

# **User Guide**

## Survey R-4.5



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## **1. Introduction**

#### 1.1. Introducing the BDB Survey

The BDB Survey empowers business organizations with the ability to create unique, interactive, and operational surveys to gather valuable information starting from customer feedback extending up to product research. It serves as a useful tool to collect, store, and analyze relevant information regarding any business aspect. The responses collected using a survey get used in preparing various interactive reports and dashboards. Hence, this integration of the BDB Survey with BDB Analytics makes it a robust analytic tool extracting hidden insights out of the collected data.

#### **1.2.** Document History

Product Version	Date (Release Date)	Description
Survey 1.0	June 9 <sup>th</sup> , 2015	First Release of the document
Survey 2.0	February 18 <sup>th</sup> , 2016	Updated document
Survey 2.1	May 11 <sup>th</sup> , 2016	Updated document
Survey 2.5	November 9 <sup>th</sup> , 2016	Updated document
Survey 3.0	August 31 <sup>st</sup> , 2017	Updated document
Survey 3.2	February 2 <sup>nd,</sup> 2018	Updated document
Survey 3.5	April 15 <sup>th</sup> , 2018	Updated document
Survey 3.6	August 20 <sup>th</sup> , 2018	Updated document
Survey 3.7	October 10 <sup>th</sup> , 2018	Updated document
Survey 3.8	December 1 <sup>st</sup> , 2018	Updated document
Survey 4.0	December 31 <sup>st</sup> , 2018	Updated document
Survey 4.2	March 25 <sup>th</sup> , 2019	Updated document
Survey 4.3	April 24 <sup>th</sup> , 2019	Updated document
Survey 4.4	June 7 <sup>th</sup> , 2019	Updated document
Survey 4.5	August 5 <sup>th</sup> , 2019	Updated document

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

#### 1.3. Overview

This guide covers how to:

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

#### 1.4. 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. 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:

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

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

Note: The UI may run successfully in unsupported browsers, it is not actively tested against them.

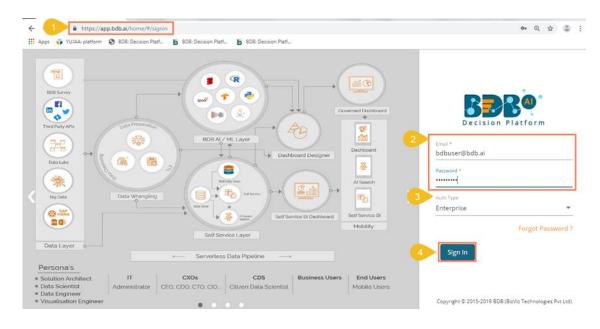
## **3. Getting Started with the BDB Survey**

The survey is a plugin application provided under the BDB Platform. The following section explains the steps to access the survey application using the BDB Platform.

#### 3.1. Accessing the Survey Plugin

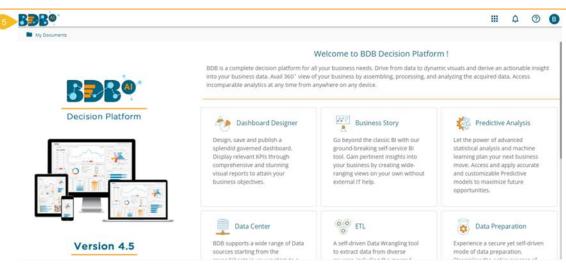
This section explains how to access the BDB Platform and a variety of plugins that it offers:

- i) Open BDB Enterprise Platform Link: https://app.bdb.ai
- ii) Enter your credentials.
- iii) Select an Auth Type from the drop-down menu.
- iv) Click the 'Sign In' option.



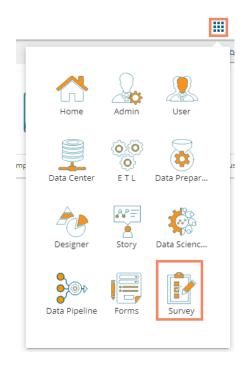
- v) BDB Platform homepage opens.
- vi) The user gets redirected to the BDB Platform homepage.





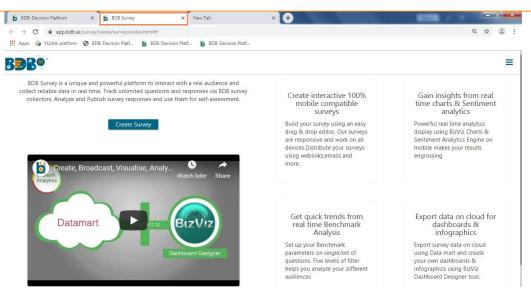
Note:

- a. The above screen opens only for those newly created users who have not yet created any document using the BDB Platform.
- b. If the user has created some documents previously, then the Platform homepage opens displaying the '**My Documents**' page by default.
- vii) Click the 'Apps' 🛄 icon.
- viii) All the available plugin applications get displayed.
- ix) Select the 'Survey' plugin.



x) The Survey homepage opens with the 'Create Survey' option.





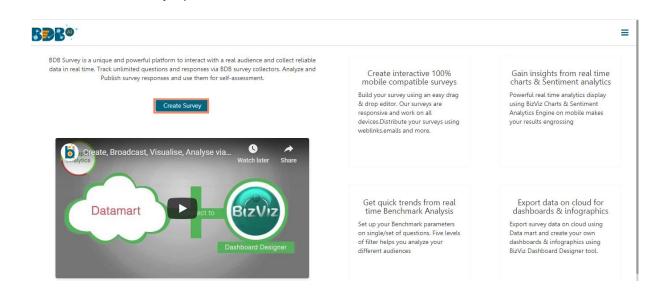
This document aims to describe all the significant Survey components and the related options at details.

## 4. Creating a Survey

This section describes how to design or build a Survey. Creating 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 creates, develops, and maintains a questionnaire for a survey. It describes all the supported features and steps to design a survey.

- i) Navigate to the Survey homepage.
- ii) Click the '**Create Survey**' option.



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



<b>BBB</b> ®		≡
	Create New Survey	Create New Survey From Template
Survey Title :	Enter Survey Title	Customer Satisfaction
Survey Description :	50 characters remaining. Enter Survey Description	Workplace
	1000 characters remaining.	
Welcome Message :	100 daracter remaining.	
	Save Cancel	

#### 4.1. Creating a New Survey

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

	1 Create New Survey
2 Survey Title :	Sample Survey
	37 characters remaining.
3 Survey Description :	Enter Survey Description
	1000 characters remaining.
4 Welcome Message :	
	$\square$ $\blacksquare$ $\blacksquare$ $Ω$ $𝔅$ $𝔅$ Source
	B I S   I <sub>x</sub> } ≟≡ ∶≡   ∃≡ ∃E   99
	Styles - Format - ?
	5 Save Cancel

- iv) A new page opens to design a questionnaire for the created Survey.
- v) The page contains a menu row of which the 'Questions' tab opens by default.



B <b>⊇</b> B <sup>@</sup>		≡
Questions Page Survey Properties Theme	😢 Save All Pages 🔻	2 ≡
Single Answer	+ Insert Page	
Multiple Answer	Sample Survey	
Single Answer Picture		Page 1: Default Page
Multiple Answer Picture		
Yes/No	No Question has been added in this page	
Matrix-Single Answer		
Matrix-Multiple Answer		
Rating Scale	+ Insert Page	
9 Numerical Textbox		
A Textbox		
Comment		
Multiple Textbox		
Contact Details		

#### 4.2. Creating a New Survey using Template

- i) Navigate to the 'Survey Templates' page. Or Choose the 'Create New Survey from Template' option to create a survey.
- ii) Click on a survey name.
- iii) All the available survey templates will be listed with the following details:
  - a. Preview
  - b. Use This Template

Survey Templates		
Customer Satisfaction (2)	Customer Satisfaction : Template List	
Norkplace (2)	Product Customer Satisfaction Survey	Preview Use This Template
	This template is effective for any company looking to gain insight on how th through this survey can be used to better meet customer needs and identify Pages: 1 , Question: 10	
	Customer Service Survey	Preview Use This Template
	Customer service surveys are vital for any company looking to gain insight o understanding their staff's strengths and weaknesses. Pages: 2 , Question: 15	n the relationship between their staff and customers, as well as
Customer Product Customer Satisfaction Survey	Satisfaction Preview Use This Template	
Customer Product Customer Satisfaction	Satisfaction	
Customer Product Customer Satisfaction Survey Pages : 1 , Question : 10 Customer Service Survey Pages : 2 , Question : 15	Satisfaction Preview Use This Template	
Customer Product Customer Satisfaction Survey Pages : 1 , Question : 10 Customer Service Survey Pages : 2 , Question : 15	Satisfaction Preview Use This Template Preview Use This Template	



Note:

- a. By clicking on the '**Preview**' option the user gets to see the preview page of the survey.
- b. The user can preview the survey in Desktop, iPad, and Mobile display mode.

🖵 🗆				
Product Customer Sa	atisfaction Survey			
stomer Page				
Overall, I am very satisfied with the way of the company performed on this product.           Strongly Agree         Agree         Neither Agree Nor Disagree         Disagree	sagree O Strongly [	Disagree		
Please indicate your level of agreement with each of the following statements:	Strongly Agree	Agree	Disagree	Strongly Disagree
Company service representatives are well trained	0	Ó	0	0
Company service representatives are well supervised	0	0	0	0
Service representatives adhere to professional standards of conduct	0	0	0	0
	0	$\cap$	$\cap$	0
Service representatives act in my best interest	0	0	0	0

c. By clicking the 'Use This Template' option the user gets the designing page of the survey.

BBB@		=
Questions Page Survey Properties Theme	😰 Save 🛛 All Pages 🔹	$\mathcal{L}\equiv$
Single Answer	+ Insert Page	
Vultiple Answer	Product Customer Satisfaction Survey	
Single Answer Picture	Page I	1: Customer Page
Multiple Answer Picture	Overall, I am very satisfied with the way of the company performed on this product.	
Yes/No	O Strongly Agree O Agree O Neither Agree Nor Disagree O Disagree O Strongly Disagree	
Matrix-Single Answer		
Matrix-Multiple Answer	Please indicate your level of agreement with each of the following statements: Strongly Agree Agree Disagree Strongly Disagree	۰
Rating Scale	Company service representatives are well trained OOOO	
9 Numerical Textbox	Company service representatives are well supervised OOOO	
	Service representatives adhere to professional standards of OOOO	
A Textbox	Service representatives act in my best interest	
Comment	Overall, I am satisfied with the service representatives	

d. The user can modify the survey information or questionnaire and click the '**Save**' option to save the survey.

