

BlueX Onboarding Learning Webinar

14th October 2020

Hosted By: Dave Sykes

Agenda

- Welcome to BlueX
- Creating a survey
- Build your Email campaign
- Publish to go live
- Any questions



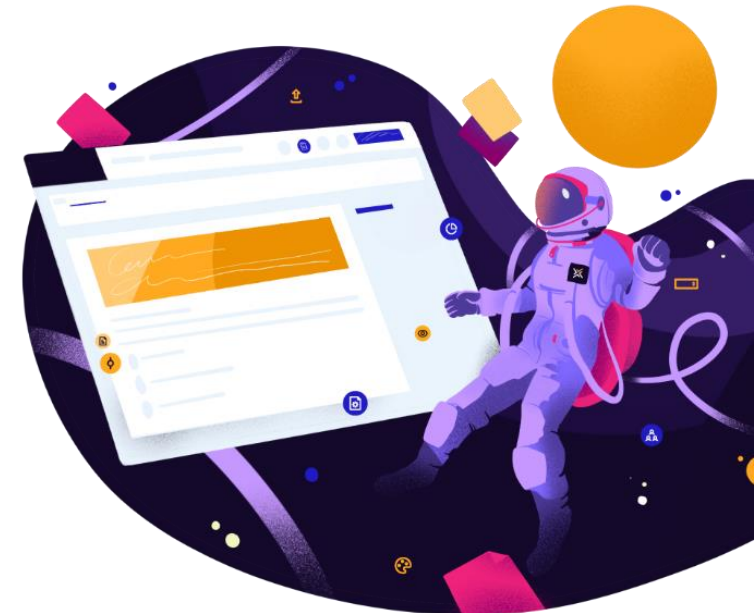
Welcome to BlueX

BlueX, an online survey solution that helps you to easily build rich and engaging questionnaires, newsletters, Forms and more. With an intuitive user-friendly interface, creating, monitoring and managing your surveys is simple.

“Your creativity is your only real limit”

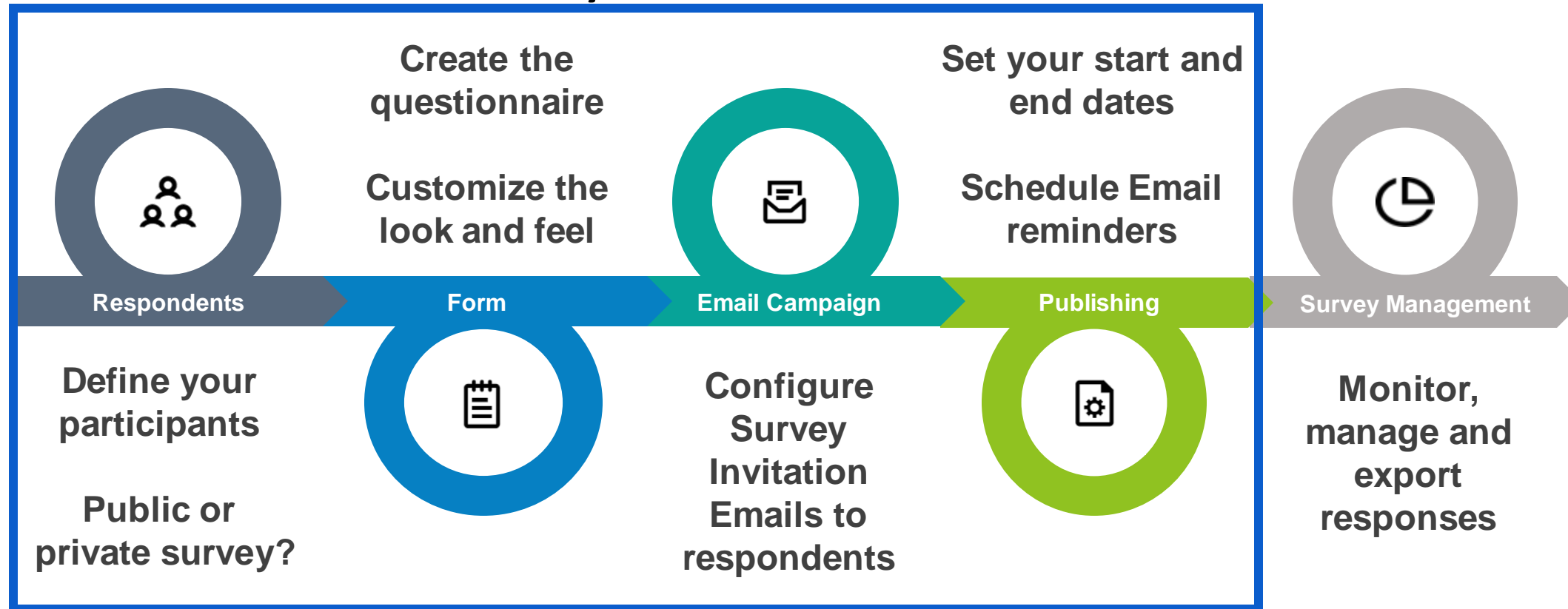
Highlight features:

- Free-form editor
- 20+ question types
- 20 Predefined templates and themes
- Advanced Question logic
- Version control
- Survey Management features
- Customizable export



BlueX Survey Journey

Today's Session



Creating a Survey

What is coming in BlueX Release 1.6

Embed a question in email campaign:

