**User Opens Survey**

**Actor:** Participant

**Goals:** To access the survey and be able to view the questions.

**Preconditions:** Survey designer has made the survey and has sent the survey link to the participant.

**Summary:** The survey designer will send the participant a link to access a survey. Once the participant clicks the link, they will be directed to a survey where they are able to view the first question.

**Related Use Cases:** User takes survey, User completes survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. The user clicks on the link provided to them in an email. | 1. The survey loads in the user’s web browser, and the first question is displayed on the screen. |

**Postconditions:** The first survey question is displayed on the screen for the participant to see.

**User Takes Survey**

**Actor:** Participant

**Goals:** Complete all questions in survey.

**Preconditions:** Participant has opened the survey.

**Summary:** The participant will answer a series of questions of varying question types. Depending on the question, the user will have to complete all parts before they can advance to the next question. The user also has the option to review previous questions if they are in the same section as their current question.

**Related Use Cases:** User opens survey, User completes survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User reads the displayed question and identifies the question type as multiple choice (radio button), conjoint trade-off, free response, dropdown, ranking, rating, or constant sum. 2. User answers all the questions on the page. 3. User has the option to proceed to next question or go back to previous    1. User answers the questions on the page and presses "Next".    2. User can press "Back" button to go back to the last question unless the user has passed the checkpoint. | 1. *None.* 2. System updates webpage with user's answers and displays "Next" button.     1. The system responds with the next set of questions.    2. The system shows the previous question. |

**Postconditions:** The user has completed all the questions on the page and has clicked the next answers button.

**User Completes Survey**

**Actor:** Participant

**Goals:** Submit the completed survey to the database and thank the participant for taking the survey.

**Preconditions:** The user has answered all questions and is ready to submit their answers.

**Summary:** The user will click “Submit” when they are on the last question. A confirmation dialog box will open so the user can confirm that they are ready to submit. When they submit their answers, a thank you page appears.

**Related Use Cases:** User takes the survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks "Submit" at the end of the survey 2. The user clicks yes or no. 3. The user has completed the survey. | 1. A dialog box opens asking the user if they are ready to submit their answers. 2. If the user clicks yes, the answers are submitted to the completed survey data base. If the user clicks no, they are taken back to the last question. 3. A thank you message appears to the user. |

**Postconditions:** A thank you page is loaded and displayed on the screen.

**A User Logs In**

**Actor:** Designer, Analyst, Executive, Administrator

**Goals:** Authenticate user login and prevent unauthorized access

**Preconditions:** User has a username and password

**Summary:** When the user visits the survey website, they will be prompted for a username and password. Each user is given a username and password from the administrator of the system. The system needs to check whether the username and password match; if so, the user will be directed to their corresponding environment.

**Related Use Cases:** None

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User opens the survey webpage. 2. User enters username. 3. User enters password. 4. User clicks “Login.”    1. User enters incorrect password.    2. User enters correct password. | 1. Displays login page. 2. Page reflects what user typed. 3. Page reflects what user typed. 4. System authenticates user login.    1. Displays error message saying "Incorrect username or password."    2. System directs user to their corresponding environment. |

**Postconditions:** User will be logged in, viewing their environment.

**A User Changes Their Password**

**Actor:** Designer, Analyst, Executive, Administrator

**Goals:** User sets their password.

**Preconditions:** Administrator has already set up their account.

**Summary:** A user can change their password. The first time the user logs in they will be prompted to reset their password from the generated one.

**Related Use Cases:** Create Account, A User Logs In

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User enters new password. 2. User enters confirms password. 3. User clicks “Register.” | 1. Page reflects what user typed. 2. System checks passwords are the same. 3. System authenticates user login, sets the password and directs them to their corresponding environment. |

**Postconditions:** User will be logged in, viewing their environment. Their new password is now set.

**Make New Survey**

**Actor:** Survey Designer, Executive

**Goals:** To make a new blank survey that is ready for editing by the survey designer.

**Preconditions:** The survey designer is logged in to his profile.

**Summary:** The survey designer will be logged into his profile. On their homepage, they will be able to click a button to create a new survey. Once the designer selects the settings they want, they will click “Create” and a blank survey will open, ready to be edited.

