Tetherfi Agent Scripting

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Version History

Version #	Implemented By	Revision Date	Approved By	Approval Date	Description of Change
0.00a	Amitha Maithry (Amy)				Initial draft
1.00	Amitha Maithry (Amy)	29/05/2019	Prakash D'Souza		Baselined user guide

1. Preface

Welcome to the *Tetherfi Agent Scripting 1.0 User Guide.* This document describes how to design survey questionnaires and its display during the survey conduction.

This preface provides an overview of this document, intended audiences and document version.

Tetherfi Agent Scripting application is a sophisticated tool for designing the surveys. It is an easy-to-use web application with advanced features that anyone with the prior knowledge of using the web application can quickly design the surveys.

Who should read this guide?

This guide is intended for anyone designing the questionnaires in Tetherfi Agent Scripting application.

Every effort has been made to present the application in an easy-to-understand manner. There are a significant number of unique features and market leading functionalities demonstrated here. Some of the terminologies might be new to you and there is a Glossary section provided to help you out.

Document Version

A version number appears at the bottom of the inside front cover of this document. Version numbers change as new information is added to this document.

Glossary

No.	Short Form	Abbreviation
1	TAS	Tetherfi Agent Scripting
2	TCM	Tetherfi Campaign Manager
3	TMAC	Tetherfi Multimedia Agent Client
4	OCM	Omni Channel Management

TAS features summary:

1. Create questions with different type of answer namely single choice, multi choice, ranking answers and custom answer

2. Add, edit and delete questions

3. Branching questions logically

4. Tabs are provided to break a questionnaire into smaller questionnaire flows

5. Exit and Entry connectors to connect questionnaire fragments in mulitple tabs

6. Conditional node to support branching of questions

7. Dashboard to provide view of the questionnaire versions and status

8. Copy and Paste nodes

9. Cut and Paste nodes

10. Simulate the questionnaire

11. Different roles and access of features to these roles

12. Display of questionnaire to the agent

13. Offline survey questionnaire upload

14. Build and Import questionnaire to another server

2. User Management

About User Management

TAS application access is provided to the user in the OCM application. TAS user will have to navigate to TAS application from the Agent Scripting module in OCM. Access to TAS can be both Role based as well as Page based access.

There are 4 roles in TAS application. Let us see how to provide access to each of this role in OCM.

1. Maker
2. Checker
3. Previewer
4. Maker-Checker

Browser Compatibility

TAS is designed to be compatible with below web browser:

• Microsoft Internet Explorer (IE 11 or above)

OCM Access

TAS is accessed through OCM application. Let us see how to access OCM application.

Procedure:

1. enter the provided OCM URL(http://IP:PORT/OCM) in the browser and press **Enter.**
2. OCM will prompt to enter **Username** and **Password**.
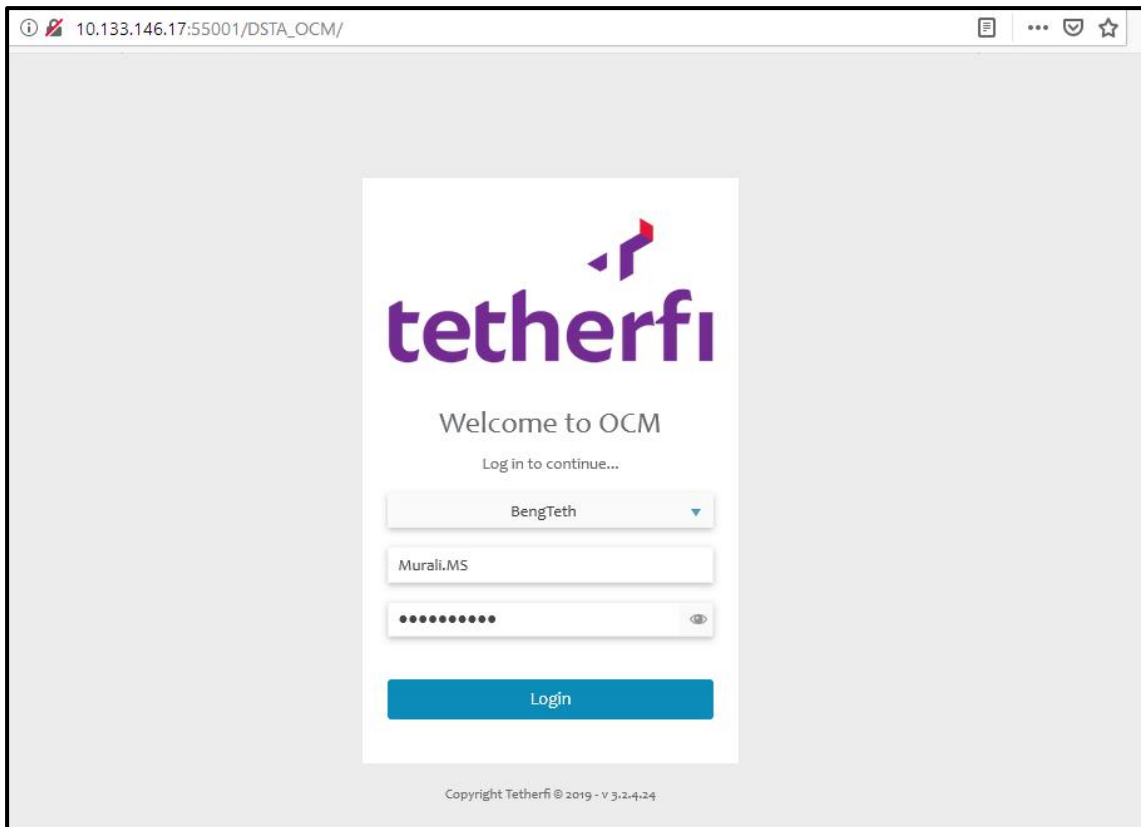
Figure 2.1 – OCM Login page

3. After successful authentication, the below screen will be displayed.
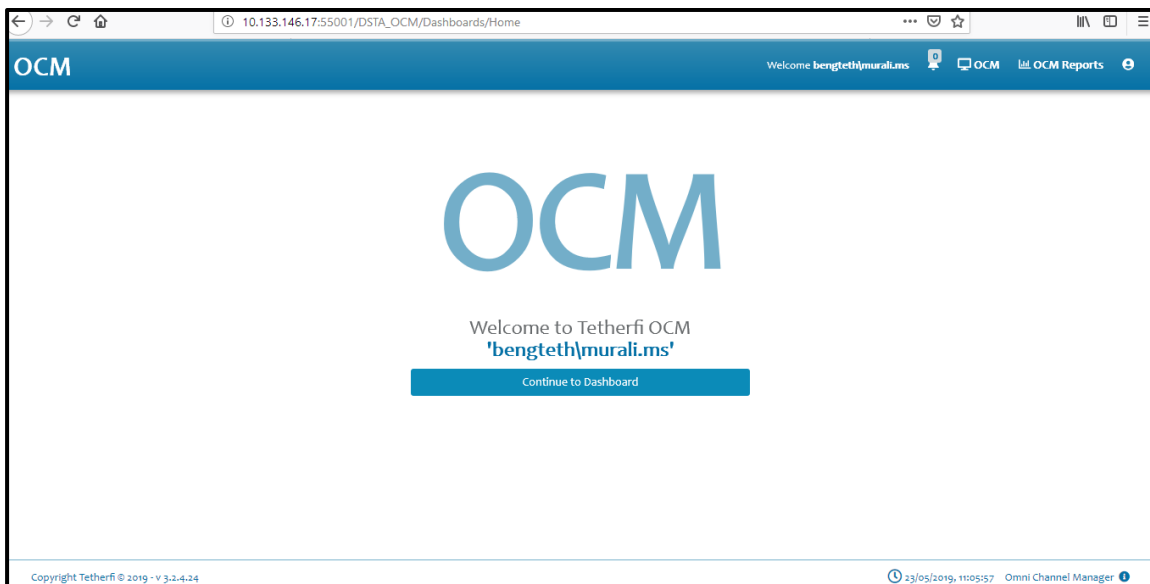
Figure 2.2 – OCM Landing page

4. You will be presented with the OCM dashboard
5. Upon logging into OCM, click on **OCM** menu will be displayed on the top right of the header.

OCM modules required for TAS Role based access

TAS access procedure is explained in detail below.

There are 3 modules in OCM that are required to access TAS application.

1. Role Based Access Management
2. User Role Mapping
3. Agent Scripting

Agent Scripting, Role based Access Management module and User Role Mapping module are displayed in the Home menu.
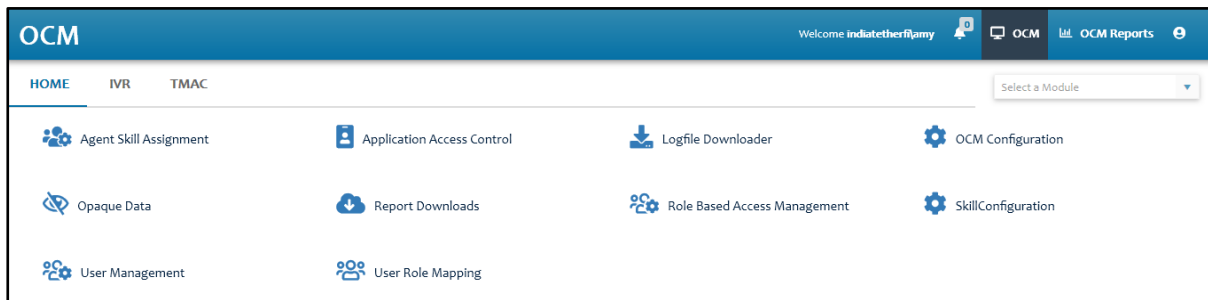
Figure 2.3 – Role Based access Management and User Role Mapping module in Home menu

Role Based Access Management

Different roles that are created will be available in this module.

Procedure:

1. In the **Home** menu, click on **Role Based Access Management** module
2. **Role Based Access Management** module will be displayed
3. All the roles that are created in OCM will be displayed in the grid
4. Select the role to which Agent Scripting module access has to be provided

Figure 2.4 – Selecting role in Role Based Access management module

5. Click on the selected role. Role Based User Access pop up window is displayed.

Figure 2.5 – Role Based User Access pop up window

6. Click on **Other Applications** tab.
7. Check **Agent Scripting Maker**.
8. Close the pop up window
9. Now a role is having the Agent Scripting Maker role

Now let us map the role to a user. This mapping has to be done in User Role Mapping module.

User Role Mapping module

Figure 2.6 – Mapping the role to user

Procedure:

1. In the **Home** menu, click on **User Role mapping** module

2. Click on the user to whom the role has to be mapped
3. Add the role to the user
4. For the changes to be reflected, logout of OCM and login, Agent Scripting module will be displayed in the Home menu.
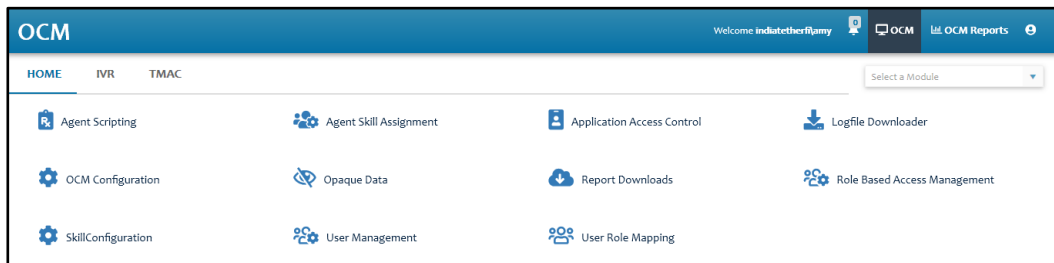
Figure 2.7 – Agent Scripting module in Home page

5. Click on **Agent Scripting** module to navigate to TAS.
6. User will be logged in to TAS in a Maker role

Likewise, follow the same process as above to provide access to Checker role and Previewer role.

In the Other application tab, choose Agent Scripting Checker to provide access to TAS checker role.

In the Other application tab, choose Agent Scripting Previewer to provide access to TAS Previewer role.

In the Other application tab, choose Agent Scripting Maker and Agent Scripting Checker to provide access to TAS Maker Checker role.

Roles in TAS:

The four roles of TAS will be explained in detail in this section.

Maker:

Maker is the designer who will be designing the questionnaire in TAS. Maker will be able to create records in Master menu. Maker will be able to work on the questionnaire in draft status and also save the changes and then send it for approval.

Checker:

Checker is the approver who will review and approve the questionnaire sent by the Maker. Checker will not be able to create records in Master menu. Checker will not be able to edit the questionnaire except providing his review comments. Checker will either approve or reject the questionnaire.

Previewer:

Previewer will have read only access to the questionnaire. Previewer can see all the questionnaires irrespective of the status.

Maker-Checker:

Maker-Checker will either login as a maker or a checker. When the Maker-Checker is logged in as Maker, will be able to perform all the actions of a Maker. Makers will not be able to approve or reject their own question as a Checker. Another checker or another maker-checker will have to approve this questionnaire.

3. Agent Scripting Home Page

About Agent Scripting Home Page

It is the landing page of the user on logging into the Agent Scripting application. It is also the default page when a questionnaire is not loaded. This page features differ based on the logged in user role.

Menus of Maker Landing Page

Maker's landing page on landing to TAS has the below default features. Each of the feature is briefly explained here.
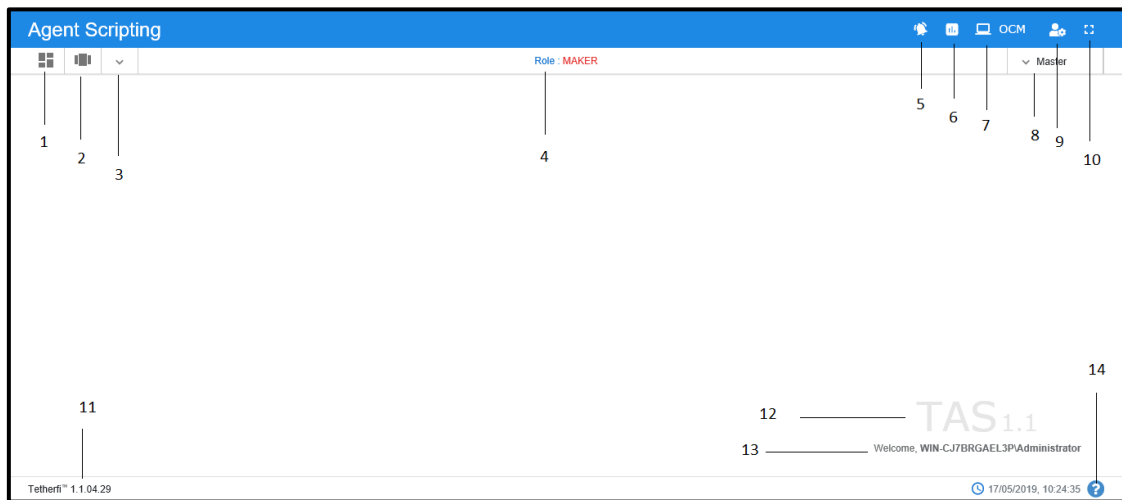
Figure 3.1 – Maker landing page

	Feature	Description
1	*Dashboard*	Displays all the Questionnaire created by all the Makers
2	*Configure Questionnaire*	Displays the list of Questionnaires created by all the Makers
3	*More menu*	Displays the Import Questionnaire and Offline Survey menus
4	*Role*	Displays the role of the user who has logged into the application. For Maker login, it will display Maker. For Checker login, checker will be displayed. For Previewer, Previewer will be displayed.

5	*Questionnaire Notifications*	Use this option to check all the notifications related to Questionnaire.
6	*Redirect to Response Monitor Report*	Use this button to navigate to Response monitor report
7	*Redirect to OCM*	Use this option to navigate to OCM application.
8	*Master*	Displays 4 masters. Demographic keys, Glossary, Intent and Question Master.
9	*Current User Info*	Use this option to know user's domain name/ user name and for logging out of Agent Scripting application.
10	*Full Screen*	This option is used to view the Agent Scripting in full screen. (Press "Esc"/F11 button to go back to normal view)
11	*Application version*	Current Agent Scripting application version is displayed here
12	*Welcome message*	At the center of the page, welcome message is displayed along with user's domain name/user name. Configure questionnaire option is also provided here.
13	*Application Major version*	Major version of the application will be displayed. It will be TAS <x.y>
14	*File version*	All the files with the version will be displayed in a pop up window.

Checker Agent Scripting Landing Page

Checker's landing page has all the features of Maker except Checker will not have access to Masters menu. Also the Role will be Checker.
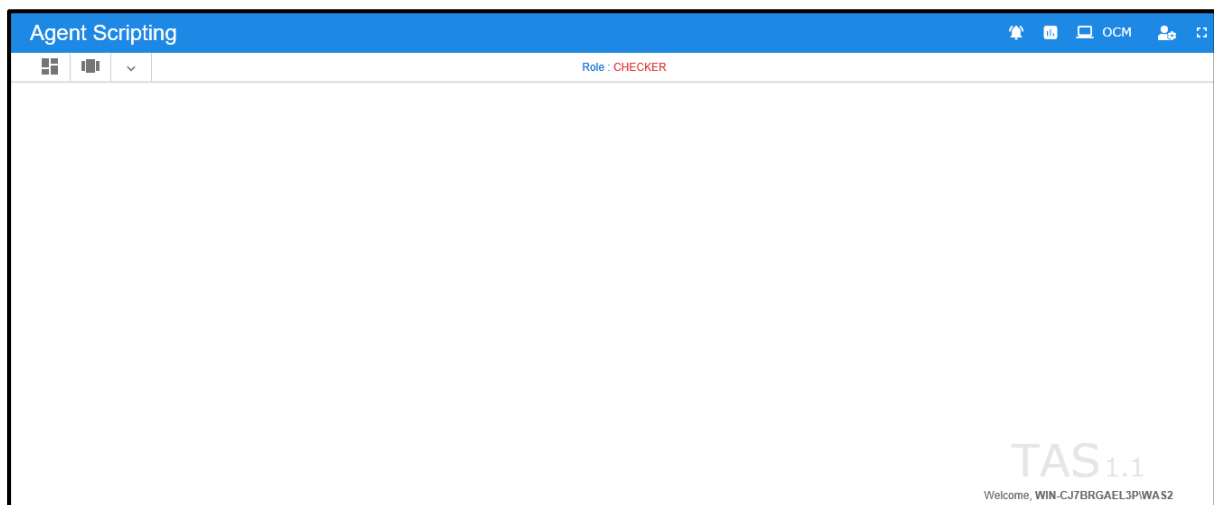
Previewer Agent Scripting Landing Page

Previewer's landing page has all the features of Maker except Previewer will not have access to Masters menu. Also the Role will be Previewer.
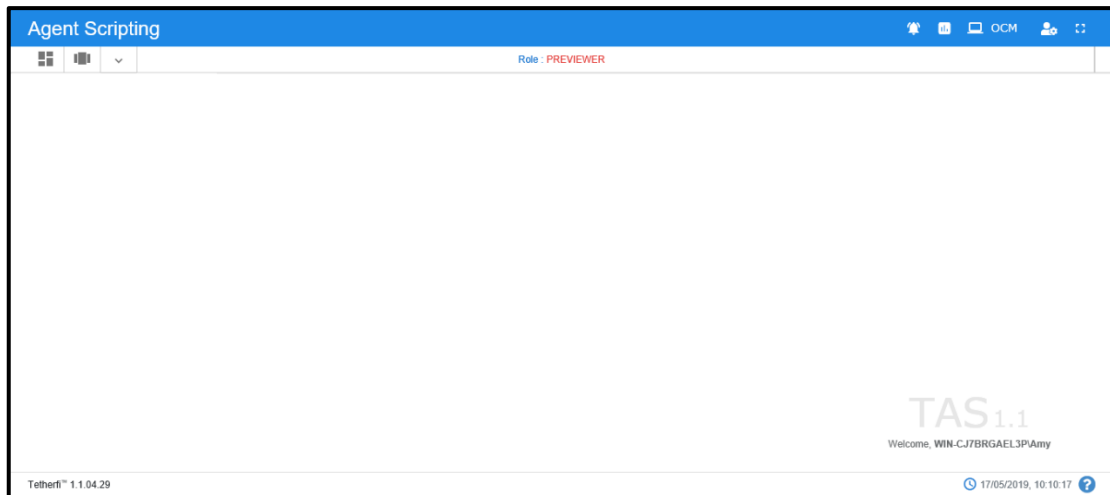
Figure 3.2 – Previewer landing page

Maker - Checker Agent Scripting Landing Page
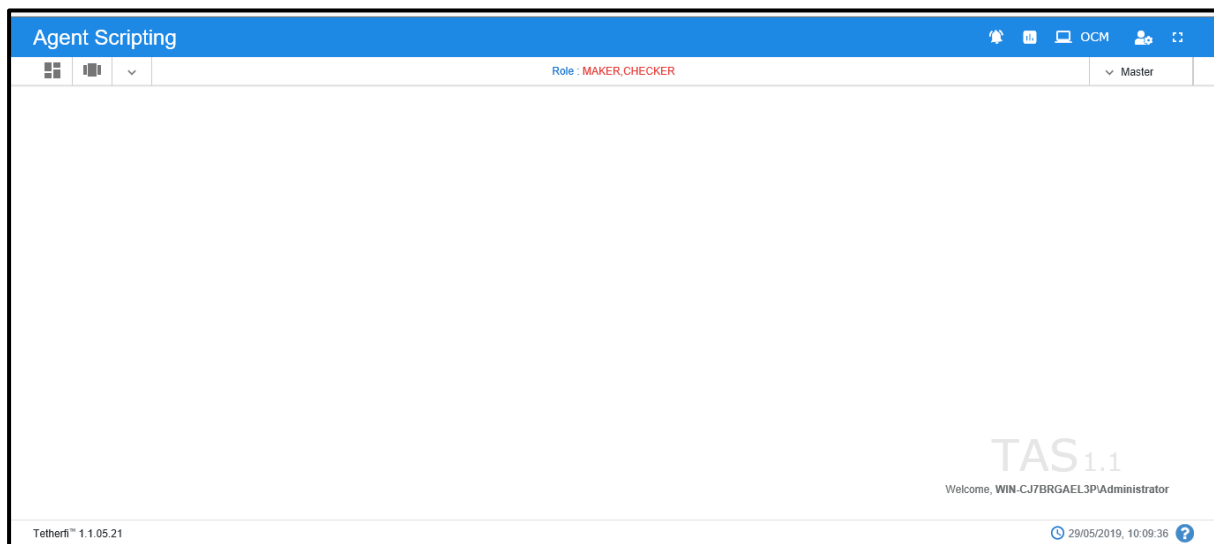
Figure 3.3 – Maker Checker landing page

4. Configure Questionnaire

About Configure Questionnaire

A questionnaire can be created either by using the **Configure Questionnaire** or from the **Dashboard** feature. The purpose of **Configure Questionnaire** is to create and manage the questionnaire.

Users who can access:

- Only Makers have the privilege of creating and deleting the Questionnaire.
- Checkers and Previewers can only preview the questionnaire.

