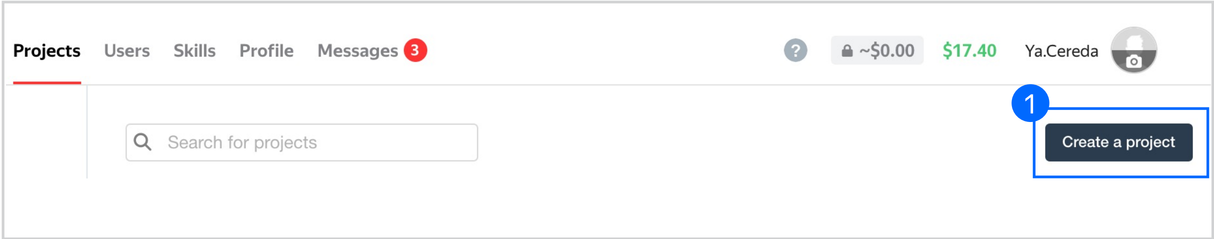
Toloka

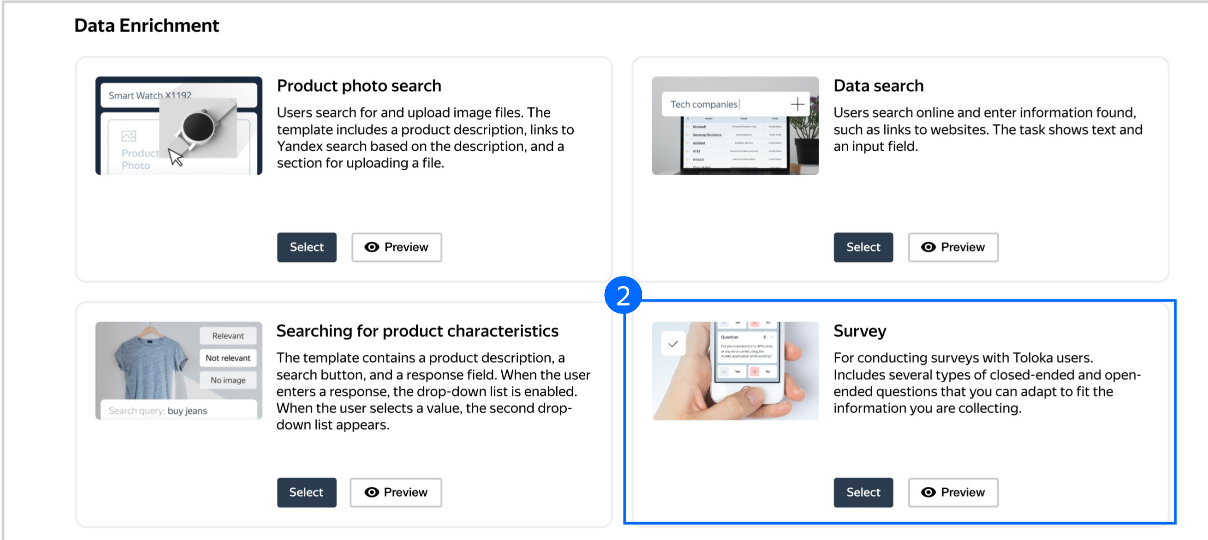
Survey manual

Create a project

1. Click **Create a project.**

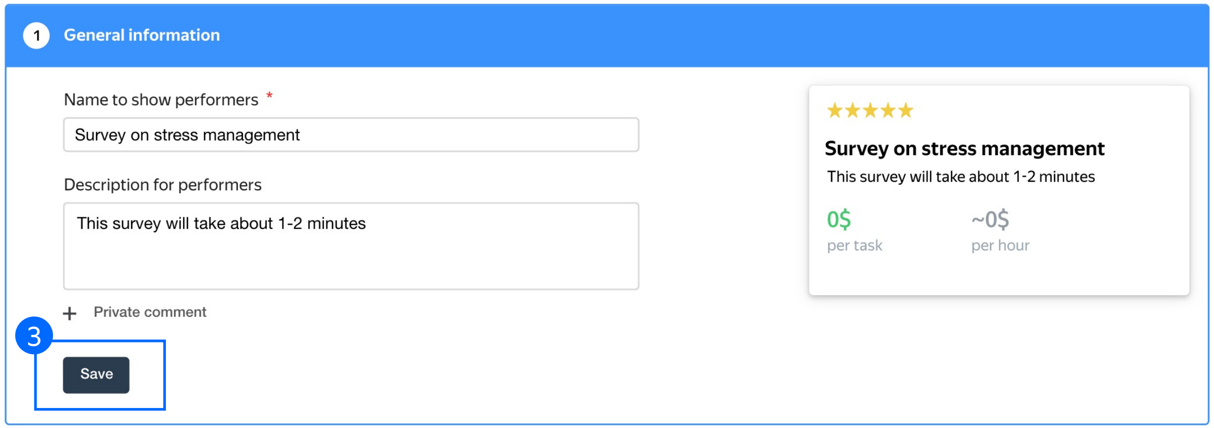


2. Choose the **Survey** template.



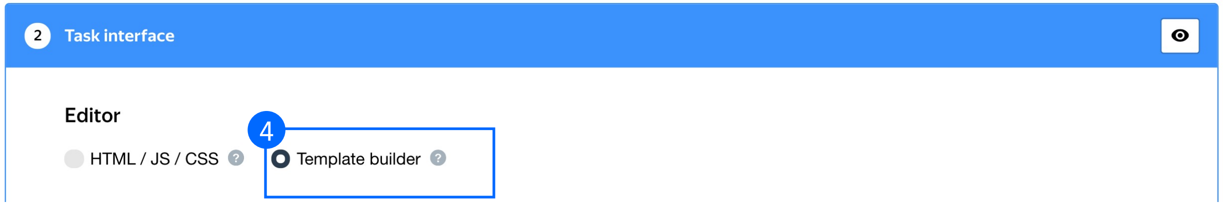
3. Enter a clear project name and description. Click **Save.**

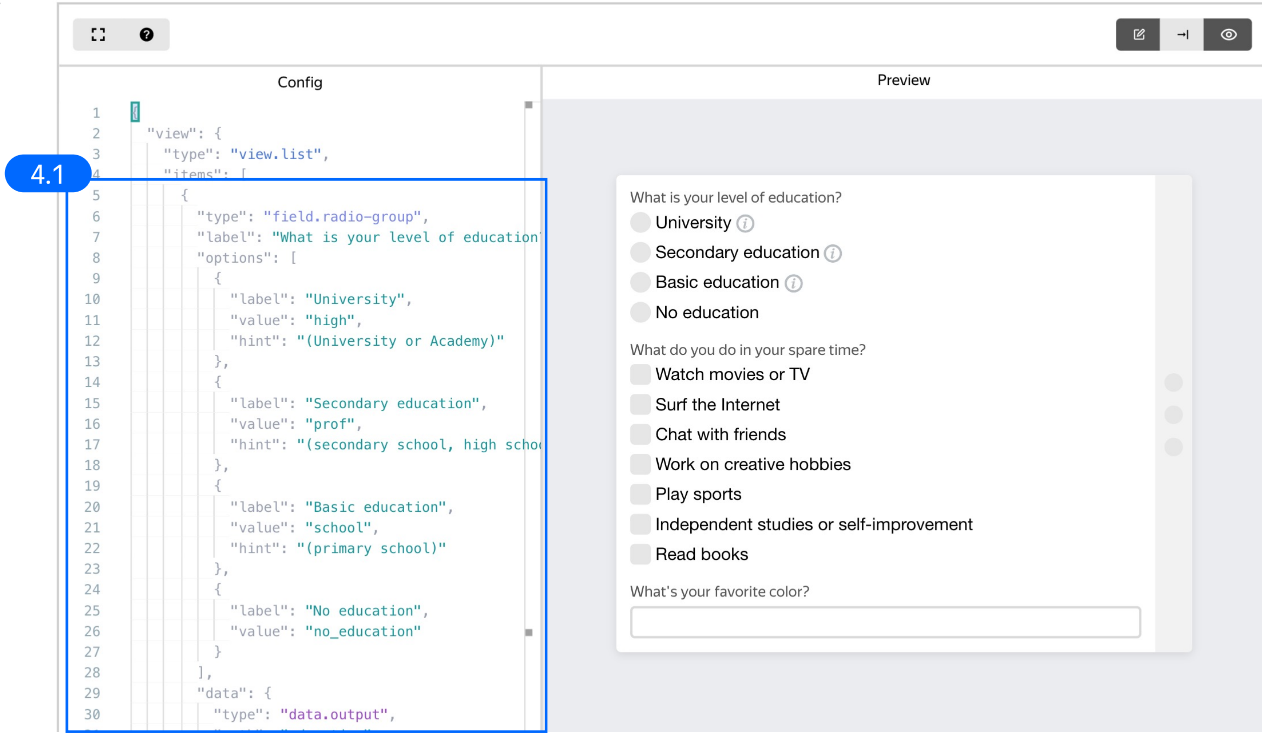
Note: The project name and description will be visible to the performers.



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

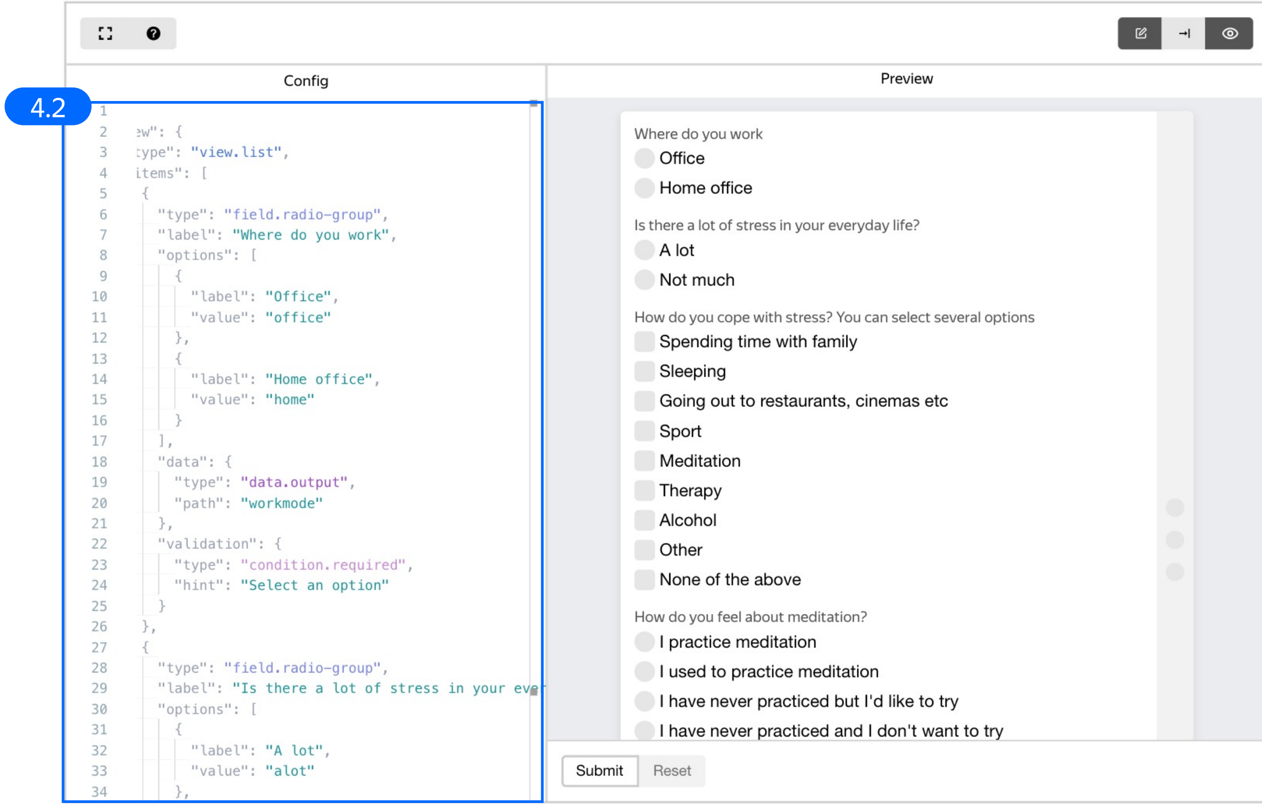
   Read more about the [Template builder]() in the Requester's Guide.





