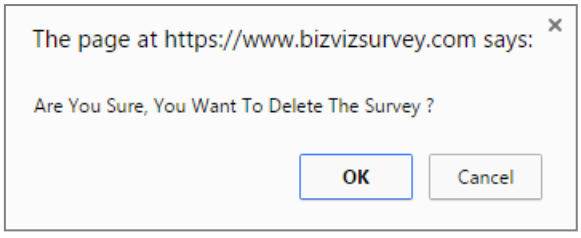
a. Changes to DataMart details may require the DataMart to be recreated at the given IP address.
b. To update a record in DataMart, use '**Update Record**' button.

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

8.5. Deleting a Survey

i) Navigate to the survey home page.

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



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**'.

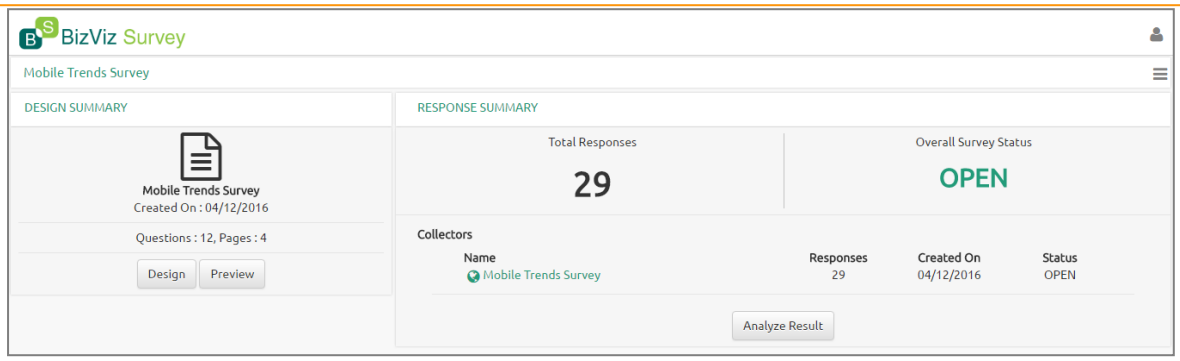
Note:

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.



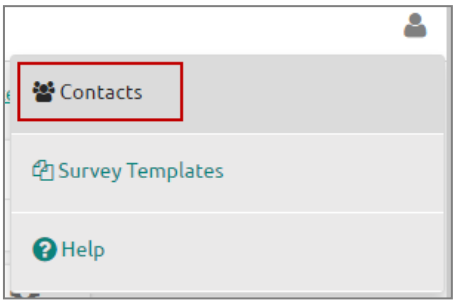
Note: Users are provided with options to design, preview, and analyze a survey on the '**Survey Summary**' page.

9. Contacts

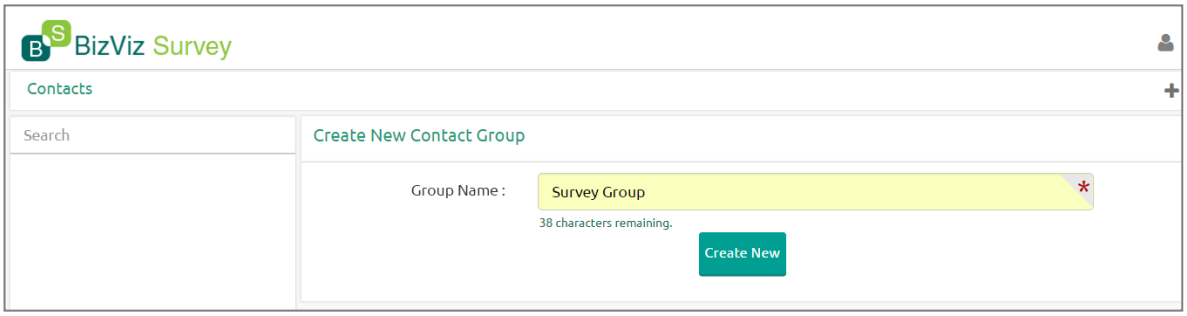
Contacts and contact groups are created to maintain an address book for sharing a survey.

