Research Exchange Operations Guide

Welcome to the Pulse Labs platform — a UX research platform that lets you run surveys and manage unmoderated evaluations, all from one place. This guide will direct you from sign-up to your first completed study.

What you can do

The platform gives researchers two core data capture methods, each designed for a different type of research question:

- **Surveys** — Build questionnaires, collect responses asynchronously, and review results as they come in. Great for screening, quantitative feedback, and large-sample studies.
- **Evaluations** — Set up unmoderated, asynchronous studies. Participants record their screen and/or camera as they complete activities you define. Review their submissions with synced video playback and transcripts.

Both methods are managed within a research project created on your workspace. A single project can contain multiple surveys and evaluations.

Your first study at a glance

1. Sign in

Go to the Pulse Labs platform and sign in with Google, Microsoft, Apple, or your email (you'll receive a six-digit code — no password needed). New users complete a short profile setup.

2. Pick or create a workspace

A workspace is your team's shared environment. If your organization already has visible workspaces, you'll see it listed after sign-in. Otherwise, create a new one and choose a privacy level (**Open** or **Hidden**).

3. Create a project

Inside your workspace, go to **Projects** and select **Add Project**. Add a name and a short objective or overview description. Your project starts as a hidden draft visible only to you.

4. Add a data capture method

Inside your new project, select **Add Capture Series** and choose your first capture method:

- **Survey** — Paste in a survey outline to auto-generate a draft, or build one manually with the SurveyJS editor.
- **Evaluation** — Define tasks, choose device type and recording options, then launch for participants to complete on their own time.

5. Add participants

Switch to the Recruitment tab to invite your own participants, upload a CSV, or source participants from the Pulse Voices panel.

6. Launch and collect data

Launch your capture method. Responses, recordings, and transcripts appear in your project dashboard as participants complete the study.

Key concepts

Term	Definition
BYOP	Bring Your Own Participants. Invite and optionally screen and/or verify.
Capture series	A specific research instrument within a project. Each type (survey, evaluation) has its own creation flow, dashboard, and data review experience.
Evaluation	Evaluations enable participants to complete unmoderated activities across a single session or longitudinally. Each evaluation has instructions, and participants can record their screen and camera while completing them.
Participant funnel	A structured funnel that ensures participants meet your criteria and have completed any required verification steps (screener survey, location check, ID verification, and document signatures) before they access your capture methods.
Pulse Voices	Source from our proprietary Pulse Voices panel. Invite and optionally screen/verify.

Project	A container for a single research effort and a list of recruited/enrolled participants. Holds one or more capture methods (surveys, evaluations, etc.). Has its own team roles and visibility settings.
Survey	A questionnaire that lets you collect structured responses from participants asynchronously. The SurveyJS editor gives you access to a full range of question types, conditional logic, and validation rules.
Workspace	A shared environment for your team. Controls who can discover and join your research organization. Contains multiple projects.

Authentication and access

Sign in

Pulse Labs supports four sign-in methods:

- **Google** — Sign in with your Google account.
- **Microsoft** — Sign in with your Microsoft account.
- **Apple** — Sign in with your Apple ID.
- **Six-digit code** — Enter your email address, receive a six-digit code, and enter it to sign in. No password needed.

All methods use the same underlying account. You can switch between them freely as long as the email address matches.

First-time setup

When you sign in for the first time:

1. **Enter your name** — Type your first and last name.
2. **Accept Terms** — Agree to the Terms of Use and acknowledge the Privacy Policy.
3. **Consent** — Agree to receive communications from Pulse Labs.

After onboarding, you'll see the workspace selection screen where you can join an existing workspace or create a new one.

Enterprise SSO

Pulse Labs automatically integrates with your organization's Google or Microsoft SSO. Sign in with your corporate email through the Google or Microsoft option, and the platform will recognize your organization's domain for workspace discovery.

Roles and permissions

Pulse Labs uses a two-tiered permission system to control access at the Workspace level and at the project level. The workspace is the top-level container that represents a team or organization, similar to a shared drive. The projects are the “functional” folders within the workspace where the research happens.

Assign workspace roles

The platform automatically assigns the **Admin** role to the workspace creator.

Role	What You Can Do
Admin	Exercise full control: manage members, roles, and workspace settings. View and manage everything in the workspace.
Member	Create projects, invite new workspace members, and collaborate on projects they have access to. Cannot change workspace settings or billing.