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

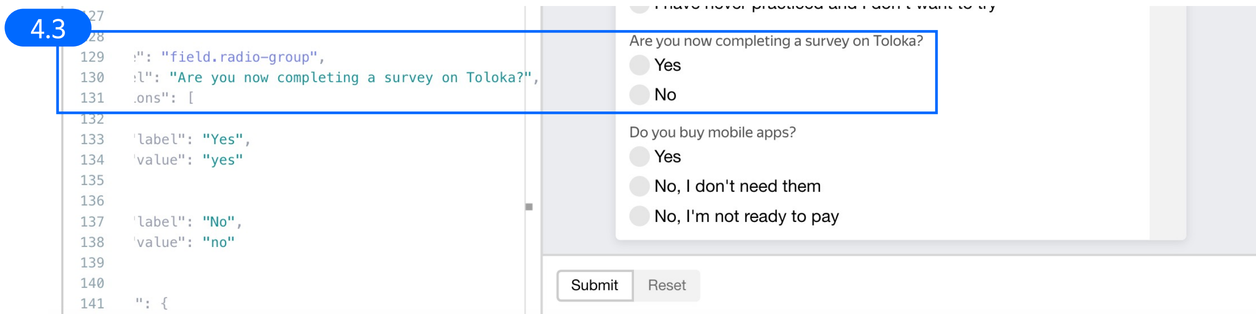
4.2. Replace the default question and answers with the ones you need. Add more questions if you like. Make sure to replace not only the questions, but also the **“data / path”** field: this is the key to which all answers to the question will belong.



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.

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.

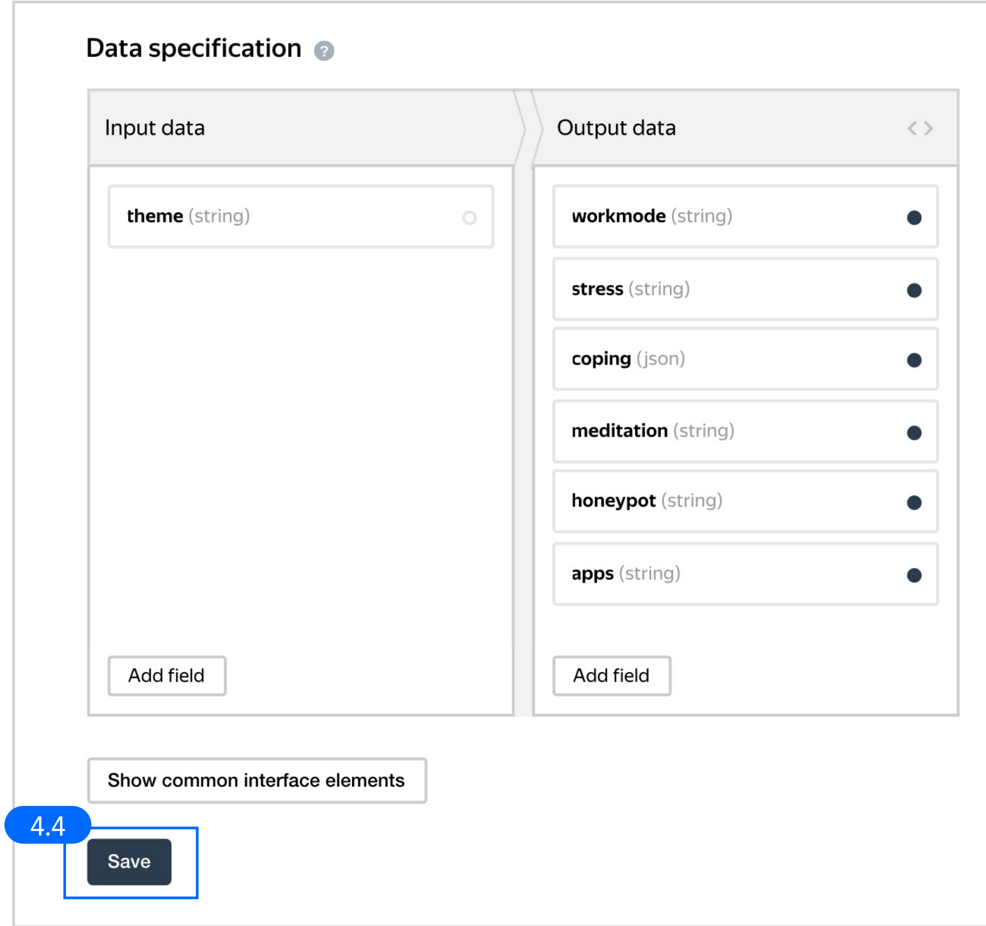


Learn more about this in the **Create a pool** section.

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.

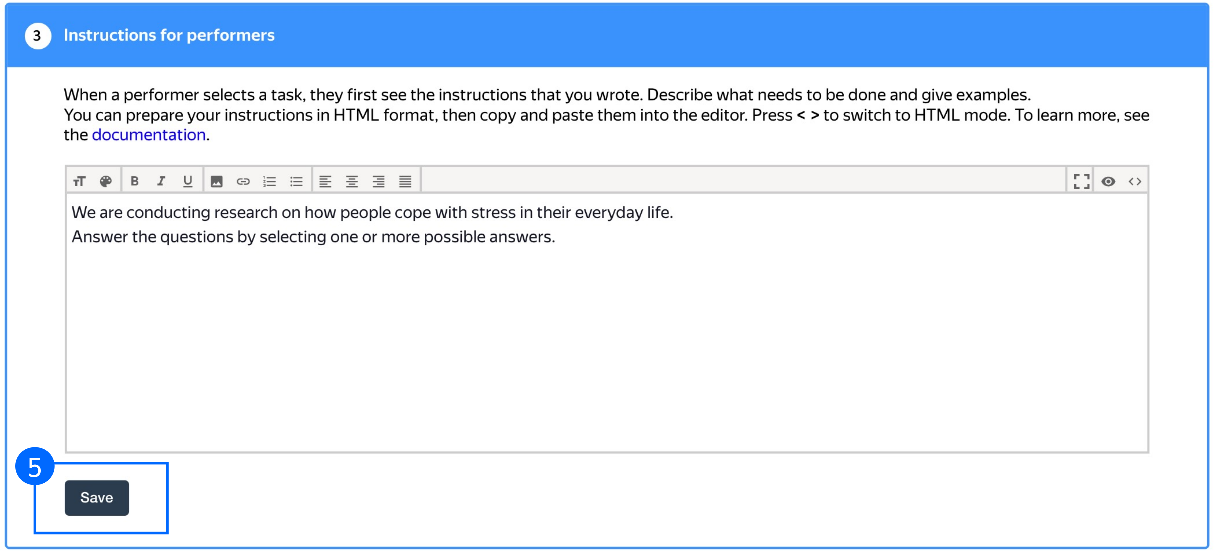
Read more about input and output data specifications in the Requester's Guide.



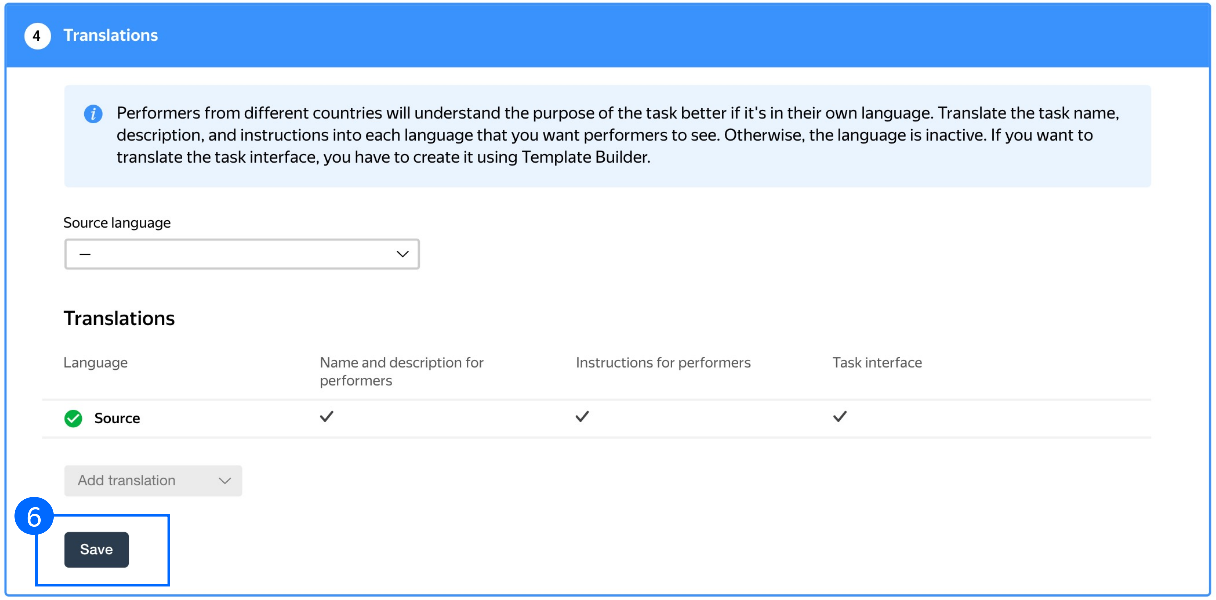
5. If there is anything important about the survey that the performers should know, put it in the instructions. In that case, the attention check question can be based on this information.

