

walk through UI Improvements for Live Edit-20260527_140145-Meeting Recording

27 May 2026, 01:01pm

17m 37s

● **Desmond Leo** started transcription

DL **Desmond Leo** 0:03

to share my screen.

But yes, I've got that.

Oh, it's a new link. Oh, I see. Okay.

FG **Fernando Guevara** 0:12

Yep, OK.

DL **Desmond Leo** 0:17

I'm going to share my screen and I'm going to walk you through some stuff. And hopefully, if I get stuff wrong, then Fernando will kind of correct me. So let's start with the challenges that you had with the live edit. The live edit, you got confused and got lost.

along the way in terms of understanding where to click and how to get back into studies and other studies. And then you were accidentally copying live links that shouldn't have been copied.

NP **Nathan Pereira** 0:42

Mhm.

Yeah.

DL **Desmond Leo** 0:47

And they, okay, so this is the process now. We wanted to resolve a bunch of things. Actually, it'd be a lot easier if...

You know, it would have been a lot easier actually if you could control. Can you control my, can you control my screen?

with your Teams account.

FG **Fernando Guevara** 1:13
If take control, yep.

NP **Nathan Pereira** 1:14
There was a tank control button.

DL **Desmond Leo** 1:17
Yeah, take control.
Are you willing to take control? You can just walk you through. You can just kind of click around and see how things work. Do you want to do that or do you want me to walk you through?

NP **Nathan Pereira** 1:22
The.
You talking to me?

DL **Desmond Leo** 1:30
Yeah.

NP **Nathan Pereira** 1:30
All right, let's see what happens.

DL **Desmond Leo** 1:34
I will give control.
Look at that. Cool. So you're working, so this is a live prototype from Claude. And what we want you to do is go through the experience of editing this live study, this fake live study, and just to get your thoughts.

FG **Fernando Guevara** 1:42
Yep.

NP **Nathan Pereira** 1:47
Uh-huh.

What?

Sorry.

DL **Desmond Leo** 2:06

So we've tried to make things a little bit more clear.

FG **Fernando Guevara** 2:08

Just one thing, maybe to have a better experience, we can minimize the clot sidebar on the top.

Yeah, that one. Yeah. Excellent.

DL **Desmond Leo** 2:20

Yeah, close the guy. Yeah, there you go.

So, one of the one of the things that we've we've wanted to like make clear is like there's always a bar at the top that's like, by the way, you're in edit mode, you're no longer in like this is like this is a draft, nothing is changing until you make until you make edits, so then if you if you go to the edit.

NP **Nathan Pereira** 2:32

Mhm.

Mhm.

DL **Desmond Leo** 2:42

The Advanced Survey Editor, and you click that.

This is now your survey. So you get to go through all of the different steps.

I think you can do like, don't go through those questions. It's not really a thing. We're just taking you through the back and forward process of changing things. So

NP **Nathan Pereira** 3:00

Mmh.

DL **Desmond Leo** 3:04

Where it says go back at the top, remember go back was in a really awkward spot and sometimes you'd click exit and it would just exit out. We've replaced that exit button now with go back. So you can only ever exit out of draft mode when you're at

this master level interface. So when you click edit mode now, that's where you go back to the main.

NP **Nathan Pereira** 3:10

Just like, yeah.

Yeah.

Cool.

DL **Desmond Leo** 3:24

the main study. And then you see this, right? You've got an unpublished draft. You can continue editing or you can discard. It was created by, in this case, Farrah Fawcett on 16th of March. So it kind of tells you when it was created. But if you go back to continue editing,

NP **Nathan Pereira** 3:37

Mhm.

DL **Desmond Leo** 3:45

And you go to the Launch tab.

If you scroll down to the links, you see that there is no more test link there. Sorry, there's no more live link there. We just have test links.

I don't think, I don't think that works, so you can't copy a link. We're not gonna, yeah.

NP **Nathan Pereira** 4:05

**** happened.

DL **Desmond Leo** 4:10

And...

What we've wanted to do, and we've changed the wording here, so we say relaunch with changes.

NP **Nathan Pereira** 4:16

Mhm.

DL **Desmond Leo** 4:18

So you're always aware, like you'll never get lost in understanding whether or not you're someplace different. The only thing that might not exist is this thing on the side that says edit mode, build quotas, audience, like.
that might not exist in terms of us telling you what was changed.

NP **Nathan Pereira** 4:37
Okay, sure, sure.

DL **Desmond Leo** 4:39
And.
Is there was there anything else, Fernando, that we designed that that is worth calling out from this experience?

FG **Fernando Guevara** 4:47
Bob.
About this carting drafts, I don't know if you have a confusion on that part.
Or is that clear?

