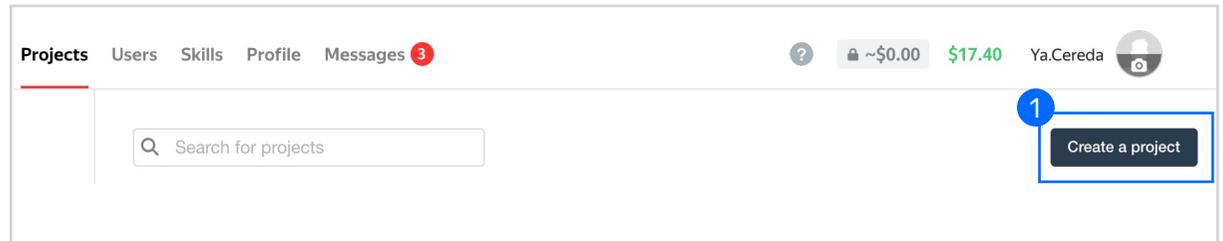




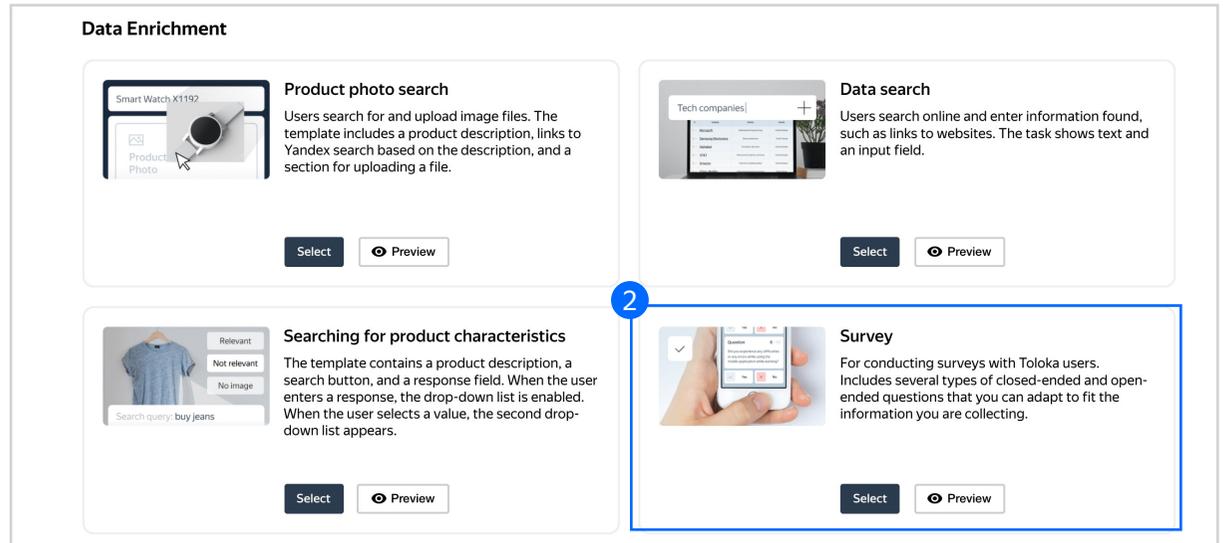
Survey manual

Create a project

1. Click **Create a project**.

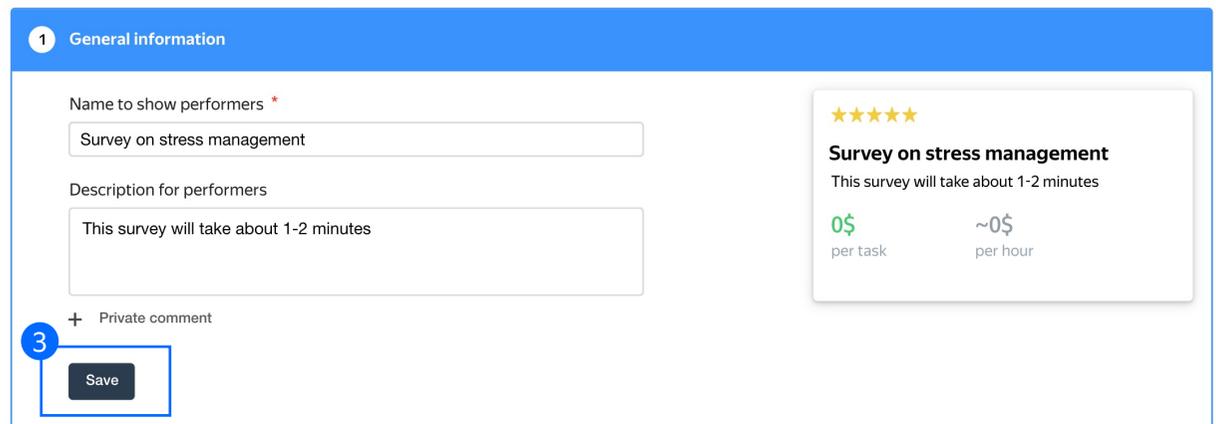


2. Choose the **Survey** template.



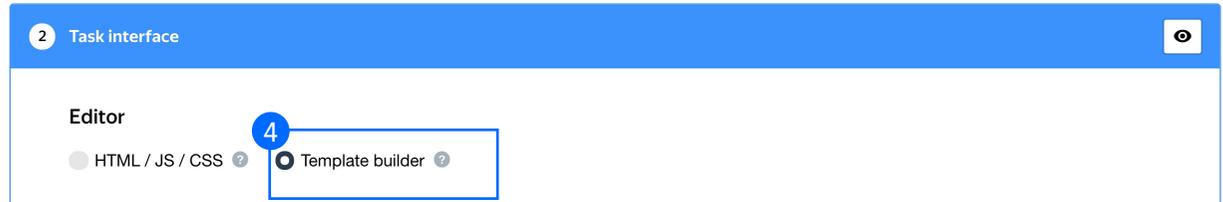