Presence on the screen: as a menu on the left-hand side of the top menu bar

Function of Configure Questionnaire

1. Creating a Questionnaire
2. Preview the Questionnaire
3. Delete the Questionnaire

Creating a Questionnaire

Procedure:

1. In the top menu bar, click on **Configure Questionnaire** menu
2. **Configure Questionnaire** pop up window is displayed
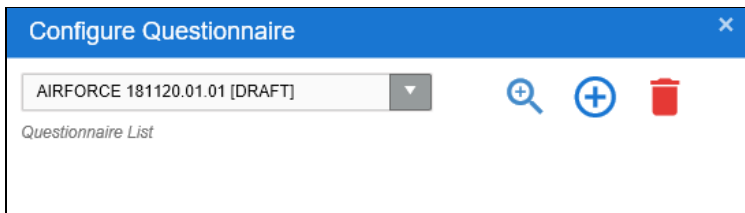
Figure 4.1 – Configure Questionnaire

3. Click on **Add Questionnaire** ⊕ button 🗑
4. **Agent Scripting: Questionnaire** pop up window is displayed
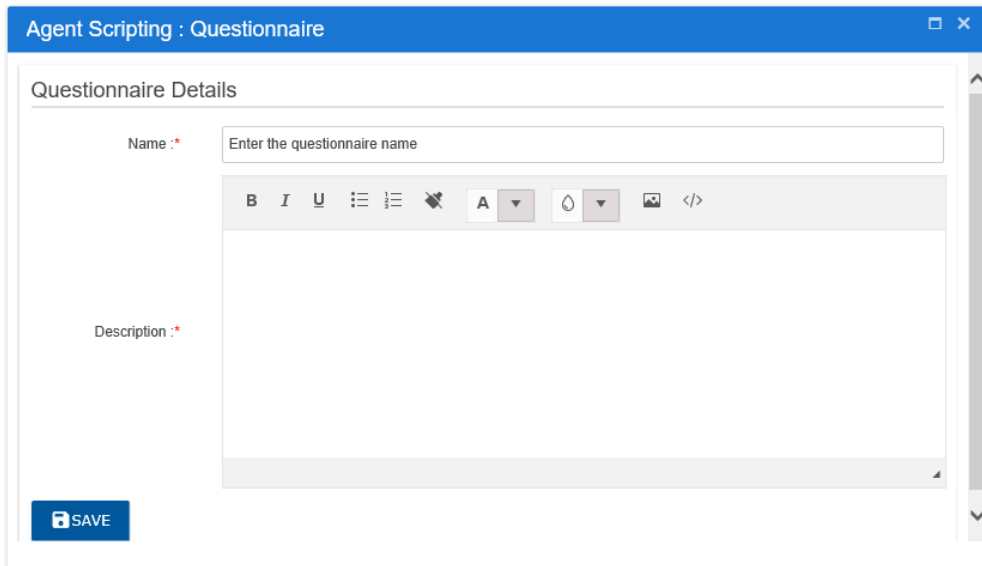
Figure 4.2 – Questionnaire details pop up window

5. Enter the **Name** and **Description** including other required details like providing image to description

6. Click on **Save**

7. Questionnaire is created.

8. Created Questionnaire will be available in the **Questionnaire** drop down list in Configure Questionnaire

Attributes of Questionnaire during creation:

Field/Button	Description
Name	Enter the questionnaire name. It does not accept any spaces. An error message 'All fields marked with an asterisk(*) are required.' should be displayed when the field is left blank and saved.
Description	Enter the description for the questionnaire. HTML editor is available. HTML code can be directly inserted to the editor. Bold, Italics, Underline, bullets, numbering and image insertion features are available. An error message 'All fields marked with an asterisk(*) are required.' should be displayed when the field is left blank and saved.

Preview a Questionnaire

Procedure:

1. In the top menu bar, click on **Configure Questionnaire** menu
2. **Configure Questionnaire** pop up window is displayed
3. Click on **view/Preview Questionnaire** 🔍 button
4. **Selected Questionnaire** is displayed in the Agent Scripting screen and it will be opened in the last saved status.

Deleting a Questionnaire

Procedure:

1. In the top menu bar, click on **Configure Questionnaire** menu
2. **Configure Questionnaire** pop up window is displayed
3. Select a questionnaire to be deleted from the Questionnaire drop down list
4. Click on **Delete Questionnaire** 🔍 button
5. "Do you want to delete the selected questionnaire?" confirmation message is displayed with a **Yes** or **No** button
6. Click on **Yes**
7. Questionnaire is deleted and will not be available in the Questionnaire drop down list

5. Masters

About Master

Master is a main menu through which Glossary, Intent and Question master can be accessed.

Presence on the screen: as a menu on the right-hand side of the top menu bar and is present only for the Makers on their landing to TAS application as well as on loading the questionnaire.

Demographic Keys Master

Demographic keys are nothing but the standard and dynamic fields that available in contact CSV in TCM for a respondent. This feature helps the questionnaire designer to have all these fields as keys in master such that these are available in the demographic keys drop down field for all the single choice question. These keys can be reused as and when required while designing the question.

Users who can access: Only Makers have the privilege of creating and editing Demographic Keys Master.

Presence on the screen: as a menu on the right-hand side of the top menu bar under ***Masters***

Properties of Demographic keys:

Fields/buttons	Description
Key	enter the key
Save	Button to save the entered key
Clear	Button to Clear the entered key
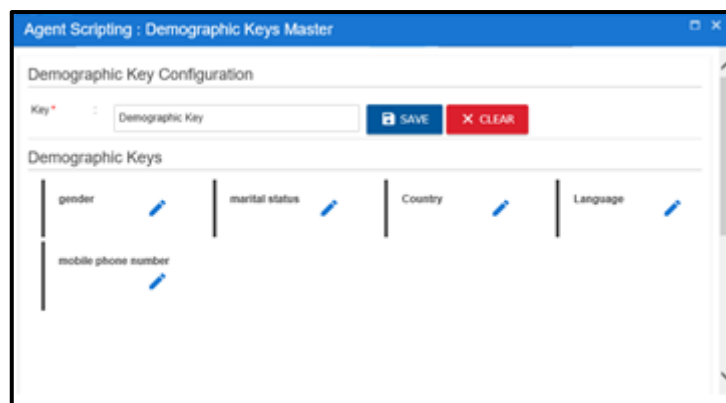
Figure 5.1 – Demography Key Master

Add Demographic key :

Procedure:

1. In the top menu bar, click on **Master** menu
2. In the **Master** menu, click on **Demographic Keys**
3. **Agent Scripting: Demographic Keys** pop up window is displayed
4. Enter the **key**.
5. Click on **Save** button
6. "**Do you want save?**" confirmation pop up window is displayed
7. Click on **Yes** to add the demographic key
8. demographic key gets added to the demographic key master list

Edit Demographic keys:

Procedure:

1. In the top menu bar, click on **Master** menu
2. In the **Master** menu, click on **Demographic Keys**
3. **Agent Scripting: Demographic Keys** pop up window is displayed
4. select the demographic key to be updated from the Demographic keys list
5. click on the **Edit** button present next to the selected glossary
6. selected demographic **key** is displayed in the Key
7. Click on **Save** button
8. "Do you want save?" confirmation pop up window is displayed
9. Click on **Yes** to update the demographic key
10. selected demographic key gets updated to the new value

Deleting Demographic keys:

Demographic key cannot be deleted. It can be only edited.

Glossary Master

Glossary is a brief dictionary containing explicit and unambiguous description of the meaning of a term. Glossary Master is an inventory of glossaries that can be added to any question. Any word present in a question can be added to a glossary such that the operator on hovering the word during the survey conduction gets to know the meaning or abbreviation of such a word.

Glossary can be added to the Glossary Master in 2 ways:

1. Adding through the front end UI
2. Importing using the glossary import template in CSV format

Glossary is a key value pair.

Users who can access: Only Makers have the privilege of creating, editing and importing glossary to Glossary Master.

Presence on the screen: as a menu on the right-hand side of the top menu bar under *Masters*

Properties of Glossary:

Fields/buttons	Description
Key	enter the key
Value	Enter the value for the key
Save	Button to save the entered key and value
Clear	Clear the entered key and value pair
import	To import the glossary from csv template to the glossary

Add Glossary from UI:

Procedure:

1. In the top menu bar, click on **Master** menu
2. In the **Master** menu, click on Glossary
3. Glossary Master opens as a pop up window
4. Enter the **key** and **value** pair. Key is the abbreviation or an acronym or a word and value is it's phrase.
5. Click on **Save** button
6. "Do you want save?" confirmation pop up window is displayed
7. Click on **Yes** to add the glossary
8. Glossary gets added to the glossary master grid

Edit Glossary from UI:

Procedure:

1. In the top menu bar, click on **Master** menu
2. In the **Master** menu, click on **Glossary**
3. Glossary Master opens as a pop up window
4. select the glossary to be updated from the glossary grid
5. click on the **Edit** button present in the last column of the selected glossary
6. selected glossary's **key** and **value** is displayed in the Key and Value text field
7. only value can be edited
8. Click on **Save** button

9. "Do you want save?" confirmation pop up window is displayed
10. Click on **Yes** to update the glossary
11. selected glossary gets updated to the new value

Deleting glossary:

Glossary cannot be deleted. It can be only edited.

Importing Glossary:

Glossary template is in .csv format. Glossary is imported through the glossaryimport template. Glossary can also be imported through the QuestionImport template along with importing question.

Procedure:

1. In the top menu bar, click on **Master** menu
2. In the **Master** menu, click on Glossary
3. Glossary Master opens as a pop up window
4. click on **Import** button present below the value text field
5. **Import Glossary** pop up window is displayed

Figure 5.2 – Import Glossary pop up window to select file

6. Data is added to the GlossaryImport.csv file. CSV file is in UTF-8 format.
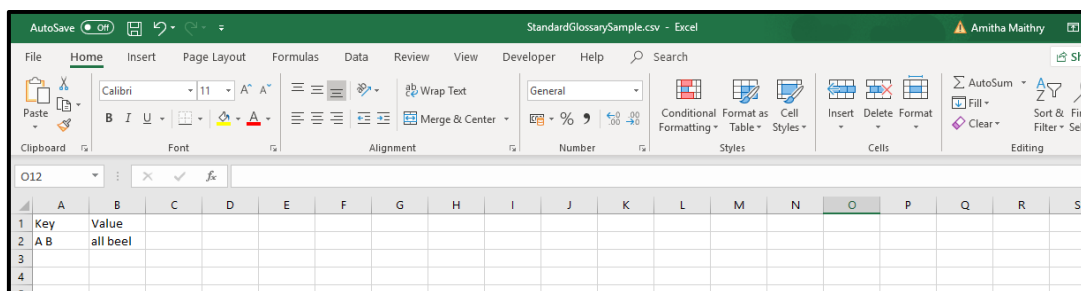
Figure 5.3 – Import Glossary CSV file format

7. Click on **Select File** button and select the Glossaryimport.csv file from your local system
8. File gets selected and the name of the file is displayed in the text field
9. Click on **Upload** button
10. **upload selected file?** confirmation pop up window is displayed with **Cancel** and **Upload** button
11. Error messages will be displayed if the template attached below is not followed.

Standard CSV template is attached below. You have to use this template to import the glossaries.

GlossarySample.csv

Glossary Master Grid details

Glossary Master grid opens up on clicking the Glossary Master menu in the top menu bar.

Column	Description
Key	Displays the keys that are added
Value	Displays the values that are added to the key

About Intent Master

Intent Master is the repository of Intents.

To conduct the survey, Questionnaires have to be designed and approved by the Checker. Approved questionnaire has to be mapped to an Intent. This intent should be the same as that created in TCM (Tetherfi Campaign Manager).

Survey is conducted for Questionnaires that have been mapped to an Intent. Each Intent can have multiple questionnaires mapped. During the survey conduction, any of the mapped questionnaire is randomly picked and its questions are displayed to the Agent.

Presence on the screen: as a menu on the right-hand side of the top menu bar under *Masters*
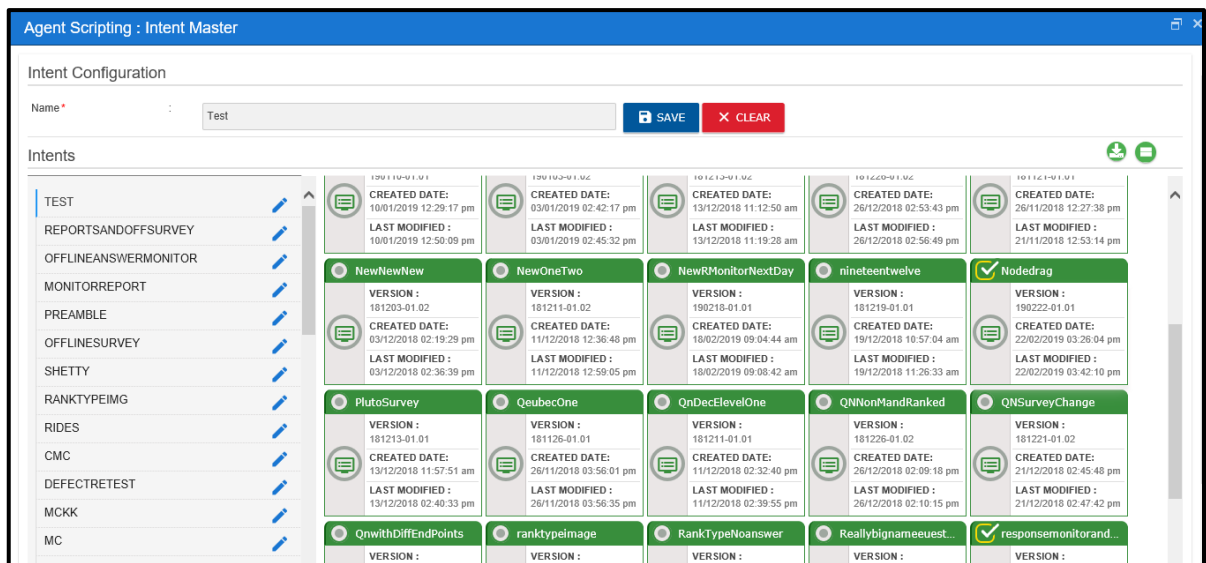
Figure 5.4 – Intent Master pop up window

View Archived Questionnaires:

Questionnaires are archived only when a survey is conducted by the agent. In the survey interruption and resumption scenario, questionnaire version that was earlier used by the survey has to retrieved during the resumption of the same survey.

Presence on the screen: on the top right of the questionnaire grid as a green button

About Question Master

Question Master is an inventory of questions that can be used in any survey. Only Makers have the privilege of creating, editing and importing questions to Question Master.

There are two ways of creating questions.

1. Questions can be created in the Question Master UI and used in Questionnaire
2. Questions can be uploaded using the import feature

Checker and Previewer do not have this feature in their home page.

Questions from Question Master are directly dragged and dropped to the Agent Scripting screen for creating a question node. Question node and Question Master are independent of each other which means there is no connection between the two once the question is dropped to the screen.

Presence on the screen: as a menu under *Masters* on the right-hand side of the menu bar.

Question Master Grid details

Question Master grid opens up on clicking the Master menu in the top menu bar.

Figure 5.5 – Question Master grid

Add Question field descriptions

Questions can be created through Question Master page.

Field/Button	Description
Question	Enter the question An error message 'All fields marked with an asterisk(*) are required.' should be displayed when the field is left blank and saved. 'Enter question' message should be when there is an attempt to add any type of answer without having a question.
Description	Detail out the description of the question
Answers	It is an answer list for the question. Answer list is created by entering the answer choices in the Answers section. It can be list of either single choice and custom label or multiple choice and custom label. It cannot be a mix of single choice and multiple choice.
Comments	Enter the comments for the question.
Answer settings:	Single, multiple, rank and custom choice answer can be created/edited/deleted here
Single Choice	Enter the single choice answer

	Placeholder text: Single choice answer
	Add + and Clear X buttons are present on the right hand side of the text field.
	To clear a single choice answer:
	1. Enter the text in the text field and click on X button.
	2. Answer should be cleared from the text field.
	Blank answer cannot be added. If there is an attempt to add one then there is alert message 'Enter valid answer.'
	Duplicate answers cannot be added. 'Answer <answer> already exists in the answer list.'
Multiple Choice Answer	Specify the multiple choice answer
	Placeholder text: Multiple choice answer
	Tooltip:
	Add + and Clear X buttons are present on the right hand side of the text field.
	Blank answer cannot be added. If there is an attempt to add one then there is alert message 'Enter valid answer.'
	Duplicate answers cannot be added. 'Answer *<answer>* already exists in the answer list.' error toaster will be displayed.
Input type:	Use this section to create custom answer text
Custom Label *Data Type*	Enter the custom label
	Placeholder text: Enter label
	Tooltip:
	Add + and Clear X buttons are present on the right-hand side of the Data Type field.
	• Blank answer cannot be added. If there is an attempt to add a blank answer then there is alert message 'Enter valid answer.'

	• Duplicate answers cannot be added. 'Answer <answer> already exists in the answer list.'

Add question with single choice answer

Procedure:

1. In the top menu bar, click on **Master** menu
2. In the Master menu, click on **Question** ❓
3. **Question Master Grid** which is a pop up window opens up
4. Click on **Add** button present on the top right of the grid, **Question** window opens up
5. In the **Question** field, enter the question that will be asked to the contact during the survey.
6. Add glossary to the question by clicking on the **Glossary** button present on the top right of the question window
7. Add description to the question by clicking on the **Description** button present on the top right of the question window
8. Select **Single Choice** option from the different answer types tab present in the **Answer Details** section
9. Enter the answers and Click on + button.
10. **Answers** will have the answers list with each choice having a **radio** button.
11. Single choice answer list can also have custom answers. Use the **Custom Label** field to specify the label name and **Data type** of the label.
12. to add Custom label, enter text in Custom Label field and choose its data type
13. **Answers** list individual answer choice can be edited or deleted.
14. Specify the comments for the Question in the **Comments** field.
15. Click **on Save.**
16. The added question will appear in the Question Master grid

Add question with multiple choice answer

Procedure:

1. In the toolbar, click on ❓ button for opening **Question Master** pop up window
2. In the **Question** field, enter the question to be asked to the contact.
3. Add glossary to the question by clicking on the **Glossary** button present on the top right of the question window
4. Add description to the question by clicking on the **Description** button present on the top right of the question window

5. Enable **Min Max** to set minimum and maximum answers to be answered by respondents during the survey conduction

6. Create the multiple choice answer list by entering the choices in **Multi Choice** text field. Click on **+** button.

7. **Answers** field will have this Answer list with each choice having a checkbox.

8. Multiple choice answer list can also have custom answers. Use the **Custom Label** field to specify the label name and **Data type** of the label.

9. Answers list individual answer choice can be edited or deleted.

10. Specify the comments for the Question in the **Comments** field.

11. Click **on Save.**

12. The added question will appear in the Question Master table

Add question with Ranked choice answer

Procedure:

1. In the toolbar, click on [?] button for opening **Question Master** pop up window

2. In the Question field, enter the question to be asked to the contact.

3. Create the Ranked choice answer list by selecting the **Rank choice** tab

4. Enable **Min Enabled** to set minimum answers to be answered by respondents during the survey conduction

5. enter the choices in **Rank Choice** answer text field. Click on + button.

6. **Answers** field will have the ranked choices Answer list and individual answers can be reordered

7. Specify the comments for the Question in the **Comments** field.

8. Click **on Save.**

9. The added question will appear in the Question Master table present below the **Question Details** section.

📌 ***Note***: *Question with Rank choice answers cannot have a custom answer so custom answer label and data type fields will not be present for Rank choice.*
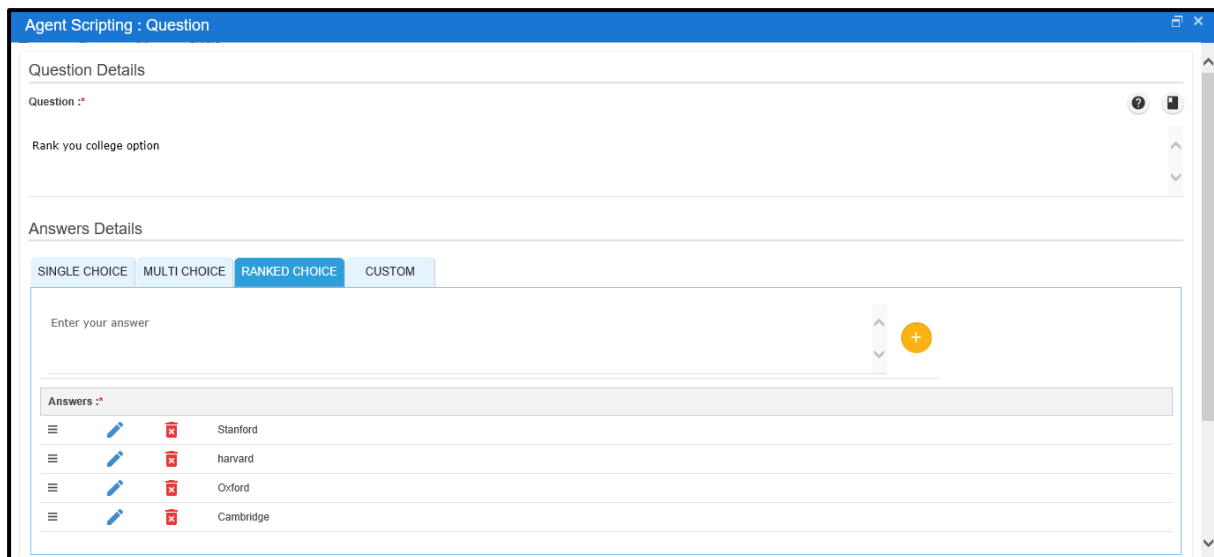
Figure 5.6 – Question Master's Ranked Choice Question and answers

Add question with Custom choice answer

Procedure:

1. In the toolbar, click on [?] button for opening **Question Master** pop up window
2. In the **Question** text field, enter the question to be asked to the contact.
3. Create the Custom choice answer list by selecting the **Custom** tab
4. Use the **Custom Label** field to specify the label name and choose **Data type** from the drop- down list
5. click on **+** button.
6. Answer should be added to the Answer list in the Answers field.
7. Specify the comments for the Question in the **Comments** field.
8. Click **on Save.**
9. The added question will appear in the Question Master table present below the **Question Details** section.

Note: Only one custom choice answer can be added to a question

Edit Question from Question Master Grid

Procedure:

1. In the **Question Master Grid**, select the Question which has to be edited.
2. Click on the **Edit Question ...**
3. Selected answer to be edited from the answer list. It should be displayed in the answer text field.

4. Make the required changes to the Answer and click on Add.
5. Click on **Save**
6. changes to the Question are saved and the **Question Master Grid** is updated.

Delete Answers of Question from Question Master Grid

Procedure:

1. In the **Question Master Grid**, select the Question which has to be edited.
2. Click on the **Edit Question**
3. Select the answer from the answer list and click on **Delete** button
4. Confirmation message 'Do you want to delete answer'? is displayed.
5. Click on **Yes** button
6. Answer should be deleted from the Answer list

📌 *Note:* This is the procedure for deleting all type of answer choices except Custom answer

Importing Questions to Question Master

Questions can be imported to the Question Master by uploading questions via CSV file in UTF-8 standard (when saving the excel it should be saved in CSV UTF-8(Comma Delimited).csv). It allows the upload of below type of Questions

- Single
- Multi
- Rank
- Custom
- Single-custom
- Multi-Custom

Below Image shows the format for CSV Upload template

Introduction to CSV template for Question Upload

The CSV template uses the first 21 columns of the Excel. Below are the columns and a brief explanation of each of the column.

Field/Button	Description
Type	This is the first column in the template, this specifies the type of question. The question can be any one of the question types mentioned above.

Question	The actual question the user wants to display on the screen.
Description	Description for the question, the description field can be blank if the question does not have a description.
Glossary	The glossary items for the Question. The glossary must be entered in the below format.
	When there is only one item in the glossary.
	Acronym: Full form
	When there are multiple items in the glossary each item can be separated by '|'symbol.
	Acronym1: Full form1 |Acronym2: Full form2|Acronym3: Full form3
Answer	The user has an option to add 15 answers for a question, that is the reason for 15 answer columns.
	• The answer1 is the first answer to be displayed for a question and this is mandatory for all the question types, except for the custom type.
	• If the user has 3 answers to be displayed and filled data columns 1,3 and 4 this will be considered as valid. When this is displayed in UI the blank column (2) is ignored and rest three answers will be displayed.
	• If the user repeats an answer multiple time for the same question, then the question will be considered as invalid.
Label	The text in this column is displayed as label for the custom answer field.
Datatype	This column specifies the datatype for the custom answer, the datatype can be any of the following.
	• Date
	• DateTime
	• Time
	• Month
	• Year
	• Month/Year
	• Text

⚓ ***Note:*** *If the glossary format is wrong the question will be treated as invalid. The glossary field can be set to blank if there are no glossary items.*

When the questions have glossary attached to them the glossary word will be highlighted as shown in the below image.

