

Creating a Survey

Step 1: Access Your Account

[Sign into](#) your account and follow these steps to create a survey in the PsychData tool.

Step 2: Initial Survey Setup

There are two ways to approach creating a survey:

1. Create a folder, then your survey
2. Create a survey without placing it in a folder (You can do so later if you choose.)

On the Surveys page, locate the “+ Folder” and “+ Survey” buttons at the top of the page.

You are not required to create folders to organize your surveys. It is an option that is provided to help manage an account with many surveys.

If you do decide to use the folders feature, it is up to you if you want to create the folder before or after creating the survey.

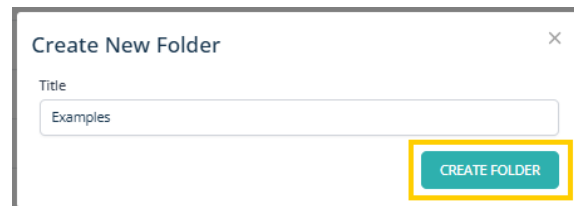
[Create a Folder \(Optional\)](#)

If you intend to create a folder, click on the “+ Folder” button at the top of the screen.

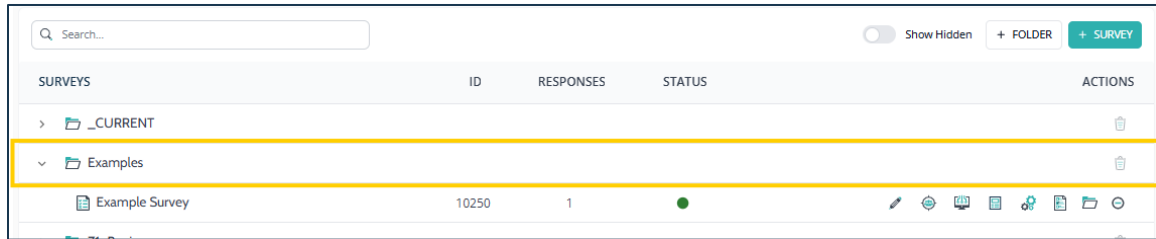


A popup will appear that prompts you to enter your desired title for your new folder.

Once you’ve entered the title, click the “Submit” button in the bottom right-hand corner of the popup.



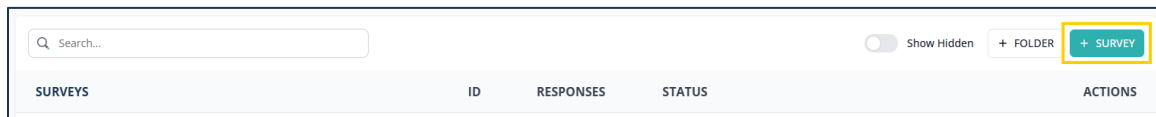
This will redirect you back to your list of surveys. The new folder will appear within the list of surveys, as pictured below.



| SURVEYS | ID | RESPONSES | STATUS | ACTIONS |
|----------------|-------|-----------|--------------------------------------|---------|
| > _CURRENT | | | | |
| ▼ Examples | | | | |
| Example Survey | 10250 | 1 | ● | |

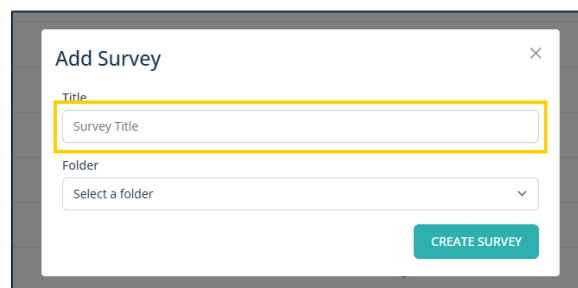
Create Survey

Create a survey by clicking the “+ Survey” button at the top right-hand corner of the screen.



A popup will appear.

Enter your desired survey title in the field that says “Survey Title.”