3. Enter a clear project name and description. Click **Save**.

Note: The project name and description will be visible to the performers.

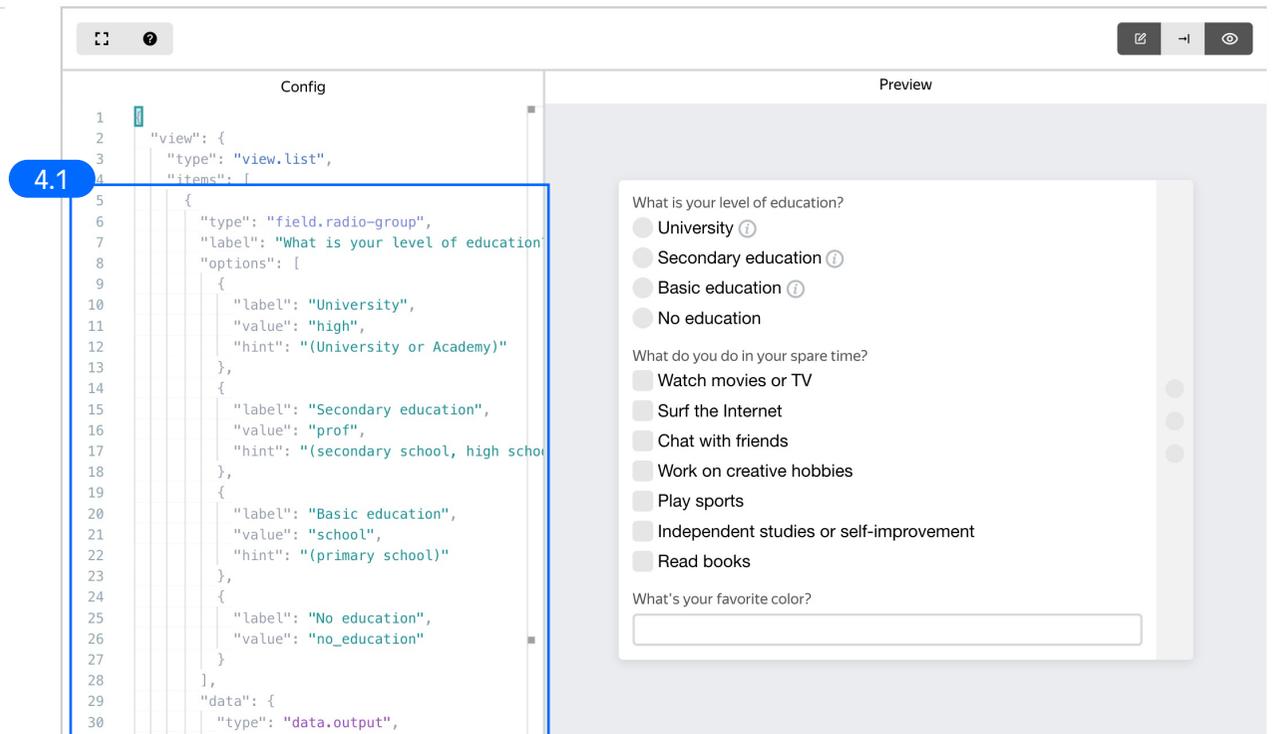


4. Update the task interface in the **Template builder** block.

Read more about the [Template builder](#) in the Requester's Guide.



