

# mastersurvey.ai — User Guide (Projects + Surveys)

This guide explains how to use the mastersurvey.ai web app: what each tab/page is for, and the typical workflow from uploading a questionnaire to exporting results.

> Notes

- > - Timestamps in the UI and exports are shown in **IST (24-hour / "railway time")**.
- > - The dashboard pages require login. Respondent survey links do not.

## 1) Start the app

- Start the server (example): `http://127.0.0.1:8006/`
- Optional API documentation: `http://127.0.0.1:8006/docs`

## 2) Top navigation (tabs)

### **Home (/)**

Purpose: landing page and quick navigation.

- Use **Go to Projects** to open the dashboard.
- Use **Login** if you are not signed in.

### **Projects (/projects)**

Purpose: your main dashboard.

- Shows all projects and quick actions.
- From each project card you can:
  - **Open** the project dashboard
  - **Download data (Excel / CSV)**
  - **Data Analysis** (PPT report)
- Use **Create project (upload Excel)** to create a new project.

### **Login (/login) + Forgot Password (/forgot-password) + Logout (/logout)**

Purpose: authenticate to access the dashboard pages.

- If you forget password, use **Forgot Password**.
- Use **Logout** when finished.

## 3) Create a project (uploads)

### **Create Project (upload Excel) (/projects/create)**

Purpose: create a new project and upload a questionnaire Excel.

- Enter a **Project name**
- Upload an **Excel QRE file (.xlsx)**
- Submit to create the project and import the survey.

### **Upload Word (.docx) (/projects/create-docx)**

Purpose: create/import a project survey from a Word questionnaire.

- Upload a **.docx** questionnaire.
- The system converts it into the internal survey format.

### **Word → Excel Converter (/projects/word-to-excel)**

Purpose: convert a Word questionnaire into an **upload-ready Excel QRE**.

- Upload a **.docx** file
- Download the generated Excel
- Upload that Excel into any project using `/projects/create` or the project dashboard upload.

## **4) Project dashboard (most important page)**

### **Project Dashboard (/projects/{project\_name})**

Purpose: manage surveys inside a project.

On this page you will see:

- **Project stats** (surveys, live, completes, incomplete)
- **Survey list** with:
  - Survey title and status
  - Respondent link: `/s/{survey_id}`
  - Created timestamp
  - Export buttons (Excel/CSV)

Key actions on this page:

#### 1) Upload Excel to this project

- Adds a new survey to the same project.

#### 2) Scripting file (edits)

- Downloads a scripting workbook used to do “scripting-style” edits.
- After editing, use **Upload scripting file**.
- Important: scripting uploads are versioned per project (e.g., - v2, - v3).

#### 3) Upload Word (.docx)

- Imports/creates a survey from a Word document into this same project.

#### 4) Word to Excel Converter

- Opens the converter to generate an Excel QRE from Word.

#### 5) Media upload (/projects/{project\_name}/assets)

- Upload images/audio/video used by surveys.
- You can reference assets inside the scripting Excel in `Survey.media` like:
  - `image:logo.png`

- audio:ad.mp3
  - video:clip.mp4
- 6) Download data (Excel / CSV)
- Exports all responses for the project.
  - Includes consistent columns such as:
    - survey\_created\_at, survey\_version
    - NCCS fields (NCCS\_Education, NCCS\_Durables, NCCS\_Code) when applicable
- 7) Download Excel to create survey
- Downloads the template workbook used to create surveys consistently.
- 8) Data Analysis (/projects/{project\_name}/analysis)
- Shows a summary page.
  - **Download PPT** produces a PowerPoint report.

## 5) Respondent survey page

### **Respondent link** (/s/{survey\_id})

Purpose: the actual survey interview experience.

- Respondents open the link, answer questions, submit.
- Skip logic / termination rules are driven by the scripting metadata.

## 6) Common workflow (recommended)

- Login → **Projects**
- **Create project**
- Upload questionnaire:
  - Option A: Upload Excel QRE
  - Option B: Upload Word .docx (or Word → Excel → upload Excel)
- Open the project dashboard → verify survey link
- If needed, download **Scripting file (edits)** → modify → **Upload scripting file**
- Share respondent link(s)
- Export results (Excel/CSV) or generate PPT analysis

## 7) Export notes

- Exports are designed for analysis in Excel.
- Timestamp fields are in IST and 24-hour format.

## 8) Troubleshooting

- If server port 8007 fails with a Windows permission error, run on another port (e.g., 8006) and update your APK/web config to match.
- If Word→Excel conversion says “Could not detect any questions”, the Word format may differ; share the doc structure for parser tuning.