Questions Page Survey Properties Theme	B Save All Pages ▼	$\omega^{*}\equiv$
Survey Logo Browse File	+ Insert Page	
Logo Size :	Product Customer Satisfaction Survey	
Logo Position :	Page 1:	Customer Page
Logo Alignment : 🔹 🔹	Overall, I am very satisfied with the way of the company performed on this product.	٠
Survey Title	O Strongly Agree O Agree O Neither Agree Nor Disagree O Disagree O Strongly Disagree	
Product Customer Satisfaction Survey		
14 characters remaining.		
Survey Description	Please indicate your level of agreement with each of the following statements:	•
Description	Strongly Agree Agree Disagree Strongly Disagree	
	Company service representatives are well trained	
989 characters remaining.	Company service representatives are well supervised OOOO	
Welcome Message	Service representatives adhere to professional standards of OOOOO	
	Service representatives act in my best interest	
	Overall, I am satisfied with the service representatives	

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



BDR <sup>®</sup>		=
Search Survey		<u>Create Survey</u>
Product Cust	omer Satisfaction Survey	I 🕹 🗠 🔅
Created On : 04/2	//2020 Completed Responses : 0	
Sample Surv	ey	I 🛆 🗠 🔅
Created On : 04/2	/2020 Completed Responses : 0	

• Other Related Options

lcons	Name	Description			
Ø	Design	Redirects users to design the survey questionnaire			
6	Publish	Redirects users to publish the survey			
$\mathbf{x}$	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. Survey Summary			
		5. Copy Survey			
		6. Delete Survey			

## **5.** Designing a Survey

The 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 the '**Design**' <sup>C</sup>icon.
- iii) The design page opens with various options to develop the survey questionnaire.
  - a. Questions
  - b. Page
  - c. Survey
  - d. Properties
  - e. Save
  - f. Insert Page
- iv) The 'Question' tab opens by default.



#### 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) The 'Questions' tab opens by default.
- iii) Various question-types get displayed on the left pane of the page.
- iv) Page 1 opens as the Default Page.

BBB®		≡
Questions Page Survey Properties Theme	🔁 Save 🛛 All Pages	2* ≡
Single Answer	+ Insert Page	
Vultiple Answer	Sample Survey	
Single Answer Picture		Page 1: Default Page
Multiple Answer Picture	No Question has been added in this page	
Yes/No	No Question has been added in this page	
Matrix-Single Answer		
Matrix-Multiple Answer		
Rating Scale	+ Insert Page	
9 Numerical Textbox		
A Textbox		

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

BBB@		≡
Questions Page Survey Properties Theme	🖹 Save All Pages 🔹	2 ≡
Single Answer	Insert Page	
Multiple Answer	Sample Survey	
Single Answer Picture		Page 1: Default Page
Multiple Answer Picture	Multiple Chains Clarks Annua	
Yes/No	Multiple Choice Single Answer Option 1 Option 2	â
Matrix-Single Answer		
Matrix-Multiple Answer		
Rating Scale	+ Insert Page	

vi) Edit the Question text and other required aspects of the question to add a desired question into the Survey using the '**Properties**' tab (The Properties tab opens by default when we add a question).

Questions Page Survey Properties Theme	E Save All Pages	¥	2 ≡
Question Type MULTIPLECHOICE_SINGLEANSWER		+ Insert Page	
Question Text Select your gender.		Sample Survey	
Answers/Choices			Page 1: Default Page
Options Add Male Temale	Select your gender.		0
Features		+ Insert Page	
Question Design			
Actions			

#### **Available Question Types**



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

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

How long have you been u	ising your current	cell phone?		â
O Less than1 year	O 1-2 years	O 3-4 years	O More than 5 years	

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

Select all the mobile brands you have used so far.						ŵ	
Apple	Samsung	Nokia	Motorola	🗌 Xiaomi	Google		
Others							

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



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





• 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 an end survey question. 'Required' validation can be applied to this question.

Are you a sma	rt phone user? ★	Û
Ves	O №	

• 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.

elect favourite mobile de	vice brand for each opf y	our family member.		
	Apple	Samsung	Xiaomi	Huawei
Father	0	0	0	0
Mother	0	0	0	0
Brother	0	0	0	0
Sister	0	0	0	0
Spouse	0	0	0	0

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

	Talking	Watsapp	Social Media	Internet	SMS	Games
l use my phone for					<ul><li>✓</li></ul>	
My 3 most used applications are (select any 3 options)						
I need to upgrade my plan to use more for						
I use my phone in the office						

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

How the following factors in	fluence your mobile device pur	chase?	
	not at all	somewhat	very much
Price	0	0	0
Screen Size	0	0	0
OS	0	0	0
Brand	0	0	0
Durability	0	0	0

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



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

Please enter the mobile device brand you are using at present
Answer Here

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

lease give feedback of your current mobile brand.	<b>*</b>	
within 10-100words		

• **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.

Mention the factors that you look after in the given brands. Apple	5.
Answer Here	
Samsung	
Answer Here	
Xiaomi	
Answer Here	

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



Fill your details in the below given fields: ★ Name
Name
Company
Company
Address
Address
City / Town
City/Town
ZIP / Postal Code
ZIP/Postal Code
Country
Country
Email Address
Email Address
Phone Number
Phone Number

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

Select your country from the drop-down list. ★	Û
Select an Option •	

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

Select the multiple options using the drop-down list to describes your self in the best possible way. ★	
Kind Honest Hardworking Humble Punctual Team Player	

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

Select the following: ★		1
Best UI	Select an Option 🔻	
Worst UI	Select an Option 🔻	

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



Select the following: ★	
Select a Television Brand from the drop-down	TV Brands •
Select a Mobile Brand from the drop-down	Mobile Brands •

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

Select an aspect of the given ı	<b>mobile device brands</b> Apple	for eac	<b>h family members. ∳</b> Samsung	r	Sony	
Father	Select Option	•	Select Option	•	Select Option	•
Mother	Select Option	•	Select Option	•	Select Option	•
Son	Select Option	•	Select Option	•	Select Option	,
Daughter	Select Option	•	Select Option	•	Select Option	•

• 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. The category of the columns and options provided for drop-down can be different.

Choose relevant aspects about the	<b>Television and Mobile Brands.</b> Television	Mobile	Û
User 1	Select Option	Select Option •	
User 2	Select Option	Select Option •	
User 3	Select Option	Select Option 🔹	

#### Note:

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

Questions	Page	Survey	Properties	Theme					
Question Type									
DROPDO	DROPDOWN								
Question Te	Question Text								
Select yo	ur favourit	e mobile de	evice brand fr	om the					
Answers/0	Choices								
-Mobile	e Brands								
			e and hence in st selected opt						
Options				Add					
Apple									
Samsung									
Huawe	Huawei								
Xiaomi				Û					



- b. The user does not get the drop-down options from the workspace. The options for the drop-down question appears only on the Preview page or while attempting the survey.
- c. If the head value is kept blank, then it displays the first option provided for the drop-down menu by default as the head value.
- **Ranking:** Use the '**Ranking**' type of question when you want to rank different options. The chosen options will be ranked out of the total number of available choices.

Rank the following brands: ★		
Apple	Select Rank V	
Samsung	Select Rank 🔻	
Xiaomi	Select Rank •	

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

How likely is it	that you	would	recom	nend ou	ır comp	any to a	a friend	or colle	eague?				Û
Not at all likely	0	1	2	3	4	5	6	7	8	9	10	Extremely likely	

• 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.

Provide value check for the qulity of Apple Mobile.	â
0 100	
Selected Value: 87	

• **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. The respondent can use the left click of the cursor to provide a digital signature in the given space.

Signature	C	Û

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

www.bdb.ai

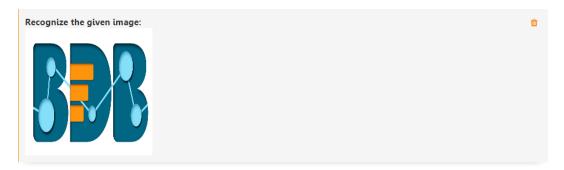


File Upload	Û	
Choose File No file chosen		

• **Date/ Time:** Use this option when you want respondents to provide date and time. The user can access this feature from the 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.

I	Date Time		ir i
	08/13/2019 4:38 PM	×	

• **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.

The survey on mobile will only take 3 minutes of your time. it will give you Real-time Ananlytics and Benchmark Ananlytics.	â

#### 5.1.1. Deleting a Question

Each added question type in the Survey gets the '**Delete**' icon to delete the question once you add it to the survey.

- i) Navigate to the Survey questions in edit or design mode.
- ii) Select a question that you wish to delete.
- iii) Click the 'Delete' icon provided for that question.

Select a mobile brand from the given choices	(
Mobile Brands 🔻	

- iv) A message window appears to assure the action of deletion.
- v) Click the 'OK' option.



app.bdb.ai says		-
Do you want to delete this component ?		
	OK	Cancel

vi) The selected question gets deleted from the survey.

#### 5.2. Properties

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

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

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

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

Questions	Page	Survey	Properties	Theme	
	Question Type MULTIPLECHOICE_SINGLEANSWER				
Question Text Multiple Choice Single Answer					
Answers/C	Choices				
Options				Add	
Option 1					
Option 2					
Orientation: Horizontal 🔻					
Features					
Question Design					
Actions					

- i) Question Type: Question type is pre-selected
- ii) **Question Text**: Question Text can be inserted or modified
- iii) Answers/Choices: 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. The 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.

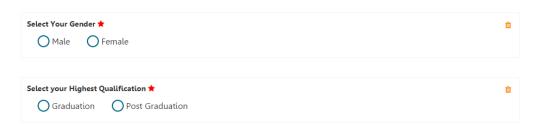
i) Click the '**Features**' provided on the left side of the Properties page.



- ii) The 'Validation' option opens.
- iii) Select **'Required**' from the drop-down menu.
- iv) Question specific Validation message will appear in the below given box.

Features		
Validation	Required •	
Validation Msg		
One Option is Required.		

v) All the validated Questions will appear with the 'Validation' symbol 🎽



#### • Show Comment Box

Comment Box is an optional feature provided under properties.

- i) Click 'Features' provided on the left side of the 'Properties' page
- ii) Select 'Show Comment Box' option by check-marking the box
- iii) Fill in the following information:
  - a. Number of Rows: Set rows by using the 'Stepper' button
  - b. Text Limit: Set text limit using the 'Stepper' button
  - c. Text limit message: Enter a message to display when the text limit is exceeded
  - d. **Comment Head**: Enter a heading for the inserted comment box

Show Comment Box			
Number of Rows (max:20)	: 2		
Text Limit (max:1000) :	200		
Text Limit Message :	You have exceeded the lit		
Comment Head :	Comment		

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

Select Your Gender ★	Û
● Male O Female	
Comment :	
200 characters remaining	



#### • Use Logic

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

- i) Click 'Features' provided on the left side of the 'Properties' screen.
- ii) Select the '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 the '**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.

🗸 Use Logi	c	
skip. Please D	)on't Select Re	will display for question quired Question as cossible same time.
Options Male	Questic <b>v</b>	Manage Skip Questions
Female	None of the Page Jump	SC age Skip Questions
	Question SI	
	Disqualifica End of the s	

The 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 the Survey:** This logic is generally used after the last question given for the survey to generate a 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:

- a. By selecting the 'None of these' option, no logic gets applied to the question.
- b. The '**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 (X-Large, Large, Medium, Larger, Smaller, Small and X-Small options are supported)
- vi) Option Font Color: Set font color using the available color menu
- vii) Radio Background: Set background color for radio buttons using the available color menu
- viii) Radio Border: Set border color for radio buttons using the available color menu

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

- 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 the 'Done' option.
  - vi) The question will be moved on the selected page.

