





# Create a survey

1. Click on 'MY SURVEYS' and the 'Create a survey' option.



2. Select which survey type you would like to create. [Click here for more information on the different survey types.](#)

3. Add a survey title and click 'Create'.

Your survey will now appear within the 'List Surveys' screen (*the default screen for the survey admin tab*). The list surveys screen displays all of your surveys, the date they were created, the number of responses currently received and whether the survey is open (*can still receive responses*) or closed.

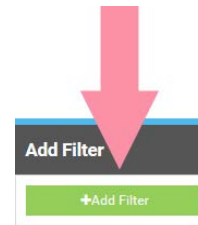
Date Created	Survey Name	Add Filter	Number of responses	Status
23/03/2017	Demo company survey	+Add Filter	0	Open

# Add a survey filter

Filters can be added to your survey to enable you to filter your reports by specific categories. For example, you may wish to filter your reports by different departments within your organisation, such as 'Sales' and 'Purchasing' departments.

To add a filter to your survey:

1. Click on the 'Add Filter' button within the list survey screen.



2. Enter the title of your filter e.g. Department.

3. Enter the response option values and text for the filter. These are the options employees can select when viewing the filter question e.g. Sales, Purchasing. The response option value and text should be the same. Five options are presented. You do not have to complete all five. Simply fill in the rows you need and click 'Save'. You can also add more response options by clicking the 'Add' button.

**Add element**

**Title**

Department Key:  
department

This is used as a descriptive label when displaying this webform element.

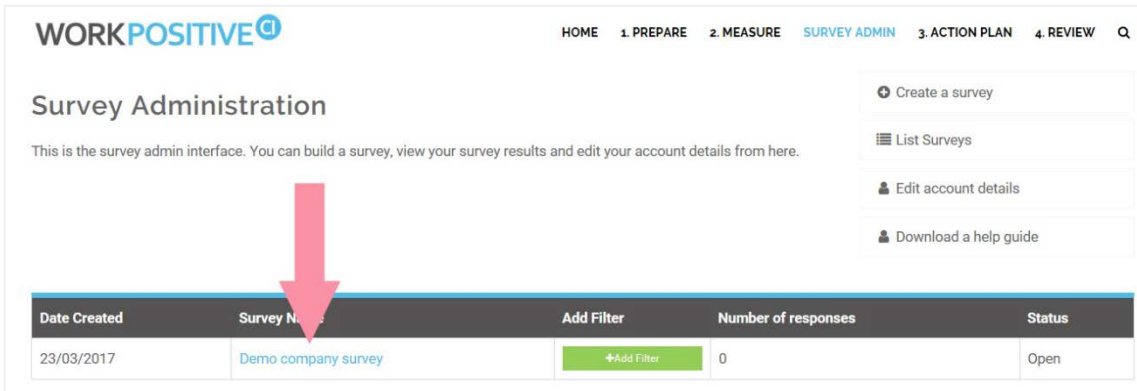
**Options**

Option value	Option text
Sales	Sales
Purchasing	Purchasing   <input type="text"/>
Enter value	Enter text
Enter value	Enter text
Enter value	Enter text