   Click **Save.**

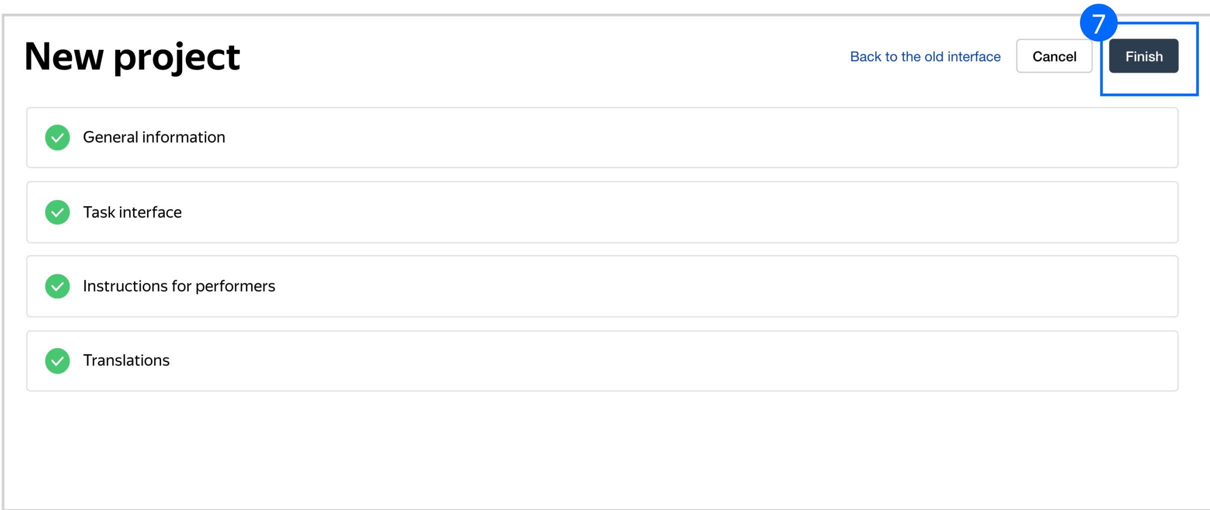
   Get more tips on designing instructions in our Knowledge Base.



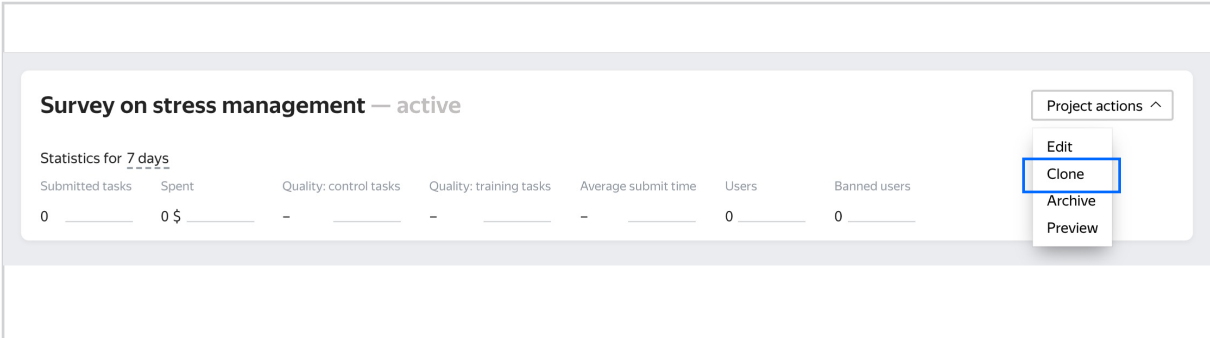
6. Fill in **Name and description** and **Instructions** in the **Translations** block for each language that you want performers to see. If you leave these fields empty, the language is inactive. Click **Save.**



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



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

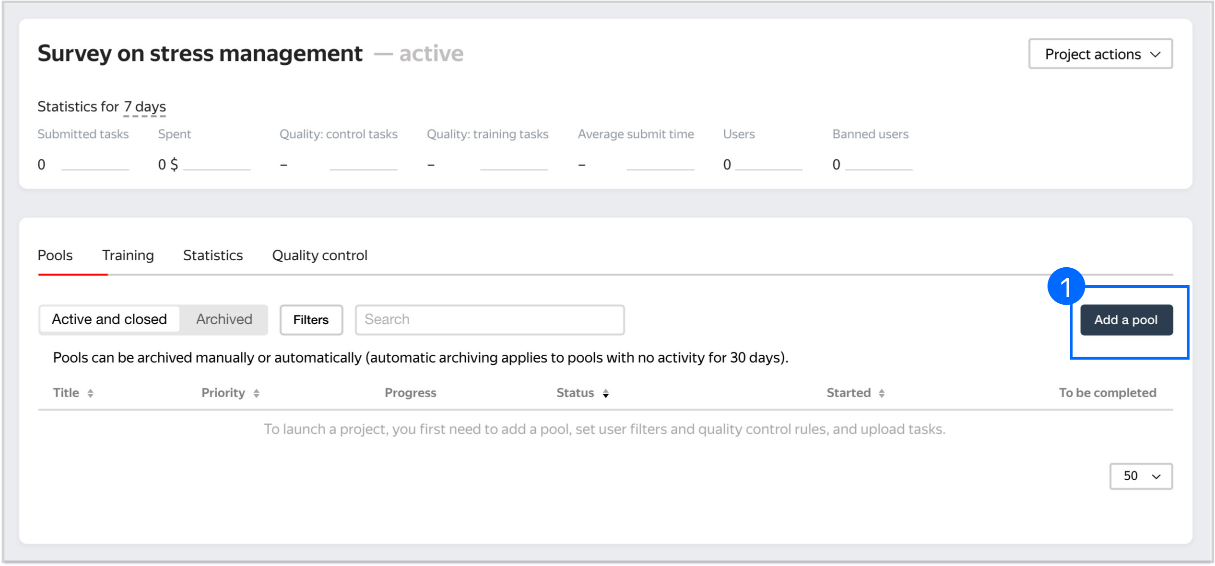


Create a pool

1. Click **Add a pool.**

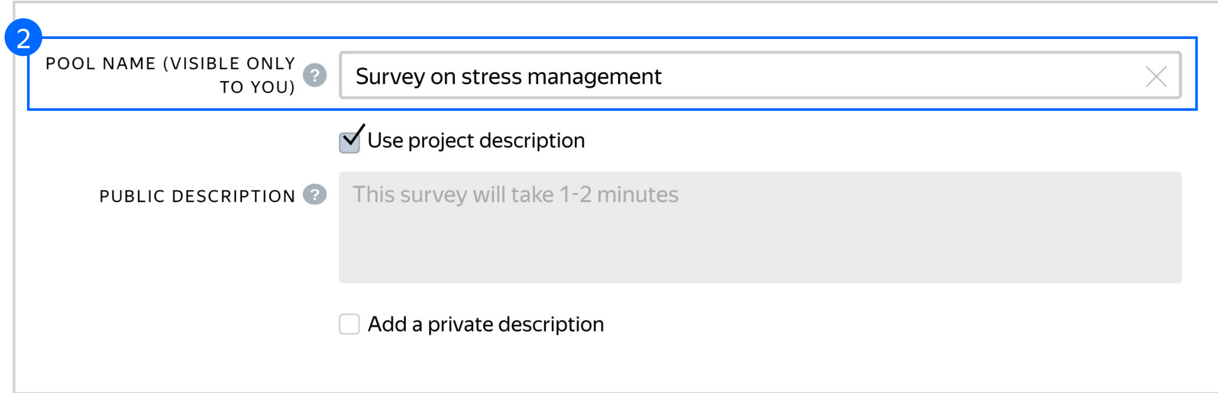
   A pool is a set of paid tasks grouped into task pages. These tasks are sent out for completion at the same time.

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



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

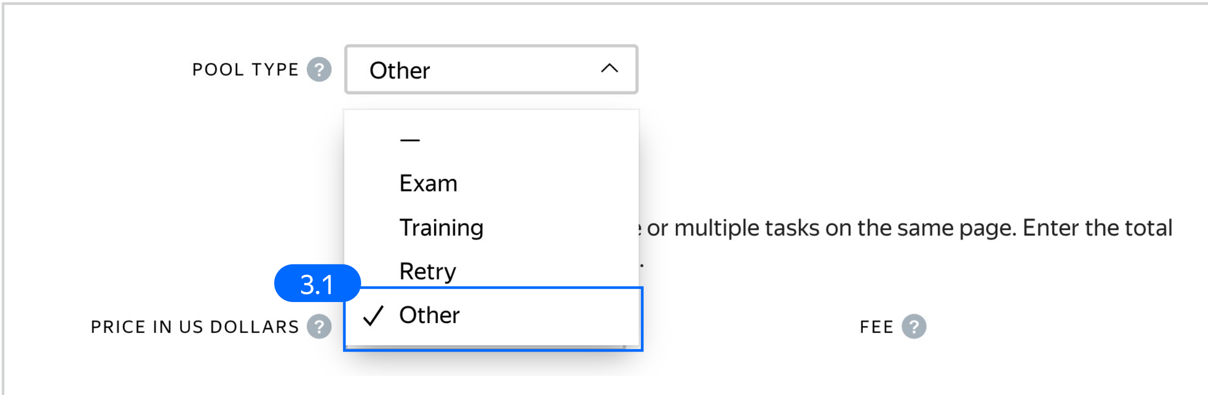
   The description can be either public or private. Choose the option you prefer.



3. Specify pool parameters:

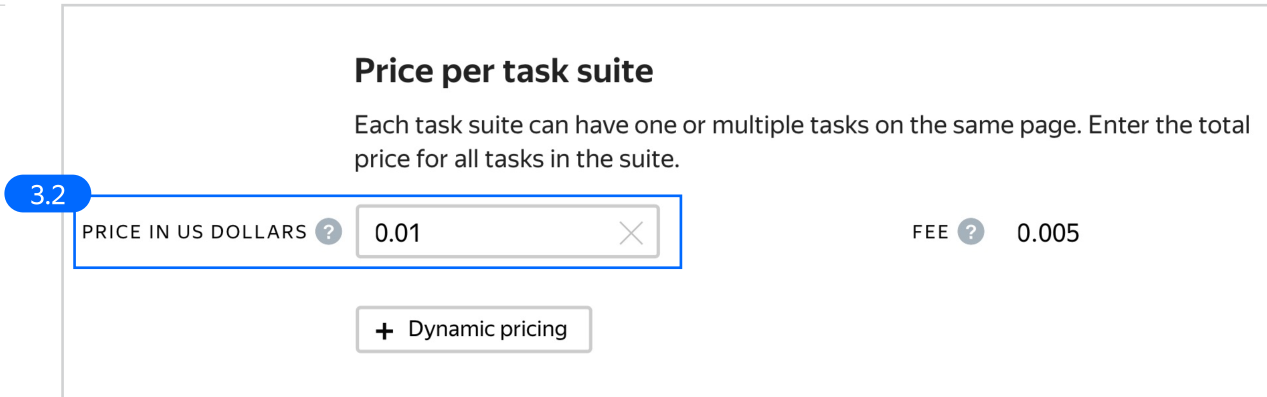
3.1. Select pool type. Choose **Other.**

Read more about pool types in the Requester's Guide.