Actions		
Select Action :	None	¥
Page :	Page 1: Default Page	Ŧ
		Done



#### 5.3. Inserting a New Page

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

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

🖺 Save All Pages	Ŧ		2 ≡
		+ Insert Page	
N.A.		Feedback Survey	
			Page 1: Default Page
Select Your Gender ★			Û
🔘 Male 🛛 Female			
Comment :			
200 characters remaining			- 10

#### 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.

🖺 Save All Pages	T		2 ≡
	<b>B</b> RA		
0	0	0	
Multiple Choice Single Answer			۵
Option 1 Option 2			
	+	Insert Page	

#### Note:

- a. The newly added page will open with a message that no question has yet been added to that page.
- b. The user can delete a page by clicking on the '**Delete Page**' option <sup>III</sup> 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



Questions Page Survey Properties Theme	Page 1: Default Page	28
Page Title *	+ Insert Page	
Page Description	Sample Survey	
	Page 1: Default Page	Û
Page Logic Page skip logic enables you to redirect people to another page automatically and unconditionally. The skip is triggered when the respondent clicks the Next button. If you have any question skip logic on this page, the question logic will take precedence.	Select Your Age Group O Below 18 Years O 18-25 Years O 26-35 Years O 36-50 Years O 51-65 Years O Above 65 Years	Û
Select Next Page : No Logic •	Select Your Gender     Male   Female   Others	Û

#### 5.5. Survey Option

The 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

Jestions Page	Properties	meme	V Pictures	Public Pictures > San	mple Pictures	✓ 49 Search 5	Sample Pictures
Survey Logo		- U	Organize 🔻 New fold	ler			L - 1 0
Browse File			Favorites	Pictures librar	у	ŀ	Arrange by: Folder 🔻
.ogo Size :	Actual Size	•	iCloud Photos				
.ogo Position :	Default	•	ICloud Drive     E     Desktop     Recent Places			A set of	Constant of the second
.ogo Alignment :	Left	- T	<ul> <li>OneDrive</li> </ul>	Chrysanthemum	Desert	Hydrangeas	Jellyfish
Survey Title Sample Survey		*	Calibraries ☐ Documents ♪ Music	Koala	Lighthouse	Penguins	Tulips
7 characters remaining.			Pictures	Kodia	Lighthouse	Penguins	ruips
Survey Description			Videos 🗸				
Enter Survey Descr	iption		Filer	name: Tulips		Image Fil     Ope	
1000 characters remainin	g.						
Velcome Message			Mate		Others		

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

Questions Page Surve	y Properties Theme	🖺 Save	Page 1: Default Page	¥		$\mathcal{L}\equiv$
Survey Logo Browse File	<b>a</b>				+ Insert Page	
Logo Size :	Actual Size 🔻				Sample Survey	

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

Note: The survey logo can be replaced if desired.



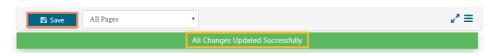
#### 2. Editing the 'Create Survey' Screen from Survey Option

- i) Click on the 'Survey' option from the Menu Row
- ii) The following details of the '**Create Survey**' page get displayed on the left side of the screen below the Survey Logo.
  - Survey Title
  - Survey Description
  - Welcome Message
- iii) The user can edit the Survey Logo and the above-mentioned survey details from the 'Survey' option.

Questions	Page	Survey	Properties	Theme
Survey Log Browse				ŵ
Logo Size :			Actual Size	•
Logo Posit	ion :		Default	•
Logo Align	ment :		Left	•
Survey Title	e			
Sample	Survey			*
37 characte	rs remainir	ng.		
Survey Des	cription			
Enter St	urvey De	scription		4
1000 charac	ters remai:	ning.		
Welcome N	Message			
86		T (W	A	<b>₿</b> , •
6 6			Ω	8

#### 5.6. Saving a Survey

- i) Click on the 'Save' option from the Menu Row to save the changes or modifications.
- ii) A message appears to confirm the action of saving the updates.



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

B	à			
Questions	1	Survey	Properties	Theme
0	Single Ans	wer		
<ul> <li>Image: A start of the start of</li></ul>	Multiple Ar	nswer		
	Single Ans	wer Pictu	e	
2	Multiple Ar	nswer Pict	ure	
	Yes/No			
	Matrix-Sing	gle Answe	r	
	Matrix-Mul	tiple Ansv	ver	
=	Rating Scal	e		
9	Numerical	Textbox		
A	Textbox			

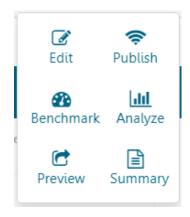


**Note:** While inserting questions to a survey, it will save only those questions for what '**Save**' option was clicked.

- Other Related Options:
  - Click the 'Maximize' icon  $\checkmark$  to display the survey questions in full screen (the Maximize icon changes into the 'Minimize' icon  $\checkmark$  as shown in the following image):

All Pages	•						×
			+ Insert P	age			
			Sample S	Survey			
						Page 1: Default Page	Û
Select Your Age Group							8
O Below 18 Years	0 18-25 Years	O 26-35 Years	O 36-50 Years	O 51-65 Years	Above 65 Years		
Select Your Gender							•
O Male O Femal	e Others						
Which type of cell phone d	o vou use?						
-	Normal Phone						

- Click the 'More Options' icon  $\equiv$  to 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 the designing part of a survey gets over, it can be published via Weblink 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 the 'Create' option.

Publish Your Survey		+ =
Publish Survey		
Selected Survey :	Sample Survey	
Publish Name :	Sample Survey	*
	37 characters remaining.	
Start Date :	04/30/2020	*
Expiry Date :	05/11/2020	*
Expiry Date Message :	Sorry, Survey is expired. Please contact author of this survey.	*
	Create	h

- vi) A message appears to inform that the publisher has been created.
- vii) The Survey gets added to the '**Publish Your Survey**' list page. The user gets two options to publish the survey either by using Weblink Collector or Email Collector.

Publish Your Survey		+ =
Sample Survey		o 🖉 🖉 🖬
	Publish Created Successfully	
1	Now Create Collector Using :	
	WebLink Collector OR Email Collector	

• Other Related Options:

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

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

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



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

BDB Survey provides two ways to access collector option:

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

### Now Create Collector Using :

WebLink Collector OR Email Collector

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

#### OR

- i) Navigate to the 'Publish Your Survey' list.
- ii) Four options will be provided next to the published name of a survey.
- iii) The first two options (  $\bigcirc$  and O ) can be used to create a new collector.

#### 6.3. Creating a Web Link Collector

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

Create WebLink Collector		
Collector Name :	Mobile Trends Surey	*
	31 characters remaining.	
Close Collector Message :	Survey is closed by the administrator. Please contact the administrator.	*
	Create	

- v) A message appears to inform that the survey creation of the Web Link Collector.
- vi) The Web Link Collector gets created and appears below the message.

	Web Link Collector Created Successfully
WebLink URL	
	https://qa.bdb.ai/survey/views/survey/attempt.html#/attempt/1111@454623232@1588212122317

vii) The Web Link Collector gets added to the 'Publish Your Survey' list.

Sample Survey	<b>e</b> @ <b>e û</b>
O Mobile Trends Surey	• 2 • 1



#### • Related Options:

lcon	Name	Allotted Function
💽 or 🔾	Switched On/Off	Switch On/Off button to enable or disable the Weblink.
	View URL Link	Displays the URL (link) for the weblink collector.
ß	Edit Weblink Collector	Allows editing the Weblink Collector settings for the
		end-users.
Û	Delete Collector	Deletes the created weblink collector.

#### 6.4. Creating an Email Collector

- i) Click the '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 the '**Create**' option.

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

- v) A message appears to inform about the creation of an email collector.
- vi) A window opens asking to add a recipient for email collector.
- vii) The Email Collector will be successfully created and added to the 'Publish Your Survey' list.

Publish Your Survey			+ =
Sample Survey	o 🖉 🛈		Email Collector Created Successfully
@ Mobile Trends Survey	€ + ⊠ @ 🛍	Add Recipient For Collector	
Mobile Trends Surey	<b>)</b> 🖉 🖉 🛍	Collector Name :	Mobile Trends Survey
		Add Recipients :	From Contacts Add Manually
			Add Recipients
		Email Subject :	*
			50 characters remaining.



#### • Related Options:

lcon	Name	Allotted Function
💽 or 그	Switched On/Off	
+	Add Recipients	Adds Recipients to email collector
$\square$	Track Email Responses	Tracks the collected email responses
ľ	Edit Email Collector	Edits collector settings for the end-users
Û	Delete Collector	Deletes the created Email collector

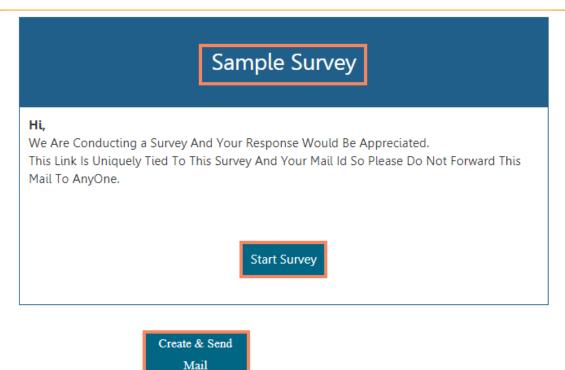
#### 6.4.1. Adding Recipients for Email Collector

- 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 and click the 'Add Recipients' option.

Add Recipient For Colle	ector
Collector Name :	Mobile Trends Survey
Add Recipients :	From Contacts Add Manually
	Add Recipients

- 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 gets sent to the added recipient(s).

Note: The 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 the 'From Contacts' option.
- iii) Click the 'Add Recipients' option provided below the box.

dd Recipient For Colle	ector
Collector Name :	Mobile Trends Survey
Add Recipients :	From Contacts 🔿 Add Manually
	Add Recipient

- iv) The **Contact Groups window** opens listing all the existing Contact groups.
- v) Select the contact group(s) from where you wish to get the contacts by marking the checkbox.
- vi) Click the '**Done**' option.



	Contact Groups	×
*		
> Test Group		
> BDB Group		
> Survey Group		<ul> <li>✓</li> </ul>
	Done	

vii) The contacts from the selected Contact Group(s) get added as recipients.

Add Recipient For Collec	tor		
Collector Name :	Mobile Trends Survey		
Add Recipients :	From Contacts 🔿 Add Manually		
	nobim@pqr.com;Nobita;Mitsuba	×	
	mic.luc@abc.com;Michel;Luqua	×	
	jdp@xyz.com;John;Dep	×	
			Add Recipients

#### 2. Adding Recipients Manually

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

Add Recipient For Collector	
Collector Name :	Mobile Trends Survey
Add Recipients :	O From Contacts
	william.martin@xyz.com; william; martin
	(If adding manually please Enter one recipient details in one line in the order mailid, firstname, lastname seprated by semicolon(;) For Example - john@gmail.com;John;Peterson )

#### 6.5. Editing Collector(s)

- i) Navigate to the 'Publish Your Survey' list.
- ii) Click the 'Edit' icon provided for a survey collector.



Publish Your Survey	
Mobile Trends Survey	Q @ Z 🛍
@ Mobile Trends Survey	C + 🖂 🕝 🛍

- iii) The 'Edit Collector' option appears 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 the 'Edit' option provided at the end to save the updates.