9.1. Creating a Contact Group

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



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



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

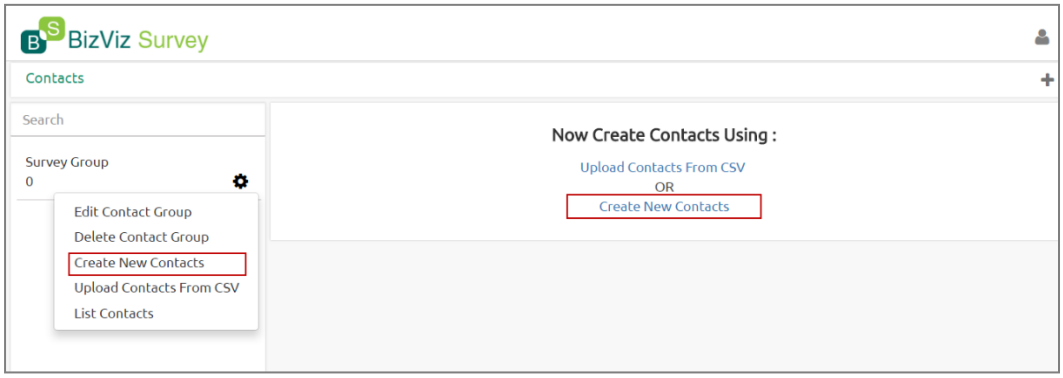
Users can add new contacts into a contact group via the following ways:

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 ⚙ context menu provided next to the Contact Name.



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

iii) Enter the following information manually:

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

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

v) Click '**Create**'.

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

9.2.2. Uploading Contacts from CSV File

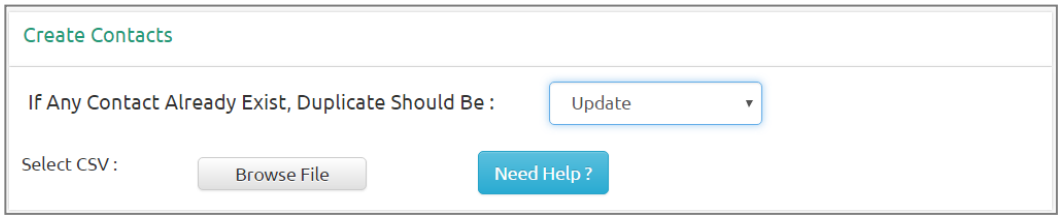
i) Select '**Upload Contacts from CSV**' option that has been displayed by default after creating a contact group.