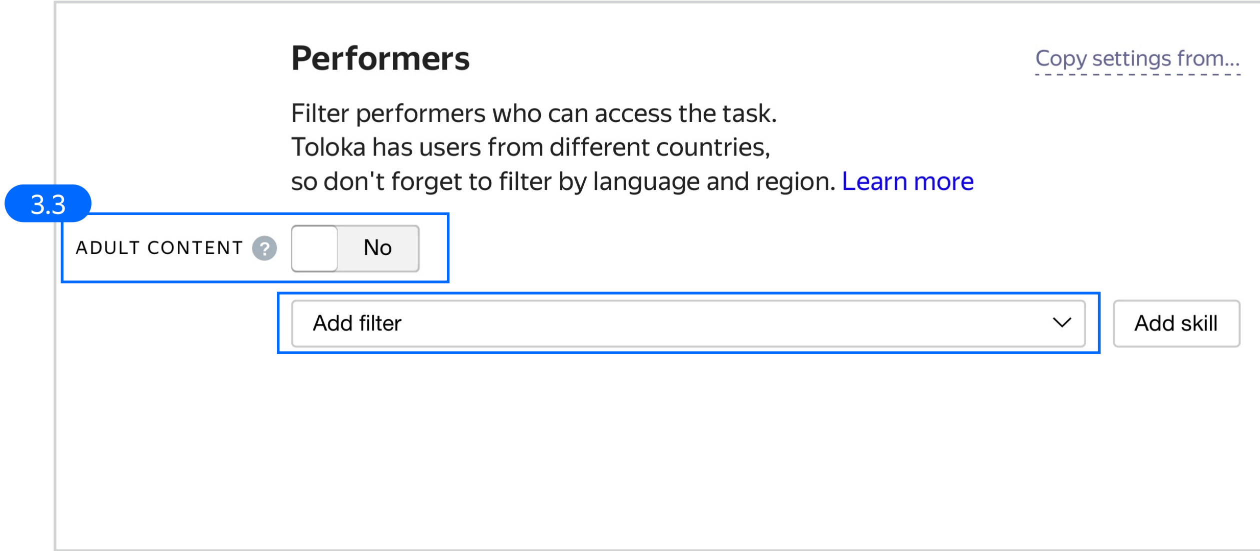


3.2. Set the price per task suite (for example, $0.01). Surveys are quick and don't require any extra training, so the price can be basic.

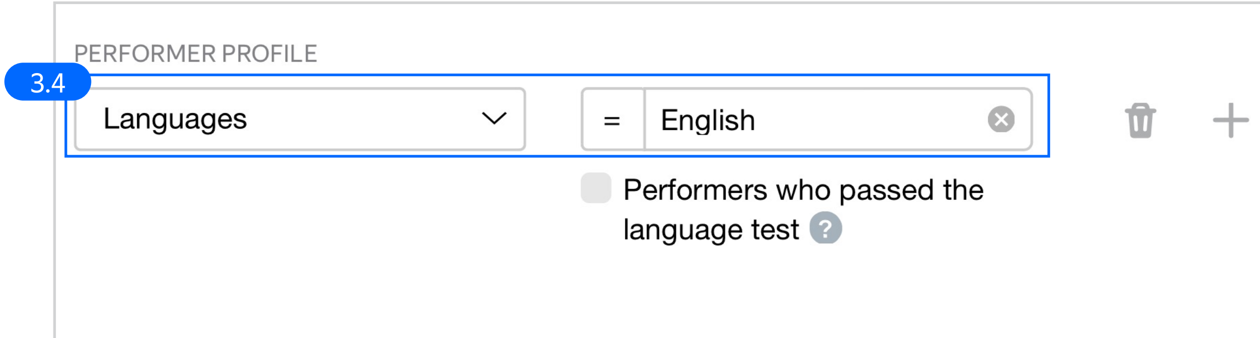
Read more about pricing principles in our Knowledge Base.



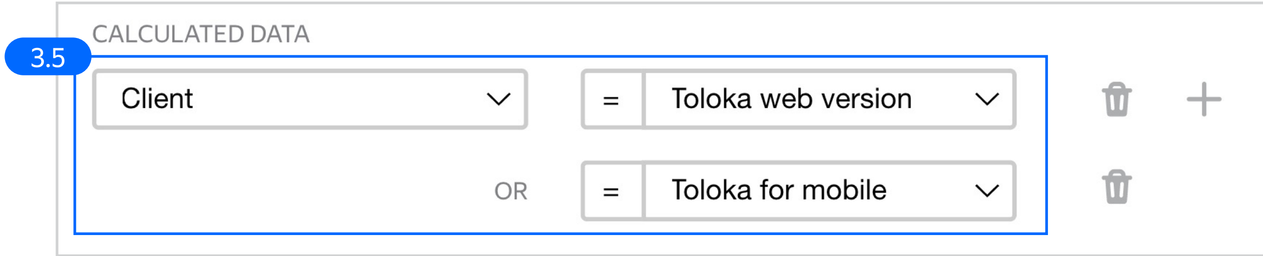
3.3. Filter performers who can access the task. Choose **“No”** in the **Adult content** block. Click **Add filter** to choose the **Languages** option in the list.



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

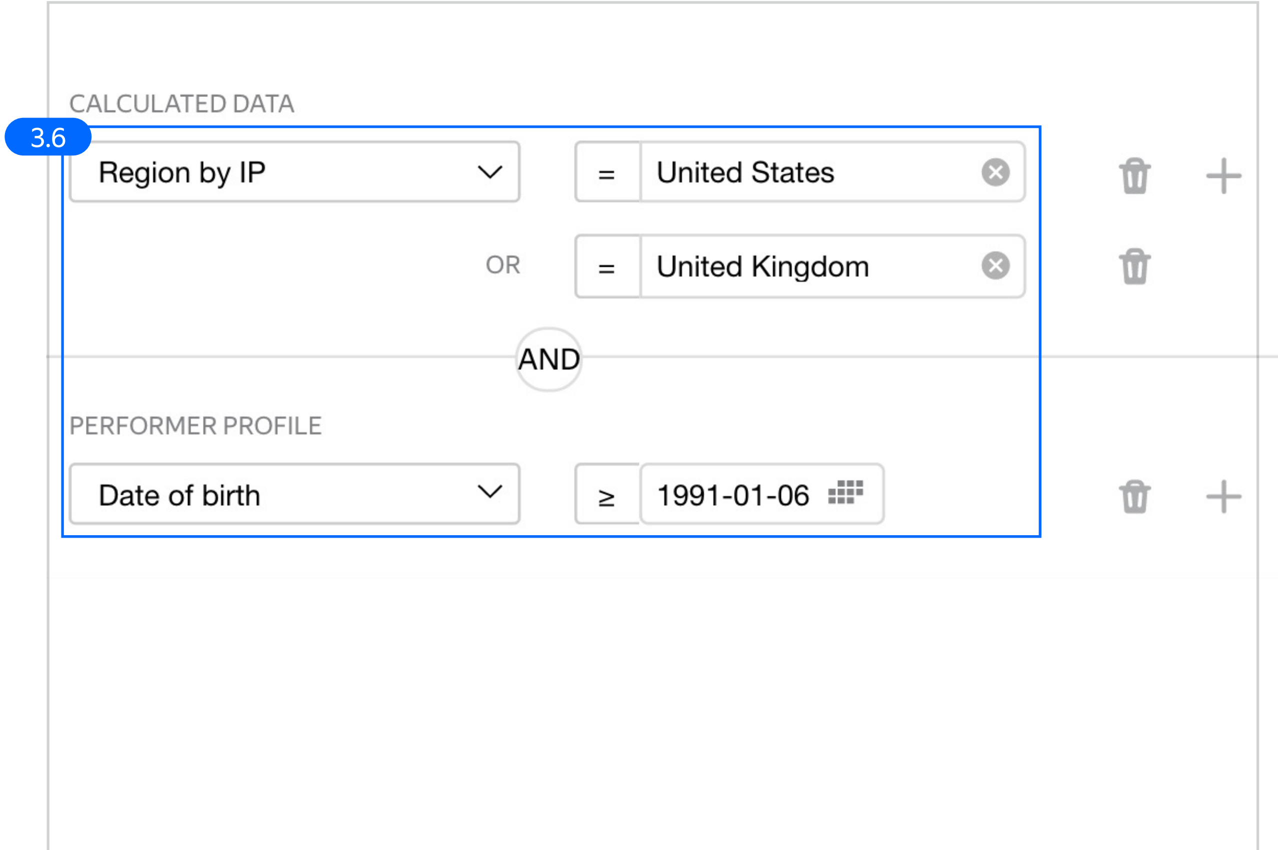


3.5. Add access from both the **Toloka web version** and **Toloka for mobile**. Most surveys are suitable for completion on a mobile device, and it will speed up pool completion.



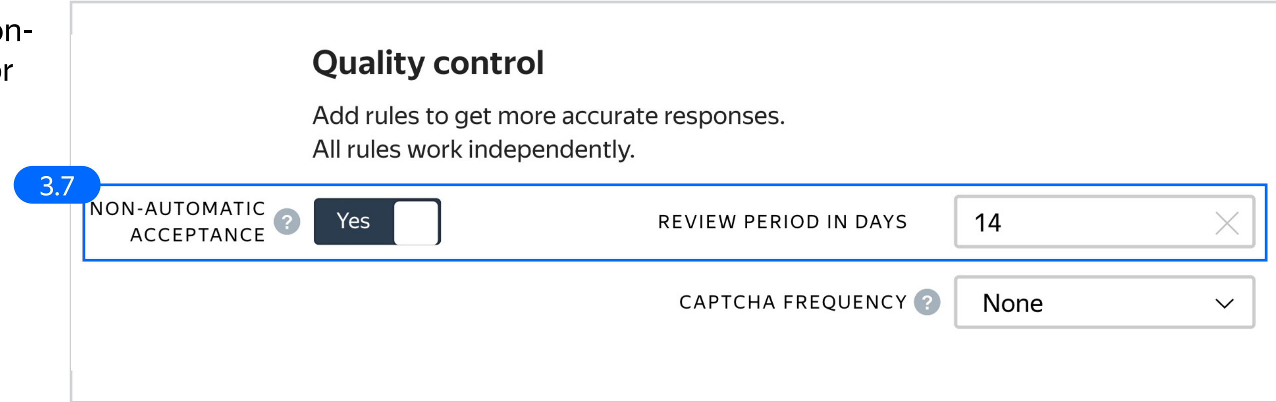
3.6. Add other filters that you consider necessary. For example, we would like to run our survey on people living in the UK and the USA who are over 30.

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.



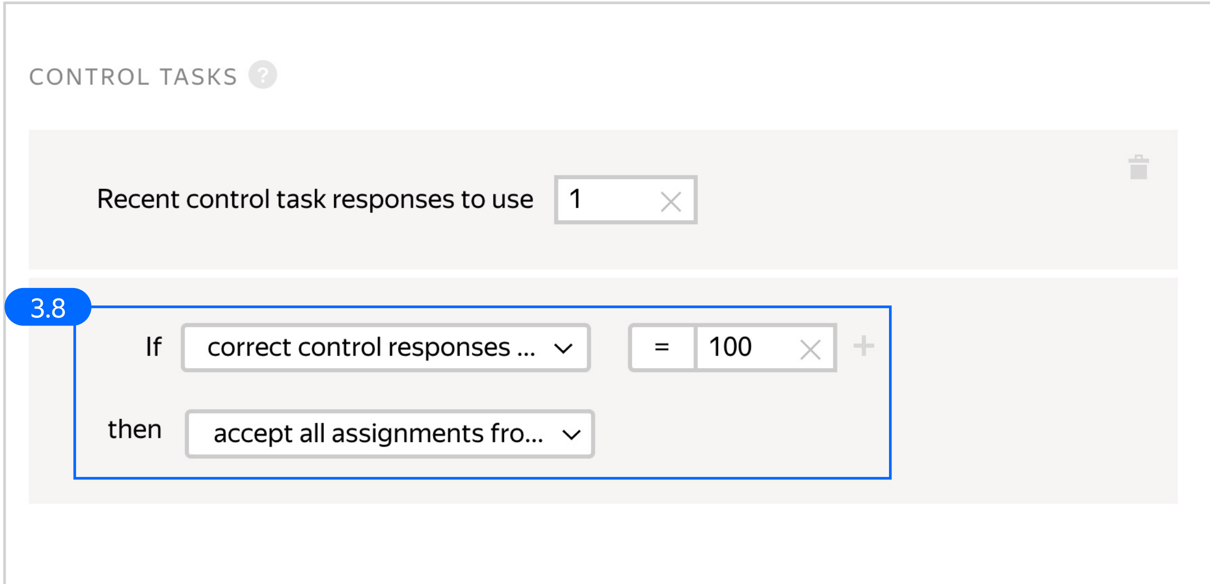
3.7. Set up Quality control. We will use non-automatic acceptance. The reason for accepting the task will be a correct answer to the attention check question.