**Related Use Cases:** Open Existing Survey, Save Survey, Publish Survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. The designer clicks the “Create new survey” button. 2. The designer can modify these settings for the survey. Some of the settings include but are not limited name of the survey, participant response quotas, and number of questions in the survey. 3. The designer clicks the create button. | 1. A page of settings opens. 2. *None*. 3. The settings page closes, and a blank survey page opens. |

**Postconditions:** A blank survey will be open and ready for editing.

**Open Existing Survey**

**Actor:** Survey Designer, Executive

**Goals:** Designer opens a survey that they already started or finished.

**Preconditions:** The survey has been started. The user is logged in.

**Summary:** The user will open a search menu, which will list all saved surveys. This list can be sorted by name, category, survey status, or recently modified. There will also be a search bar, which can refine the surveys displayed in this menu. Upon selecting a survey, the user will then be presented a few options: "Edit", "Duplicate", "Delete", and "Go Back". If "Edit" is selected, it opens the survey design tools and allows the user to pick up where they left off on the design. If "Duplicate" is selected, they are prompted to rename the duplicate survey. If "Delete" is selected, the user is prompted to confirm or deny the selection. "Go Back" returns to the survey selection menu.

**Related Use Cases:** Make New Survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks on “Open Existing Survey” tab. 2. User can change the order of the list of surveys. 3. User can search for a survey by name. 4. User selects survey. 5. User selects "Edit". 6. User selects "Duplicate". 7. User selects "Delete". 8. User selects "Go Back". 9. Repeat from step 2 as necessary. | 1. System fetches a list of all saved surveys. 2. System re-orders list according to order selection. 3. System searches for similarly named surveys, and presents only those. 4. System opens menu with four options: Edit, Duplicate, Delete, Go Back. 5. System opens survey editing tool. 6. System prompts user to rename duplicate survey. 7. System prompts for confirmation. 8. List of all surveys is fetched again. 9. *None.* |

**Postconditions:** An already existing survey has either been updated, duplicated, deleted, or left alone.

**Add Question/Checkpoint to Survey**

**Actor:** Survey Designer, Executive

**Goals:** To create a new question or checkpoint that will be added to the survey.

**Preconditions:** Designer has created a new survey and has it open.

**Summary:** The survey designer will add a new question or checkpoint to the survey. When adding a question, they will specify the question type, possible answers, and question flow logic. They will be able to add as many new questions to a survey as they wish, but must add them one at a time.

**Related Use Cases:** Edit existing question, Remove question from survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks “Add New Question” button. 2. User types in the question. 3. User specifies the question type from a drop-down menu option.    1. Multiple Choice    2. Multiple Answer    3. Conjoint Trade-Off    4. Free Response    5. Drop-Down    6. Ranking    7. Rating    8. Constant Sum 4. User specifies any necessary question type parameters.    1. User specifies number of answer options to display.    2. User types the answer possibilities. 5. User specifies question flow logic and indicates whether there is a checkpoint or not. 6. User exits “new question” template.     1. User clicks “Done.”    2. User clicks “Cancel.” | 1. System displays “new question” template to screen. 2. System displays question on screen. 3. System displays a template for the user-specified question type.      1. System displays user inputs on screen.      1. System displays user inputs on screen. 2. System closes template and displays survey.    1. System saves question and/or checkpoint.    2. System discards question and/or checkpoint. |

**Postconditions:** The new question or checkpoint can be seen in the survey and the user is able to view the new question or checkpoint on the screen.

**Edit Existing Survey Question**

**Actor:** Survey Designer, Executive

**Goals:** To change a question, question type, answer option, number of answer options, or the question flow logic of an existing question in the survey.

**Preconditions:** Survey designer must have an existing survey already open, with at least one question already created that they wish to change. Designer is logged in.

**Summary:** The survey designer may change a question, question type, answer option, number of answer options, or the question flow logic of an existing question in the survey. They will be able to edit a question as many times as they wish before distributing the survey.

**Related Use Cases:** Add new question to survey, Remove question from survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User finds the question they wish to change. 2. User clicks the “Edit” button on the question. 3. User changes one or more of the parameters displayed on the screen.    1. Types a new question.    2. Changes the question type.    3. Adds/Removes an answer option.    4. Changes the question flow logic. 4. User exits the “Edit Question” screen.     1. User clicks “Done.”    2. User clicks “Cancel.” | 1. *None.* 2. System displays an “Edit New Question” template containing the existing question specifications. 3. System displays the corresponding changed info. 4. System closes the “edit new question” template and the survey is displayed on screen.    1. System saves question changes.    2. System discards question changes. |

**Postconditions:** The changes to the edited question are reflected in the survey, and the user can view them on the screen.

**Remove Question from Survey**

**Actor:** Survey Designer, Executive

**Goals:** To delete a question from the survey.

**Preconditions:** Survey designer must have a survey open that contains a question that they wish to remove from the survey.