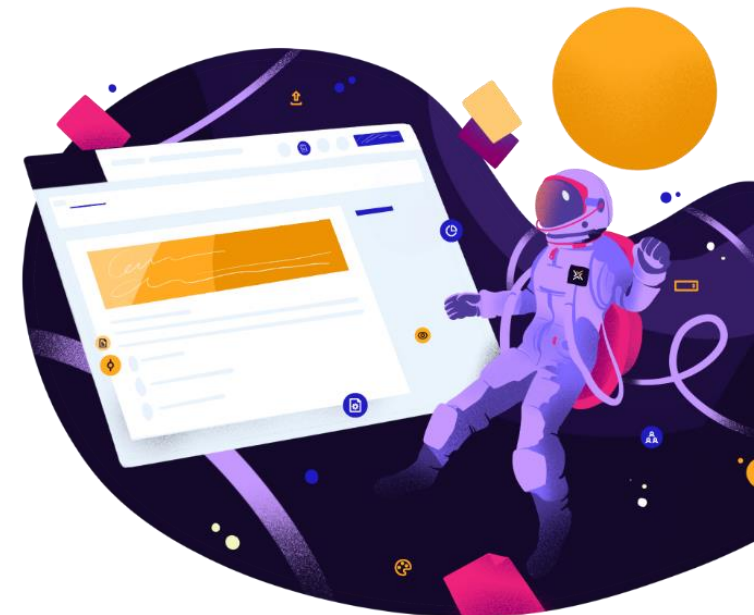
Attract respondents to open the survey questionnaire by embedding one of your survey questions in your invitation, reminder, or final reminder email. Answering the question in email will result in the question get answered in the questionnaire.

Export email center data:

Export the status timestamp data of each sent out email, Excel and CSV are the available formats. You can directly export a filtered result based on your needs.

Thank you for attending

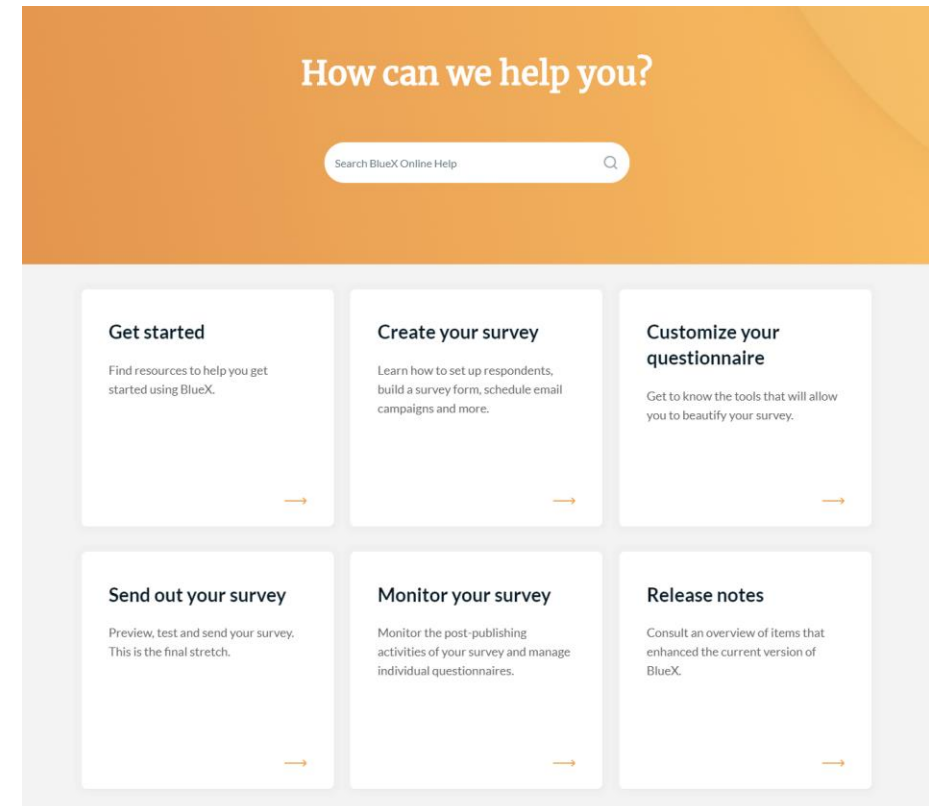
Any questions?



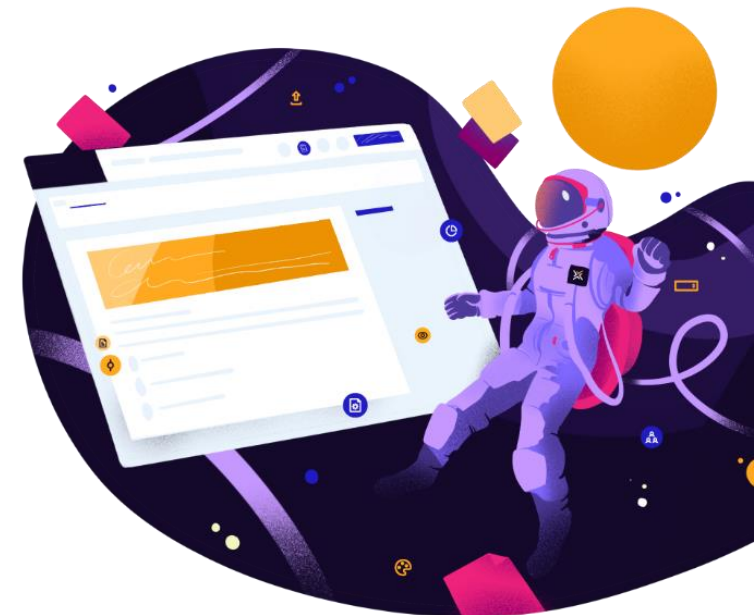


Recourses for Support

- Help guides
- Tutorial videos
- Full user guide
- Release notes



BlueX Interface Reference Guides



Create, Publish, Monitor & Export

Create the survey - Core to your BlueX experience, translate your feedback needs into a survey. The process normally involves the following steps:

- Select your respondents
- Build the questionnaire
- Customize the look and feel of your questionnaire
- Configure emails sent to respondents
- Publish your survey

Monitor, report, and manage the survey - When a survey is successfully published, the real journey is just beginning.

