

# BlueX Onboarding Learning Webinar

## Monitoring and Manage Responses in BlueX

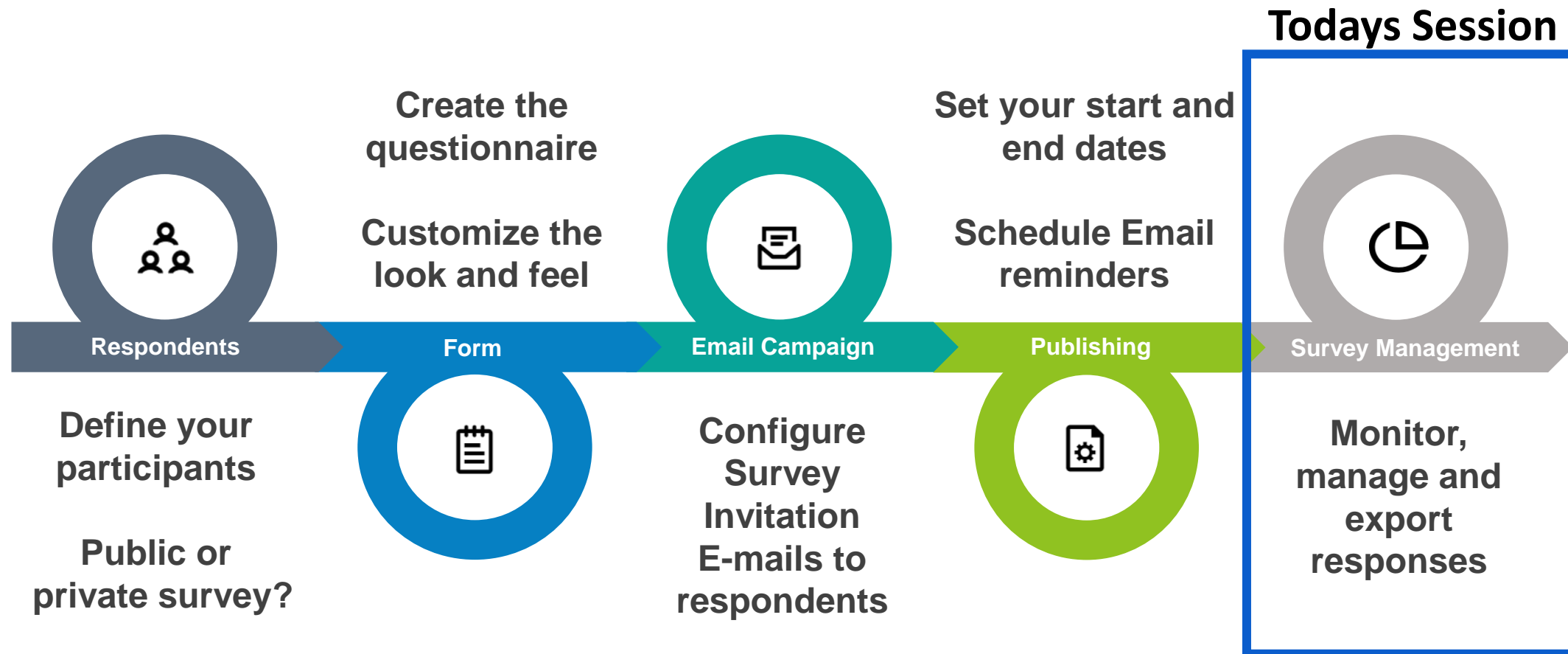
Hosted By: Dave Sykes

# Agenda

- **Monitoring real-time responses**
- **Managing survey tasks**
- **Exporting survey responses**
- **Any questions**