Edit Email Collector		
Collector Name :	Mobile Trends Survey	*
	30 characters remaining.	
Close Collector Message :	Survey is closed by the administrator. Please contact the administrator.	*
Collector Settings :		li
Result's Analytics :		
BizViz Analytics for Ei Benchmark Analysis f Custom Thank You : False		
Survey End Page : Standard End Page		
	Edit	

#### • 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 the 'BizViz Analytics for End User' option by check-marking the box.
- iii) Carefully select the following 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



Colle	ollector Settings :			
Resu	Result's Analytics :			
	BizViz Analytics for End U	ser		
	Select Questions :	Select questions for End user		
	Public Link Status :	ACTIVE O IN-ACTIVE		
	Public URL :	https://app.bdb.ai/survey/views/survey/attempt. XgUmiWVS0OIKK	.html#/SurveyAnalyticalResult/bbTKko7F8vwND5Kxh3D	
	Would you like to display result	s, if collector is closed or publish expired :	Ves No	
Would you like to display Filters or filtered data of a View to end user :		s or filtered data of a View to end user :	Ves No	

#### 2. Editing Benchmark Analysis for End-User

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

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

#### b. Display Result Option:

- i. Choose either of the choices out of 'Yes' or 'No' options
- ii. Selecting '**Yes**' will display the result to the end-user, even if the collector is closed or publish has been expired

#### c. Display Filter Option:

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

✓	Benchmark Analysis for End User		
	Public Link Status:	ACTIVE O IN-ACTIVE	
	Public URL: https://www.bizvizsurvey.com/views/survey/attempt.html#/SurveyAnalyticalResult/r6/ iTWkLImpmgYU4sXRxL-BfEJ9ZWY9-7RSJVe1		yAnalyticalResult/r6xc-
	Would you like to display results, if collector is closed or publish expired:		Yes O No
	Would you like to display Filter to end user: (IF you select Yes then filter created in analysis will not apply)		Ves No

Note: The same set of steps can be followed to edit Collector Settings for Weblink and Email collectors.

#### 6.6. Deleting Collector(s)

- i) Navigate to the 'Publish Your Survey' list.
- ii) Click the '**Delete**' <sup>III</sup> icon provided next to a collector name.
- iii) A pop-up window will appear to confirm the deletion.



iv) Click 'OK.'

app.bdb.ai says		
Are You Sure, You want to Delete The Collector	r?	
	ОК	Cancel
20.1		

v) The selected collector gets deleted.

Note: The same set of steps can be followed to delete the Weblink and Email collector.

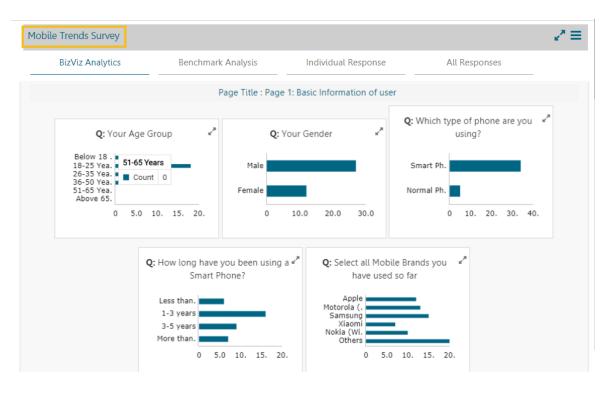
# 7. Analyzing Result for a Survey

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

- i) Navigate to the survey list.
- ii) Click the 'Analyze Result' 🜌 icon provided for a listed survey.
- 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.

www.bdb.ai



## 7.2. Benchmark Analysis

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

Mobile Trends Survey			2* ≡
BizViz Analytics	Benchmark Analysis	Individual Response	All Responses
			Total Response :39
Gauge	Garand Matters not Price	Smartphone Addiction (in Hrs/Day	Phone As a Computing Device

## 7.3. Individual Response

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

obile Trends Survey					~
BizViz Analytics	Benchmark Analysis	Individual Respons	e	All Responses	
Jump to : Response 1	Cisplaying 1 of 39 Resp	onses 🔪		Delete Response	
Collector Title : Mobile Trends Collector Type : WEB_LINK Attempted On : 04/12/2016	Survey	Completion Status : Collector Status : IP Address:	COMPLETED OPEN 115.119.248.130		
Page Title: Page 1: Basic Info Q: Your Age Group Below 18 Years,					
Q: Your Gender					
Female,					
Q: Which type of phone are	you using?				
Normal Phone,					

## 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 the 'Export in Excel' option.



- b. All the responses will be exported in an Excel file.
- c. Open the exported file.

BBB®®								=	=
Create Filter			+	Mobile Trends Survey				2 ≡	=
Filter	Show	_		BizViz Analytics	Benchmark Analysis	Individual Response	All Responses		
Filter Name : *	Filter Name								
Select View : *	Default View		•		You can view all responses in ex	cel and csv format by clicking b	elow buttons.		
Select Filter Type : *	Select Filter Typ	pe	¥		Export in Excel	Export in CSV			
* Please first select all r	nandatory fields, To	process	filter!!						
Saved View			+						
Default View	0	• 🛃	Û						
Dobile_Trends_Su.	xlsx ^						Show	all	) :

d. The recorded responses get displayed in the excel format.

Aı	utoSave 🧿	<del>ه</del> ا						N	lobile_Trend	ls_Survey_Al	l_Data - Prol	tected View	- Excel		4			Sign in	<b>E</b>	- 6	
le	Hom	ne Inse	ert Pag	e Layout	Formul	as Dat	a Revie	w View	Help	,∕⊂ se	arch								🖻 Share	Con	nmen
7	PROTECTE	ED VIEW B	e careful—f	iles from the	Internet ca	an contain v	ruses. Unles	s you need to	edit it's safe	er to stav in P	Protected Vie	w. Enz	able Editing								
	TROTECTE		c carciar 1	incomo in an	. internet et	in contain r	ruses ones	s you need to	cuit, it 5 suit	in to stay in i	Totected The		Ibic Editing								
L			× 🗸	f <sub>x</sub> Re	sponseID																
	Α	в	с	D	E	F	G	н		L L	к	L I	м	N	0	Р	Q	R	s	т	
R	esponse	FromIP	Collector	Attempte	Collector	r1 Collecto	rt EmailId	Your Age	Group	-				Your Gen	der	Which typ	e of phone	How long	have you	been using	g a Sn
-	*									26-35 Year	36-50 Year	51-65 Year	Above 65	Male	Female	Smart Pho					
	9207829	115.119.24	9109505	04/12/201	WEB_LIN	IK Mobile T	'n	Below 18							Female		Normal Ph		1-3 years		
	9207830	115.119.24	9109505	04/12/201	WEB_LIN	IK Mobile T	'n			26-35 Year				Male			Normal Ph		1-3 years		
	9207831	182.156.90	9109505	04/12/201	WEB_LIN	IK Mobile T	'n			26-35 Year				Male		Smart Pho					Mo
	9207832	182.75.173	9109505	04/12/201	WEB_LIN	IK Mobile T	'n	Below 18						Male			Normal Ph	Less than			
	9207833	182.75.173	9109505	04/12/201	WEB_LIN	IK Mobile T	'n		18-25 Yea						Female	Smart Pho			1-3 years		
	9207834	115.119.24	9109505	04/12/201	WEB_LIN	IK Mobile T	'n			26-35 Year				Male		Smart Pho				3-5 years	
	9207835	115.119.24	9109505	04/12/201	WEB_LIN	IK Mobile T	'n			26-35 Year				Male		Smart Pho				3-5 years	
	9207836	null	9109505	04/12/201	WEB_LIN	IK Mobile T	'n				36-50 Year			Male		Smart Pho					Mo
						IK Mobile T				26-35 Year					Female	Smart Pho			1-3 years		
	9207838	115.119.24	9109505	04/12/201	WEB_LIN	IK Mobile T	'n		18-25 Yea					Male		Smart Pho				3-5 years	
						IK Mobile T				26-35 Yea					Female	Smart Pho			1-3 years		
	9207840	115.119.24	9109505	04/12/201	WEB_LIN	IK Mobile T	'n			26-35 Year				Male		Smart Pho			1-3 years		
						IK Mobile T			18-25 Yea					Male		Smart Pho			1-3 years		
						IK Mobile T				26-35 Year				Male		Smart Pho					Mo
						IK Mobile T			18-25 Yea					Male		Smart Pho			1-3 years		
						IK Mobile T				26-35 Yea				Male		Smart Pho					Mo
						IK Mobile T				26-35 Year				Male		Smart Pho				3-5 years	
						IK Mobile T				26-35 Year					Female	Smart Pho			1-3 years		
						IK Mobile T			18-25 Yea						Female	Smart Pho			1-3 years		
						IK Mobile T			18-25 Yea					Male		Smart Pho			1-3 years		
						IK Mobile T			18-25 Yea					Male		Smart Pho				3-5 years	
						IK Mobile T			18-25 Yea					Male		Smart Pho			1-3 years		
2	20250828	106.51.66.	9109505	09/08/201	WEB_LIN	IK Mobile T	r(		18-25 Yea					Male			Normal Ph	Less than			_

### 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 format.

## 7.5. 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.



BBB@			Croat	te New View		×
Create Filter			2 Creat	te new view		
Filter		Create View :	New View			ns
Filter Name : * Filt Select View : * De:	-				3 Create Clos	e
Select Filter Type : * Sel	ect Filter Type 🔻			Export in Excel	Export in CSV	_
* Please first select all mandate	ory fields, To process filter!!					
Saved View						
Default View	• 🗭 🛍					

- 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.

View Created Successfully.					
Create Filter	+				
Filter	Show				
Filter Name : *	Filter Name				
Select View : *	Default View 🔻				
Select Filter Type : *	Select Filter Type 🔹				
* Please first select all m	nandatory fields, To process filter!!				
Saved View	+				
Default View	• 🖉 🛍				
New View	0 🗹 🛍				

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

## 7.6. 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.

## 7.6.1. Creating a Filter

- i) Navigate to the Analyze Result page.
- ii) The 'Create Filter' window displays on the left side of the page.
- iii) The Filter tab opens by default.
- iv) 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. The user needs to provide filter type related information as per the given instruction for each selected filter type.
- v) Click the 'Create Filter' icon.

Create	Filter	+
	Filter	Show
Filt	er Name : *	Filter
Se	lect View : *	Default View 🔻
Select F	ilter Type : *	Filter by Collector
Select (	Collectors to f	ilter response : *
<b>~</b>	Real Survey C	Collector
	Test Collecto	r
		🖺 Create Filter

- vi) The newly created filter gets listed under the 'Saved View' window.
- vii) A message appears to inform the same.

Filter Cre	ated Successfully !!!
Create Filter	+
Filter	Show
Filter Name : *	Filter Name
Select View : *	Default View 🔻
Select Filter Type : *	Select Filter Type 🔹
* Please first select all m	nandatory fields, To process filter!!
Saved View	+
Default View	۵ 🗹 🛍
Gender Filter	• 🖉 🛍
Filter	• 🕑 🛍

## 7.6.2. Managing a Created Filter

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

lcon	Name of the Icon	Function



•/ •	Applied/ Apply button	Activates or deactivates the applied filter rules.
I Contraction of the second se	Edit	Modifies or changes the filter name, filter view, and
_		choices for the filter types.
Ŵ	Delete	Removes the selected filter.