- Monitor real-time statistics
- Manage individual respondent questionnaires
- Export and download responses

Navigation



Respondents: participants of a private survey.



Form: questionnaire and thank you page.



Email campaign: edit the email message.



Publishing: how to distribute the survey,

Respondents

There are two kinds of surveys: **Private surveys** and **Public surveys**.

Private Survey:

In a private survey, data is collected from a specific group of people, defined by the survey creator. A respondent file is required to be uploaded.

Public Survey:

In a public survey, data is collected from an anonymous audience and general public. Anyone with the link can fill out the survey.

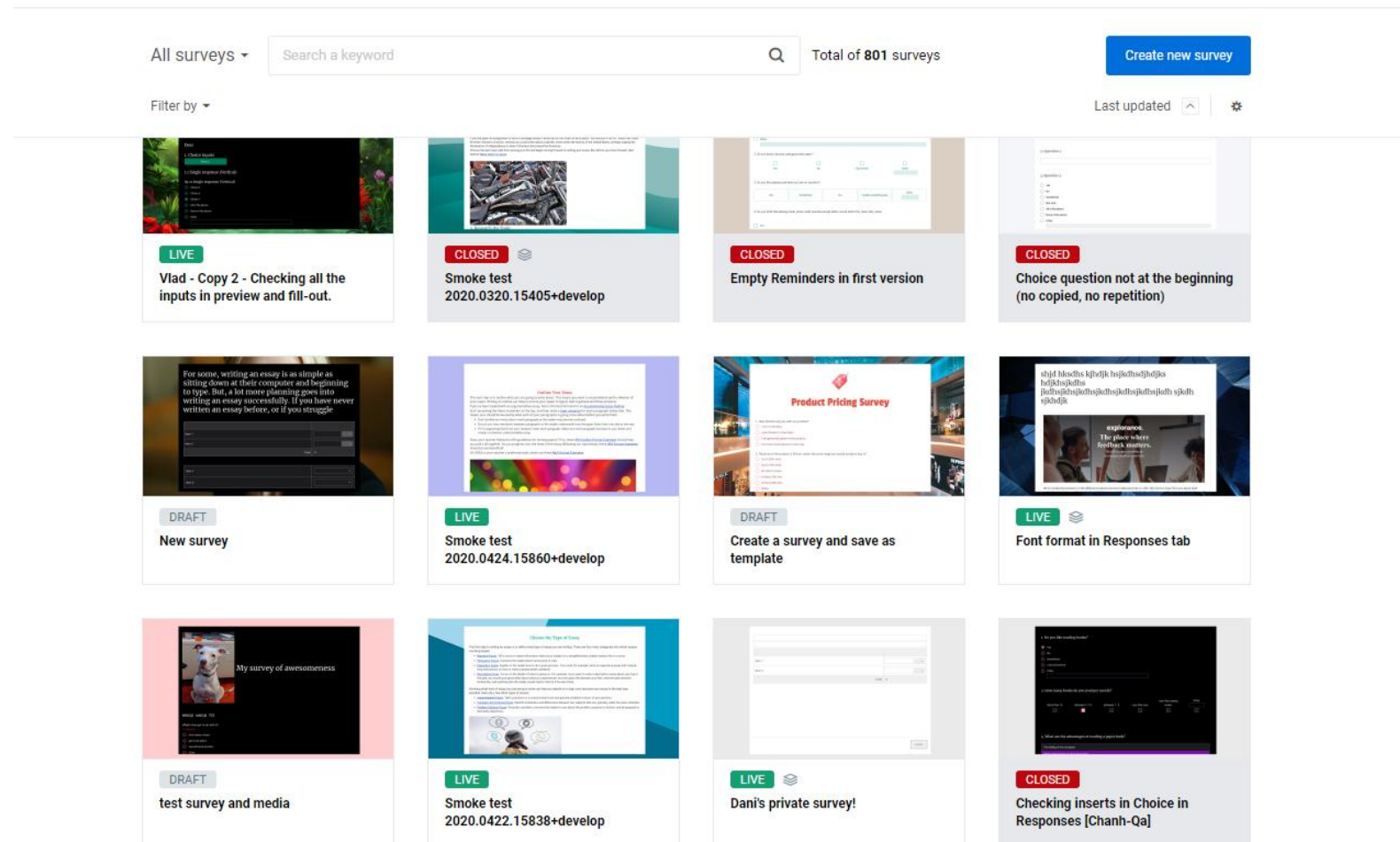
Feature: Go to Survey List

Quick access to:

- Respondents
- Form
- Email Campaign
- Survey Management

You can Also:

- Duplicate a Survey
- Preview a Survey
- Delete a Survey



The screenshot displays the 'Go to Survey List' interface. At the top, there's a header with 'All surveys' and a search bar containing 'Search a keyword'. To the right, it says 'Total of 801 surveys' and a 'Create new survey' button. Below the header, there's a 'Filter by' dropdown and a 'Last updated' section with a dropdown arrow and a star icon. The main area shows a grid of 12 survey cards. Each card features a thumbnail image, a status label (LIVE, CLOSED, or DRAFT), a title, and a unique ID. The surveys include:

