## Creating and Publishing an IQ Survey

Market: Federal/State/Local, House, Senate

**Description:** These instructions teach users how to create a new survey in IQ5. Note that the new survey will be created using the default survey template selected in IQ4. Talk to your IQ Consultant for more information on editing the Survey template your surveys will be created from.

- **1.** Navigate to **Outreach**  $\rightarrow$  **Surveys**  $\rightarrow$  **All Surveys**  $\rightarrow$  **+New**: **Survey**.
  - a. \*Note: You may need to click the 🖾 symbol to see your new survey for editing.



2. Click Edit on your new survey.

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≡	Ð	All Survey	s 🛩 Find			Filter Result							() ()
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	ŦΑ	Il Survey	s (Total 7	70) 🗘						By Date Created (Desc) V	+		🖄 🗙
		Name			Status	Owner	Created	Modified	Embed		Draft		
		Survey	100178		Draft		10/3/2024	10/3/2024	Link		Survey 100 Created 10/3/2024 Modified 10/3/202	178	
*	//2	Survey_	100176		Draft	ing the second	9/13/2024	9/13/2024	Embedded		Owner	Intelligent Tagent	
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	#5	Survey	100171		Draft		9/6/2024	9/6/2024	Embedded			Congressman X00000	
28	#6	Survey	100170		Draft	seattan Higen	9/6/2024	9/6/2024	Embedded				
ø	#7	Survey	100169		Draft	In section Trapert	9/6/2024	9/6/2024	Embedded				
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	#9	Survey	100167		Draft	In section without	9/4/2024	9/6/2024	Embedded				
	//////////////////////////////////////	Survey	100166		Draft	To beauty	8/9/2024	8/9/2024	Embedded		Edit Publish	View instapoll	0

**3.** The editing window for the Survey now displays. Edit the **Name, Owner, and Description** fields on the left hand side.

- 4. Select the Embed Format that is best for the delivery of the Survey, along with the Link Text Style color, size and text. Optionally, choose an Affiliation Code to add/remove to Constituents who take the Survey.
- **5.** Begin adding questions to your survey. There are several Formats to select once you click the **+** icon:

No fields are defined. Click below to add one.				
	$\oplus$			

a. Text Block: Used to place instructional text or titles of different areas in the Survey.

Add Field		×
Label Fall 2024 Survey		I
Appearance Answer Type Text block	~	
		Save Cancel

b. **Checkboxes**: allow multiple responses or options to be selected. Lower and Upper Limit options are available with Checkbox questions. Upper and lower limits allow you to select options that range from the three most important (i.e. 1-3 answers are allowed). If a question is marked as required and lower/upper limits are not populated, at least one response is required.

Edit Field		×		
Label Checkbox Test Questio	n			
ੈ ∎ Blue	Blue	⊕Add affiliation		
m ↓ Red	Red	⊕ Add affiliation		
Green	Green	⊕ Add affiliation		
Add Another Ans	wer			
Required	Upper Limit       Required       2			
Add "Other" An	iswer			
Appearance Answer Type Checkboxes (multi	value) × 1 × Horizontal ×	Arrangement Question over answer 🗸		
Delete 🛅		Save Cancel		

c. Radio Buttons: allow a single response from a set of fields.

Add Field         Label         Radio Button Test Question            ①         ①         ①		
1	1	⊕ Add affiliati
t <sup>2</sup>	2	⊕ Add affiliati
	3	⊕ Add affiliat
⊕ Add Another	Answer	
Required		
Add "Other	" Answer	
Answer Type Radio buttons	Columns Direction (single value) ~ 1 ~ Horizontal ~	Arrangement Question over answer 🗸

d. Dropdowns: allow a single response from a set of values displayed in a list box.

Add Fleid		
<sup>Label</sup> Dropdown Test Q	uestion	
Placeholder Text		
Add Field   Lobel   Dropdown Test Question   Placeholder Text   Placeholder Text   Placeholder Text   Image: Constraint of the state of		
1	Answer 1	⊕ Add affiliatio
	Answer 2	⊕Add affiliatio
t 3	Answer 3	⊕Add affiliatio
⊕ Add Another	Answer	
<ul> <li>Required</li> <li>Appearance</li> <li>Answer Type</li> </ul>	Arrangement	
Dropdown (sin	gle value) 🗸 Question over answer 🗸	
		Save Cancel

e. Text Box: allows response to be typed in a text box.

Add Field	×
Label Text Box Test Question: Type out your answer below	
Placeholder Text	
Placeholder Text	
Required	
Appearance	
Answer TypeRowsArrangementText box (freeform value)2Question over answer	
Save	Cancel
	1

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6. Enter the Question and each Answer to include in the survey. If you select an Affiliation Code(s) to associate with one or more answer, that Affiliation Code(s) will be applied/removed to/from the Contact Record when the survey is submitted.

Edit Field				>
Label				
Radio Button Test Que	stion			
	1			
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		+		⊕ Add affiliation
m ↓ 2	2	-		⊕ Add affiliation

- 7. Select the **Required** checkbox to indicate a response is required.
- 8. Select Add an "Other" Answer option to add an optional field to further clarify a response.

± 3 3			$\oplus$ Add affiliation
• Add Another Answer	Answer		
🗹 Required			
✓ Add "Other" Answer	Placeholder Other		

## Example Survey:

Fall 2024 Survey			
Charlebox Tast Quartian			
Blue     Bod			
Green			
Radio Button Test Ouestion			
○ 1			
02			
○ ○ 3			
Other			
Dropdown Test Question			
			~
Text Box Test Question: Type out	your answer below		
			li

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- 9. At the top right of the page, click Save.
- **10.** Click **Publish**, then select whether to publish as a **standalone web form** that can be sent to constituents or to **start an outreach mailing based on the content of this survey.**