Creating questions and uploading CSV

Single choice questions

This type of question will have multiple answers and the contact can choose one among them.
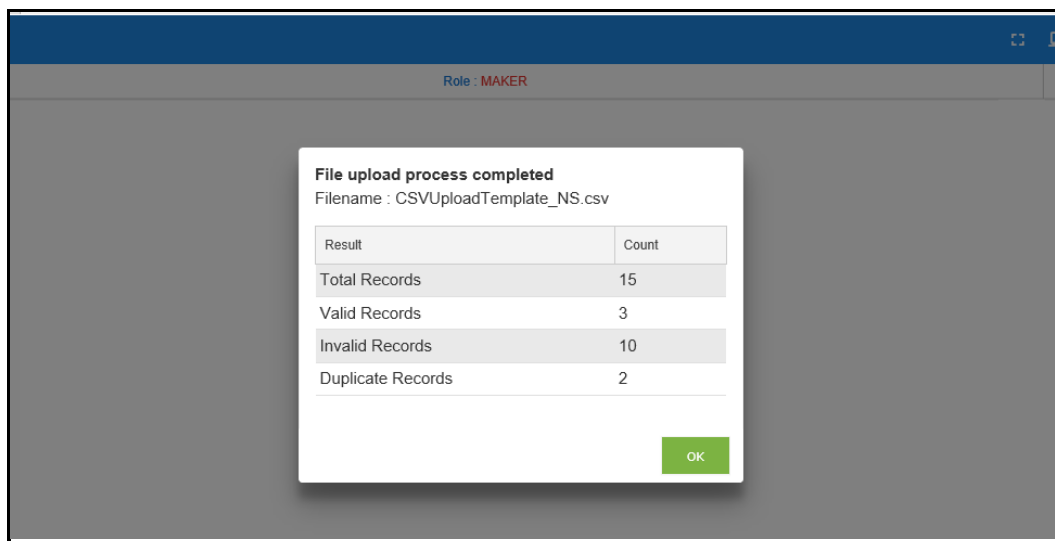
6. Dashboard

About Dashboard

Dashboard provides at-a-glance view of all the Questionnaires created/edited by the user. Display of the questionnaire is based on its status. It can be configured to display questionnaires with only certain statuses.

Maker Dashboard

Maker will be able to view the questionnaires that are created by all the Makers. Maker will also be able to view the questionnaires in all the statuses. However, this is configurable feature.
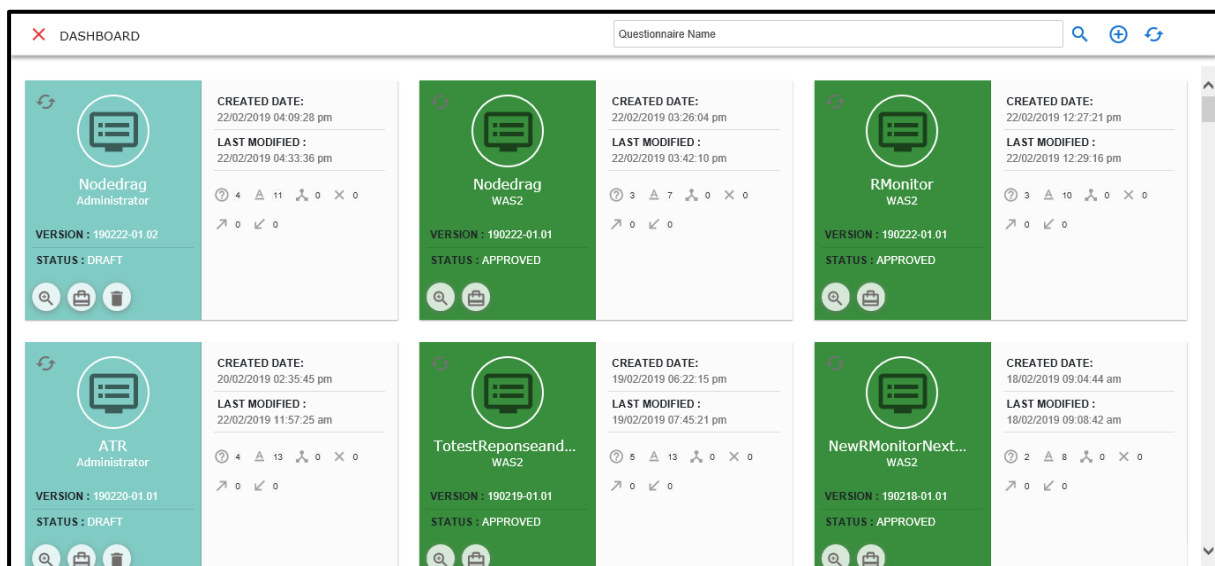
Figure 6.1 – Maker dashboard

Features of Dashboard

Each questionnaire is displayed as a card in the Dashboard. Below are the features:

1. Preview Questionnaire
2. Build Questionnaire
3. Delete Questionnaire

Preview Questionnaire

Procedure:

1. In the top menu bar, click on **Dashboard** menu
2. Select a questionnaire to be previewed from the Dashboard

3. Click on **view/Preview Questionnaire** 🔍 button
4. **Selected Questionnaire** is displayed in the Agent Scripting screen and it will be opened in the last saved status.

Delete Questionnaire

Procedure:

1. In the top menu bar, click on **Dashboard** menu
2. Select a questionnaire to be deleted from the Dashboard
3. Click on **Delete Questionnaire** 🔍 button
4. "Do you want to delete the selected questionnaire?" confirmation message is displayed with a **Yes** or **No** button
5. Click on **Yes**
6. Questionnaire is deleted and will not be available in the Dashboard on refreshing the dashboard

Note: Only questionnaires in draft and saved status can be deleted.

Build Questionnaire

Build Questionnaire is one of the important features of TAS. It is required when there are more than one server in the production environment hosting TAS application and the questionnaires from one server have to be imported to all the servers. Let us see the process to create build package.

Procedure:

1. In the top menu bar, click on **Dashboard** menu
2. choose a questionnaire and click on **Build Questionnaire** 💼 button at the bottom of the questionnaire card
3. A zip file of questionnaire gets created and gets downloaded to the local system

Name	Size	Packed	Type	Modified	CRC32
..			Local Disk		
Comments			File folder		
Descriptions			File folder		
responsemonitor_Administrator_190207_01_01_SAVED.json	26,187	2,991	JSON File	07/03/2019 14:51	468B32AA

Figure 6.2 – Build Questionnaire from Dashboard

4. Extracted zip file will contain the questionnaire in .json format. It will also have .json files for other features like comments, descriptions etc.

Properties of Individual Questionnaire in Dashboard:

Each Questionnaire card will have 2 sections. All the properties are read only.

Sample Questionnaire card in Dashboard.
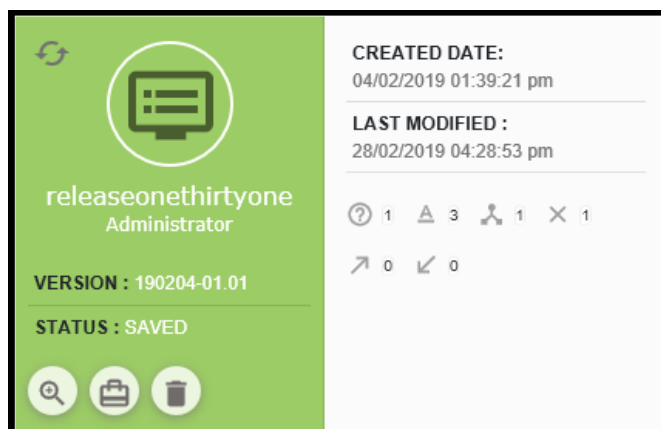
Figure 6.3 – Individual Questionnaire displayed in dashboard

Field/Button	Description
Questionnaire Name	It will the name of the Questionnaire
User Name	It is the name of the user who has last made changes to the questionnaire and saved the changes
Version	It is the current version of the questionnaire
Status	It is the current status of the questionnaire
Preview Questionnaire	button provided to preview the questionnaire
Build Questionnaire	button provided to build the questionnaire
Delete Questionnaire	Button provided to delete the questionnaire This button will not be displayed for status other than **Draft** and **Saved**.
Created Date	Date on which the Questionnaire was created It is of the format dd/mm/yyyy hh:mm:ss

Last modified	Date on which the questionnaire was last modified It is of the format dd/mm/yyyy hh:mm:ss
Nodes	Question, Answer, Conditional, Disconnect, Entry and Exit node are displayed as icon. Count of all the nodes that are currently added to the questionnaire will be displayed. Nodes which are not present in the questionnaire will have the count as 0.

Features of Dashboard Menu bar

Field/Button	Description
Search	User can search the questionnaires by providing the search criteria.
Add Questionnaire	Button provided to add a new questionnaire
Refresh	Button provided to refresh the dashboard. User can refresh the dashboard only using this refresh button. Individual questionnaire's refresh button is not currently available.

Checker Dashboard

Checker Dashboard will have all the features as that of the Maker except deleting the individual questionnaire.

Questionnaires in statuses other than Draft and Saved will be displayed.

Previewer Dashboard

Previewer Dashboard will have all the features as that of the Maker except deleting the individual questionnaire.

Questionnaires in all statuses will be displayed.

7. Import Questionnaire

About Import Questionnaire

Import Questionnaire feature along with Build Questionnaire feature is required when there are more than one server in the production environment hosting TAS application and the latest version of the questionnaire has to be moved to all the servers. Let us see the process to Import Questionnaire.

Function of Import Questionnaire

Importing a questionnaire from one server to another server can be done by either overwriting the questionnaire or without overwriting.

Importing a questionnaire from one server to another server creates a new draft version of the questionnaire provided the current status of the existing questionnaire in the importing server is other than the draft version. After importing, in the importing server, there will be 2 versions of the questionnaire, one with the newly created draft version and another already existing version. In this case, with or without overwriting option, a draft questionnaire will always be created.

In case a draft version of the questionnaire already exists in importing server then an error message is thrown to the user if there is an attempt to import the same questionnaire.

Procedure:

1. Follow the process of *creating a build of questionnaire*
2. Navigate to agent scripting screen
3. Click on down arrow button
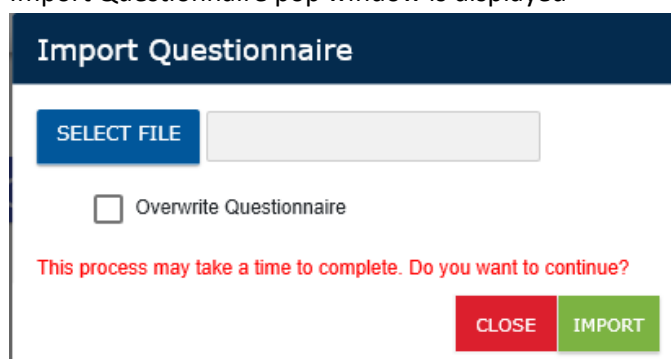4. Import Questionnaire pop window is displayed

Figure 7.1 – Import Questionnaire pop up window to select file

5. Select the zip file which was downloaded to the system
6.

8. Tab

About Tab

Tabs are provided to modularise the questionnaire by breaking it into multiple simple blocks of questions. Each tab will contain a set of questions and these tabs can be connected by using the exit point and entry point nodes.

Features of Tab

Tabs can be added, edited and deleted.

One of the tabs will be marked as the default tab. Default tab will be displayed first on loading the questionnaire.

The number of tabs that can be displayed in the tab bar is configurable. Additional tabs will be grouped together and displayed under **More tabs**. User can select the tab from the more tabs and questions of the selected tab will be displayed.

Add Tab

A new tab can be added using the Add button present in the tab bar.

Procedure:

1. Maker is logged into the application
2. In the Menu bar, click on the **Configure Questionnaire** menu button
3. Select the questionnaire to be loaded
4. Questionnaire should be in **Draft** status to add a tab
5. In the tab bar, click on the ➕ button to add new tab
6. **Tab** pop up window is displayed
7. **Name** and **comments** are mandatory fields. Enter data in these fields.
8. If you want to set the tab as a default tab then check the **Set default** checkbox
9. Click on **Save** button to add the tab

Edit Tab

A tab can be edited using the Edit button present in the tab bar.

Procedure:

1. Maker is logged into the application
2. In the Menu bar, click on the **Configure Questionnaire** menu button
3. Select the questionnaire to be loaded

4. Questionnaire should be in **Draft** status to edit a tab

5. In the tab bar, select the tab and click on the ⬚ button to edit

6. **Tab** pop up window is displayed

7. **Name** and **comments** are mandatory fields which will have the details entered while adding the tab

8. If you want to set the tab as a default tab then check the **Set default** checkbox

9. Click on **Save** button to update the changes the tab

Delete Tab

A tab can be edited using the Edit button present in the tab bar.

Procedure:

1. Maker is logged into the application

2. In the Menu bar, click on the **Configure Questionnaire** menu button

3. Select the questionnaire to be loaded

4. Questionnaire should be in **Draft** status to edit a tab

5. In the tab bar, select the tab to be deleted and click on the delete button

6. **Comments** pop up window is displayed

7. Enter the comments and click on **Delete** button

8. Tab will be deleted and will not be present in the tab bar

📌 **Note**:

Default tab cannot be deleted. An alert message will be displayed on attempting to delete the default tab. "There should be a default tab. Current tab is set as default and cannot be deleted."

9. Nodes

About Nodes

Nodes are the building blocks of the Questionnaire. They are arranged in tree structure and these are binary trees. This structure makes it easy to design a questionnaire with branching logic.
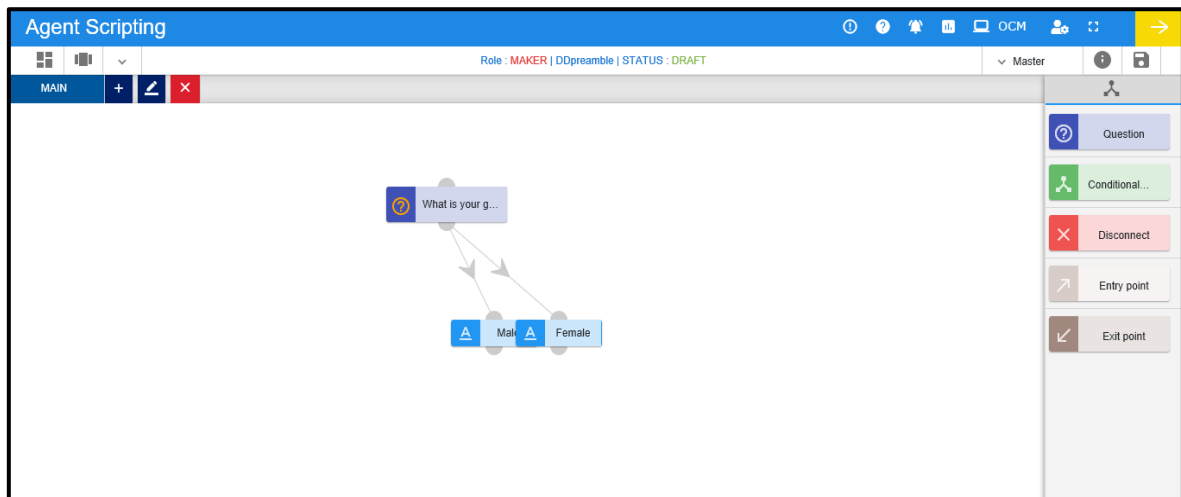
Figure 9.1 – Import Glossary pop up window to select file

Presence on the screen: Nodes are displayed as a button on top right corner of the global menubar. Click on this button to display the node list.

Question Node and Answer Node

Question nodes are dragged and dropped to the agent scripting screen from the Node menu. This node is used to create questions for a questionnaire.

Answer node is not available in the Nodes menu. It cannot be an independent node and is always connected to the Question node.
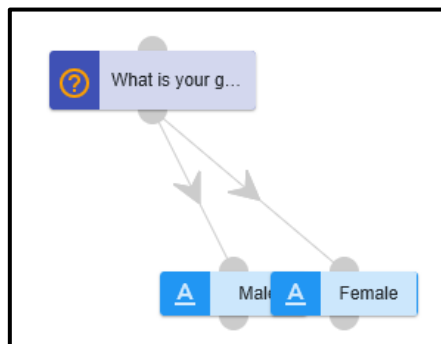
A question will have to have the answers. It cannot be saved without an answer. There are certain conditions based on the type of answer.

For typical question, below are the features that can be added.

1. Preamble
2. Glossary
3. Description
4. Answers
5. Monitoring keys
6. Demographic keys

Let us see how each of these feature can be added to a question.

Note: All the features added to the question will get added only when the question is saved.

Adding Preamble to question

Each question can have its own preamble. This will be displayed to the Agent while conducting the survey before the display of the question for which preamble is provided.

Presence on the screen: Preamble is provided as a button on clicking the question node

Procedure:

1. In the agent scripting screen, drag and drop a **Question** node
2. Hover on Question node and Click on **Edit Preamble** in question node
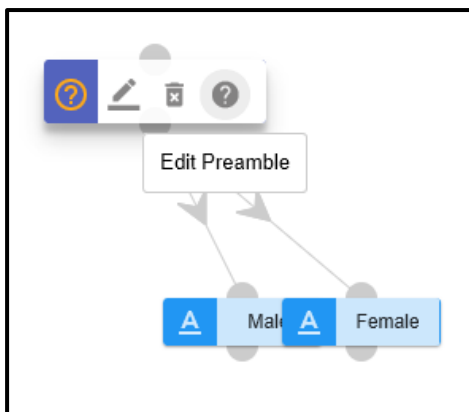
3. **Question Preamble** pop up window is displayed
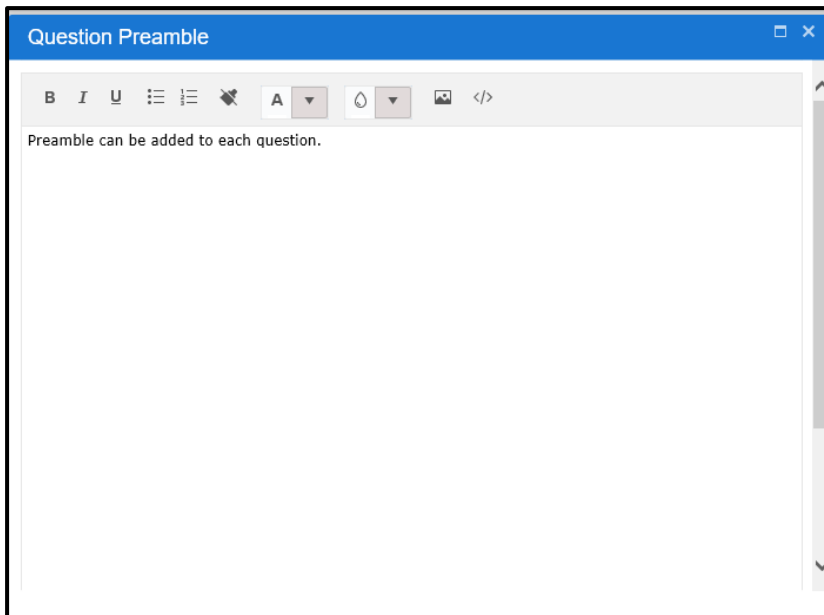
4. Enter the preamble for the question in the text box
5. Click on **Save**

Adding question as main question

A questionnaire has to have a main question. Survey will start from the main question. An option is provided to make a question as main question when providing the question details. Below screenshot has the field highlighted.

Adding Description to question

Each question can have its own description. This will be displayed to the Agent during the survey conduction.

Presence on the screen: Question description is displayed as a button on the top right of the question pop up window in same line as the Question label

Procedure:

1. In the agent scripting screen, drag and drop a **Question** node
2. Click on **Edit Details** of question node

Edit Details
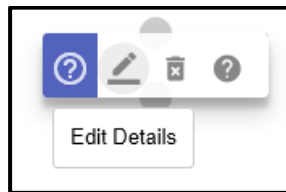
3. **Agent Scripting: Question** pop up window is displayed
4. Click on the **Question description** button on the top right
5. Question description pop up window is displayed
6. Enter the description in the text box
7. Click on **Save**

Adding Glossary to question

You can add glossary to each question. This will be displayed to the Agent during the survey conduction glossary key is present in the question.

Presence on the screen: Glossary is displayed as a button on the top right of the question pop up window in same line as the Question label

Procedure:

1. In the agent scripting screen, drag and drop a **Question** node
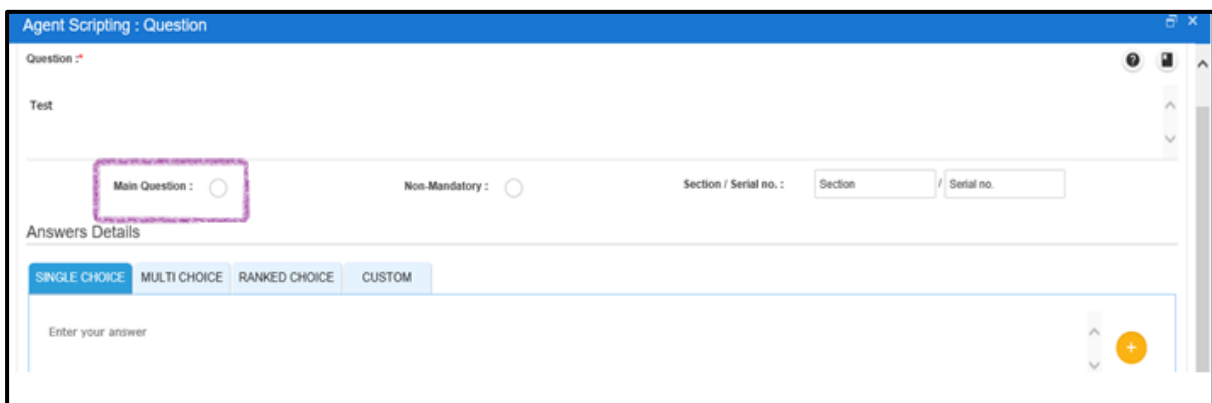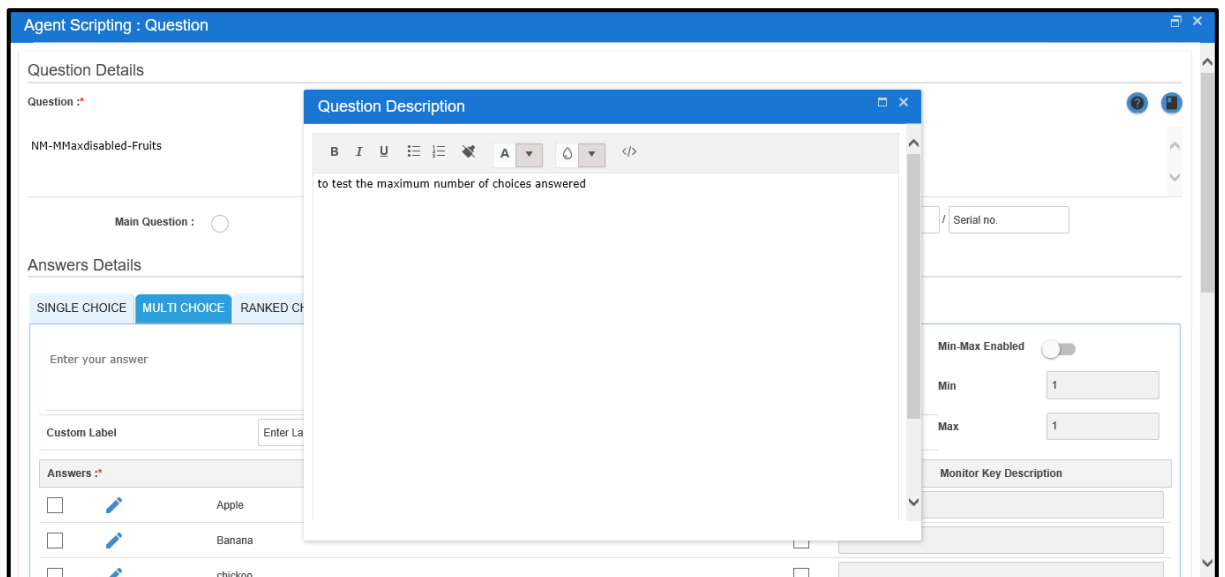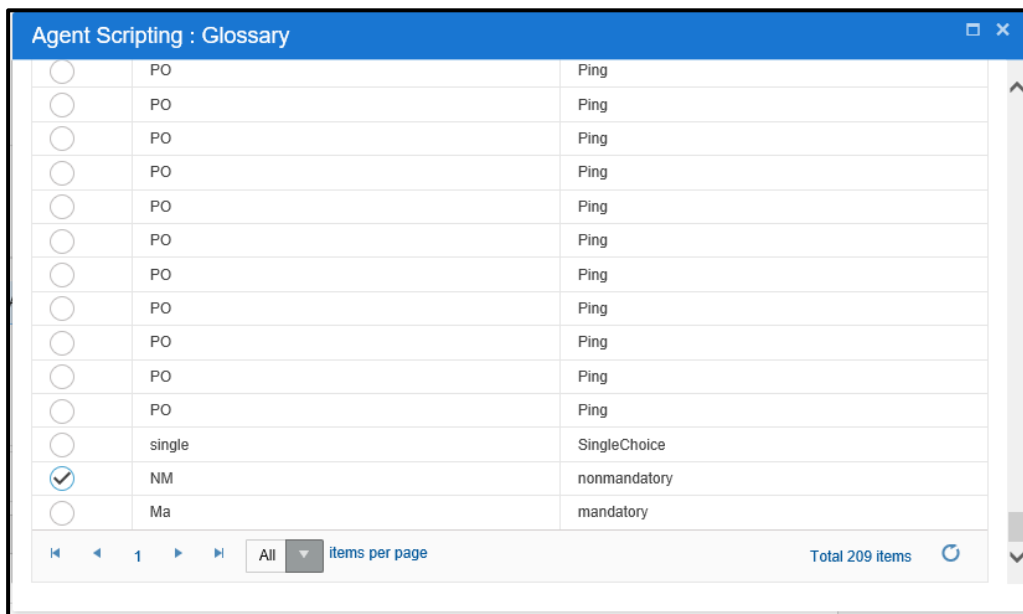2. Click on **Edit Details** of question node

3. **Agent Scripting: Question** pop up window is displayed

4. Click on the **Glossary** button on the top right

5. **Agent Scripting: Glossary** pop up window is displayed

6. check the glossary that has to be added to the question

7. Click on **Save**

8. Glossary will be added and the **Glossary** button colour will change to **purple**

Adding Answer to question

Answers of different type of choices can be added to a question. Answers can be single choice, multiple choice, rank the answers and custom answers with different type of data can be designed. To add these different type of answers, follow the procedure.