- Vlad - Copy 2**: Checking all the inputs in preview and fill-out. (LIVE)
- Smoke test**: 2020.0320.15405+develop. (CLOSED)
- Empty Reminders**: in first version. (CLOSED)
- Choice question**: not at the beginning (no copied, no repetition). (CLOSED)
- New survey**: (DRAFT)
- Smoke test**: 2020.0424.15860+develop. (LIVE)
- Create a survey and save as template**: (DRAFT)
- Font format in Responses tab**: (LIVE)
- test survey and media**: (DRAFT)
- Smoke test**: 2020.0422.15838+develop. (LIVE)
- Dani's private survey!**: (LIVE)
- Checking inserts in Choice in Responses [Chanh-Qa]**: (CLOSED)

Feature: Fonts, Styles and Paragraphs

Form Main page Thank you page

Font Font Family 11 B <i>I</i> <u>U</u> Aa										Styles and paragraph Normal [List Icon] [List Icon] [List Icon]			Insert [Link Icon]	Edit [Undo Icon] [Redo Icon]		Preview [Preview Icon]
Question [List Icon] [Text Icon] # [Table Icon] [Image Icon] Σ \updownarrow [Cloud Icon]				Structure [Table Icon] [Table Icon] [Table Icon] [Table Icon]			Logic [Eye Icon] [Eye Icon] [X Icon] [Table Icon] [Table Icon] [Key Icon] A B				Variable (x)	Binding [Gear Icon]				

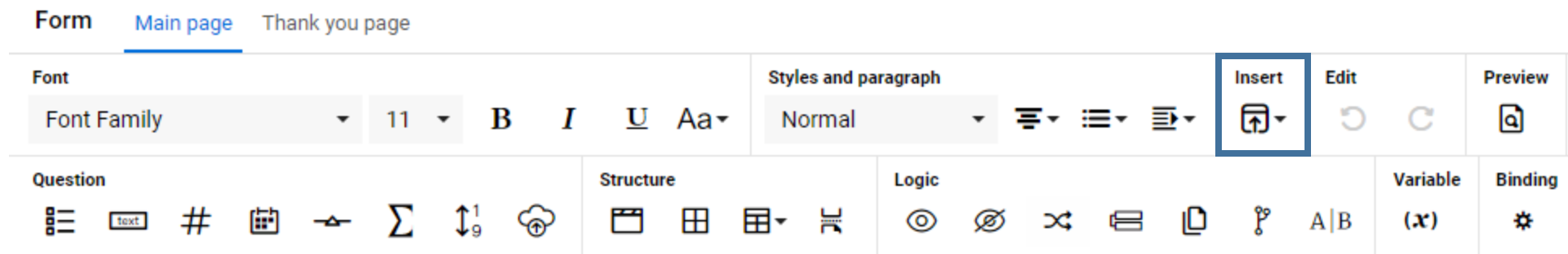
Font:

Text can be formatted like you would in most text editors. A toolbar with standard options, such as Bold, Font family, and font size are made available in the main page toolbar.

Styles and Paragraphs:





Heading is used as the title at the beginning of pages or sections, it demonstrates the topic of the content underneath. Headings are also important for building a table of contents.

Feature: Insert



Insert:

The Insert tool allows you to add different types of media.

ICON	ACTION	DESCRIPTION
	Link	Create a URL link in your document to quickly access a new web page.
	Image	Insert an image from your computer or another source.
	Video	Embed an online video in your survey form.
	File	Insert a file from your computer or another source.

Feature: Edit & Preview

Form Main page Thank you page

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Question [list icon] [text icon] # [table icon] [checkbox icon] Σ [math icon] [cloud icon]				Structure [panel icon] [table icon] [table icon] [table icon]				Logic [eye icon] [eye with slash icon] [crossed out icon] [document icon] [key icon] A B				Variable (x)		Binding [gear icon]	

Edit:



















- Allows you to undo and redo any changes you have made

Preview:









- Review content in its final format
- Complete the survey as a respondent
- Verify how the form adapts to different devices (i.e. desktop, tablet, or mobile)
- Test the logic actions and conditions you configured
- Review emails in HTML or plain text

Feature: Question

Form Main page Thank you page

Font		Styles and paragraph			Insert	Edit	Preview			
Font Family	11	B	I	U	Aa	Normal				
Question				Structure		Logic		Variable	Binding	
       				   		     		A B	(x)	⚙️

Within in BlueX there are close-ended questions like the choice question which provide a choice of available responses, and open-ended questions like the comment question, which give respondents the flexibility to create their own responses and share their thoughts.

ICON	ACTION	DESCRIPTION
	Choice	Multiple choice, check box selection, yes/ no, true/ false, Image choice question, etc. You can achieve any of these question types with choice question. As long as you require the respondent to choose one or more answers from a list.
	Comment	Open ended question, respondents have one or more rows to enter free-form text as response.
	Numeric	Responses are numerical. BlueX allows slider and spin box layout for picking numbers; integer, decimal, currency, or other number types. You can also set up a validation rule for example the maximum and minimum.
	Date or time	Responses are dates. Date question, time question, date and time question. You can define the format of the answer.
	Scale	Respondents are asked to pick the most appropriate option from a defined scale. Likert scale with prepopulated options or not.
	Constant sum	Respondents are asked to distribute numeric values for a set of items. The values are either summed up or counted down.
	Ranking	Respondents are asked to compare a set of items and give an order based on importance or another metric. Items can be ranked by number or text. This question can be used for ranking, voting, rating and so on.
	Media Response	Respondents are asked to respond by uploading a document, an image, an audio clip or a video.