Note: Typically, the workspace creator or the account owner holds the Admin role. To ensure coverage, you can appoint more than one Admin as backup.

Here are the permissions for **workspace** roles at a glance.

Permission	Admin	Member
Create projects	☑	☑
Invite new workspace members	☑	☑*
Remove workspace members	☑	✗
Change member roles	☑	✗
Edit workspace settings	☑	✗

View member list	☑	☑

Assign project roles

Pulse Labs automatically assigns the project creator as the Manager. You manage roles at the project level; for example, you can serve as Manager on one project while remaining a Viewer on another within the same workspace.

As a project Manager, you can:

- Invite others and assign them a role (Manager, Editor, or Viewer).
- Change any team member's role at any time.

Role	What You Can Do
Manager	Full control — In addition to all **Editor** permissions, can manage and promote team members, invite and communicate with participants in-platform, change project settings, and delete the project.
Editor	Active research — can create, modify, and run projects, review submissions, communicate with participants in-platform, and download data. Cannot manage workspace members or delete the project.
Viewer	Read-only — can view project data, watch recordings, read transcripts, and survey responses. Cannot modify anything or communicate with participants.

Editor is the recommended default for most team members. It gives enough access for day-to-day research work without exposing administrative controls.

Here are the permissions for **project** roles at a glance.

Permission	Manager	Editor	Viewer
View project content	☑	☑	☑
Create capture series	☑	☑	✗
Edit capture series	☑	☑	✗
Upload files/assets	☑	☑	✗

Approve/reject session data	☑	☑	✗
Annotate/highlight captured data	☑	☑	✗
Download data	☑	☑	✗
Edit project settings	☑	☑	✗
Manage project access (share)	☑	☑	✗
Communicate with participants in-platform	☑	☑	✗
Archive project	☑	✗	✗
Delete project	☑	✗	✗

Project visibility

Pulse Labs sets every new project to **Viewer** by default. If you would like to restrict general access to the Workspace, you can set the project to **Hidden.**

To grant access to others, open your project and select the **Share Project** icon to:

- **Find and invite** workspaFce members by name or email.
- **Assign** specific roles (Manager, Editor, Viewer) to each invitee.
- **Manage visibility** to determine if the project appears in the workspace directory for others to discover.

If you choose to keep all research private until you explicitly share it, you maintain control over who accesses your data and their level of permission.

Workspaces

What is a workspace?

A workspace is your team's shared home on Pulse Labs. It's where your projects live, where you invite collaborators, and where you control who has access to your research. It's the top-level container for everything your team does.

Most teams only need one workspace. Larger organizations might use separate workspaces for different departments, client engagements, or long-running research projects.

Creating a workspace

As creator of the workspace, you are automatically assigned as the Manager. When you create a workspace, you'll set three things:

- **Name** — A short, descriptive name for your team or organization
- **Privacy level** — Controls who can discover and join
- **Icon or avatar** — Easily identifies your workspace (optional)

Privacy levels

Level	Who Can Find It	How They Join
Open	Anyone with a matching email domain	Select **Join** to access workspace instantly.
Hidden	Nobody — invisible in directories	N/A. Only invited members can join.

Open works well for cross-functional teams where you want broad engagement. **Hidden** is for confidential work where even the existence of the workspace should be private.

As an admin, you can change the privacy level at any time.

Workspace identity

You can add an icon or avatar to your workspace for quick visual recognition in the sidebar and directory. This is optional but helpful when team members belong to multiple workspaces.

Navigating workspaces

After signing in, you'll see your workspaces organized into two groups:

- **Your Workspaces** — Workspaces you created or have joined/been invited to.
- **Company Workspaces** — Workspaces created by colleagues at your organization, with indicators showing whether you can join directly or need to request access.

Switch between workspaces at any time by selecting the workspace icon in the header.

Managing members

Workspace managers can:

- **Invite members** by email or from the organization directory.
- **View the member list** with roles and join dates.
- **Remove members** who no longer need access.

Workspace membership controls who can be added to projects. You can only invite someone to a project if they're already a workspace member (or you invite them to the workspace at the same time).

How workspaces relate to projects

- A workspace can contain one or multiple projects.
- Each project has its own team and permissions (Manager, Editor, Viewer).
- New projects are visible by default..
- Workspace settings (like the member list) are inherited by projects, but each project controls its own access independently.