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



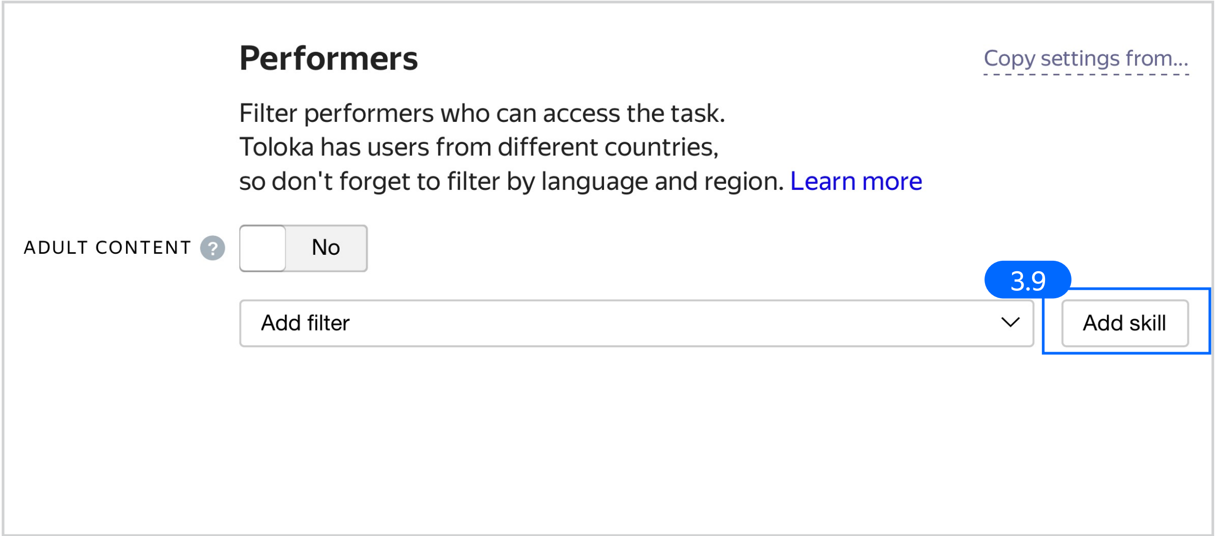
3.8. Then, choose **Control tasks.** If the number of responses is at least 1 and the correctness of the responses = 100%, then the answer will be auto-accepted.

Read more about configuring this rule in our Requester's Guide.



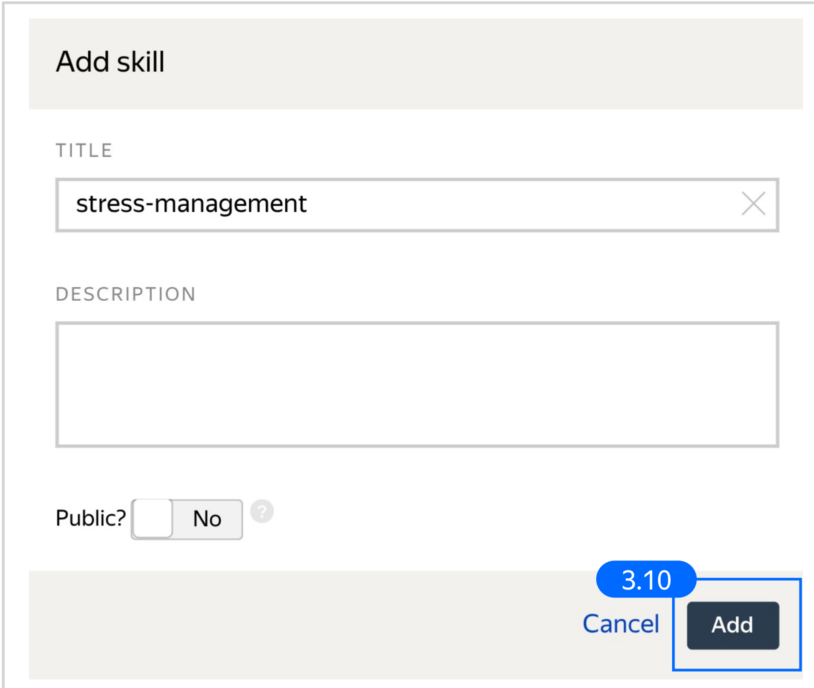
3.9. Create the **“Stress management”** skill that will reflect response quality. It can later be used if you re-run the survey and need to exclude those who have already taken part in it.

Click **Add skill**.

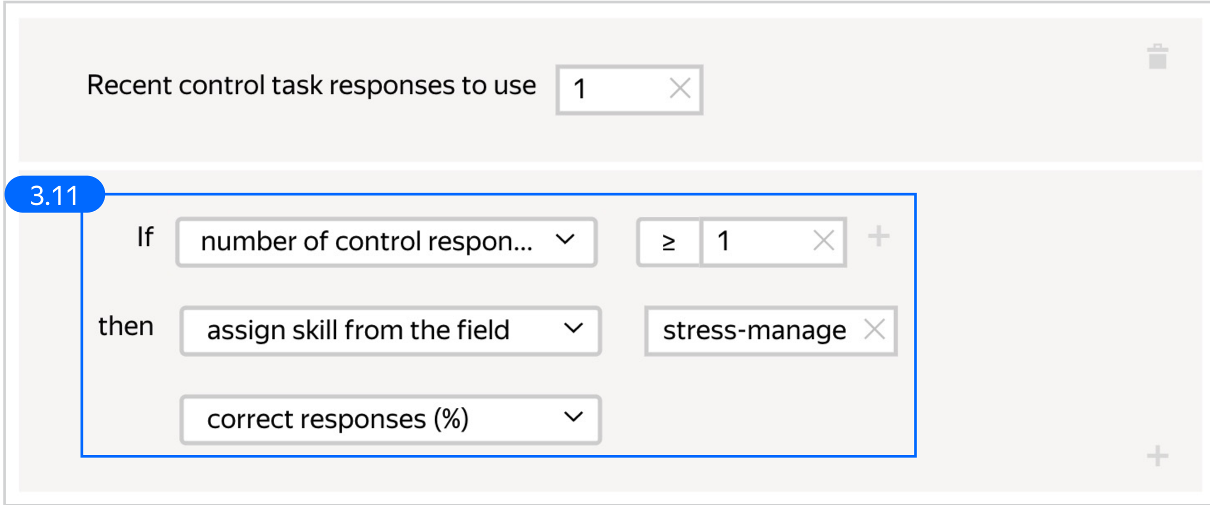


3.10. Enter the skill name and add a description if needed. You are the only one who will see it.

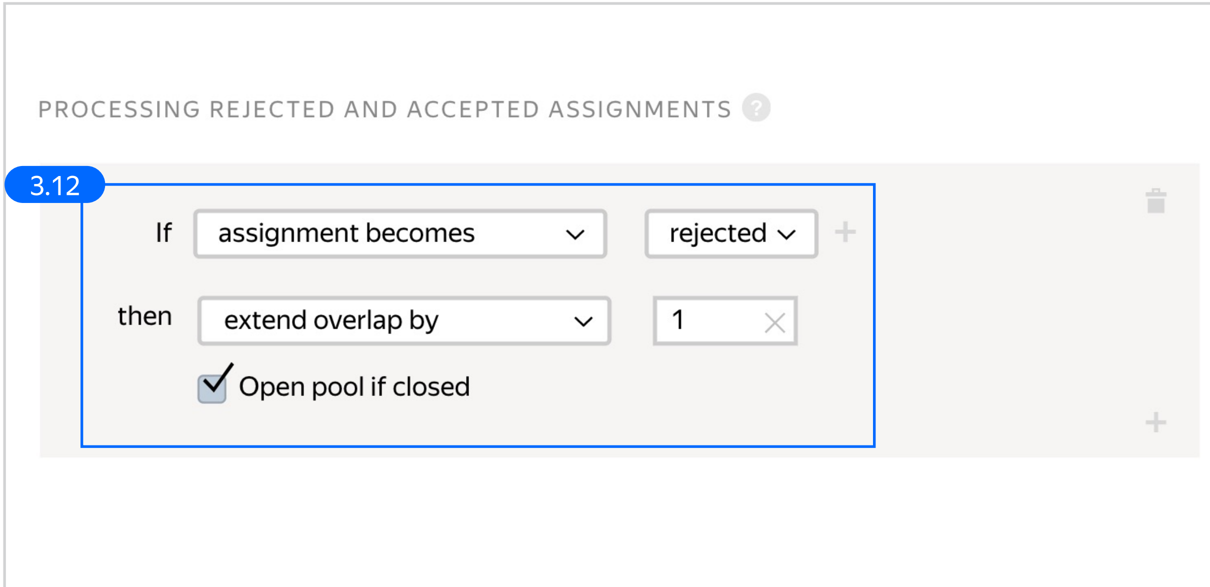
Leave the skill private, as default, and click **Add.**



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

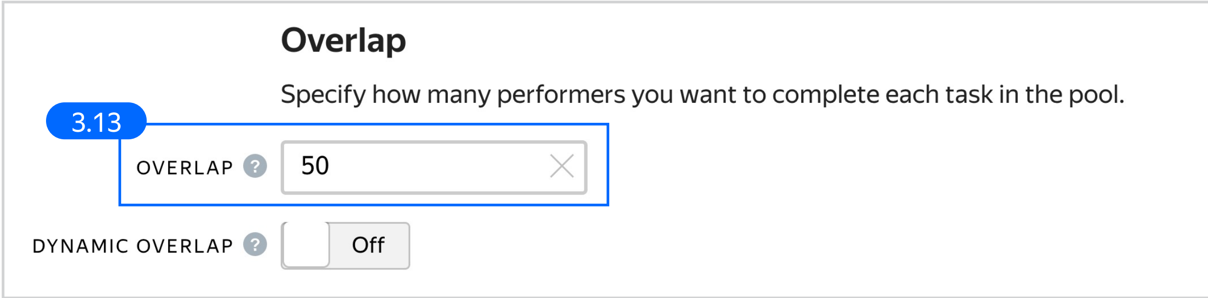


3.12. Add the **Processing rejected and accepted assignments** rule. If an assignment has been rejected, the task will be sent to another performer.