- 4.1. Find the part of the config where the questions and the possible answers start (starting from line 5).



4.2. Replace the default question and answers with the ones you need. Add more questions if you like. Make sure to replace not only the questions, but also the **“data / path”** field: this is the key to which all answers to the question will belong.

You can find the full config in the Appendix at the end of this manual.

Check the [Interfaces section](#) of our Knowledge Base for tips on interface design.

The screenshot shows a configuration editor with two panels: 'Config' and 'Preview'. The 'Config' panel displays a JSON configuration for a survey. A blue box highlights the configuration for the first question, which is a radio group. The 'Preview' panel shows the rendered survey interface with three questions and their respective options. The first question is 'Where do you work' with options 'Office' and 'Home office'. The second question is 'Is there a lot of stress in your everyday life?' with options 'A lot' and 'Not much'. The third question is 'How do you cope with stress? You can select several options' with multiple options including 'Spending time with family', 'Sleeping', 'Going out to restaurants, cinemas etc', 'Sport', 'Meditation', 'Therapy', 'Alcohol', 'Other', and 'None of the above'. Below the questions are 'Submit' and 'Reset' buttons.

```

1  "sw": {
2  "type": "view.list",
3  "items": [
4  {
5  "type": "field.radio-group",
6  "label": "Where do you work",
7  "options": [
8  {
9  "label": "Office",
10 "value": "office"
11 },
12 {
13 "label": "Home office",
14 "value": "home"
15 }
16 ],
17 },
18 "data": {
19 "type": "data.output",
20 "path": "workmode"
21 },
22 "validation": {
23 "type": "condition.required",
24 "hint": "Select an option"
25 }
26 },
27 {
28 "type": "field.radio-group",
29 "label": "Is there a lot of stress in your everyday life?",
30 "options": [
31 {
32 "label": "A lot",
33 "value": "alot"
34 },

```

4.3. Add an attention check question (or several). Since there are no correct answers to a survey and we can't just check if they are right or wrong, we need to use some workaround techniques to ensure quality.

Learn more about this in the **Create a pool** section.

The screenshot shows a configuration editor with two panels: 'Config' and 'Preview'. The 'Config' panel displays a JSON configuration for an attention check question. A blue box highlights the configuration for the attention check question, which is a radio group. The 'Preview' panel shows the rendered survey interface with two questions and their respective options. The first question is 'Are you now completing a survey on Toloka?' with options 'Yes' and 'No'. The second question is 'Do you buy mobile apps?' with options 'Yes', 'No, I don't need them', and 'No, I'm not ready to pay'. Below the questions are 'Submit' and 'Reset' buttons.

```

129 "type": "field.radio-group",
130 "label": "Are you now completing a survey on Toloka?",
131 "options": [
132 {
133 "label": "Yes",
134 "value": "yes"
135 },
136 {
137 "label": "No",
138 "value": "no"
139 },
140 ],
141 "validation": {
142 "type": "condition.required",
143 "hint": "Select an option"
144 }
145 },

```

4.4. Make sure the specifications include all output data paths that you have created.

Note: Specifications are a description of input data that will be used in a project and the output data that will be collected from the performers.

Read more [about input and output data specifications](#) in the Requester's Guide.

The screenshot displays the 'Data specification' interface, which is divided into two main sections: 'Input data' and 'Output data'. The 'Input data' section contains one field labeled 'theme (string)'. The 'Output data' section contains five fields: 'workmode (string)', 'stress (string)', 'coping (json)', 'meditation (string)', and 'honeypot (string)', followed by 'apps (string)'. Each field has a small circular icon to its right. Below each section is an 'Add field' button. At the bottom of the interface, there is a 'Show common interface elements' button and a 'Save' button. A blue callout bubble with the number '4.4' is positioned over the 'Save' button.