4. Once completed click 'Save' to go back to the 'List Surveys' screen. Your filter has been created.

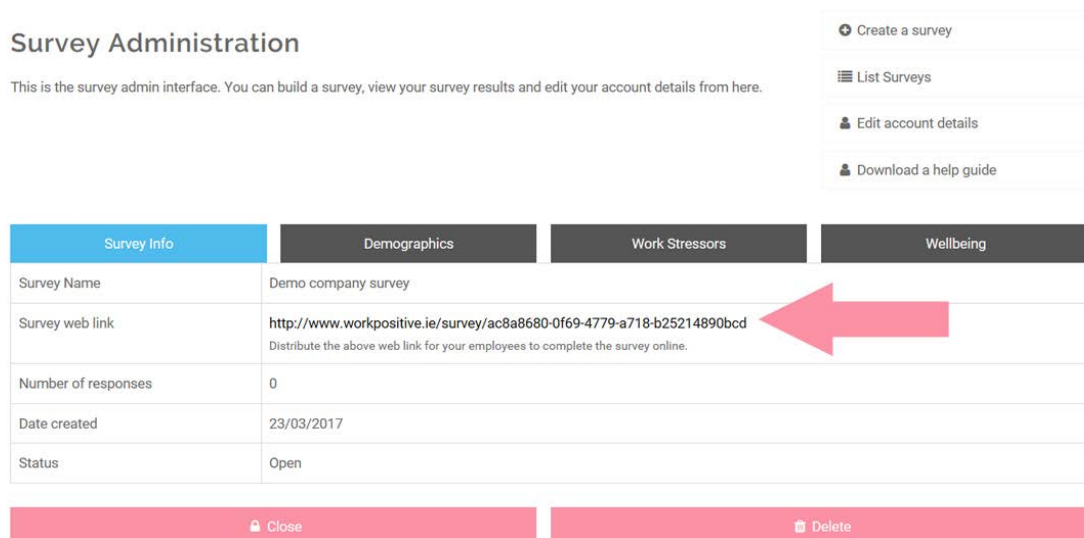
# Understand the 'List Surveys' screen

The list surveys screen displays all of your surveys, the date they were created, the number of responses currently received and whether the survey is open or closed.



By clicking on a survey name you can:

- Access your unique survey web link
- Access any survey reports (*as long as five or more responses have been received*)
- Close a survey (*no more responses will be collated*)
- Delete a survey



**The Survey web link should be disseminated for employees to complete the survey.**

To manually input data from paper-and-pencil questionnaires (printed versions), the process is as follows:

- Click on the survey web link and input the data from one completed questionnaire.
- Repeat the above process until the data for all employees has been entered.

**It is essential that confidentiality and anonymity is maintained throughout this stage and staff should be confident that, whatever return policy is chosen by the organisation (general or individual return), will ensure that no information will be compromised.**

