

Building a Survey

Overview — The Survey Composer

The Composer is where you assemble the activity's survey: its title, its expiry date, the questions it asks, and the wording that opens and closes it.

Open it from the activity's menu under **Survey ? Composer**. If the activity has no survey yet, use **Create Survey** first.

GOOD TO KNOW An activity holds one survey. If you need a genuinely separate survey, that means a separate activity.

HEADS UP Without survey write access the Composer opens read-only — you can read the survey but every field is locked and the save button is disabled.

HEADS UP The survey composer does **not** autosave. Building a survey takes a while and there is no draft recovery here — press **Save Survey** at every natural break point. See *Autosave & Drafts*.

[image.png](#)

Survey Details

Field	What it does
Activity Survey Title	The title respondents see at the top of the survey.
Expiry Date	The last day the survey accepts responses, chosen from a date picker.

HEADS UP Once the expiry date passes, anyone opening the link sees **The Survey Expired** and cannot respond. Set the date with room to spare.

PRO TIP Set the expiry a week beyond your intended close. Response rates always tail in late, and an expired link is a far worse problem than a survey that stayed open a few extra days.

The Four Question Sections

Section	Holds
Demographic	Questions about the respondent — department, level, site, tenure, employment type.
Cultural Pattern	Rated questions feeding cultural pattern analysis and the CPRO report.
Safety Culture	Rated questions feeding safety culture analysis.
Other	Questions that do not belong to the analytical categories above.

GOOD TO KNOW A question's section is fixed by its category in the question pool — you cannot move a question between sections here. If a question is in the wrong section, it was filed under the wrong category when it was created, and an administrator needs to publish a corrected copy.

HEADS UP Demographic questions are what make the report breakdowns work. A survey with no demographic questions still produces results, but the demographic comparison charts will have nothing to compare.

Adding Questions

Questions come from the question pool — the shared library an administrator maintains. You select from it rather than typing questions here.

HEADS UP Only **published** questions appear. If a question you expect is missing, it is likely still an unpublished draft, has been deprecated, or belongs to another utility. That is an administrator matter.

PRO TIP Build the survey from questions that have been used before wherever you can. Reusing the same questions across assessments is what makes the Trending Report meaningful.

Question help text

Each question can carry **Question Help Text** — a clarification shown to respondents alongside it. The question text itself is read-only in the composer, since it belongs to the pool.

PRO TIP Help text is the cheapest quality improvement available to you. Where a question uses a term your site reads two ways, define it here rather than hoping respondents agree.

Ordering Questions

Each question has **Move Question Upward** and **Move Question Downward** controls, and a delete control to remove it from the survey. Questions can also be dragged into place directly.

PRO TIP Put demographic questions first. Respondents answer them quickly, which builds momentum, and it means that if someone abandons the survey part-way you still know who they were.

GOOD TO KNOW Deleting a question removes it from **this survey only**. The question stays in the pool for other surveys to use.

Text Blocks

Add Text block inserts a block of your own wording between questions. Text blocks are not questions — they collect no answer.

PRO TIP A short text block before each section tells respondents what is coming and why. Surveys that change subject with no warning get rushed, inconsistent answers in the questions immediately after the switch.

Header and Footer

Add Header Content and **Add Footer Content** set the wording that opens and closes the survey. Once added, the same controls become **Edit Header Content** and **Edit Footer Content**.

PRO TIP The header is where response rates are won or lost. Say who is running the assessment, why it matters, roughly how long it takes, and how responses will be handled.

GOOD TO KNOW Use the footer for what happens next — when results will be shared, and who to contact with questions.

Saving

Save Survey commits your work. **Clear Survey Question Data** empties the question sections.

HEADS UP Clear Survey Question Data removes all the questions you have assembled. It is not an undo — you will be rebuilding the survey from the pool.

HEADS UP There is no autosave and no draft recovery on this page. Save often.

Previewing

Preview Survey shows the survey exactly as a respondent will see it — header, questions in order, text blocks, rating options, and footer.

PRO TIP Always preview before sharing the link. Ordering mistakes, missing help text, and a section that reads abruptly are obvious in the preview and invisible in the composer.

Getting the Survey Link

Get Survey Link generates the public link respondents use. The dialog — **Survey Link Generated** — shows the URL with two actions:

Action	What it does
Copy	Copies the link to your clipboard.
Open	Opens the survey in a new tab.

If copying fails, the dialog shows *Failed to copy link. Please try manually.* — select the text in the field and copy it yourself.

GOOD TO KNOW *Fixed in PROD Round 1.* The generated link is now clean and ready to paste. It previously came wrapped in angle brackets, which some mail clients and chat tools carried through into a broken link. If you have an old link saved with `<` and `>` around it, regenerate it.

HEADS UP If you see **Survey Link Unavailable** — *"The survey link could not be retrieved. Please ensure the survey has been saved and try again."* — the survey has unsaved changes. Save Survey first, then request the link.

GOOD TO KNOW The link carries a language. It is generated in your current language, so switch language before generating if you need the other one.

PRO TIP Respondents need no account and no sign-in — the link is all they need. That is what makes it safe to circulate widely, and also why you should treat it as public.

Common Problems

What you see	What it means
Composer opens but nothing can be edited	You have survey read access without write.
Create Survey greyed out	No write access, or a survey already exists.
Survey Link Unavailable	Unsaved changes. Save the survey, then try again.
The pasted link does not work	Regenerate it. Old links were wrapped in angle brackets some tools carried through.
A question is missing from the pool	Unpublished, deprecated, or another utility's. Ask an administrator.
A question is in the wrong section	Its pool category is wrong. An administrator must publish a corrected copy.
Respondents see The Survey Expired	The expiry date has passed. Extend it in the composer.
Cannot change the rating scale	Responses already exist — the scale type is frozen.
Everything read-only including the title	The activity is locked.
Link is in the wrong language	It follows your current language. Switch, then regenerate.
Lost work after a session expiry	The composer does not autosave. Save as you build.

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