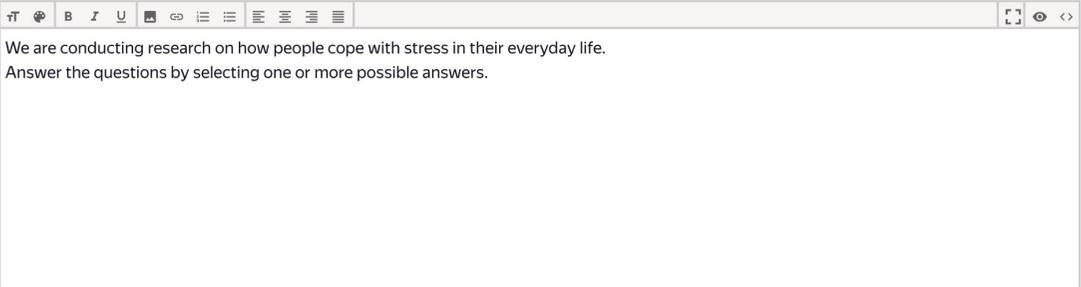
5. If there is anything important about the survey that the performers should know, put it in the instructions. In that case, the attention check question can be based on this information.

Click **Save**.

Get more tips on designing [instructions](#) in our Knowledge Base.

3 Instructions for performers

When a performer selects a task, they first see the instructions that you wrote. Describe what needs to be done and give examples. You can prepare your instructions in HTML format, then copy and paste them into the editor. Press < > to switch to HTML mode. To learn more, see the [documentation](#).



5 Save

6. Fill in **Name and description** and **Instructions** in the **Translations** block for each language that you want performers to see. If you leave these fields empty, the language is inactive. Click **Save**.

4 Translations

i Performers from different countries will understand the purpose of the task better if it's in their own language. Translate the task name, description, and instructions into each language that you want performers to see. Otherwise, the language is inactive. If you want to translate the task interface, you have to create it using Template Builder.

Source language:

Translations

Language	Name and description for performers	Instructions for performers	Task interface
✓ Source	✓	✓	✓

Add translation

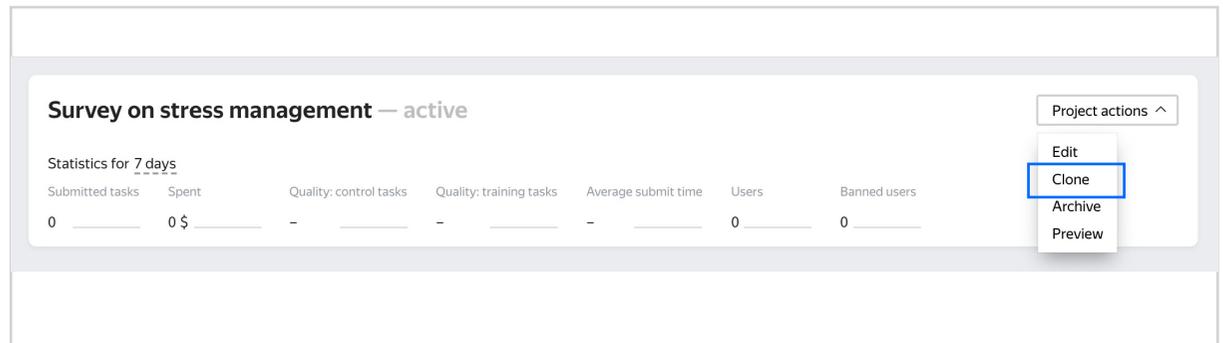
6 Save

7. Click **Finish** to save the project.



The screenshot shows a 'New project' form with four sections, each marked with a green checkmark: 'General information', 'Task interface', 'Instructions for performers', and 'Translations'. In the top right corner, there is a 'Back to the old interface' link, a 'Cancel' button, and a 'Finish' button. A blue circle with the number '7' is positioned above the 'Finish' button, and a blue rectangle highlights the 'Finish' button itself.

Note: To edit project parameters, click the button in the list of projects or go to **Project actions** → **Edit** on the project page.



The screenshot shows a project page for 'Survey on stress management' which is active. It displays statistics for the last 7 days. A 'Project actions' dropdown menu is open, and the 'Clone' option is highlighted with a blue rectangle.

Statistics for 7 days						
Submitted tasks	Spent	Quality: control tasks	Quality: training tasks	Average submit time	Users	Banned users
0	0 \$	-	-	-	0	0

Create a pool

1. Click **Add a pool**.

A pool is a set of paid tasks grouped into task pages. These tasks are sent out for completion at the same time.