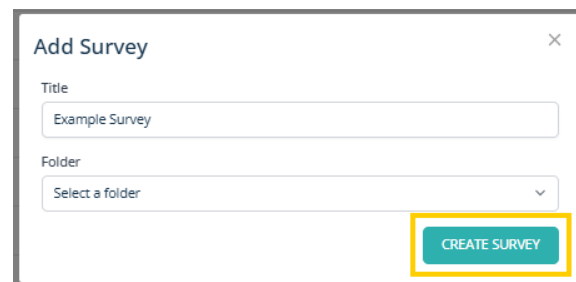
Add Survey ×

Title

Folder

CREATE SURVEY

There will be a second field below the “Survey Title” field that says “Select a folder.” Here you can select an existing folder. If there are multiple folders in your account, a dropdown menu will appear when you click into the field.



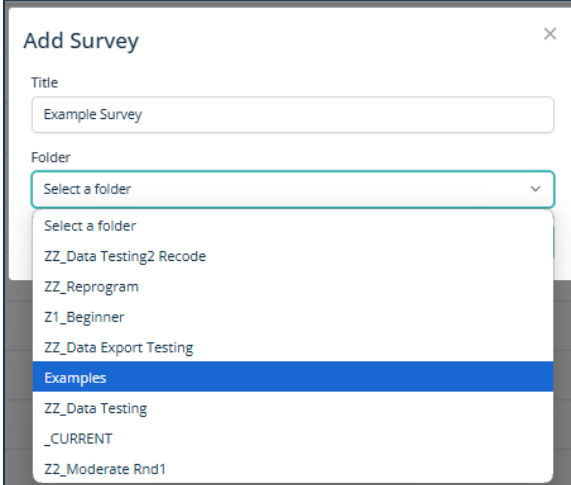
Add Survey ×

Title

Folder

CREATE SURVEY

As you can see below, if you created a folder previously, the folder appears in the dropdown.



Add Survey [X]

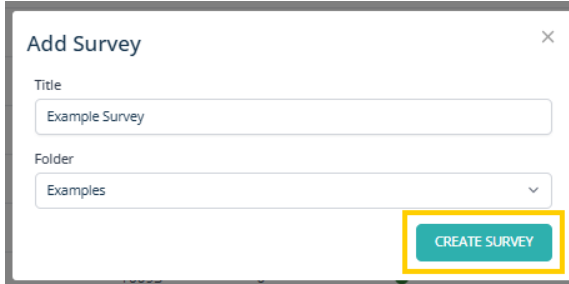
Title
Example Survey

Folder
Select a folder [v]

- Select a folder
- ZZ_Data Testing2 Recode
- ZZ_Reprogram
- Z1_Beginner
- ZZ_Data Export Testing
- Examples**
- ZZ_Data Testing
- _CURRENT
- Z2_Moderate Rnd1

If you chose not to create a folder, you can leave this field blank the survey will be saved independently, outside of the folders.

Once, you've made your entries, click the "Create Survey" button in the bottom right-hand corner of the pop-up.



Add Survey [X]

Title
Example Survey

Folder
Examples [v]

CREATE SURVEY

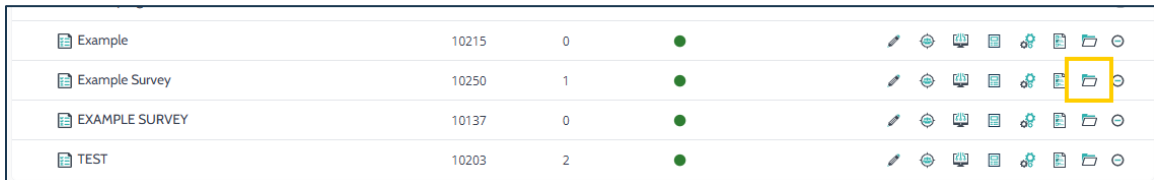
You can also choose to move a survey into a folder after it is created.

