

# User Guide

Survey R-5.2.0

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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
Survey 4.6	November 15 <sup>th</sup> , 2019	Updated document
Survey 5.0	February 17 <sup>th</sup> , 2020	Updated document
Survey 5.2.0	August 21 <sup>st</sup> , 2020	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:

<b>Google Chrome</b>	Latest Version (recommended web browser)
<b>Mozilla Firefox/ Firefox ESR</b>	Latest Version
<b>Microsoft Edge</b>	Latest Version
<b>Apple Safari</b>	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.

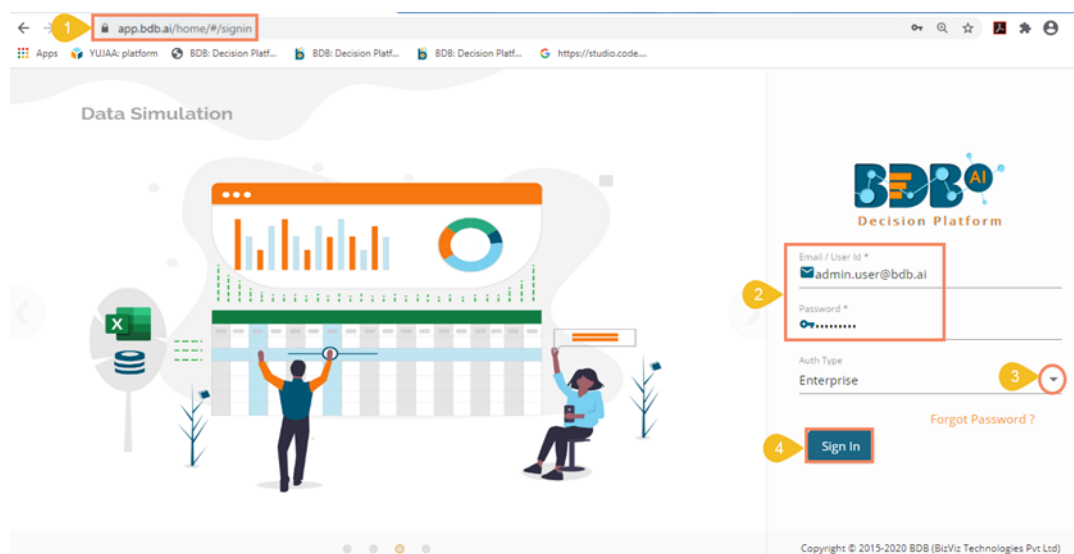
## 3. Getting Started with the BDB Survey

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.

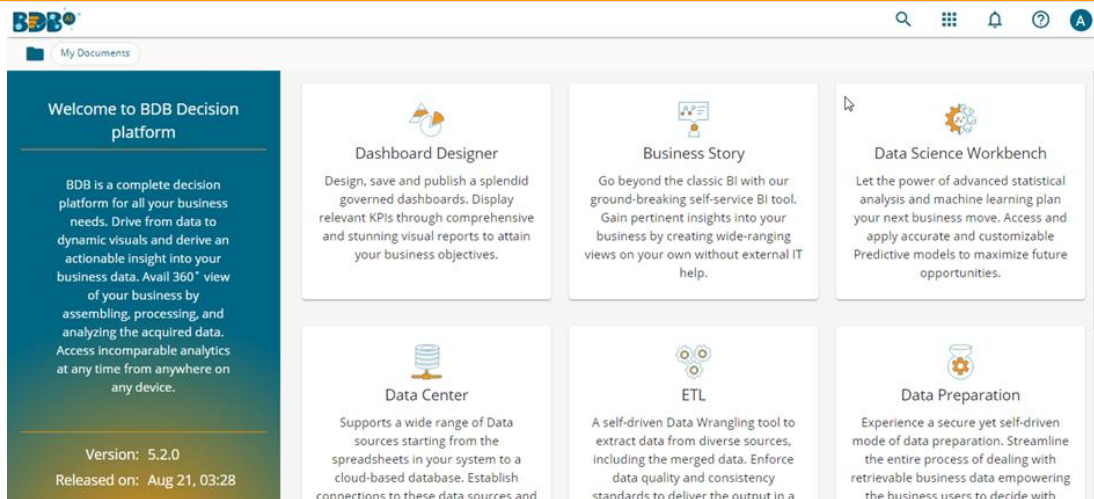
### 3.1. Accessing the Survey Plugin

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.




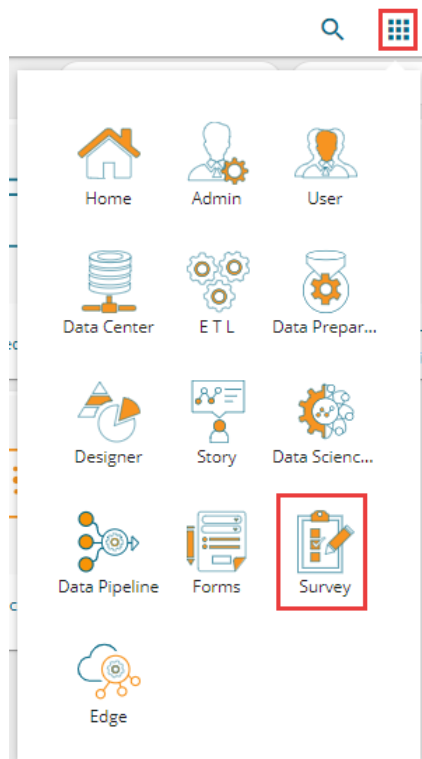
- v) BDB Platform homepage opens.
- vi) The user gets redirected to the BDB Platform homepage.



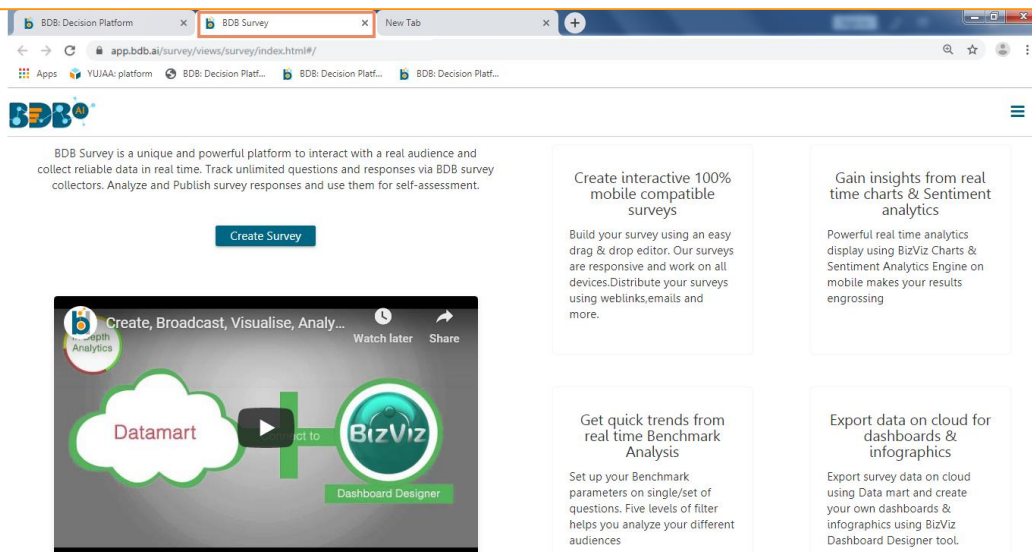
Note:

- 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.



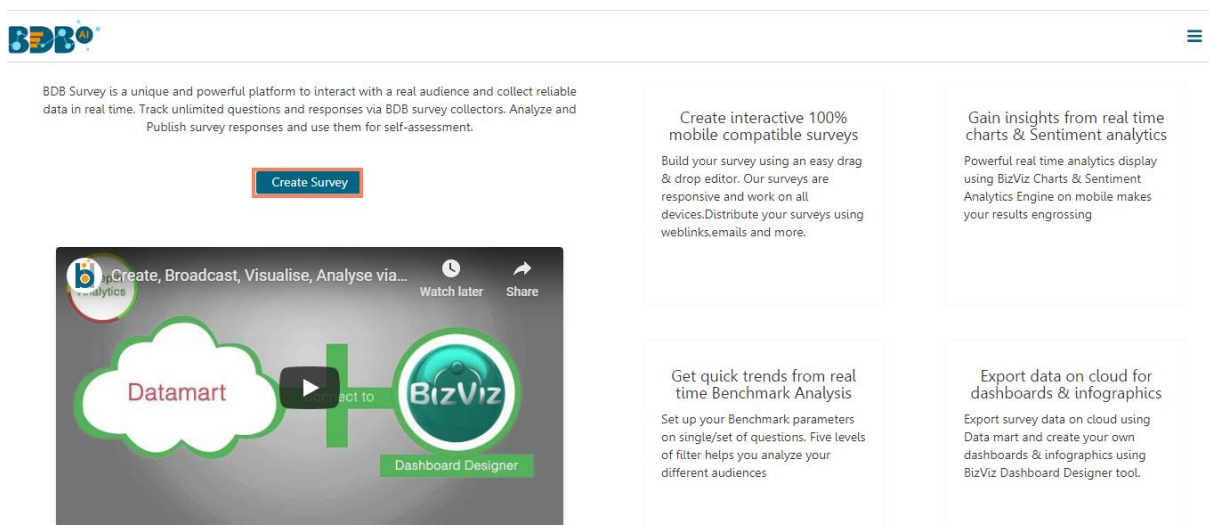
This document aims to describe all the significant Survey components and the related options at details.

## 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.

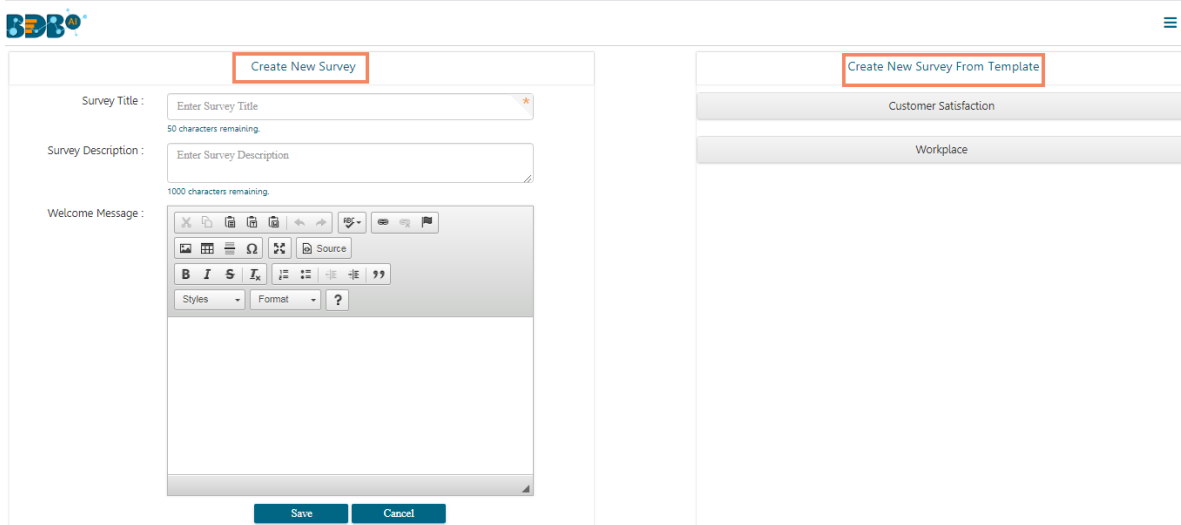
This segment creates, develops, and maintains a questionnaire for a survey. It describes all the supported features and steps to design a survey.

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



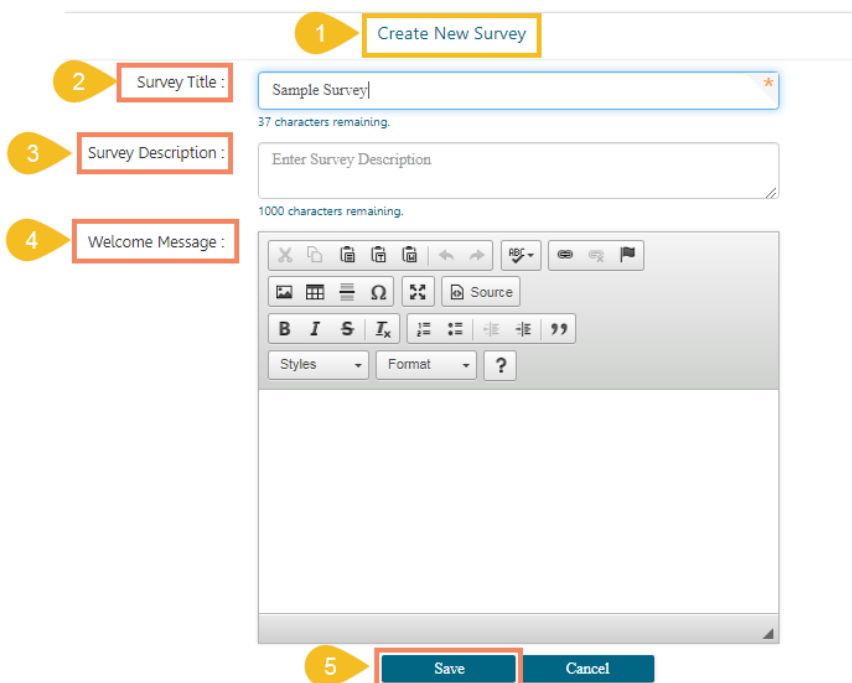
- iii) A new page opens displaying the following options:
  - a. Create New Survey
  - b. Create New Survey from Template



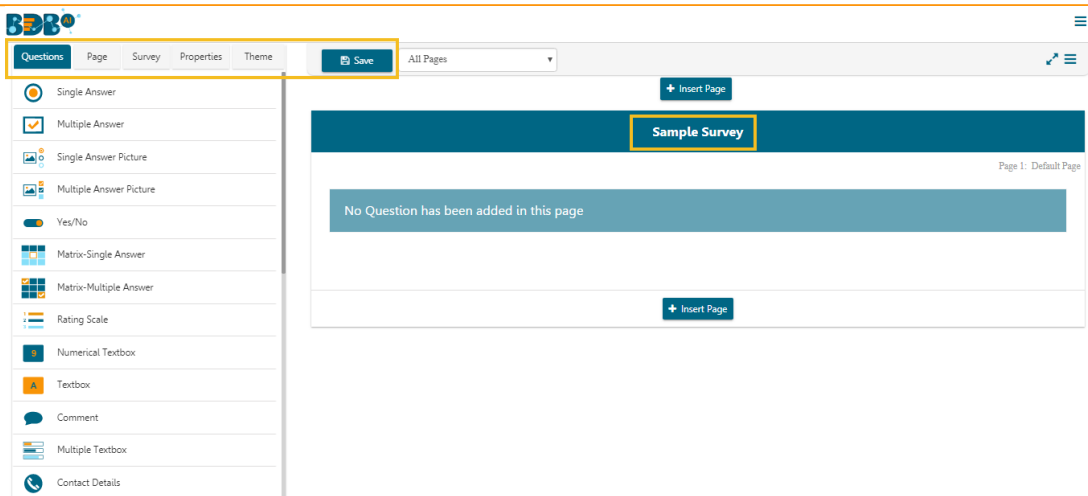


#### 4.1. Creating a New Survey

- 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.

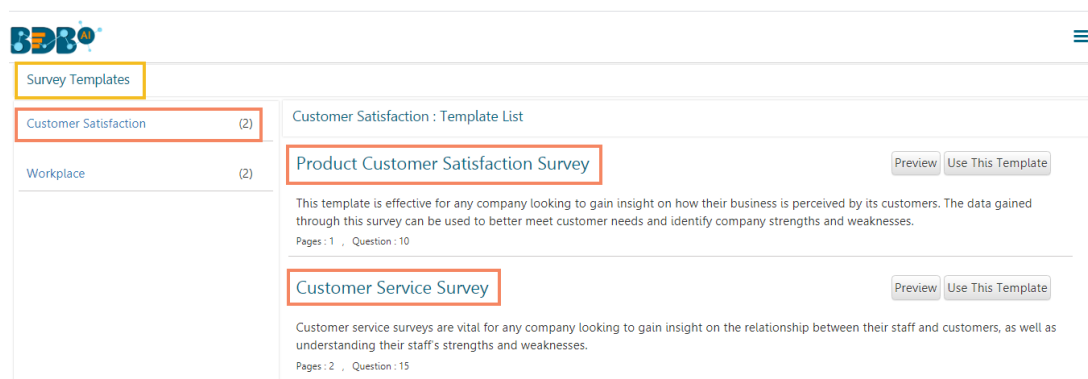


- iv) A new page opens to design a questionnaire for the created Survey.
- v) The page contains a menu row of which the 'Questions' tab opens by default.