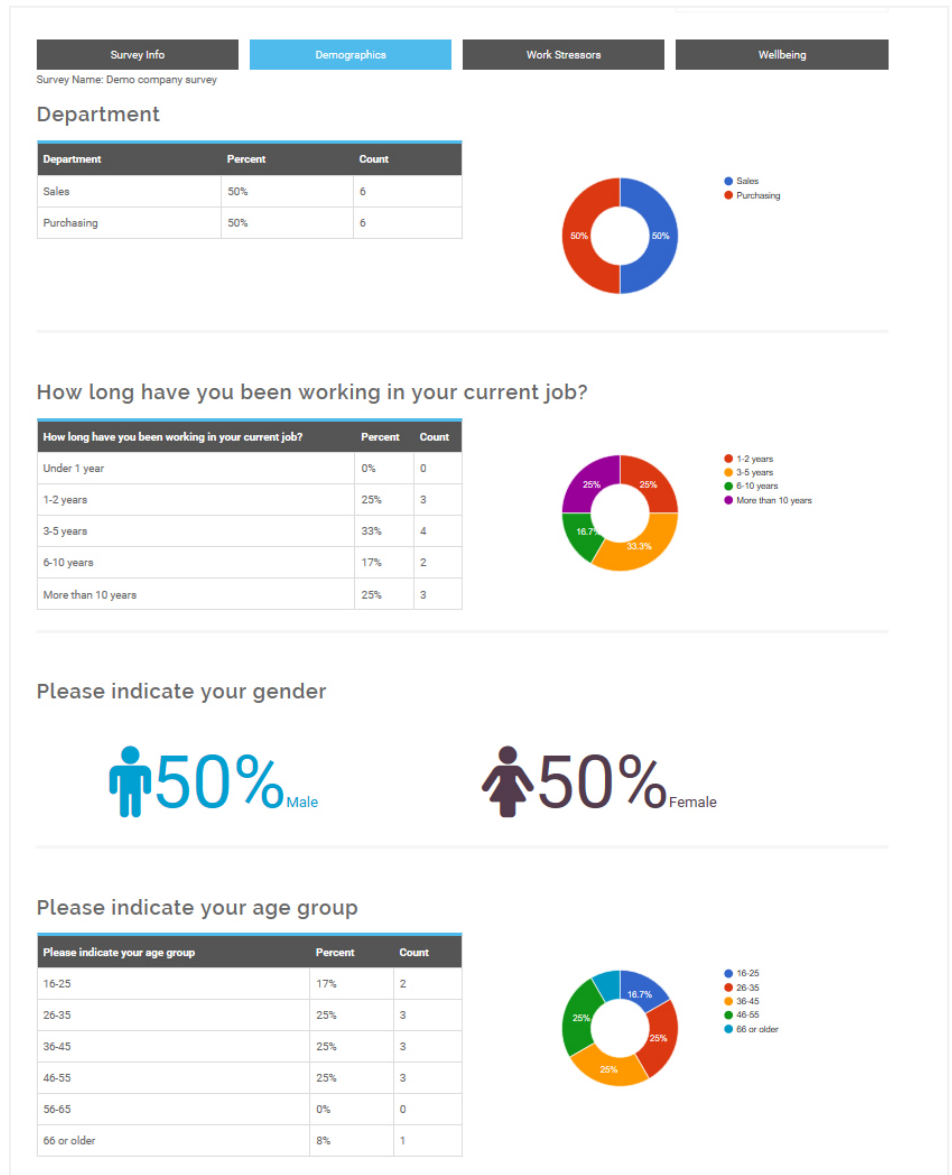
# Survey Reports

Once there are five or more survey responses to a survey you can access your instant survey reports. Reports are divided into the following sections:

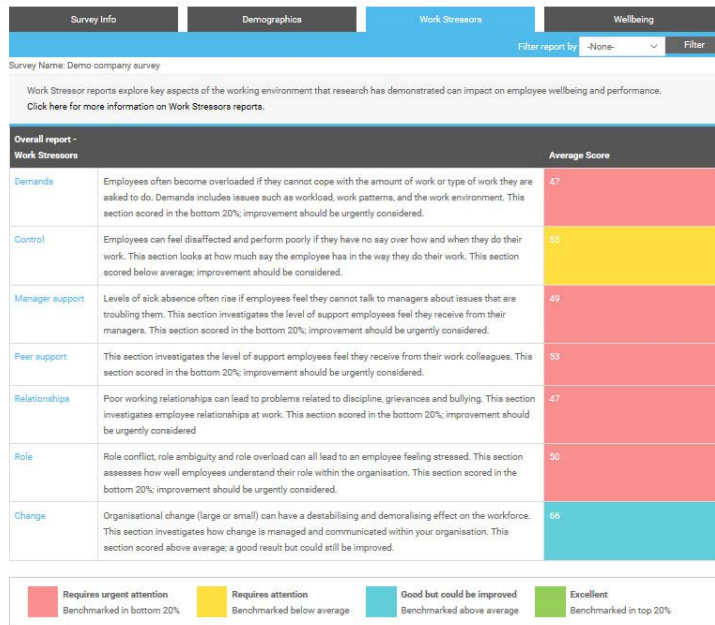
- **Demographic**
- **Work stressors**
- **Wellbeing**
- **Critical incident (if selected)**

Demographic reports will provide a breakdown:

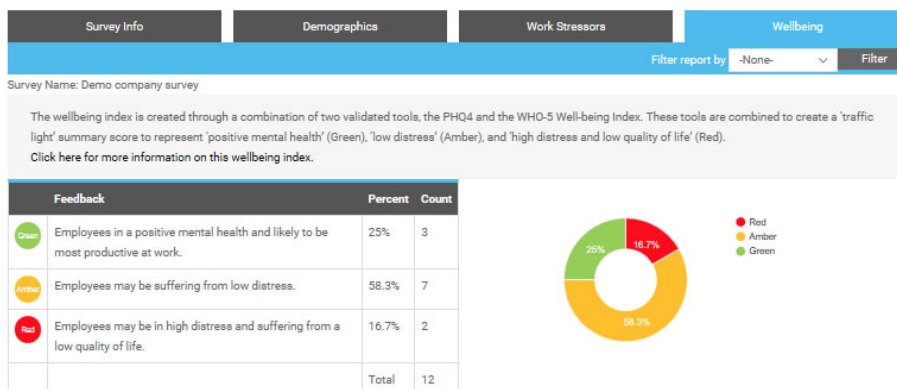
- Filter responses (if a filter was added)
- Employee tenure in current post
- Gender
- Age



