



# Merge Data 2.0

FRD Document

# Outline

Let's talk about...



Problem statement



User story



Solution description



Wireframes



# Problem statement

QuestionPro does not have an option to easily merge the responses from multiple surveys with similar question(s) and export the merged data in the excel format.

# Use story

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Research Edition Customer

**As a Research Analyst**, I have to provide accurate analysis of the survey results to the stakeholders. Sometimes, **I need** to combine the data from multiple surveys and analyze it **so that** we can get overall ratings/sentiments from all the surveys. Also, if required export the merged data without impacting the survey.

Example - If I am running a research for a particular product in 5 markets, each market would have a unique survey, but in the end, I need to combine them for aggregated results.

# Solution

QuestionPro will provide an option to select the surveys to merge the responses based on the question mapping configured by the user. The user can either merge the data into the current survey or export the merged data in an excel file.

# | Wireframes

# Select Surveys

The screenshot displays a web application interface for managing surveys. At the top, a dark navigation bar contains the 'Surveys' logo, a breadcrumb trail 'My Surveys > Product Satisfaction', a search icon, an 'Upgrade Now' button, and icons for help, notifications, and a user profile. Below this is a secondary navigation bar with tabs for 'Edit', 'Distribute', 'Analytics', and 'Integration'. The 'Integration' tab is active, and a 'Merge' icon is selected. The main content area is titled 'Merge Data' and features a 'Survey' section with a dropdown menu. The dropdown is open, showing a list of surveys with checkboxes: 'Service Satisfaction' and 'Sales Satisfaction' are checked, while 'Study-1', 'Study-2', 'Study-3', 'Blockchain Market Research Survey', 'Customer Support Feedback', and 'Sales Rep Feedback' are unchecked. A 'Save Changes' button is located at the bottom right of the dropdown menu.

Surveys My Surveys > Product Satisfaction

Upgrade Now

Edit Distribute Analytics Integration Responses 4

Reports Analysis Text Analysis Choice Modelling Merge

Merge Data ?

Survey

Service Satisfaction, Customer Satisfaction

- Service Satisfaction
- Sales Satisfaction
- Study- 1
- Study- 2
- Study- 3
- Blockchain Market Research Survey
- Customer Support Feedback
- Sales Rep Feedback

Save Changes

# Configure the Merge

The screenshot shows the 'Merge Data' configuration screen in a survey tool. The interface includes a top navigation bar with 'Surveys', 'My Surveys', and 'Product Satisfaction'. Below this is a secondary navigation bar with 'Edit', 'Distribute', 'Analytics', and 'Integration'. The 'Integration' section is active, showing options for 'Reports', 'Analysis', 'Text Analysis', 'Choice Modelling', and 'Merge'. The 'Merge Data' section is titled 'Merge Data' and features a 'Survey' dropdown set to 'Service Satisfaction, Customer Satisfaction'. Under 'Map Questions', there are three columns: 'Product Satisfaction' (4 completes), 'Service Satisfaction' (3 completes), and 'Customer Satisfaction' (3 completes). Each column has a list of questions with dropdown arrows and a left-pointing arrow. The first row shows 'Q1' in all three columns, with a plus sign between the first and second columns. The second row shows 'Q2' in all three columns, with plus and minus signs between the second and third columns. The third row shows 'Custom1' in the first column, 'Survey Name' in the second, and 'Survey Name' in the third, with plus and minus signs between the second and third columns. At the bottom right, there are two buttons: 'Merge Data' and 'Export Merged Data'.

By default the system will pick same question codes and try to map the questions.



# Export Merged Data- Export Options

The screenshot shows a 'Merge Data' dialog box with the following settings:

- Single Header Row:
- Include Open-Ended Text Data:
- Include Raw Data:
- Display Answer Codes/Index:
- Display Answer Values:
- Display Question Codes instead of Text:
- Show Question Not Displayed:
- Exclude Content URLs (Upload Question Data):
- Include Geo Code & Additional Info:
- Represent Unselected Checkboxes with '0':
- Include Randomization Data:
- Data Filters: Response Status & Date (dropdown)
- Start Date: mm/dd/yyyy (text input)
- End Date: mm/dd/yyyy (text input)
- Response Status: --Select-- (dropdown)

A blue 'Download' button is located at the bottom right of the dialog box.