Add question with single choice answer

Procedure:

1. In the agent scripting screen, drag and drop a Question node

2. Click on edit question node

3. Agent Scripting: Question pop up window is displayed

4. In the Question field, enter the question that will be asked to the contact during the survey.

5. Select **Single Choice** option from the different answer types tab present in the **Answer Details** section

6. Enter the answers and Click on + button.

7. **Answers** will have the answers list with each choice having a **radio** button.
8. Single choice answer list can also have custom answers. Use the **Custom Label** field to specify the label name and **Data type of the label.**
9. to add Custom label, enter text in Custom Label field and choose its data type
10. **Answers** list individual answer choice can be edited or deleted.
11. Specify the comments for the Question in the **Comments** field.
12. Click **on Save.**

Add question with multiple choice answer

Procedure:

1. In the agent scripting screen, drag and drop a **Question** node
2. Click on **Edit details** question node
3. **Agent Scripting: Question** pop up window is displayed
4. In the **Question** field, enter the question to be asked to the contact.
5. Enable **Min Max** to set minimum and maximum answers to be answered by respondents during the survey conduction
6. Create the multiple choice answer list by entering the choices in **Multi Choice** text field. Click on **+** button.
7. **Answers** field will have this Answer list with each choice having a checkbox.
8. Multiple choice answer list can also have custom answers. Use the **Custom Label** field to specify the label name and **Data type** of the label.
9. Answers list individual answer choice can be edited or deleted.
10. Specify the comments for the Question in the **Comments** field.
11. Click on **Save.**

Add question with Ranked choice answer

Procedure:

1. In the agent scripting screen, drag and drop a **Question** node
2. Click on **Edit details** question node
3. **Agent Scripting: Question** pop up window is displayed
4. In the **Question** field, enter the question to be asked to the contact.
5. Create the Ranked choice answer list by selecting the **Rank** choice tab
6. Enable **Min Enabled** to set minimum answers to be answered by respondents during the survey conduction
7. enter the choices in **Rank Choice** answer text field. Click on + button.
8. **Answers** field will have the ranked choices Answer list and individual answers can be reordered
9. Specify the comments for the Question in the **Comments** field.

10. Click **on Save.**
11. The added question will appear in the Question Master table present below the **Question Details** section.

📌 **Note**: *Question with Rank choice answers cannot have a custom answer so custom answer label and data type fields will not be present for Rank choice.*

Add question with Custom choice answer

Procedure:

1. In the agent scripting screen, drag and drop a **Question** node
2. Click on **Edit details** in question node
3. **Agent Scripting: Question** pop up window is displayed
4. In the **Question** text field, enter the question to be asked to the contact
5. Create the Custom choice answer list by selecting the **Custom** tab
6. Use the **Custom Label** field to specify the label name and choose **Data type** from the drop- down list
7. click on **+** button.
8. Answer is added to the Answer list in the Answers field.
9. Specify the comments for the Question in the **Comments** field.
10. Click **on Save.**
11. The added question will appear in the Question Master table present below the **Question Details** section.

Note: Only one custom choice answer can be added to a question

Answers can only be edited and cannot be deleted. It can be deleted only when the all the connections to the answer node are deleted.

Adding Monitoring Keys to answer

Supervisor at times might require to monitor the answer responses' count. To facilitate this, monitoring keys and monitor key descriptions are unique features provided while designing the question. Let us see how a designer has to add this to an answer.

Presence on the screen: Monitoring keys is displayed as a checkbox next to each answer and Monitoring key description is a text field.

Only Single and Multi choice answers can have monitoring keys. Number of answers that can be monitored for a question and number of questions that can be monitored for a questionnaire is configurable.

Procedure:

1. In the agent scripting screen, drag and drop a **Question** node
2. Click on **Edit details** in question node
3. enter **question** and **answers**
4. Check the **Monitor** checkbox for the answers to be monitored
5. **Monitor Key description** is auto filled with the answer. You can change the Monitor key description to have more details.
6. Click on **Save**
7. Question will have the answers which can be monitored by the supervisor.

Mandatory/non mandatory question

A question can be mandatory or non-mandatory. An option is provided to make a question as mandatory or non mandatory when providing the question details. Below screenshot has the field highlighted.

During the survey, mandatory questions will not have the skip button. While the non-mandatory questions will have the skip button so that respondent can opt out of answering the question.

Single Choice mandatory question:

When a single choice question is made as mandatory, answers of the question have to be connected to the next node manually. For a mandatory question during the survey, agent will not be allowed to proceed to the next question without answering. These question's each answer can have different branching logic.

Single Choice non mandatory question:

When a single choice question is made as non-mandatory, all answers of the question will be connected to a single next node. For a non-mandatory question during the survey, agent will be allowed to skip the question and proceed to the next question.

Procedure:

1. In the agent scripting screen, drag and drop a **Question** node
2. Click on **Edit details** on question node
3. enter **Question** and single choice answers
4. select **Non-Mandatory** button
5. **Save** the question
6. Question and its answers are displayed in the Agent scripting screen
7. Connect one of the answers to next node based on the questionnaire branching
8. All the answers will get connected to the same next node

Single Choice mandatory question to non-mandatory:

A single choice question which is mandatory can be changed to non-mandatory. Let us see different examples of branching logic for the above.

Condition 1: Two answers and both of answers are connected to different next nodes. Question is changed from Mandatory to Non-Mandatory. Save the question.

Result: An error message is displayed "The answer of the question are connected to different nodes. Please try again after re-connection".
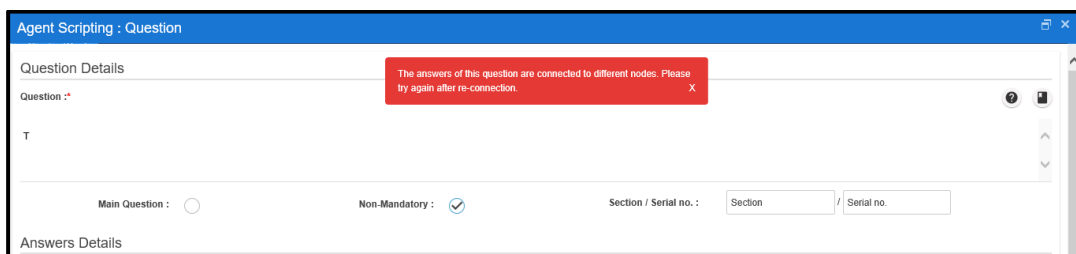
Condition 2: Two answers and one of the answers is connected to next node. Question is changed from Mandatory to Non-Mandatory. Save the question.

Result: No error message is displayed. By default, the unconnected answer will follow the path of the connected answer.

Multi/Rank Choice mandatory question:

When a multi/rank choice question is made as mandatory, all answers of the question will be connected to a single next node. This is the approach because respondent can choose any answer and also any number of answers.

For a mandatory question during the survey, agent will not be allowed to skip the question and proceed to the next question.

Procedure:

1. In the agent scripting screen, drag and drop a **Question** node
2. Click on **Edit details** on question node
3. enter question and multi/rank choice answers
4. do not select **Non Mandatory** button
5. **Save** the question
6. Question and its answers are displayed in the Agent scripting screen
7. Connect one of the answers to next node based on the questionnaire branching
8. All the answers will get connected to the same next node

Multi/Rank Choice non-mandatory question:

While designing the questionnaire, when a multi/rank choice question is made as non-mandatory, all answers of the question will be connected to a single next node. This is the approach because respondent can choose any answer and also any number of answers.

For a non-mandatory question during the survey, agent will be allowed to skip the question and proceed to the next question.

Procedure:

1. In the agent scripting screen, drag and drop a Question node
2. Click on Edit question node
3. enter question and multi/rank choice answers
4. select Non - Mandatory button
5. Save the question
6. Question and its answers are displayed in the Agent scripting screen
7. Connect one of the answers to next node based on the questionnaire branching
8. All the answers will get connected to the same next node

Custom Choice mandatory/non-mandatory question:

Custom choice question does not have any change while designing the questionnaire. Only change will be while the agent is conducting the survey. Agent will have the option to skip if it is non-mandatory.

Adding Demographic Keys to question

Demographic keys can be added to a question. Let us see how a designer has to add this to a question.

Presence on the screen: Demographic keys is displayed as a drop down above the answer list

Only Single choice answers can have demographic keys.

Procedure:

1. In the agent scripting screen, drag and drop a Question node
2. Click on Edit question node
3. enter question and answers
4. choose the Demographic key from the drop down
5. Save the question

Conditional Node

Conditional nodes are dragged and dropped to the agent scripting screen from the Node menu. Using this node, conditional branching logic can be designed. This node is always connected to a default node. Default node does not have any condition. Any answer that does not have the conditional rule will follow the default node path.

Conditional Exit Node

Conditional exit node cannot exist on its own. They are always connected to the leg of the conditional node. There are 2 conditional exit nodes. One is the Default node and other is the Conditional Rule node.

Conditional rule node is created when a rule is added to the conditional node. Otherwise conditional node will only have the Default node.

Adding conditional rule:

Procedure:

1. From the **node** menu, drag and drop a **conditional** node
2. Click on **edit** in the conditional node
3. **Agent Scripting: Conditional Node** pop up window is displayed
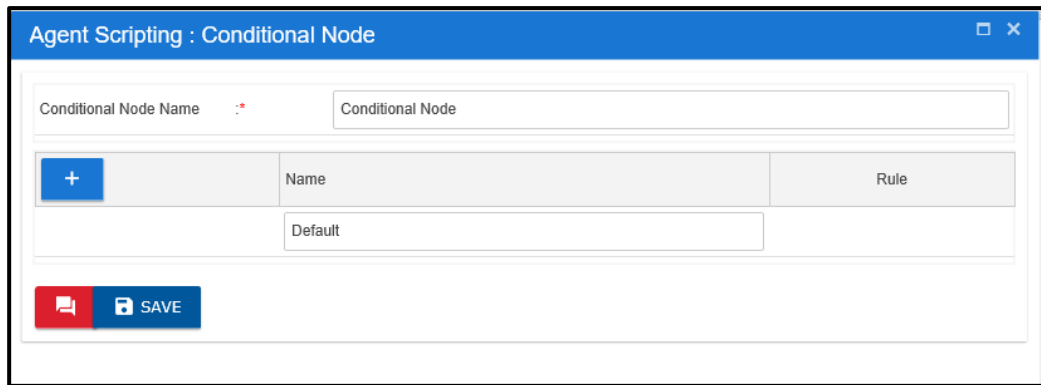
4. Click on **Add rule** ➕ button. A new rule row gets added to the conditional rule list

5. Enter the rule name in the **Rule name** text field

6. Click on **Set Rule** ▤ button present next to rule name. Set Rule button will be black when the rule is not set.

7. '**Agent Scripting: Set Rule'** pop window is displayed

8. Question list is displayed with all the single and multi choice questions of the questionnaire
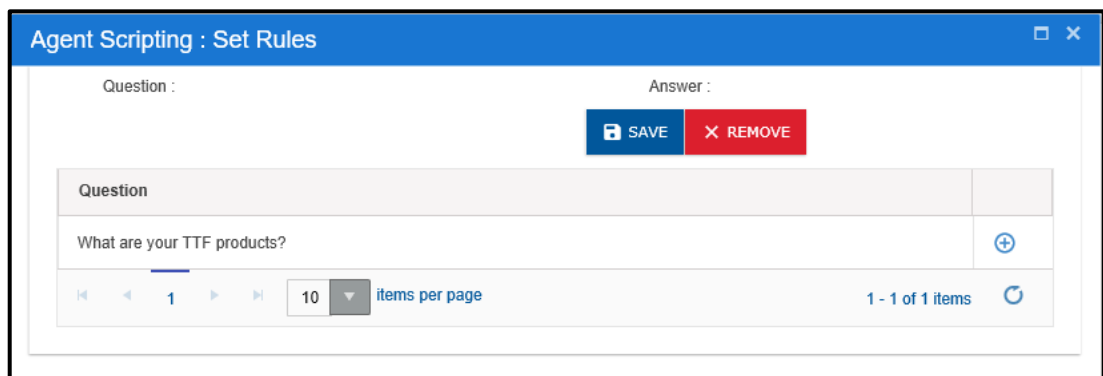
9. Click on the **Load question** ⊕ button

10. Selected question is displayed in the top question of the window. Its answers are displayed to the right of the question.

11. For a Single choice answers, radio buttons are available against each answers. You can select an answer for which rule has to be set.
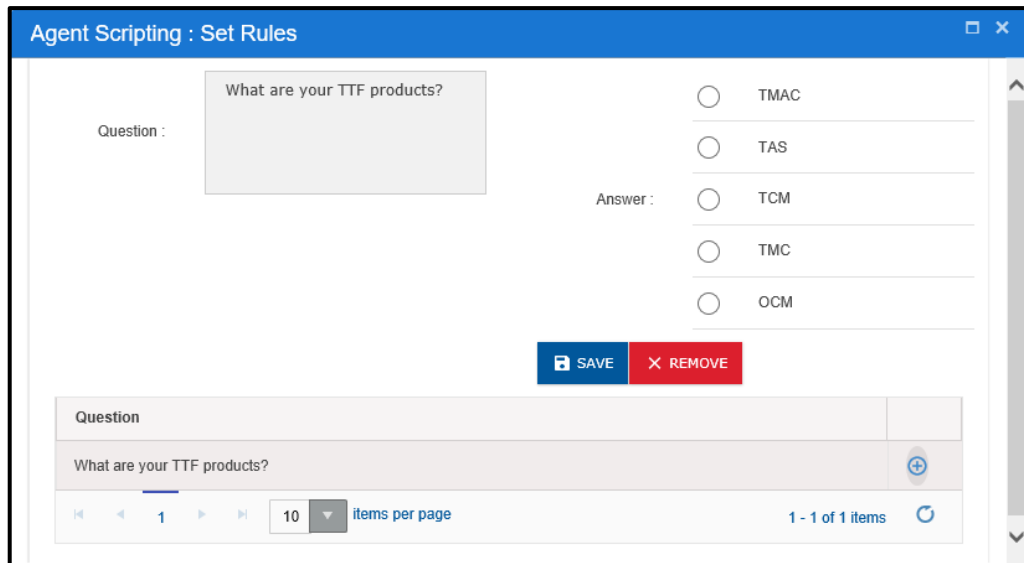
12. For Multi choice answers, checkbox is available against answer choice. You can choose select multiple answers as a condition rule to be met to move to the next node else it will follow the default node path.

13. Click on **Save** to set the rule

14. **Do you want to save?** confirmation pop up window is displayed. Click on **Yes**.

15. You will be taken to the **Agent Scripting: Conditional Node** window

16. **Set Rule** button will be **blue** after the rule is set
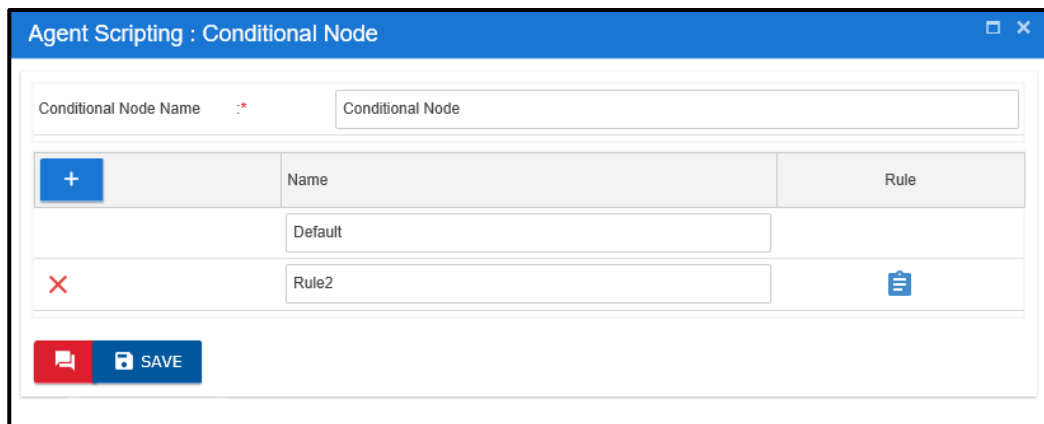
17. Click on **Add conditional rule** to add more rules.

18. Click on **Save** to save the conditional rules.

19. Conditional Rule gets added to the Conditional Node
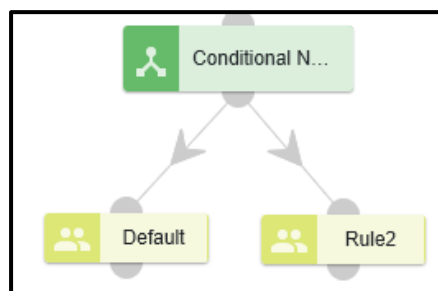
Disconnect Node

You can use this node to disconnect the questionnaire after a condition is met. There cannot be any connections from the Disconnect node. During the survey on the agent side, Survey wind up confirmation is displayed after the disconnect node is reached.

Adding a Disconnect Node

Procedure:

1. From the **node** menu, drag and drop a **Disconnect** node
2. Click on **edit** in the disconnect node
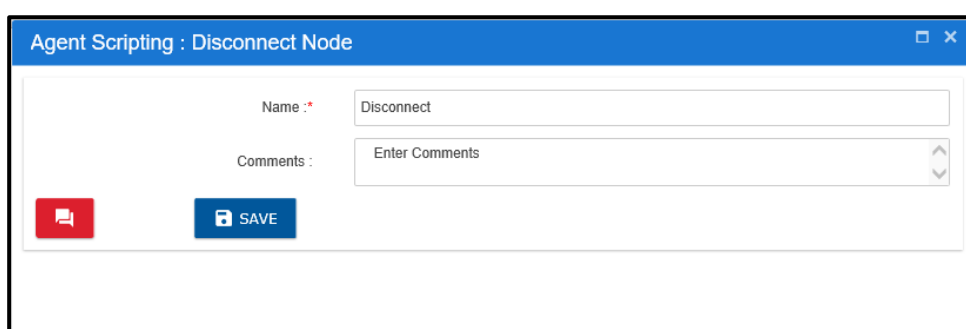3. **Agent Scripting: Disconnect Node** pop up window is displayed

4. Enter the **name** and **comments** for the node
5. Click on **Save** button

You can perform edit and delete operation on the Disconnect Node.

Disconnect Node field descriptions

This page is used to provide the details of the Entry node.

Field/Button	Description
Name	Text field to fill the Disconnect node name.
	Placeholder text is Disconnect and it is also the default text. If you do not want to name, you have the option to have the default text as the Entry Point name.
	Note: This is a mandatory field.
Comments	Enter the comments for the disconnect node
Save	Use this button to Save the Entry Point name
	Note:

Entry Node

Questionnaires might contain large number of questions. It becomes difficult to manage or fit the entire Questionnaire in a single tab. Such Questionnaires can be broken into smaller flows for better readability and to reduce frequent scrolls on the page. Each of these small flows are connected through the Entry and Exit Point node.

Adding an Entry Node

Procedure:

1. From the **node** menu, drag and drop a **Entry** node
2. Click on **edit** in the Entry node
3. enter **Entry Point** name
4. click on **Save**
5. **Entry Node** will get updated with the provided entry point name

You can perform edit and delete operation on the Entry Point Node.

Entry Node field descriptions

This page is used to provide the details of the Entry node.

Field/Button	Description
Entry Point	Text field to fill the Entry Point Name. Placeholder text is Entry Point and it is also the default text. If you do not want to name the Entry Point, you have the option to have the default text as the Entry Point name. Note: This is a mandatory field.
Save	Use this button to Save the Entry Point name Note:
Cancel	Use this button to cancel the entry made in the Entry Point Name field. In such a case the default text becomes the entry point name.

Viewing the Entry Point connections

Procedure:

1. hover on the Entry Point node and then click on **View Connections** icon
2. '**Following Connections found:**' pop up window with the Tab name and Entry Point name will be displayed

3. Tab name will have the tabs which are connected to this Entry Point. There can be multiple tab names and exit points connected to a single-entry point.

Deleting an Entry Point

Procedure:

1. Double click on each connection of the **Entry Point** and delete them individually.
2. When all the connections are broken then click on **delete details** icon on the node
3. Entry Point will be deleted. This Entry Point will not be available for setting entry point for any of the exit points.

Exit Point

Exit Node cannot be a source node. It is the last node of the flow in a tab. If there is an effort to set connection between Exit node to any of the nodes, an alert message 'Source cannot be an exit point. Exit point should not have any exits.' will be displayed.

Every Exit Point will be pointing to the next Entry Point. This navigation details are provided by editing the Exit Point and then setting the entry point.

Adding an Exit Node

Procedure:

1. From the **node** menu, drag and drop a **Entry** node
2. Click on **edit** in the Entry node
3. enter **Entry Point** name
4. click on **Save**
5. **Entry Node** will get updated with the provided entry point name

Exit Point can have only one Entry Point set. It cannot be set to multiple entry points. Set connections can be deleted.

Removing connection between Entry and Exit node

Procedure:

1. Click on **edit** in the **Exit** node
2. Click on **Remove connections** button.
3. **Are you sure you want to remove this Entry point connection**? confirmation message is displayed.
4. click **Yes.** The connection will be removed between the Exit Point and Entry Point.

5. **'Entry Point connection removed'** message will be displayed confirming the deletion.
6. If the **edit details** button is clicked again, **Set entry point** window will not have connection details. Also, **Remove connections** button will not be present.

Deleting an Exit Point

Exit point can be deleted from the questionnaire.

Procedure:

1. Double click on each connection of the Exit Point and delete them individually.
2. When all the connections are broken then click on **delete details** on the node
3. Exit Point will be deleted.

10. Node Connectivity

About Node Connectivity

Connection between nodes are established when the connector is connected from the leg of one node to the head of the other node. Each node can be connected to only a set of nodes.

| Start Node	End Node	Connection status (outgoing)	Connection status (incoming)
Question	Only to its own Answer node	connections to multiple Answer nodes of the same Question node	Single connection from any node
Answer	to another question node, disconnect node, Conditional node and Exit Point	Single connection to any of the nodes except Entry point	Incoming connection only from its question node
Conditional	only to its default node and conditional rule node	No outgoing connection from conditional node except for its own default node and rule node	Multiple connection to conditional node
Conditional rule	Question node, to another conditional node, Disconnect node and Exit Point	Single connection from the leg of the conditional rule node	Incoming connection only from its conditional node
Disconnect		No outgoing connection from Disconnect node	Multiple connection to Disconnect node
Entry Point	Question node, Conditional node, Exit Point and Disconnect node	Single connection from Entry point node	No incoming connection to Entry Point node
Exit Point		No outgoing connection from Exit Point node	Multiple connection to Exit Point node

11. Questionnaire Statuses

About Questionnaire Status

Each Questionnaire goes through change in its status based on the user activity on the Questionnaire. You can have access to the Questionnaire based on its status and your role. A Questionnaire undergoes six status changes before being Approved. Only Questionnaire in Approved status will be mapped to an intent.