NP **Nathan Pereira** 5:02
I think it's pretty self-explanatory as if. Yeah. I only ever discard it as if I need to go in when I've closed the study to reopen it, go into something, check something and then they'll, yeah, that, so that's kind of, it's very rare that I'd need to do actually anything with that apart from, yeah, just when I close the survey.

FG **Fernando Guevara** 5:03
Yeah, yeah, yep.
Mhm, mhm.

DL **Desmond Leo** 5:21
But if you want to create a new audience link, you come in here, you create the audience, you relaunch with changes, and then you get the live link from the, if you click exit edit mode.
You can scroll down here.
This is where, hey, where's the live link on this?
Fernando.

FG **Fernando Guevara** 5:43

Yeah, that one though, um, yeah, we we need to add it there, uh, yep.

NP **Nathan Pereira** 5:44

But.

DL **Desmond Leo** 5:47

So, that, that, that, that's a fault in the in the mock-up, but you're gonna have you're gonna have live links here, so you can always you'll always have quick access to your live links.

FG **Fernando Guevara** 5:50

Yeah, in the prototype, yep.

Yep.

NP **Nathan Pereira** 5:56

I...

I see, yeah, yeah.

DL **Desmond Leo** 5:57

to both testings and items.

Thoughts? Does that help clear up confusion in terms of?

NP **Nathan Pereira** 6:13

I think so, yeah. I think I think it being in one place.

Helps.

Because I've just learned just to use the overview links now anyway, but you know, it eliminates all of that anyways, that's fine.

DL **Desmond Leo** 6:26

Yeah.

FG **Fernando Guevara** 6:27

Mm.

DL **Desmond Leo** 6:31

Yeah.

And we've, and we've we've just made it really clear, like you're not in.

Like when you're in a live edit study versus when you're in like a live study, right? So that you know when you're working with a draft, you know when things haven't been published. And then if you, if they have, you know when you had created the draft, et cetera.

NP **Nathan Pereira** 6:41

Mm-hmm.

Mm.

FG **Fernando Guevara** 6:52

Yep.

If you continue, oh yeah, then we have the number of changes as well.

DL **Desmond Leo** 6:54

Bye.

Okay.

Yeah.

I.

Well, we will see. We'll see whether or not we can actually update with the number of changes, but...

That'll be, yeah, ideally, it'll just be a warning sign to be like, by the way, you do have pending changes. Are you sure you want to?

Are you sure you want to delete this draft?

NP **Nathan Pereira** 7:18

Yeah, what does it say? You delete nine changes across build quotas, audience and settings. I assume this is something you did, because obviously I didn't make any changes, right?

DL **Desmond Leo** 7:27

Yeah, yeah, this is something, yeah, this is this is just the experience for you to to to.

FG **Fernando Guevara** 7:28
Correct, yeah.

NP **Nathan Pereira** 7:29
The.
Yeah, fine. I just wanted to double check that I'm not messing with your stuff, so yeah.

DL **Desmond Leo** 7:32
Yeah.
Go, go, go to continue, continue editing, and then actually click launch, relaunch.

NP **Nathan Pereira** 7:45
Mm.

DL **Desmond Leo** 7:46
So, let's go to the launch page, and then I mean, this page seems to be clear, so...
So then we tell you when something is actually going to be launched.
to let you know that this is like a relaunched version of it.

NP **Nathan Pereira** 8:08
Cool.

DL **Desmond Leo** 8:16
And then when you scroll down, you get the live links again, which just aren't here in this mock-up.

NP **Nathan Pereira** 8:19
Yeah, sure, sure, sure.
Yeah, that's pretty straightforward.
Yeah, pretty straightforward.

DL **Desmond Leo** 8:49
Yeah.

Cool. I think that's it. That's all we wanted to cover with you. I guess there's probably stuff to other stuff that we can show you. We can show you merging rows and columns and cross tabs. I don't know, Fernando, if we have that artifact.

NP **Nathan Pereira** 8:52
Yeah.

DL **Desmond Leo** 9:07
Or if that was like a Figma.

FG **Fernando Guevara** 9:11
Yes, let me.
Take a look.

DL **Desmond Leo** 9:18
But assuming you've got no concerns with live edit and you think that that process works, we're going to go build that then. Yeah.

NP **Nathan Pereira** 9:22
I think so. Yeah, I think it makes sense.
I think it makes sense.

DL **Desmond Leo** 9:29
Cool.

NP **Nathan Pereira** 9:29
It just, yeah, stops.
It stops confusion, so yeah.

FG **Fernando Guevara** 9:33
The another thing that we improved, and if you can create another, yeah, edit study. Then enter edit mode. And if you go here, right, let's say you want to make a change in the question. So if you go to build section and then click edit. So one confusion is that we had

NP **Nathan Pereira** 9:53

Excuse me.

FG **Fernando Guevara** 10:01

Um...

the go back button here was not there. Yeah, we have another thing, right? So that also, I don't know why was not implemented in the first iteration.