As you can see below, the folder, “Examples,” we created is visible in the list. Yet, because our example survey, “Example Survey,” was not assigned to a folder, it was saved independently, outside of the folders, also indicated below.



| Survey Name | Count | Version | Status | Actions |
|--------------------------|-------|---------|--------|--|
| Examples | | | | [Trash] |
| > Z1_Beginner | | | | [Trash] |
| > ZZ_Moderate Rnd1 | | | | [Trash] |
| > ZZ_Data Export Testing | | | | [Trash] |
| ZZ_Data Testing | | | | [Trash] |
| ZZ_Data Testing2 Recode | | | | [Trash] |
| ZZ_Reprogram | | | | [Trash] |
| Example | 10215 | 0 | ● | [Edit] [Share] [Print] [Export] [Refresh] [Move] [Trash] |
| Example Survey | 10250 | 1 | ● | [Edit] [Share] [Print] [Export] [Refresh] [Move] [Trash] |
| EXAMPLE SURVEY | 10137 | 0 | ● | [Edit] [Share] [Print] [Export] [Refresh] [Move] [Trash] |
| TEST | 10203 | 2 | ● | [Edit] [Share] [Print] [Export] [Refresh] [Move] [Trash] |

From the Survey List page, you can assign a survey to a folder by clicking the “move survey” icon that you’ll find next to the survey.

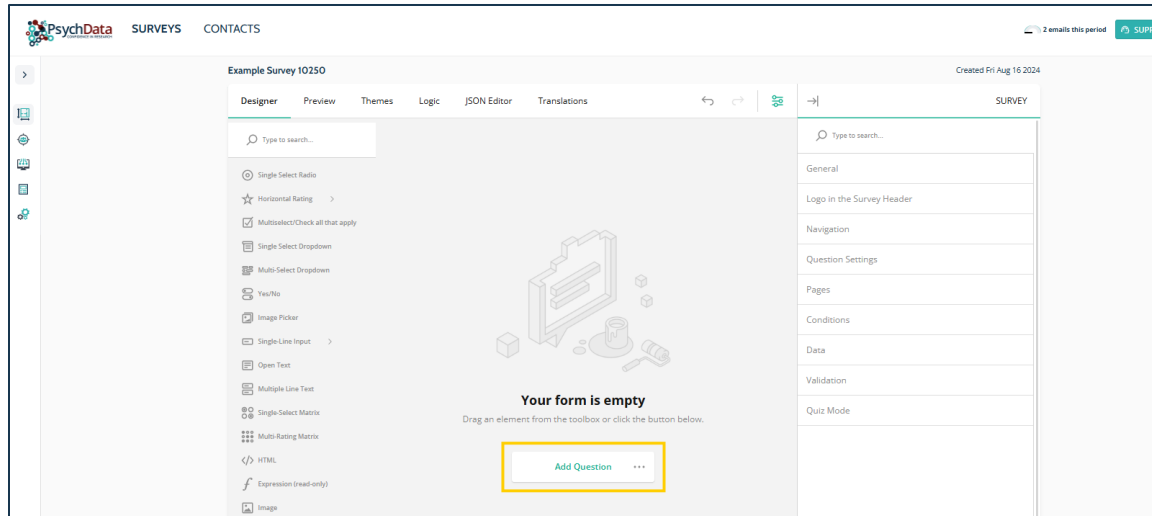


| | | | | |
|----------------|-------|---|---|--|
| Example | 10215 | 0 | ● | [Edit] [Share] [Print] [Export] [Refresh] [Move] [Trash] |
| Example Survey | 10250 | 1 | ● | [Edit] [Share] [Print] [Export] [Refresh] [Move] [Trash] |
| EXAMPLE SURVEY | 10137 | 0 | ● | [Edit] [Share] [Print] [Export] [Refresh] [Move] [Trash] |
| TEST | 10203 | 2 | ● | [Edit] [Share] [Print] [Export] [Refresh] [Move] [Trash] |

Step 3: Add a Title

After you click create survey, you will be redirected to the Survey Design page within the survey, pictured below.