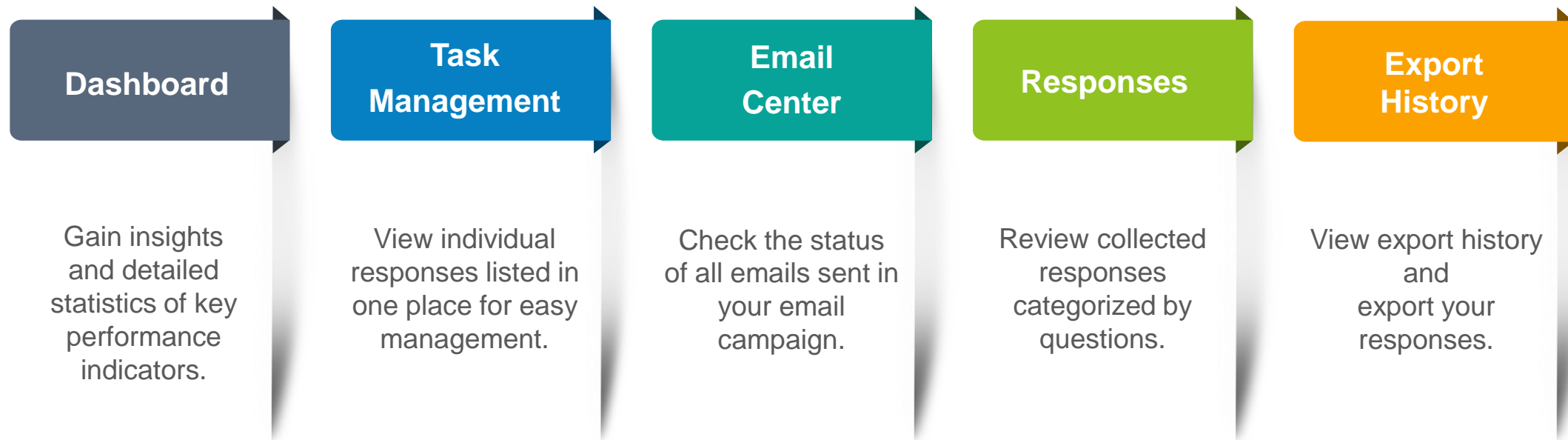


# BlueX Survey Journey

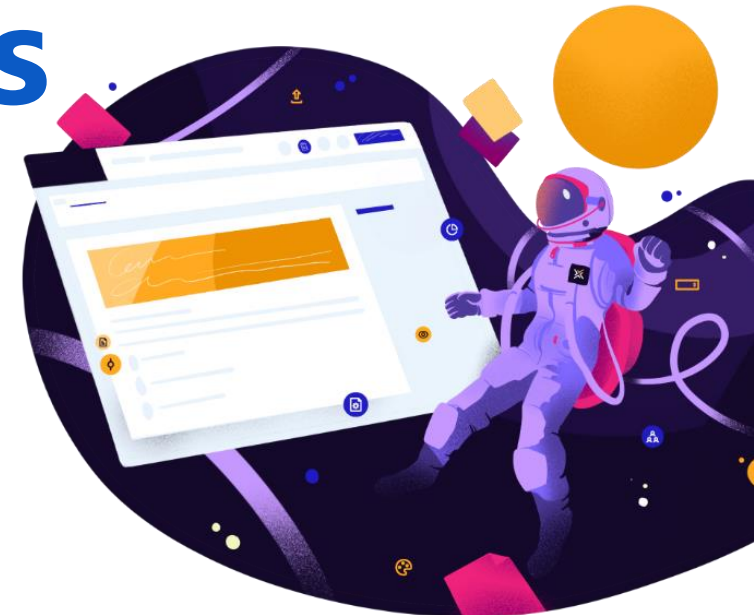


# Survey Management

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

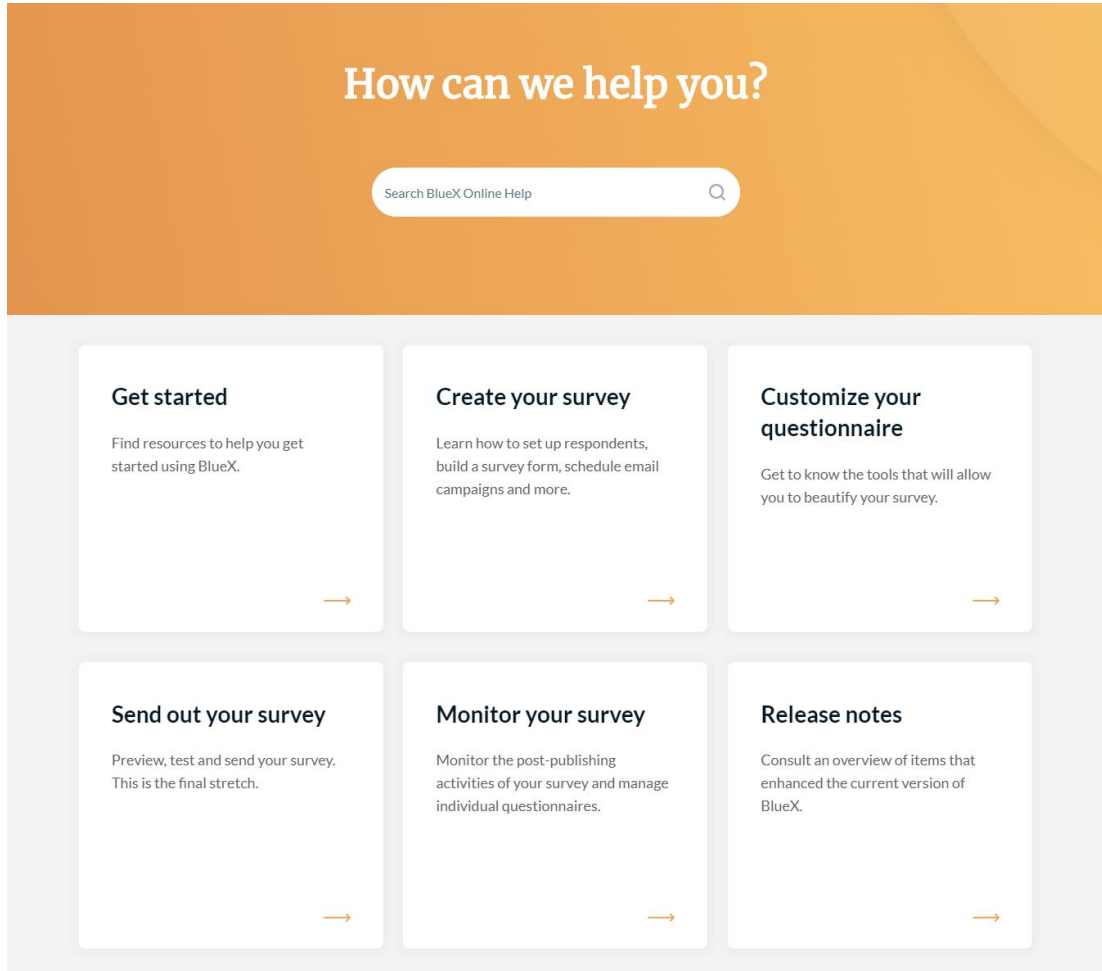


# Monitoring & Managing survey responses



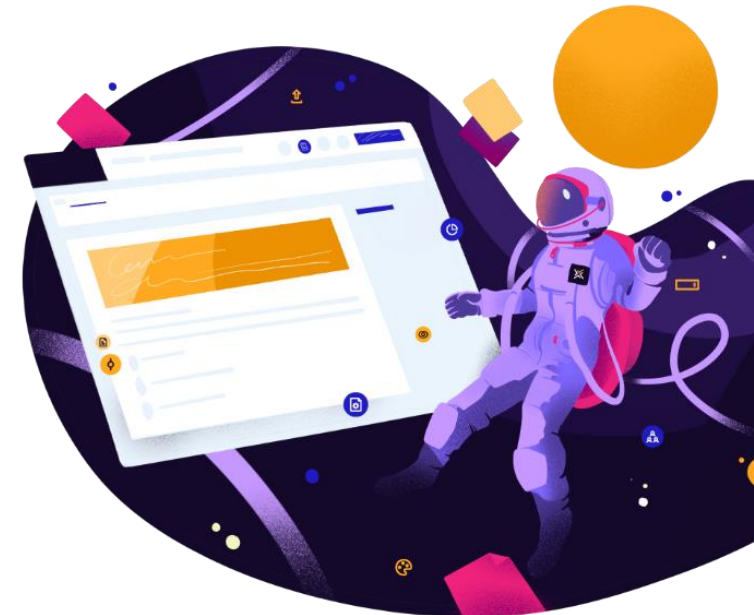
# Recourses for Support

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



The screenshot shows the BlueX Online Help page. At the top, there is a search bar with the text "Search BlueX Online Help" and a magnifying glass icon. Below the search bar, there are six cards arranged in a 2x3 grid, each with a title, a brief description, and a right-pointing arrow. The cards are: "Get started" (Find resources to help you get started using BlueX.), "Create your survey" (Learn how to set up respondents, build a survey form, schedule email campaigns and more.), "Customize your questionnaire" (Get to know the tools that will allow you to beautify your survey.), "Send out your survey" (Preview, test and send your survey. This is the final stretch.), "Monitor your survey" (Monitor the post-publishing activities of your survey and manage individual questionnaires.), and "Release notes" (Consult an overview of items that enhanced the current version of BlueX.).