DL **Desmond Leo** 10:07

Oh yeah, no, yeah, I'm working through, yeah.

FG **Fernando Guevara** 10:18

But it should be like this. Yeah, it's more clear.

DL **Desmond Leo** 10:19

But this is much more clear now, like this is kind of like an inner page of the actual study. So you go through study level details here, but when you're building, you go through like your building level stuff here, and then you get back out of build, and then you handle the other pieces. And then when you make an edit.

FG **Fernando Guevara** 10:25

Exactly.

DL **Desmond Leo** 10:39

If it is different from, if something is different from before, you get to see like, this is the thing that's been like, this has changed. Again, not entirely sure if that's possible, but we're gonna, we're gonna try and get that.

NP **Nathan Pereira** 10:44

Oh yeah, cool.

FG **Fernando Guevara** 10:47

Do you think?

Yeah. And that is a question. Do you think that that is valuable? Do you think that that is something that...

NP **Nathan Pereira** 10:54

I, I...

Yeah, I think it's a sense check, isn't it? It's I have made a change here. If so, even if it's an accident, it's kind of like, oh, I didn't mean to do that. You know what I mean? Or have I done this? Yes, it shows that it's been edited. I think it's a sense check. It's a, I think it's useful, definitely.

DL **Desmond Leo** 11:01

Yeah.

Yeah.

FG **Fernando Guevara** 11:13

Mmh.

DL **Desmond Leo** 11:15

Yeah.

FG **Fernando Guevara** 11:15

Okay.

NP **Nathan Pereira** 11:15

Yeah.

DL **Desmond Leo** 11:16

arah.

NP **Nathan Pereira** 11:17

The.

DL **Desmond Leo** 11:20

And cool. Okay. Excellent. So.

These we will take as approved. We're good. I mean, we've already built the crosstab

thing, so I don't know if it's worth showing you or if we just release it to you and so you can play with it.

FG **Fernando Guevara** 11:34
Oh.

NP **Nathan Pereira** 11:36
Either one, it doesn't matter to me. Or we can go through it if you want. If you want to go through it, we can go through it. If you're happy for me to play that, I can play that. It's entirely your call.

DL **Desmond Leo** 11:44
Do we do we have do we have an artifact to play with Fernando or?

FG **Fernando Guevara** 11:47
Yes, I'm looking right now and yes, just give me one sec. Rust ups, the roll ups we have, yeah.
Okay, give me one sec. Cherry.
Yeah.
Yes, yes, we have. Okay, sharing the...

DL **Desmond Leo** 12:10
Soon.

FG **Fernando Guevara** 12:13
Blink.
This one is a big make prototype.

DL **Desmond Leo** 12:22
Ohh, the Figma Make. OK, cool.

FG **Fernando Guevara** 12:23
Yeah, so give me one second. It's publishing again, so I will give you the link.

DL **Desmond Leo** 12:29

Thank you, look.

FG **Fernando Guevara** 12:30

so we can test it out.

Yeah, copy the clipboard, yes.

And Sherry.

Yeah.

DL **Desmond Leo** 12:48

All right, this is a report that you've got. You can, I think if you move your mouse, you can move, right? I think that means two of us can control things at the same time.

NP **Nathan Pereira** 13:00

Yeah.

DL **Desmond Leo** 13:00

Wow, that's cool. OK, yeah.

FG **Fernando Guevara** 13:01

Oh, that's nice.

NP **Nathan Pereira** 13:07

Yeah.

DL **Desmond Leo** 13:08

So now if you want to add a rollup, whether or not you're rolling up a column or a row, you can just add a rollup here.

Okay, and then you can pick, do you want to roll up a column or do you want to roll up a row? And if you want to roll up a column, let's say 18 to 24 and 25 to 34,

That doesn't work.

NP **Nathan Pereira** 13:29

Huh.

FG **Fernando Guevara** 13:32

Oh, the name, the name.

NP **Nathan Pereira** 13:32

But.

FG **Fernando Guevara** 13:34

You have to add a name. Yeah.

DL **Desmond Leo** 13:34

Oh, the name, right. Yeah, okay, fine. 18 to 34. We save that roll up. That roll up pops here.

NP **Nathan Pereira** 13:41

Oh, that's brilliant.

DL **Desmond Leo** 13:44

So now you can have it on the side. It comes out as blue. This thing for hide sources, it doesn't exist. So don't do that. There won't be a thing that hide it. You'll always see your roll up. It'll be tagged as a roll up. And then these other two columns will kind of be grayed out. If you want to add a roll up for rows and say, like, I want to add these guys and you're going to call this.

NP **Nathan Pereira** 13:51

Slide.

Uh-huh.

Yep.

DL **Desmond Leo** 14:06

Bottom 2 box or something like that.