Note: All tasks within a pool have the same settings (price, quality control, etc.)

The screenshot shows the 'Survey on stress management' project page, which is currently active. At the top right, there is a 'Project actions' dropdown menu. Below the title, a 'Statistics for 7 days' section displays various metrics: Submitted tasks (0), Spent (0 \$), Quality: control tasks (-), Quality: training tasks (-), Average submit time (-), Users (0), and Banned users (0). The main navigation bar includes 'Pools', 'Training', 'Statistics', and 'Quality control', with 'Pools' being the active tab. Under the 'Pools' tab, there are buttons for 'Active and closed', 'Archived', and 'Filters', along with a search input field. A blue circle with the number '1' highlights the 'Add a pool' button. Below the navigation, a message states: 'Pools can be archived manually or automatically (automatic archiving applies to pools with no activity for 30 days)'. A table header is visible with columns: Title, Priority, Progress, Status, Started, and To be completed. A note below the header reads: 'To launch a project, you first need to add a pool, set user filters and quality control rules, and upload tasks.' At the bottom right, there is a dropdown menu showing '50'.

2. Give the pool any name you find suitable. You are the only one who will see it.

The description can be either public or private. Choose the option you prefer.

2

POOL NAME (VISIBLE ONLY TO YOU) ? Survey on stress management

Use project description

PUBLIC DESCRIPTION ? This survey will take 1-2 minutes

Add a private description

3. Specify [pool parameters](#):

- 3.1. Select pool type. Choose **Other**.

Read more about [pool types](#) in the Requester's Guide.

POOL TYPE ? Other

—
Exam
Training
Retry
✓ Other

PRICE IN US DOLLARS ? FEE ?

- 3.2. Set the price per task suite (for example, \$0.01). Surveys are quick and don't require any extra training, so the price can be basic.

Read more about [pricing principles](#) in our Knowledge Base.

Price per task suite

Each task suite can have one or multiple tasks on the same page. Enter the total price for all tasks in the suite.

3.2

PRICE IN US DOLLARS ? 0.01

FEE ? 0.005

+ Dynamic pricing

3.3. [Filter](#) performers who can access the task. Choose “**No**” in the **Adult content** block. Click **Add filter** to choose the **Languages** option in the list.

3.3

Performers

[Copy settings from...](#)

Filter performers who can access the task.
Toloka has users from different countries, so don't forget to filter by language and region. [Learn more](#)

ADULT CONTENT No

Add filter

3.4. Select English-speaking performers using the **Languages = English** filter.

3.4

PERFORMER PROFILE

Languages English

Performers who passed the language test

3.5. Add access from both the **Toloka web version** and **Toloka for mobile**. Most surveys are suitable for completion on a mobile device, and it will speed up pool completion.

3.5

CALCULATED DATA

Client = Toloka web version

OR = Toloka for mobile

Trash icons and a plus sign are visible on the right side of the filter row.

3.6. Add other filters that you consider necessary. For example, we would like to run our survey on people living in the UK and the USA who are over 30.

Note: Personal information like dates of birth is provided by Tolokers themselves. The platform does not control the accuracy of this info. The region can be double-checked using the **Region by IP** parameter.

3.6

CALCULATED DATA

Region by IP = United States

OR = United Kingdom

AND

PERFORMER PROFILE

Date of birth ≥ 1991-01-06

Trash icons and a plus sign are visible on the right side of the filter rows.

3.7. Set up [Quality control](#). We will use non-automatic acceptance. The reason for accepting the task will be a correct answer to the attention check question.

Select **Non-automatic acceptance = Yes**.

Quality control

Add rules to get more accurate responses.
All rules work independently.

3.7

NON-AUTOMATIC ACCEPTANCE ? Yes

REVIEW PERIOD IN DAYS 14

CAPTCHA FREQUENCY ? None

3.8. Then, choose **Control tasks**. If the number of responses is at least 1 and the correctness of the responses = 100%, then the answer will be auto-accepted.

Read more about [configuring this rule](#) in our Requester's Guide.

CONTROL TASKS ?

Recent control task responses to use 1

3.8

If correct control responses ... = 100 +

then accept all assignments fro...

3.9. Create the “Stress management” skill that will reflect response quality. It can later be used if you re-run the survey and need to exclude those who have already taken part in it.

Click **Add skill**.

