

# Create a Diary Survey

Diary surveys are a common survey design. In diary surveys respondents take the survey at regular intervals – daily, weekly, monthly, etc. – to record behaviors like sleep, food consumption, purchases, etc.

Usually, survey researchers would like for this data to be in the same survey so that they can easily make data comparisons in the analysis phase. This requires returning respondents to the same response to provide additional data. We will accomplish this by sending a delayed [Send Email Action](#) which contains an [edit link](#). If you prefer to use another method, check out our tutorial on [Returning Respondents to a Later Page in a Survey](#) for other options.

## Step 1: Create Your Initial Survey Questions

For this tutorial example let's say we are collecting sleep diary data from our respondents for an entire week.

We will start by setting up the questions we wish to ask once, e.g. demographic questions, on the first page(s) of the survey. In one of these questions, we will collect the respondent's email address; we will need this later to return them to their response.

The screenshot shows a survey editor interface for 'Page 1: Contact Information' (ID: 1). The page contains three questions:

- 1. Please provide your name and email address:** This question has three input fields: 'First Name', 'Last Name', and 'Email Address'. The 'Email Address' field is highlighted with a red border. Each field has an 'Edit' icon to its left. To the right of the question is a vertical toolbar with 'Edit', 'Move', 'Copy', and 'Remove' options. A small 'ID: 3' label is visible at the bottom right of this question's area.
- 2. Are you currently employed?** This question has two radio button options: 'Yes' and 'No'. It has an 'Edit' icon to its left and a vertical toolbar with 'Edit', 'Move', 'Copy', and 'Remove' options to its right. A small 'ID: 19' label is visible at the bottom right of this question's area.
- 3. How well would you say you sleep on an average night?** This question has a horizontal slider input. It has an 'Edit' icon to its left and a vertical toolbar with 'Edit', 'Move', 'Copy', and 'Remove' options to its right. A small 'ID: 20' label is visible at the bottom right of this question's area.

At the top of the page, there is a 'Preview' button and several icons for adding, deleting, and refreshing the page. A checkbox labeled 'This question has answer validation' is checked, with a 'View Conditions' dropdown menu next to it.

## Step 2: Set Up Your Diary Interval Pages

On a new page we will begin setting up our diary questions. Typically, the questions are the same for each

interval of the diary so we'll just copy this page for Tuesday - Sunday.

Page 2: Monday ID: 3

4. What time did you go to bed last night?  
Please enter in the following 12-hour format: HH:MM am/pm

5. What time did you get out of bed this morning?  
Please enter in the following 12-hour format: HH:MM am/pm

This question has answer validation View Conditions

6. How easy or difficult would you say it was to *get to sleep*?

Very Difficult  Neither Difficult Nor Easy  Very Easy

This question has answer validation View Conditions

7. How easy or difficult would you say it was to *stay asleep*?

Very Difficult  Neither Difficult Nor Easy  Very Easy

### Step 3: Set Up Intermediate Thank You Pages

Now, we are going to add a page to follow each day's page that will work like a *Thank You Page* for that day's response. The set up for these pages is more or less identical, so, once you have one page created (including the send email action covered in Step 4) you will just be able to copy each.

Thank You Page: Monday Thank You ID: 4

Responses are marked as complete when they reach this page (The survey will end on this page)

This completes your response for Monday.

To make your thank-you page work as a typical thank-you page, you will need to set it up as a *Terminal Page*.

1. To do so, click the pencil icon to edit the page and go to the **Logic** tab.
2. Under **Terminal Page** select **Yes**.

**Edit Page**

Page **Logic** Layout Repeat

**Logic Rule**

[Remove All Logic](#)

--Select a condition-- is exactly equal to

[+ Add Condition](#)

**Terminal Page**

Yes

No

Now, when survey respondents reach this page, it will appear as if they are done with the survey for now.