**Summary:** Survey designer is able to remove a question from the survey if they no longer wish to include it. The user is able to remove questions from the survey only until it is distributed to the participants.

**Related Use Cases:** Add new question to survey, Edit existing question in survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User finds the question they wish to delete. 2. User clicks “Delete.” 3. User verifies deletion.     1. User clicks “Confirm.”    2. User clicks “Cancel.” | 1. *None*. 2. System displays a pop-up window asking the user if they are sure they want to delete the question. 3. System closes pop-up window and displays survey on screen.    1. System deletes question.    2. System does not delete question. |

**Postconditions:** The deleted question is no longer present in the survey and cannot be seen by the user.

**Save Changes to Survey**

**Actor:** Survey Designer, Executive

**Goals:** To be able to save an existing survey so that it can be viewed, edited, or published at another time.

**Preconditions:** Designer is logged in. Survey designer has created a survey.

**Summary:** The survey designer will be able to save a survey so that it can be viewed, edited, marked as “Ready for Review,” or published at another time. The survey designer can save a survey as many times as they wish until the survey has been published and distributed to participants.

**Related Use Cases:** Mark survey as ready for review, Publish survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks “Submit Changes.” | 1. Current state of survey saved to database. Save window pops up saying "Survey Saved." |

**Postconditions:** User is returned to survey in current state. System has stored copy on server.

**Mark Survey Ready for Review**

**Actor:** Survey Designer, Executive

**Goals:** Ask for feedback on a survey from executive(s) before publishing.

**Preconditions:** At least one survey design in progress. User is logged in. User is viewing the survey they wish to have reviewed.

**Summary:** A survey, whose design is in progress, has been selected, so it can be put up for review by the executive.

**Related Use Cases:** Save Survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks “Ready for Review.” | 1. Current state of the survey is saved and the system marks the survey as ready for review. |

**Postconditions:** User can see the survey is marked ready for review.

**Select Survey to View Statistics**

**Actor:** Survey Analyst, Executive

**Goals:** Locate a survey to view response statistics for.

**Preconditions:** Survey has been published. Survey has at least one completed survey response. User is logged in.

**Summary:** When the analyst decides to view statistics on survey responses, they will open up a menu which lists out surveys. This list can be sorted in various ways: alphabetically, by number of responses, by date deployed, etc. There will also be an option to search for a specific survey through use of keywords in the title or description, so that the list only displays matches to the search. The analyst will then click on the survey of their choosing.

**Related Use Cases:** Open survey, Select questions to view statistics for, Select statistics to view

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks “Analyze A Survey.” 2. User navigates to survey. 3. User searches for survey. 4. User picks survey to view stats for. | 1. System opens survey search menu. 2. *None.* 3. System refines displayed options. 4. System fetches survey. |

**Postconditions:** A new page is opened, show various response details about this survey, as well as statistical refinement options.

**Select Question to View Statistics**

**Actor:** Survey Analyst, Executive

**Goals:** View the question and analysis of the responses to the question.

**Preconditions:** The user has selected a survey to view statistics for.

**Summary:** The user views the list of questions and selects the one that they wish to view. The user then presses a button to show all the data for that question. It has basic analysis at the top and all of the responses below. There are also other features that the user can use, such as analyzing the data with another tool.

**Related Use Cases:** Select Survey to View Statistics, Select Statistics to View

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User views the list of questions and selects the one that he/she wishes to view. 2. User presses "View Statistics." | 1. System shows that the question is selected. 2. System opens the question and shows some statistics and all of the answers for the question. |

**Postconditions:** A new page is opened where the user is viewing a question and all of its responses, where the user can then analyze the data further using tools.

**Select Statistics to View**

**Actor:** Survey Analyst, Executive

**Goals:** Specify exactly what types of statistics to view, and how they should be represented.

**Preconditions:** A survey with responses has been opened by an analyst account, and questions have been selected to view statistics on. User is logged in.

**Summary:** The analyst will see two successive menus. The first menu will list all demographics present in the surveys responses, grouped by category (age, sex, race, etc). Next to each option will show the total number of responses which checked off that demographic. Any number or combination may be selected on demographics. The analyst then hits “Next” and is moved to the second menu, which lists different available statistics. In a similar fashion, they select any number or combination of statistics to view then click “View Statistics” to confirm their choices.