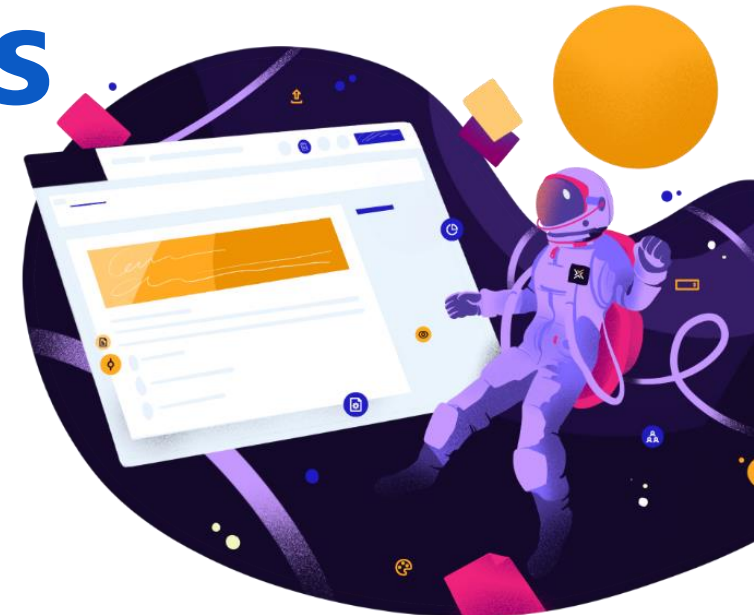
**Thank you for attending**  
**Any questions?**







# 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.

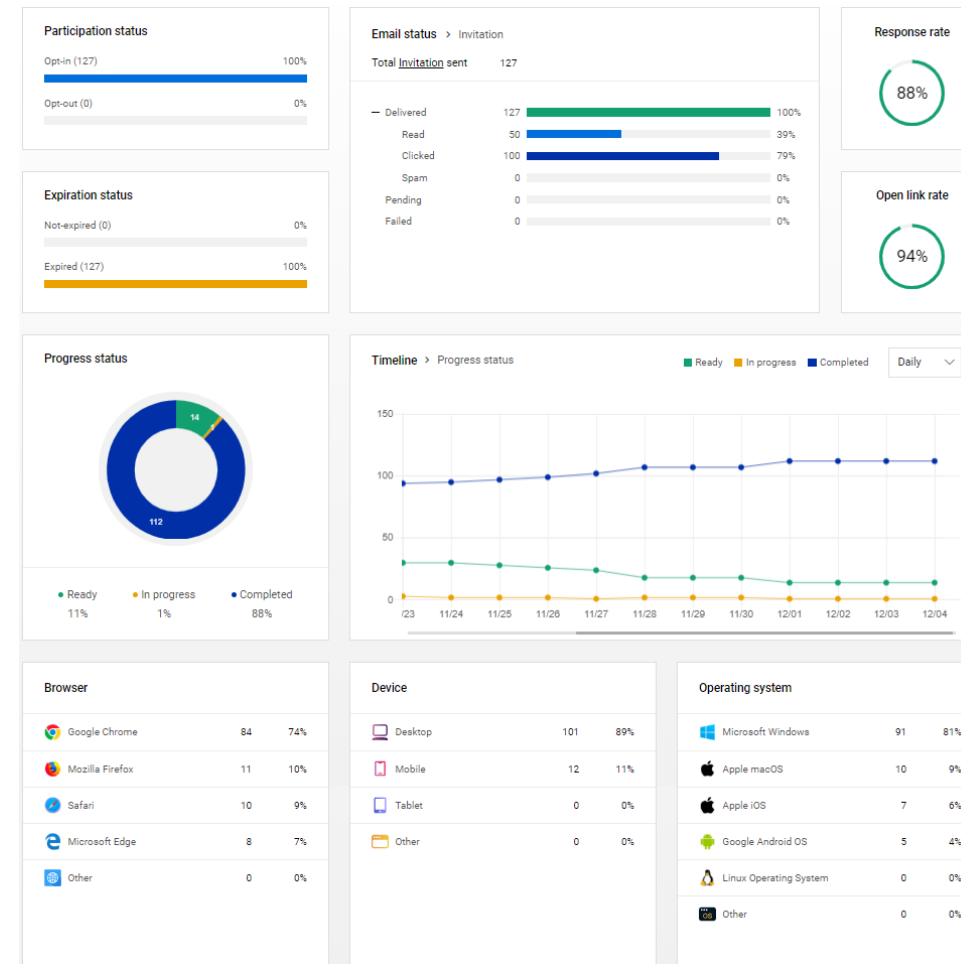
**Export History:** Download the responses.