**Work Stressors reports** explore key aspects of the working environment that research has demonstrated can impact on employee wellbeing and performance. Work Stressors report identify risk areas and provide clear guidance on ways to improve employee wellbeing, enabling focused action to be taken. [Click here for more information on Work Stressors reports.](#)

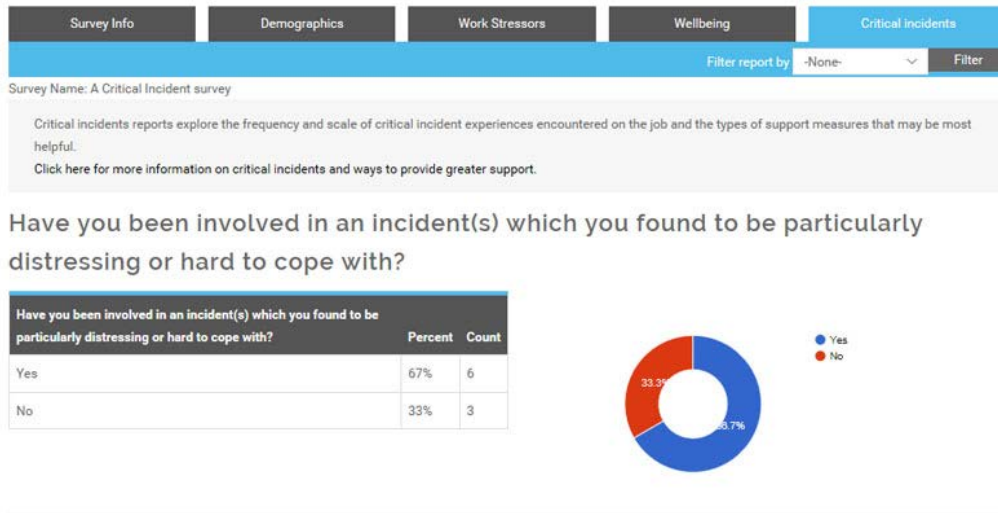


**Wellbeing reports** explore the psychological wellbeing of the survey respondents. A wellbeing index was created through a combination of two validated tools, the PHQ4 and the WHO-5 Well-being Index to create a 'traffic light' summary score to represent 'positive mental health' (Green), 'low distress' (Amber), and 'high distress and low quality of life' (Red). [Click here for more information on this wellbeing index.](#)



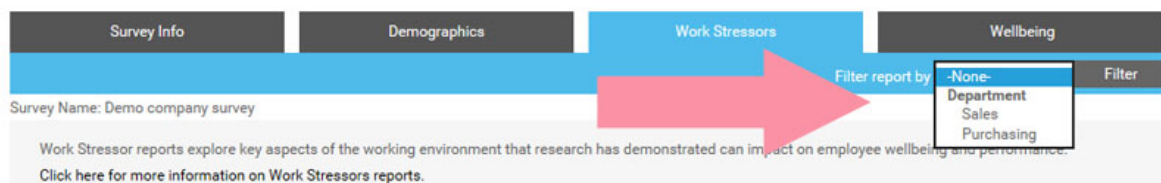


**Critical Incident reports** explore the frequency and scale of critical incident experiences encountered on the job and the types of support measures that may be most helpful. [Click here for more information on critical incidents and ways to provide greater support.](#)



## To filter reports

To filter your survey reports simply click on the **'Filter report by'** drop down tab on report screens. *To maintain confidentiality you cannot filter the demographic report screen.*



## Edit Account Details

To edit your account details - click on the 'Edit account details' option within the survey admin tab.