## Step 4: Set Up Send Email Actions on Your Intermediate Thank-You Pages

Now we are ready to set up our method for returning respondents to the survey. For this example, we will be using a delayed Send Email Action that includes an edit link that will return the respondent to their response. We'll also add a special [URL Variable](#) that navigates them to the correct page.

1. To get started, we will [add a send email action](#) to our intermediate thank you page.
2. Customize the **Subject**, the **From Name**, **From Address**, and **Reply To** fields as needed.
3. In the **To** (recipient) field, using the **survey taker** link below the field, we will select the field in our survey where we collected an email address from the respondent.

**Edit Action**

Primary Setup **Logic** Advanced [Need Help?](#)

**Name**

New Send Email

**Subject** New Response Notification

**From Name** Quick fills: [Me](#) | [Survey Taker](#)

**From Address** noreply @surveygizmo.com (default)

**Reply To** No Reply <noreply@: .com>

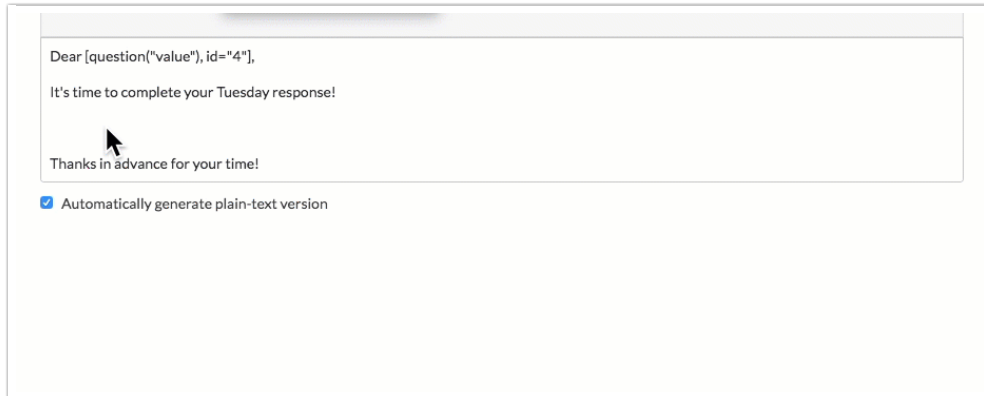
**To** Comma Separated Quick fills: [Me](#) | [Survey Taker](#) [Add BCC](#)

This is sample text (replace with your own).

**Email Uses**  
You can use email auto-responders to send your survey takers a thank you, a follow up, or a copy of the survey results to yourself. In order to email your customer make sure to ask for their email address somewhere in your survey. Use their email question merge code in the field

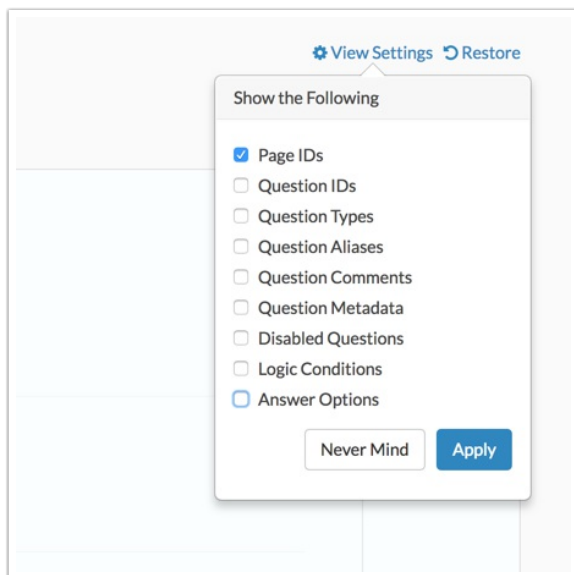
Automatically generate plain-text version

4. In the Message Body, we will add our text inviting the survey respondent to return to the survey. As part of the message body, we'll need to add the *edit link* merge code.
  - a. To do so, click the **Merge Code** button below the message body.
  - b. Click the **About the Respondent** section and select the **Insert** option associated with the **Edit Link**.