# Merge Data- Response Viewer

The screenshot shows the SurveyMonkey interface for a survey titled "Product Satisfaction". The top navigation bar includes "Surveys", "My Surveys", and "Product Satisfaction". Below this is a secondary navigation bar with "Edit", "Distribute", "Analytics", and "Integration". The main content area is titled "Response Viewer" and contains a search bar and a table of responses. The table has columns for "Response ID", "Status", "Timestamp (mm/dd/yyyy)", "Time Taken (Seconds)", "Respondent Email", "Email List", "External Reference", "Custom 1", and "Custom 2". A blue box highlights the "External Reference" and "Custom 1" columns for rows 5 through 10, showing values like "Cloned From 9876543" and "Service Satisfaction".

	<input type="checkbox"/>	Response ID	Status	Timestamp (mm/dd/yyyy)	Time Taken (Seconds)	Respondent Email	Email List	External Reference	Custom 1	Custom 2
1	<input type="checkbox"/>	107619524	Completed	02/11/2021 07:39:55	10	jane.doe@emaildomain.com	Email-List-1			
2	<input type="checkbox"/>	107619523	Completed	02/11/2021 06:22:25	13	john.doe@emaildomain.com	Email-List-1			
3	<input type="checkbox"/>	107619522	Completed	02/11/2021 04:39:45	15	j.doe@emaildomain.com	Email-List-1			
4	<input type="checkbox"/>	107619521	Completed	02/11/2021 03:30:05	11	jane@emaildomain.com	Email-List-1			
5	<input type="checkbox"/>	203310555	Completed	01/11/2021 04:15:10	25	john.doe@emaildomain.com	Email-List-2	Cloned From 9876543	Service Satisfaction	
6	<input type="checkbox"/>	203310554	Completed	01/11/2021 03:39:25	35	jd@emaildomain.com	Email-List-2	Cloned From 9876543	Service Satisfaction	
7	<input type="checkbox"/>	203310553	Completed	01/11/2021 03:10:44	30	doe@emaildomain.com	Email-List-2	Cloned From 9876543	Service Satisfaction	
8	<input type="checkbox"/>	302501263	Completed	12/11/2020 03:50:11	15	j.doe@emaildomain.com	Email-List-3	Cloned From 1234567	Customer Satisfaction	
9	<input type="checkbox"/>	302501262	Completed	12/11/2020 03:19:09	20	jane.doe@emaildomain.com	Email-List-3	Cloned From 1234567	Customer Satisfaction	
10	<input type="checkbox"/>	302501261	Completed	12/11/2020 02:20:38	10	john@emaildomain.com	Email-List-3	Cloned From 1234567	Customer Satisfaction	

The source survey details are captured under External Reference by default.

# Multiple Surveys Selected- Horizontal Scroll

Surveys My Surveys > Product Satisfaction

Upgrade Now

Responses 4

Edit Distribute Analytics Integration

Reports Analysis Text Analysis Choice Modelling Merge

Merge Data ?

Survey Service Satisfaction, Customer Satisfaction, Overall ...

Map Questions

Product Satisfaction	Service Satisfaction	Customer Satisfaction	Overall Satisfaction
Q1	Q1	Q1	Q1
Q2	Q2	Q2	Q2
Custom1	Survey Name	Survey Name	Survey Name

Merge Data Export Merged Data

As per the number of surveys selected the horizontal scroll will be added for the source surveys.

# Automatic Question/Variable Mapping using Question Code- Error Screen

The screenshot shows the 'Merge Data' interface in a survey tool. At the top, there's a navigation bar with 'Surveys', 'My Surveys', and 'Product Satisfaction'. Below that, there are tabs for 'Edit', 'Distribute', 'Analytics', and 'Integration'. The 'Integration' tab is active, showing options for 'Reports', 'Analysis', 'Text Analysis', 'Choice Modelling', and 'Merge'. The 'Merge Data' section is titled 'Merge Data' with a help icon. It shows a 'Survey' dropdown set to 'Service Satisfaction, Customer Satisfaction'. Below this is the 'Map Questions' section, which is divided into three columns: 'Product Satisfaction', 'Service Satisfaction', and 'Customer Satisfaction'. The 'Product Satisfaction' column has three rows: 'Q1', 'Q2', and 'Custom1'. The 'Service Satisfaction' column has two rows: 'Q1' and 'Survey Name'. The 'Customer Satisfaction' column has three rows: '--Select--', 'Q2', and 'Survey Name'. A red error message is displayed below the first row of the 'Customer Satisfaction' column: 'Please select the question with same structure.' At the bottom right, there are two buttons: 'Merge Data' and 'Export Merged Data'.

If the system fails to find the question with similar structure in the source survey then an error message will be displayed to the user asking them to select a valid question.



# Any Questions?



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