RESEARCH AUTOMATORS

Automation tab

Survey Automator guide

Automation tab

GUIDE DATA AND INTEGRATIONS

The Automation tab in Survey Automator

The Automation tab lets you schedule recurring tasks in the project. It's an efficient way to automate time-consuming tasks such as syncing, exports, and report runs. This can be especially important in projects with a high volume of activity.

What You Can Schedule in the Automation Tab

When you create an automation, you can add one or more *automation tasks*.

Synchronize

Retrieves all new responses and updates participants' statuses.

Recommended as the first step.

Export Responses

Creates a raw data export of responses.

Report

Automatically runs one or more report templates and generates report files.

Save to project

Saves the results from a previous task (e.g., Export or Report) to the file library (**Project Files**).

Here, you must specify *which* previous task to save, e.g., "A1" or "A3".

Example: Create a nightly automation for report export

1. Go to **Automation** in the project's top menu.
2. Click **NEW AUTOMATION and** give it a name, such as*"Automation-Night*."
3. Click **+** and add:

   A1 – Synchronize

   Retrieve all responses.

   A2 – Report

   Select the report templates to run.

This creates report files.

A3 – Save to project

Select *A2*.

This saves the files to **Project Files**.

4. Under **Schedule**, select, for example, **Daily → 3:00** a.m.

The automation now runs every night, and you'll get updated files in **Project Files** without having to wait in the interface.

The latest version of this guide: https://www.researchautomators.com/guides/automation-tab/