# 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



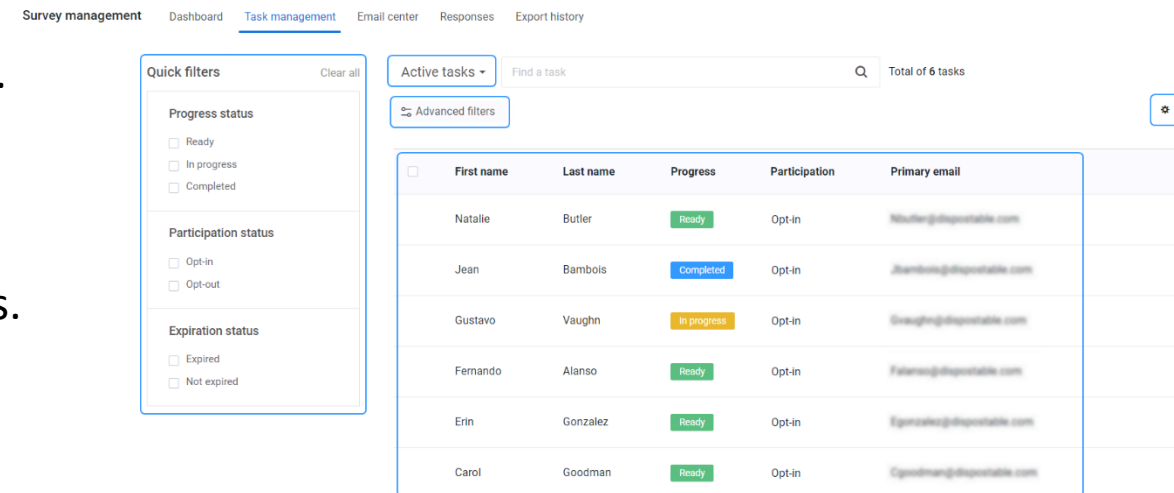
# Feature: Task Management

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.



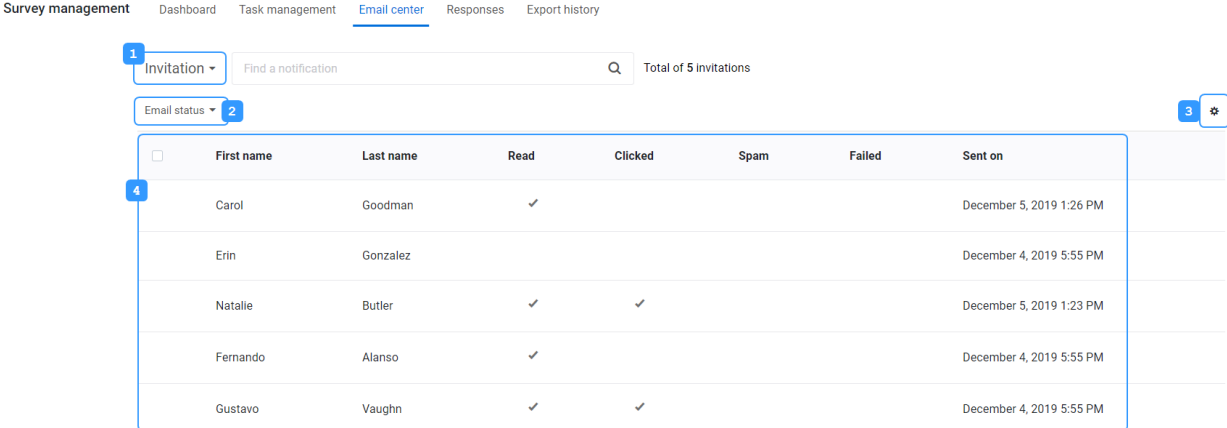
First name	Last name	Progress	Participation	Primary email
Natalie	Butler	Ready	Opt-in	Nbutler@explorance.com
Jean	Bambois	Completed	Opt-in	Jbambois@explorance.com
Gustavo	Vaughn	In progress	Opt-in	Gvaughn@explorance.com
Fernando	Alonso	Ready	Opt-in	Falonso@explorance.com
Erin	Gonzalez	Ready	Opt-in	Egonzalez@explorance.com
Carol	Goodman	Ready	Opt-in	Cgoodman@explorance.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.