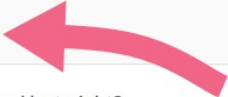


Once we have included our edit link, we will need to add a URL variable to the end of the edit link that will navigate the respondent to the proper page. Before we can do so, we need to get the ID or SKU for the pages you wish the survey respondent to land when returning to the survey.

1. To obtain page IDs click the **View Settings** link in the upper-right corner of the **Build** tab. Select **Page IDs** and click **Apply**.



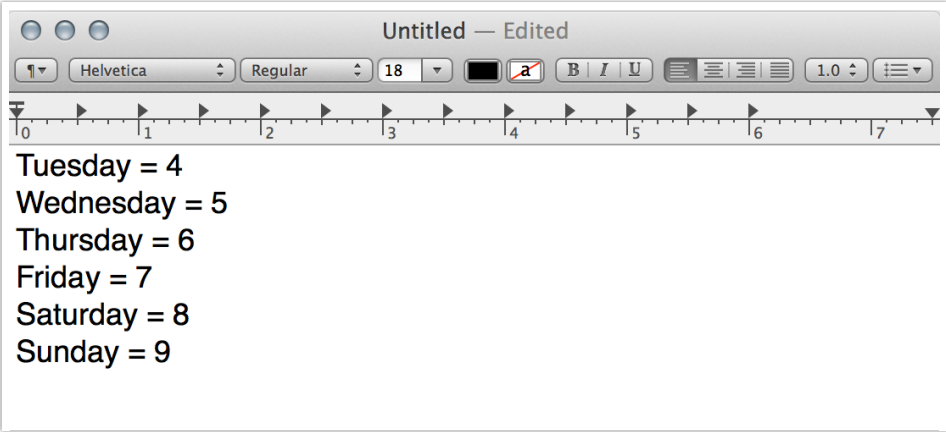
2. Your page IDs will then display to the right of your page title on the **Build** tab.

Page 2: Monday **ID: 3** 

3. What time did you go to bed last night?  
Please enter in the following 12-hour format: HH:MM am/pm

4. What time did you get out of bed this morning?  
Please enter in the following 12-hour format: HH:MM am/pm

3. We recommend making a quick list like the below list to reference while building out the edit links in each of your send email actions.



Untitled — Edited

Helvetica Regular 18

Tuesday = 4  
Wednesday = 5  
Thursday = 6  
Friday = 7  
Saturday = 8  
Sunday = 9

4. With our page ID handy, we'll add the `__sgtarget` URL variable to the end of our edit link merge code(which we added to the body of our email message) starting with an ampersand, 2 underscores, and sgtarget=ID. The result will look like this:

```
[survey("edit link")]&__sgtarget=4
```

5. Finally, we need to delay the send email action for the amount of time we wish to elapse before inviting the survey respondent to return to the survey.
- a. To do so, go to the **Advanced** tab of the send email action and in the **Time delay** field enter the time delay you wish to use. This could be **+30 days**, **+2 months**, etc.

Time delay

+24 hours

**b. Click [Save Action!](#)**

Once you've set up your first intermediate thank you page and send email action you can now copy the page and make the appropriate edits (page ID and message body text) and then reorder the new page to the appropriate location!

## Send Diary Reminder on a Specific Date/Time

Note that in order to use this option, you will need to have your respondents' email addresses ahead of time.

Using our daily survey example above, remember that we set a 24 hour delay on our send email actions.

- This means that if a respondent takes the survey at 5 pm on Monday, the email containing Tuesday's invite will arrive around 5 pm on Tuesday.
- If the respondent then takes the survey at 10 pm on Tuesday, Wednesday's invite will not arrive until 10 pm on Wednesday, and so on.