When to create a new workspace

Create a separate workspace when you need:

- **Different teams** — A client services team and an internal research team that shouldn't see each other's work.
- **Different access boundaries** — One group that's open to the whole company and another that's invite-only.
- **Client separation** — Dedicated spaces for different clients with no cross-visibility.

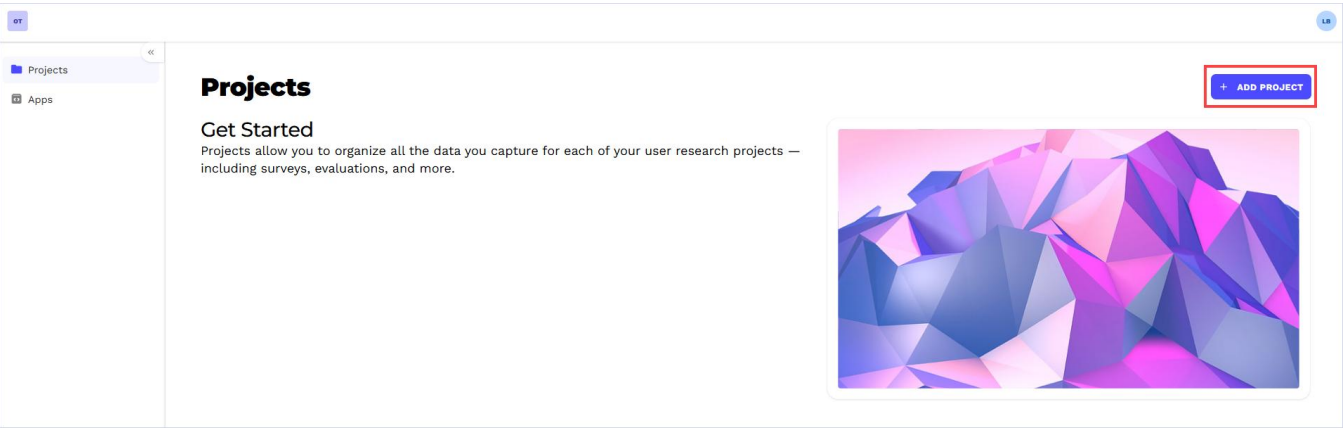
Projects

What is a project?

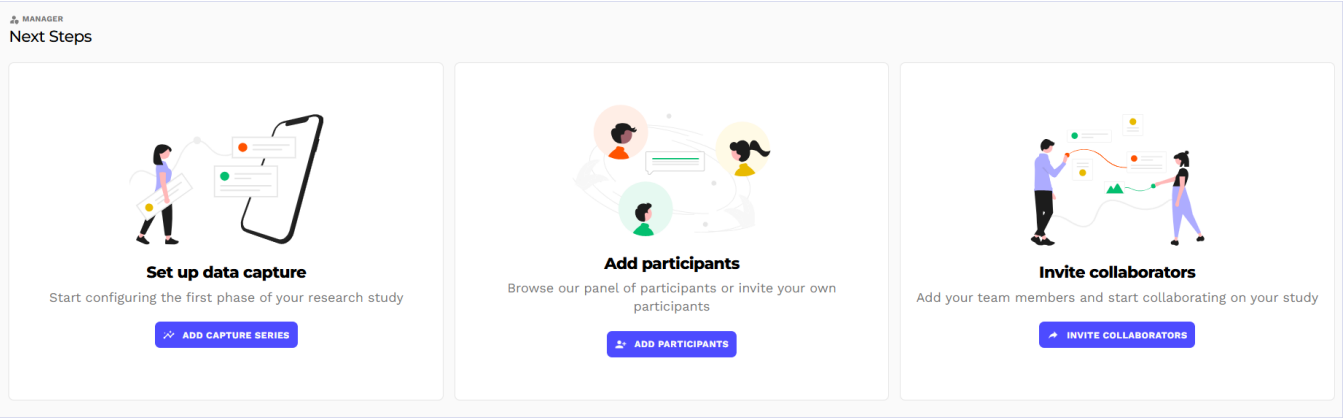
A project is a container for a single study. It holds your data capture methods (surveys and evaluations), your participant pool, and your research team. Everything related to a study lives inside one project.

Adding a project

After you create your workspace, you'll see the Projects screen. Select **Add Project**.



Enter the name of the project and a brief objective description, and select **Continue**. The Next Steps screen displays.