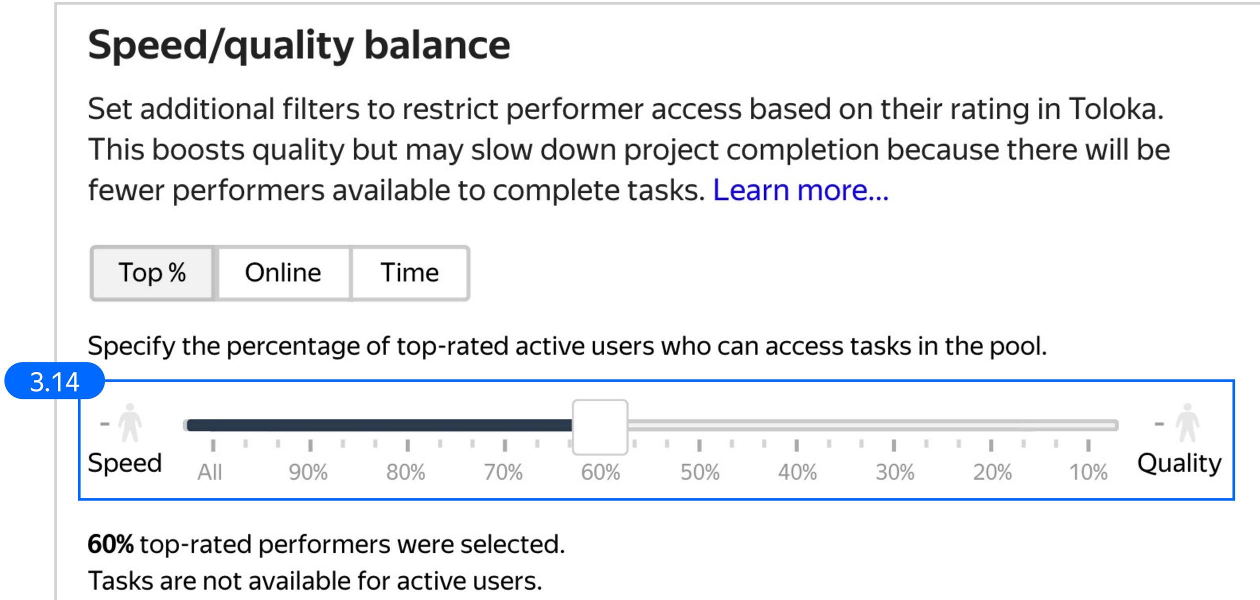
3.13. Overlap. This is the number of users who will complete this survey. For example, 50.

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



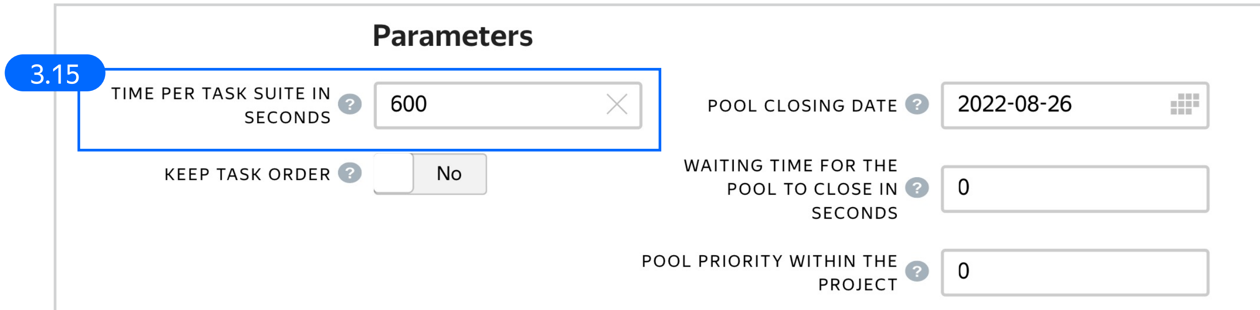
3.14. Optionally, specify the percentage of top-rated performers in the [Speed / quality balance]().

Note: This can slow down pool completion.

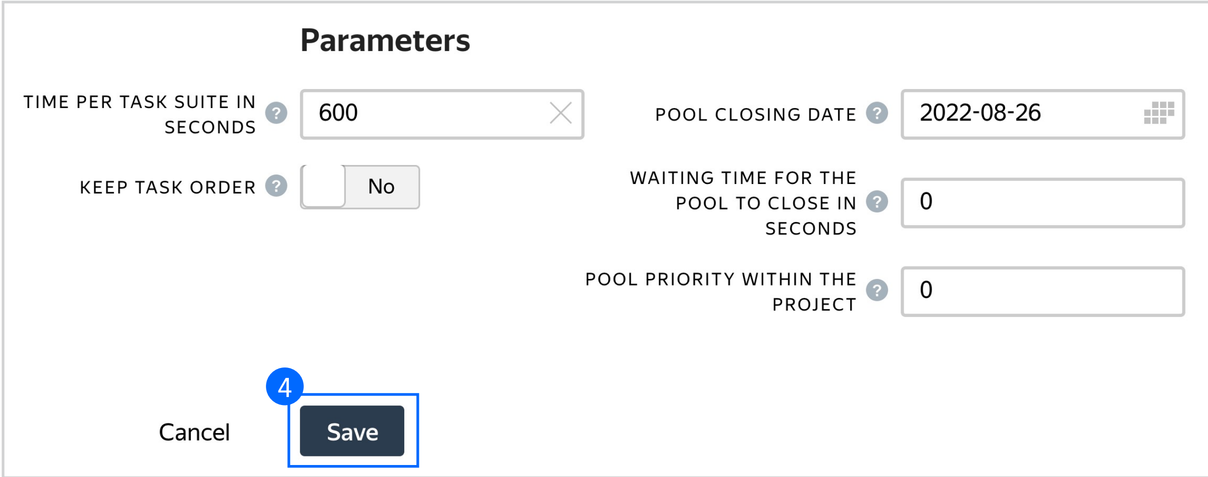


3.15. Time given to complete a task suite (for example, 600 seconds).

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



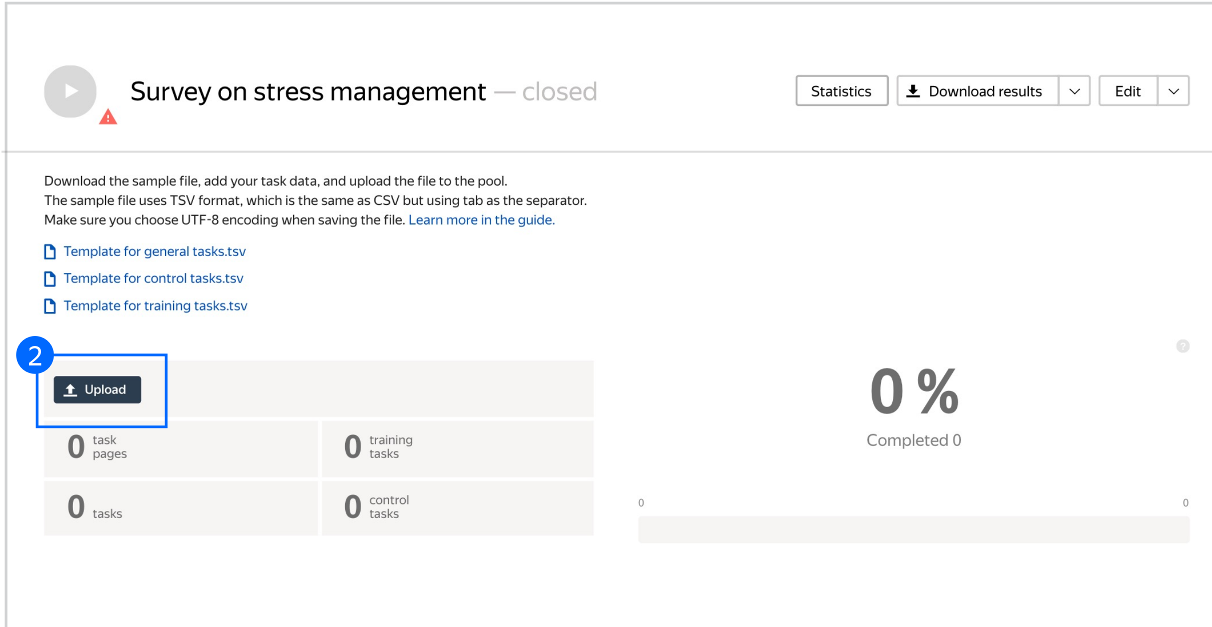
4. Click **Save** to save Pool parameters.



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.

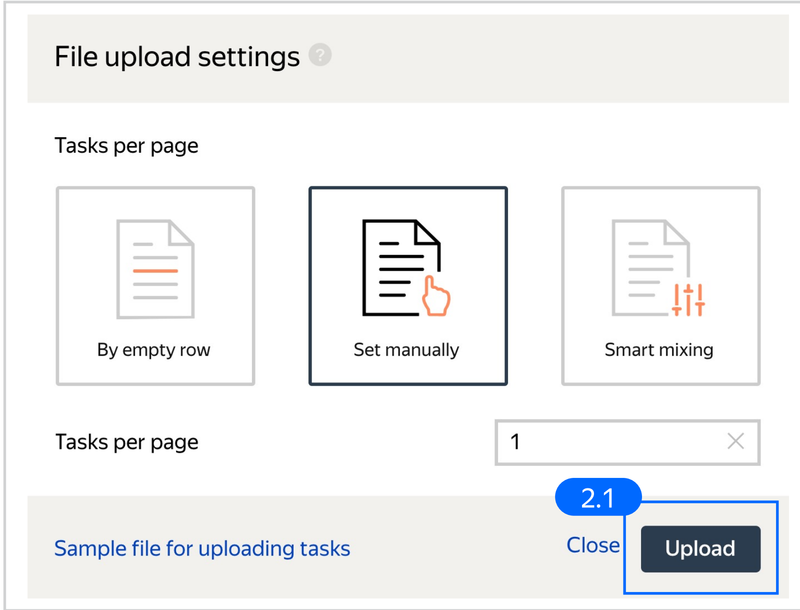


2.1. Select **Set manually** and choose 1 task per page.

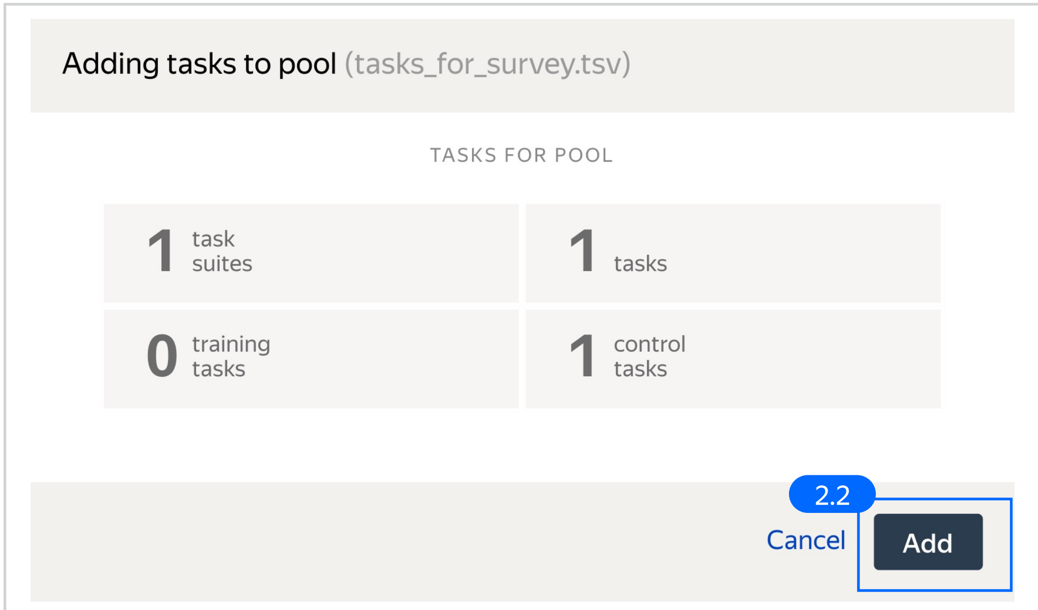
To learn more about grouping tasks into suites, read the Requester's Guide.