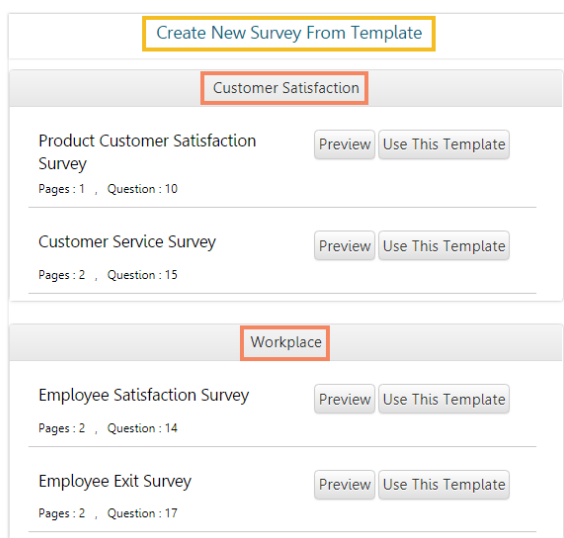


## 4.2. Creating a New Survey using Template

- 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



or



Note:

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

**Product Customer Satisfaction Survey**

Customer Page

Overall, I am very satisfied with the way of the company performed on this product.

Strongly Agree  Agree  Neither Agree Nor Disagree  Disagree  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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Company service representatives are well supervised	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service representatives adhere to professional standards of conduct	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service representatives act in my best interest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, I am satisfied with the service representatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

Questions Page Survey Properties Theme

Save All Pages

+ Insert Page

**Product Customer Satisfaction Survey**

Page 1: Customer Page

Overall, I am very satisfied with the way of the company performed on this product.

Strongly Agree  Agree  Neither Agree Nor Disagree  Disagree  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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Company service representatives are well supervised	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service representatives adhere to professional standards of conduct	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service representatives act in my best interest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, I am satisfied with the service representatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

Questions Page **Survey** Properties Theme

Save All Pages

+ Insert Page

**Product Customer Satisfaction Survey**

Page 1: Customer Page

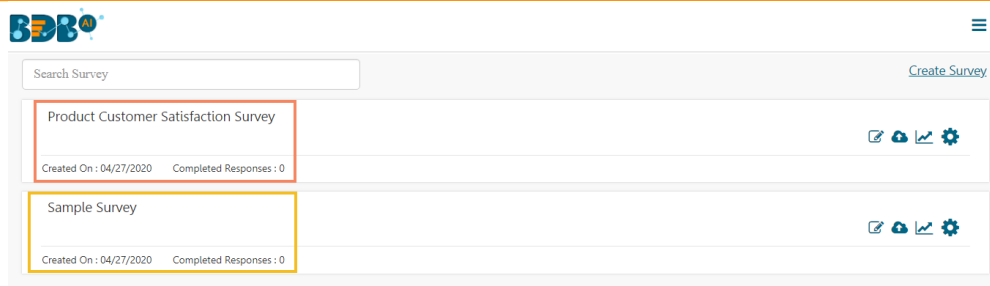
Overall, I am very satisfied with the way of the company performed on this product.

Strongly Agree  Agree  Neither Agree Nor Disagree  Disagree  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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Company service representatives are well supervised	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service representatives adhere to professional standards of conduct	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service representatives act in my best interest	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall, I am satisfied with the service representatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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



- **Other Related Options**

Icons	Name	Description
	Design	Redirects users to design the survey questionnaire
	Publish	Redirects users to publish the survey
	Analyze Result	Redirects users to see various analysis based on the collected survey responses
	More Options	Displays a list of options to be applied to a survey: <ol style="list-style-type: none"> <li>1. Preview Survey</li> <li>2. Benchmark</li> <li>3. Manage Datamart</li> <li>4. Survey Summary</li> <li>5. Copy Survey</li> <li>6. Delete Survey</li> </ol>

## 5. Designing a Survey

The users get various options on the header bar of the survey builder to create and modify a survey.

- Navigate to the survey list.
- Click the 'Design' icon.
- The design page opens with various options to develop the survey questionnaire.
  - Questions
  - Page
  - Survey
  - Properties
  - Save
  - Insert Page
- The 'Question' tab opens by default.

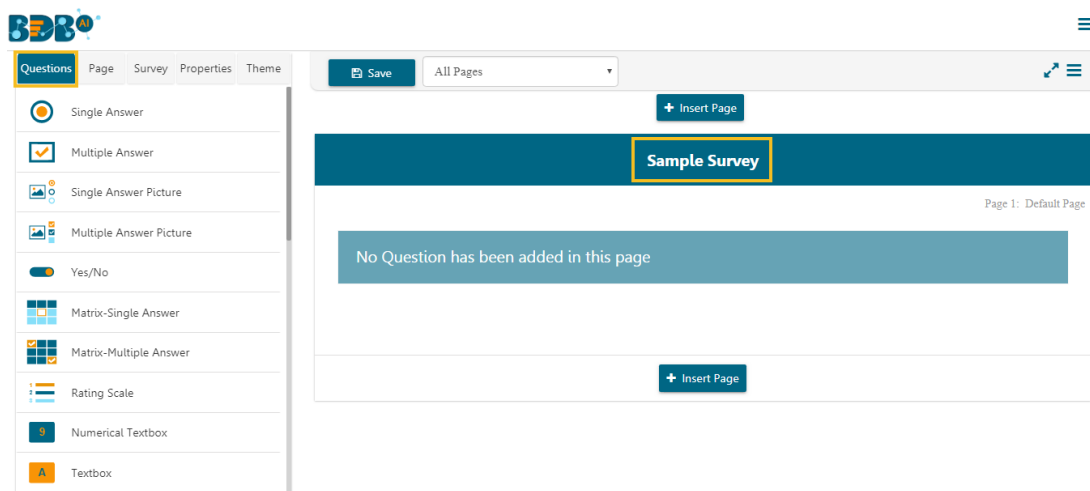


### 5.1. Questions

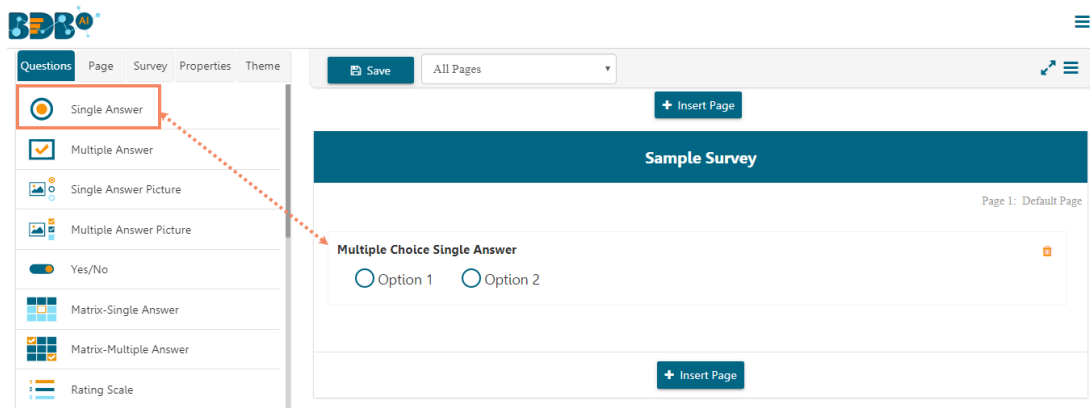
The survey is a carefully created questionnaire. The success of a survey depends upon easy to interpret and goal-oriented questions.

#### Inserting a Survey Question

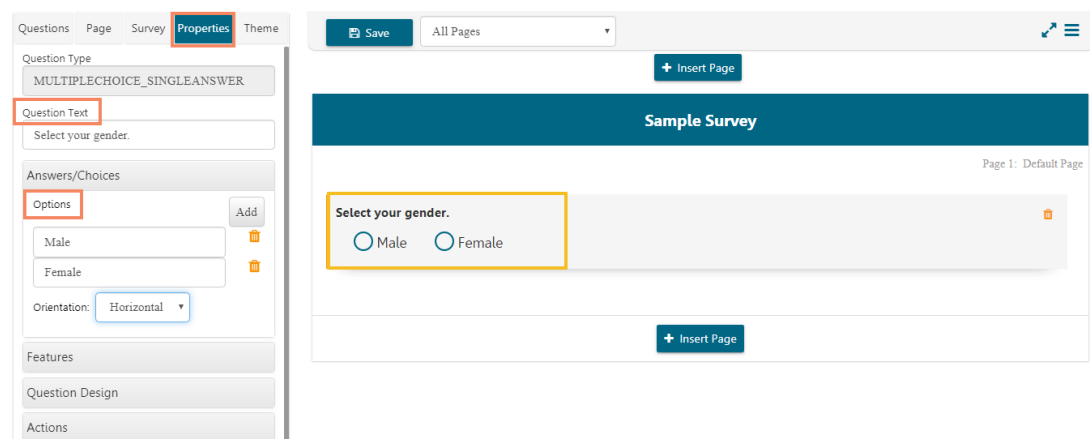
- i) Navigate to the menu row.
- ii) The **'Questions'** tab opens by default.
- iii) Various question-types get displayed on the left pane of the page.
- iv) Page 1 opens as the Default Page.



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



### 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 using your current cell phone? 

Less than 1 year  
  1-2 years  
  3-4 years  
  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. 


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.

Select your favourite mobile device brand. 

Apple	Samsung	Xiaomi
		
<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

Select the mobile device brands owned by your family members. 

Apple	Samsung	Xiaomi
		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- **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 smart phone user? ★

Yes  No

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

Select favourite mobile device brand for each of your family member.

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

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

Please select the options that apply to you.

	Talking	Watsapp	Social Media	Internet	SMS	Games
I use my phone for	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
My 3 most used applications are (select any 3 options)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I need to upgrade my plan to use more for	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I use my phone in the office	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

How the following factors influence your mobile device purchase?

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

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

Howmany mobiles are owned by your family? ★

Answer Here

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

Please enter 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.

Please give feedback of your current mobile brand. ★

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

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

Company

Address

City / Town

ZIP / Postal Code

Country

Email Address

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. ★**

--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: ★**

Best UI

Worst UI

- **Multiple Dropdown-Different Option:** Use 'Multiple Dropdown-Different 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 mobile device brands for each family members. ★

	Apple	Samsung	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 Television and Mobile Brands.

	Television	Mobile
User 1	--Select Option-- ▾	--Select Option-- ▾
User 2	--Select Option-- ▾	--Select Option-- ▾
User 3	--Select Option-- ▾	--Select Option-- ▾

**Note:**

- 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  
DROPDOWN

Question Text  
Select your favourite mobile device brand from the

Answers/Choices

-Mobile Brands-

Note: Blank means no head value and hence in attempt or preview by default first selected option will be blank.

Options

Add

Apple

Samsung

Huawei

Xiaomi

- 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-- ▾
Samsung	--Select Rank-- ▾
Xiaomi	--Select Rank-- ▾

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

How likely is it that you would recommend our company to a friend or colleague?

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 quality of Apple Mobile.

0 [Slider] 100

Selected Value: 87

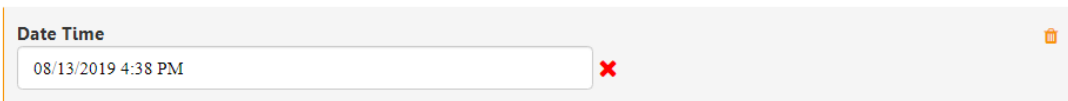
- **Digital Signature:** Use this option when you want respondents to give their digital signature. Respondents can provide a digital signature through cursor by holding the left click. The respondent can use the left click of the cursor to provide a digital signature in the given space.

Signature

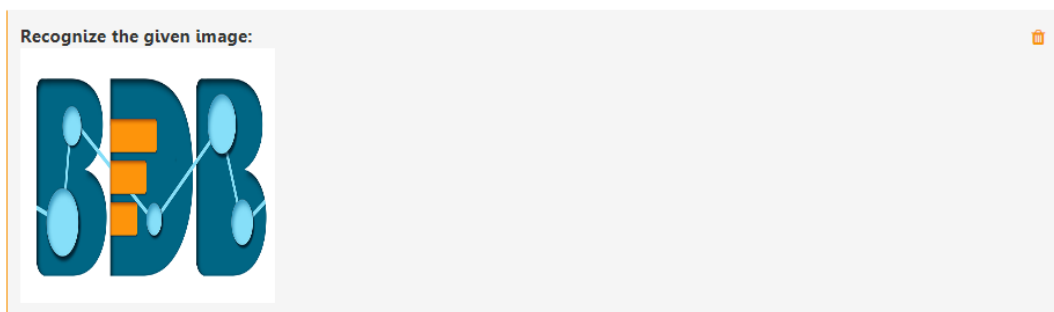
- **File Upload:** Use this option when you want respondents to upload a file. It supports PDF, document, Spread-Sheet, and Image to be uploaded. The file size should not exceed 500 KB. The user can upload the file from the preview page or attempt page.



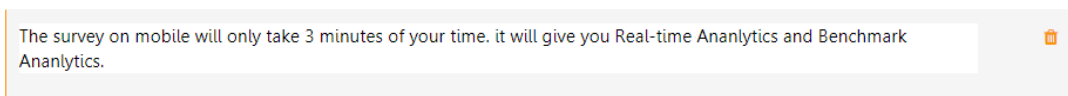
- **Date/ Time:** Use this option when you want respondents to provide date and time. The user can access this feature from the survey designer page, preview screen, and attempt page. By clicking on the space given for date and time, the user will get a calendar to provide a date. Time will be taken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




- **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.



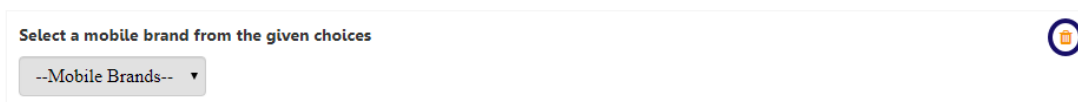
- **Descriptive:** Use this question type when you want to show a brief description of different sections at any place in the survey. It supports smiles and HTML in the body.



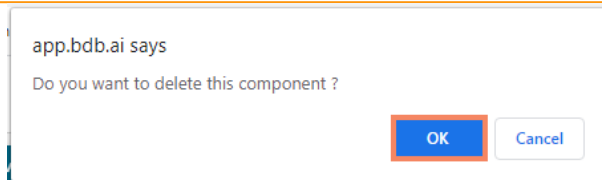
### 5.1.1. Deleting a Question

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

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



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



- vi) The selected question gets deleted from the survey.

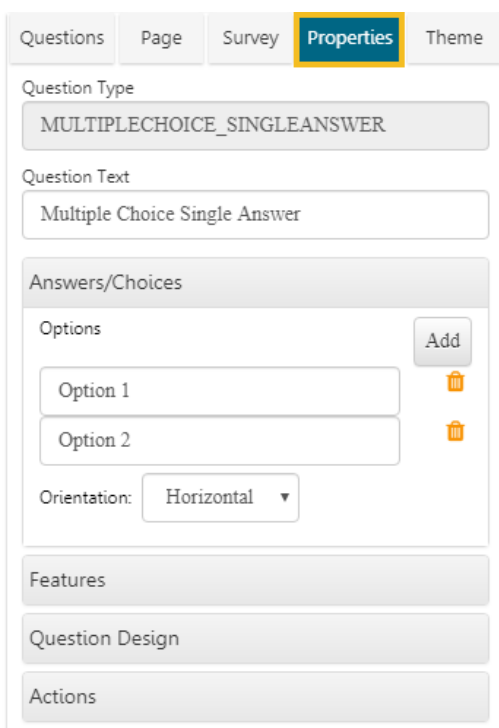
## 5.2. Properties

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:



- 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

Validation Msg

One Option is Required.

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

**Select Your Gender** ★ 🗑️

Male  Female

**Select your Highest Qualification** ★ 🗑️

Graduation  Post Graduation

- **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) :

Text Limit (max:1000) :

Text Limit Message :

Comment Head :

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

**Select Your Gender** ★ 🗑️

Male  Female

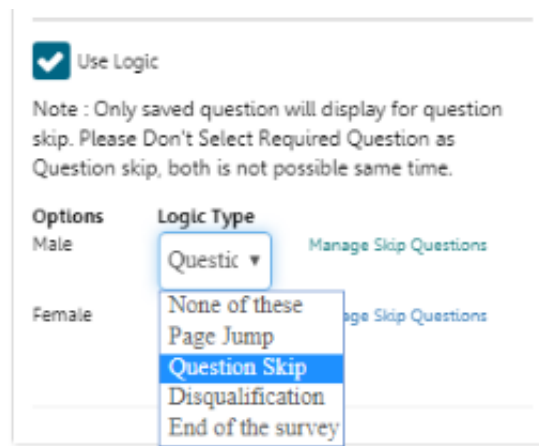
**Comment :**

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.