Feature: Structure

Form Main page Thank you page

Font Font Family ▾ 11 ▾ B <i>I</i> <u>U</u> Aa ▾				Styles and paragraph Normal ▾ [align icons] [list icons] [indent icon]			Insert [link icon]	Edit [undo icon] [redo icon]	Preview [preview icon]
Question [list icon] [text icon] # [table icon] [checkbox icon] Σ [math icon] [arrow icon] [cloud icon]				Structure [tab icon] [grid icon] [table icon] [page break icon]		Logic [eye icon] [no eye icon] [xor icon] [if/then icon] [copy icon] [key icon] A B		Variable (x)	Binding [gear icon]

Custom area with a fork logic is the best combination to direct survey flows. While, custom grid can save you time and effort creating list of questions that uses the same question type.

A Page break can make your survey form appear more concise and organized.

ICON	ACTION	DESCRIPTION
	Custom Area	A custom area will provide multiple tabs that can display different versions of survey content.
	Custom Grid	A custom grid is a section you can add in the form that can be used as a normal table or as a question grid.
	Grid Style	Enables you to insert or remove columns or rows within a selected custom grid.
	Page Break	A page break is used to end the current page and start the next one.

Feature: Logic

Form Main page Thank you page

Font Font Family ▾ 11 ▾ B <i>I</i> <u>U</u> Aa ▾		Styles and paragraph Normal ▾ [Icons]			Insert [Icon]	Edit [Icons]	Preview [Icon]
Question [Icons]		Structure [Icons]		Logic [Icons] A/B		Variable (x)	Binding [Icon]

Applying logic actions with customized conditions allows you to create personalized and dynamic survey flows for each respondent. This usually results in more precise and specific responses.

ICON	ACTION	DESCRIPTION
	Show	Displays selected elements.
	Hide	Hides selected elements.
	Randomize	Randomizes the order of selected elements.
	Pipe	Replaces selected text with demographicClosed data or with the responses from a previous question.
	Repeat	Repeats the selected elements based on the response to a previous numeric question or multiple choice question.
	Fork	Creates alternate survey paths when used with custom areas.
	A/B testing	Displays different survey content randomly based on what you assign to display and percentage of probability it will appear.

Feature: Variable

Form Main page Thank you page

Font Font Family ▾ 11 ▾ B <i>I</i> <u>U</u> Aa ▾				Styles and paragraph Normal ▾ [align icons] [list icons] [link icon]				Insert [table icon]		Edit [undo icon] [redo icon]		Preview [preview icon]			
Question [list icon] [text icon] # [table icon] [link icon] Σ [arrow icon] [cloud icon]				Structure [table icon] [grid icon] [table icon] [link icon]				Logic [eye icon] [eye with slash icon] [cross icon] [link icon] [document icon] [key icon] A B				Variable (x)		Binding [gear icon]	

Variables can be inserted to the survey form or email campaign message so that you can personalize the text with respondent information. For example, inserting respondent's First name at the beginning of your invitation email message to make the greeting more friendly.

Note: Respondent information is added to your survey when you upload the respondents file when creating a Private survey.

Demographic fields

- ID
- First Name
- Last Name
- Age
- Gender
- Education
- Country

Feature: Binding

Form Main page Thank you page

Font Font Family ▾ 11 ▾ B <i>I</i> <u>U</u> Aa ▾				Styles and paragraph Normal ▾ [align icons] [list icons] [indent icon]				Insert 		Edit 		Preview 			
Question #				Structure 				Logic A B				Variable (x)		Binding 	

Question Title:

Allows you to define a rule that binds questions automatically to the response options.

Language:

Allows you to define what default language is used for displaying response errors and prompts within the form for the respondent. Only English & French supported at this time.

Automatically bind to questions
☒

While inserting questions in a form, use the 1st paragraph before the question as the question title which:

☐ uses the Question Title style

☐ starts with

☐ ends with

Note : Questions in a custom grid are automatically bound to the corresponding cells in the header row and the first column.

[Apply now](#) to this form.

Feature: Email Campaign

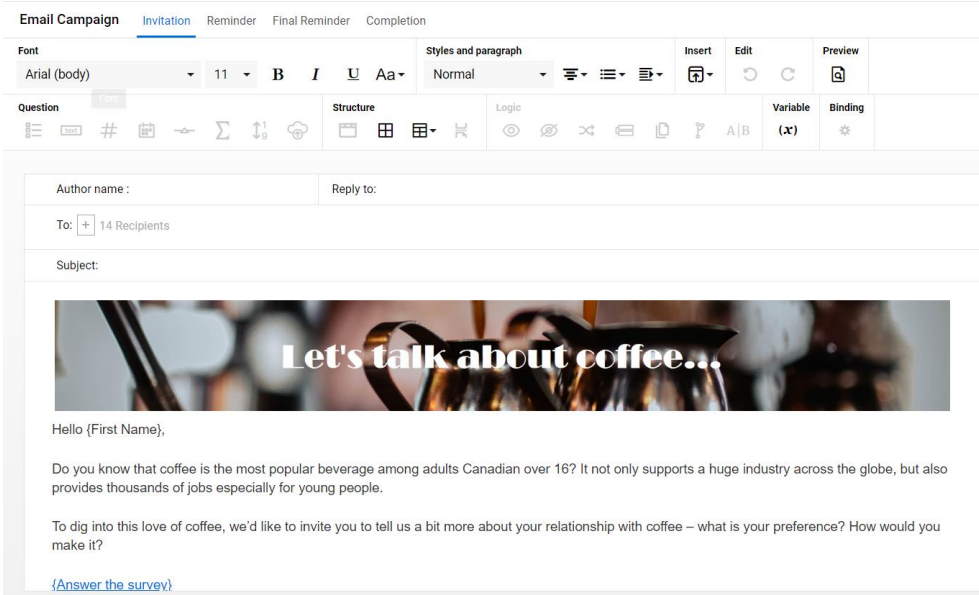
In BlueX, you can use email to distribute your survey to your respondents.