Click **Upload** again.

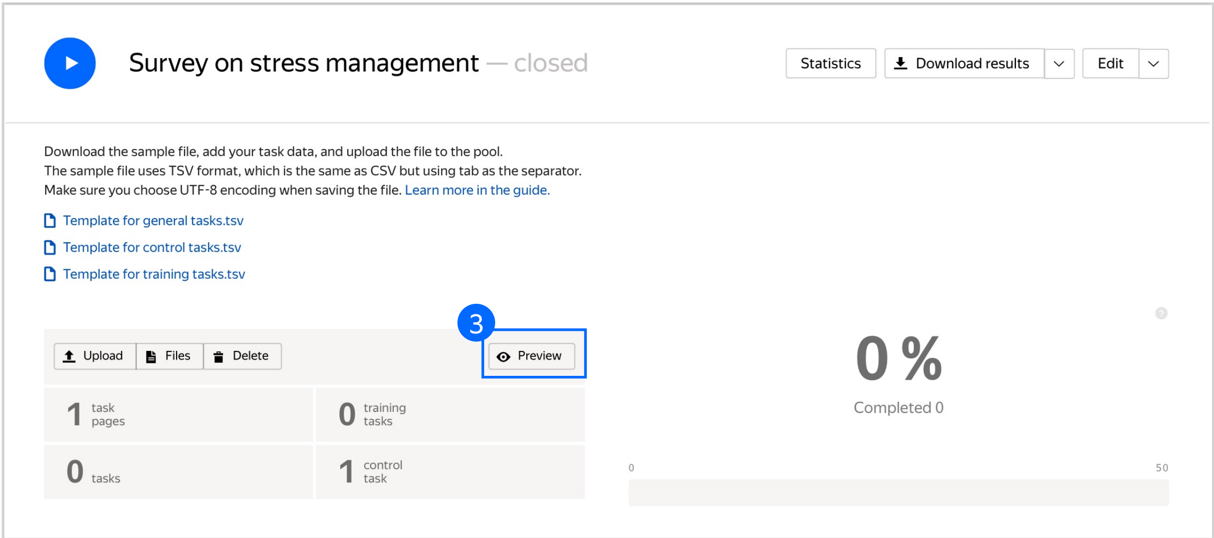
Note: If you changed the name of the input field, change it in the file as well.

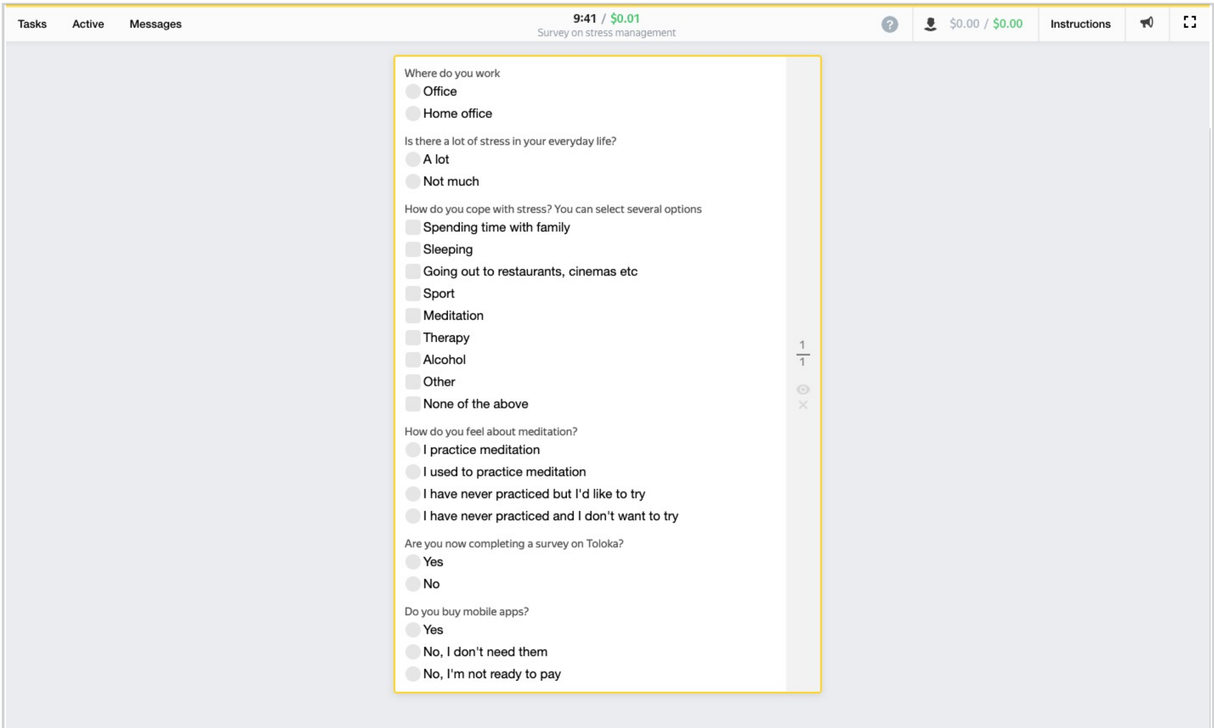


2.2. In the pop-up window, click **Add** to add tasks to the pool.



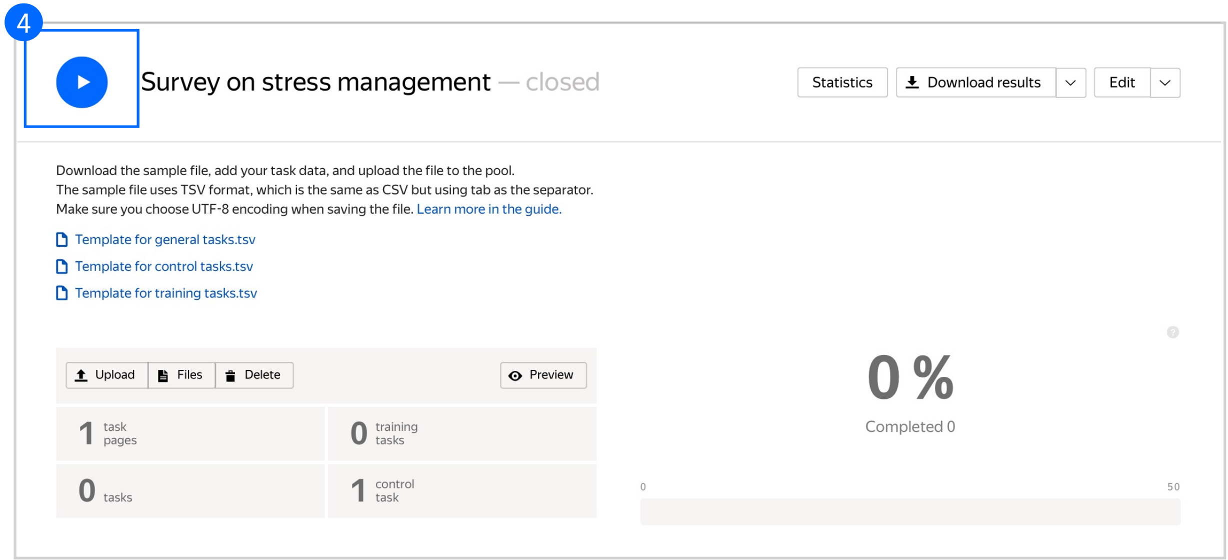
3. Preview the pool.





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.

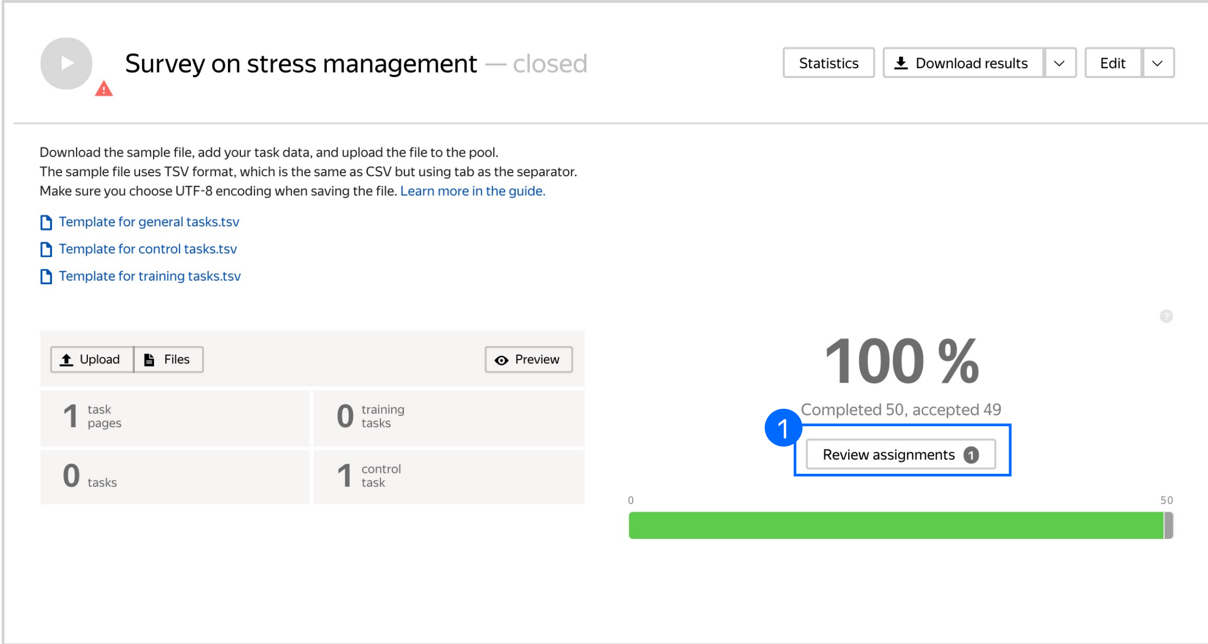


Receiving responses

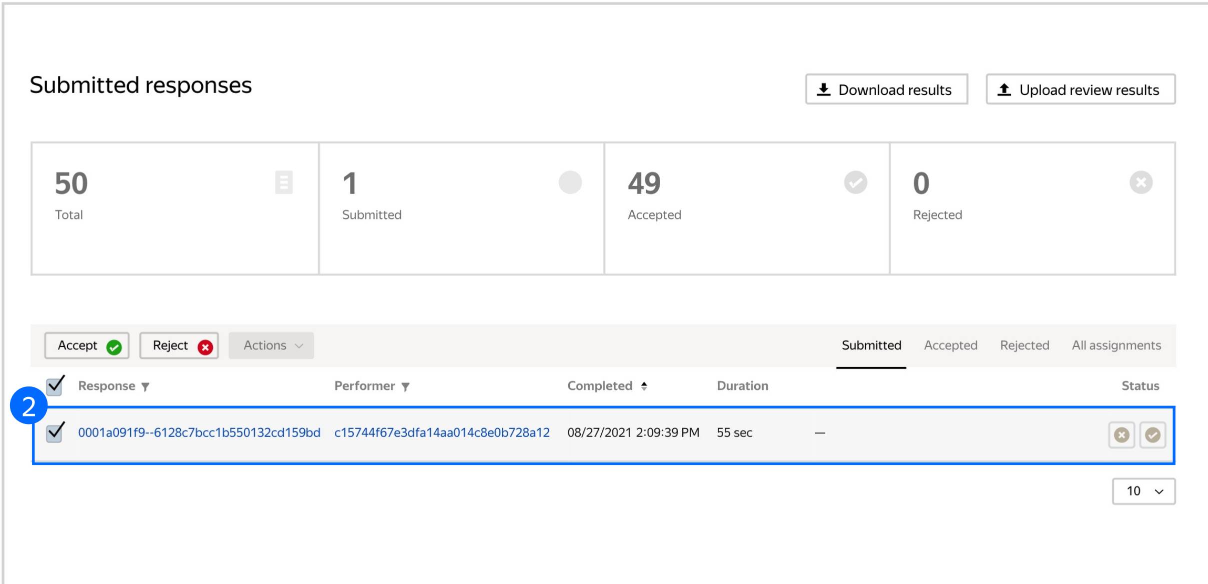
1. Wait until the pool is completed. Refresh the pool page to check progress.