Workflow of a Questionnaire

Newly created Questionnaire will be in the Draft status. It is the first stage of the Questionnaire. You create the Questionnaire and finalise it. You save the Questionnaire and sent it for approval.

Your Checker will login and load this questionnaire in Send for Approval status. Checker will review by providing his review comments. To edit the questionnaire, Checker will have to change the status to Checkerdraft. After the review, checker will save the questionnaire. If the questionnaire has to be updated based on the review comments, Checker will reject the Questionnaire. If the Questionnaire is as expected by the Checker, it will be approved by him.
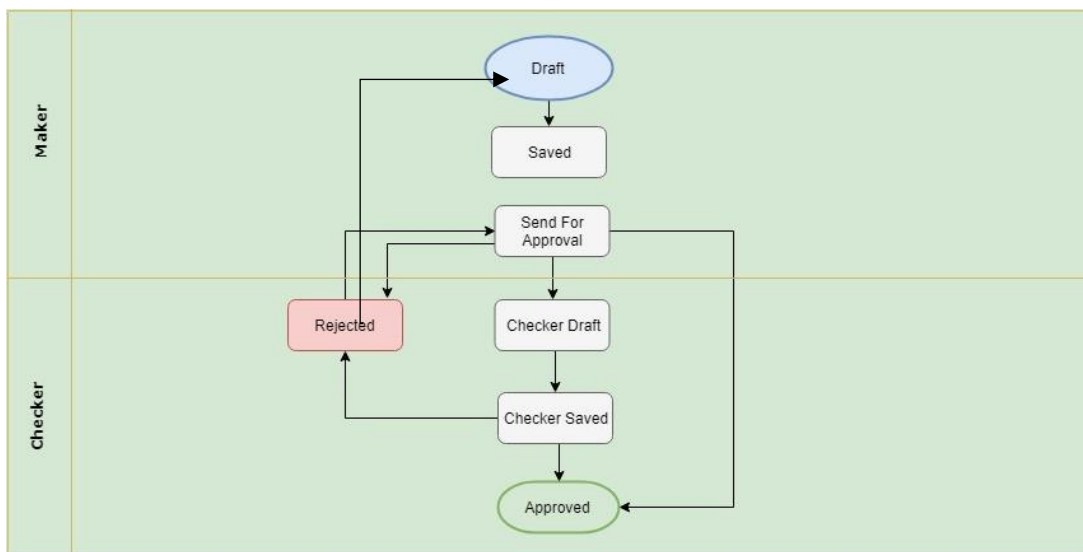
Below table provides information on the role and Questionnaires that can be accessed by each role.

| Questionnaire Status	Maker	Checker	Previewer
Draft	Yes	No	Yes
Saved	Yes	No	Yes
Send For Approval	Yes	Yes	Yes

Checker Draft	Yes	Yes	Yes
Checker Saved	Yes	Yes	Yes
Rejected	Yes	Yes	Yes
Approved	Yes	Yes	Yes

Detailed description of Questionnaire Status: Draft

Newly created Questionnaire will be in Draft status. Questionnaire can be edited only when its status is Draft. Maker can delete a Questionnaire whose status is 'Draft'. Questionnaire details will not be saved when it is in Draft status. You have to save it at frequent intervals to save the changes.

Only Maker has the option to change the status of the Questionnaire to Draft. Status can be changed to Draft only from Saved status and this can be done by clicking on **Edit Questionnaire** button. Also, you can add, delete or edit a tab only when Questionnaire is in draft status.

Questionnaire whose status is **Draft** cannot be accessed by another maker and edited. A lock icon will be displayed for Questionnaires which are currently being edited by another maker. This icon will be next to the status field in the main menu bar. Only after saving a Questionnaire by the current maker, another maker can access that Questionnaire and make changes.
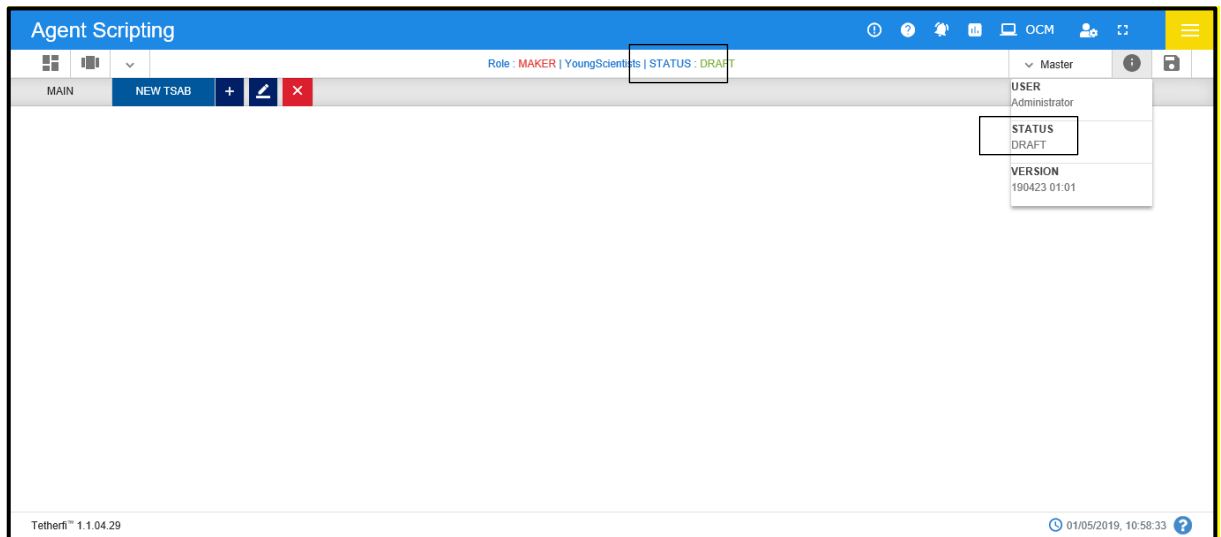
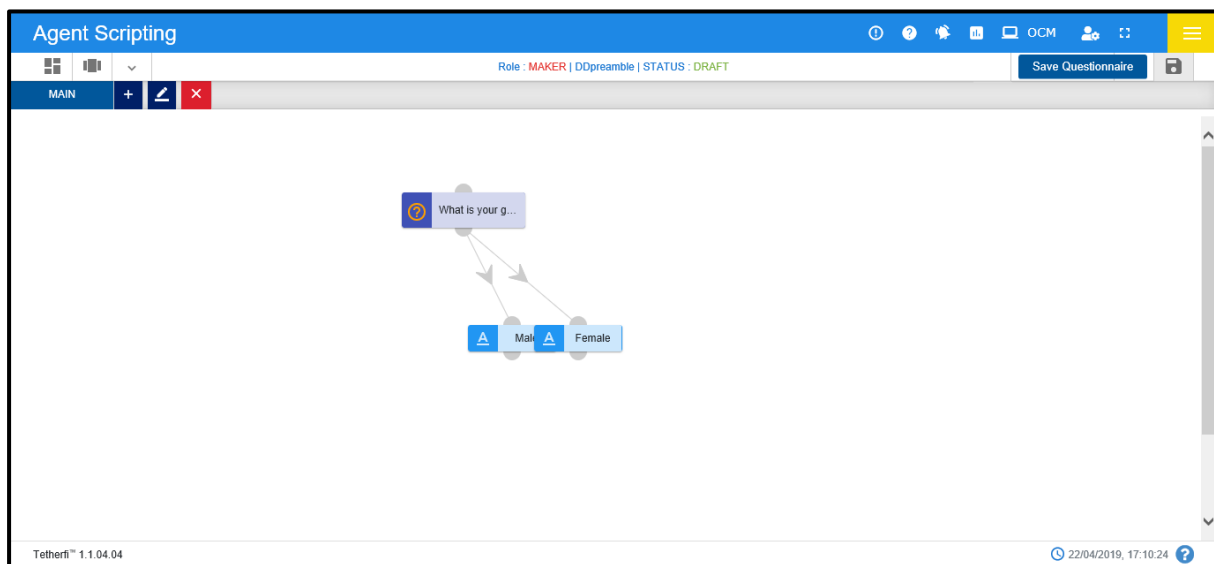## Detailed description of Questionnaire Status: Saved

Questionnaire can move to the Saved status only from the Draft status. Saved Questionnaire can be accessed by another Maker (other than owner). This user will have to change the status of the Questionnaire to Draft and then edit the Questionnaire.

📌 **Note**: Only Maker has the option to change the status of the Questionnaire to Saved.

Changing the Questionnaire status from Draft to Saved

Procedure:

1. In the Menu bar, click on the **Configure Questionnaire** menu button
2. Select the Questionnaire in **Draft** status from the drop-down list that has to be saved
3. In the menu bar, click on the **Save Questionnaire** button on the right side of the menu bar
4. Enter the comments in the **Comments** pop up window
5. Click on **Save Questionnaire** button
6. Status of the Questionnaire changes to **Saved.**
7. Status change will occur in the status field in **Information** menu, status field in **Dashboard,** Questionnaire status field in **Menu bar.**

Detailed description of Questionnaire Status: Send for Approval

All the Questionnaires created by you as a Maker must be approved by the Checker. You have to send the Questionnaire to Checker after finalising the Questionnaire. Checker will be able to review the Questionnaire only when you send the Questionnaire for Approval. You can move the Questionnaire to the **Send For Approval** status from the **Saved** status. You will not be able to see the Questionnaire in the Agent Scripting screen after the Questionnaire status changes to SendForApproval.

📌 **Note**:

Only Maker has the option to change the status of the Questionnaire to **SendForApproval**.

Maker cannot edit or delete a Questionnaire whose status is **SendForApproval**.

Changing the Questionnaire status from Saved to SendForApproval

Procedure:

1. In the Menu bar, click on the **Configure Questionnaire** menu button
2. Select the Questionnaire in **Saved** status from the drop-down list that has to be Sent for Approval
3. In the menu bar, click on the **Send For Approval** button on the right side of the menu bar
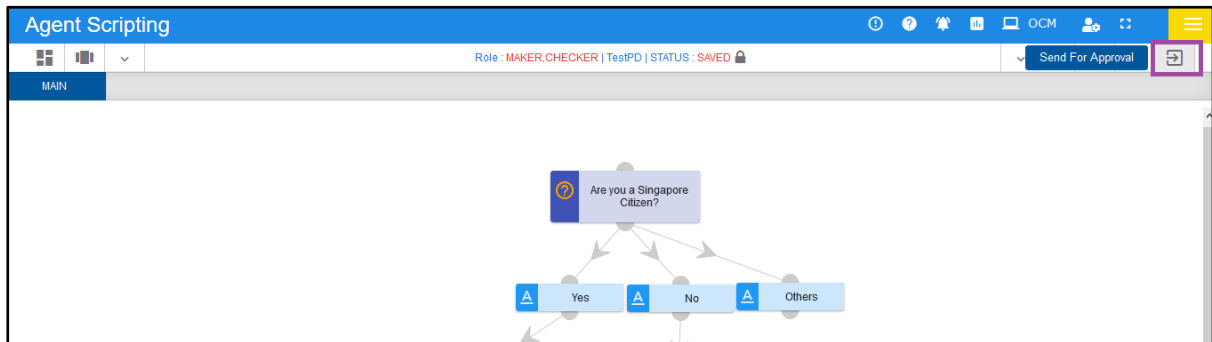
4. Enter the comments in the **Comments** pop up window
5. Click on **Send For Approval** button
6. Status of the Questionnaire changes **Saved** to **SendForApproval.** Status change will occur in the status field in **Information** menu, status field in **Dashboard,** Questionnaire status in **Menu bar.**

Detailed description of Questionnaire Status: Checker Draft

Checker must edit the Questionnaire to provide the review comments. To edit the Questionnaire, Questionnaire status must be changed from Send for Approval to Checker Draft. Only checker comments fields in the nodes will be editable in this status. No other modification to the Questionnaire like adding, deleting or editing a node or tab is possible.
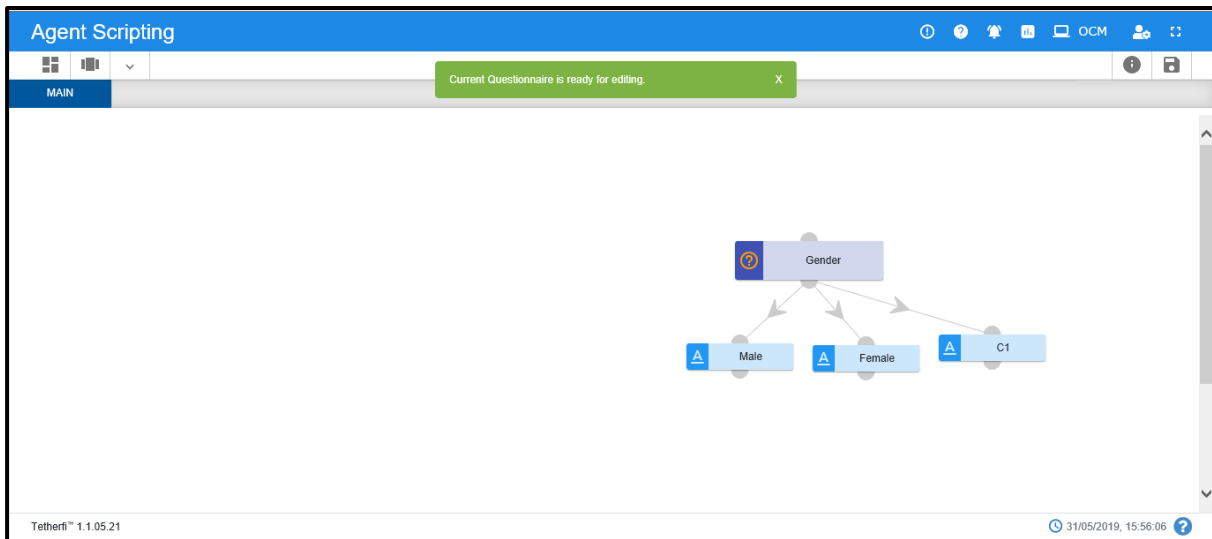
📌 *Note:*

Maker cannot edit or delete a Questionnaire whose status is '**CHECKERDRAFT**'.

Changing the Questionnaire status from SendForApproval to CheckerDraft

Procedure:

1. Checker is logged into the application
2. In the Menu bar, click on the **Configure Questionnaire** menu button
3. Select the Questionnaire to be reviewed in **Send For Approval** status from the drop-down list
4. Click on the **Edit Questionnaire** button

5. **Current questionnaire is ready for editing** message is displayed.

6. Status of the Questionnaire changes from **SendForApproval** to **CheckerDraft.** Status change will occur in the status field in **Information** menu, status field in **Dashboard,** Questionnaire status field in **Menu bar.**

📌 *Note:*

Only Checker has the option to change the status of the Questionnaire to **CheckerDraft.**

Detailed description of Questionnaire Status: Checker Saved

You as a Checker have to save the Questionnaire after providing the review comments. A Questionnaire cannot be approved or rejected if the status of the questionnaire is in Checker Draft status. Its status has to be moved to Checker Saved status.

Changing the Questionnaire status from CheckerDraft to CheckerSaved

Procedure:

1. Checker is logged into the application
2. In the Menu bar, click on the **Configure Questionnaire** menu button
3. Select the Questionnaire in **Checker Draft** status from the drop-down list
4. In the menu bar, click on the **Saved Questionnaire** button
5. Enter the comments in the **Comments** pop up window
6. Status of the Questionnaire changes from **CheckerDraft to CheckerSaved.** Status change will occur in the status field in **Information** menu, status field in **Dashboard,** Questionnaire status field in **Menu bar.**

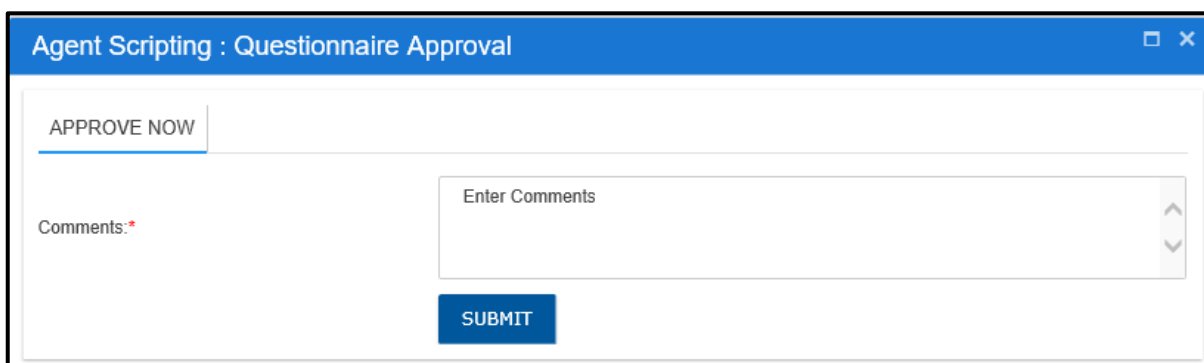# Detailed description of Questionnaire Status: Approved

You as a Checker after providing your review comments will approve the Questionnaire. Approved is the final status of the Questionnaire. This Questionnaire cannot be deleted. As a Maker, if you want to modify an Approved Questionnaire then you can edit the Questionnaire. A new draft version of the Questionnaire gets created with all the details from the approved version.

At any point of time, Questionnaire can have only one Approved version and another version in any of the status other than the Approved status.

## Changing the Questionnaire status from SendForApproval to Approved

Procedure:

1. Checker is logged into the application

2. In the Menu bar, click on the **Configure Questionnaire** menu button

3. Select the Questionnaire in **SendForApproval** status from the drop-down list

4. In the menu bar, click on the **Approved Questionnaire** menu

5. **Agent Scripting: Questionnaire Approval** pop up window is displayed

6. Enter the comments and click on **Submit**

7. Status of the Questionnaire changes from **CheckerDraft to CheckerSaved.** Status change will occur in the status field in **Information** menu, status field in **Dashboard,** Questionnaire status field in **Menu bar.**

Changing the Questionnaire status from CheckerSaved to Approved

Procedure:

1. Checker is logged into the application

2. In the Menu bar, click on the **Configure Questionnaire** menu button

3. Select the Questionnaire in **Checker Saved** status from the drop-down list

4. In the menu bar, click on the **Approve Questionnaire** button

5. **Agent Scripting: Questionnaire Approval** pop up window is displayed

6. Enter the comments and click on **Submit**

7. Status of the Questionnaire changes from **CheckerSaved to Approved.** Status change will occur in the status field in **Information** menu, status field in **Dashboard,** Questionnaire status field in **Menu bar.**

Creating a new draft Questionnaire from an Approved Questionnaire

Procedure:

1. Maker is logged into the application

2. In the Menu bar, click on the **Configure Questionnaire** menu button

3. Select the Questionnaire in **Approved** status from the drop-down list

4. In the menu bar, click on the **Edit Questionnaire** menu

5. Below pop up confirmation message gets displayed.

Current Questionnaire is in APPROVED state. Do you want to create a new version of this Questionnaire ?

NO   YES
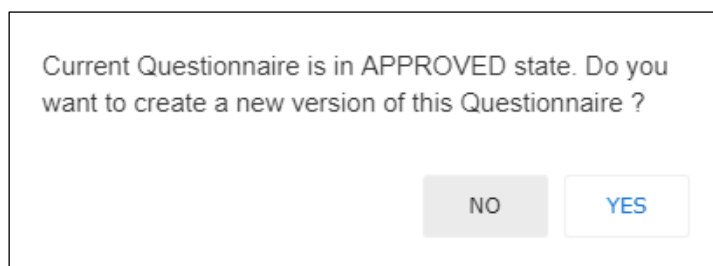
6. Click on **Yes** to create a new version or **No** if you don't want to create a new version.

7. Status of the Questionnaire changes from **Approved to Draft.** Status change will occur in the status field in **Information** menu, status field in **Dashboard,** Questionnaire status field in **Menu bar.**

A new version of the questionnaire gets created here. Version of the questionnaire will be of the format 190527-01.01

Detailed description of Questionnaire Status: Rejected

Rejected questionnaire cannot be used for conducting a survey. Maker has to work on the questionnaire review comments and make required changes. Questionnaire has to again go through the Checker review till the checker approves the questionnaire.

Changing the Questionnaire status from SendForApproval to Rejected

Procedure:

1. Checker is logged into the application

2. In the Menu bar, click on the **Configure Questionnaire** menu button

3. Select the Questionnaire in **Checker Draft** status from the drop-down list

4. In the menu bar, click on the **More Menu** on the right side of the menu bar

5. Click on the **Saved Questionnaire** menu

6. Enter the comments in the **Comments** pop up window

7. Click on **Save Questionnaire** button

8. Status of the Questionnaire changes from **CheckerDraft to CheckerSaved.** Status change will occur in the status field in **Information** menu, status field in **Dashboard,** Questionnaire status in **Menu bar.**

Changing the Questionnaire status from CheckerSaved to Rejected

Procedure:

1. Checker is logged into the application
2. In the Menu bar, click on the **Configure Questionnaire** menu button
3. Select the Questionnaire in **Checker Draft** status from the drop-down list
4. In the menu bar, click on the **More Menu** on the right side of the menu bar
5. Click on the **Saved Questionnaire** menu
6. Enter the comments in the Comments pop up window
7. Click on **Save Questionnaire** menu

Status of the Questionnaire changes from **CheckerSaved to Rejected.** Status change will occur in the status field in **Information** menu, status field in **Dashboard,** Questionnaire status field in **Menu bar.**

12. Questionnaire Creation

Let us see the procedure to create a questionnaire.

Procedure:

1. In the top menu bar, click on **Configure Questionnaire** menu
2. Configure Questionnaire pop up window is displayed
3. Follow the *Creating a Questionnaire* procedure
4. you will land on the Agent scripting canvas
5. start designing the questionnaire as per the survey questions provided
6. drag and drop the required *Question Node* to create questions with branching logic
7. *Adding Preamble* to question to the question
8. add description to the question
9. add glossary to the question
10. add monitoring keys to the answers and enter the monitoring descriptions if it is a single or multiple choice answer
11. add demographic keys to the question node if only it's a single choice answer
12. insert *Conditional Node* if navigation to next requires conditions to be met
13. for lengthy questionnaire, break the questionnaire into multiple tab
14. follow the *Add Tab* procedure
15. tabs are connected through *Exit Point* and entry nodes. Exit node of a tab is connected to Entry node of another tab. This ensures connection between 2 tabs.
16. *Save the questionnaire*
17. *Send the questionnaire* for approval
18. Now the questionnaire will be displayed in the Check dashboard
19. As a Checker, you will login to TAS with his credentials
20. You will click on *Preview questionnaire* in Dashboard
21. Click on the edit questionnaire button to *change the status of the questionnaire to Checker Draft*
22. start editing the questionnaire to provide your review comments.
23. Save the questionnaire to *change the status to checker saved*
24. You might have rejected the nodes with your review comments. These nodes must be corrected by Maker so *reject the questionnaire*.
25. If you do not find any issues with the questionnaire, approve it and *questionnaire status changes to approved*.

13. Conduct Survey

About Survey

Survey questions are designed in TAS application. These questions are designed in a questionnaire. Approved Questionnaires are then displayed during the survey provided the intent of the questionnaire and the campaign are the same. Operator will conduct the survey. Based on the branching logic designed, the questions will be displayed to the Operator. Operator can complete the survey in one call or make multiple calls by resuming the earlier incomplete survey questionnaire.

Survey Question display on Agent side:

TAS application is integrated with TCM and TMAC application.

Initiate a Survey call:

Procedure:

1. add contacts in TCM application
2. play the campaign
3. calls are dialed out to the contact and the agent with the campaign skill receives the call
4. Respondent is conferenced
5. Both Agent and Respondent are connected
6. Survey pop up window is displayed to the Agent

Survey description display

Description added while creating the questionnaire will be displayed as a pop up window when the survey pop up window is displayed.

