

Questionnaire Design Tips

Thank you for your interest in Security Assessment Questionnaire. This document gives you design tips for creating your templates with the risk and compliance questions you want to get answers for – it's quick, easy and fast!



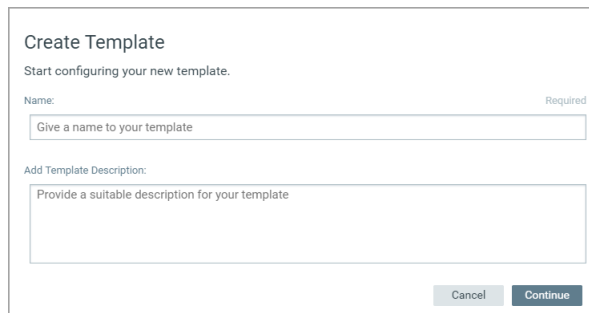
Ask questions in a wide variety of formats – these are already configured and are ready to use!



Get responses in any type of format you want – just drag, drop and you are all set to go!

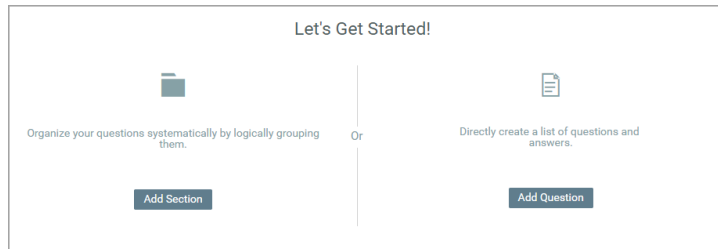
Let's get you started...

Give a title and add description about the template you want to create.



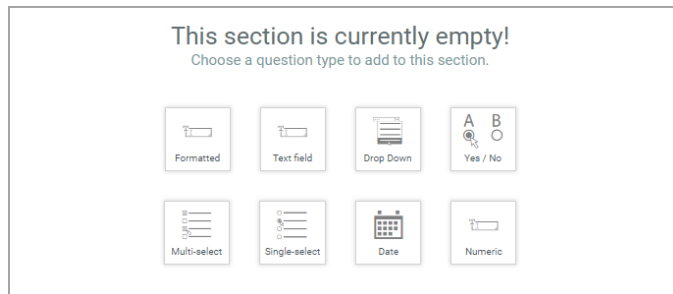
The screenshot shows a 'Create Template' form. It has a title 'Create Template' and a subtitle 'Start configuring your new template.' Below this is a 'Name:' field with a 'Required' label and a placeholder 'Give a name to your template'. Underneath is an 'Add Template Description:' field with a placeholder 'Provide a suitable description for your template'. At the bottom right are 'Cancel' and 'Continue' buttons.

It's easy to divide a complex template into sections and subsections. Just click Add Section or Add Question and start designing your template.



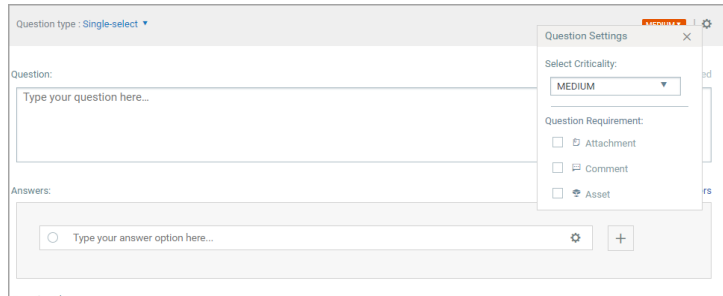
The screenshot shows a 'Let's Get Started!' screen. It has two options: 'Organize your questions systematically by logically grouping them.' with an 'Add Section' button, and 'Directly create a list of questions and answers.' with an 'Add Question' button. The word 'Or' is placed between the two options.

Pick the format of answers you want from the user for your questions.



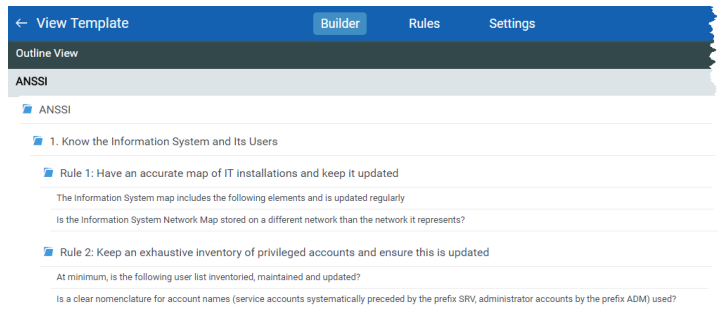
The screenshot shows a 'This section is currently empty!' screen. It has a subtitle 'Choose a question type to add to this section.' Below this are eight question type icons: 'Formatted', 'Text field', 'Drop Down', 'Yes / No', 'Multi-select', 'Single-select', 'Date', and 'Numeric'.

Customize the question properties from the Question Settings. You can set criticality of the question, choose if you need an attachment, comment, assets etc from the user, etc. Use Answer Settings to Set scores for your answers, add description etc.



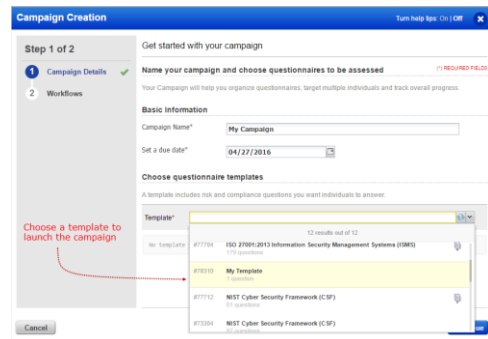
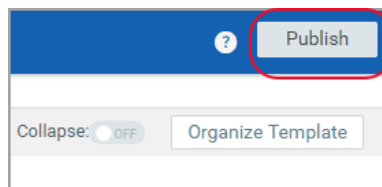
Create rules while configuring the template, to dynamically show or hide questions from the Rules tab.

Similarly, add all sub sections and questions you want to the template.



Would you like to restructure or review the template in tree view? Simply select Organize Template and continue to drag and drop sections and questions in the template.

After you are done designing your template click Publish. Your template is in the draft state till you publish it.



That's it! You are now ready to launch Campaigns using this template.

Want to use templates from our library?

Simply add it from library to your templates list and keep it as is or edit it as per your liking. Then publish it and you are ready to use the template to launch campaigns.

Want to edit the template outside the product?

Surely, just export, edit, and import a template in XML format. Simply publish it once imported and it is ready for use.