- Click '**Features**' provided on the left side of the '**Properties**' screen.
- Select the '**Use Logic**' option by check-marking the box.
- '**Options**' and '**Logic Type**' will be displayed.
- Select a logic from the drop-down menu.
- Selecting a logic will display the '**Select**' drop-down menu.
- Select '**Check All**' option from the '**Select**' drop-down menu.
- The selected logic will be applied to the desired option.




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.

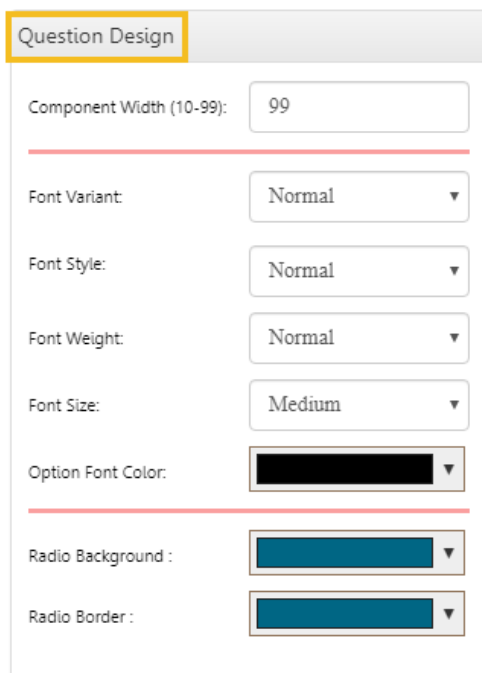
**Note:**

- By selecting the '**None of these**' option, no logic gets applied to the question.
- 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.

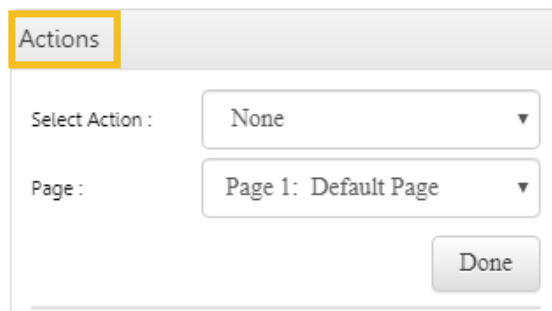
2. **Question Design:** Use the below-listed properties to set question display:

- Component Width:** Set the required width number using the '**Stepper**' button 
- Font Variant:** Select an option from the drop-down menu
  - 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



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.



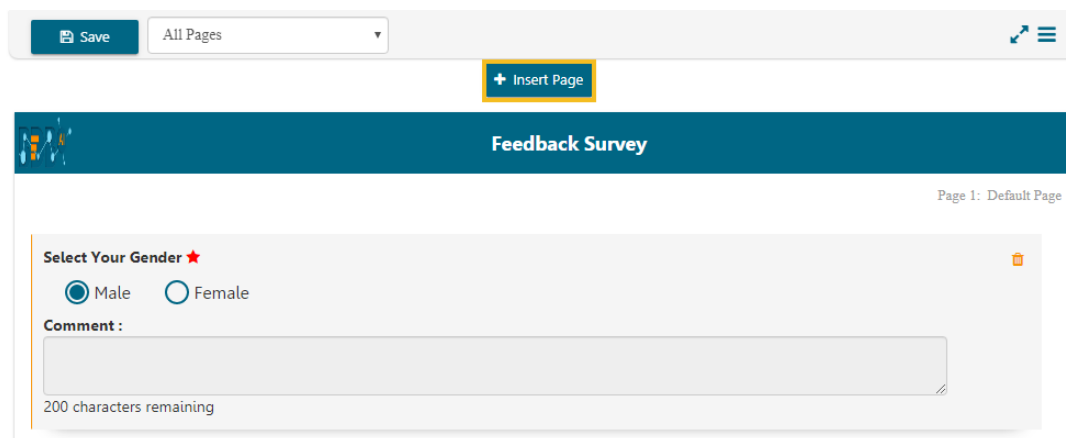


### 5.3. Inserting a New Page

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

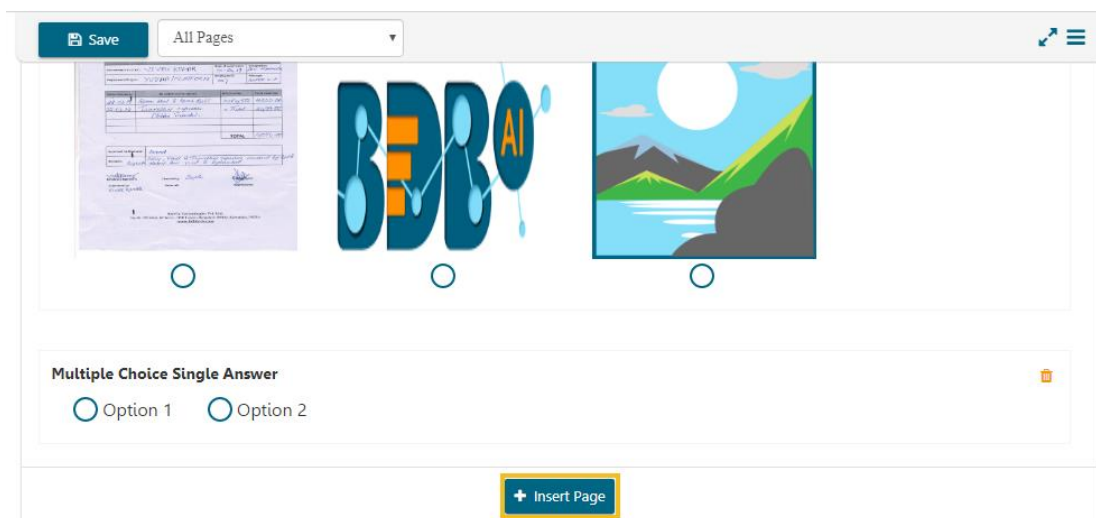
#### 1. Insert Page Option at the top of the screen

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




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

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

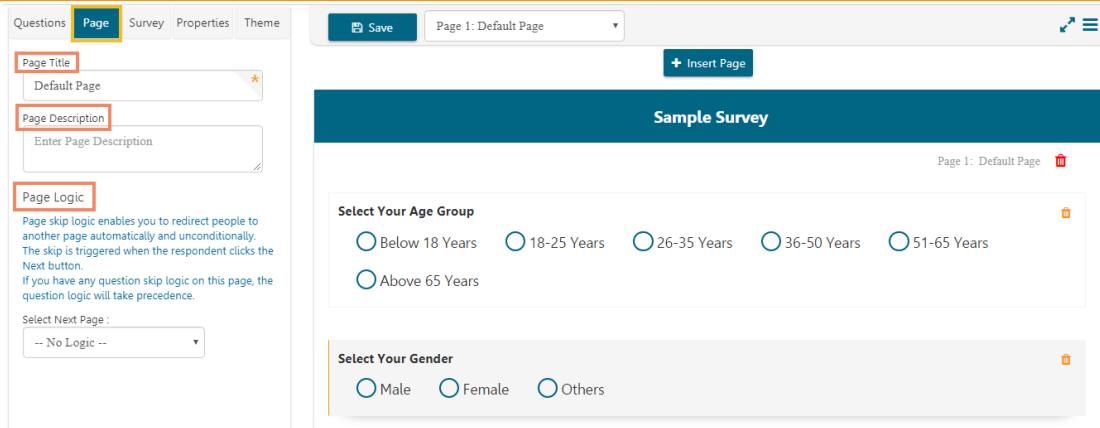


#### Note:

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

### 5.4. Page: Editing an Existing Page

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

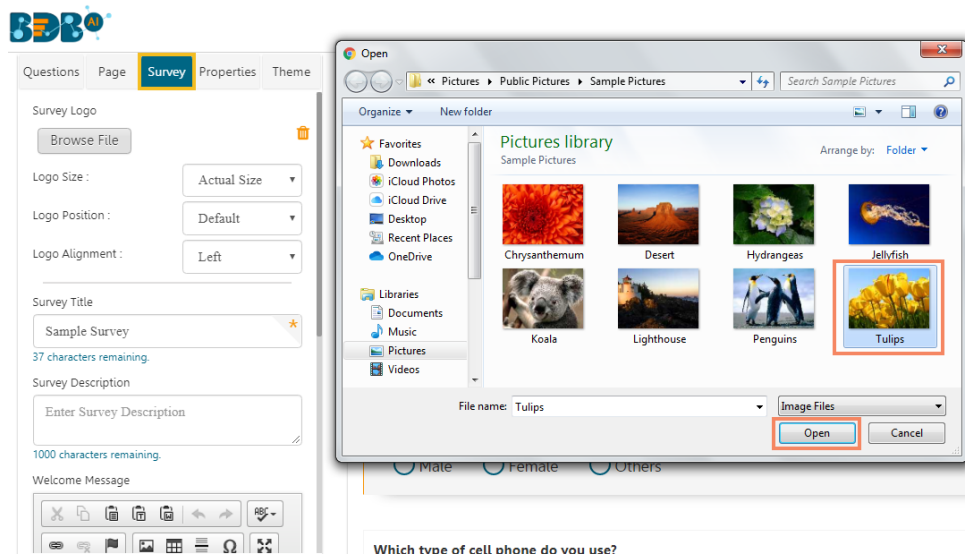


## 5.5. Survey Option

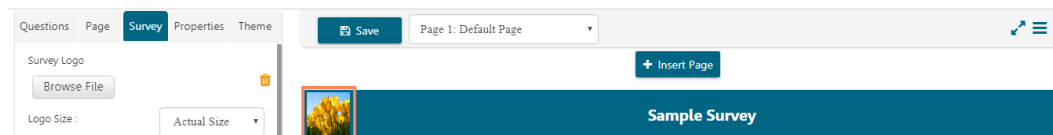
The survey option enables the user to insert a Survey Logo and edit/modify the 'Create Survey' screen.


### 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



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

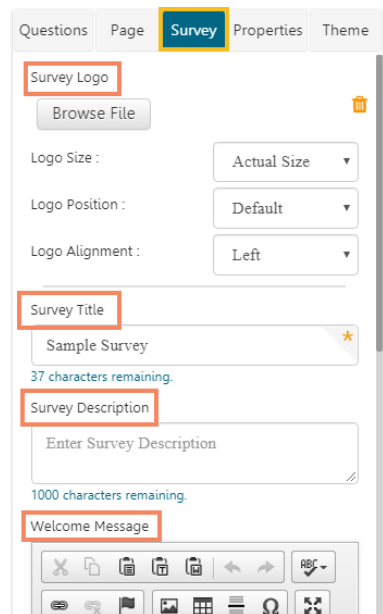


- vii) Click on the 'Delete' option  provided next to the 'Choose File' option to remove the Survey Logo.

**Note:** 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.

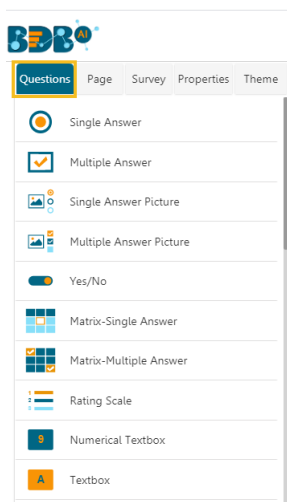


## 5.6. Saving a Survey

- 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.





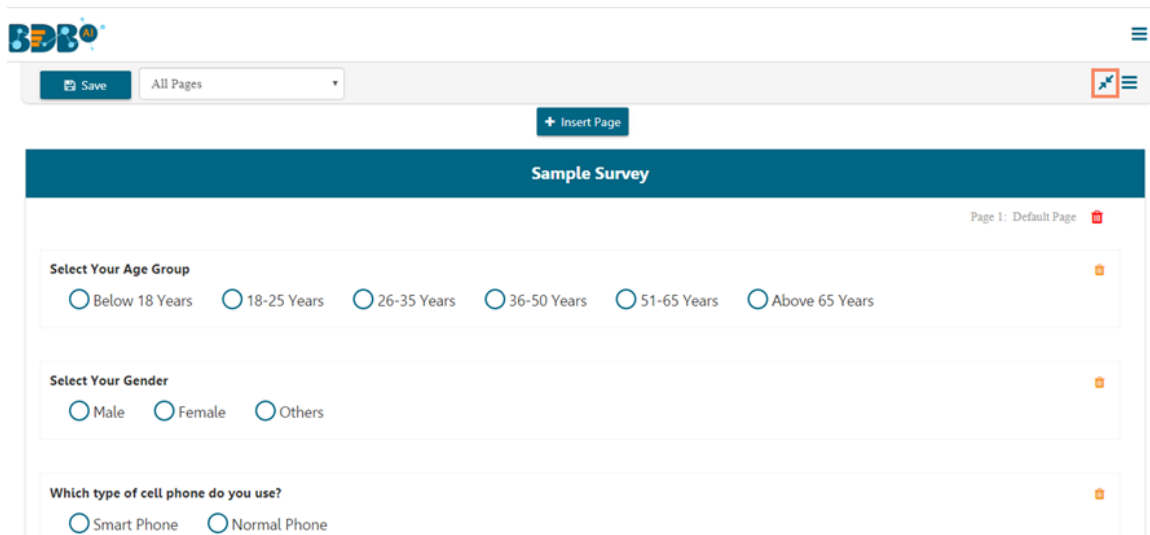
- iii) After all the modifications are successfully saved, the 'Questions' option will open by default.




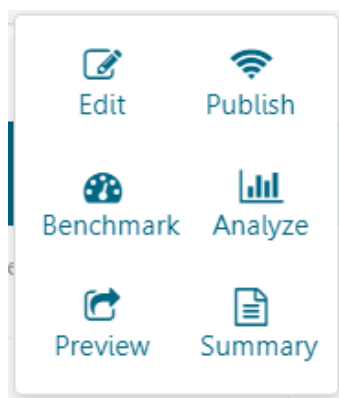
**Note:** While inserting questions to a survey, it will save only those questions for what **'Save'** option was clicked.

- **Other Related Options:**

- Click the **'Maximize'** icon  to display the survey questions in full screen ( the Maximize icon changes into the **'Minimize'** icon  as shown in the following image):



- Click the **'More Options'** icon  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.

- 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.

### • Other Related Options:

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

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

The collector is an integral part of 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:

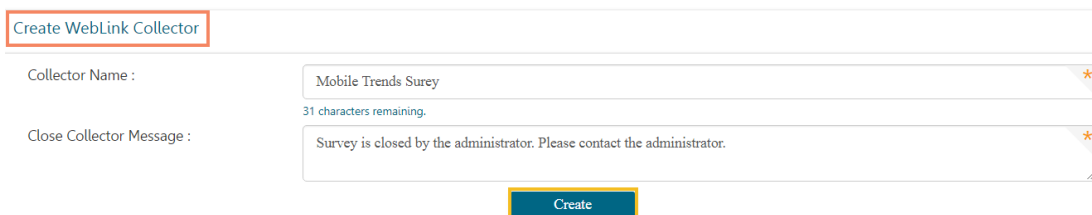
### Now Create Collector Using :

WebLink Collector  
OR  
Email Collector

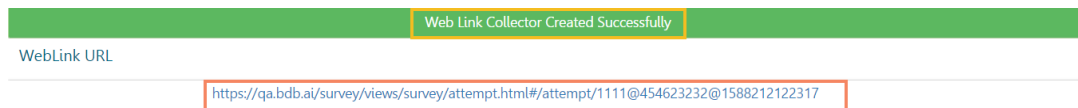
- iii) The user can select any one option by a click on it.
- OR**
- i) Navigate to the **'Publish Your Survey'** list.
  - ii) Four options will be provided next to the published name of a survey.
  - iii) The first two options (  and  ) can be used to create a new collector.

### 6.3. Creating a Web Link Collector

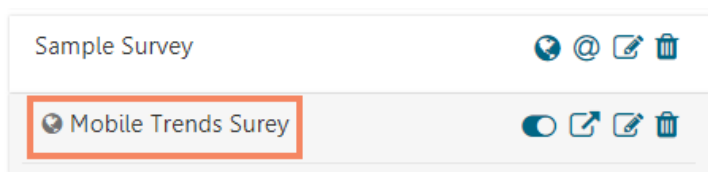
- i) Click the **'WebLink Collector'** or **'Add Web Link Collector'**  option.
- ii) The **'Create Weblink Collector'** page will be displayed.
- iii) Enter a name for the collector (Maximum limit given is of 50 characters).
- iv) Click the **'Create'** option.



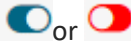




- v) A message appears to inform that the survey creation of the Web Link Collector.
- vi) The Web Link Collector gets created and appears below the message.