On clicking the **Continue to survey** button, survey questions will be displayed to the Agent.
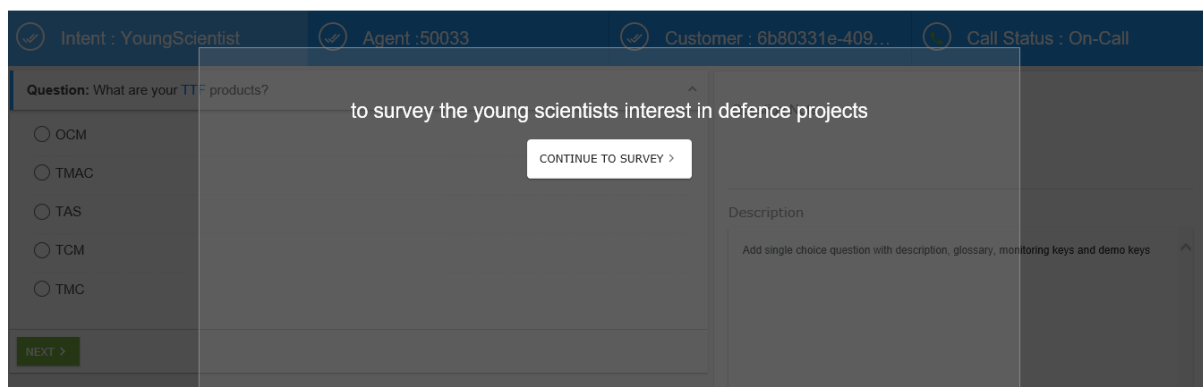
Survey Preamble display

Whilst designing the survey question if preamble is added then it will be displayed to the Agent before the question is displayed. Agent has to read the preamble and follow the same for the next question or a set of questions.

On clicking the **Continue to survey** button, survey questions will be displayed to the Agent.
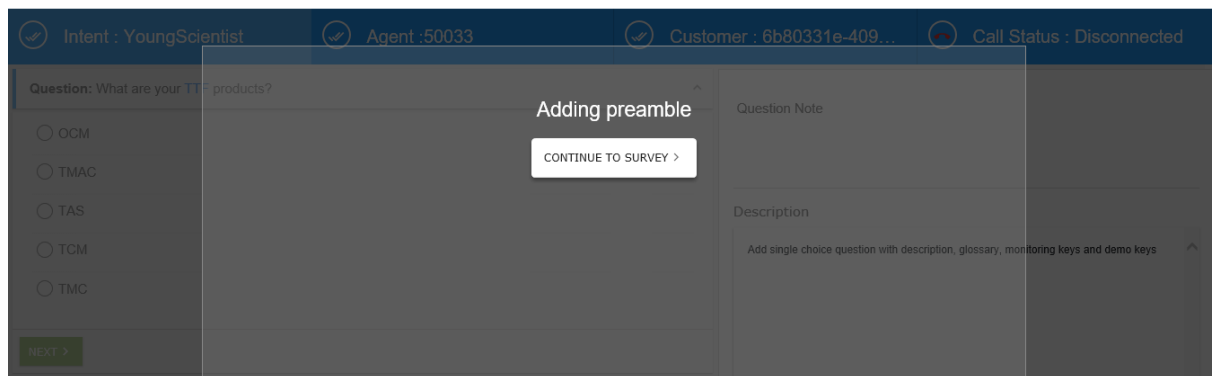
Survey Question description display

Question description provided while designing the question will be displayed on the right side under **Description** section. Each question's description will be displayed in this section when the question is posed to the agent. Below screenshot highlights the description section.
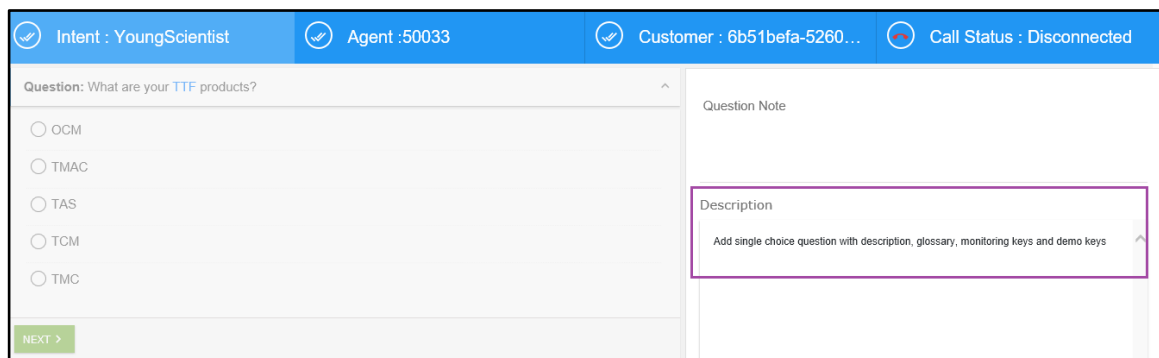
Glossary display in question

Glossary key will be highlighted in blue colur when it is present in a question.

On clicking the highlighted word, glossary will be displayed.
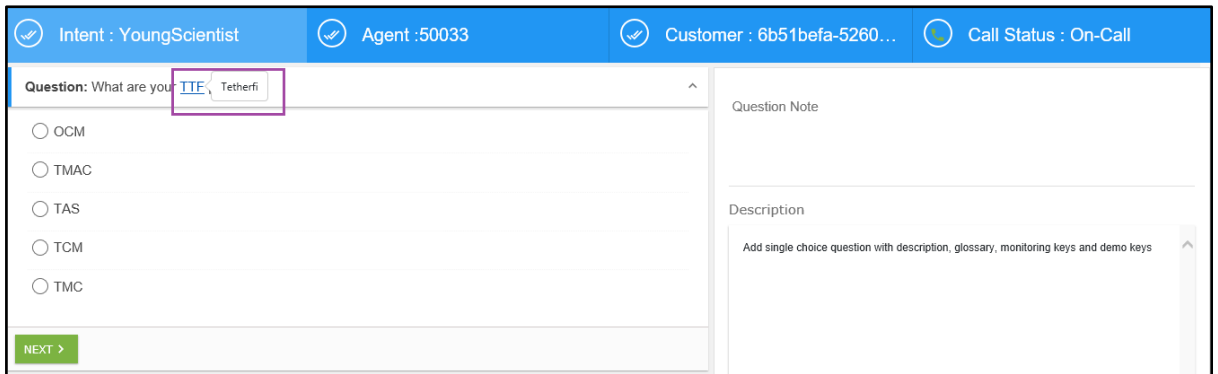
Single choice mandatory question display

Question with single choice answers will be displayed with radio button against each answer. Mandatory question will have only **Next** button.
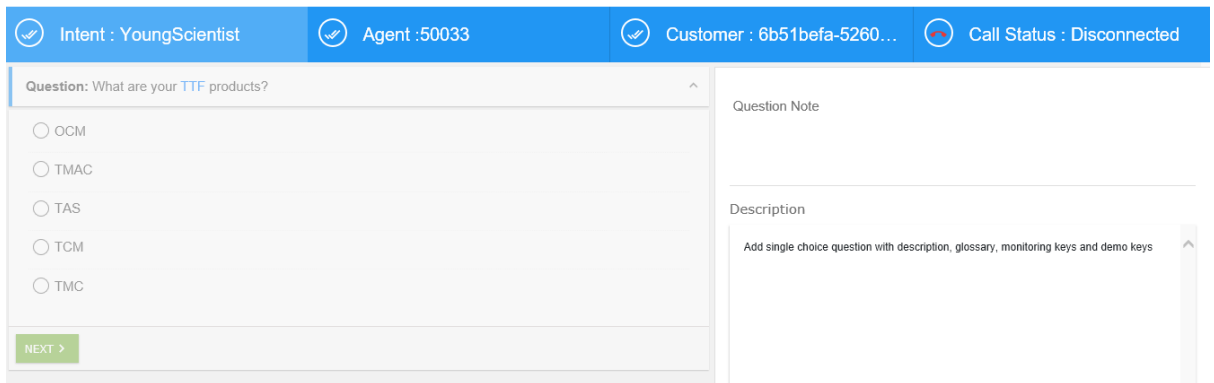
Agent will not be able to proceed without answering mandatory question.
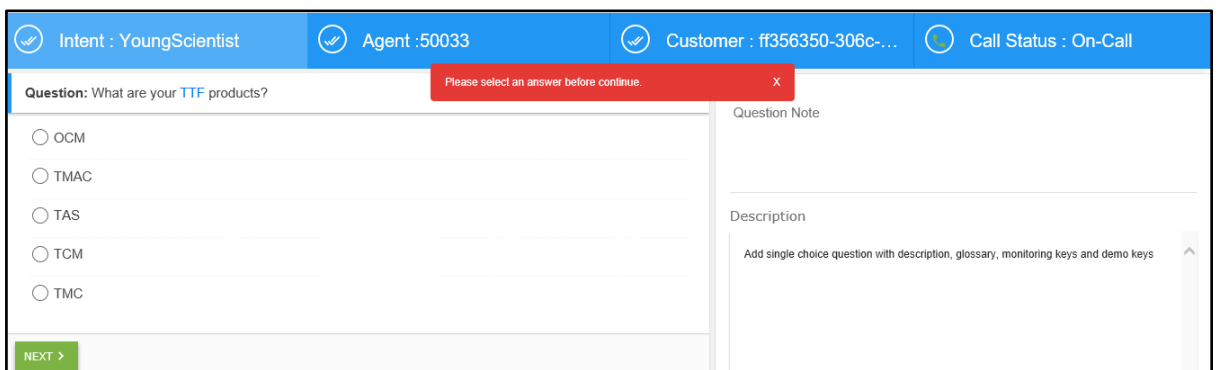
Rank choice non - mandatory question display

Non-mandatory Rank choice question will have **Skip** button as the respondent can choose not to answer the question.
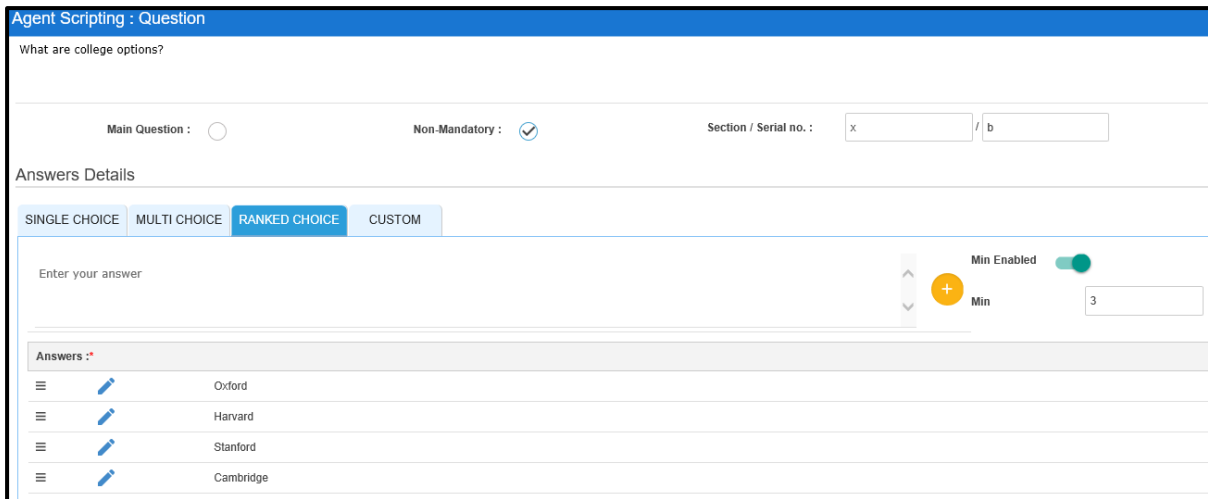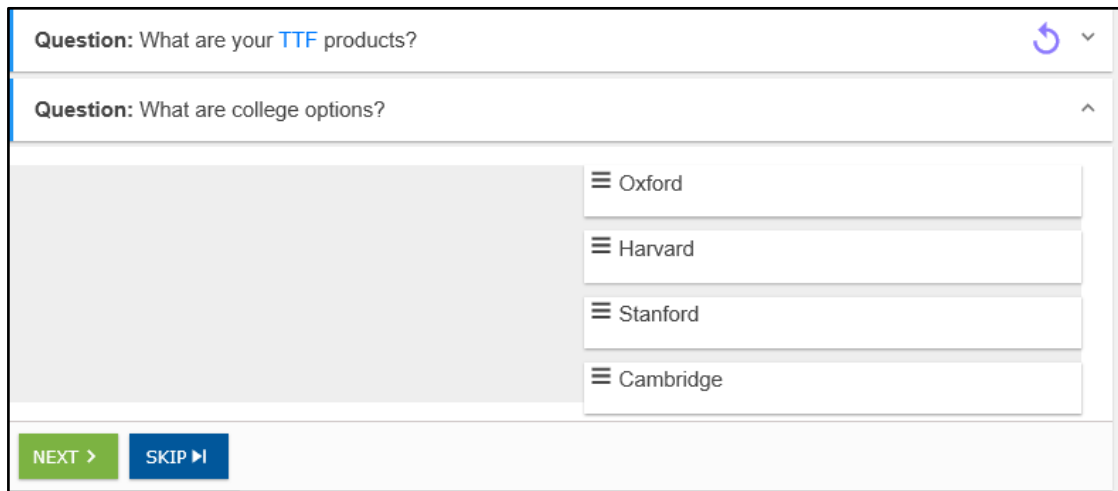
Figure 13.1 – Ranked choice question design

Figure 13.2 – Ranked choice question during survey

Min-enabled Rank choice question will have the answer choices in a list on the right side of the answer block. Based on the respondent's response, agent will drag and drop the answers to the left of the answer block.

In case the respondent answers a question but does not respond to the minimum number of ranked choices expected as per the question design, an error message will be displayed as shown below. Agent will not be able to proceed to the next question by clicking the **Next** button.
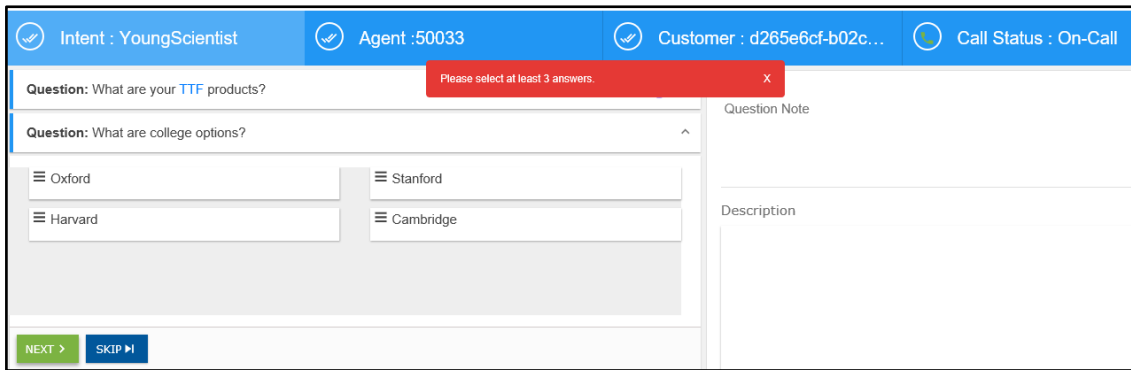
Figure 13.3 – Ranked choice question during survey

However, if the respondent decides to skip the question, agent can click on **Skip** and move to the next question.

A skipped question can be identified with 🚫.
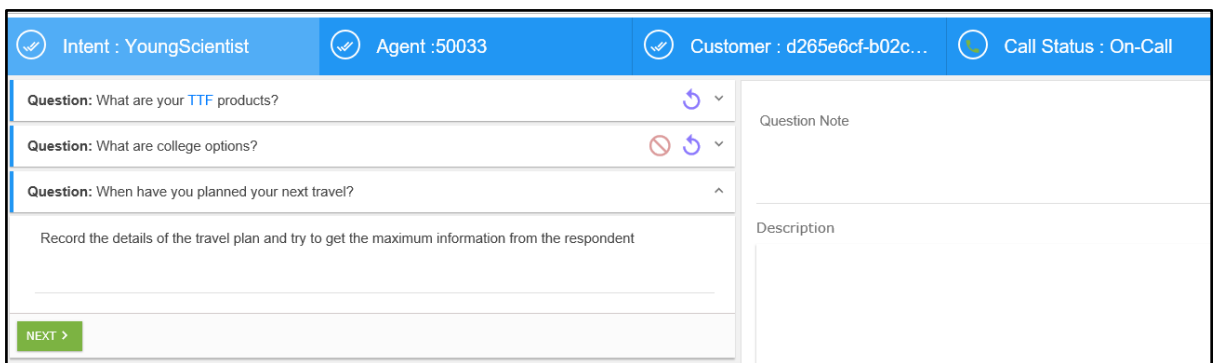
Figure 13.4 – Ranked choice question during survey

Resetting the answered question

Respondent has already answered a question and moved to the next question. Respondent can change the answer of the previous questions by resetting the question.

To reset the question, click on ↺ button present on the right of the question which has to be reset.
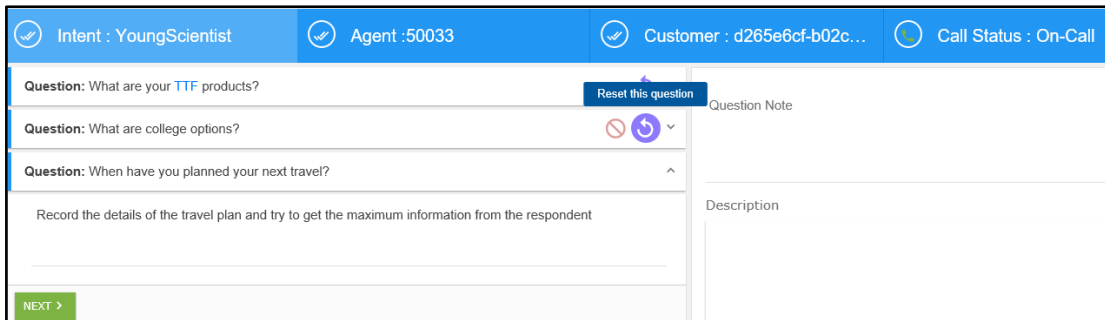
Figure 13.5 – Ranked choice question during survey

All the questions from the reset question onwards have to answered again by the respondent. This is because the respondent might choose an answer which will have a different branching logic from the earlier answer.

Consider the screenshot below for explaining the reset procedure.

Mandatory Custom choice question

Custom choice question that is designed to be a mandatory question will have the **Next** button Application will throw an error message if the operator tries to move to the next question without providing answer.
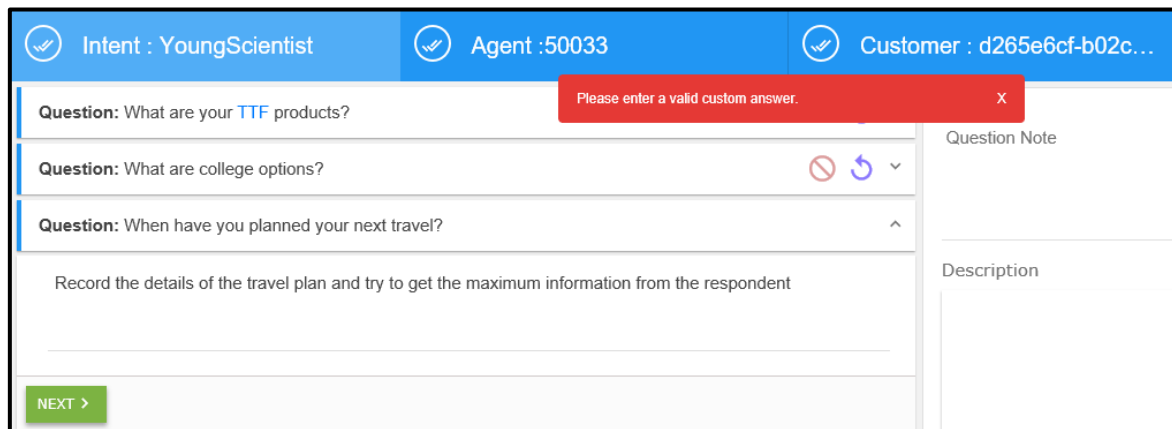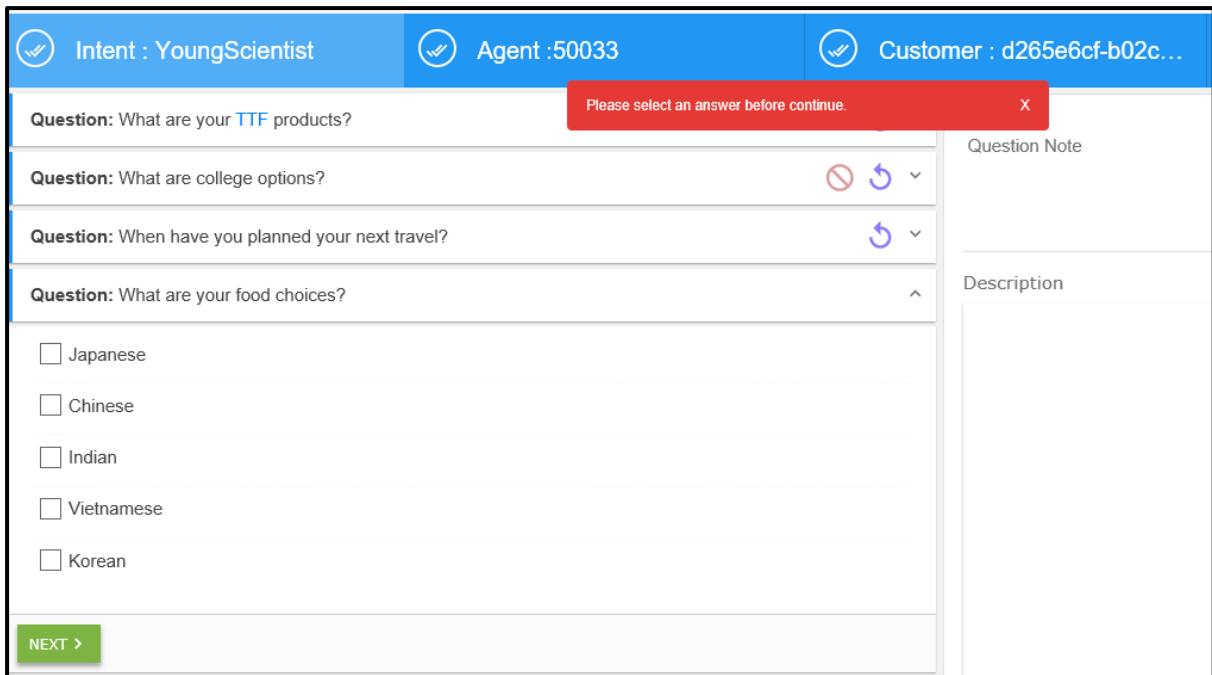

Figure 13.6 – Ranked choice question during survey

Mandatory multi choice question with Min-Max enabled

Multi choice question that is designed to be a mandatory question will have the **Next** button Application will throw an error message if the operator tries to move to the next question without providing answer.

Figure 13.7 – Ranked choice question during survey

Non Mandatory multi choice question with min max disabled

For a non-mandatory multi choice question, both **Next** and **Skip** buttons will be available. Respondent can choose to skip the question.

