SurveyBuz User Manual

Version: 1.0

Table of Contents

1. Overview

SurveyBuz is a simple and easy-to-use business tool to quickly roll out surveys and gather user responses without any manual intervention. Users can be restricted to respond just once, and the survey administrator/user can view the statistics of completed surveys.

SurveyBuz is developed as a SharePoint hosted add-in that can be easily added to any site from the SharePoint App Store.

Any member of the Survey Administrator group can create a survey with the following information:

- Motion Theme

- Start Date

- End Date

- Participant Weightage

The survey administrator can design a ballot with questions and answer choices and also add participants to the survey with custom weightage. Once the survey is published, the survey administrator has the option to start the survey upon arrival of the start date. (This can be automated using a scheduler.) Participants can view all the surveys that he/she is a part of and can respond to them.

When the end date is reached, the survey administrator has the option to close the survey. (This can be automated using a scheduler.) Once the survey is closed, survey results will be calculated based on each participant's weightage and the response selected to generate reports.

2. SurveyBuz Add-in Setup

When SurveyBuz is installed from SharePoint Store, it will be added automatically to Site Contents.

To start using the SurveyBuz add-in, create the **Survey Administrator** group with full permission in the host site and add users to this group manually.

If the app web (where the add-in is deployed) inherits permissions from the host site (where the add-in is installed), add permissions for the survey administrator group and participants in the host site. It will

be replicated in app web site. If the app web has unique permissions not inherited from the host site, then add permissions for the survey administrator group and participants in app web user permission page (*/_layouts/15/user.aspx*).

Participants must have at least read permission in the site. Survey administrators should be added with 'Full Control' or 'Manage List and Permissions' access.

3. Lists

Surveys and Survey_Participants lists are maintained in app website and it is used to store the details of surveys and participants. Survey administrator has full access to these lists while other users have only read permission.

4. SurveyBuz Add-in Usage

4.1. Home Page

SurveyBuz page shows all the surveys to participate for a logged-in user.

If the logged-in user is a survey administrator, the page also lists all the surveys to be managed. Survey administrator has additional privileges to add surveys, add participants with their weightage, add questions with choices, publish surveys, cancel/start/close/delete surveys, and view the current response trend of a survey.

If the Survey Administrator group is not created on the host site, SurveyBuz home page prompts the user to create one before proceeding. Launching the add-in after creating the Survey Administrator group takes the user to the respective home page screen. For an administrator, this includes the 'All Surveys' and 'My Surveys' sections. The 'My Surveys' section is visible to all users and lists all the open surveys they are required to participate.

Survey Administrator's View

SurveyBuz

Help

⊕ Add New Survey

All Surveys

Title	Motion Theme	Start Date	End Date	Created By	Created	Action	Participants	Questions	Start Survey	Close Survey	Result	Delete Survey
⌐ **Survey Status : InDesign** (1)												
Product Feedback	To get feedback about the product	16-11-2017 11:40	16-11-2017 11:45	☐ Lincy s	7 minutes ago	Publish | Cancel	Add Participants	Manage Questions	N/A	N/A	N/A	Delete

Display all surveys created by Survey Administrator and will be available only for Administrators to manage the surveys.

My Surveys

There are no surveys available for participation.

Display all surveys that have logged-in user as participant.

Survey Participant's View

SurveyBuz

Help

My Surveys

Survey Name	Motion Theme	Start Date	End Date	Status	Result
Product Feedback	To get feedback about the product	16-11-2017 11:40	16-11-2017 11:45	Open	N/A

Display all surveys that have logged-in user as participant.

4.2. New Survey

Survey administrator can create a new survey with survey name, motion theme, start and end date details by clicking on **Add New Survey** in home page. Start date and end date validations are based on the time zone set in the host site.

When creating a new survey, its status will be 'InDesign' initially, and once questions and participants are added, the survey can be published.