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

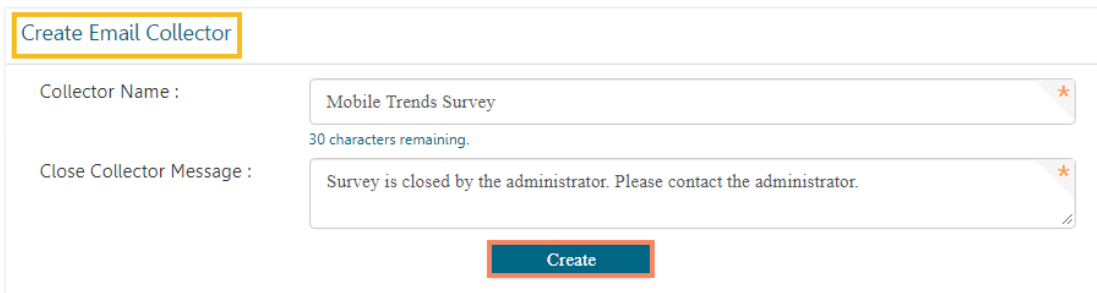


- **Related Options:**

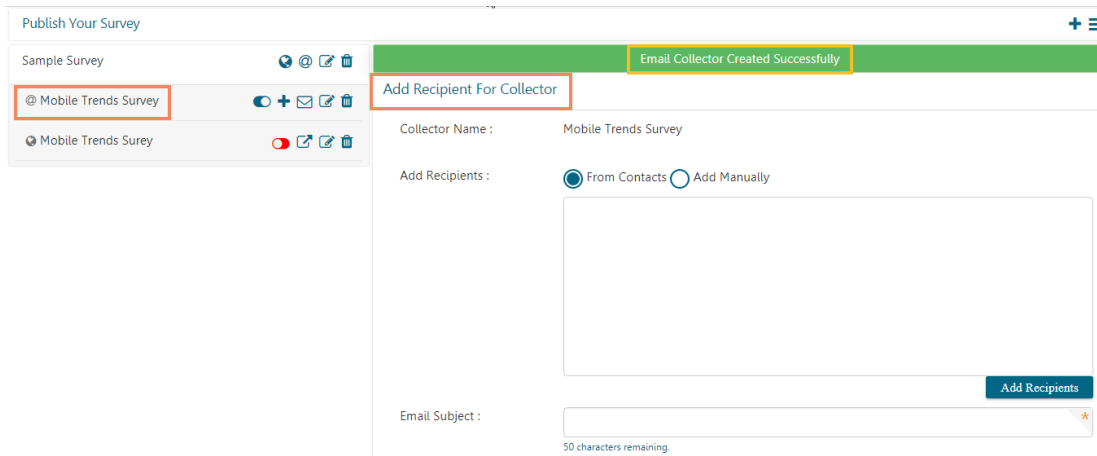
Icon	Name	Allotted Function
 or 	Switched On/Off	Switch On/Off button to enable or disable the Weblink.
	View URL Link	Displays the URL (link) for the weblink collector.
	Edit Weblink Collector	Allows editing the Weblink Collector settings for the end-users.
	Delete Collector	Deletes the created weblink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

## 6.4. Creating an Email Collector

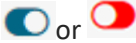





- Click the **'Email Collector'** or **'Add Email Collector'** option
- 'Create Email Collector'** page will be displayed.
- Enter a name for the collector (Maximum limit given is of 50 characters).
- Click the **'Create'** option.



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



- **Related Options:**

Icon	Name	Allotted Function
 or 	Switched On/Off	
	Add Recipients	Adds Recipients to email collector
	Track Email Responses	Tracks the collected email responses
	Edit Email Collector	Edits collector settings for the end-users
	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 Collector**

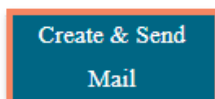
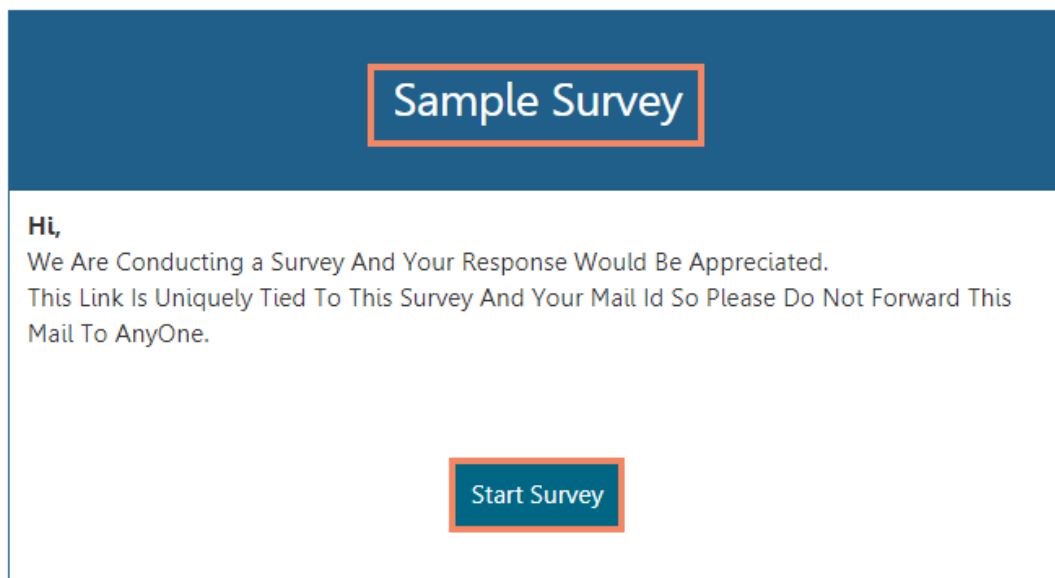
---

Collector Name : Mobile Trends Survey

Add Recipients :  From Contacts  Add Manually

- **Email Subject:** Enter a Subject
  - **Body of Email:** It displays a prewritten message. This message can be modified.
- iv) Click on the **'Add Link'** option to add the collector link.
- v) Click on the **'Create & Send Mail'** option.





vi) A mail 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.

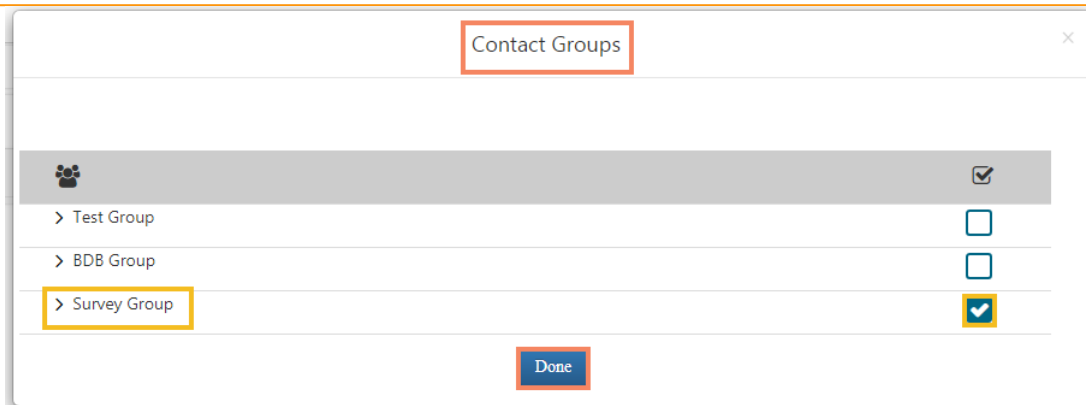
#### Add Recipient For Collector

Collector Name : Mobile Trends Survey

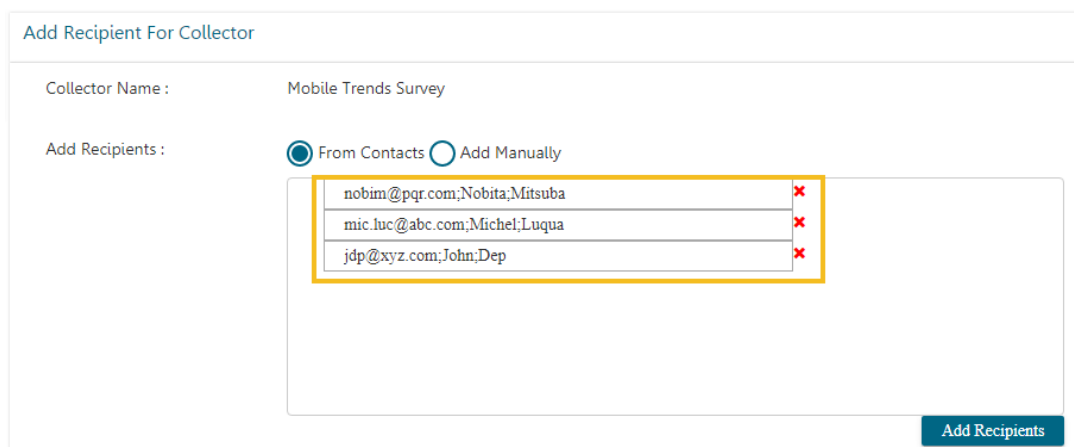
Add Recipients :  From Contacts  Add Manually

Add Recipients

- 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.

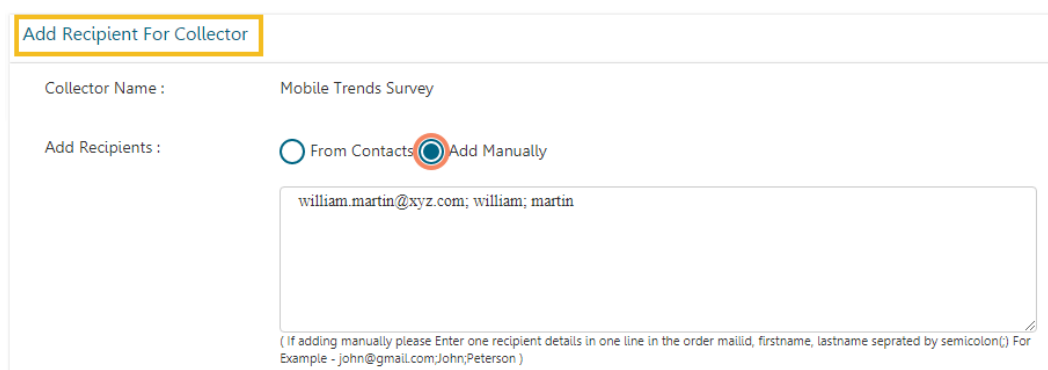


vii) The contacts from the selected Contact Group(s) get added as recipients.



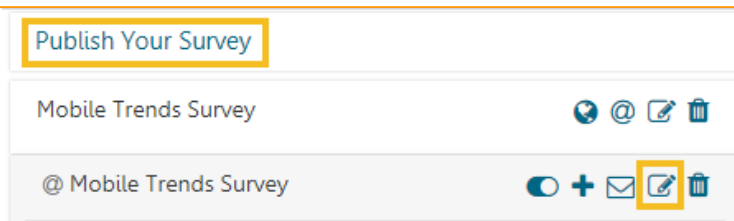
## 2. Adding Recipients Manually

- 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: [email@email.com; first name; last name](#)

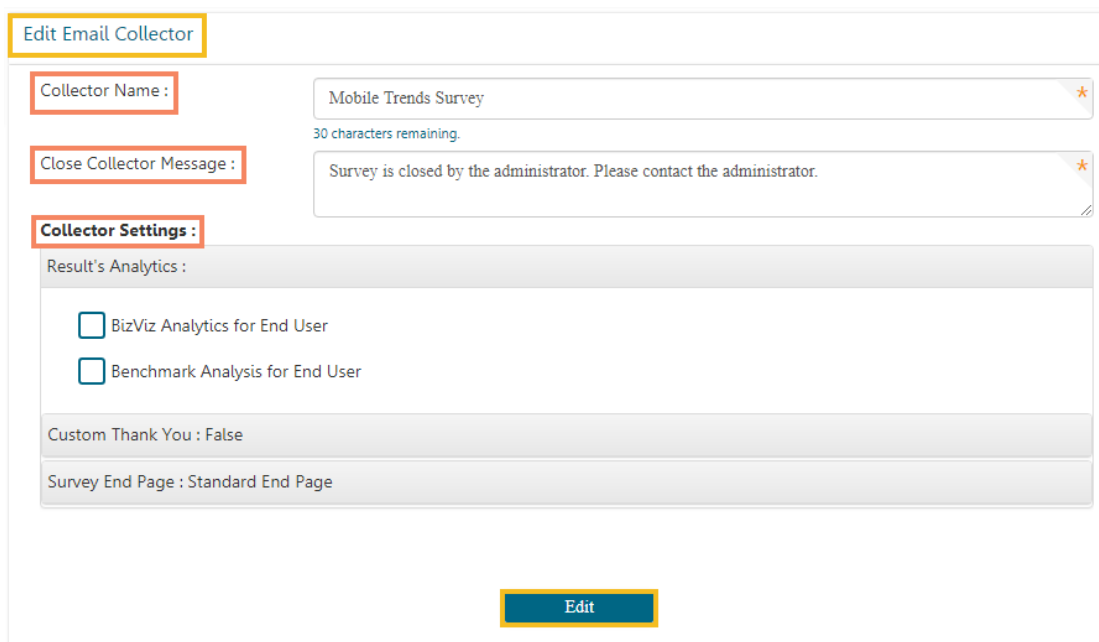


## 6.5. Editing Collector(s)

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



- 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.



## • 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

### Collector Settings :

Result's Analytics :

BizViz Analytics for End User

Select Questions : [Select questions for End user](#)

Public Link Status :  ACTIVE  IN-ACTIVE

Public URL : <https://app.bdb.ai/survey/views/survey/attempt.html#/SurveyAnalyticalResult/bbTKko7F8wwND5Kxh3DXgUmiWYS0OIKK>

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

Would you like to display Filters or filtered data of a View to end user :  Yes  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  IN-ACTIVE


Public URL: [https://www.bizvzsurvey.com/views/survey/attempt.html#/SurveyAnalyticalResult/r6xc-iTWkLmpmgYU4sXRxL-BFEJ9Z\\_WY9-7RSJVeI](https://www.bizvzsurvey.com/views/survey/attempt.html#/SurveyAnalyticalResult/r6xc-iTWkLmpmgYU4sXRxL-BFEJ9Z_WY9-7RSJVeI)

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

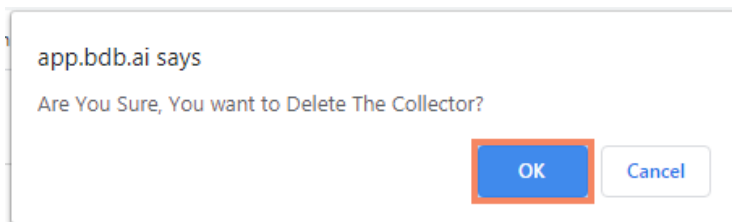
Would you like to display Filter to end user: (If you select Yes then filter created in analysis will not apply)  Yes  No

**Note:** 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**'  icon provided next to a collector name.
- iii) A pop-up window will appear to confirm the deletion.

iv) Click 'OK.'




v) The selected collector gets deleted.