Respondent answers the question which is designed with Min-max disabled then for such a question, minimum 1 answer has to be provided by the respondent.
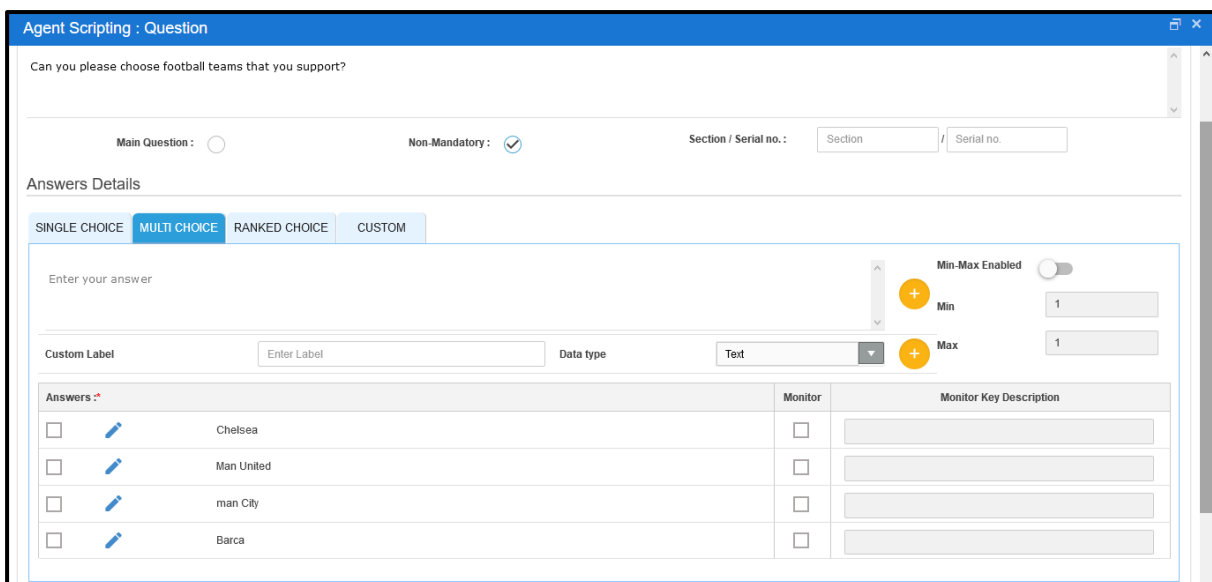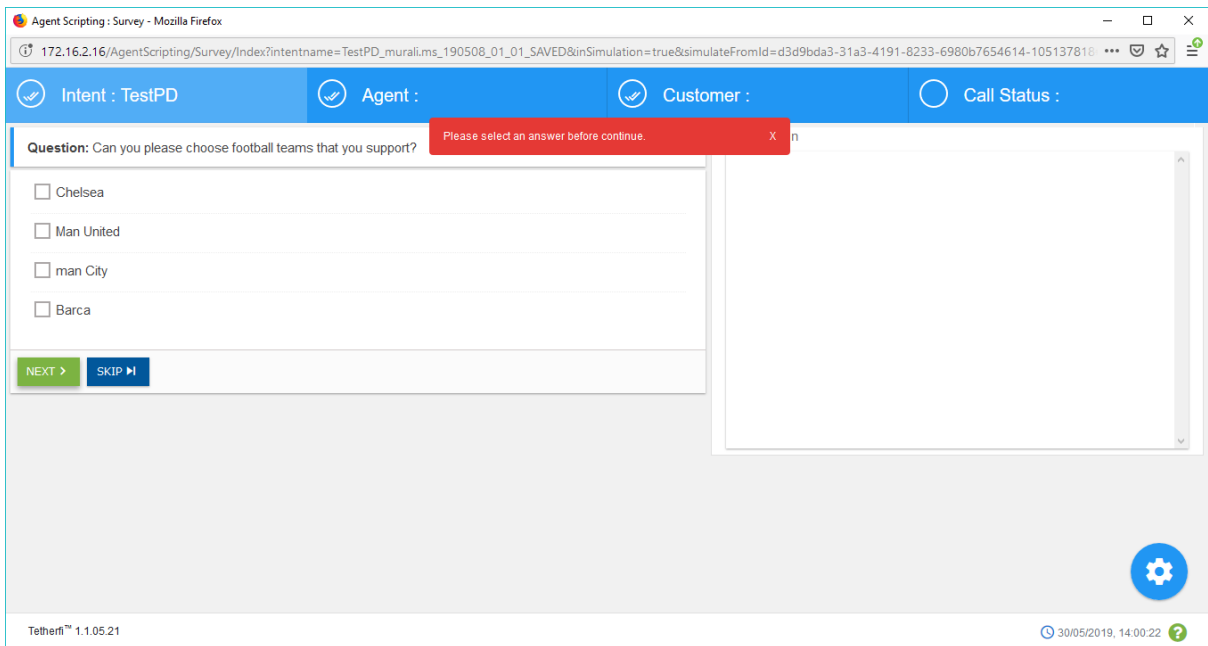

Figure 13.8 – Ranked choice question during survey

Figure 13.9 – Ranked choice question during survey
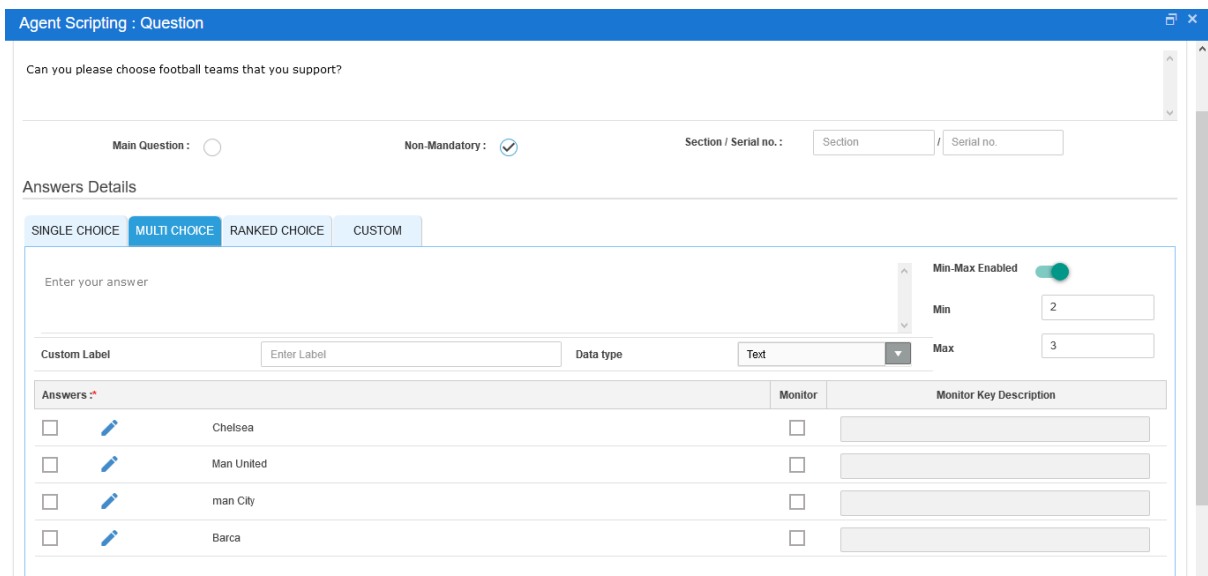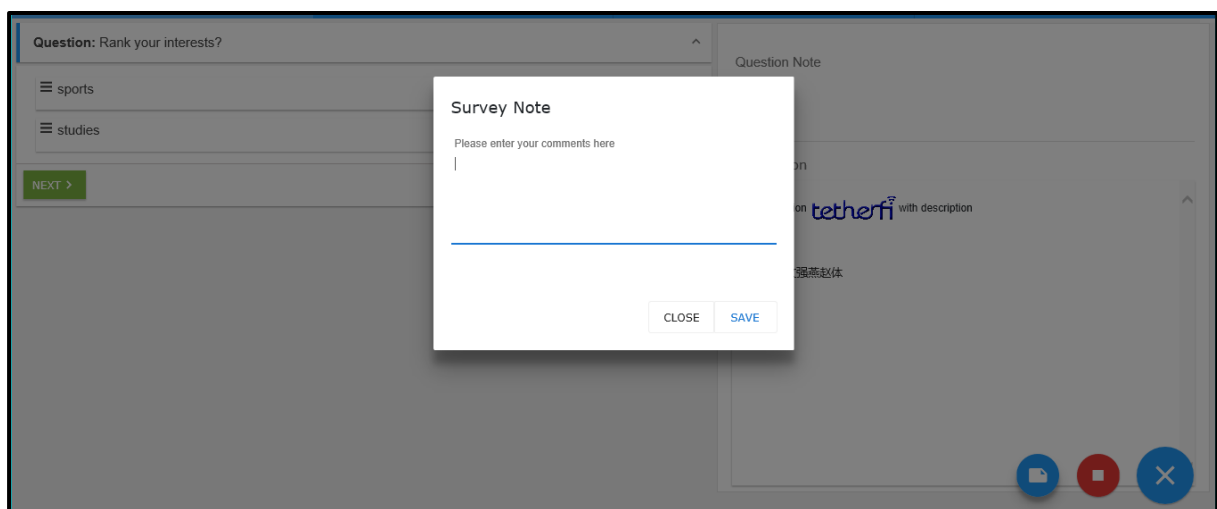

Figure 13.10 – Ranked choice question during survey

Multiple choice question with glossary and question description

Survey Note

Operator is provided with an option to provide notes during the survey. Survey Note button is provided at the bottom right of the survey window. On click of this button, Sur

Winding up survey

On answering the last question of the survey, survey wind up pop window will be displayed. Operator will have to confirm the survey end by either clicking **Yes** or **No.**
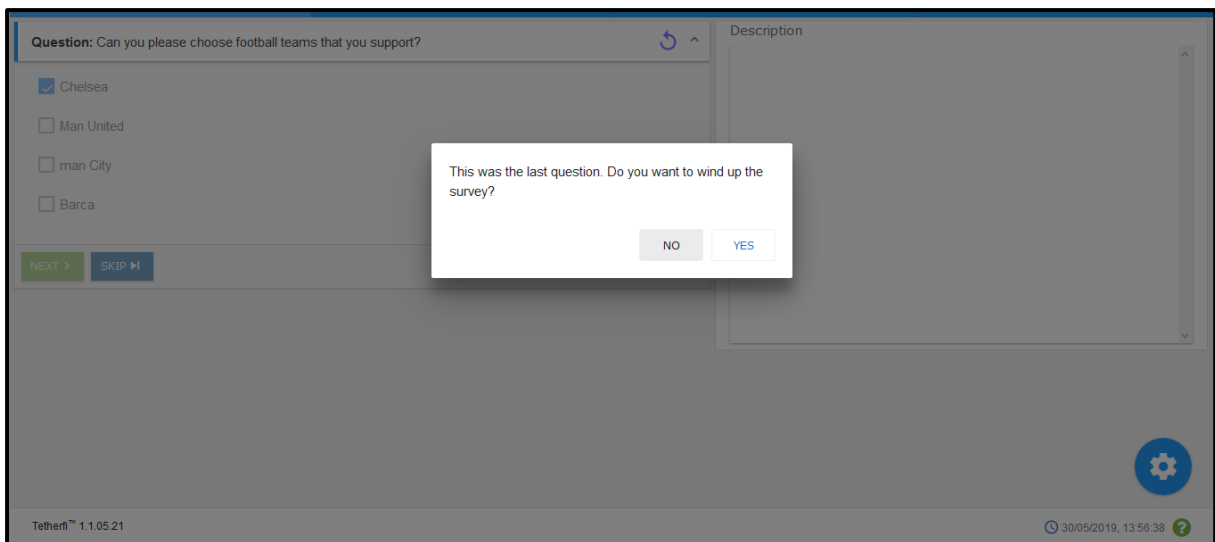
Figure 13.11 – Ranked choice question during survey

Procedure of survey wind up on confirming the wind up:

1. Operator enters the response of last question
2. **This was the last question. Do you want to wind up the survey?** Confirmation message with **Yes** and **No** button will be displayed.
3. When the operator chooses **Yes**, then the survey wind up page will be displayed.
4. **Mark as completed** will be **checked** and **Reason** will be **completed**
5. Both the fields will be disabled and operator will not be able to make changes
6. Operator can provide the **Survey Note** if required
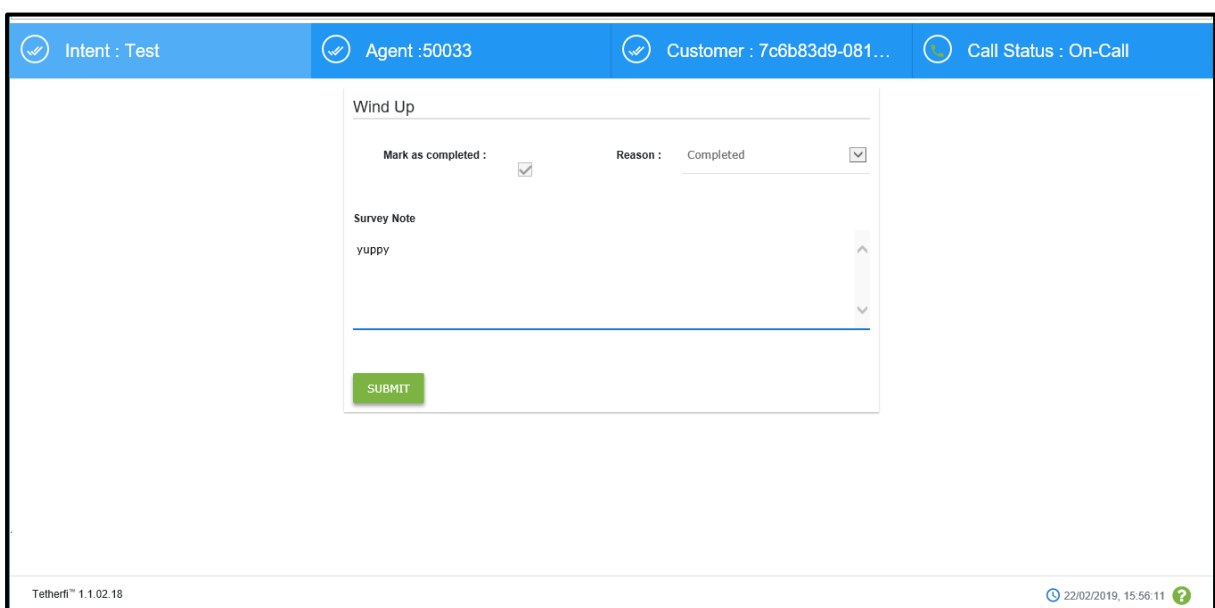7. Click on **Submit**

Figure 13.12 – Survey wind up on confirming in the wind up pop up window

Procedure of survey wind up on not confirming the wind up:

1. Operator enters the response of last question
2. **This was the last question. Do you want to wind up the survey?**

   Confirmation message with **Yes** and **No** button will be displayed.
3. When the operator chooses **No**, then the operator will be in the survey page
4. Operator can make changes to the answers by resetting the question if respondent requests for change in answer.
5. Complete the survey by answering all the questions from the resetted question and wind up the survey by confirming the wind up

Procedure of survey wind up for an incomplete survey:

1. Operator enters the response to a question
2. After certain questions are answered, respondent wants a callback as he is busy
3. Click on **End Survey** button present at the bottom right of the survey window
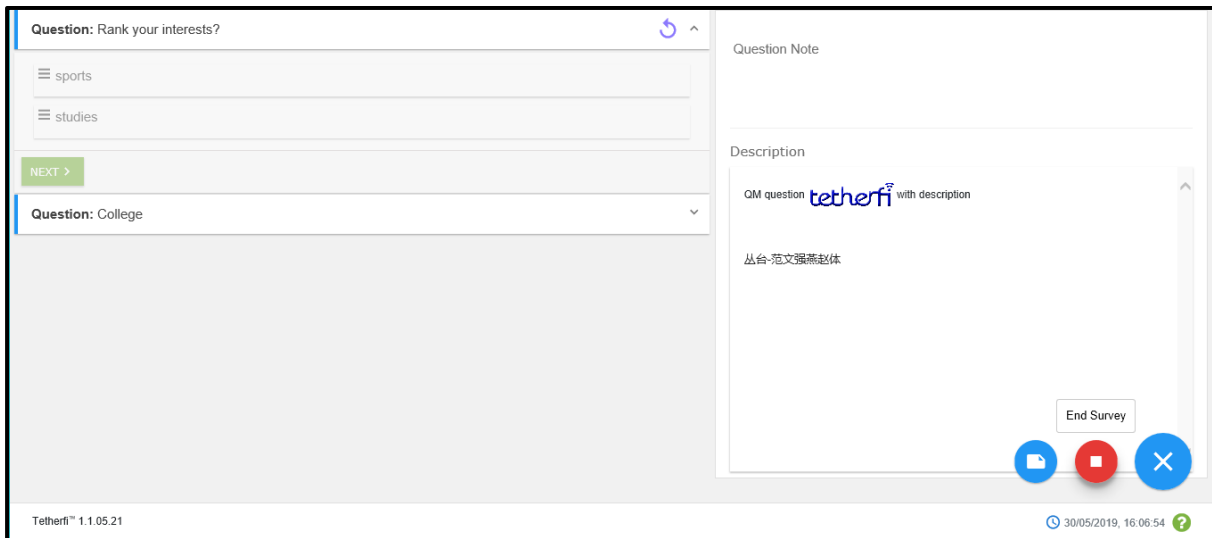
4. **This was the last question. Do you want to wind up the survey?**

   Confirmation message with **Yes** and **No** button will be displayed.
5. If Operator clicks on Yes, wind up page will be displayed.
6. **Mark as completed** will be **unchecked** and **Reason** will be reason other than Completed. It is drop down which is configurable and will have different reasons which the operator can choose.
7. Both the fields will be enabled and operator will be able to make changes
8. Operator can provide the **Survey Note** if required

9. Click on **Submit**

Operator can also close the the survey pop up window without formally winding up the survey with the procedure mentioned above. In such a case also, it will be considered as incomplete survey and survey will be resumed from where it was last stopped.

Resumption of incomplete survey

Respondent can decide to discontinue the survey and request for a callback. Operator will have to initiate a callback for the respondent on the requested date and time.

When an incomplete survey is resumed, it will start from the question where it was last stopped and all the previously answered questions will be retrieved with the already provided responses. Survey wound up process will be based on the confirmation provided by the operator which is explained earlier.

Respondent with callback initiated and survey is already completed

If a respondent for whom survey is completed but a callback is received, then a message is displayed to the operator stating that **"Survey has been completed for this customer."**

<< under construction>>

14. Offline Survey

About Offline Survey

Offline Survey is used by the agents to conduct survey when the TMAC is down for various reasons provided the hard phones are available for making calls. Each agent will get a set of survey questionnaires in excel format from supervisor/admin based on intents. Agents will fill the contact's responses to the survey questions and upload it back to TAS designer tool.

Offline Survey Conduction

Approved Questionnaires belonging to an Intent can be downloaded for offline survey. This compressed file which contains empty surveys is available in an excel template.

Generate offline templates

Procedure:

1. In the top menu bar, click on **Master** menu

In the Master menu, click on Intent.
Intent Master opens as a pop up window

2. Select the intent for the campaign survey.
3. Click on **update** button
4. Selected Intent will be present in the Intent text field on top of the questionnaire list
5. Map the questionnaires by checking the checkbox of individual questionnaires
6. Click on **Update** button next to the Intent text field

For this selected intent, click on **Download** icon present on top right of the Questionnaire list section

7. This will create an offline survey for all the questionnaires those are mapped to the given intent.
8. Zip file will be generated and downloaded to the local system
9. Supervisor will extract / share these templates to each Agent

Offline Survey template

Downloaded offline survey template will have the header and the Question&Answer section. During the survey conduction, agent has to enter the respondent details in the header section and respondent's response in the Question & Answer section.

Sample survey template is attached here for reference.

Sample Survey
Template

Agents must fill all the below mandatory fields in the header before uploading to the TAS design tool.

Field/Button	Is Required	Description
Date & Time	Yes	System generated date and time. It cannot be edited. The date when offline template was created
Intent	Yes	System Generated and cannot edit it. It should be the selected intent.
Agent ID	Yes	Agent must enter this field
Station	Yes	Agent must enter this field
Respondent Phone	Yes	Agent must enter this field
Respondent Name	Yes	Agent must enter this field
Questionnaire Name	Yes	System Generated. It cannot be edited. It should be the one of the questionnaires mapped to the intent.

Below is the format of the Question and Answer section in the survey template.

Section	Type	Questions	Selected Answer	Answer1	Custom
1/a	single				

Above columns are explained in detail below.

Column name	Description
Section	System generated. It is read only. Contains section details of the question. It should be the one provided while creating the question.
Type	System Generated. It is read only. It should be the type of question.
Questions	System Generated. It is read only. It should be the Question.

Selected Answer	Agent enters the Respondent's response in this column.
	It is a drop down for single choice question.
	For single choice answers with an option for custom answer, the single choice answers will not be available in drop down.
	Multi choice and Ranked choices have to be comma separated.
	Custom answer has to be based on the custom type.
Answer1 to n	Each Answer choice will be in separate column starting with Answer 1.
Custom	Data type for the custom answer will be displayed in this column. It should be same as that provided while designing the question.

Folder structure for uploading the Survey

TAS Designer will maintain below folder structure to create and process (read) offline surveys. Supervisor has to cleanup these directories during maintenance activities. The main folder related to the Offline Survey is Data/OfflineSurveyResult/Uploads.

Following is the snapshot:
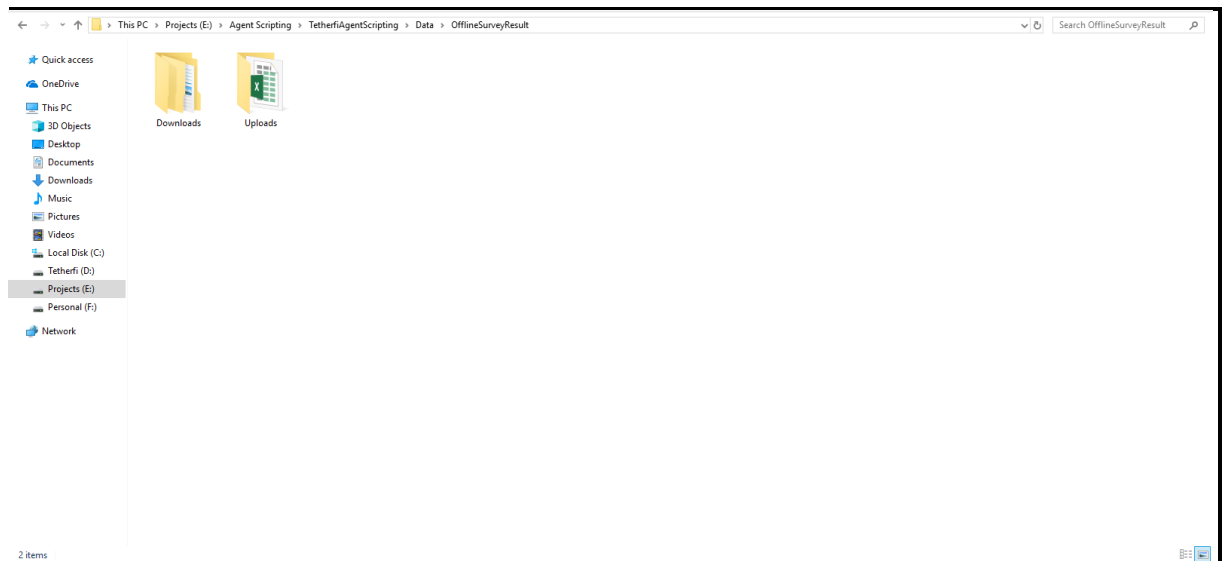
Uploading the Offline Survey

Offline surveys that are conducted has to be uploaded to the TAS application.

Offline Survey features:

1. It can be conducted only once for a respondent. If the survey is conducted for the same respondent for the same campaign again, then the earlier survey details are over written and the new survey details will be available for the respondent.

15.Response Monitor Report

About Response Monitor Report

Report will be used by the Contact Centres to know the count of answers marked for monitoring after the survey is completed. It is a daily report and data of the previous day will not be available.

Properties of Response Monitor Report

Response monitor report has 2 sections. The section on the left displays the report and section on the right displays the chart.

Properties	Description
Campaign	It is a drop down list box
	It contains the list of campaigns for which the survey was conducted.
	It will display No data found when survey is not conducted yet for the current day.
Intent	It is a drop down list box
	It contains the list of Intents for the selected campaign and for which the survey was conducted.
	It will display No data found when survey is not conducted yet for the current day.
	If the survey was conducted for 2 different intents of a campaign then both the intents will be listed in the drop down.
Questionnaire	It is a drop down list box
	It contains the list of Questionnaires for the selected Campaign's intents and for which the survey was conducted.
	It will display No data found when survey is not conducted yet for the current day.
	For the selected campaign and the intent, if the survey was conducted for multiple questionnaires and also for different versions of the questionnaire, all of them will be displayed in the drop down.
Generate Report	It is a button
	Report can be generated for only campaign selection, for campaign and intent selection and also for campaign, intent and questionnaire selection.

Note: Refresh Rate feature is provided to automatically refresh the report after certain intervals of time.

Process for creation of Response Monitor report

Response monitor reports requires questionnaire to be designed with answers that are to be monitored and then the survey has to be conducted with this questionnaire. Below are the main processes:

1. Designing the question with answers to be monitored
2. Questionnaire Approval
3. Questionnaire mapping to Intent
4. Conduction of Survey
5. Generation of report

Designing the question with answers to be monitored

In order to monitor an answer, these answers must be marked for monitoring while designing the question. Follow the steps to *Question Node and Answer Node*

Questionnaire Approval

Questionnaire with the questions having the monitor answers have to be in **Approved** status. Follow the steps provided to move the *questionnaire status from draft to approved.*

Questionnaire mapping to Intent

Questionnaire in Approved status has to be mapped to an Intent. Only when it is mapped to an intent which is same as that of the campaign, then the questionnaire is displayed during the survey. Follow the steps provided to *map the questionnaire to Intent*.