Performers [Copy settings from...](#)

Filter performers who can access the task. Toloka has users from different countries, so don't forget to filter by language and region. [Learn more](#)

ADULT CONTENT No

Add filter Add skill

3.10. Enter the skill name and add a description if needed. You are the only one who will see it.

Leave the skill private, as default, and click **Add**.

Add skill

TITLE

stress-management

DESCRIPTION

Public? No

Cancel Add

3.11. In **Control tasks**, add a rule to assign the skill to performers.

Recent control task responses to use 1

3.11

If number of control respon... \geq 1

then assign skill from the field stress-manage

correct responses (%)

This screenshot shows a rule configuration interface. At the top, there is a header 'Recent control task responses to use' with a trash icon on the right and a text input field containing the number '1'. Below this, a blue-bordered box highlights a rule configuration. The rule starts with 'If' followed by a dropdown menu showing 'number of control respon...', a comparison operator '≥', and a text input field with '1'. The 'then' clause consists of a dropdown menu showing 'assign skill from the field' and a text input field with 'stress-manage'. Below the 'then' clause, there is another dropdown menu showing 'correct responses (%)'. A plus sign is visible at the bottom right of the rule configuration area.

3.12. Add the **Processing rejected and accepted assignments** rule. If an assignment has been rejected, the task will be sent to another performer.

PROCESSING REJECTED AND ACCEPTED ASSIGNMENTS ?

3.12

If assignment becomes rejected

then extend overlap by 1

Open pool if closed

This screenshot shows a rule configuration interface. At the top, there is a header 'PROCESSING REJECTED AND ACCEPTED ASSIGNMENTS' with a question mark icon on the right. Below this, a blue-bordered box highlights a rule configuration. The rule starts with 'If' followed by a dropdown menu showing 'assignment becomes', another dropdown menu showing 'rejected', and a plus sign. The 'then' clause consists of a dropdown menu showing 'extend overlap by' and a text input field with '1'. Below the 'then' clause, there is a checked checkbox followed by the text 'Open pool if closed'. A plus sign is visible at the bottom right of the rule configuration area.

3.13. Overlap. This is the number of users who will complete this survey. For example, 50.

To understand [how this rule works](#), go to the Requester's Guide.

Overlap

Specify how many performers you want to complete each task in the pool.

3.13

OVERLAP ? 50

DYNAMIC OVERLAP ? Off

3.14. Optionally, specify the percentage of top-rated performers in the [Speed / quality balance](#).

Note: This can slow down pool completion.

Speed/quality balance

Set additional filters to restrict performer access based on their rating in Toloka. This boosts quality but may slow down project completion because there will be fewer performers available to complete tasks. [Learn more...](#)

Top % Online Time

Specify the percentage of top-rated active users who can access tasks in the pool.

3.14

Speed All 90% 80% 70% 60% 50% 40% 30% 20% 10% Quality

60% top-rated performers were selected.
Tasks are not available for active users.

3.15. Time given to complete a task suite (for example, 600 seconds).

To understand how much time it should take to complete a task suite, try doing it yourself.

Parameters

3.15

TIME PER TASK SUITE IN SECONDS ? 600

POOL CLOSING DATE ? 2022-08-26

KEEP TASK ORDER ? No

WAITING TIME FOR THE POOL TO CLOSE IN SECONDS ? 0

POOL PRIORITY WITHIN THE PROJECT ? 0

4. Click **Save** to save Pool parameters.

Parameters

TIME PER TASK SUITE IN SECONDS ?

POOL CLOSING DATE ?

KEEP TASK ORDER ? No

WAITING TIME FOR THE POOL TO CLOSE IN SECONDS ?

POOL PRIORITY WITHIN THE PROJECT ?

Cancel **Save**

Prepare and upload a file with tasks

1. Prepare a TSV file with tasks as shown in our [example](#). Don't forget to include a control task based on your attention check question.
2. [Upload pool tasks](#) from this file.