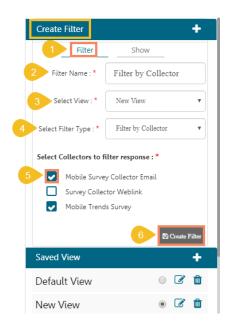
## 7.6.3. Filter Logic

- A single filter rule uses 'OR' logic within the filter.
   E.g., the filtering 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.

## 7.6.4. Filter Types

## 1. Filter by Collector:

- The users can check the response of a specific collector by applying this filter.
- Create the filter by following the given steps:
  - 1. Open the 'Filter' tab (It opens by default).
  - 2. Provide the Filter Name.
  - 3. Select a View.
  - 4. Select the '**Filter by Collector**' option from the drop-down.
  - 5. Select Collector to filter response by marking in the checkbox.
  - 6. Click the 'Create Filter' option.
- Multiple collector filters can be selected at a time.



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

#### 2. Filter by Completeness

It filters responses by their status



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

Create Filter	+
1 Filter	Show
2 Filter Name : *	Filter
3 Select View : *	New View 🔻
4 Select Filter Type : *	Filter by Completeness 🔻
5 Select Response Stat	tus to filter response : *
Completed R	esponses
Not Complete	ed
Attempted Re	esponses
Disqualified F	lesponses
	6 🕒 Create Filter

Note: The user can select the multiple response status to filter the responses.

#### 3. Filter by Respondent Metadata

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

Create Filter	+
1 Filter	Show
2 Filter Name : *	Filter
3 Select View : *	New View 🔻
4 Select Filter Type : *	Filter by Respondent MetaD: 🔻
5 Respondent Metadata to filter response : *	
IP Address :	XXX.XXX.XXX
Email Address:	mick.brwon@abc.com
First Name :	Michel
Last Name:	Brown
Note: Use of property like Email Address, First Name and Last Name will be useful to filter responses of "Email Collector".	



## 4. Filter by Time

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

Create Filter	+
1 Filter	Show
2 Filter Name : *	Filter
3 Select View : *	New View 🔻
4 Select Filter Type : *	Filter by Time Period 🔹
5 Select Date period to	filter response : *
Start Date :	05/07/2020
End Date :	05/11/2020
	6 🕒 Create Filter

#### 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.

Create	Filter	+
	Filter	Show
2 Filte	r Name : *	Filter
3 Sel	ect View : *	New View
4 Select Fi	lter Type : *	Filter by Skipped Questic 🔹
5 Select Q	uestion to fil	ter response : *
	Your Age Grou	p
<b>~</b>	Your Gender	
	Which type of	phone are you using?
	How long have you been using a Smart Phone?	
	Select all Mobil	le Brands you have used so far
	Would you switch to Another Brand if it offered similar features at a 20% lower cost?	
	The factor that most influenced your Phone Purchase:	
	On an average day, how long do you use your	
		6 Create Filter

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#### 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).

Create Filter	+	
1 Filter	Show	
2 Filter Name : *	Gender Filter	
3 Select View : *	New View 🔻	
4 Select Filter Type : *	Filter by Question and Ar 🔹	
5 Select Question : *	Your Gender 🔻	
6 Select Option :		
Male		
O Female		
	7 🖹 Create Filter	

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

Filter	Show
Filter Name : *	Filter
Select View : *	Default View
Select Filter Type : *	Filter by Question and Az
Select Question : *	Give your comment 🔹
Matching Level :	All Words 🔻
Matching Words :	
satisfaction, sr	nart phone



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

Create Filter		+
Filter	Show	
Filter Name : *	Filter	
2 Select View : *	New View	•
3 Select Filter Type : *	Filter by Question and Ar	T
4 Select Question : *	Please provide your feedt	•
5 Matching Level :	Any Word	•
6 Matching Words :		
satisfied, mobil	le,	
	7 🖹 Create F	ʻilter

- 3. Multiple Textbox:
  - a. Responses can be filtered by matching the entered text from Users' comments for this question type.
  - b. This question type is the 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' comments 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



Show Filter Default View
Default View 🔻
Filter by Question and Ar 🔹
Provide your Address 🔹 🔻
Local Address 🔹
Any Word 🔹

- 4. Contact Details:
  - a. Responses can be filtered by matching the entered text from Users' responses 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' information for only one row of the question and one matching level at a time.
  - d. Levels on which the text has been matched are:
    - i. All Words
    - ii. Any Word
    - iii. Exact Phrase



Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Provide your Contact Det 🔹 🔻
Choose a Row:	City / Town 🔻
Matching Level :	All Words 🔹
Matching Words :	
Bangalore	
	🖺 Create Filter

#### 5. Numerical Textbox:

- a. Responses can be filtered by matching the entered number from Users' responses.
- b. Responses can be filtered by a given number in the filter with all responses to this question.
- c. Constraints on which this filter will be applied are:
  - i. Greater than
  - ii. Less than
  - iii. Equal to (default option)

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Provide the Area Pincode 🔹 🔻
Matching Level :	Equal to 💽
Matching Words :	
239085	\$
	🖺 Create Filter



- 6. Slider:
  - a. Responses can be filtered by matching the entered number from Users' responses.
  - b. This question type is the 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 to this question.
  - d. The constraints on which this filter will be applied are:
    - i. Greater than
    - ii. Less than
    - iii. Equal to

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	How likely would you rec 🔻
Matching Level :	Greater than
Matching Words :	
7	\$
	🖺 Create Filter

- 7. Date and Time:
  - a. Responses can be filtered by matching the entered date from Users' responses.
  - b. This question type is the 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 to 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 to the selected date.



Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Date Time
Matching Level :	Exactly 💽
Select Date/Time	
05/04/2020 4:3	38 PM
	🖺 Create Filter

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

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Multiple Choice Single A 🛛 🔻
Select Option :	
Option 1	
Option 2	
Option 3	
Option 4	
Option 5	
	🖺 Create Filter

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

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Yes/No 🔻
Select Option : Ves No	🖺 Create Filter

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

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

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

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Single Answer Picture 🔻
Select Option : Option 1 Option 2	
	🖺 Create Filter

- **11. Multiple Answer Picture:** 
  - a. Responses can be filtered by matching the selected option from the Users' response.



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

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Multiple Answer Pictures 🔹
Select Option :	
<ul> <li>Option 1</li> </ul>	
Option 2	
Option 3	
	🖺 Create Filter

#### 12. Net Promoter Score:

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

Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Answi
Select Question : *	How likely is it that you wou 🔻
Select Option :           Detractors (0-6)           0 - Not at all           1           2           3           4           5           6           Passive (7-8)           7           8           Promoters (9-10)           9           10 - Extreme	-
	🖺 Create Filter



- 13. Multiple Choice Multiple Answer:
  - a. Responses can be filtered by matching the selected option from the Users' response.
  - b. The users can select multiple options to filter the responses. Apply 'OR' logic on the selected options.

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Multiple Choice Multiple 🔻
Select Option :	
<ul> <li>Option 1</li> </ul>	
Option 2	
Option 3	
Option 4	
	🖹 Create Filter

#### 14. Rating Scale:

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

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Rating Scale Type Answe 🔻
Select Row :	Row 1 •
Select Column :	
🔘 Column 1	
O Column 2	
O Column 3	
	🖺 Create Filter

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 a row value from the drop-down menu and any one-column from the radio box. Based on this selection response will be filtered.
  - c. Each selection is mandatory.

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Matrix Type Single Answ 🔻
Select Row :	Row 1
Select Column :	
O Column 1	
O Column 2	
O Column 3	
	🖺 Create Filter

#### 16. Matrix Multiple Answer Per Row:

- a. Responses can be filtered by matching the selected option from the Users' response.
- b. The users can select a row value from the drop-down menu and a column from the checkbox. Based on this selection response will be filtered.
- c. Each selection is mandatory.

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹 🔻
Select Question : *	Matrix Type Multiple An 🔹
Select Row :	Row 1 🔹
Select Columns :	
Column 1	
Column 2	
Column 3	
Column 4	
Column 5	
	🖺 Create Filter



#### 17. Ranking:

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

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Ranking
Select Row :	Option 3 🔹
Select Column :	
<b>O</b> 2	
O 3	
	🖺 Create Filter

### 18. Dropdown:

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

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Az 🔹 🔻
Select Question : *	Dropdown Type Questior 🔹
Select Option :	
Option 1	
O Option 2	
O Option 3	
O Option 4	
	🖺 Create Filter



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

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Dropdown Multiple Selec 🔻
Select Option :	
Option 1	
Option 2	
Option 3	
Option 4	
Option 5	
	🖹 Create Filter

#### 20. Multiple Dropdown Same Option:

- a. Responses can be filtered by matching the selected option from the Users' response.
- b. The users can select a row value from the drop-down (i.e. 'drop-down head') one column from the radio box to filter responses. Based on this selection response will be filtered.
- c. Each selection is mandatory.

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Multiple Dropdown-Sam
Select Row :	Dropdown Head 1
Select Column :	
Option 1	
Option 2	
Option 3	
O Option 4	
O Option 5	
	🖺 Create Filter



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

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	Multiple Dropdown-Diffe 🔹
Select Row :	Dropdown Head 1
Select Column :	
O Option 1	
Option 2	
O Option 3	
Option 4	
Option 5	
	🖺 Create Filter

#### 22. Matrix of Dropdown Same Option:

- a. Responses can be filtered by matching the selected options from Users' responses.
- b. The users can select a row value, one column value from the drop-down menu, and one option from the radio box. Based on this selection response will be filtered.
- c. Each selection is mandatory.

Create Filter	+
Filter	Show
Filter Name : *	Filter
Select View : *	Default View 🔻
Select Filter Type : *	Filter by Question and Ar 🔹
Select Question : *	MATRIX Dropdown-San 🔻
Select Row :	Row 1
Select Column :	Col 1 🔹
Select Option :	
Option 1	
Option 2	
O Option 3	
	🖺 Create Filter



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

Create Filter +		
Filter	Show	
Filter Name : *	Filter	
Select View : *	Default View 🔻	
Select Filter Type : *	Filter by Question and Ar 🔹	
Select Question : *	MATRIX Dropdown-Difl 🔹	
Select Row :	Row 3 🔻	
Select Column :	Col 2 🔻	
Select Option :		
Option 1		
Option 2		
Option 3		
Option 4		
	🖺 Create Filter	

- 24. Parent-Child Drop-down for Level 2:
  - a. Responses can be filtered by matching the selected options from Users' responses.
  - b. Users must select any one option from the 'First Level' drop-down menu and one option from the 'Second Level' drop-down menu. Based on this selection response will be filtered.
  - c. Each selection is mandatory.

Create Filter		+
Filter	Show	
Filter Name : *	Filter	
Select View : *	Default View	•
Select Filter Type : *	Filter by Question and Ar	٣
Select Question : *	Parent Child Dropdown	Ŧ
Select First Level :	Level 1 Option 1	٠
Select Second Level :	Level 2 Option 1	¥
	Create	Filter

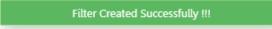


- 25. Parent-Child Drop-down for Level 3:
  - a. Responses can be filtered by matching the selected options from Users' responses.
  - b. Users must select one option from the 'First Level' drop-down menu, one option from the 'Second Level' drop-down menu, and one option from the 'Third Level' radio box. Based on this selection response will be filtered.
  - c. Each selection is mandatory.