Conduction of Survey

For the contacts who have been dialed out from Tetherfi Campaign Manager application, survey will be conducted. Survey conduction will be held by the Agent using the TMAC application. Follow the steps to conduct the survey.

Generation of Response Monitor Report

Procedure**:**
In the agent scripting screen, click on **Redirect to Response Report**
Do you want to redirect to Response Report? pop up window will be displayed. Click on **Yes**.

Do you want to re-direct to Response Report ?

NO   YES

User will be redirected to a different url

1. Choose the required combination of **Campaign**, **Intent** and **Questionnaire**
2. Click on **Generate Report** button
3. Report is generated

16.Simulation

About Simulation

Questionnaire simulation is the artificial imitation of the question's travel during the survey. It will demonstrate to the designer how the questionnaire designed based on a certain branching logic be displayed to the agent.

It helps the designer in identifying the flaw in the branching logic followed while designing the questionnaire. Thus, designer can self-review the questionnaire as and when the questionnaire is being designed and also before sending it for approval to checker.

For simulating a survey, load any questionnaire and right click on any node. Simulator features are displayed as highlighted in the below screenshot.
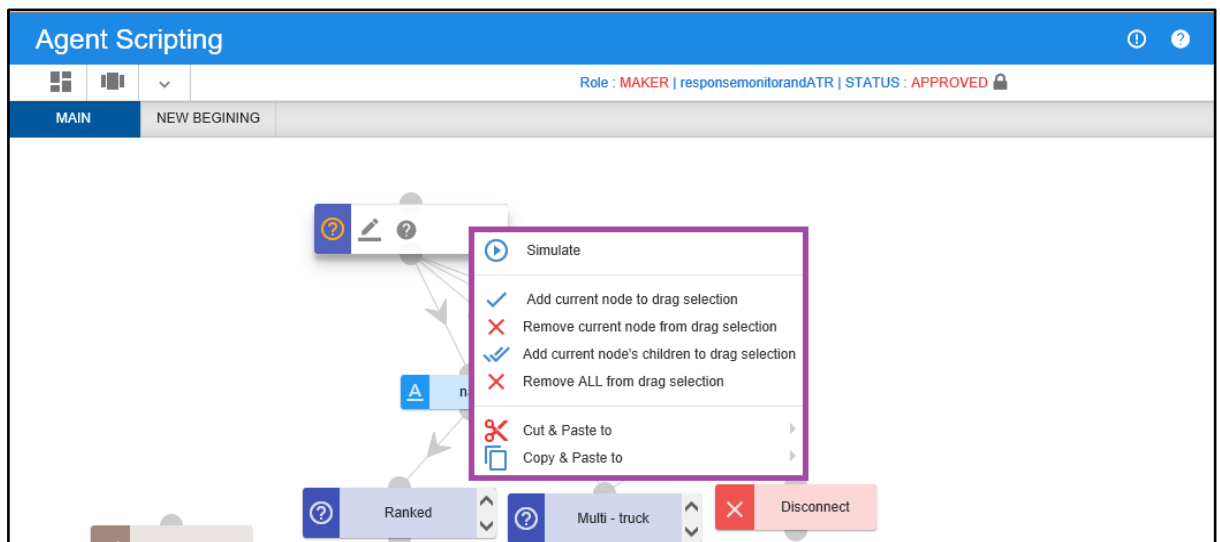

Simulation features will be explained in detail below.

Simulate:

To simulate a questionnaire, click on any of the node and right click. Click on Simulate button. Survey will be simulated from the selected node. To see the entire survey simulation, click on the main question and perform simulation.

Simulation results are displayed only when the questionnaire is saved. Otherwise the survey simulation will display only the questionnaire description and on click of continue to survey button, it will display blank survey simulation page. Otherwise it will be exact simulation of the survey.
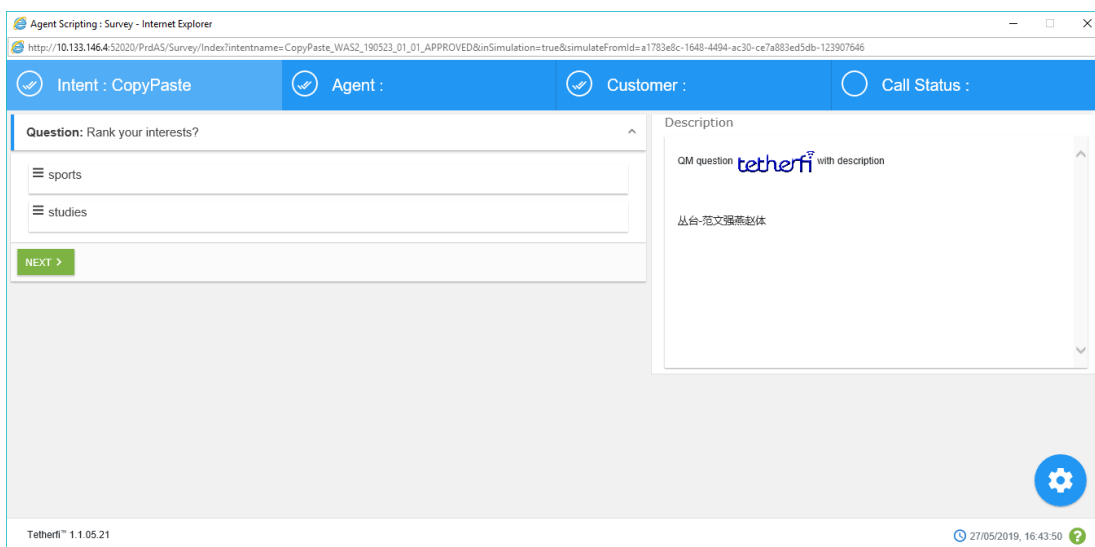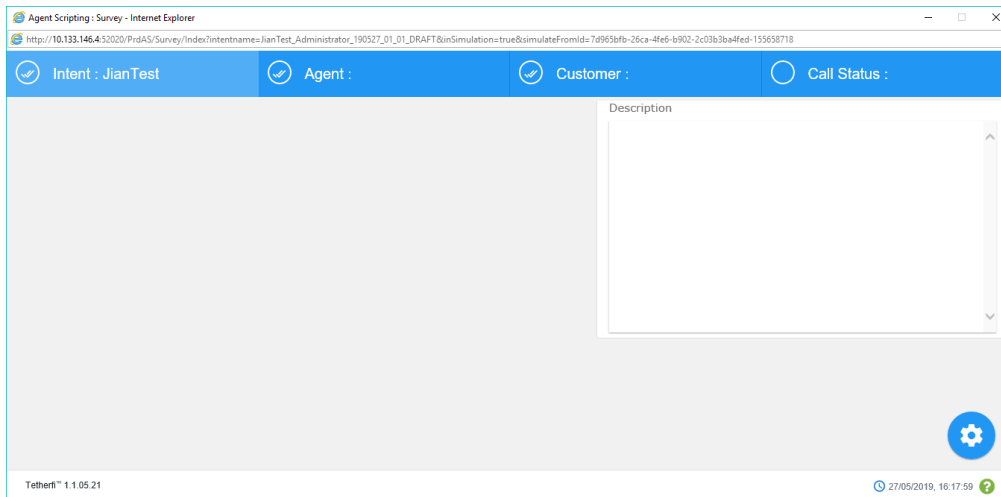
Add current node to drag selection:

This feature helps the designer in placement of the node. On selecting this feature, the selected node will be dragged whenever any of the nodes of a tab in the questionnaire gets dragged.

Remove current node to drag selection:

Node that was selected to be dragged will be removed from drag using this feature.

Add current node's children to drag selection:

Any node that has this feature selected will get dragged along with its children node.

Remove all from drag selection:

Nodes that were selected to be dragged either using the **Add current node to drag selection** or using **Add current node's children to drag selection** feature, will be removed from drag using this feature.

Cut and Paste to:

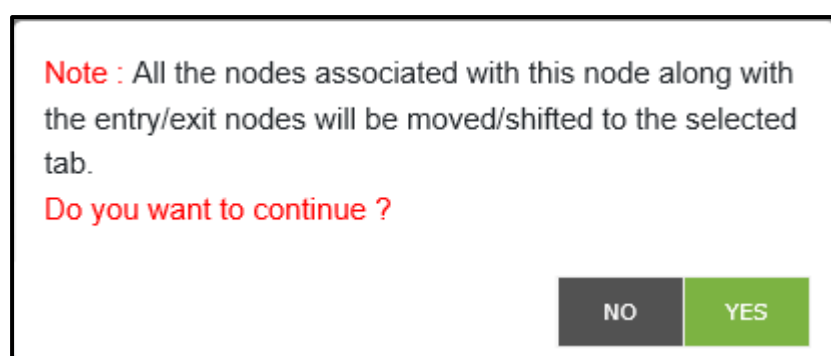This feature helps the designer to efficiently and quickly design the questionnaire.

Procedure**:**
In the agent scripting screen, select the first node of the question flow.
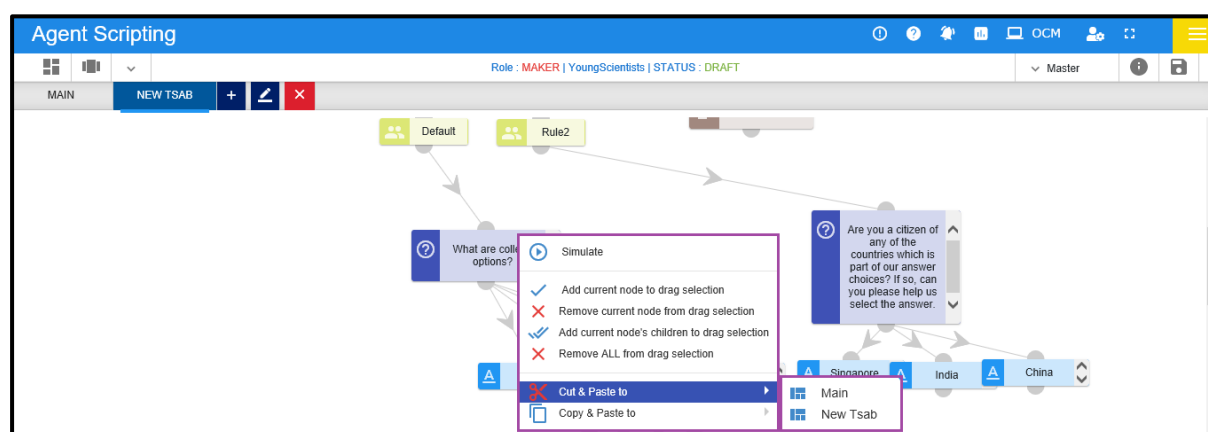Right on the selected node
Select the **Cut and Paste to** feature
Select the tab from the tab list to which the selected question flow has to be cut and pasted

Click on **Yes**
Node along with its connection will be pasted to the selected tab. Node along with its connection will not be available in the original tab.
Click on **No** will close the window and node will not be cut and pasted.

There are certain conditions to be considered while using cut and paste feature:

1. All the nodes from the selected node till the last node in the question flow will be moved to the selected tab

2. Nodes with the connection to a parent node cannot be cut and pasted to another tab till the connection with the parent node is not deleted. An error message will be displayed indicating the same.
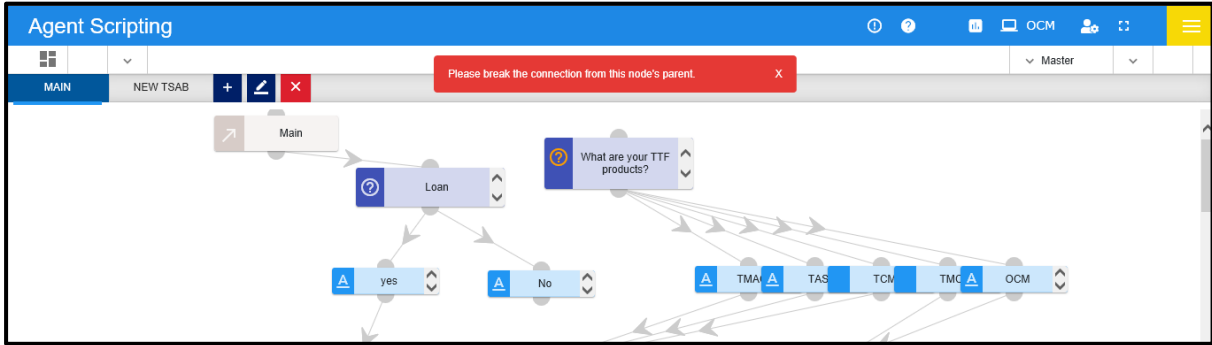
3. Nodes cannot be cut and pasted within the same tab. On selecting the cut and paste feature and selecting the same tab, an error message will be displayed.
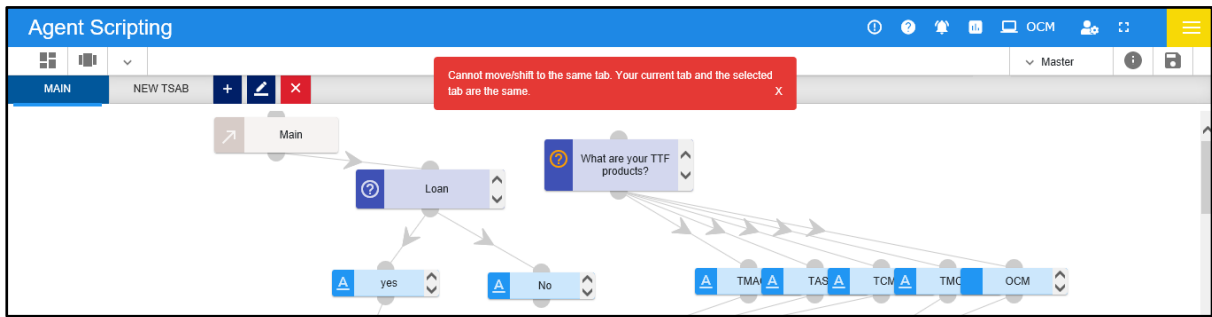
4. Cannot cut and paste conditional rule node.
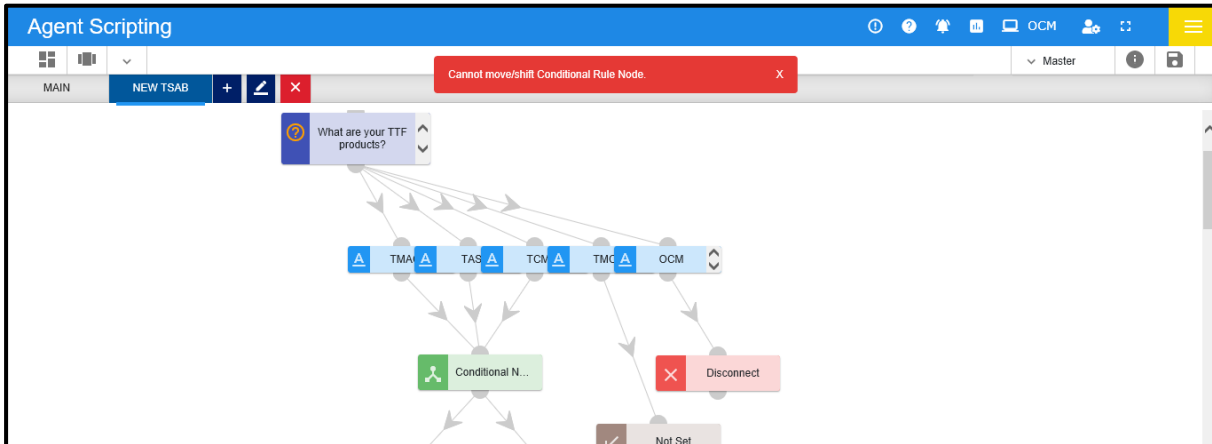
Copy and Paste to:

This feature helps the designer to efficiently and quickly design the questionnaire. Copy and Paste can be done to a selected tab with or without including node connections.
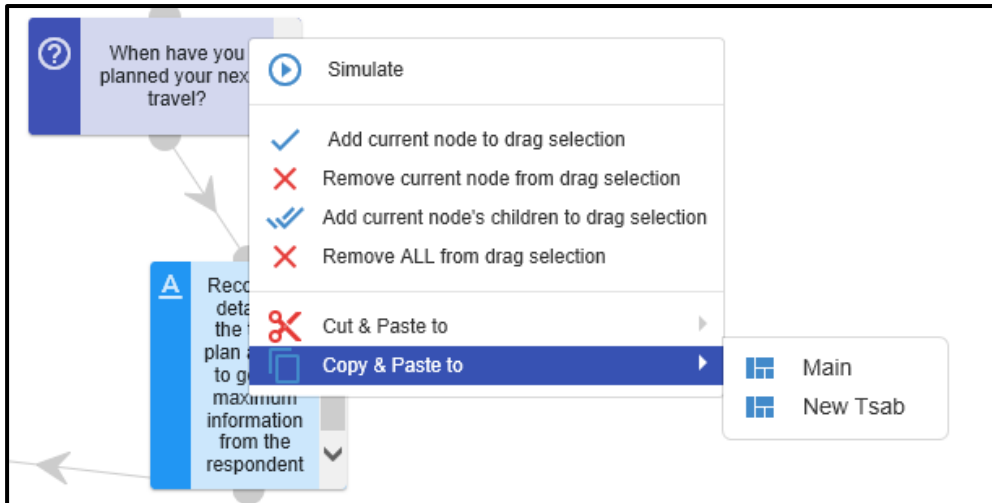
Procedure to copy and paste with node connections:

In the agent scripting screen, select the first node of the question flow.
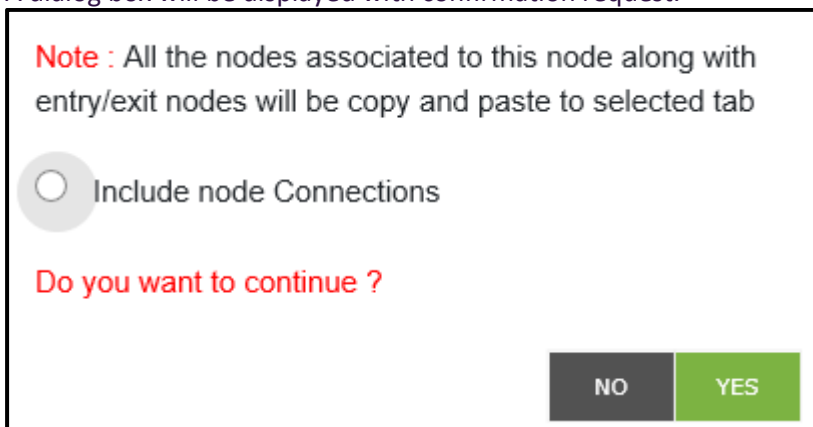
Right on the selected node

Select the **Copy and Paste to** feature

Select the tab from the tab list to which the selected question flow has to be cut and pasted

A dialog box will be displayed with confirmation request.

Click the **Include node connections** button and Click on **Yes**

Node along with its connection will be pasted to the selected tab. Node along with its connection will be available in the original tab.

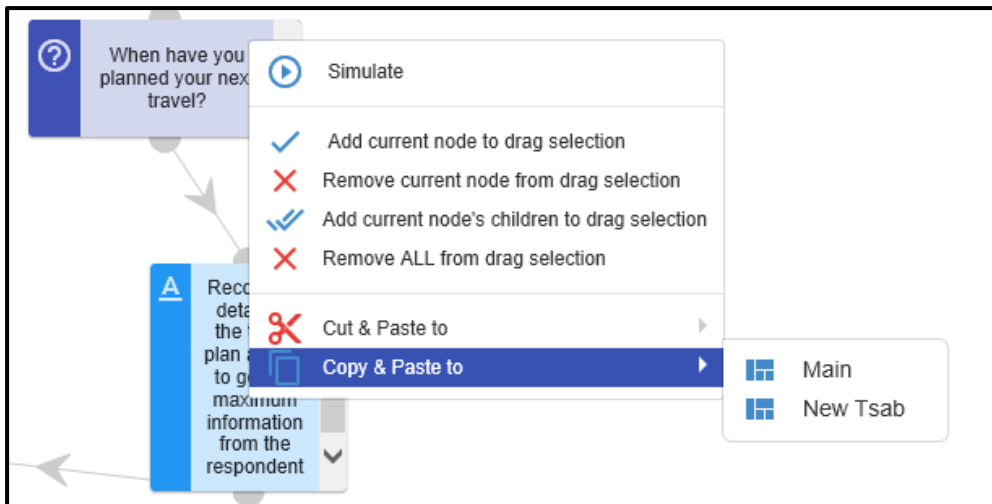Click on **No** will close the window and node will not be cut and pasted.

Procedure to copy and paste without node connections:

In the agent scripting screen, select the first node of the question flow.
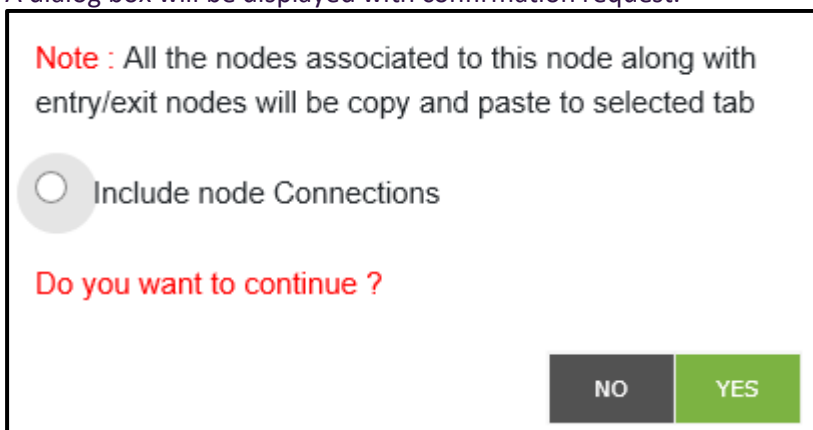
Right on the selected node

Select the **Copy and Paste to** feature

Select the tab from the tab list to which the selected question flow has to be cut and pasted

A dialog box will be displayed with confirmation request.

Do not Click the **Include node connections** button and Click on **Yes**

All the nodes from the chosen node will be copied to the selected tab except connections. Node along with its connection will also be available in the original tab.

Click on **No** will close the window and node will not be cut and pasted.

There are certain conditions to be considered while using cut and paste feature:

1. All the nodes from the selected node till the last node in the question flow will be moved to the selected tab
2. Nodes with the connection to a parent node can be copied and pasted to another tab. It will have the entire flow from the copied node.
3. Nodes can be cut and pasted within the same tab.
4. Cannot cut and paste conditional rule node.
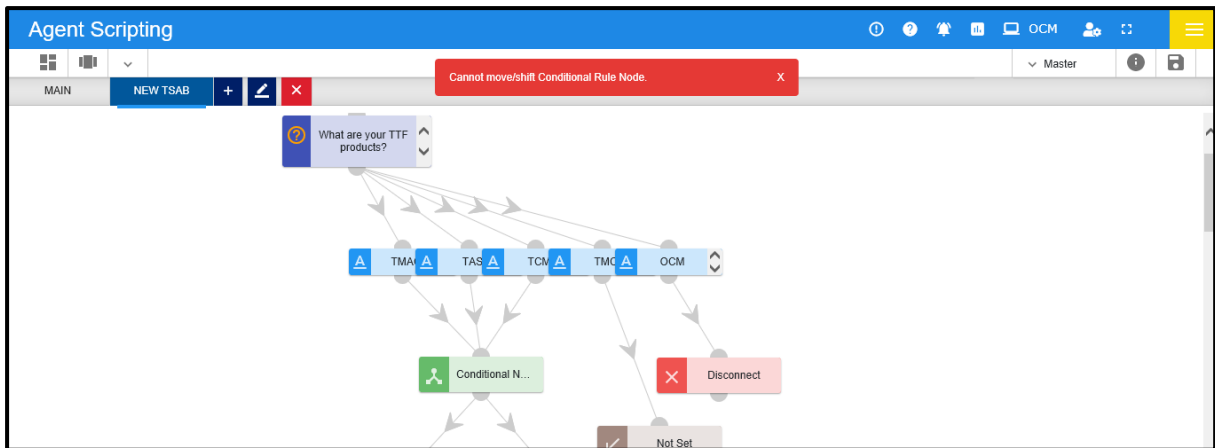
5. If an exit node connected to an entry node which is present in other tab, upon coping the exit node, entry node will not be copied.