Survey on stress management — closed

Statistics Download results Edit

Download the sample file, add your task data, and upload the file to the pool. The sample file uses TSV format, which is the same as CSV but using tab as the separator. Make sure you choose UTF-8 encoding when saving the file. [Learn more in the guide.](#)

- Template for general tasks.tsv
- Template for control tasks.tsv
- Template for training tasks.tsv

2 Upload

0 task pages	0 training tasks
0 tasks	0 control tasks

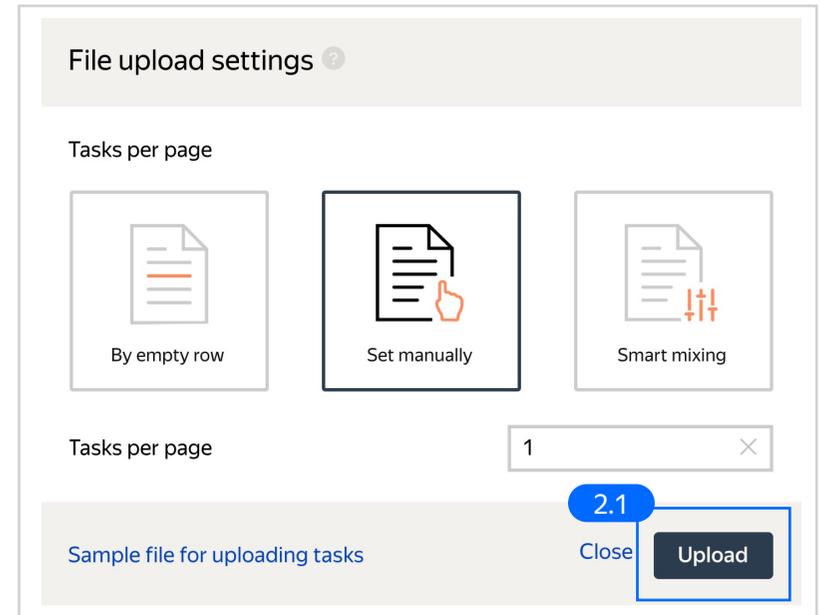
0 % Completed 0

2.1. Select **Set manually** and choose 1 task per page.

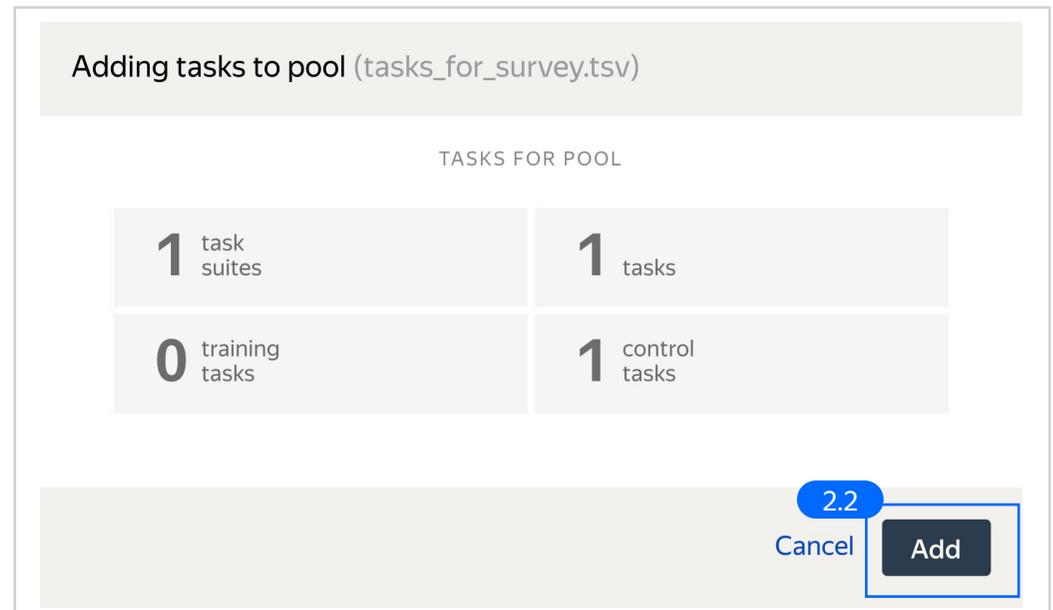
To learn more about [grouping tasks](#) into suites, read the Requester's Guide.

Click **Upload** again.

Note: If you changed the name of the input field, change it in the file as well.



2.2. In the pop-up window, click **Add** to add tasks to the pool.



3. Preview the pool.

 **Survey on stress management — closed** Statistics Download results Edit

Download the sample file, add your task data, and upload the file to the pool.
The sample file uses TSV format, which is the same as CSV but using tab as the separator.
Make sure you choose UTF-8 encoding when saving the file. [Learn more in the guide.](#)

[Template for general tasks.tsv](#)
[Template for control tasks.tsv](#)
[Template for training tasks.tsv](#)

Upload Files Delete **3** Preview

1 task pages	0 training tasks
0 tasks	1 control task

0 %
Completed 0

0 50

Tasks Active Messages 9:41 / \$0.01 \$0.00 / \$0.00 Instructions

Survey on stress management

Where do you work

Office

Home office

Is there a lot of stress in your everyday life?