To setup your Email campaign you are required to upload a respondents data file first.

What can I do?

- Create an Invitation Email
- Add various variables from respondents data
- Add survey link
- Create a Reminder Email
- Create a Final reminder Email
- Create a Completion Email

Note: Public surveys will not Support the Email Campaign feature.



Email Campaign Invitation Reminder Final Reminder Completion

Font: Arial (body) 11 B I U Aa Styles and paragraph: Normal Insert Edit Preview

Question: Structure: Logic: Variable: (x) Binding: *

Author name: Reply to:

To: + 14 Recipients

Subject:

Let's talk about coffee...

Hello {First Name},

Do you know that coffee is the most popular beverage among adults Canadian over 16? It not only supports a huge industry across the globe, but also provides thousands of jobs especially for young people.

To dig into this love of coffee, we'd like to invite you to tell us a bit more about your relationship with coffee – what is your preference? How would you make it?

[{Answer the survey}](#)

Publishing your survey

After creating, designing, and testing, your survey is ready to be distributed. You can distribute it with a public link or to a specific group of people with private links.

What can I do?

- Define the Distribution type (public or private survey)
- Setup start and end dates for the survey to run
- Schedule the invitation emails
- Setup a reminder email schedule
- View a publishing summary

NOTE: When selecting public survey you will be provided a URL link to distribute to your selected respondents. This link can be found within the Survey Management section.

Distribution type

Public

☐ Allow modify responses after submission

Response collection period

Start:

End:

Email schedule

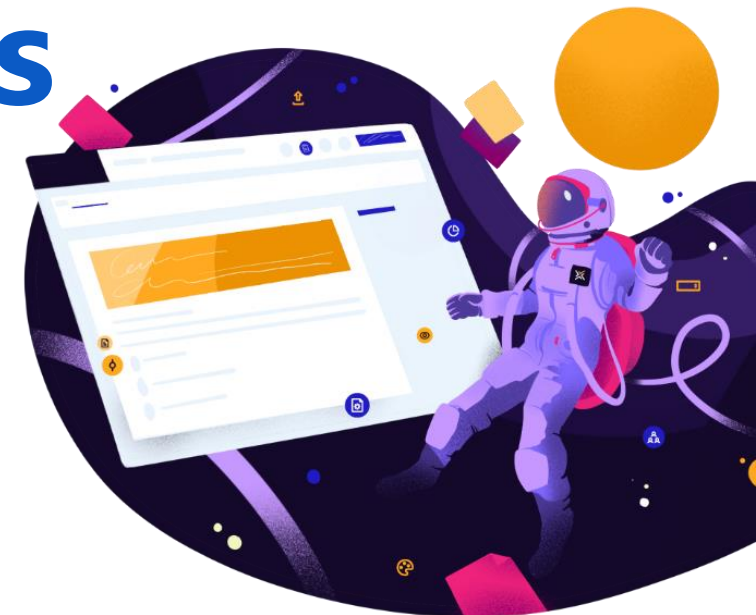
Invitation:

Reminder Add +

Final reminder

Completion Completion emails are not available for public surveys.

Survey Management Reference guides



Monitor & Manage your Surveys

Survey management allows you to oversee everything that is happening in a survey and perform different actions to manage it.

The following sections will help you manage your survey:

Dashboard: Gain insights and detailed statistics of key performance indicators.

Task Management: Individual questionnaires listed in one place for easy management.

Email Center: Check the status of all emails sent in your email campaign.

Responses: Review collected responses categorized by questions.

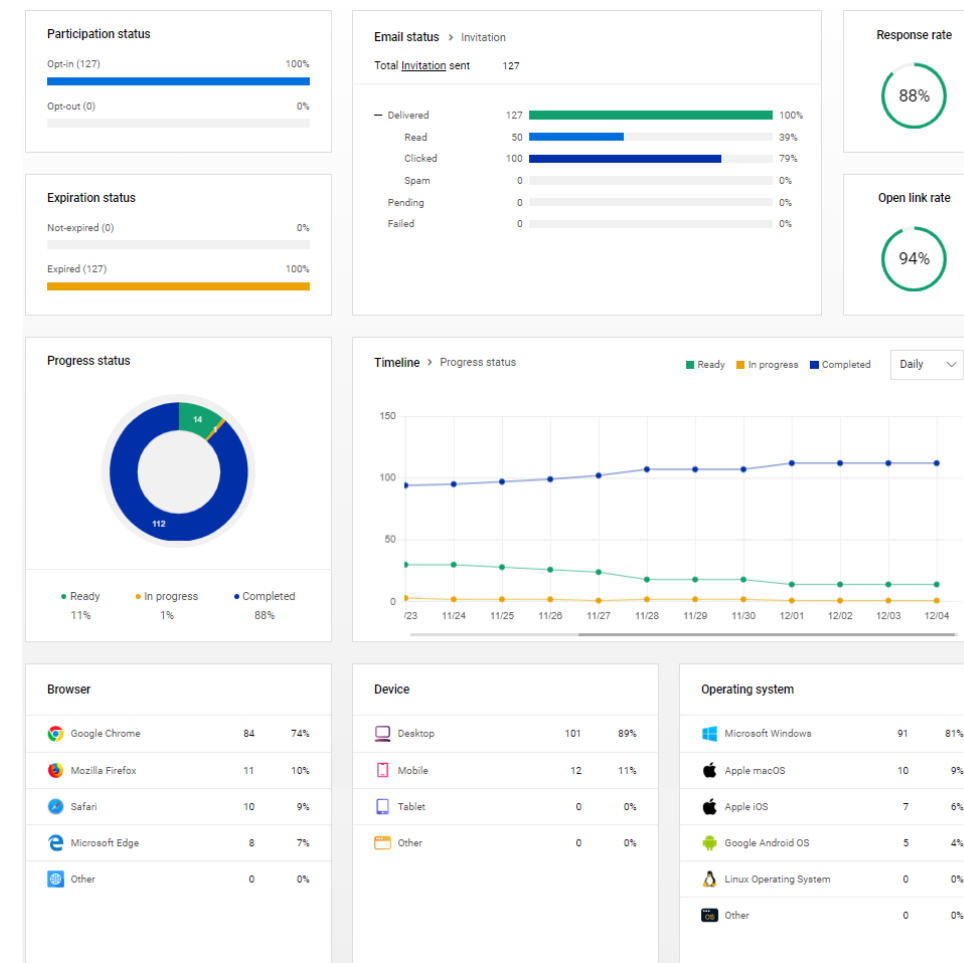
Export History: Download the responses.