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

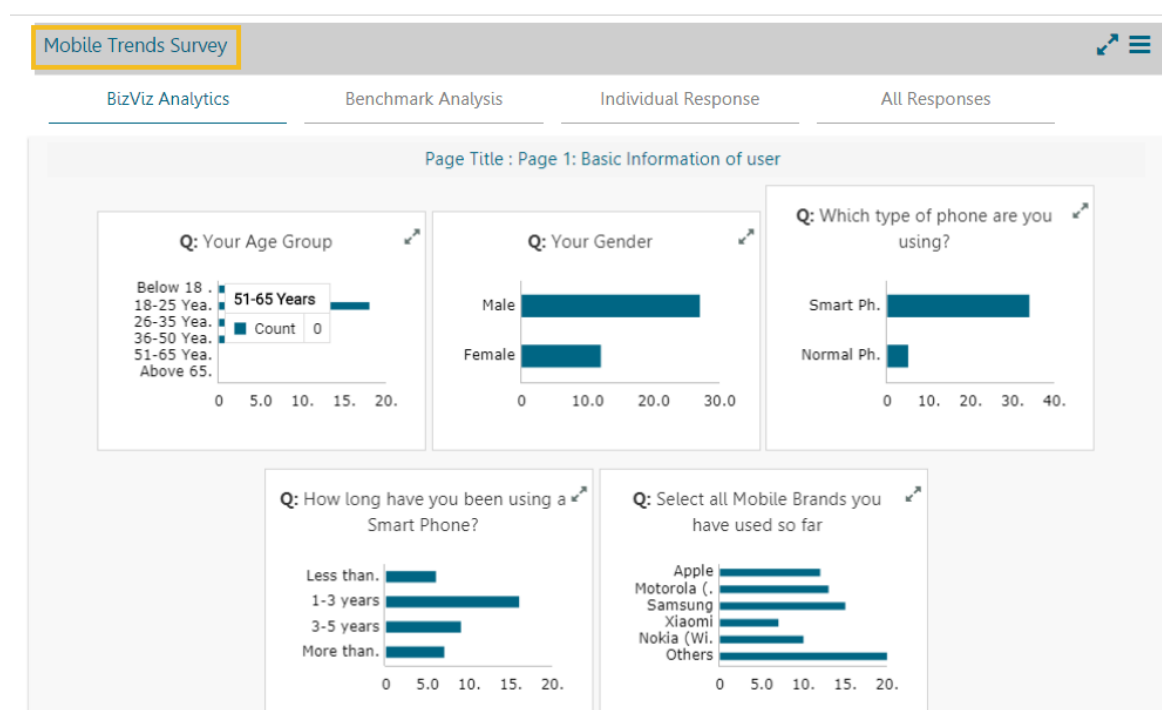
## 7. Analyzing Result for a Survey

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

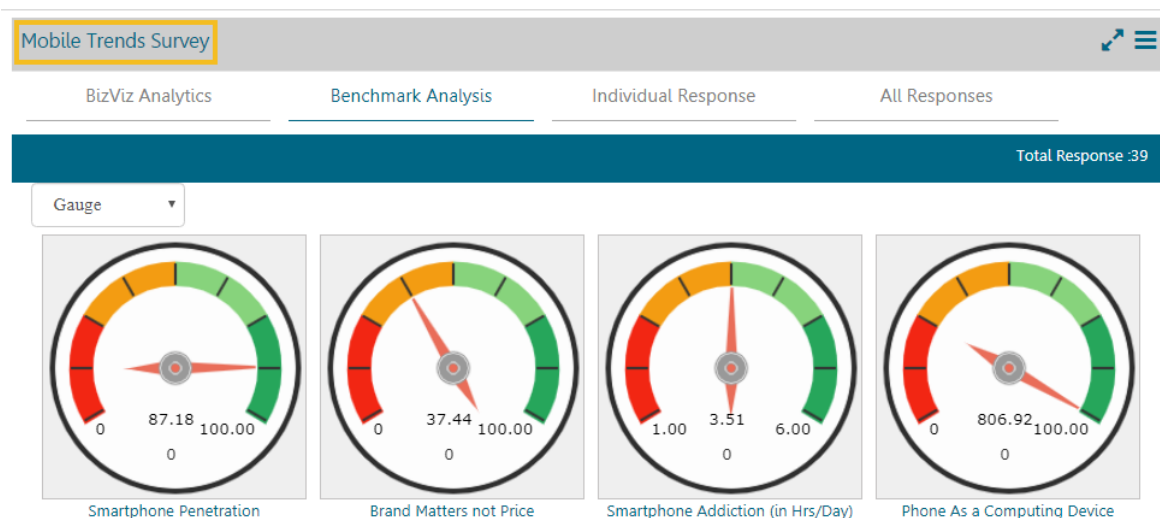
This section displays question specific analysis of the survey responses through graphical charts.



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

## 7.2. Benchmark Analysis

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



## 7.3. Individual Response

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

The 'Individual Response' view for the 'Mobile Trends Survey' shows the following details:

Collector Title :	Mobile Trends Survey	Completion Status :	COMPLETED
Collector Type :	WEB_LINK	Collector Status :	OPEN
Attempted On :	04/12/2016	IP Address :	115.119.248.130

**Page Title: Page 1: Basic Information of user**

**Q: Your Age Group**  
Below 18 Years,

**Q: Your Gender**  
Female,

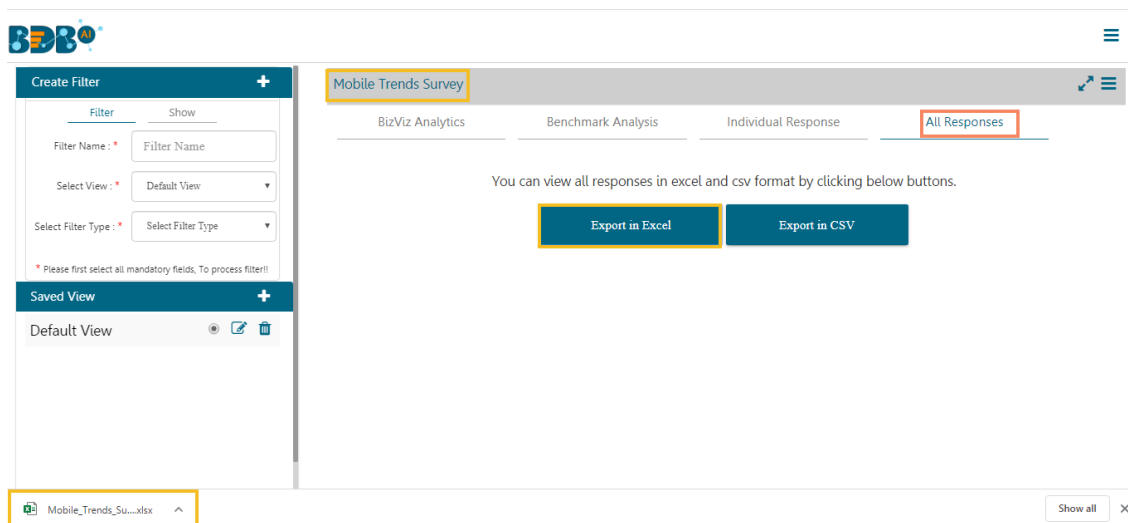
**Q: Which type of phone are you using?**  
Normal Phone,

## 7.4. All Responses

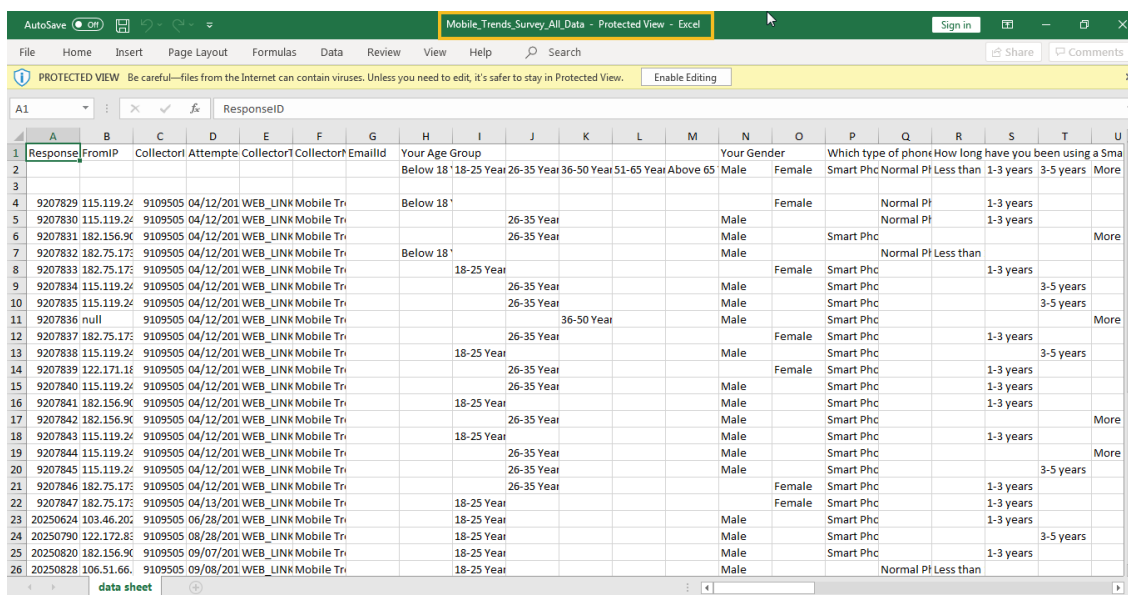
All the responses recorded from all the recipients for a survey are presented through this option.

- 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.



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



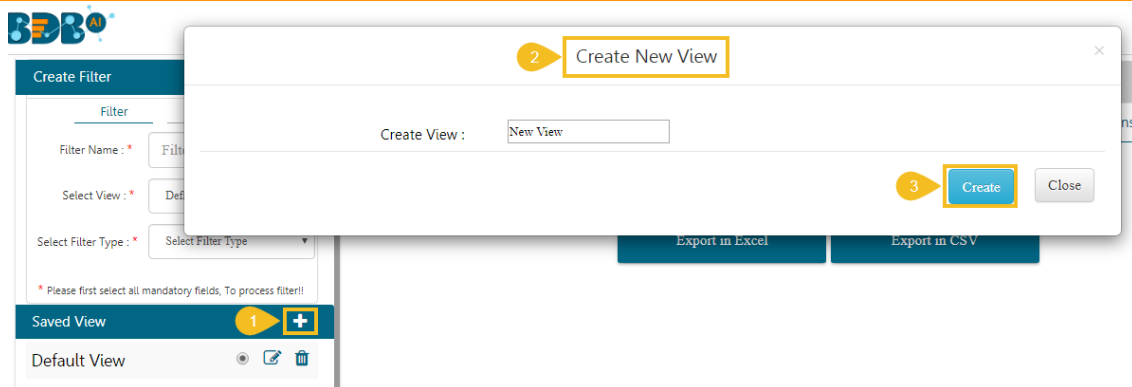
## 2. Export in CSV:

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.

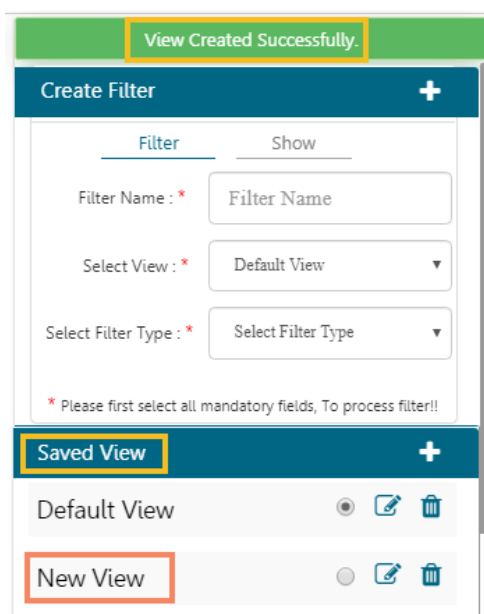
## 7.5. Creating a New View in the Analyze Result

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.



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



Note: 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.

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

### 7.6.2. Managing a Created Filter

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

Icon	Name of the Icon	Function
------	------------------	----------

	Applied/ Apply button	Activates or deactivates the applied filter rules.
	Edit	Modifies or changes the filter name, filter view, and choices for the filter types.
	Delete	Removes the selected filter.

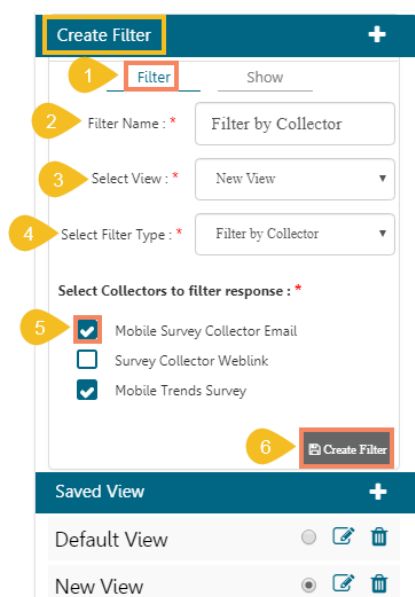
### 7.6.3. Filter Logic

- 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
  - Not Completed
  - Attempted Responses
  - Disqualified Responses

The screenshot shows the 'Create Filter' dialog box with the following configuration:

- 1. Tab: Filter
- 2. Filter Name: Filter
- 3. Select View: New View
- 4. Select Filter Type: Filter by Completeness
- 5. Select Response Status to filter response:
  - Completed Responses
  - Not Completed
  - Attempted Responses
  - Disqualified Responses
- 6. Create Filter button

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:
  - IP Address
  - Email Address
  - First Name
  - Last Name
- The collected responses can be filtered based on anyone's metadata criteria.

The screenshot shows the 'Create Filter' dialog box with the following configuration:

- 1. Tab: Filter
- 2. Filter Name: Filter
- 3. Select View: New View
- 4. Select Filter Type: Filter by Respondent Metadata
- 5. Respondent Metadata to filter response:
  - IP Address: XXXX.XXXX.XXXX.XXXX
  - 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".
- 6. Create Filter button

#### 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.

The screenshot shows the 'Create Filter' interface with the following configuration:

- 1** Filter: The 'Filter' tab is selected.
- 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: The 'Create Filter' button is highlighted.

#### 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.

The screenshot shows the 'Create Filter' interface with the following configuration:

- 1** Filter: The 'Filter' tab is selected.
- 2** Filter Name: \* Filter
- 3** Select View: \* New View
- 4** Select Filter Type: \* Filter by Skipped Question
- 5** Select Question to filter response: \*
  - Your Age Group
  - Your Gender
  - 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
  - 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: The 'Create Filter' button is highlighted.

## 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).

The screenshot shows the 'Create Filter' interface. It has a header with 'Create Filter' and a plus sign. Below the header are two tabs: 'Filter' (selected) and 'Show'. The form contains the following fields:

- Filter Name: \* Gender Filter
- Select View: \* New View
- Select Filter Type: \* Filter by Question and Answer
- Select Question: \* Your Gender
- Select Option:
  - Male
  - Female

A 'Create Filter' button is located at the bottom right of the form.

- 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

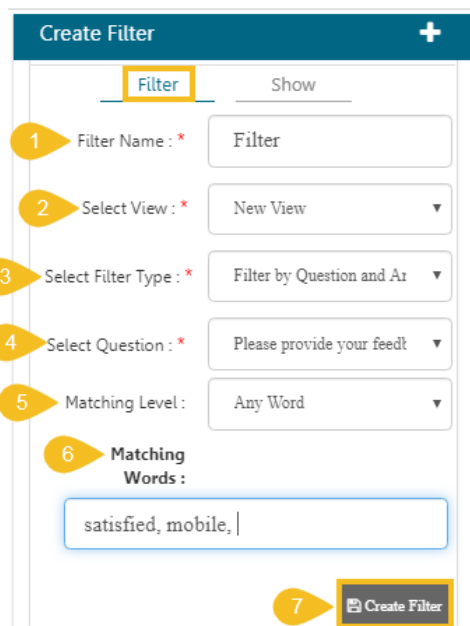
The screenshot shows the 'Create Filter' interface for a comment question. It has a header with 'Create Filter' and a plus sign. Below the header are two tabs: 'Filter' (selected) and 'Show'. The form contains the following fields:

- Filter Name: \* Filter
- Select View: \* Default View
- Select Filter Type: \* Filter by Question and Answer
- Select Question: \* Give your comment
- Matching Level: \* All Words
- Matching Words: satisfaction, smart phone

A 'Create Filter' button is located at the bottom right of the form.

## 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



## 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

Create Filter
+

Filter
Show

Filter Name : \*

Select View : \*

Select Filter Type : \*

Select Question : \*

Matching Level :

**Matching Words :**

#### 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 : \*

Select View : \*

Select Filter Type : \*

Select Question : \*

Choose a Row:

Matching Level :

**Matching Words :**

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 : \*

Select View : \*

Select Filter Type : \*

Select Question : \*

Matching Level :

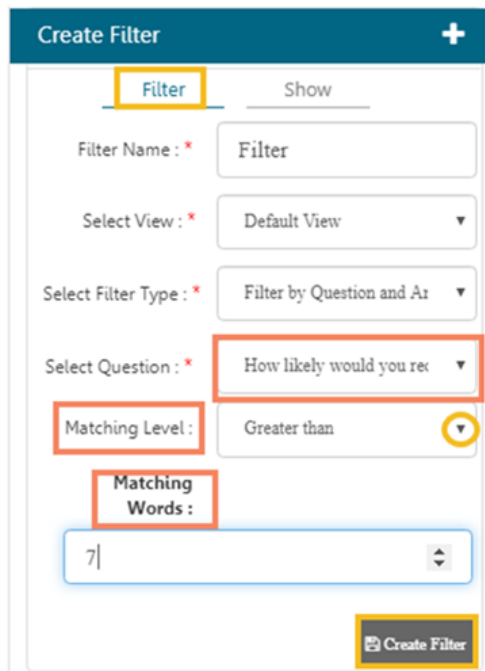
**Matching Words :**

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



## 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 : \*

Select View : \*

Select Filter Type : \*

Select Question : \*

Matching Level :

 ▼

Select Date/Time

05/04/2020 4:38 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 : \*

Select View : \*

Select Filter Type : \*

Select Question : \*

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.

#### 10. Single Answer Picture:

- a. Responses can be filtered by matching the selected option from the Users' response.
- b. Users can select only one option to filter the responses. The selected option will be reflected in all the tabs on the right panel.
- c. Users are provided with extra information.  
E.g., An image gets provided with each option to express the option very clearly.