A lot

Not much

How do you cope with stress? You can select several options

Spending time with family

Sleeping

Going out to restaurants, cinemas etc

Sport

Meditation

Therapy

Alcohol

Other

None of the above

How do you feel about meditation?

I practice meditation

I used to practice meditation

I have never practiced but I'd like to try

I have never practiced and I don't want to try

Are you now completing a survey on Toloka?

Yes

No

Do you buy mobile apps?

Yes

No, I don't need them

No, I'm not ready to pay

1 / 1

4. Start the pool.

Note: Remember that the tasks will be completed by actual Tolokers. Double check that everything is correct with your project configuration before you start the pool.

4

Survey on stress management — closed

Statistics Download results Edit

Download the sample file, add your task data, and upload the file to the pool.
The sample file uses TSV format, which is the same as CSV but using tab as the separator.
Make sure you choose UTF-8 encoding when saving the file. [Learn more in the guide.](#)

- Template for general tasks.tsv
- Template for control tasks.tsv
- Template for training tasks.tsv

Upload Files Delete Preview

1 task pages	0 training tasks
0 tasks	1 control task

0 % Completed 0

0 50

Receiving responses

1. Wait until the pool is completed. Refresh the pool page to check progress.

You will see that there are accepted assignments, and assignments that need to be reviewed. They were not accepted because a user failed the attention check. They need to be rejected (there is no automatic rejection).

Click **Review assignments**.

2. Select all the assignments in the **Submitted** list and click **Reject**.

Survey on stress management — closed

Download the sample file, add your task data, and upload the file to the pool. The sample file uses TSV format, which is the same as CSV but using tab as the separator. Make sure you choose UTF-8 encoding when saving the file. [Learn more in the guide.](#)

[Template for general tasks.tsv](#)
[Template for control tasks.tsv](#)
[Template for training tasks.tsv](#)

100 %
Completed 50, accepted 49
Review assignments 1

1 task pages	0 training tasks
0 tasks	1 control task

Submitted responses

Download results Upload review results

50 Total 1 Submitted 49 Accepted 0 Rejected

Accept Reject Actions Submitted Accepted Rejected All assignments

Response	Performer	Completed	Duration	Status
0001a091f9--6128c7bcc1b550132cd159bd	c15744f67e3dfa14aa014c8e0b728a12	08/27/2021 2:09:39 PM	55 sec	—

10

3. Write a comment for the performers explaining why the task was rejected and click **Done**.

Specify the reason for rejection

There was an attention check question that was failed

Cancel Done

4. Go back to the pool and wait for extra assignments to be completed.

Note: These were generated because of a setting we applied in **Section 3.8** of the **Create Pool** section.

4 Survey on stress management — open

Statistics Download results Edit

Download the sample file, add your task data, and upload the file to the pool. The sample file uses TSV format, which is the same as CSV but using tab as the separator. Make sure you choose UTF-8 encoding when saving the file. [Learn more in the guide.](#)

- Template for general tasks.tsv
- Template for control tasks.tsv
- Template for training tasks.tsv

Upload Files Preview	
1 task pages	0 training tasks
0 tasks	1 control task

98 %
Completed 50, accepted 49

Review assignments 0

0 51

- Once the extra assignments have also been completed, click **Download results** to get the file with the answers.

Survey on stress management — closed

Download the sample file, add your task data, and upload the file to the pool. The sample file uses TSV format, which is the same as CSV but using tab as the separator. Make sure you choose UTF-8 encoding when saving the file. [Learn more in the guide.](#)

- [Template for general tasks.tsv](#)
- [Template for control tasks.tsv](#)
- [Template for training tasks.tsv](#)

1 task pages	0 training tasks
0 tasks	1 control task

100 %
Completed 51, accepted 50

Review assignments 0

- Choose only **Accepted answers** to view those that passed all the required checks.

Download results

Status

- Active
- Submitted
- Accepted
- Rejected
- Skipped
- Expired

Columns

- URL
- Task suite ID
- start time
- reject time
- price
- task ID
- Performer ID
- submit time
- skip time
- assignment ID
- status
- accept time
- expire time

Download data for the period

Separate assignments with empty row

Exclude assignments by banned users

Close Download results