Feature: Dashboard

When a survey starts collecting responses, having a dashboard with key performance indicators (KPIs) can help you gain insights on your survey, and understand how the campaign is progressing by seeing real-time graphical data.

What kinds of statistics are available?

- The participation, expiration, progress, and email campaign statuses
- The rate at which surveys are submitted
- The rate at which survey links were opened
- The Timeline of campaign progress
- The breakdown of what browser, OS and device was used to submit a questionnaire



Feature: Task Management

When a private survey is published you will then have access to task management section.

Task management is a centralized location where you can manage tasks individually, or in bulk.

What can I do?

- Check the response progress of the survey participants.
- Reset or Resubmit Survey responses.
- Opt-in or Opt-out participants.
- Send Reminder emails.
- Adjust Survey response dates for individual participants.
- Impersonate an individual participant.

Survey management Dashboard Task management Email center Responses Export history

Quick filters Clear all

Progress status

☐ Ready

☐ In progress

☐ Completed

Participation status

☐ Opt-in

☐ Opt-out

Expiration status

☐ Expired

☐ Not expired

Active tasks Find a task Q Total of 6 tasks

Advanced filters

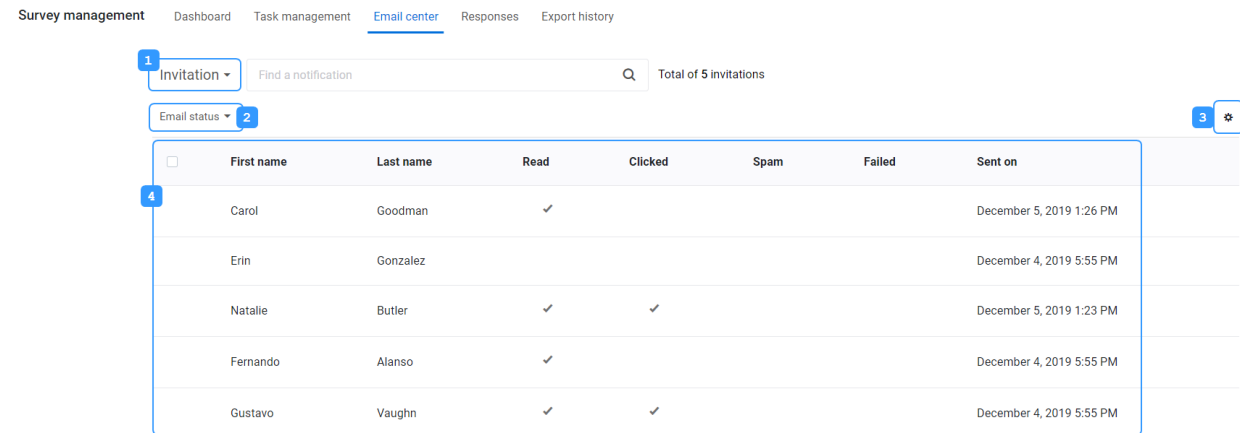
<input type="checkbox"/>	First name	Last name	Progress	Participation	Primary email
<input type="checkbox"/>	Natalie	Butler	Ready	Opt-in	Nbutler@disposable.com
<input type="checkbox"/>	Jean	Bambois	Completed	Opt-in	Jbambois@disposable.com
<input type="checkbox"/>	Gustavo	Vaughn	In progress	Opt-in	Gvaughn@disposable.com
<input type="checkbox"/>	Fernando	Alonso	Ready	Opt-in	Falonso@disposable.com
<input type="checkbox"/>	Erin	Gonzalez	Ready	Opt-in	Egonzalez@disposable.com
<input type="checkbox"/>	Carol	Goodman	Ready	Opt-in	Cgoodman@disposable.com

Note: Task Management is only viewable when running a private survey.

Feature: Email Center

The email center is a centralized space that allows you to monitor the status of any email, and resend emails to respondents when necessary.

- Switch views among different types of emails.
- Filter the list based on the status of the email.
- A fields list to choose what columns you want to see on screen.
- table of emails with their corresponding status and recipient's name.