#### 11. Multiple Answer Picture:

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

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

## 12. Net Promoter Score:

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

### 13. Multiple Choice Multiple Answer:

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

The screenshot shows the 'Create Filter' dialog box with the following configuration:

- Filter Name:** Filter
- Select View:** Default View
- Select Filter Type:** Filter by Question and An
- Select Question:** Multiple Choice Multiple
- Select Option:**
  - Option 1
  - Option 2
  - Option 3
  - Option 4
- Create Filter:** Button at the bottom right.

### 14. Rating Scale:

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

The screenshot shows the 'Create Filter' dialog box with the following configuration:

- Filter Name:** Filter
- Select View:** Default View
- Select Filter Type:** Filter by Question and An
- Select Question:** Rating Scale Type Answer
- Select Row:** Row 1
- Select Column:**
  - Column 1
  - Column 2
  - Column 3
- Create Filter:** Button at the bottom right.

- Based on the above selection response gets filtered.

### 15. Matrix Single Answer Per Row:

- Responses can be filtered by matching the selected option from the Users' response.
- 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.
- Each selection is mandatory.

The screenshot shows the 'Create Filter' dialog with the following configuration:

- 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:** Column 2 (selected via radio button)

### 16. Matrix Multiple Answer Per Row:

- Responses can be filtered by matching the selected option from the Users' response.
- 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.
- Each selection is mandatory.

The screenshot shows the 'Create Filter' dialog with the following configuration:

- 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 2 and Column 3 (selected via checkboxes)

### 17. Ranking:

- Responses can be filtered by matching the selected option from the Users' response.
- 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.
- Each selection is mandatory.

The screenshot shows the 'Create Filter' dialog with the following configuration:

- Filter Name:** Filter
- Select View:** Default View
- Select Filter Type:** Filter by Question and Ar
- Select Question:** Ranking
- Select Row:** Option 3
- Select Column:** Radio buttons for 1, 2, and 3.

### 18. Dropdown:

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

The screenshot shows the 'Create Filter' dialog with the following configuration:

- Filter Name:** Filter
- Select View:** Default View
- Select Filter Type:** Filter by Question and Ar
- Select Question:** Dropdown Type Questior
- Select Option:** Radio buttons for Option 1, Option 2, Option 3, and Option 4.

## 19. Dropdown Multiple Selection:

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

The screenshot shows the 'Create Filter' dialog box with the following configuration:

- Filter Name:** Filter
- Select View:** Default View
- Select Filter Type:** Filter by Question and An
- Select Question:** Dropdown Multiple Sele
- Select Option:**
  - Option 1
  - Option 2
  - Option 3
  - Option 4
  - Option 5
- Create Filter** button

## 20. Multiple Dropdown Same Option:

- Responses can be filtered by matching the selected option from the Users' response.
- 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.
- Each selection is mandatory.

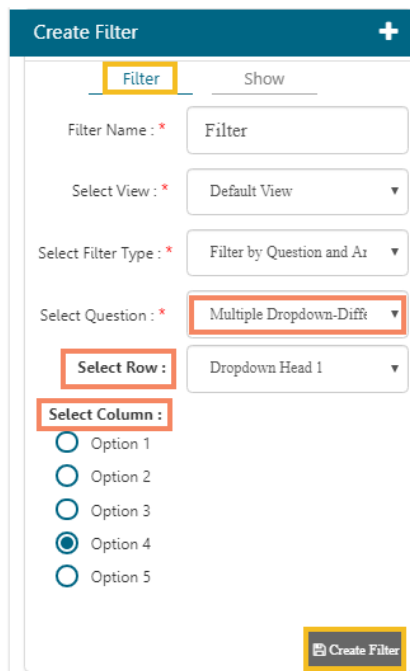
The screenshot shows the 'Create Filter' dialog box with the following configuration:

- Filter Name:** Filter
- Select View:** Default View
- Select Filter Type:** Filter by Question and An
- Select Question:** Multiple Dropdown-Sam
- Select Row:** Dropdown Head 1
- Select Column:**
  - Option 1
  - Option 2
  - Option 3
  - Option 4
  - Option 5
- Create Filter** button



## 21. Multiple Dropdown Different Option:

- Responses can be filtered by matching the selected options from Users' responses.
- 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.
- Each selection is mandatory.

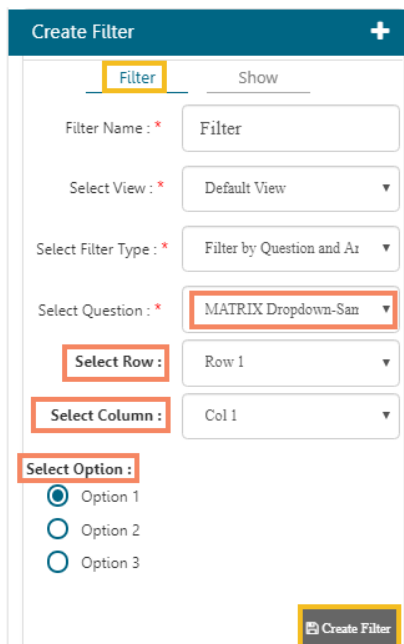


The screenshot shows the 'Create Filter' interface. The 'Filter' tab is active. The form includes the following fields:

- Filter Name:** Text input field containing 'Filter'.
- Select View:** Dropdown menu set to 'Default View'.
- Select Filter Type:** Dropdown menu set to 'Filter by Question and Ar'.
- Select Question:** Dropdown menu set to 'Multiple Dropdown-Diff'.
- Select Row:** Dropdown menu set to 'Dropdown Head 1'.
- Select Column:** Radio button group with five options: Option 1, Option 2, Option 3, Option 4 (selected), and Option 5.
- Create Filter:** Button at the bottom right.

## 22. Matrix of Dropdown Same Option:

- Responses can be filtered by matching the selected options from Users' responses.
- 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.
- Each selection is mandatory.



The screenshot shows the 'Create Filter' interface. The 'Filter' tab is active. The form includes the following fields:

- Filter Name:** Text input field containing 'Filter'.
- Select View:** Dropdown menu set to 'Default View'.
- Select Filter Type:** Dropdown menu set to 'Filter by Question and Ar'.
- Select Question:** Dropdown menu set to 'MATRIX Dropdown-San'.
- Select Row:** Dropdown menu set to 'Row 1'.
- Select Column:** Dropdown menu set to 'Col 1'.
- Select Option:** Radio button group with three options: Option 1 (selected), Option 2, and Option 3.
- Create Filter:** Button at the bottom right.

### 23. Matrix of Dropdown Different Option:

- Responses can be filtered by matching the selected options from Users' responses.
- 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.
- Each selection is mandatory.

The screenshot shows the 'Create Filter' dialog with the following configuration:

- Filter Name:** Filter
- Select View:** Default View
- Select Filter Type:** Filter by Question and Ar
- Select Question:** MATRIX Dropdown-Dif
- Select Row:** Row 3
- Select Column:** Col 2
- Select Option:** Option 4 (selected)

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

- Responses can be filtered by matching the selected options from Users' responses.
- 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.
- Each selection is mandatory.

The screenshot shows the 'Create Filter' dialog with the following configuration:

- 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 1
- Select Second Level:** Level 2 Option 1

## 25. Parent-Child Drop-down for Level 3:

- Responses can be filtered by matching the selected options from Users' responses.
- 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.
- Each selection is mandatory.

### Note:

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

Filter Created Successfully !!!

## 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.

- Navigate to the 'Create Filter' panel on the Analyze Result page.
- Select the '**Show**' tab.

- 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 **Show**

Note: TEXTBOX, DESCRIPTIVE, NUMERICAL\_TEXTBOX, SLIDER, DATE\_TIME, DIGITAL\_SIGNATURE, CONTACT\_DETAILS, MULTIPLE\_TEXTBOX, IMAGE types of questions are not displayed in the BizViz Analytics tab. All these questions are available in Individual Response.

**Page**

**Page 1: Basic Information of user**

- Your Age Group
- Your Gender
- 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 2: Mobile Usage**

- 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 Phone?
- You are taking this Survey on a:

**Page 3: Smartphone Usage**

**Page Title : Page 1: Basic Information of user**

Q: How long have you been using a Smart Phone?

Less than.	4
1-3 years	12
3-5 years	10
More than.	6

Q: Select all Mobile Brands you have used so far

Apple	15
Motorola	10
Samsung	12
Others	18
Nokia	8

**Page Title : Page 2: Mobile Usage**

Q: On an average day, how long do you use your Phone?

< 1 Hour	4
1-2 Hours	6
2-3 Hours	8
3-4 Hours	10
4-5 Hours	6
> 5 Hours	4

Q: You are taking this Survey on a:

PC/Laptop	35
Tablet	5
Mobile Ph.	10

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.

Search Survey

Create Survey

Product Customer Satisfaction Survey

Created On : 05/05/2020 Completed Responses : 1 Not Completed Responses : 6

Demo Survey 20 April

Created On : 04/20/2020 Completed Responses : 0

Feedback Survey

Preview Survey

Benchmark

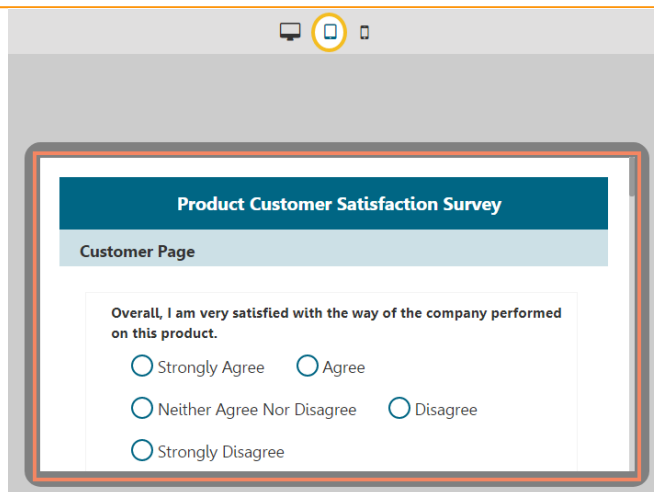
Manage Datamart

Survey Summary

Copy 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.



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

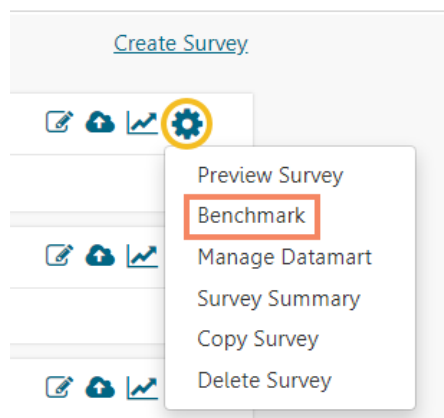
Note: By default, the Desktop preview will open.

## 8.2. Benchmark

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

### 8.2.1. Editing a Benchmark

- i) Select a survey from the Survey list.
- ii) Click the 'More Options' 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 :  \*  
17 characters remaining.

Benchmark Mission :

Benchmark 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 :**  \*  
37 characters remaining.

**Goal Description :**

**Upper Threshold :**

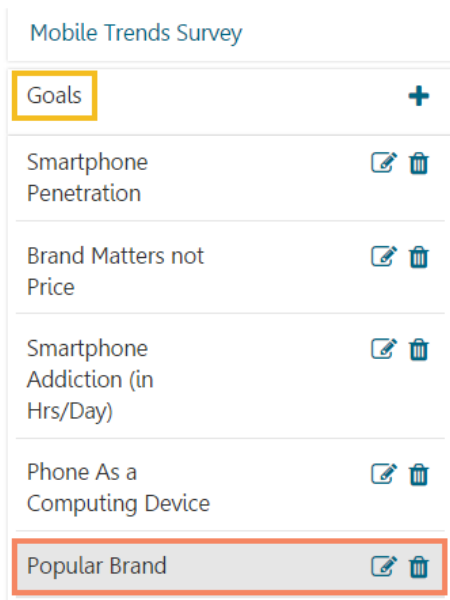
**Lower Threshold :**

**Operation On Goal Question Values :**  ▼

**Is High Value True :**  ▼

**Save**

vi) A Benchmark goal gets added to the benchmark.



**Note:**


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

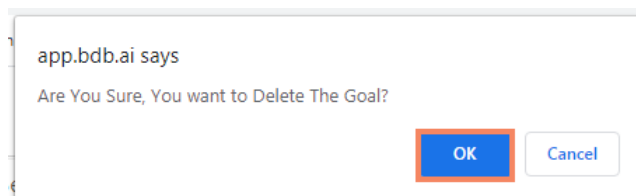
### 8.3. Editing a Benchmark Goal

- i) Click the 'Edit' icon provided next to a Benchmark goal name (on the left pane of the page) 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.

- iv) The edited goal information will be saved.

### 8.3.1. Deleting a Benchmark Goal

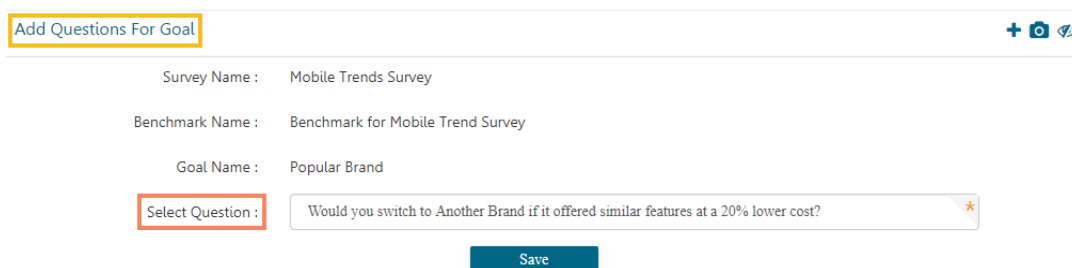
- i) Select the 'Delete'  icon provided next to the benchmark goal name (on the left pane of the page).
- ii) A dialog window appears to confirm the action of deletion.
- iii) Click the 'OK' option.



- 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.



- 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% lower cost?

Highly Likely :

Likely :

Not Sure :

Will Change @ >40% discount :

Not at All :

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 :  \*

Save

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

Add Questions For Goal

+ 📷 🗨

Question 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

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	

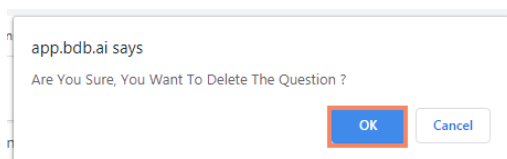
Showing 1 to 1 of 1 entries

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' icon provided under 'Actions'.
- iii) A dialog window appears to confirm the deletion.
- iv) Click the 'OK' option.



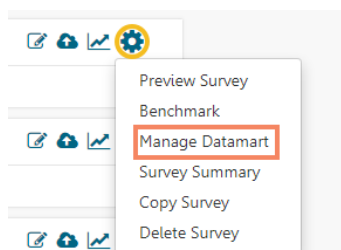
- v) The selected question gets removed from the benchmark goal.

## 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 :

Database Name :

URL :

Port :

User Name :

Password :

Datamart Description :

\*\* Any Changes in Datamart detail may cause to recreate Datamart at given ip address.  
 \*\* To update new record in datamart use "Update Record" button.  
 \*\* To get 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'** icon.

**View Datamart Details for Survey: Mobile Trends Survey**

Datamart Status : Your Last Datamart Was Created Successfully.

Last Updated : 2020-05-08 12:07:07

Database Type :

Database Name :

URL :

Port :

User Name :

Password :

Datamart Description :

- ix) The created Datamart gets displayed on the page.

**Manage Datamart of Your Survey**

nidhidatamarttest

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

## 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.

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

- 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 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

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 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

Update Scheduler Stop 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
  Yearly

Start date: 05/14/2020 7:39 PM

Every 1 hour(s)
  At 03:00 hour(s)

End date: 05/15/2020 7:39 PM

- 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

Scheduler View

Hourly
  Daily
  Weekly
  Monthly
  Yearly

Start date: 05/14/2020 7:39 PM

Every 1 hour(s)
  At 03:00 hour(s)

End date: 05/15/2020 7:39 PM

- 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' 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  

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

[View Datamart Details for Survey: Mobile Trends Survey](#) 

Datamart Status : Your Last Datamart Was Created Successfully.

Last Updated : 2020-05-08 12:07:07

Database Type :  \*

Database Name :  \*

URL :  \*

Port :  \*

User Name :  \*

Password :  \*

Datamart Description :

[Edit Datamart Detail](#) [Update Record](#)

\*\* Any Changes in Datamart detail may cause to recreate Datamart at given ip address.  
 \*\* To update 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.

Update Datamart for Survey: Mobile Trends Survey 🔄

Datamart Status : Your Last Datamart Was Created Successfully.