Note: When you add a project to your workspace for the first time, it starts in **Viewer** status—it's visible to all workspace members.

Project dashboard

The project dashboard is accessible only after you add participants and complete a marketing flow, or add a data capture to your project. After that, the project dashboard is what you'll see when signing in to the platform.

The dashboard has three main tabs.

Data tab

This tab is where your capture methods live. You'll see cards for each survey or evaluation you've added. From here you can:

- **See status at a glance** — Each card shows Draft, Active, or Completed status
- **Add a new capture method** — Select **Add Capture Series** and then choose Survey or Evaluation
- **Open an existing one** — Select a card to go to that method's dashboard.

If your project is empty, a **Next Steps** page guides you through setup.

Recruitment tab

Shows participants who have been invited to your project, with the number of participants and their current funnel status (recruited, verified, enrolled). From here you can:

- **Add participants** — Add manually by email, CSV upload, or from the Pulse Voices panel.
- **View participant status** — See where each person is in the verification process.
- **Manage invitations** — Resend invites or remove participants.

Enrolled tab

Shows participants who have completed all verification steps and are ready to participate. This is your active participant pool.

Add a capture method

To add a method, select **Add Capture Series**.

A single project can contain multiple capture methods of any type. Combinations of capture methods could include:

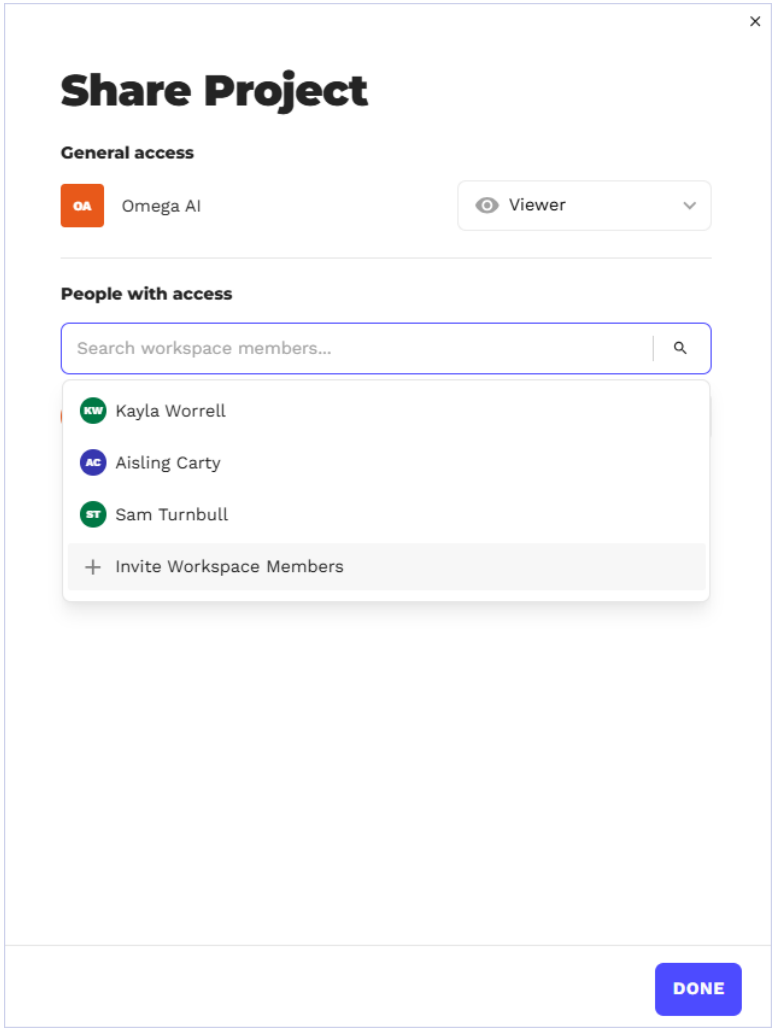
- **Screener survey +survey**— In the Verification steps, select screener survey and qualify participants for your study. Then send survey invitations to those who passed the screener.

- **Survey + Evaluation** — Collect self-reported preferences, then observe actual behavior.
- **Multiple evaluations** — Test different prototypes with the same participant pool.