	First name	Last name	Read	Clicked	Spam	Failed	Sent on
	Carol	Goodman	✓				December 5, 2019 1:26 PM
	Erin	Gonzalez					December 4, 2019 5:55 PM
	Natalie	Butler	✓	✓			December 5, 2019 1:23 PM
	Fernando	Alonso	✓				December 4, 2019 5:55 PM
	Gustavo	Vaughn	✓	✓			December 4, 2019 5:55 PM

THINGS TO KNOW ABOUT RESENDING EMAILS

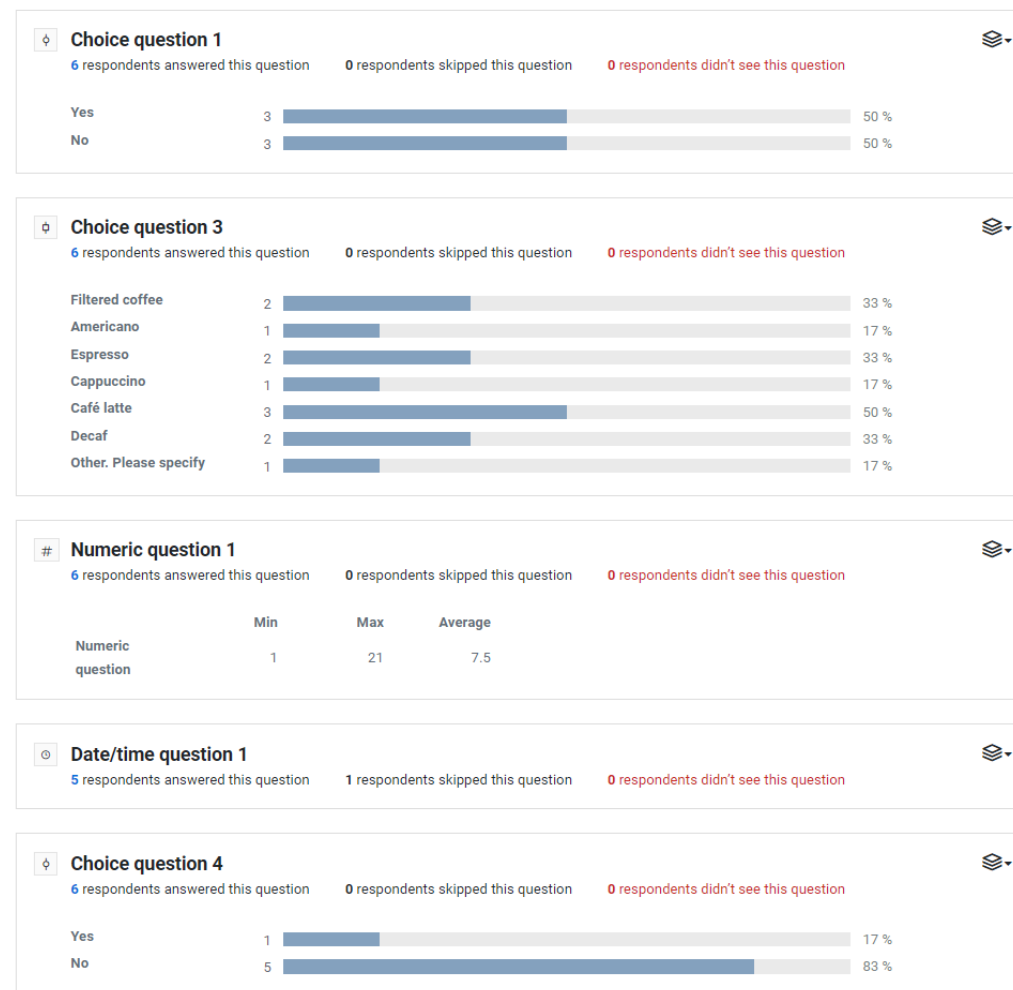
- You can resend any type of email.
- The recipient email address is the only field you can modify when resending an email. If you want to modify the email message, send a manual email instead.
- If the same email is resent multiple times, it will only be counted once in the Dashboard.
- You can select multiple emails on the current page and resend them in bulk.

Feature: Responses

In BlueX, you can visualize the collected responses as graphs, or export raw responses data to download into different formats.

You have different ways to view your responses:

- View Response rate and how many questionnaires have been submitted.
- Total number of questions in the survey form
- Export the responses data to download an offline copy
- Apply filters on the responses data based on the survey version or the respondent
- View Question blocks that include detailed information of questions and responses



Feature: Export History

THINGS TO KNOW ABOUT EXPORT HISTORY

- The Status info in each export tells you if the file has been successfully generated. There are three possible statuses: Generating, Ready to download, and Failed to generate.
- If you encounter a failed export, use the update icon () to retry, or delete the file and repeat the export process.
- The exports in Export history are sorted based on the latest update order.
- Updating the file will not change its filter and variable settings. If you need different settings, go back to the Responses page and process a new export.

Total of 2 generated files
Delete all files

Status : Ready to download.

File name:
20200408T032416.zip

Description:

Updated : 08/04/2020 13:24:16
Created: 08/04/2020 13:24:15

Export format: csv

Version Version 1

Advanced filters (no filters)

Demographic variables ID, First Name, Last Name, Age, Gender, Education, Country, Email, Date

Environment variable Browser, Device, Operating system, IP address

Status : Ready to download.

File name:
20200408T032111.xlsx

Description:

Updated : 08/04/2020 13:21:12
Created: 08/04/2020 13:21:11

Export format: excel

Version Version 2, Version 1

Advanced filters (no filters)

Demographic variables ID, First Name, Last Name, Age, Gender, Education, Country, Email, Date, Status

Environment variable Browser, Device, Operating system, IP address