Last Updated : 2020-05-08 12:07:07

Database Type :  \*

Database Name :  \*

URL :  \*

Port :  \*

User Name :  \*

Password :  \*

Datamart Description :

\*\* Any Changes in Datamart detail may cause to recreate Datamart at given ip address.  
 \*\* To update new record in datamart use "Update Record" button.  
 \*\* To get the latest status of datamart use refresh button of right top corner.

6. The DataMart details get updated successfully.

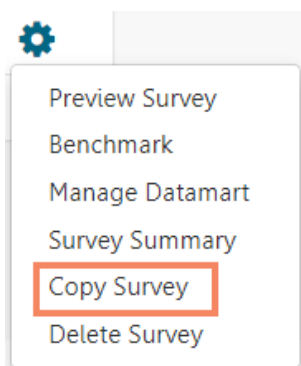
**Notes:**

- 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'**
- iii) Select the **'Copy Survey'** option from the menu.



- 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’.

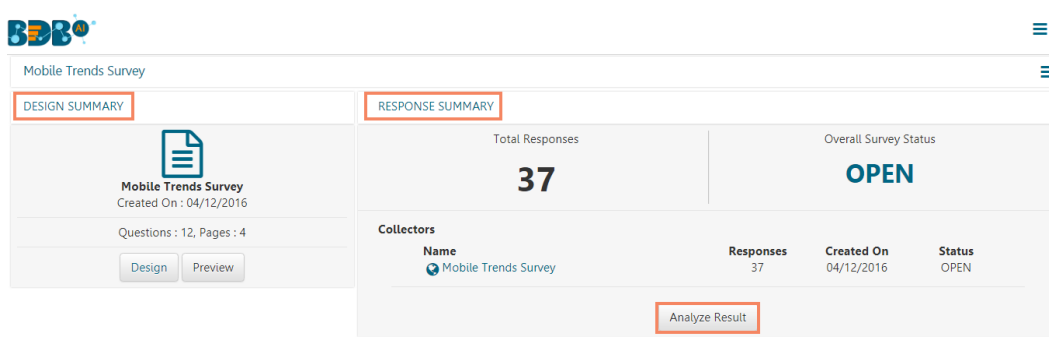


**Note:**

- 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.

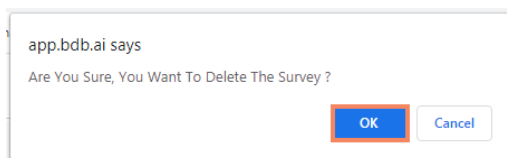
## 8.6. Survey Summary

- 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.



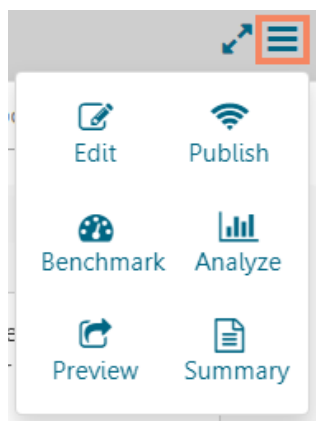
## 8.7. Deleting a Survey

- i) Navigate to the survey home page.
- ii) Click the ‘More Options’ 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.



- 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.

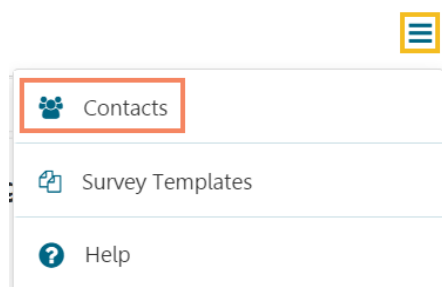


## 9. Contacts

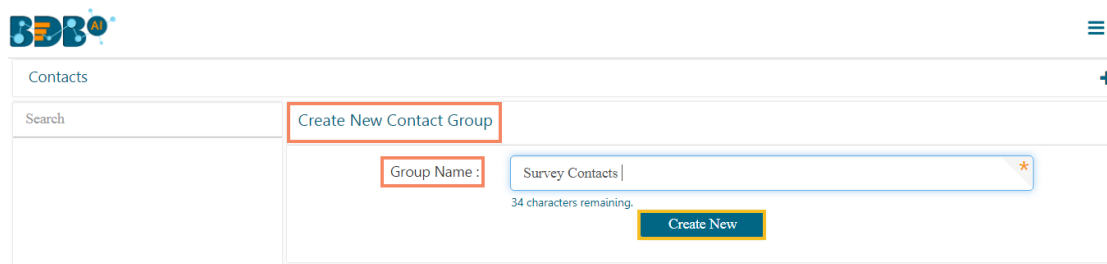
The Contacts section helps to create various contact groups and add recipients to maintain an address book for sharing a survey.

### 9.1. Creating a Contact Group

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

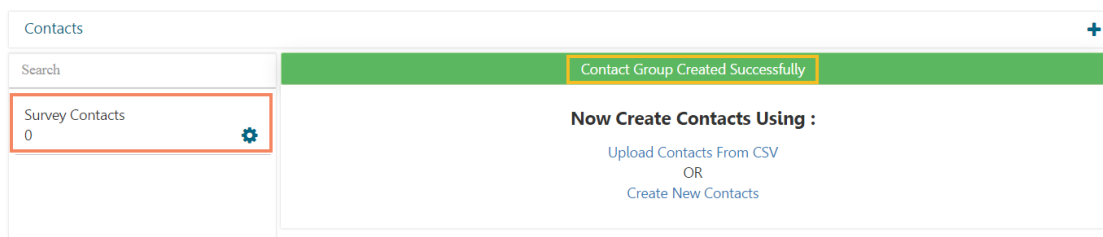


- iv) The '**Contacts**' page opens with the Create New Contact Group.
- v) Enter the '**Group Name**' in the given field to create a new contact group.
- vi) Click the '**Create New**' option.



- 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)



**Note:** Click the 'Add Contact Group' button + to add multiple contact groups.


## 9.2. Creating New Contacts

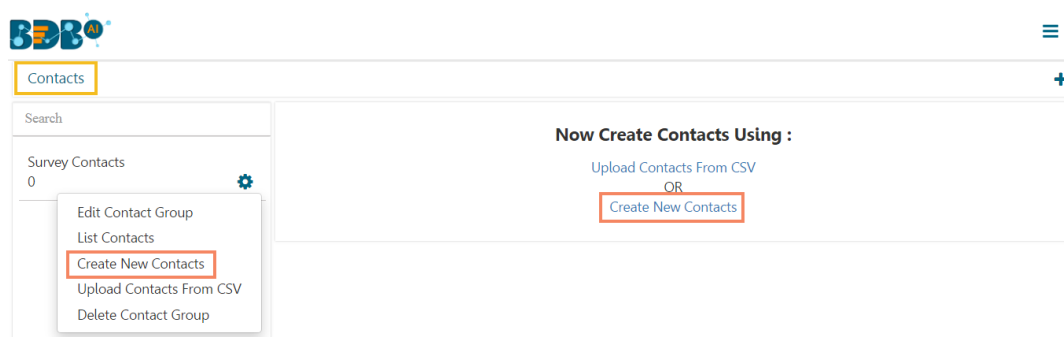
Users can add new contacts into a contact group via the following ways:

### 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

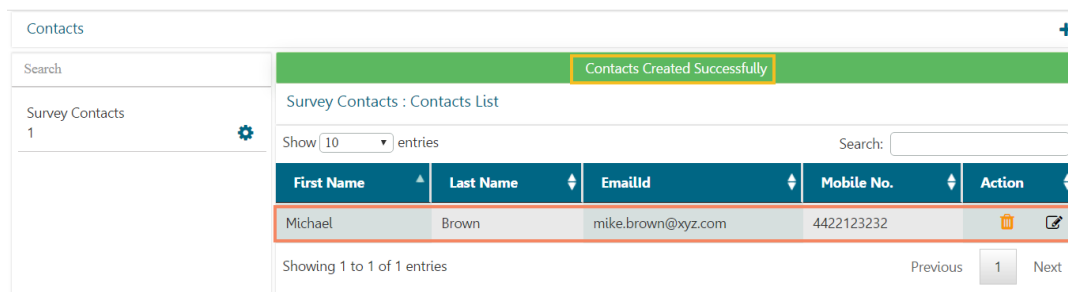
Select the 'Create New Contacts' option from the More Options  context menu provided next to the Contact Name.



- 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.



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



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

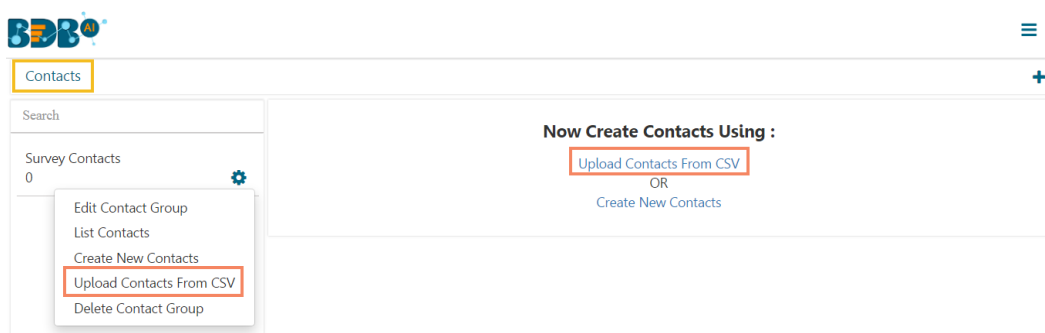


### 9.2.2. Uploading Contacts from CSV File

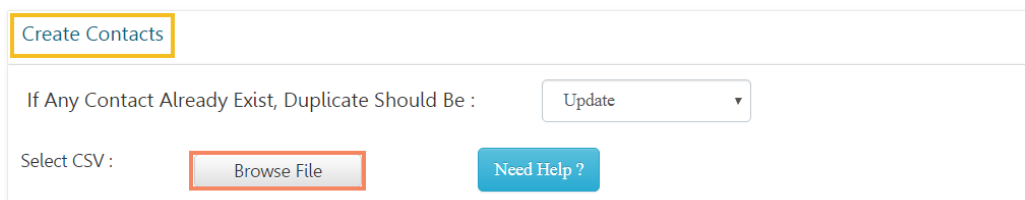
- i) Select the 'Upload Contacts from CSV' option that has been displayed by default after creating a contact group.

OR

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



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



- 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 Already Exist, Duplicate Should Be : Update

Select CSV : Browse File Need Help ?

Show 10 entries Search:

First Name	Last Name	EmailId	Mobile No.	
First Name	Last Name	Email	Telephone No.	<input type="checkbox"/>
John	Dep	jdp@xyz.com	1-143-432-323	<input checked="" type="checkbox"/>
Michel	Luqua	mic.luc@abc.com	1-561-232-322	<input checked="" type="checkbox"/>
Nobita	Mitsuba	nobim@pqr.com	1-145-234-098	<input checked="" type="checkbox"/>

Showing 1 to 4 of 4 entries Previous 1 Next

Submit

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

☰

---

Contacts +

Contacts Created Successfully

Survey Group : Contacts List

Show 10 entries Search:

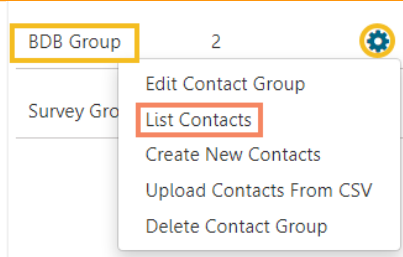
First Name	Last Name	EmailId	Mobile No.	Action
John	Dep	jdp@xyz.com	1-143-432-323	<input checked="" type="checkbox"/>
Michel	Luqua	mic.luc@abc.com	1-561-232-322	<input checked="" type="checkbox"/>
Nobita	Mitsuba	nobim@pqr.com	1-145-234-098	<input checked="" type="checkbox"/>

Showing 1 to 3 of 3 entries Previous 1 Next

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		BDB Group : Contacts List				
Test Group	Count	Search:				
BDB Group	2	Search:				
First Name	Last Name	EmailId	Mobile No.	Action		
Rajat	Gupta	rajat.gupta@bdb.ai	1234567890			
Vivek	Kumar	vivek.kumar@bdb.ai	8019432563			

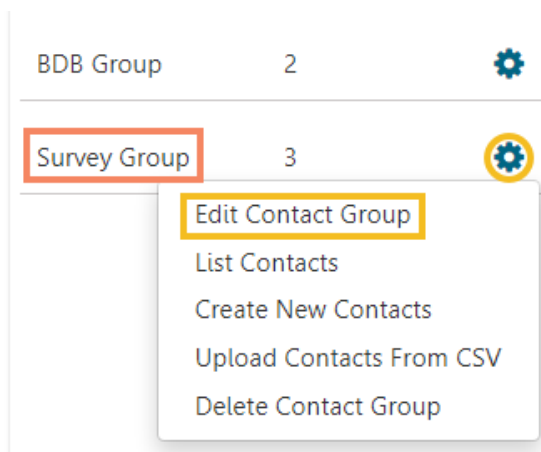
Showing 1 to 2 of 2 entries

Note:

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

## 9.4. Editing a Contact Group

- Click the 'Settings' icon on the contacts page.
- A context menu opens.
- Select the 'Edit Contact Group' option.



- The users get redirected to edit the contact group details.
- Edit the 'Group Name'.
- Click the 'Edit' option.

**Edit Contact Group**

Group Name :  \*

38 characters remaining.


**Edit**



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

Contact Group

Contact Group Updated Successfully.

## 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	
<b>Survey Group</b>	3	

Edit Contact Group

List Contacts

Create New Contacts

Upload Contacts From CSV

**Delete Contact Group**

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

app.bdb.ai says

Are You Sure, You want to Delete The Contact Group?

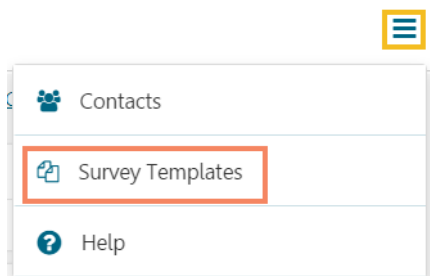
**OK**

vi) The selected contact group gets deleted.

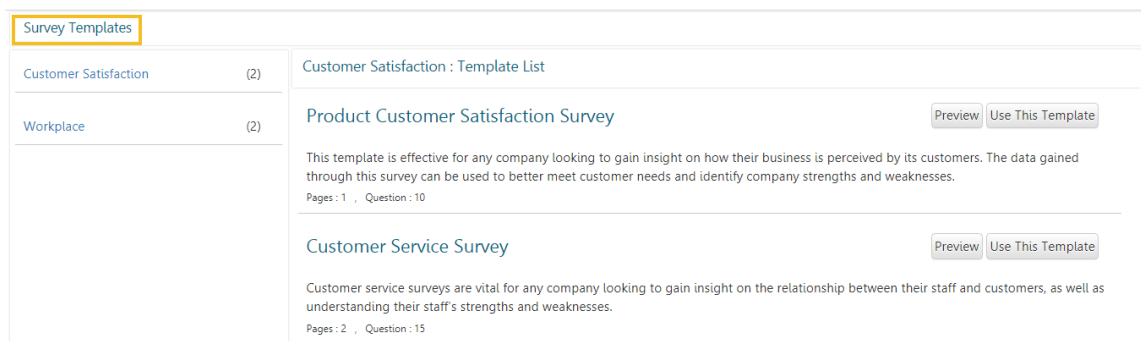
## 10. Survey Template

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

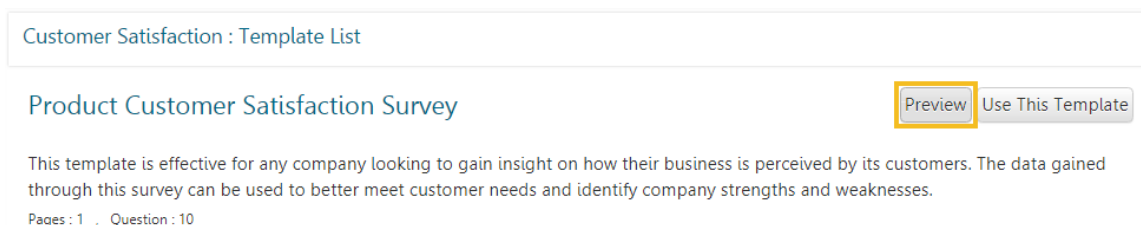
- i) Click the menu  icon on the top right corner.
- ii) A context menu opens.
- iii) Select the 'Survey Templates' option.