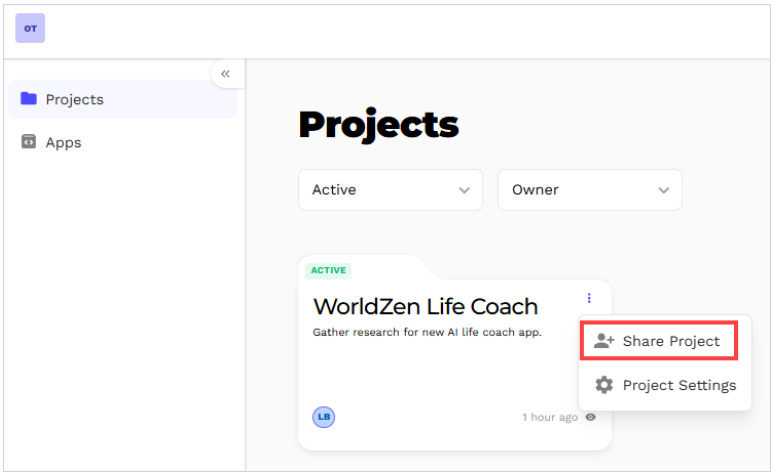
Method	Example
Survey	Quantitative feedback, user attitudes and preferences, running large-sample data
Evaluation	Unmoderated usability testing, longitudinal studies, task completion analysis, behavioral observation

Building your team

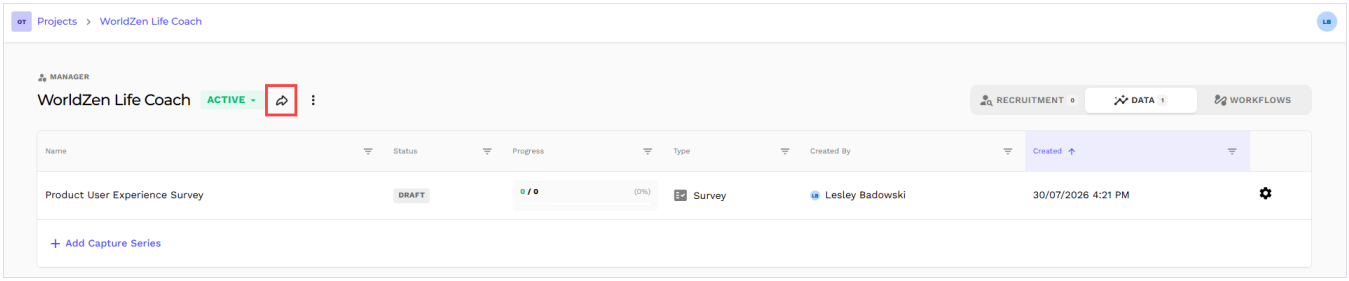
For an empty project, you can build your project team by selecting **Invite Collaborators** from the Next Steps screen. On the Share Project module, you can invite existing workspace members and/or invite new members to the workspace and project at the same time.



For an existing project on the dashboard, select **Share Project** from the more options menu.



From within your project folder, use the **Share Project** icon to invite members to collaborate on your project.



Use the search bar to select workspace members to add to your project. Assign a role (**Manager**, **Editor**, or **Viewer)** and then select **Done**. They'll receive an invitation and can access the project immediately.

You can add team members at any time.

Pulse Voices panel settings

If you're recruiting from the Pulse Voices panel, you can configure your project's settings to make your project discoverable by the entire panel:

- **Visibility** — Hidden (invite-only) or Open (discoverable).
- **Project image** — Upload your own, choose stock, or generate with AI.
- **Participant-facing description** — What potential participants see when browsing
- **Tags** — Help participants find your study by topic.
- **Timeline** — Show expected time commitment.

For additional information on marketing your study to our Pulse Voices panel, go to [*insert link*].

Project lifecycle

Status	Meaning
Active	At least one capture method is live and collecting data.
Archived	Study complete. Data is preserved but no new collection happens.

You can filter your projects list by status and sort by last modified date. Toggle between grid and list views using the view switcher.

Tips

- **One study, one project** — Don't mix unrelated studies. The shared participant pool only makes sense when everything is part of the same research.
- **Name clearly** — Use names your team will recognize months later. Include the study topic or client name.
- **Use Draft mode** — Review and test your setup before launching to participants.

Surveys

What are surveys in Pulse Labs?

Surveys are questionnaires that let you collect structured responses from participants asynchronously. You build a questionnaire, invite participants, and review responses as they come in. The underlying survey engine used by Pulse Labs gives you access to a full range of question types, conditional logic, and validation rules.

