Editing a Live Survey

Need to make a change to your survey? If you have already collected data it is important to understand how surveys are updated as well as how respondents and your data will be affected.

In the past, after data had been collected for a survey, we prevented making certain edits or changes to prevent data loss or corruption however, users found this to be pretty frustrating so you can now make changes to your heart's content. That said, it is important to understand how these changes are made and how this affects your respondents and your data.

What can I safely edit after data collection?

- Tweak your **Survey Look & Feel** on the Style tab
- **Add a question, page, or answer option**
- **Make text changes**
- **Edit Answer Options** (See Editing Answer Options section below)
- **Add or edit actions** (Send Email, Results Chart, etc)
- **Adding or editing logic**

> Are you making changes to a survey that was sent via an **Email/SMS Campaign**?
>
> If a respondent has already accessed the survey and is using an edit link , save and continue link, or e-mail campaign link to re-enter the survey, they will not see any changes you may have made to the survey. If this is the case, contact support for additional assistance.

What edits are prevented?

If you have collected responses in the Conjoint question you will not be able to make the following edits:

- Choice Type
- Continuous Sum Max
- Adding or Removing Attributes or Levels.

What edits are not recommended?

> Editing custom tables that have collected data prior to January 21st 2016 is still not recommended however, if you are collecting data in a custom table after this date we've made things much safer. We still recommend using care when making edits to any questions, particularly those that have collected data.

- **Converting questions** - Converting to another question type can cause data loss or corruption if you convert to a question that is not compatible.
- **Editing or changing Dropdown Menu Grid questions** - This is a hard and fast no-no!
- **Deleting pages or questions** - Deleting elements in your survey will delete all the associated data. If you delete something by mistake simply go to Restore bin on your Build tab to bring something back!
- **Changing Reporting Values** - Changing Reporting Values for answer options can affect how your data is presented in your Responses, Reports and Exports. If you absolutely need to do this, it is recommended that you wait until all data collection is finished.
- **Changing your survey link** - Once you've shared your survey link you should not make changes. If you do, then the old link will not work. Instead, you can just create a new link and share that one.
- **Reordering pages with logic** - If you decide to do this, double check or redo your logic after the changes have been made. You may need to rebuild your logic.
- **Moving questions between pages** - This can cause trouble in individual responses to not show up properly if you move questions after data has been collected.
- **Changing Quotas** - Changing your quotas after already collecting data could

potentially result in going over quota. If you need to update a Sub-Quota, you can create a new version of the quota (with the new quota #) and then delete the old version.

- **Changing the text of the Text Highlighter question** - Editing your Text Highlighter text sample after collecting survey responses is highly discouraged as it will result in invalidating your data. If you need to make an edit to the **Text Content**, we recommended that you copy the question and make edits in the copy. You can then disable the original question.

Editing Answer Options

At times you may need to update the text of an answer option after your survey has already collected response data.

Perhaps you have noticed a typo that was not previously caught or your stakeholders have decided on different wording for a particular survey item.

In general, making text edits on your survey is completely fine. However if editing the text of answer options you will need to follow these steps for best results:

Edit the Question

We will first need to access the question that contains the answer option that you need to update.

Add Custom Reporting Values

If you are not already using Custom Reporting Values, you will need to add these using the **Advanced Options** tool.

Edit the Answer Option

By default, the Custom Reporting Values will mirror the Answer Options. We can then edit the Answer Option while leaving the Reporting Value intact with the original version of the text. This will ensure that the reporting aspect of your data is unaffected.

> If you ultimately need to update the reporting values as well for reporting/exporting purposes, we recommend doing so after the data collection period is finished.


Why can't I see my changes/updates?

While changes you make to your survey can be viewed right away in the application, the time it takes for live, external survey links to reflect changes will take a little

longer. This depends primarily on whether or not the link has been accessed before on that computer and browser. If so, it will take about 15-20 minutes for these changes to be disseminated to the live link.

We have a tool to get around this! Go to your **Tools** menu within your survey and select the option to **Clear Link Cache(s)**.
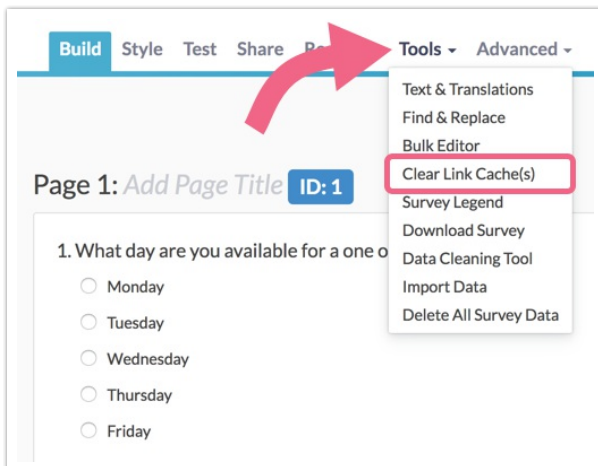
This will clear all of the links associated with your surveys so that any recent updates are reflected!
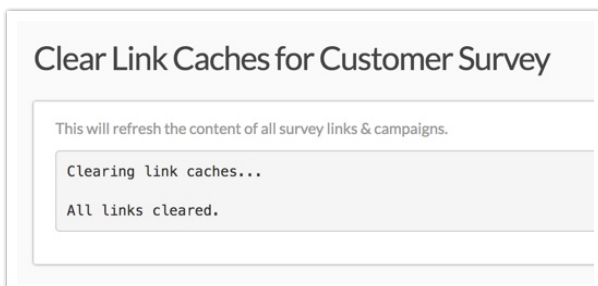
There are a couple of other options to get around this:

- Create a new share link on the Share tab.
- Clear your browser history and cache.
- Open the survey in a different browser.

Offline surveys:

Visit our Offline Documentation for instructions on updating offline surveys.

Embeds:

For embedded surveys we recommend going into your website where you embedded the survey and then *resaving* that page. This will force the embed to refresh and pull in any new changes.

Email Campaigns, Save & Continue and Edit Links:

If a respondent has already accessed the survey and is using an edit link , save and continue link, or e-mail campaign link to re-enter the survey, they will not see any changes you may have made to the survey. If this is the case, contact support for additional assistance.

Related Articles