This set of instructions follows the set for creating a new project, and assumes that a survey project has already been started. This tutorial also assumes a certain familiarity with conditional branching. For an introduction to how conditional branching works, please contact the Help Desk to set up one-on-one training with a member of IT Services.

Conditional branching is created by sending the respondent in one direction or another, based on the answer of an initial question. Because of this structure, the questions must be created for both branches first, on separate pages, and then rules are created and applied to those questions to control the respondent's path through the survey.

For the purpose of this tutorial, the example will use a survey with the following branching structure:
To create conditional branching within a survey project:

1. At the upper left, click **New**

2. From the list that appears, select the **question type**

   For this tutorial the type is dropdown.

3. Create the **branching question** with the answers

   For this tutorial, question:
   - "Are you a faculty member, staff member, or a student?"

   Answers:
   - "Faculty"
   - "Staff"
   - "Student"

4. Click **Ok**

5. At the top, create a new page for each branch

   For this tutorial, insert two pages: one page for faculty/staff, one page for students. If you already have pages, you will be asked to confirm; on the Insert Page confirmation, click **Insert After**
6. Use the page arrows to go to the page for the **first branched answer**

7. Add the **questions** for that page

   For this tutorial:

   - "What is your office location?"
   - "What is your office phone number?"
   - "What are your office hours?"

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8. Go to the page for the **second branched answer** and add the questions for that page

   For this tutorial:

   - "Please select your class year:"
   - "Please indicate your residence:"

Now that the questions are all in place, add the conditional logic rules.
9. Use the page arrows to return to the page with the branching question

10. Click on the question that will branch, hover the mouse over the question part until the edit icon appears; click the edit icon

11. Click the Skip Logic tab

12. Use the dropdown menu to indicate the page where each answer will be directed

13. Click Ok

14. Use the page arrows to go to the page where the first answer directs the respondent

   For this tutorial, it will be Page 2, for the answer Faculty. On Page 2, we will set up the third question to display only for faculty, and set up the page to skip over Page 3 because Page 3 is for the answer Student.

15. Click on the question that will appear only for faculty, hover the mouse over the question part until the edit icon appears; click the edit icon

16. Click on the Display Logic tab

17. Click Add Condition
Baseline Survey Tool from Campus Labs
Creating Conditional Branching within a Survey

A rule will appear: when [question] has [answer] [selected|not selected] then display.

18. Use the dropdowns in the rule to select the appropriate question/answer/selection combination

The rule logic will display in the gray area at the bottom of the popup. Multiple conditions may be added and grouped, if desired.

19. Click Ok

20. At the top of the page, click the page edit icon

21. Click on the Skip To tab

22. Use the Skip to Page dropdown to select the appropriate page

23. Click Ok

You will now want to check the logic flow of your survey, using the Outline and Preview functions.

24. At the top of the page, click Outline

Confirm that all rules have been created correctly by viewing the survey outline, in which all questions, answers, and actions are displayed in one page. This may open in a separate window or tab.

Make any changes necessary.
Baseline Survey Tool from Campus Labs  
Creating Conditional Branching within a Survey

Next, confirm that all rules have been created and applied correctly by previewing the survey.

25. At the top of the Project Builder page, click **Preview**

26. When finished, close the Preview screen and return to the administrative screens by clicking **Done Editing**

If you have any trouble with the above process, please contact the Help Desk in the Library Learning Commons or 315-781-4357 (ext. 4357/HELP on campus) or helpdesk@hws.edu.