Create Filter		÷
Filter	Show	
Filter Name : *	Filter	
Select View : *	Default View	•
Select Filter Type : *	Filter by Question and Ar	•
Select Question : *	Parent Child Dropdown	•
Select First Level :	Level 1 Option 2	•
Select Second Level :	Level 2 Option 11	•
		Filter

#### Note:

- a. Some Question types are not added in this filter type such as Signature, File Upload, Image, Descriptive.
- b. After clicking the '**Create Filter**' option a success message should appear for all the filter types to assure that the filter has been created.



## 7.7. 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 'Create Filter' panel on the Analyze Result page.
- ii) Select the '**Show**' tab.

Create	Filter +		
	Filter Show		
'SLIDER', 'D 'CONTACT questions a	Note: 'TEXTBOX', 'DESCRIPTIVE', 'NUMERICAL_TEXTBOX', 'SLIDER', 'DATE_TIME', 'DIGITAL_SIGNATURE', 'CONTACT_DETALS', 'MULTIPLE_TEXTBOX', 'IMAGE' types of questions are not displayed in the BizViz Analytics tab. All these questions are available in Individual Response.		
Page			
Page	: Basic Information of user		
<b>~</b>	Your Age Group		
<b>~</b>	Your Gender		
<b>~</b>	Which type of phone are you using?		
<b>~</b>	How long have you been using a Smart Phone?		
✓	Select all Mobile Brands you have used so far		



- iii) All the Survey questions get listed.
- iv) Select questions by marking the checkboxes provided next to the questions.
- v) Click the 'Update Show' option.
- vi) The results for the selected questions get displayed on the analysis result page.

Create Filter +		
Filter	Page Title : Page 1: Basic Information of user	
Nor: TD/TB/OX, DECRIFINE: NUMRICAL_TD/TB/X, SUDR: DATE:INF: 01/141.SURVINE: CONTACT_DTNLS: YMU.TINE_TD/TB/X.TWACE types of questions are not displayed in the BitViz Analytics tab. All these questions are available in Individual Response.	Q: How long have you been using a " Smart Phone? Q: Select all Mobile Brands you have used so far	2
Page	Less than.	
Page 1: Basic Information of user	3-5 years 0 10.0 20.0	
Your Age Group	0 5.0 10. 15. 20.	
Which type of phone are you using?		
How long have you been using a Smart Phone?		
Select all Mobile Brands you have used so far	Page Title : Page 2: Mobile Usage	
Page 2: Mobile Usage	<b>Q:</b> On an average day, how long do you * <sup>n</sup>	
Would you switch to Another Brand if it offered similar features at a 20% lower cost?	use your Phone? Q: You are taking this Survey on a:	κ.
The factor that most influenced your Phone	< 1 Hour 1-2 Hours 2-3 Hours	
On an average day, how long do you use your Phone?	3-4 Hours Tablet 4-5 Hours Shore Hours Hours Hours Hours Hours	
You are taking this Survey on a:	0 4.0 8.0 2.0 6.0 10.0 0 10. 20. 30. 40.	
Page 3: Smartphone Usage		

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 the 'Settings' 🍄 icon for options.
- iii) Select the '**Preview Survey**' option.
- iv) The Preview of the selected survey opens.

#### BBR@

Search Survey	<u>Create Survey</u>
Product Customer Satisfaction Survey	C 🕰 🗠 🐯
Created On : 05/05/2020 Completed Responses : 1 Not Completed Responses : 6	Preview Survey Benchmark
Demo Survey 20 April	🐼 🟠 🛃 Manage Datamart
Created On : 04/20/2020 Completed Responses : 0	Survey Summary Copy Survey
Feedback Survey	🕼 🔂 📈 Delete Survey

- v) Select one display option from the top of the page.
- vi) The Survey questions get displayed in the selected preview mode.



<b>P</b> 🕕 🛛
Product Customer Satisfaction Survey
Customer Page
Overall, I am very satisfied with the way of the company performed on this product.
O Strongly Agree O Agree
Neither Agree Nor Disagree     Disagree
O Strongly Disagree

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

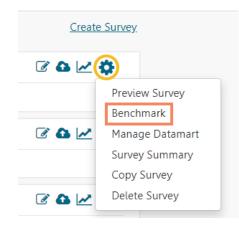
Note: By default, the Desktop preview will open.

## 8.2. Benchmark

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

## 8.2.1. Editing a Benchmark

- i) Select a survey from the Survey list.
- ii) Click the '**More Options**' <sup>‡</sup> icon provided next to a survey name.
- iii) Select the 'Benchmark' option from the menu list.



- iv) The 'Edit Benchmark' page opens.
- v) A new Benchmark gets created and it gets the name from the survey title.
   E.g., Mobile Trend Survey gets a benchmark entitled 'Benchmark for Mobile Trend Survey' by default.
- vi) Users can edit the below mentioned fields (if desired). Such as:
  - Benchmark Title
  - Benchmark Mission



Benchmark Vision

#### vii) Click the 'Save' option.

Benchmark : Benchmark for Mobile	Trend Survey	
Edit Benchmark		
Benchmark Name :	Benchmark for Mobile Trend Survey	
	17 characters remaining.	
Benchmark Mission :	Mission	
Benchmark Vision :	Vision	
	Save	

viii) The modified information gets saved. The same gets notified by a message.

Benchmark	
	Benchmark Updated Successfully.

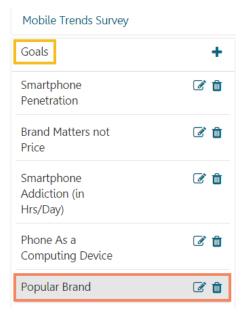
## 8.2.2. Adding Goal to a Benchmark

- i) Navigate to the benchmark page.
- ii) Click the 'Add New Goal' + icon on the left pane of the page.
- iii) The users get 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.

Create Benchmark Goal	
Benchmark Name :	Benchmark for Mobile Trend Survey
Goal Name :	Popular Brand *
	37 characters remaining.
Goal Description :	
Upper Threshold :	27
Lower Threshold :	0
Operation On Goal Question	Average
Values :	
Is High Value True :	True
	Save



A Benchmark goal gets added to the benchmark. vi)



#### Note:

- a. The Benchmark name displays by default.
- b. The fields with the validation symbol  $\star$  are mandatory.
- c. It is advisable to select the 'True' option for the 'Is High-Value True' field.

#### 8.3. **Editing a Benchmark Goal**

- Click the 'Edit' icon provided next to a Benchmark goal name (on the left pane of the page) i) The users get redirected to the 'Edit Benchmark Goal' page (on the right pane of the page) ii)
  - 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

#### iii) Click the 'Update Goal' option.

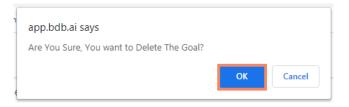
dit Benchmark Goal		+ 🖸 🕫
Benchmark Name :	Benchmark for Mobile Trend Survey	
Goal Name :	Smartphone Penetration	1
	28 characters remaining.	
Goal Description :	Smart Phone Penetration	
		2
Upper Threshold :	100	
Lower Threshold :	0	
Operation On Goal Question	Average	
Values :		
Is High Value True :	True	



iv) The edited goal information will be saved.

## 8.3.1. Deleting a Benchmark Goal

- i) Select the '**Delete**' icon provided next to the benchmark goal name (on the left pane of the page).
- ii) A dialog window appears to confirm the action of 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 the 'Save' option from the 'Create Benchmark Goal' the users get directed to the 'Add Questions for Goal' page.
- ii) The Survey Name, Benchmark name, Goal Name get displayed.
- iii) Select a Question using the drop-down menu.

Add Questions For Goal		+ 🖸 Ø
Survey Name :	Mobile Trends Survey	
Benchmark Name :	Benchmark for Mobile Trend Survey	
Goal Name :	Popular Brand	
Select Question :	Would you switch to Another Brand if it offered similar features at a 20% lower cost?	
	Save	

- iv) The users get redirected to the 'Enter Question Rule Value for Goal' window.
- v) Set value for each answer option.
- vi) Select an '**Operation**' to be performed on the answer options (if asked based on the question type). Three options get listed under the '**Operation**' drop-down menu:
  - Addition
  - Multiplication
  - Average
- vii) Click the '**Done**' option.



Enter Question Rule	Value For Goal	
Question : Would you switch to Another Brand	if it offered similar features at a 20% lc	
Highly Likely :	5	
Likely :	4	
Not Sure :	2	
Will Change @ >40% discount :	3	
Not at All :	1	
Show Help ?		Done

- viii) The users get directed back to the 'Add Questions for Goal' page.
- ix) Click the 'Save' option.

Add Questions For Goal		+ 🖸 🛷
Survey Name :	Mobile Trends Survey	
Benchmark Name :	Benchmark for Mobile Trend Survey	
Goal Name :	Popular Brand	
Select Question :	Would you switch to Another Brand if it offered similar features at a 20% lower cost?	
	Save	

x) The selected question gets added to the Benchmark Goal. A message appears to assure the same.

Add Questions For Goal	+ 🖸 🕫
Que	tion Saved Successfully

#### Note:

- a. The 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 the 'View Goal Question' 🙆 icon.
- iii) A list view of all the added questions will be displayed as per:
  - Associated Questions
    - Question Type
    - Calculated Value
    - Actions



View Questions			+ 🙆 🍫
Show 10 • entries		Search:	
Associated Questions	Question Type	Calculated Value 🗘	Actions 🖨
Would you switch to Another Brand if it offered similar features at a 20% lower cost?	Single Answer	3.13	Ø 📋
Showing 1 to 1 of 1 entries		Previous	1 Next

**Note:** Click the **'Edit Question'** icon provided under the **'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 the 'Delete' <sup>III</sup> icon provided under 'Actions'.
- iii) A dialog window appears to confirm the deletion.
- iv) Click the 'OK' option.

n	app.bdb.ai says	
	Are You Sure, You Want To Delete The Question ?	
n	OK Cancel	

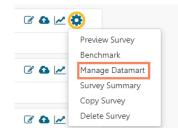
v) The selected question gets removed from the benchmark goal.

## 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 list.
- ii) Click the '**More Options**' button 🍄 provided next to a survey name.
- iii) Select the 'Manage Datamart' option from the context menu.



- iv) A new screen gets launched to create/ update Datamart.
- v) 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 the 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. Username: Provide the username.



- g. **Password:** Provide a password.
- h. Datamart Description: Enter a description of the Datamart (It is an optional field).
- vi) Click the **'Create/ Update Datamart**' option to create a Datamart.

OR

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

Create	Datamart for Survey: Mobile Trends Survey	
Datamart Status :	There Was an Issue In Datamart Creation. Issue is: undefined	
Database Type :	My SQL	*
Database Name :		*
URL :		*
Port :		*
User Name :		*
Password :		*
Datamart Description :	Enter Datamart Description	
		li
	Create Datamart Reset	
	hanges in Datamart detail may cause to recreate Datamart at given ip address.	
** To up	date new record in datamart use "Update Record" button.	
** To get	t the latest status of datamart use refresh button of right top corner.	

