

## Edit Mode

- Text editor
  - Includes a format bar, for bolding, italicizing, underlining, etc. Current format does not have this, so markdown is required. Markdown code is time consuming, and oftentimes account managers don't remember.
- Add question
  - Being able to hover anywhere to add question makes this process really simple, avoids having to move questions/headers after adding them because you can put them in the right place.
- Add follow up question
  - Being able to add a follow up question wherever there is a question by hovering helps account managers visualize where the follow up question will be and simplifies the process.
  - Currently, follow up question format is indented and gets confusing in that way. We will change it to a visual linking design without indentations so that users know exactly which questions are grouped together.
- Add step
  - Adding a step is done by hovering anywhere. This eliminates the need to move the step after adding it.
- Star
  - Starring questions helps account managers save questions, headers, or subheaders for later. Often times, account managers want to easily go back to something they were working on without having to recall what it was.
- Question type change
  - Can always change question type because sometimes account managers select the wrong question type, or need one that is similar but ultimately has different options.

## Dashboard

- No hover mode
  - Our research shows that hover mode isn't needed because there's often no good way to summarize a step, as there are sometimes no headers and other times there are just too many..
- Info
  - Name of step
  - Date of Expiration
    - Helps account managers understand if anything needs to be changed.
  - No permission groups
    - Might be redundant, too many groups listed could cause info overload
    - Editing permissions won't be done on dashboard, because editor is only one click away.
- Load Template
  - Import from an external source or use a saved template

- Can import templates from sources like excel, csv and JSON files.
- These templates automatically are parsed by the system and uploaded as separate steps.
- Saved templates are for repetitive templates- often times, account managers want to reuse questions from a previous form.
- Default description for the form
  - All forms have a default description, and can be changed depending on the organization.
- Add step button
  - Adding steps leads you to the editor, adding a step from dashboard automatically adds it to the end (less confusing).
- Last modified and starred panel
  - Last modified panel will be utilized so that account managers remember what they were last working on, so they can go back and finish it.
  - Starred panel is for important questions, headers, and subheaders that need to be revisited at some point.
- Dragging steps
  - Drag and drop simplifies the process that is currently pressing arrows until your object is where you want it to be. This is tedious for really long forms.

## Deactivate Questions

- Delete or Activate
  - When deactivating a question, you have a deactivated question folder where they are stored until you permanently delete them. This solves the problem of accidentally deleting something.
  - Activating a question from deactivation places your question back into the editor, at which point you can decide if you want the question where you left it or in a new step. This makes it easy control the location of a reactivated question, as before it just went back to where it was before you deactivate it- and you might not remember where that was.

## Navigation

- Collapsing
  - Solves information overload, a problem with longer forms. Most current forms are cumbersome to navigate through because of no collapse option. Now, account managers can focus only on what they are editing.
- Filtering
  - Criteria
    - Starred
    - Permission Group
    - Expiration Date
    - Question Types

- Last Modified Dates
  - Filtering by certain criteria is important when wanting to perform mass actions. Sometimes, account managers want to mass expire questions that are restricted to certain groups, or delete a chunk of questions that are expiring soon. Currently, this has to be done one by one.
  - Hiding
    - Hide what doesn't match your criteria, so you can filter out what you don't need.
- Buttons
  - Deactivated Questions
    - Brings you to a new folder, where you can delete or reactive questions.
  - Quick actions
    - "Mass action" tools, but also lets you perform actions for just one question. Required for completing multiple tasks at once.
  - Home
    - The homepage is the dashboard, which helps give a clear overview of the form and provides shortcuts to last modified and starred questions.
- Question type icons
  - Icons regarding question type were recycled from the old design so that account managers do not bear a learning curve in understanding new icons.

## Quick Actions

- Select all
  - Allows you to select every question without having to individually select them- a tedious task.
- Bottom buttons
  - Decative, expire, export, duplicate, restrict
    - From our research, we found that these tasks would be convenient if able to perform to many questions at one time.
- Top buttons
  - Undo, redo, exit
    - Sometimes account managers make mistakes. They want to be able to easily go back and fix that.
- Duplicate
  - Duplicate groups questions together, and they will go to the bottom of the form
    - This is the format that makes the most sense, as often times questions selected for mass actions or duplication are not in order. What would happen then? The grouping together solves this confusion, and questions can still be reordered.
- Restrict
  - Group, age and sex
    - Currently, restricting questions by age and sex is separate from restricting by group. Grouping these all together will clear up confusion.

- Dragging
  - Modify Structure
  - Make it a follow up
    - Using drag and drop to create follow up questions makes it easy to switch a question to a follow up question.
- Save reorder
  - Reordering questions in the quick actions tool makes it easy to quickly drag and drop.
- Question Details
  - Permission, Sex & Age Restrictions
    - Based on research, these are the only factors that are important when determining if a mass action should be used.