Creating and Granting Access to Folders in Your SurveyAnalytics.com Account

With SurveyAnalytics.com, you can create multiple surveys for any number of data collection activities simultaneously. To successfully coordinate multiple surveys, you’ll want to organize surveys into folders. You can then grant access to certain folders so that select devices can collect data for specific surveys. In this way, you can share your surveys with other agencies without having to share passwords or grant access to your entire account. Here are the steps for managing folders in your SurveyAnalytics.com account.

Creating and Populating Folders

- Select “Add Folder” located on the left side of the “Surveys” tab in your SurveyAnalytics.com account

- Name the folder with a descriptive title, e.g. “Retail Campaign 2014,” or “Public Intercept Survey 2014.” Then select “Create New Folder”

- The newly created folder will then show up on the left hand side of the “Surveys” screen, below the “Main/Default” folder. Select the folder, and in the next screen, you can “Create a New Survey” to be stored in that folder

  - To move a survey into a folder, navigate to the survey, select “Options” to the right of the survey, and from the drop down menu select “Move”

  - On the “Move Survey” page, select the appropriate folder from the drop down menu, and select “Move Survey”
Granting Access for Devices

1. Go to the “Mobile” tab
2. Check the box for the device(s) you want to access your folders, and select “Bulk Edit Key”
3. Select the desired folder from the drop down menu under “Folder”
4. Then select “Save Device Key”

When managing device access to folders, here are some things to keep in mind:

- You only have two choices when it comes to assigning folders to mobile devices. You can assign EITHER a single folder or all the folders in your account. This means you'll have to be strategic about organizing survey into the right folders.

- You can organize multiple surveys to one folder. For example, if you had separate versions for each jurisdiction, you'll want to name each version distinctively but store all the surveys into one folder. This way, the device can be granted permission to access to all the versions, and data collectors can select the version they need.

- Most importantly, whenever you make changes to your surveys, folders, or device key settings, you will need to synchronize your devices with your account. To do so, the mobile devices need to be connected to an active Wi-Fi (see next page for details).
**SWITCH TO A MOBILE DEVICE CONNECTED TO THE INTERNET**

1) Open the SurveyPocket app

2) Select the gear icon at the BOTTOM RIGHT of the screen

3) Select “Synchronize”

4) Confirm that the correct survey(s) appear on your device

**Granting Access for Other Users**

It is possible to share surveys and questions between different accounts using SurveyAnalytics. This allows multiple Prop-99 projects to collaborate in developing surveys which can be especially useful for sharing translations of a survey. Or if you’re an external evaluator with multiple projects, you can have access to your clients’ accounts.

The owner of the folder needs to:

1. Select the folder you want to share

2. Select “Settings” next to the name of the folder

3. Select the account(s) to grant access to your folder

4. Scroll to the bottom of the page, and select “Save changes”

The selected accounts now have access to all surveys in the folder you shared. These accounts can edit surveys, copy surveys into their own accounts/folders, send invitation for respondents to take the survey online, see the data collected, and run reports. However, until they copy the survey into their own account, these users will not have the ability to assign this survey to devices and collect data. You can only collect data on handheld devices for surveys that are housed in your own account. This is because of the way devices keys synchronize.

It is recommended to grant TCEC access to your folders so that we can accommodate TA requests.

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For technical assistance related to handheld devices, contact the TCEC Data Collection Help Desk at 530-754-8929 or TAnd@phs.ucdavis.edu