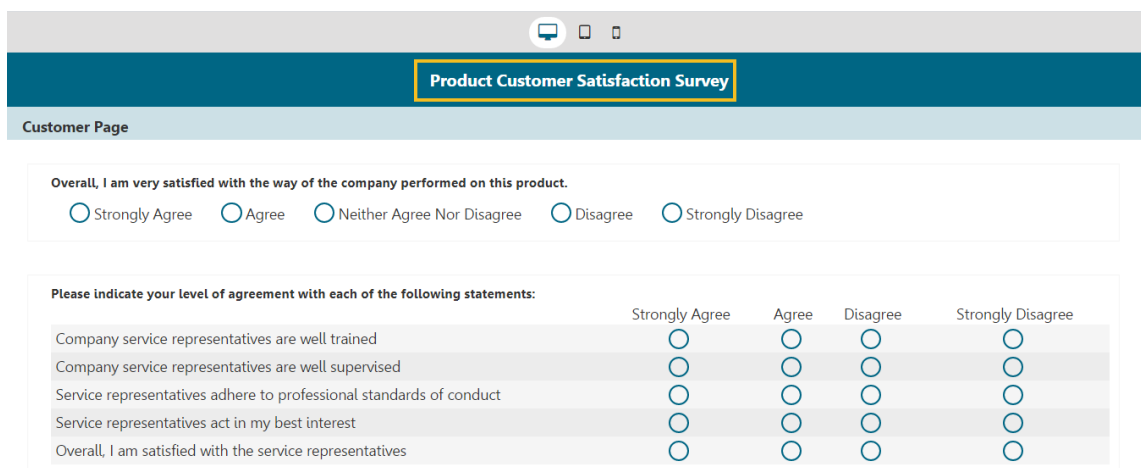
iv) The 'Survey Templates' page opens.



v) Click the 'Preview' option.



vi) The preview of the selected Survey Template opens.



vii) Click the 'Use This Template' option.



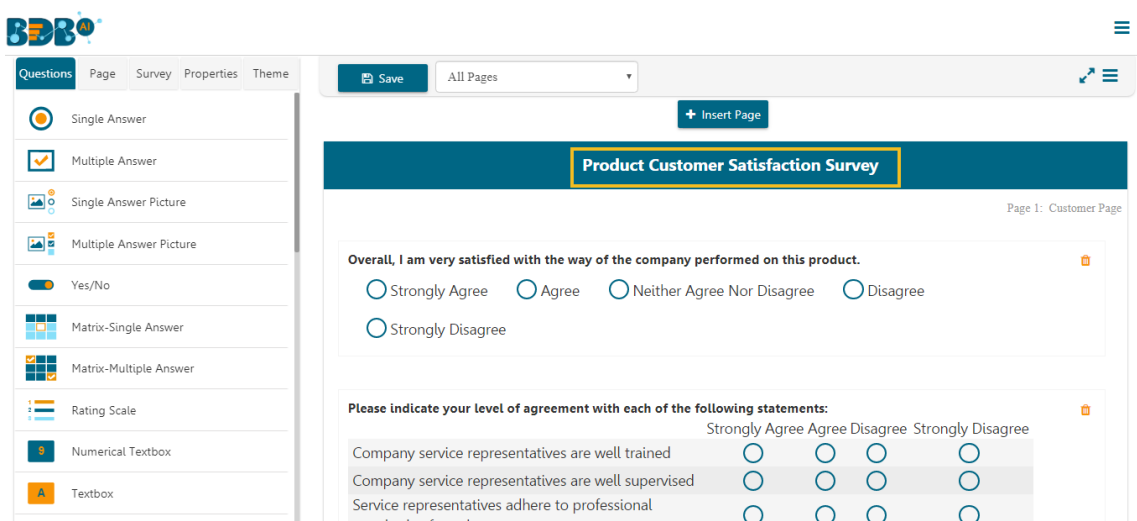
## Product Customer Satisfaction Survey

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.

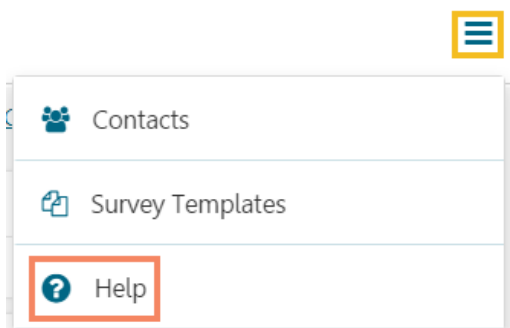


**Note:** By clicking the ‘Use This Template’ option, the users can edit or modify the given questions in the selected Survey Template.

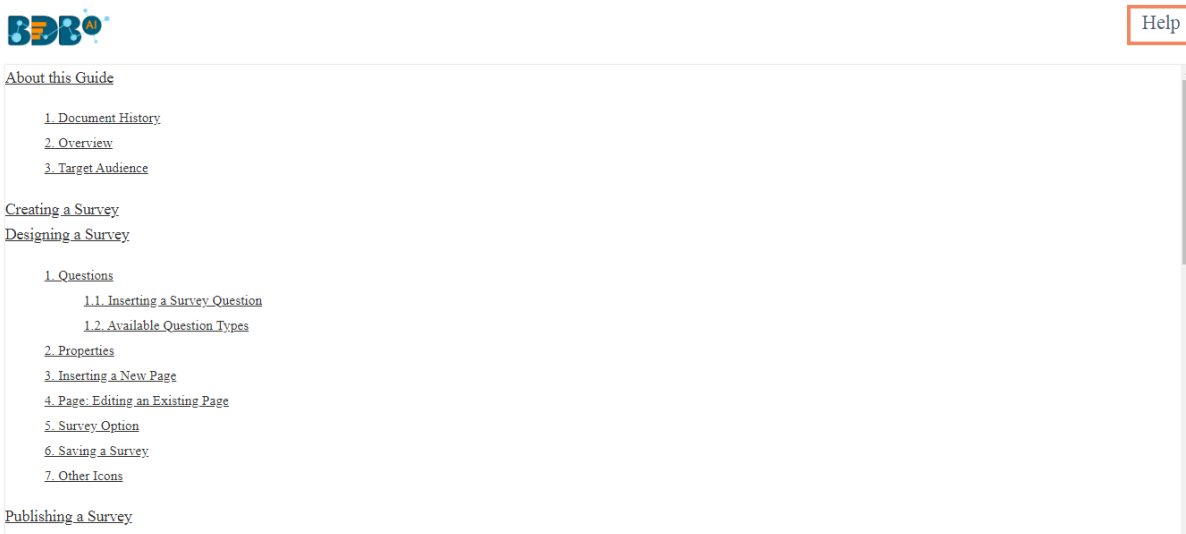
## 11. Help

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

- i) Click the menu  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.



## 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.

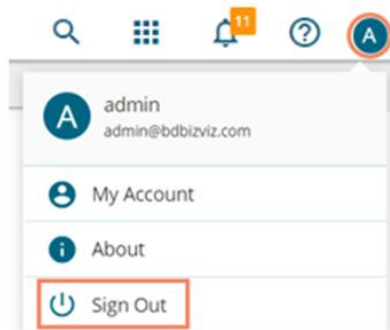


- iii) Closing the Survey window will redirect the user back to the **BDB Platform homepage**.

### 12.2. Signing Off from the BDB Platform

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

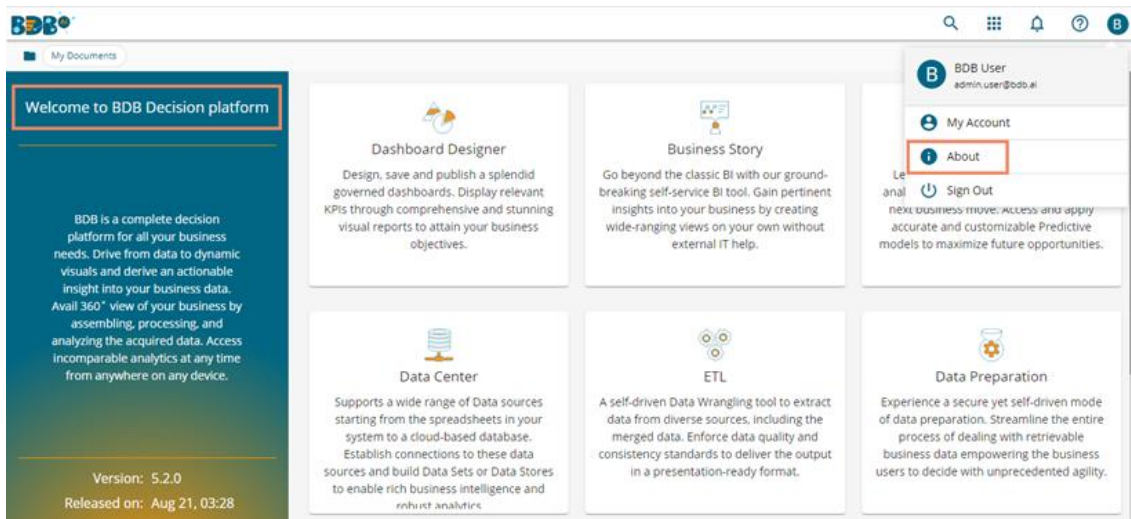
- i) Click the **'User Profile'** icon on the Platform homepage.
- ii) Click the **'Sign Out'** option.



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

**Note:**

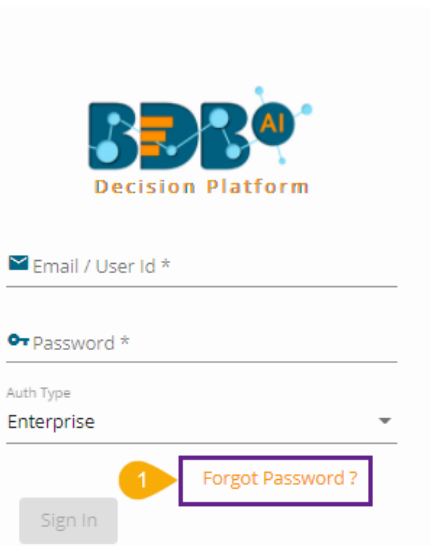
- a. By clicking the **'Sign Out'** option, the user gets back to the Sign-in page of the BDB platform.
- b. Click the **'About'** option to open the default homepage for the BDB Platform.



### 12.3. Forgot Password Option

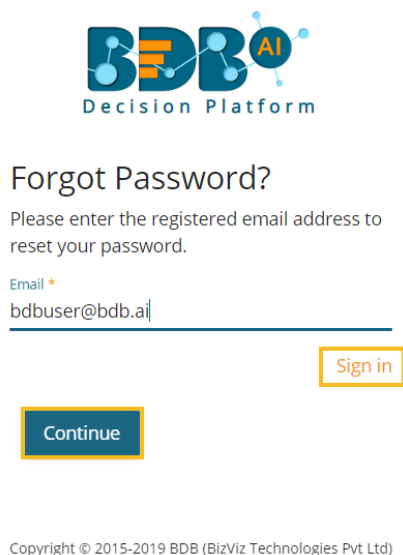
Users are provided with a choice to change the password on the Login page of the platform.

- i) Navigate to the Login page.
- ii) Click the **'Forgot Password?'** option.

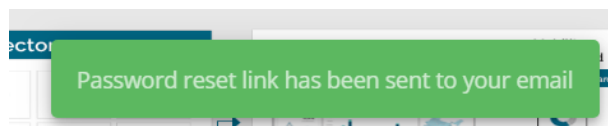


- iii) A new window opens.
- iv) Provide the email id that is registered with BDB to send the reset password link.

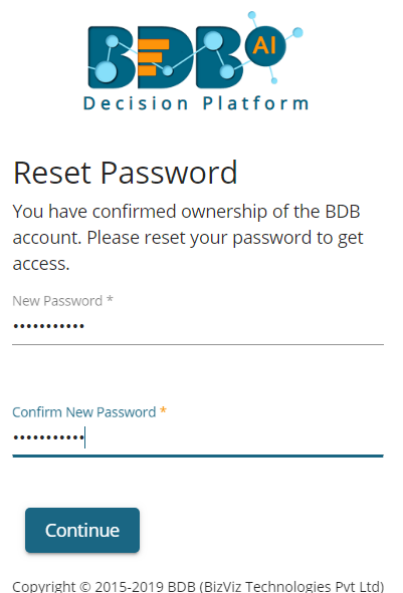
- v) Click the **'Continue'** option.



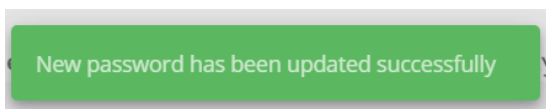
- vi) Users may be redirected to select a space in case of multiple spaces under one server link( They need to select a space and click the **'Continue'** option once again). If users do not have multiple spaces then, a message appears to notify the user about the password reset link (The users receive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



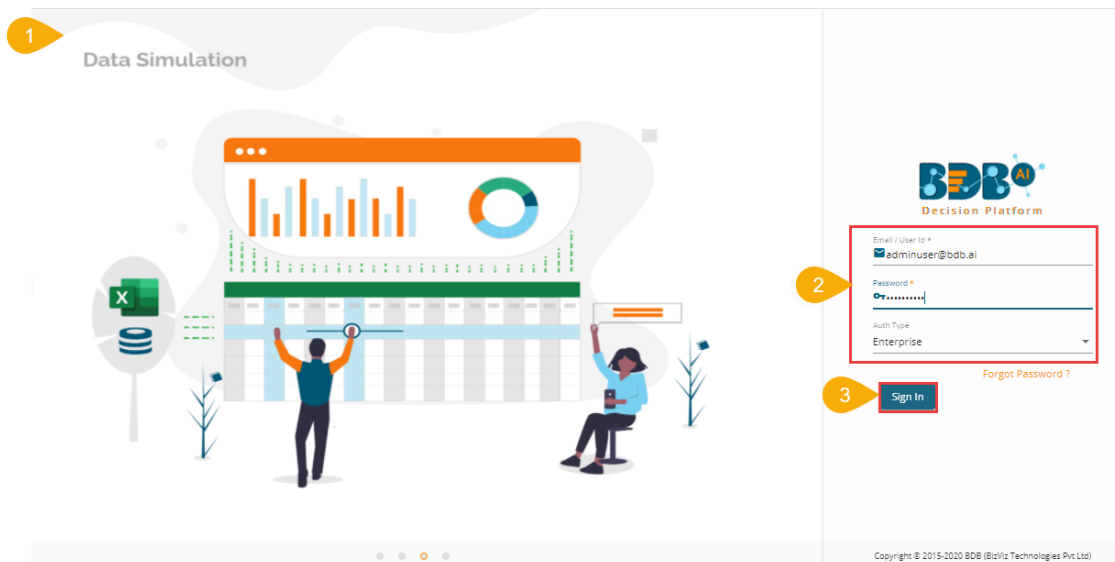
- xii) The password for the selected BDB account gets reset, and the user receives a notification to assure them.



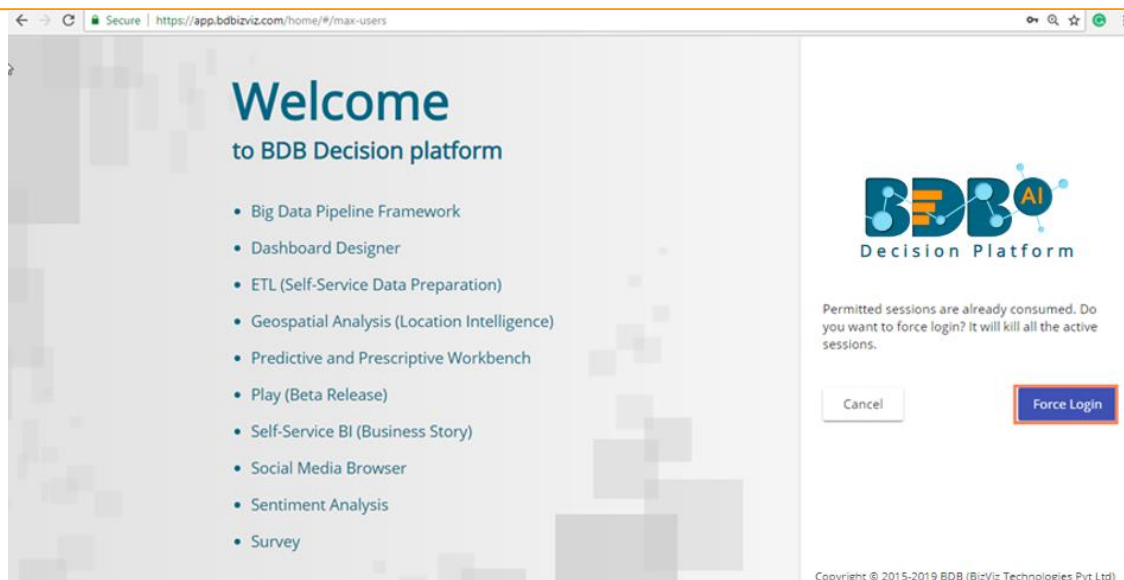
## 12.4. Force Login

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.