



## Introduction

### Basic survey elements

A **survey** has three integral elements, each of which must exist:

- A survey name
- At least one group
- At least one question

### Survey name

The **survey name** provides the unique title to a **survey**. Within the same page, settings such as the welcome message on the opening screen, the description of the survey, and contact information for the survey administrator.

- Please note: The participant will see the survey title, welcome message and the description of the survey.

### Question Groups

A **survey** requires each question to be a member of a **group** (and only that **group**). Depending on the number of questions in the survey, **Groups** can be used to define logical sections, common subject themes, or possibly pages on the screen. A group can have questions about a similar subject or simply be setup as a manageable number of questions.

- A question **group** has a title and an optional description. You must have at least one **group** in each survey, even if you do not wish to divide the survey into multiple groups.

### Questions

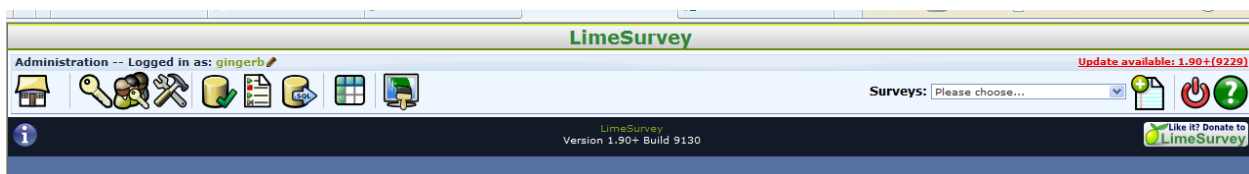
**Questions** are the core of your survey. There is no real limit to the number of **questions** you can have in your **survey** or in a **group**. **Questions** include the actual question text as well as settings that determine what form of answer you will accept. You can also specify a short 'help' explanation for each question and determine whether the question is mandatory (that is, must be answered) or optional.


## Basics of navigating the survey administrative interface


The LimeSurvey tool presents horizontal tool bars to the survey creator in their web browser. These toolbars are the header of a window allowing interaction. There is a tool bar for the survey software known as the Administrative Tool Bar, the Group tool bar, and the Question tool bar. Each tool bar controls its own functions. You will not use the question tool bar to make changes to the groups.


### Administrative Tool Bar

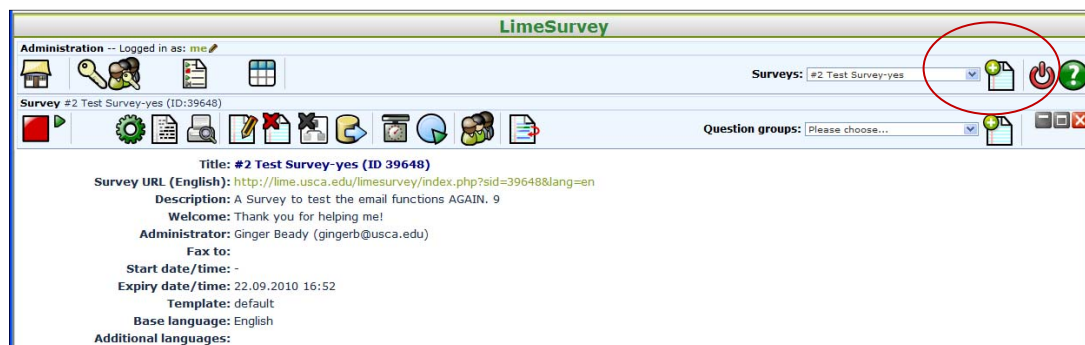
The top toolbar is usually the **Administrative Tool Bar** providing top level, global actions. One of the key items there is the drop down list of surveys along with a **Create New (Survey)** button; if available and enabled for your login account. Both are on the right side of the toolbar.




**Hint:** Want to know more about a particular icon button in a tool bar? Hover over the icon to see its name or click on the Help button  in the **Administrative Tool Bar** to see a description of icons in the currently active toolbar.

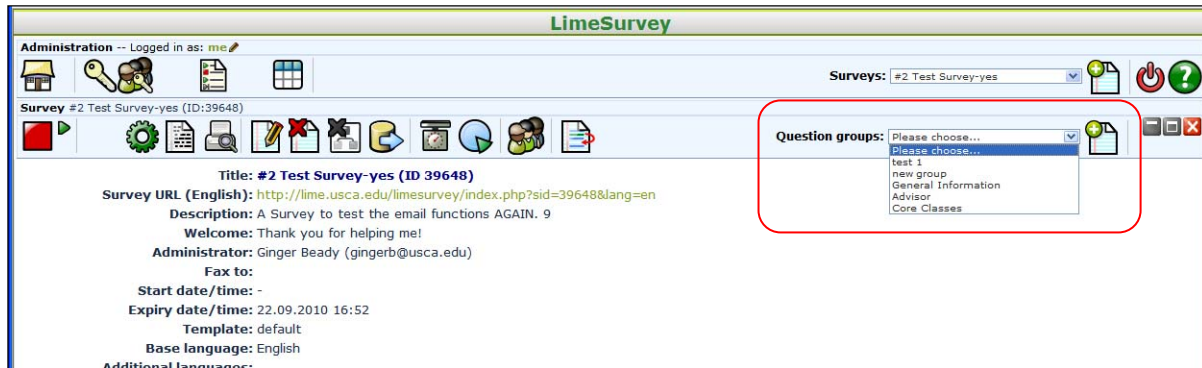
If the **Administrative Tool Bar** does not appear to be on top, click the home button  to get back to it.