   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).

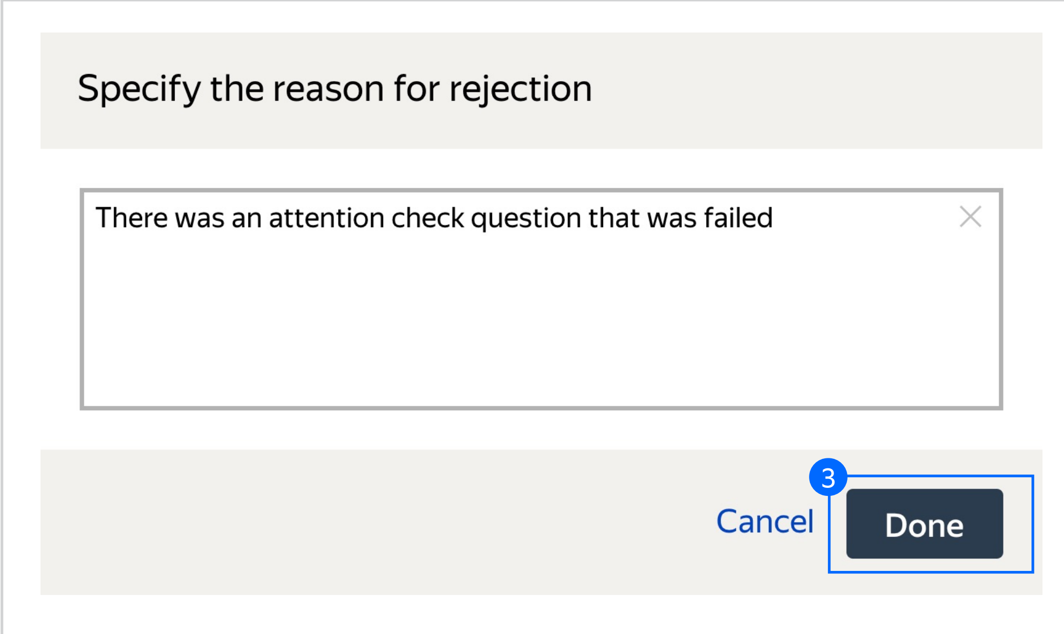
   Click **Review assignments.**



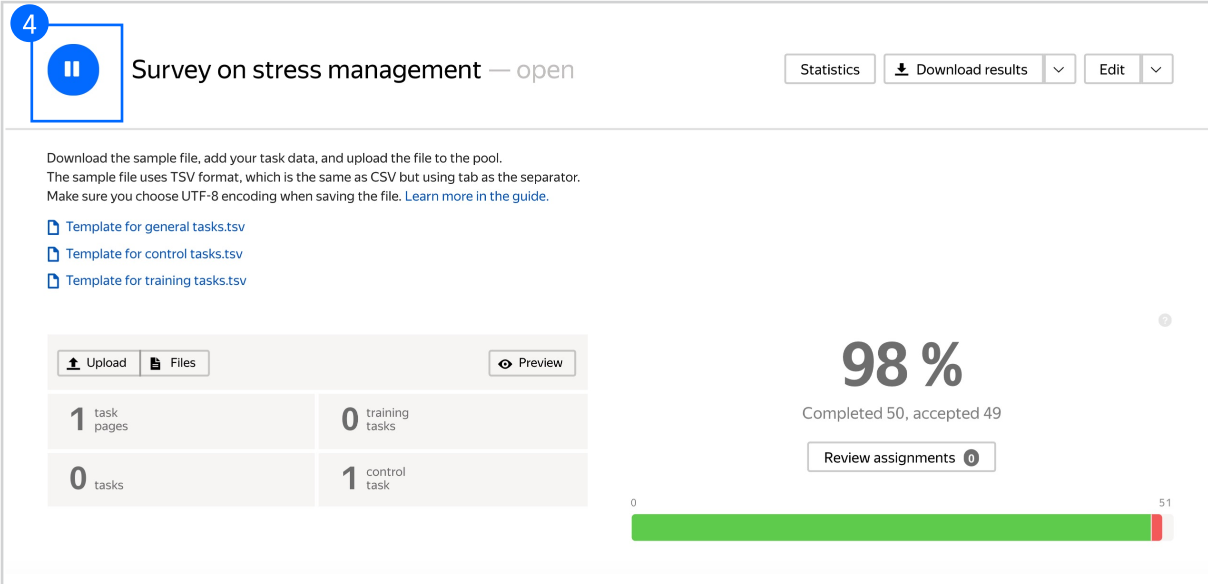
2. Select all the assignments in the **Submitted** list and click **Reject**.



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

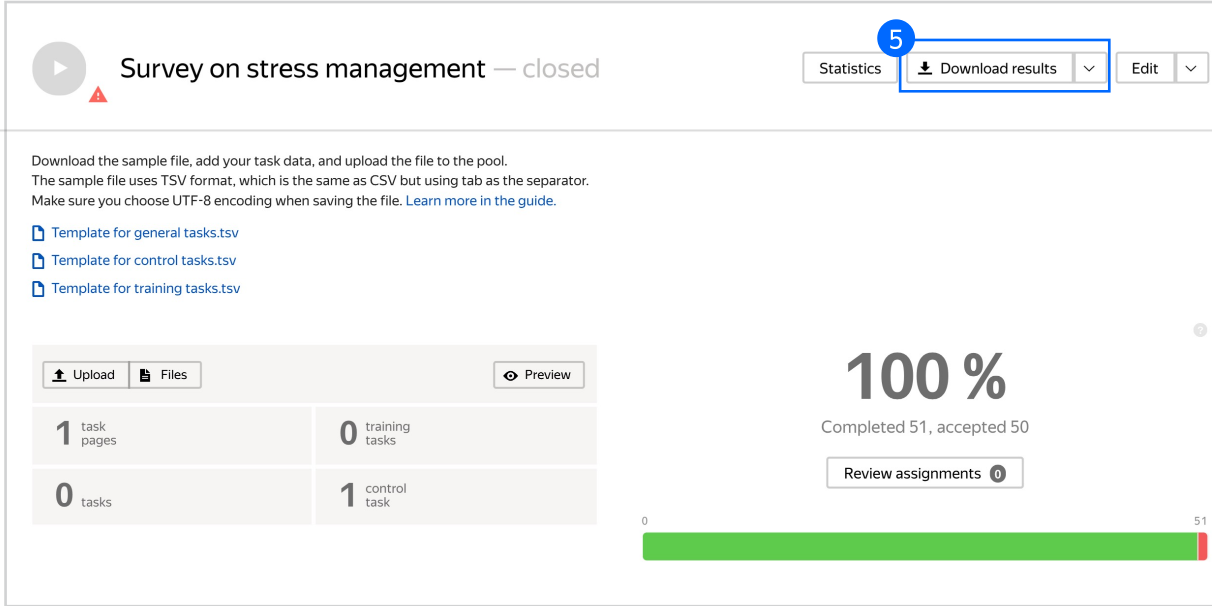


4. Go back to the pool and wait for extra assignments to be completed.

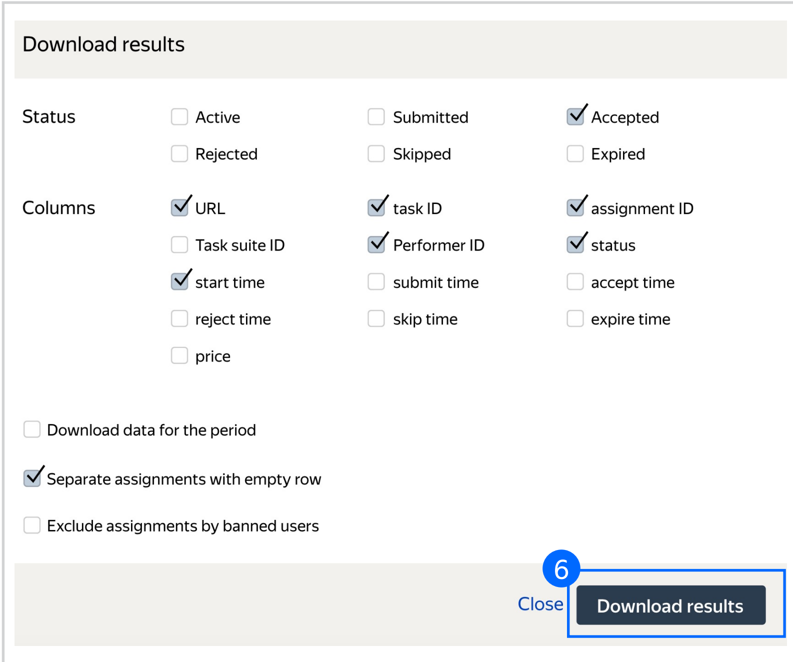


Note: These were generated because of a setting we applied in **Section 3.8** of the **Create Pool** section.

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



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



Appendix

Interface config
Step 4.2.


```json
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            "value": "office"
          },
          {
            "label": "Home office",
            "value": "home"
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        }
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          },
          {
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          }
        ],
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        }
      },
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          },
          {
            "label": "Sleeping",
            "value": "sleeping"
          },
          {
            "label": "Going out to restaurants, cinemas etc",
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          },
          {
            "label": "Sport",
            "value": "sport"
          },
          {
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            "label": "Alcohol",
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          },
          {
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            "value": "other"
          },
          {
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            "value": "none"
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            "value": "practice"
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          {
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            "value": "usedtopractice"
          },
          {
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            "value": "wanttotry"
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          {
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            "value": "dontwant"
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          {
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          }
        ],
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            "value": "yes"
          },
          {
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            "value": "dontneed"
          },
          {
            "label": "No, I'm not ready to pay",
            "value": "dontpay"
          }
        ],
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