Add New Survey

SurveyBuz

Add Survey

Survey Name *	Product Feedback
Motion Theme *	To get feedback about the product
Start Date *	16-11-2017 11: ▾ 40 ▾
End Date *	16-11-2017 11: ▾ 45 ▾

Save   Cancel
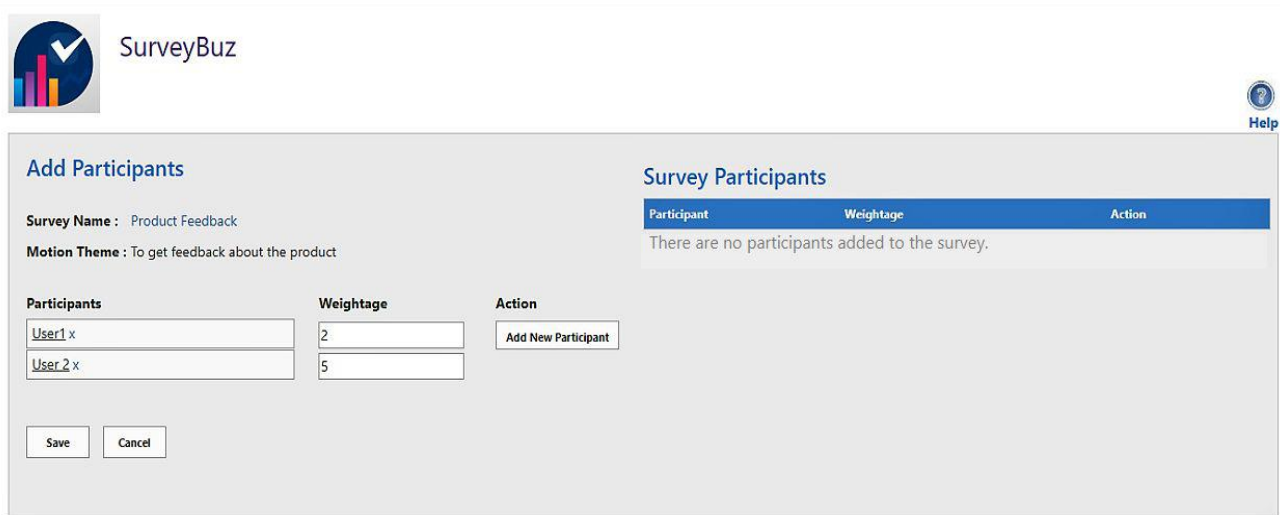
Clicking on save button sends the user to **Add Participants** page, where survey administrator can add all participants with their respective weightage.

4.3. Add Participants

Survey administrator can add multiple survey participants with weightage. Survey Participants section on this page lists all the participants that are added to the survey along with the option to remove participants. Add Participants link will be enabled in the home page until the start of the survey.

Clicking on save, the user will be redirected to **Manage Questions** page, where the survey administrator can add questions to the survey.

<div align="center">

Add Participants

</div>

4.4. Manage Questions

In the Manage Questions page, Survey Administrator can add, modify, or delete a question. Click on **Add Question**, and the survey administrator can add the question and its choices. SurveyBuz supports only multiple choice type questions. Yes/No questions can be entered as choice on a separate line.

Manage Questions page lists all the questions that are added to the survey with an option to view, edit, or delete questions. If the survey is published, the administrator cannot edit or delete the question.

If the survey status is 'InDesign', survey administrator has the option (in home page) to add questions to the survey.

4.5. Edit Survey

Survey administrator can edit the survey theme, start date, and end date by clicking on survey name in 'All Surveys' View. Survey details can be modified only when the survey is in 'InDesign' or 'Published' status.

4.6. Delete Survey

Survey Administrator can delete the survey only if the survey status is 'InDesign', 'Published' or 'Cancelled'.

4.7. Publish Survey

Once the survey design is completed, survey administrator can publish the survey. Home page will show the option to start the survey once the start date is reached.

Publish Survey

4.8. Start Survey

Once the survey reaches the start date, **Start** link is enabled and survey administrator can start the survey. The add-in checks the start date based on the time zone set in the host site.