- vii) The users get directed to a new page (if a Datamart is created successfully) and the '**Datamart Status**' gets displayed on that page to confirm the successful creation of a Datamart.
- viii) Click the '**Refresh**'<sup>\$\sigma\$</sup> icon.

tamart Status : Vour Last Datamart Was Created Successfully.	
Last Updated : 2020-05-08 12:07:07	
atabase Type : My SQL	*
tabase Name : nidhidatamarttest	*
URL: 52.37.196.28	*
Port : 3306	*
User Name : bi_admin	*
Password :	*
t Description : Enter Datamart Description	

ix) The created Datamart gets displayed on the page.

Manage Datamart of Your Survey	
nidhidatamarttest	0 🕥 t



x) Click the Datamart name to open the Datamart details.

Manage Datamart of Your Survey			
nidhidatamarttest	1 🐼 💿 🕤	Datamart Details of Survey: Mobile Trends Survey	
		Database Name :	nidhidatamarttest
		URL :	52.37.196.28
		Port :	3306
		Update Status :	Manually
		Last Updated :	2020-05-08 12:07:

## 8.4.2. Implementing Scheduler in the DataMart Section

- i) Navigate to the Manage Datamart of Your Survey page.
- ii) The DataMart details will be displayed.
- iii) Click the '**Update Settings**' 🕑 icon.

anage Datamart of Your Survey			
nidhidatamarttest	<mark>0</mark> 2 t	Datamart Details of Survey: Mobile Trends Survey	
		Database Name :	nidhidatamarttest
		URL :	52.37.196.28
		Port :	3306
		Update Status :	Manually
		Last Updated :	2020-05-08 12:07

- iv) The 'Scheduler View' window opens.
- v) Click the 'Create Scheduler' option.

Scheduler View	
Create Scheduler for this Datamart	
Create Scheduler	l

- vi) The users get directed to a new screen.
- vii) 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
- viii) Click the 'Save' option.



Scheduler View							
Hourly	Daily		We	ekly	Mon	thly	Yearly
Start date		05/14	4/2020 7:3	9 PM			
Every		1		hou	r(s)		
At		12	Ŧ	00	•	ho	ur(s)
End date		05/1	5/2020 7:3	9 PM			
			save				

ix) A success message appears and the scheduler is created successfully, the screen will display the 'Edit Scheduler' and 'Stop Scheduler' options.

	Scheduler is Created Successfully	
Scheduler View		
Hourly	Daily Weekly Monthly Yearly	
Start date	05/14/2020 7:39 PM	
Every	1 hour(s)	
At	12 • 00 • hour(s)	
End date	05/15/2020 7:39 PM	
	Edit Scheduler Stop Scheduler	

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

Scheduler View				
Hourly	ily	Weekly	Monthly	Yearly
Start date	05/14/202	0 7:39 PM		
Every	1	hour	(s)	
At	12	• 00	Ŧ	hour(s)
End date	05/15/202	0 7:39 PM		
	Update Sc	heduler Sto	p Scheduler	

- The scheduler information gets updated successfully.
- Stopping a Scheduler:
  - Click the 'Stop Scheduler' option.



#### • The scheduler gets stopped.

Scheduler View						
Hourly	Daily	Weekly		Monthly	Y	early
Start date	05/	/14/2020 7:39 PN	1			
Every	1		hour(s)			
At	03	T	00	•	hour(s)	
End date	05/	/15/2020 7:39 PN	1			
	Up	date Scheduler	Stop Sch	eduler		

- A message appears to notify that the scheduler is stopped.
- Click the 'Restart Scheduler' to resume the scheduler.

	Scheduler for this Datamart is Stopped Successfully
cheduler View	
Hourly	Daily Weekly Monthly Yearly
Start date	05/14/2020 7:39 PM
Every	1 hour(s)
<ul> <li>At</li> </ul>	03 • 00 • hour(s)
End date	05/15/2020 7:39 PM
	Update Scheduler Restart Scheduler

 $\circ$   $\;$  A message appears to notify that the scheduler is restarted.

Scheduler is Restarted Successfully

## 8.4.3. Other Options

- i. Update Now:
  - **1.** Click 'Update Now' <sup>1</sup> icon on the 'Manage DataMart for Your Survey' screen.
  - 2. A window will be displayed, allowing the user to update the scheduler manually.
  - **3.** Click the '**Update Now**' option.



Manage Datamart of Your Survey						
nidhidatamarttest	0 51	Update Manually here				
		Last Updated : 2020-05-08 12:07:07				
		Update Now				

**4.** The scheduler gets updated.

#### ii. Edit DataMart:

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

- **1.** Click the 'Edit DataMart' <sup>C</sup> icon.
- 2. DataMart details for the selected survey will be displayed
- 3. Click the 'Edit DataMart Detail' option.

View Data	mart Details for Survey: Mobile Trends Survey	C
Datamart Status :	Your Last Datamart Was Created Successfully.	
Last Updated :	2020-05-08 12:07:07	
Database Type :	My SQL *	
Database Name :	nidhidatamarttest *	
URL :	\$2.37.196.28	
Port :	3306 *	
User Name :	bi_admin *	
Password :	*	
Datamart Description :	Enter Datamart Description	
	Edit Datamart Detail Update Record	
** Any Cl	hanges in Datamart detail may cause to recreate Datamart at given ip address.	
** To upo	date new record in datamart use "Update Record" button.	
** To get	the latest status of datamart use refresh button of right top corner.	

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

opuate	Datamart for Survey: Mobile Trends Survey		S
Datamart Status :	Your Last Datamart Was Created Successfully.		
Last Updated :	2020-05-08 12:07:07		
Database Type :	My SQL	*	
Database Name :	niðhidatamarttest	*	
URL :	52.37.196.28	*	
Port :	3306	*	
User Name :	bi_admin	*	
Password :		*	
Datamart Description :	Enter Datamart Description		
	Update Datamart Reset		

6. The DataMart details get 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 the '**Update Record**' button.
- c. To get the latest status of DataMart, use the '**Refresh**' button

## 8.5. Copying a Survey

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

- i) Navigate to the Survey home page.
- ii) Click the 'More Options' 🍄 icon.
- iii) Select the '**Copy Survey**' option from the menu.

\$	
Pre	view Survey
Ben	ichmark
Mai	nage Datamart
Sur	vey Summary
Cop	by Survey
Del	ete Survey

iv) A message appears to notify that the selected survey has been copied successfully.

Survey Copied Successfully.



- v) A new survey gets added to the survey list.
- vi) The name of the copied survey gets displayed as 'Copy\_of\_name of the original Survey,' E.g., a copy of the Mobile Trends Survey gets renamed as 'Copy\_of\_Mobile Trends Survey'.



#### Note:

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

### 8.6. Survey Summary

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

BBB®					≡		
Mobile Trends Survey					≡		
DESIGN SUMMARY	RESPONSE SUMMARY						
	Total Responses		Overall Survey Status				
Mobile Trends Survey Created On : 04/12/2016	37		OPEN				
Questions : 12, Pages : 4	Collectors						
Design Preview	Name Mobile Trends Survey	Responses 37	Created On 04/12/2016	Status OPEN			
	[	Analyze Result					

### 8.7. Deleting a Survey

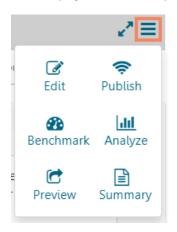
- i) Navigate to the survey home page.
- ii) Click the '**More Options**' <sup>‡</sup> icon provided next to a Survey Name.
- iii) A drop-down menu will be displayed.
- iv) Select the 'Delete Survey' option from the drop-down menu.
- v) A new window will pop-up to confirm the deletion.
- vi) Click the '**OK**' option.

app.bdb.ai says		
Are You Sure, You Want To Delete The Survey	?	
	ОК	Cancel

vii) The selected survey gets deleted.



Note: The users can also get the various options to deal with a Survey under the 'More Options' icon provided on each page of the Survey.

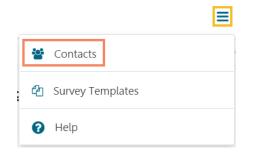


# 9. Contacts

The Contacts section helps to create various contact groups and add recipients to maintain an address book for sharing a survey.

## 9.1. Creating a Contact Group

- i) Click the menu  $\equiv$  icon on the top right corner.
- ii) A context menu opens.
- iii) Select the 'Contacts' option from the context menu.



- iv) The 'Contacts' page opens with the Create New Contact Group.
- v) Enter the 'Group Name' in the given field to create a new contact group.
- vi) Click the 'Create New' option.

BBB®			≡
Contacts			+
Search	Create New Contact Group Group Name :	Survey Contacts   34 characters remaining. Create New	*

- vii) A new contact group gets created and added on the left side of the screen pane.
- viii) A message appears to inform the same.



- ix) The user gets two ways to create Contact
  - a. Upload Contacts from CSV
  - b. Create New Contacts (manually create contacts)

Contacts	+
Search	Contact Group Created Successfully
Survey Contacts 0 🔅	Now Create Contacts Using : Upload Contacts From CSV OR Create New Contacts

**Note:** Click the 'Add Contact Group' 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 the '**Create New Contacts**' option that has been displayed by default after creating a contact group.

Or

Select the '**Create New Contacts**' option from the More Options <sup>\*</sup> context menu provided next to the

Contact Name.

BBB®	≡
Contacts	4
Search Survey Contacts 0 Edit Contact Group List Contacts	Now Create Contacts Using : Upload Contacts From CSV OR Create New Contacts
Create New Contacts Upload Contacts From CSV Delete Contact Group	

- ii) The user gets redirected on the 'Create Contacts' panel.
- iii) Enter the following information manually:
  - First Name
  - Last Name
  - Email
  - Mobile No.
- iv) Click the 'Create' option.

Contacts						
Search	Create Contacts					
Survey Contacts	 If Any Contact Alre	eady Exist, Duplicate Should Be :		Ignore	•	
0	\$ First Name	Last Name	Email		Mobile No.	Add
	Michael	Brown	mike.b	rown@xyz.com	4422123232	
						Create



- v) The manually added contact gets created and added to the Contacts List.
- vi) A message appears to display the same.

Contacts											+
Search						Contacts Created Successfull	у				
Survey Contacts		Survey Contact	s : Co	ntacts List							
1	٥	Show 10 •	entrie	!S				Search:			
		First Name	•	Last Name	¢	EmailId	¢	Mobile No.	¢	Action	÷
		Michael		Brown		mike.brown@xyz.com		4422123232		Û	ľ
	Showing 1 to 1 of	1 entr	ies					Previous	1	Next	

Note: Click the 'Add' option to add multiple contacts.

Contacts						+
Search	Create Contacts					
Survey Contacts	If Any Contact Alre	ady Exist, Duplicate Should Be :		Ignore	¥	
1 🗘	First Name	Last Name	Email		Mobile No.	Add
	William	Black	willb@	xyz.com	1142323232	
					1142525252	

## 9.2.2. Uploading Contacts from CSV File

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

OR

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

Contacts	=
Search Survey Contacts 0	Now Create Contacts Using : Upload Contacts From CSV
Edit Contact Group List Contacts Create New Contacts Upload Contacts From CSV Delete Contact Group	Create New Contacts

- ii) The user gets redirected on the 'Create Contacts' panel.
- iii) Click the 'Browse File' option.