**Related Use Cases:** Select Questions To View Statistics For, Select Survey to View Statistics

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User confirms question(s) to view stats for. 2. User identifies a subset of participants on which to view statistics, and hits “Next.” 3. User identifies the statistical information to view for the specific set of questions, and hits “View Statistics.”    1. If user chooses "**regression analysis"**, the user selects the independent and dependent variables.    2. If the user chooses "**cross-tabs"**, the user specifies the variables to place in the rows and columns. | 1. System opens the “Select Statistics to View” menu. 2. Menu advances to the second page, with statistical options. 3. System displays the selected statistics for the groups specified. |

**Postconditions:** Statistical summary page is displayed.

**Export Survey Results**

**Actor:** Survey Analyst, Executive

**Goals:** Export the survey to another format.

**Preconditions:** The survey has been published, the survey has at least one complete response, and the user has selected a survey.

**Summary:** The information from the survey needs to be exported to CSV and/or Excel format so that the analyst can perform various actions on the data. The analyst can either export all of the data from the survey or a subset of that data based on what they choose.

**Related Use Cases:** Open survey, Select Survey to view statistics, Select statistics to view

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User selects set of responses he/she wishes to export. 2. User presses "Export." 3. User chooses the format and presses "Export." | 1. System shows output in a spreadsheet format in the app. 2. Window pops up where the user can choose which format. 3. File is exported to the user's downloads. |

**Postconditions:** The system goes back to showing the output in a spreadsheet format in the application.

**Create Account**

**Actor:** Administrator

**Goals:** Create a new username, password, and specify any other info pertaining to the new account.

**Preconditions:** New username and role have been provided to the Administrator. Administrator is logged in.

**Summary:** A new user is to be added to the system. The Administrator creates a new account with the given username, and a random password is generated. The type of account is specified by the Administrator.

**Related Use Cases:** Edit Account, Remove Account

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User presses “Create New Account.” 2. User enters new account information. 3. User clicks “Generate Password.” 4. User clicks “Submit.” | 1. System displays entry fields. 2. *None*. 3. System generates random string as temporary password for the account which is displayed in the administrator panel. 4. Account is added to database. |

**Postconditions:** User is taken back to main administrator menu. New account has been added to database.

**Edit Account**

**Actor:** Administrator

**Goals:** Change information of a previously made account.

**Preconditions:** User account exists. User is logged in.

**Summary:** An existing user needs to have their info changed. The administrator can edit their username and role field, as well as generating a new temporary password.

**Related Use Cases:** Create Account, Remove Account

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks “Edit Account.” 2. (opt) User changes username or role. 3. (opt) User clicks “Generate Password.” 4. User clicks “Update Info.” | 1. System displays entry fields filled in with previous data. 2. *None.* 3. System generates random string as temporary password for the account which is displayed in the administrator panel. 4. New account info is stored into database. Old password is overwritten. |

**Postconditions:** User is taken back to main administrator menu. Existing user account has changed data stored in the database.

**Remove Account**

**Actor:** Administrator

**Goals:** Delete pre-existing account.

**Preconditions:** Account exists. User is logged in.

**Summary:** An existing user no longer needs their account. The administrator removes it.

**Related Use Cases:** Edit Account, Create Account

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks “Delete Account.” 2. User enters username and clicks “Search.” 3. User clicks “Delete Account.” | 1. System displays search field. 2. System displays corresponding user account. 3. Account is deleted from the system. |

**Postconditions:** User is taken back to the main administrator menu. Existing user account is no longer stored in the database.

**Mark Survey Reviewed**

**Actor:** Executive

**Goals:** Provide feedback on a survey created by designers but not yet published.

**Preconditions:** At least one survey design in progress has been selected to review or marked as ready for review. User is logged in.

**Summary:** A survey, whose design is in progress, has been selected by the executive, so they can review it.

**Related Use Cases:** Open Existing Survey

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks “Passed Review.” 2. User clicks “Failed Review.”    1. User writes comment.    2. User makes edit. | 1. System marks the survey as ready for publishing.    1. User is given option to publish. 2. System marks the survey in progress.    1. Comment is sent to survey designer.    2. Survey is updated to reflect change. |

**Postconditions:** User has made a determination of the state of a survey. User can either select to publish the survey, or make an edit and/or leave a comment depending on the state.

**Publish Survey**

**Actor:** Survey Designer, Executive

**Goals:** Publish a survey so participants can respond.

**Preconditions:** At least one survey has been completed and passed review. User is logged in.

**Summary:** A selected survey that has passed review can be published and sent to participants to gather responses.

**Related Use Cases:** Mark survey reviewed

**Steps**

|  |  |
| --- | --- |
| **User Action** | **System Response** |
| 1. User clicks “Publish Survey.” | 1. System generates unique links which can be distributed to survey participants. System waits for responses. |

**Postconditions:** User can view the contents of the selected survey. User can view data and responses if a survey has at least one response.