When the survey is started, its status changes to 'Open' and permission is set for participants of the corresponding survey. Email notification will be sent to all participants when the survey starts.

Start Survey

4.9. Cancel Survey

A survey can be cancelled only if the survey status is 'InDesign', 'Published' or 'Open'. Cancelling a survey removes the corresponding survey permissions for participants and changes the survey status to 'Cancelled'.

Cancel Survey

4.10. Respond to the Survey

When a normal user logs in, he/she can see all surveys with status set to 'Open' as well as 'Closed'.

Upon clicking on the **Survey Name** of an open survey, the user can navigate to the survey page, where he/she can respond to the survey. **View Results** option for closed surveys lets users see the reports of the survey.

<p align="center">Participants View</p>

Survey - Product Feedback

Survey Name: Product Feedback

Motion Theme: To get feedback about the product

1. How long have you been using our product? *

   ○ Less than 1 month
   ○ 1-12 months
   ○ 1-3 years
   ○ Never used

2. How satisfied are you with the product? *

   ○ Very satisfied
   ○ Satisfied
   ○ Neutral
   ○ Unsatisfied
   ○ Very Unsatisfied

3. How often do you use the product? *

   ○ Once a week
   ○ 2 or 3 times a month
   ○ Once a month

   [Finish]   [Cancel]

4.11. Survey Response Trend

Survey administrator has the privilege to view the survey response trend percentage for the survey when the survey is open to participants.

4.12. Close Survey

Once the survey reaches the end date, **Close** link is enabled in the home page to close the survey. The add-in compares the end date with the time zone set in the host site.

Once the survey is closed, system changes the permission to prevent participants from responding and calculates the total based on each participant's weightage and response to the survey.
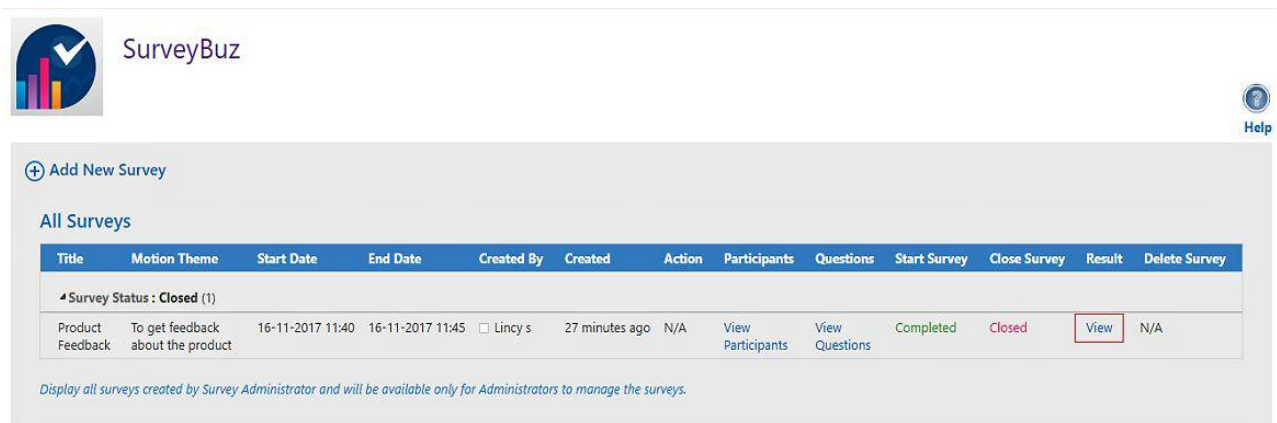
Close Survey

4.13. Survey Results

View Result link is visible for all closed surveys. This takes the user to the survey result page, which shows the survey details and response status of the survey.

System also shows the total for each question and choices of the survey in tabular format. It generates charts for each question and shows pie charts for all multiple choice questions and bar charts for all yes/no questions.

Charts also give 'Not Responded' values, which show how many participants have not responded to the surveys.