Survey management | Dashboard | Task management | **Email center** | Responses | Export history

1 Invitation | Find a notification | Total of 5 invitations

Email status 2

<input type="checkbox"/>	First name	Last name	Read	Clicked	Spam	Failed	Sent on
4	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

3 ✖

## THINGS TO KNOW ABOUT RESENDING EMAILS

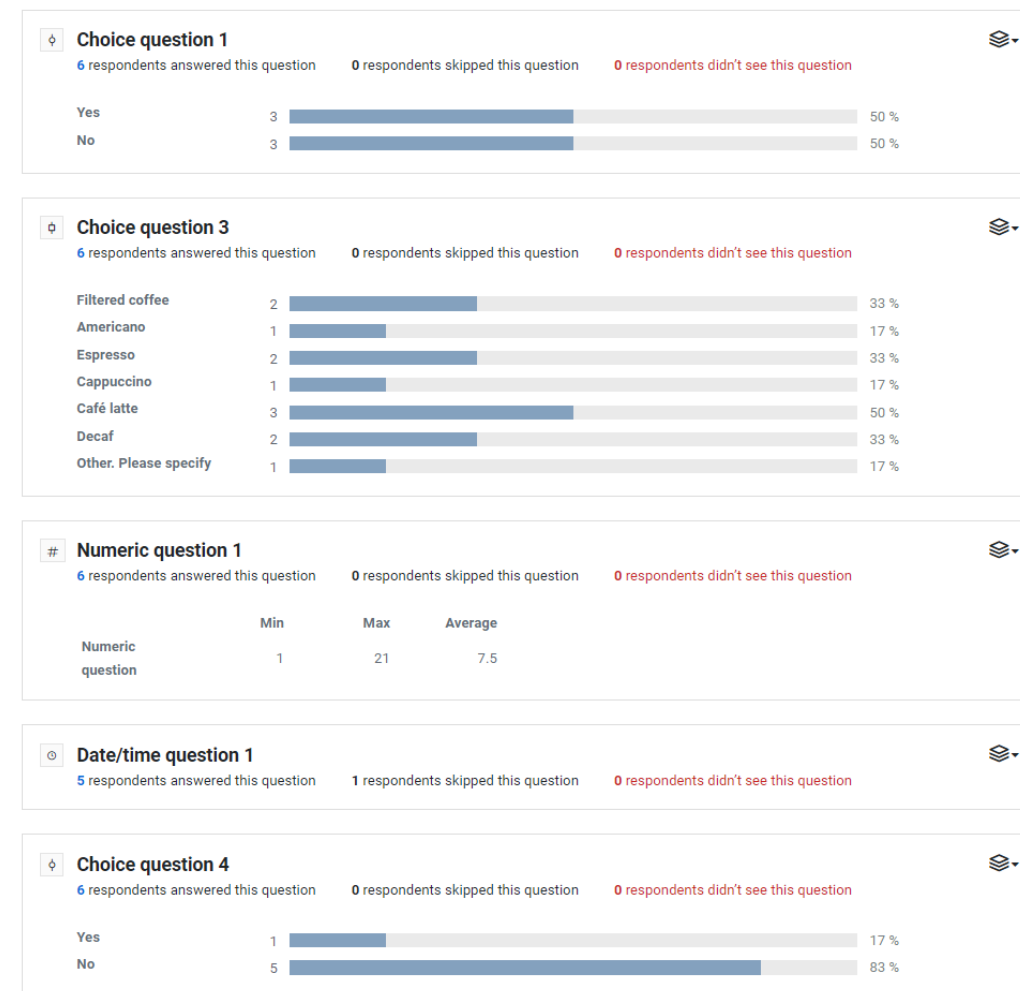
- You can resend any type of email.
- The recipient email address is the only field you can modify when resending an email. If you want to modify the email message, send a manual email instead.
- If the same email is resent multiple times, it will only be counted once in the Dashboard.
- You can select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

Q
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