OR

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

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

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

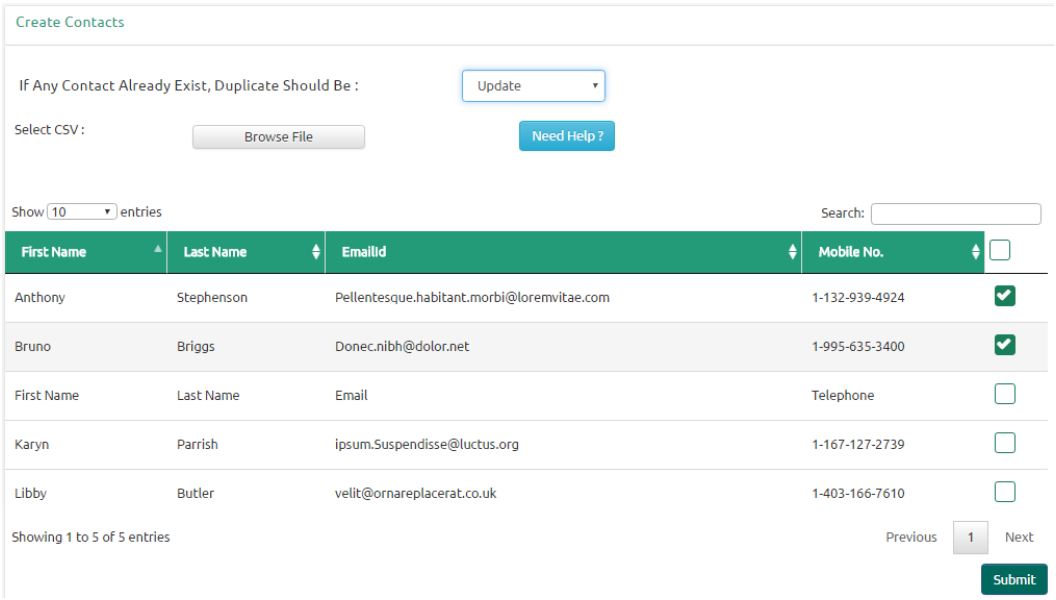


iv) Contacts details will be displayed on the screen from the CSV file.

v) Select the '**Update**' option.

vi) Select contact details by tick marking the boxes.

vii) Click '**Submit**'.



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

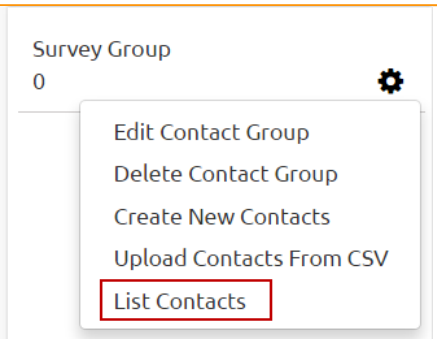
Note: Users can select all the contacts from the list by tick marking the box provided next to the heading Mobile No.

9.3. Listing a Contact

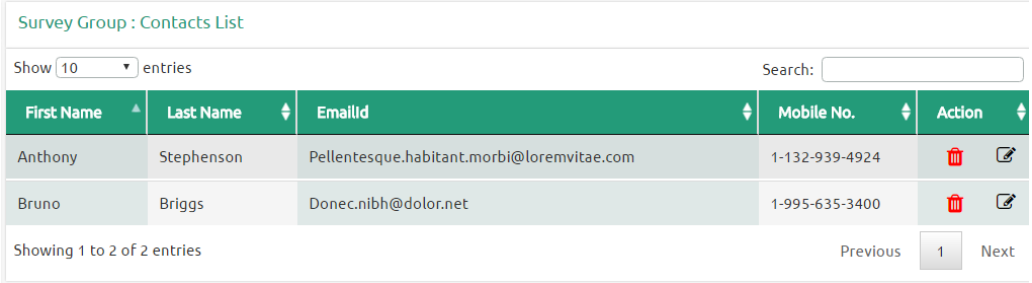
i) Click the '**Settings**' icon on the contacts page.

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.



Note:

a. Click '**Delete**' icon to remove a contact from the contact list.

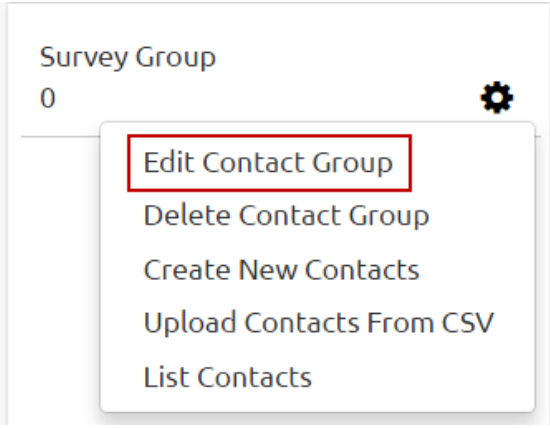
b. Click '**Edit**' icon to edit contact details for the selected contact.