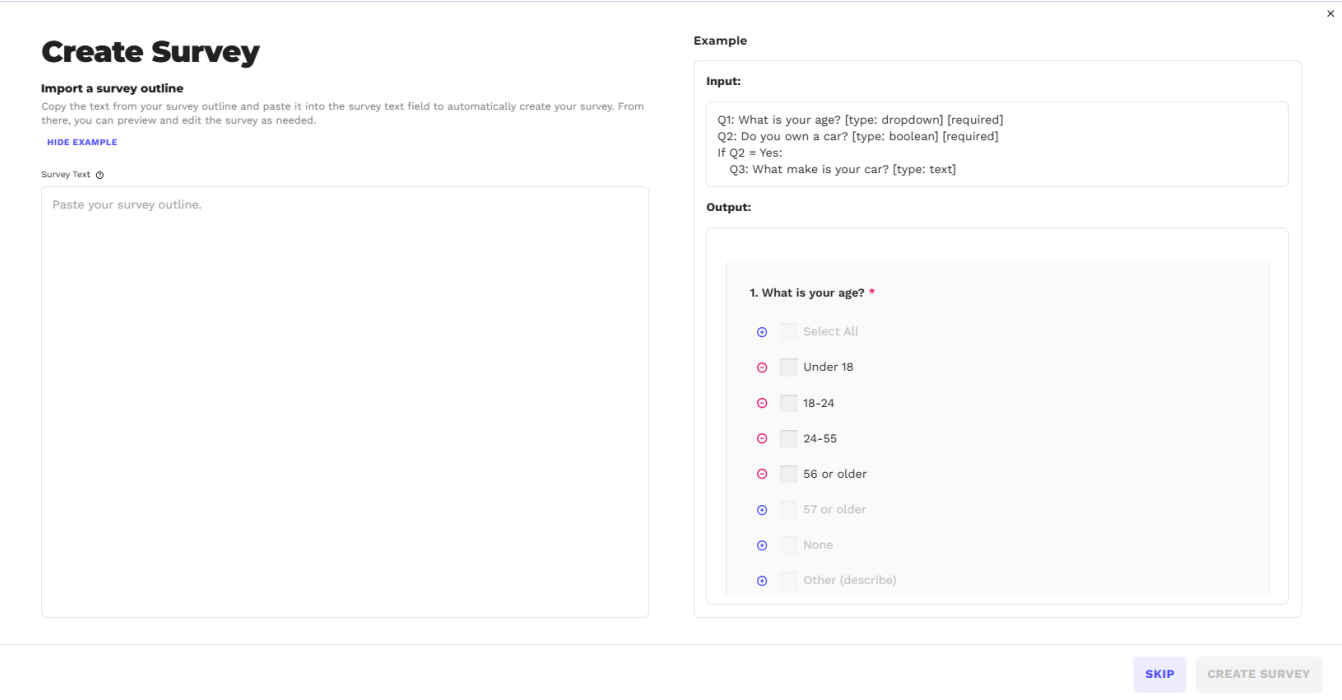
The standout feature is AI-assisted survey creation: describe what you want to ask in plain language or paste your survey draft or outline, and the platform generates a structured survey that you can then refine.

Creating a survey

On the Next Steps screen, select **Add Capture Series** and then select **Survey**. The creation flow has four steps.

Step 1: AI generation (optional)

You'll see a text input where you can describe your survey protocol or paste in your existing survey outline. If you've coded your survey in JSON, you can also paste the JSON code.



Examples of what you can paste in:

- A list of questions: "Do you own a car? If yes, what make? How satisfied are you?"
- A research brief: "I want to understand how people choose streaming services"
- Bullet points of topics to cover