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

www.bdb.ai



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

If Any Contact Alrea	dy Exist, Duplicate Should B			
Select CSV.	Browse File	Need Help?		
Show 10 • entrie	es		Search:	
First Name	▲ Last Name	🕈 Emailld	Mobile No.	¢ 🗆
First Name	Last Name	Email	Telephone No.	
lohn	Dep	jdp@xyz.com	1-143-432-323	~
Michel	Luqua	mic.luc@abc.com	1-561-232-322	<b>~</b>
Nobita	Mitsuba	nobim@pqr.com	1-145-234-098	<b>~</b>
Showing 1 to 4 of 4 entr	ries		Previous	1 Next
				Submi

- viii) The selected contacts get uploaded to the contact list.
- ix) A message appears to inform the same.

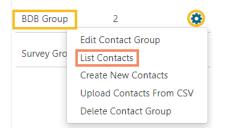
BBB@								
Contacts								
Search					Contacts Created Successfully			
Test Group	0	٥	Survey Group : Contacts	List				
BDB Course	2	0	Show 10 • entries			Search:		
BDB Group	2		First Name 🔺	Last Name	♦ EmailId ♦	Mobile No.	🔶 Acti	on
Survey Group	3	٠	John	Dep	jdp@xyz.com	1-143-432-323		<u>i</u>
			Michel	Luqua	mic.luc@abc.com	1-561-232-322		â G
			Nobita	Mitsuba	nobim@pqr.com	1-145-234-098		â C
			Showing 1 to 3 of 3 entries			F	Previous	1 Ne

Note: The 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 '**More Options**' 🍄 icon on the contacts page.
- ii) A context menu opens.
- iii) Select the 'List Contacts' option.





iv) The existing contacts get listed with the added contact details for the contacts.

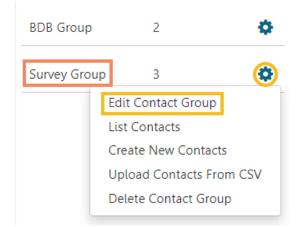
Contacts									- 1
Search			BDB Group : Contacts	List					
Test Group	0	•	Show 10 • entries			Search:			
BDB Group	2	•	First Name	Last Name	🗧 Emailld	🔷 Mobile No.	¢	Action	(
Current Contra	2	*	Rajat	Gupta	rajat.gupta@bdb.ai	1234567890		Û	ľ
Survey Group	3	•	Vivek	Kumar	vivek.kumar@bdb.ai	8019432563		Û	Ø
			Showing 1 to 2 of 2 entries	5			Previo	us 1	Next

#### Note:

- a. Click the '**Delete**' icon to remove a contact from the contact list.
- b. Click the '**Edit**' icon is to edit the contact details for the selected contact.

## 9.4. Editing a Contact Group

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



- iv) The users get redirected to edit the contact group details.
- v) Edit the 'Group Name'.
- vi) Click the '**Edit**' option.



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

vii) The desired information in the contact group gets edited.

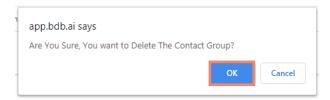


# 9.5. Deleting a Contact Group

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

BDB Group	2	\$
Survey Group	3	٢
	Edit Contact Group	
	List Contacts	
	Create New Contacts	
	Upload Contacts From	n CSV
	Delete Contact Group	

- iv) A dialog window option to confirm the deletion.
- v) Click the '**OK**' option.



vi) The selected contact group gets deleted.

# **10.** Survey Template

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

- i) Click the menu  $\equiv$  icon on the top right corner.
- ii) A context menu opens.
- iii) Select the 'Survey Templates' option.



***	Contacts
ඵ	Survey Templates
0	Help

#### iv) The 'Survey Templates' page opens.

Dduct Customer Satisfaction Survey template is effective for any company looking to gain insight on how their bu ugh this survey can be used to better meet customer needs and identify comp	isiness is perceived by its custome	w Use This Template
		rs. The data gained
s:1 , Question:10		
stomer Service Survey	Previe	W Use This Template
	relationship between their staff ar	nd customers, as well a
ind	Lustomer service surveys are vital for any company looking to gain insight on the understanding their staff's strengths and weaknesses. lages: 2 , Question: 15	

#### v) Click the '**Preview**' option.

Customer Satisfaction : Template List
Product Customer Satisfaction Survey
This template is effective for any company looking to gain insight on how their business is perceived by its customers. The data gained

This template is effective for any company looking to gain insight on how their business is perceived by its customers. The data gained through this survey can be used to better meet customer needs and identify company strengths and weaknesses. Pages : 1 , Question : 10

#### vi) The preview of the selected Survey Template opens.

Product Customer Satisfaction Survey						
stomer Page						
Overall, I am very satisfied with the way of the company performed on this product.	Disagree OStrongly [	licagroo				
		lsagree				
Please indicate your level of agreement with each of the following statements:	Strongly Agree	Agree	Disagree	Strongly Disagree		
		5	Disagree	Strongly Disagree		
Please indicate your level of agreement with each of the following statements:		5	Disagree	Strongly Disagree		
Please indicate your level of agreement with each of the following statements: Company service representatives are well trained		Agree	Disagree	Strongly Disagree		
Please indicate your level of agreement with each of the following statements: Company service representatives are well trained Company service representatives are well supervised		Agree	Disagree	Strongly Disagree		

vii) Click the 'Use This Template' option.



Customer Satisfaction : Template List	
Product Customer Satisfaction Survey	

Preview Use This Template

This template is effective for any company looking to gain insight on how their business is perceived by its customers. The data gained through this survey can be used to better meet customer needs and identify company strengths and weaknesses. Pages : 1 , Question : 10

viii) To create/modify a survey based on the selected survey template in the current user account.

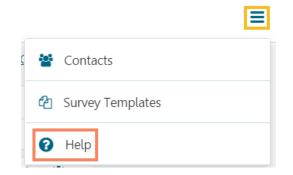
<b>BBBO</b>	=
Questions Page Survey Properties Theme	Save All Pages
Single Answer	+ Insert Page
✓ Multiple Answer	Product Customer Satisfaction Survey
Single Answer Picture	Page 1: Customer Page
Multiple Answer Picture	Overall, I am very satisfied with the way of the company performed on this product.
Yes/No	Strongly Agree Agree Nor Disagree Disagree
Matrix-Single Answer	O Strongly Disagree
Matrix-Multiple Answer	
Rating Scale	Please indicate your level of agreement with each of the following statements:
9 Numerical Textbox	Company service representatives are well trained
A Textbox	Company service representatives are well supervised
Textbox	Service representatives adhere to professional OOOO

**Note**: By clicking the '**Use This Template**' option, the users can edit or modify the given questions in the selected Survey Template.

# 11. Help

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

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



iv) The user gets directed to the Survey help document.



About this Guide	
1. Document History	
2. Overview	
3. Target Audience	
Creating a Survey	
Designing a Survey	
<u> 2008 Binne in Ourie</u> j.	
1. Questions	
1.1. Inserting a Survey Question	
1.2. Available Question Types	
2. Properties	
3. Inserting a New Page	
4. Page: Editing an Existing Page	
5. Survey Option	
<u>6. Saving a Survey</u>	
7. Other Icons	

# 12. Signing Out

The users require to go through the following steps to complete the signing off procedure for the BDB Survey.

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

- i) The Survey app opens in a separate window while selecting the '**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 Off from the BDB Platform

The following steps describe how to Sing-off from the BDB Platform.

- i) Click the 'User Profile' icon on the Platform homepage.
- ii) Click the 'Sign Out' option.

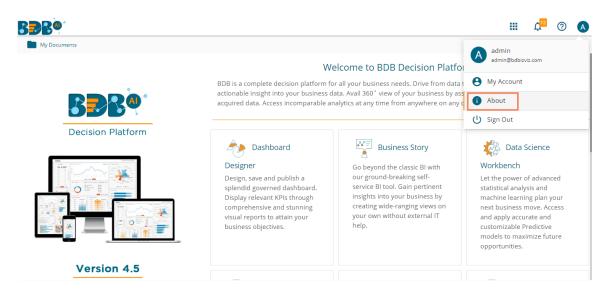
		Ļ <sup>12</sup>	?	A
- <b>A</b>	admin admin@bdbizv	viz.com		
θ	My Account			
0	About			
ር	Sign Out			



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

#### Note:

- a. By clicking the 'Sign Out' option, the user gets back to the Sign-in page of the BDB platform.
- b. Click the 'About' option to open the default homepage for the BDB Platform.



## 12.3. 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 the 'Forgot Password?' option.

Decision Platform
Email * bdbuser@bdb.ai
Password *
Auth Type Enterprise
Forgot Password ?

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- 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.



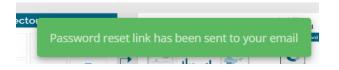
### Forgot Password?

Please enter the registered email address to reset your password.

Email *	
bdbuser@bdb.ai	
	Sign in
Continue	

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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 about the password reset link (The users receive the reset link via their registered email.)



- vii) Click the password reset link from your registered email.
- viii) The user gets 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.



#### **Reset Password**

You have confirmed ownership of the BDB account. Please reset your password to get access.

New Password \*

Confirm New Password \*

Continue

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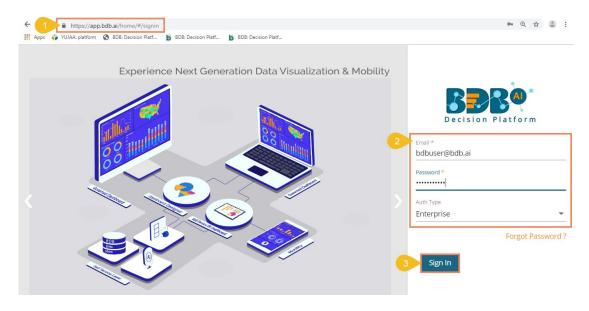
xii) The password for the selected BDB account gets reset, and the user receives a notification to assure them.

New password has been updated successfully

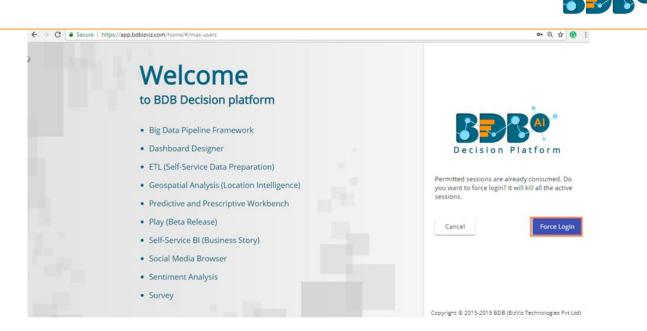
### 12.4. Force Login

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 the 4<sup>th</sup> session a warning message displays to inform that the user has consumed the permitted sessions and a click on the '**Force Login**' would kill all those active sessions.

- i) Navigate to the BDB Platform Login page.
- ii) Enter the valid credentials to log in.
- iii) Click the 'Sign In' 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 gets redirected to the SignIn page of the BDB Platform.
- Note: The user can successfully login to the BDB Platform after selecting the '**Force Login'** option to Sign In to the platform.