Creating a Survey

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Creating a New Survey

You can create a new survey from scratch or by copying existing surveys. To begin creating a survey you must first register with Surveyi. Once your account is validated or your initial payment has been processed you will be taken to the surveys homepage. Steps to create a survey from scratch are as follows:

Step 1: Create New Survey from the options menu at the top left side:
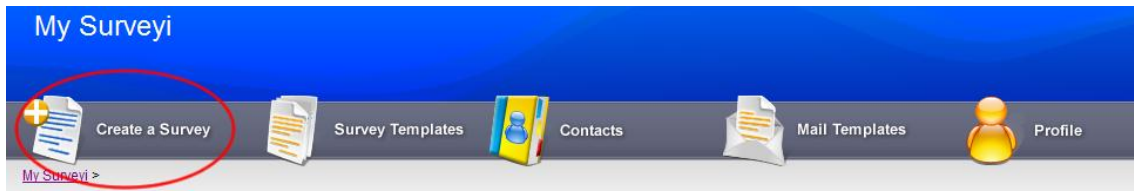
Step 2: Choose a name for your survey:

The survey name is for your reference only and the display name is what users see when they access your survey. The display name will appear at the top of your survey if you have it enabled, and can also represent part of the link to your survey if your account type has custom survey access links. Note that the survey name must be unique among your surveys and any user with your organisation name.

Step 3: Edit your questions:

At the top of the page you can pre populate your survey with questions from any of our sample surveys. Just select the survey you'd like to populate from and click **Apply**. If there are no templates which are suitable as a starting point you can start with an empty question list. Click the **Edit** or **Add** buttons to add questions to your survey.

At the top of the form are the page buttons which allow you navigate through each page of your survey. Click on a page to edit questions for that page, or click on the **New Page Before** or **New Page After** buttons to add new survey pages. To set a title for each page, and control question randomisation (if your account has that facility) click **Page Properties**.

For more information on questions and pages, see **Adding Questions to your Survey** later on in this document.

Step 4: Change your survey appearance:

Control your survey appearance by selecting the template you'd like to use from the list at the top of the page. If you have your own survey templates they will appear here. By default only **Global templates** are shown unless you have your own survey templates or buddy shared survey templates available in which case they are selectable from the option above the global templates. To select global templates click on the template image, or to apply your own or buddy templates click the **Select** option in the template list. Templates can be changed at any time during the life of the survey and even after launch.

Step 5: Start, finish and offline pages

Custom pages appear separately from your survey questions but follow your survey styling. You can use them to create a custom message which will appear for your survey participants before, or after they complete your survey questions. You can also set a custom **Offline Page** which will appear if your survey is inactive for any reason and someone tries to access it. Use **Finish Page** option to set a survey **Redirect Url** (if your account type has it enabled) to redirect your survey participants to any web page of your choice after they have completed your survey. Note that the Redirect URL option works even if you don't have the finish page enabled.

If you have multiple response groups active, you can set different custom pages for each by selecting them from the dropdown menu at the top of the page, which will only appear if your survey has multiple response groups.

Step 6: Preview your survey

To get a full impression of how your survey will appear before launching it, you can view a full preview of it from the **Preview** page. Your survey may appear differently for each response group, depending on which start or finish pages you have enabled. Each response group is listed on this page, and to view its corresponding preview click on the **Preview** button to open the survey preview in a new window. You can also use this approach to test the finish page or redirect URL if you have one enabled.

Step 6: Share your survey

Before you launch your survey you may want to share it with colleagues for review purposes. You can either do this by launching your survey and sending out test invitations from the **Distribute** page, or you can send out a preview link from the **Share** page which will give an impression of how the survey will appear when it is launched.

If you have **Surveyi Buddies** you can give them editing rights to your survey if you enable sharing for it. You have the option to share the preview and results only, or you can allow full sharing which lets your buddies edit the survey questions, launch it and have the same level of control over your survey that you do. You can also transfer full ownership of your survey to any of your Surveyi buddies.

If you'd like to build up a collective bank of questions with your Surveyi buddies, you can do so on this page by sharing individual questions at the bottom of the page. To enable or disable sharing for a question, click on the **Share/Unshare** icon.

Step 7: Launch your survey

Before you can start collecting responses, the question content must be locked so that existing responses are not invalidated by any changes. To do this, you must launch your survey by clicking on the **Launch** wizard icon. Once your survey is launched, the launch icon will change to the **Reset** icon. The reset button lets you unlock the edit more once more, but will remove all collected responses from your survey. If will also unlock the **Responses** and **Charting** pages which allow you to view and analyse your responses.

Step 8: Distribute your survey

When you have launched your survey and are ready to collect responses, click on the **Distribute** wizard icon. In simple mode, you will be provided with a simple web link for your survey which you can email to your intended participants, or publish on your website.

You can also configure a **popup survey invitation** which will display a configurable invitation popup box which will appear on your website if you copy and paste the code provided into the relevant sections of your HTML. If you would like the survey to appear directly on your website, you can configure this by selecting the **Embed** option so that your participants never need to leave your website to participate in your survey.

If you prefer the more traditional paper based methods of data collection, you can print your survey as a PDF document and then enter the results into Surveyi using the provided web link at a later stage.

If you choose to distribute in **Advanced Mode** you can use Response Groups to have more control over the distribution of your survey. Response groups can be either **web link** groups, or **tracker** email invitation groups:

Web link response groups have more options than open access and include options for SSL, custom web links, start and finish dates, limiting the numbers of responses, and single access only (which stops one user completing the survey multiple times).