What if you want the invite for each iteration of your diary survey to arrive at the exact same time each day, week, etc.?

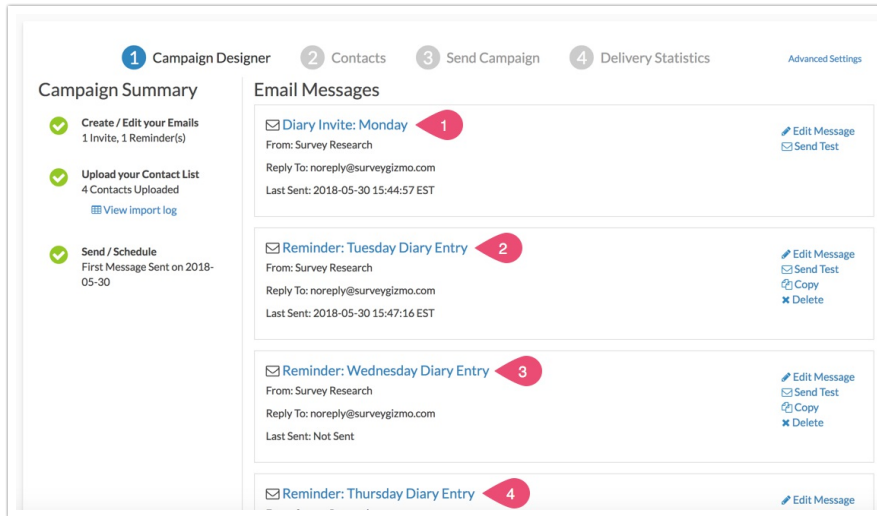
To do this, you can utilize SurveyGizmo's [Email Campaign](#) feature. An email campaign allows you to send an invitation link to a list of email addresses. You can then send a scheduled reminder (for a specific date/time) for each iteration of your diary.

*The good news is that you do not have to change the structure of your diary survey. If you want to use an email campaign, you should still follow Steps 1-3\* above.*

### Create Your Email Campaign

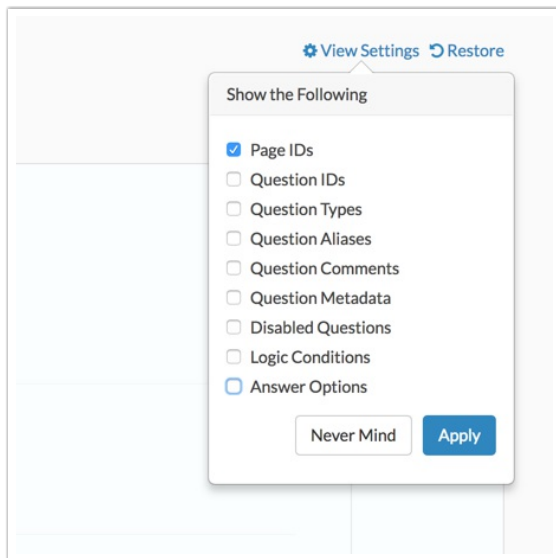
- 1.** The first step to distributing your diary survey is to [create an email campaign](#). You will need to customize your invitation email message and add the contact(s) that will be invited to participate in your diary survey.
- 2.** Next, you will need to [add a separate Reminder Message](#) for each iteration of the diary (minus the first day). Using our above example, respondents are asked to submit a response each day of the week (7 days).
  - a.** The initial invite will go out on Monday.

- b. We need a reminder message to be sent for each of the following days (Tue-Sun). As such, we will need six reminder messages. Our campaign designer page should look something like this:

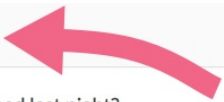


3. Each of the reminder messages will require a URL variable to be added to the end of the survey link that will navigate the respondent to the proper page when they return to their survey. Before we can do so, we need to get the ID or SKU for the pages you wish the survey respondent to land when returning to the survey.