<div align="center">

View Result

</div>

Survey Result

SurveyBuz

Help

Survey Result

Survey Name:	Product Feedback
Motion Theme:	To get feedback about the product
Start Date:	16-11-2017 11:40
End Date:	16-11-2017 11:45
Response status:	All the participants have responded

Participants
- **User 2 - Responded**
- **User1 - Responded**

Result Summary	
1. How long have you been using our product?	
Less than 1 month	0
1-12 months	2
1-3 years	5
Never used	0
2. How satisfied are you with the product?	
Very satisfied	5
Satisfied	2
Neutral	0
Unsatisfied	0
Very Unsatisfied	0
3. How often do you use the product?	
Once a week	7
2 or 3 times a month	0
Once a month	0
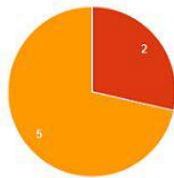
How long have you been using our product?
- Less than 1 month - 0
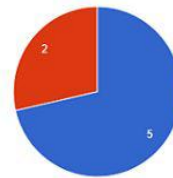- 1-12 months - 2
- 1-3 years - 5
- Never used - 0
- Not Responded - 0

How satisfied are you with the product?
- Very satisfied - 5
- Satisfied - 2
- Neutral - 0
- Unsatisfied - 0
- Very Unsatisfied - 0
- Not Responded - 0

How often do you use the product?
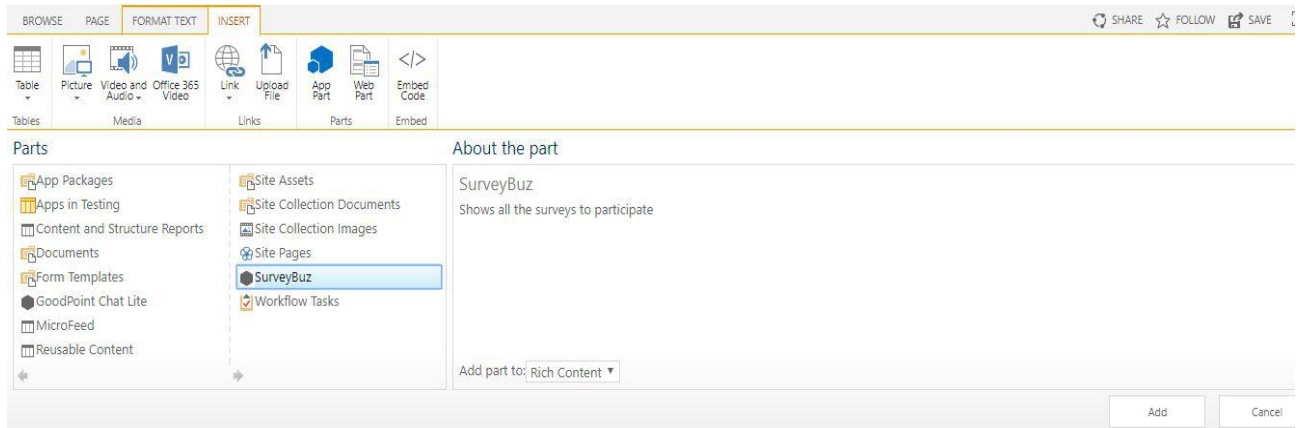- Once a week - 7
- 2 or 3 times a month - 0
- Once a month - 0
- Not Responded - 0

SurveyBuz User Manual

5. Integrate SurveyBuz in Pages

Go to any site page, click edit the page and insert App Part. SurveyBuz Add-in is shown in the list and it can be added in the site page as an App Part.

SurveyBuz App Part lists only those surveys with 'Open' and 'Closed' status to the logged-in user.

Displays All Surveys for the Participants in App Part

6. Configure Automatic Start and Close of Surveys Using Schedulers

QBurst has developed an executable program, which automatically starts the surveys once the survey start date is reached and closes it once the end date is reached. This executable file can be configured in the Windows Task Scheduler. To get the executable program, contact us at info@qburst.com.