9.4. Editing a Contact Group

i) Click '**Settings**' on the contacts page.

ii) A context menu will open.

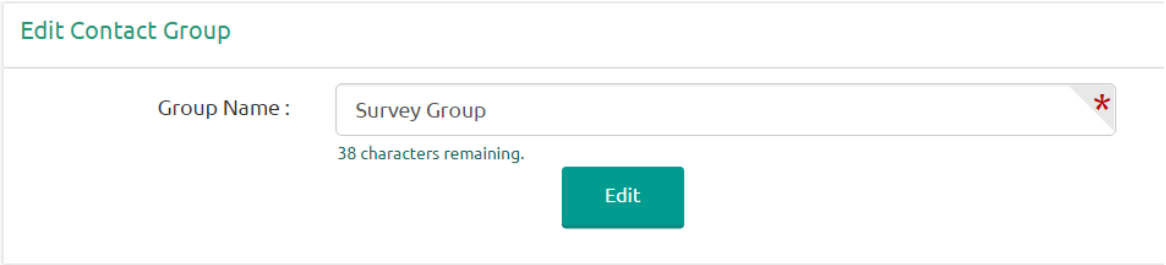
iii) Select the '**Edit Contact Group**' option.



iv) Users will be redirected to edit the contact group details.

v) Edit the '**Group Name**'.

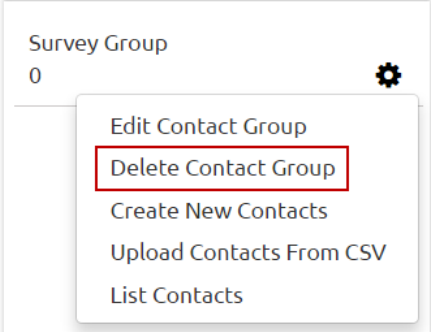
vi) Click the '**Edit**' option.



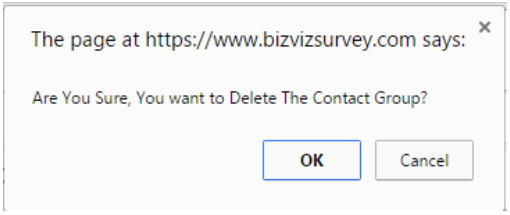
vii) The desired information will be edited.

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.



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

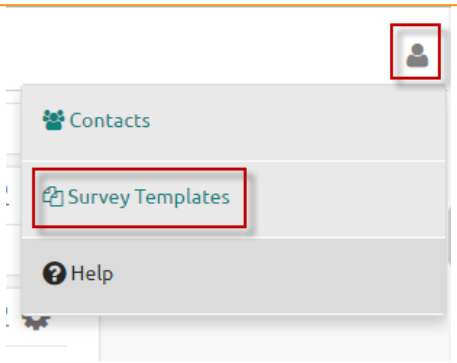


vi) The selected contact group will be deleted.