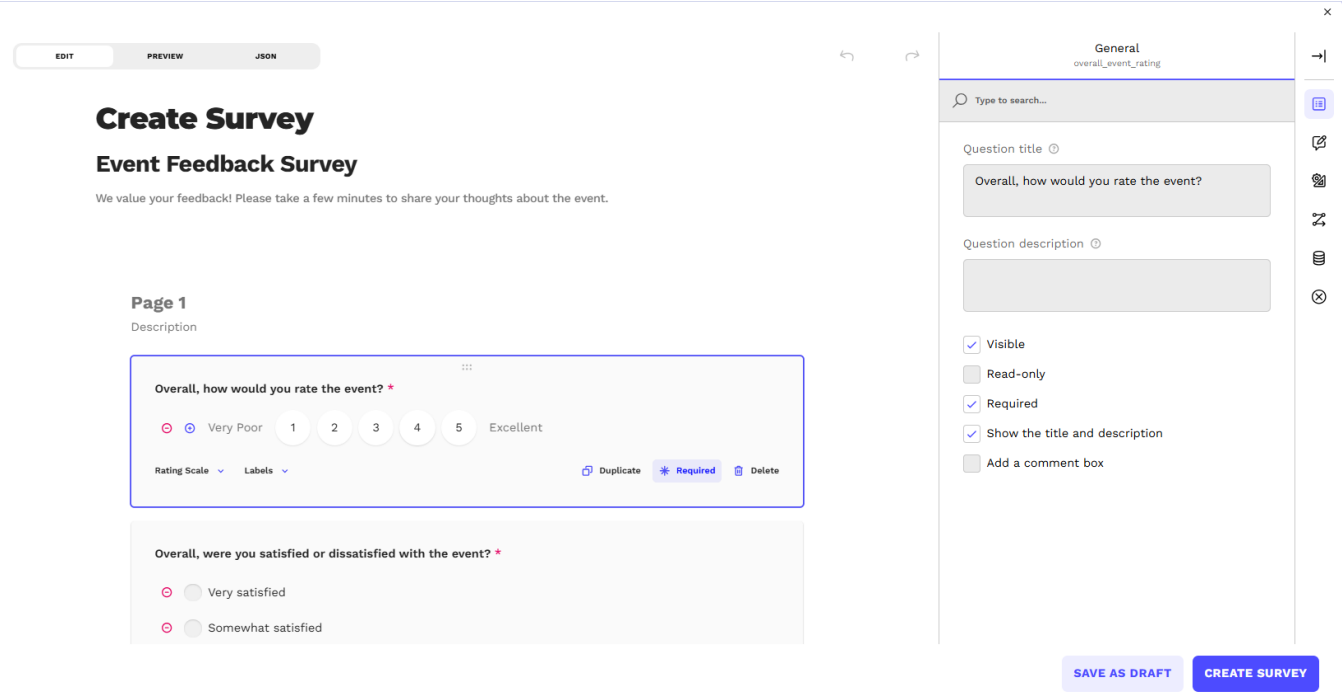
The AI generates a structured survey with appropriate question types and basic conditional logic. For example, if you ask about car ownership and then car make, the AI will set up branching so the make question only appears for car owners.

You can skip this step entirely and build manually.

Step 2: Survey builder

The survey builder is where you design, refine, and preview your survey. It has three tabs:

- **Edit** — Make changes to the survey as a whole or individual questions and their choice options
- **Preview** — View the survey as your participants will see it on a mobile device or browser
- **JSON** — View the survey's JSON code and edit as needed



Question types available

Type	Use Case
Long Text	Multi-lined open-ended responses
Single-Line Input	Short free-form response
Radio Button Group	One answer from a list
Rating/Scale	Scaled responses and format (1-5, stars, etc.)
Checkboxes	Multiple answers from a list
Dropdown	One answer from a long list (saves space)
Multi-Select Dropdown	Multiple answers from a long list (saves space)
File Upload	Collect files or screenshots from participants
Image Picker	Upload an image to support the question
Ranking	Drag-and-drop ordering of items
Single-Select Matrix	Same question applied to multiple items

Multi-Select Matrix	Same question applied to multiple items that have multiple answers

We also support signature, expression, HTML, and Yes/No (Bolean) question types, but those are less common.

Configuring questions

Select any question to open its properties in the side panel. Key settings include:

- **Required** — Whether the participant must answer before continuing
- **Description / Help Text** — Additional context shown below the question
- **Validation rules** — Set min/max values, maximum character limit, or use regex patterns to enforce custom formats (e.g., require an Employee ID field to match a specific pattern such as two letters followed by four numbers). For step-by-step instructions, see the SurveyJS Data Validation guide.
- **Visibility conditions** — Show this question only when a previous answer meets certain criteria
- **Choice randomization** — Randomize question order to reduce bias
- **"Other" and "None" options** — Add these with a toggle

Conditional logic

Conditional logic lets you create if-then rules that control survey flow:

- Show or hide questions based on previous answers
- Skip entire pages based on a response
- Set default values automatically
- Show informational content at specific points