NP **Nathan Pereira** 14:07

That's superb. That's a that's brilliant that is.

Yeah.

DL **Desmond Leo** 14:11

You can then have it rolls it up here and bottom two.

I mean, it didn't put it on the bottom, but that's, I think that's because, yeah.

NP **Nathan Pereira** 14:20

No, it's fine, but it's labeled, then it'll be labeled, won't it? So it's fine.

DL **Desmond Leo** 14:24

Yeah.

FG **Fernando Guevara** 14:24

Mhm.

NP **Nathan Pereira** 14:25

That's perfect. That's that's definitely useful to do.

DL **Desmond Leo** 14:29

Mm.

NP **Nathan Pereira** 14:29

Especially, yeah, because before I would have to have created a background variable for that. But I can just do it in real time now, so.

DL **Desmond Leo** 14:34

Yeah, so now, now it's just a lot, it's just a lot easier. I mean, you can still create a background variable because you still have that whole, like, you can rerun the hidden recode, like the hidden variable button, but this is just a little bit better for your crosstabs. And then there's a manage rollups thing here. So, you know, this is all the rollups that you can have and you can choose to delete them.

FG **Fernando Guevara** 14:35

Yep.

Correct.

NP **Nathan Pereira** 14:37

Yeah.

Yeah.

DL **Desmond Leo** 14:54

Or, edit them.

NP **Nathan Pereira** 14:57

Three.

DL **Desmond Leo** 15:01

So yeah, this works for you.

NP **Nathan Pereira** 15:03

Yes, that is brilliant. That's absolutely brilliant.

DL **Desmond Leo** 15:06

Excellent.

FG **Fernando Guevara** 15:07

Nice.

DL **Desmond Leo** 15:09

So cool, goal is to get them, the crosstab thing is actually almost ready.

So I'll see when we can. The goal is to have everything published by end of June, which is a little bit ambitious. If not, you'll see some of it come in. If you were like, I need.

NP **Nathan Pereira** 15:23

Okay.

Yep.

DL **Desmond Leo** 15:29

this thing first or something, let us know and we'll just try to see if we can push it up.

NP **Nathan Pereira** 15:33

Meet score summary tables. The mean score summary tables. That's what I would need. But yeah, we can talk about that.

FG **Fernando Guevara** 15:36

Ohh.

DL **Desmond Leo** 15:36

It beats what?

Yeah.

Actually, you know what? I was talking to Michelle about that one for the mean square summary tables and she was like, never use numerics.

That's just bad practice because people are just plopping the number that they randomly think. Always use a scale, which means you have a midpoint. If you're using a midpoint, then...

NP **Nathan Pereira** 16:02

Yeah.

DL **Desmond Leo** 16:08

it's actually easier for us. We don't have to design a new question type. You've got, you've got a, so I, so I can, I will look into how we can make that happen.

NP **Nathan Pereira** 16:12

Okay.

I think Ren agreed with Michelle. I just like the open numeric because it's an actual answer.

Because you're kind of reducing their answer in a scale, you're reducing their answer and then averaging it out. So you're sort of making it muddy twice.

DL **Desmond Leo** 16:32

But no one's gonna, but, but even, even, even if you ask yourself, you know, how much more would you pay for this, like...

In your head, it would never be so definitive as to be one number, right?

NP **Nathan Pereira** 16:43

Of course, it'll be, yeah, you'd have a range on pay between this and this. Yeah, maybe you're right. But then we're sort of making it a number anyway, right? For the sake of the me score. So, yeah. But yeah, I'm happy. I've got no problem with it being, you know, what's important is that we can do it, whether it's a scale or whether it's an open, it's

DL **Desmond Leo** 16:45

It'd be arranged, yeah.

Yeah.

Yeah.

But I will look.

NP **Nathan Pereira** 17:04

irrelevant. It doesn't concern me how or what it is. Because obviously if it's going to produce the table from a question, I will use that question. Do you know what I mean? So it's fine. Yeah.

DL **Desmond Leo** 17:06

Mmh.

Yeah, yeah. Cool. Awesome. All right, then, in that case, I think that's all we have to show and tell for you. This stuff is coming up, and I will look at the mean score stuff and get back to you on that.

FG **Fernando Guevara** 17:16

Mm.

NP **Nathan Pereira** 17:17

Great.

FG **Fernando Guevara** 17:24

Yep.

NP **Nathan Pereira** 17:26

But.

Brilliant. Nice one. Thank you very much. Nice to meet you, Fernando.

DL **Desmond Leo** 17:29

Cool.

Thank you.

FG **Fernando Guevara** 17:31

Like so.

Hey, nice to meet you too.

DL **Desmond Leo** 17:34

Talk to you later. Bye.

FG **Fernando Guevara** 17:35

Yeah, bye.

● **Desmond Leo** stopped transcription