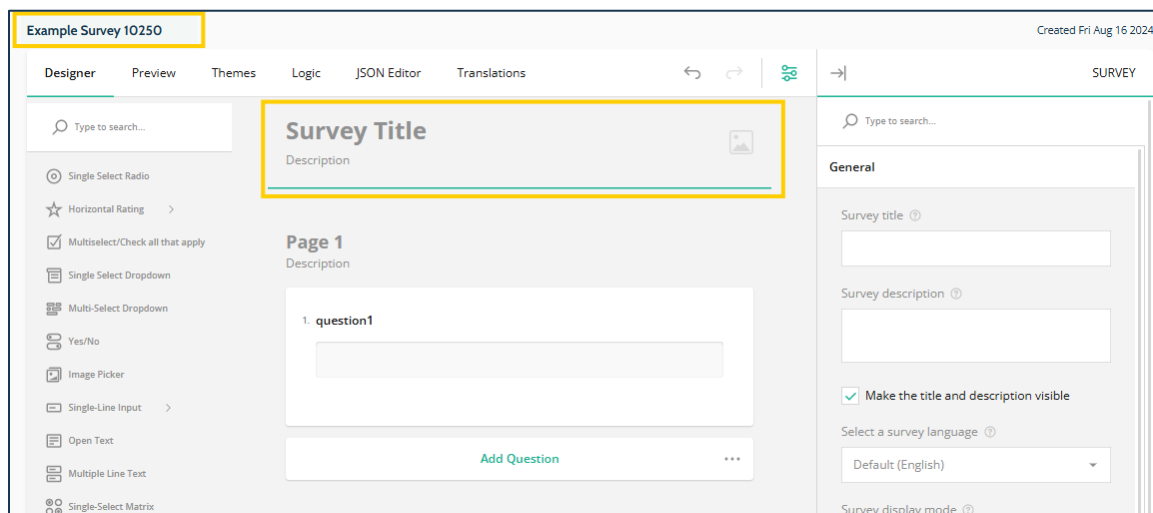
Now you will need to name the survey. To do so, you will need to add a question into the survey by clicking the “Add Question” button in the middle of the design screen.



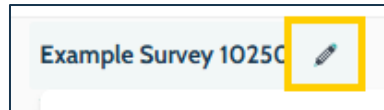
Each survey has two titles, indicated below:

1. A title that is visible to whomever is programming the survey, not participants (upper left-hand corner) This should already display the title you entered when you created the survey and some autogenerated numbers.
2. A title that is visible to participants (top and center of the survey area in the middle of the screen)

Having a different title that participants cannot see can be useful in many ways, for example, if different participant groups receive different surveys or if you have logic that redirects the participants from one survey to another based on their answers, etc.



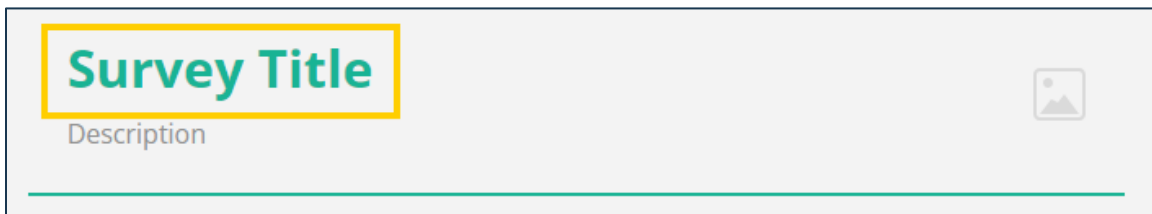
To change the existing survey name that is visible only to the person programming the survey, hover your cursor over the existing name and a pencil icon will appear to the right. Disregard the numbers to the right of the name, they are autogenerated and cannot be edited.



Click the icon (note that the numbers, or survey ID, disappear) and type in your desired name in the field which is now able to be edited and when you are finished click the checkmark to save. (note that the numbers reappear, this is normal)



To change the existing survey name that is visible to the participant, click on the Survey Title.



Enter your desired title and click anywhere outside of the field to save.