- a. To obtain page IDs click the **View Settings** link in the upper-right corner of the **Build** tab. Select **Page IDs** and click **Apply**.



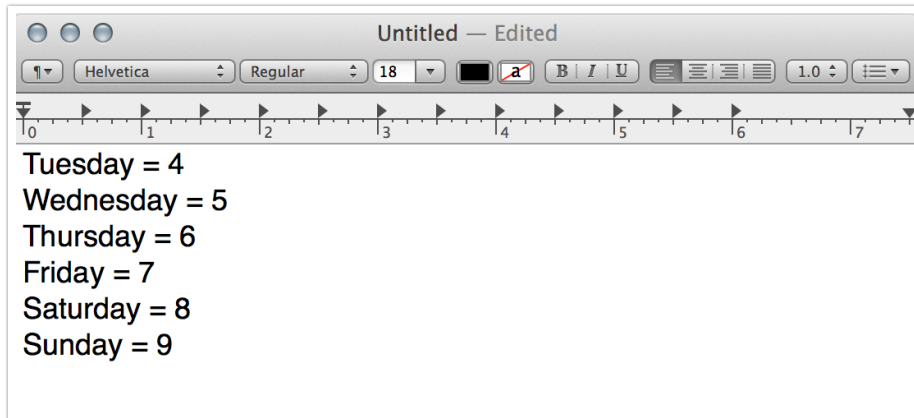
- b. Your page IDs will then display to the right of your page title on the **Build** tab.

Page 2: Monday **ID: 3** 

3. What time did you go to bed last night?  
Please enter in the following 12-hour format: HH:MM am/pm

4. What time did you get out of bed this morning?  
Please enter in the following 12-hour format: HH:MM am/pm

- c. We recommend making a quick list of the Page IDs (like the below list) to reference while building out the links in each of your reminder messages.



4. With our page IDs handy, we will edit the first of our reminder messages.

1 Campaign Designer 2 Contacts 3 Send Campaign 4 Delivery Statistics [Advanced Settings](#)

**Campaign Summary**

- ✓ Create / Edit your Emails  
1 Invite, 1 Reminder(s)
- ✓ Upload your Contact List  
4 Contacts Uploaded  
[View import log](#)
- ✓ Send / Schedule  
First Message Sent on 2018-05-30

**Email Messages**

✉ **Diary Invite: Monday** [Edit Message](#)  
From: Survey Research [Send Test](#)  
Reply To: noreply@...com  
Last Sent: 2018-05-30 15:44:57 EST

✉ **Reminder: Tuesday Diary Entry** [Edit Message](#)  
From: Survey Research [Send Test](#)  
Reply To: noreply@...com [Copy](#)  
Last Sent: 2018-05-30 15:47:16 EST [Delete](#)

5. Next, we need to access the HTML source code for the reminder message. We click the **Source** button to do so.





### Schedule

When should this email message be sent?

Specific date

Date

Time

All Times in Eastern Standard Time (UTC-5)

Relative date

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**9. Important!** Before you send out your initial invite, there is a final step. It's important to note that reminder messages can only be sent to respondents that have either *Not Started*, or have a response status of *Partial*. In [Step 3](#) above, we configured intermediate Thank You pages that are shown after each diary entry. By default, these intermediate Thank You pages set a respondent's status to *Complete*, thus making them ineligible to receive reminder messages. We need to override this behavior.

- Edit the first intermediate Thank You page and scroll down to the **Override response status when this page is reached** section.
- Select the **Change response status to "Partial"** option and **Save Page**.

### Edit Page

Page Logic Layout Repeat

Page Title

Page Description

Disable Page

Yes

No

Override response status when this page is reached

Default: don't override

Change response status to "Partial"

Change response status to "Complete"

Change response status to "Disqualified"

- Repeat this process for each of your intermediate Thank You pages.

**10.** Now you are ready to send your Email Campaign initial invite and start collecting diary entries.

Related Articles