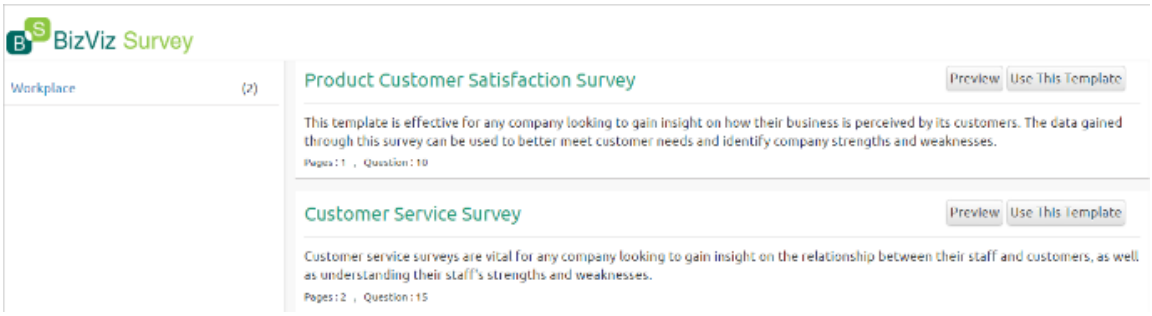
10. Survey Template

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

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



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



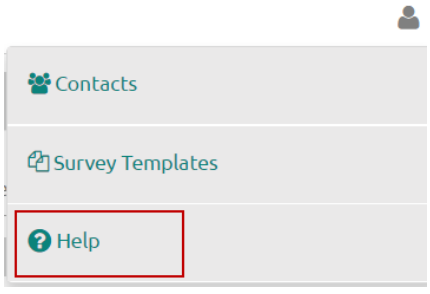
v) Click '**Preview**' to see a preview of the survey template.
vi) Click '**Use This Survey**' to create the selected survey in the current user account.

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

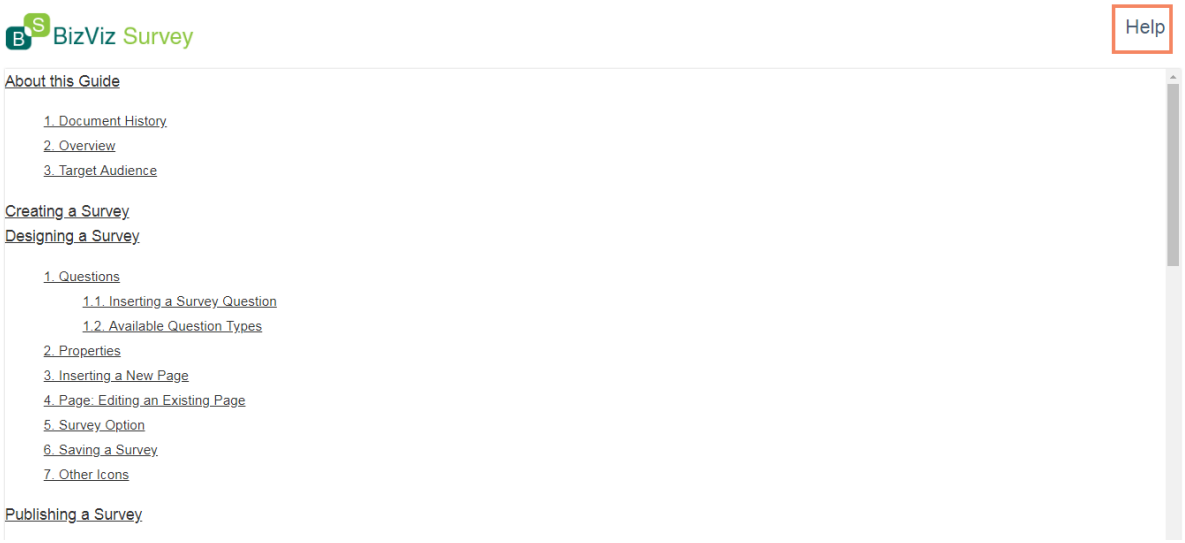
11. Help

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

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



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



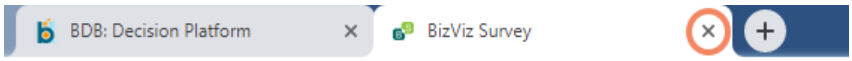
12. Signing Out

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.

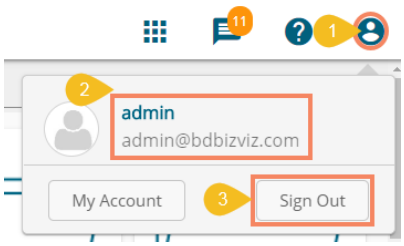


iii) Closing the Survey window will redirect the user back to the **BDB Platform homepage**.

12.2. Signing Out

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

i) Click the '**User**' icon 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.