Tracker response groups allow you to send out email invitations to each participant using your Surveyi contact lists. Each email sent out can then be tracked so that you know which individual has responded and what their response was. You can use invitation templates to design both invitations, and reminders, and choose the type of email you'd like to send. There are options here for sending preview messages to ensure that the emails work with your intended recipients and their email clients.

For more information about distributing surveys, see the help guide **Collecting Responses**.

Your survey is now created and you will be able to access its Survey Options page from your Surveyi user home page by clicking on **My Surveys**. A list of all your surveys will be shown along with the status and response counts for each.

Copying an Existing Survey

Once you have surveys created they will be listed on your Surveyi homepage which is accessible by clicking on **My Surveyi** at the top of each page. To copy a survey click on the copy icon for the survey in the list you would like to copy. Note that if you have Surveyi buddies with shared surveys they will also appear in the list below for you to copy.
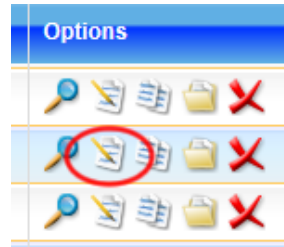
Once you have clicked on the copy survey button you will be presented with the **Create Survey** page. To continue enter your chosen survey name and then **Continue** to get to the Survey Options page.

Adding Questions to Your Survey

To add questions to your survey click the **Questions** wizard icon on the survey designer:

Initially the Edit Survey Questions page shows one survey page with no questions. To add a question click **Add Question** at the bottom to take you to the **Edit Question** page. The first thing you might want to choose is the question type. For full details on question types please visit the Questions Types page. Different question types have different options tabs on the page which can be described as follows

Text – enter what you want to ask your users. You can also enter extra text which will pop up if the user clicks on a question help icon.

Required – if you require an answer to this question before moving onto the next page then check the tick box on this tab. You can also enter the message the survey user will see under the question if they haven't completed it when they try to move to the next page.

Validation – this tab has more advanced validation options which change for different question types. For example numeric text boxes allow you to specify a range of values.

Conditional – allows you to set up question logic for whether this question is shown or hidden based on the answer to multiple choice questions in your survey. Question logic works across pages on your survey or for questions on the same page.

Layout – control how the question is laid out on the survey page including spacing options and question numbering.

Import – import another question from this survey or others in your survey list. If you have Surveyi buddies you can select their questions to import.

Choices – if the question is a multiple choice type you can enter the choices here, one on each line. You can also specify whether the choice order is displayed differently each time the question is loaded, and an additional **Other** option which places a underneath for the user to enter specific information about their other option. If the question is randomised the other option will always appear last.

Rows – if the question type allows for multiple rows enter the rows here, one on each line.

Columns – enter the column options for table question types here, one on each line. For dropdown list table question types this is where you can enter individual column choices for the question.

Totals – if the question type is numeric you can specify a total sum which all numeric values entered on each row must be equal to for the response to be valid

Comment – non numeric question types have the option for the survey user to leave a comment related to their response. Enter the text label you would like to appear above the comment box here and indicate whether you would like the comment to be entered before the user can move onto the next page.

Scoring – if the question type can have a quantifiable response such as numeric or multiple choice, a score can be allocated for certain response values. This score is invisible to the survey user and you can filter the responses by their score after they have arrived.

Responses – if the question type can have a quantifiable response such as numeric or multiple choice, you can display existing results to your survey users either underneath the question, at the end of the survey on the finish page (if one is defined), or both.

Demographic – if the question type is demographic question types this is where you can enter the address information. Each field can be selected to be displayed in the survey, and certain fields can be marked as required.

When the required information is defined in the question, click **Update Preview** to view the question as it will appear on your survey (without the survey style enabled). If you have set validation rules then you can test them prior to launching your survey by entering information in the question as a survey user would and then clicking **Test Validation**.

Copying Questions

To copy any question in your survey click the Questions buttons to go to Edit Questions and underneath the question you would like to copy click the orange **Copy**. When this is clicked, orange icons appear between the questions. Click the icon in the relevant position to copy the question to that location. Otherwise, click on the yellow page numbers above the questions to copy the question to that page.

Deleting Questions

To delete a question click the **Delete** button underneath the question on the Edit Survey Questions page. The question will be moved to the survey recycle bin and can be restored later if it was deleted by accident.

Managing Pages

When each survey is created it contains a survey page. To add more survey pages click insert before, or insert after. A new page icon in sequential numeric order will appear above the questions. Click on the numbered page icons to change the question list below to that page.

Page Properties

To manage settings for each page click **Page Properties**. The following options are available:

Page Title – set the title for this page. This will appear in the position specified in the applied survey template or appearance settings.

Random question order – enable this option if you would like the questions on this page to appear in a different order each time the page is shown to a survey user.

Page Skip Logic - if your survey has multiple choice question types you can use these to show or hide this page based on the choice which the survey user has selected.

To delete a survey page click on the Delete button at the top of the **Edit Survey Questions** page. Any questions will be moved to the recycle bin. If any of those questions are later restored, the survey page will also be restored and will contain the restored question only.

Previewing the Page

To preview each page from the Edit Survey Questions page click on the **Preview Page** wizard icon on the survey designer, and then click the **Preview** button for any response group in the list. Note that the survey can also be previewed from your Surveyi user home page.