By clicking the **Create New (Survey)** button  or selecting an existing survey, you minimize the Administrative window and open a new tool bar below to manage the **Survey**.




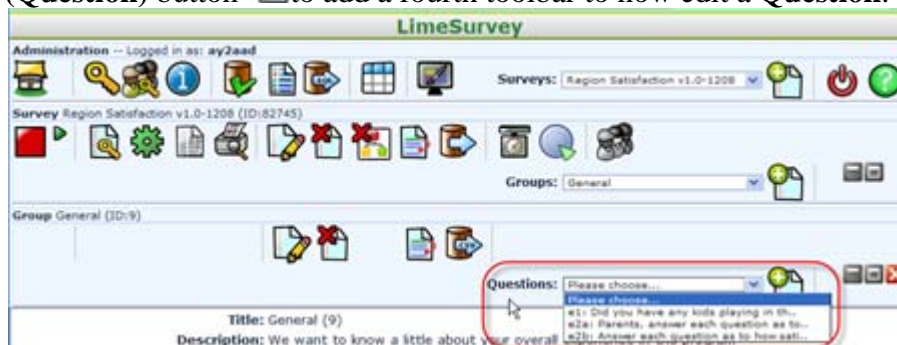
## Survey Tool Bar

Similar to before, one can click on the drop down list of question **Groups** or on the **Create New (Group)** button  on the **Survey** toolbar. Either selection will bring up the question **Group** toolbar below the **Survey** toolbar.








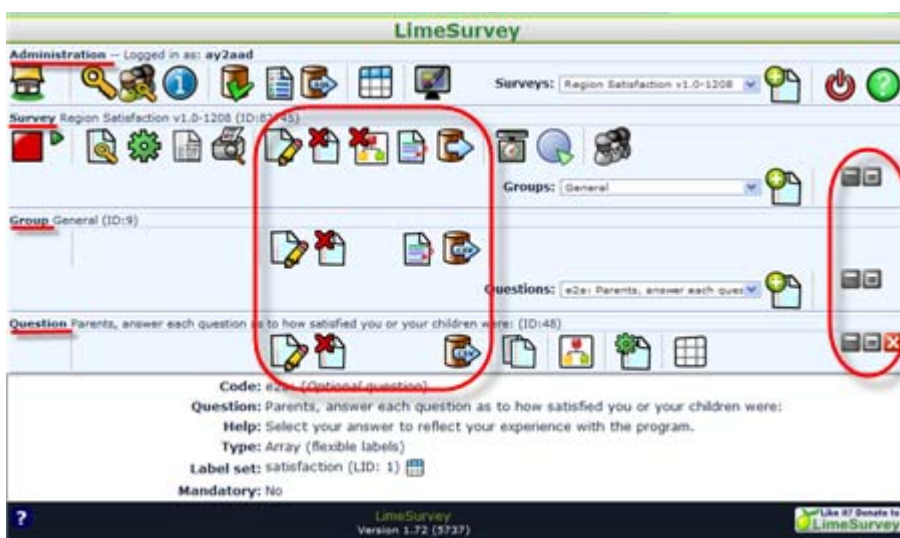
## Group Tool Bar


In the Question Group, you can click on the drop down list of **Questions** or click the **Create New (Question)** button  to add a fourth toolbar to now edit a **Question**.



## Common Buttons

In these nested toolbars are some common, navigational buttons. There is an **Edit** button  to edit the object you selected. By default, you will be put in the editor if you create the object. There is a **Delete** button  to delete the object. For **Groups** and **Questions**, there is a **Reorder** button  to change the order the object appears in during the survey execution. Finally, there is an **Export** button  to export a survey, question group or question that you can import back into another survey. Note that the **Create** button  also allows you to import a previously exported object.



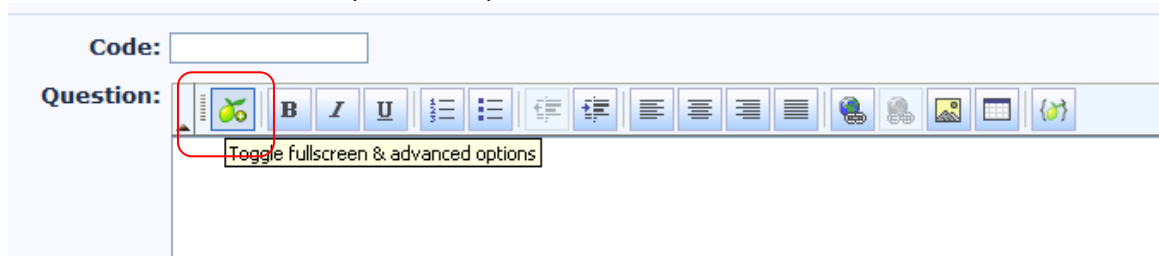
Finally, there are two to three small buttons to the far right  to minimize, maximize, and close the window of a toolbar. The maximize button will take you back to the summary window of the currently selected object.

The window of the current toolbar is automatically minimized when you select a lower level object to edit. Only the current toolbar and its window can be closed. You can open a previous toolbar and window by clicking on its maximize button. And you can jump around by selecting or creating a new object in another toolbar without having to close the currently open window first.

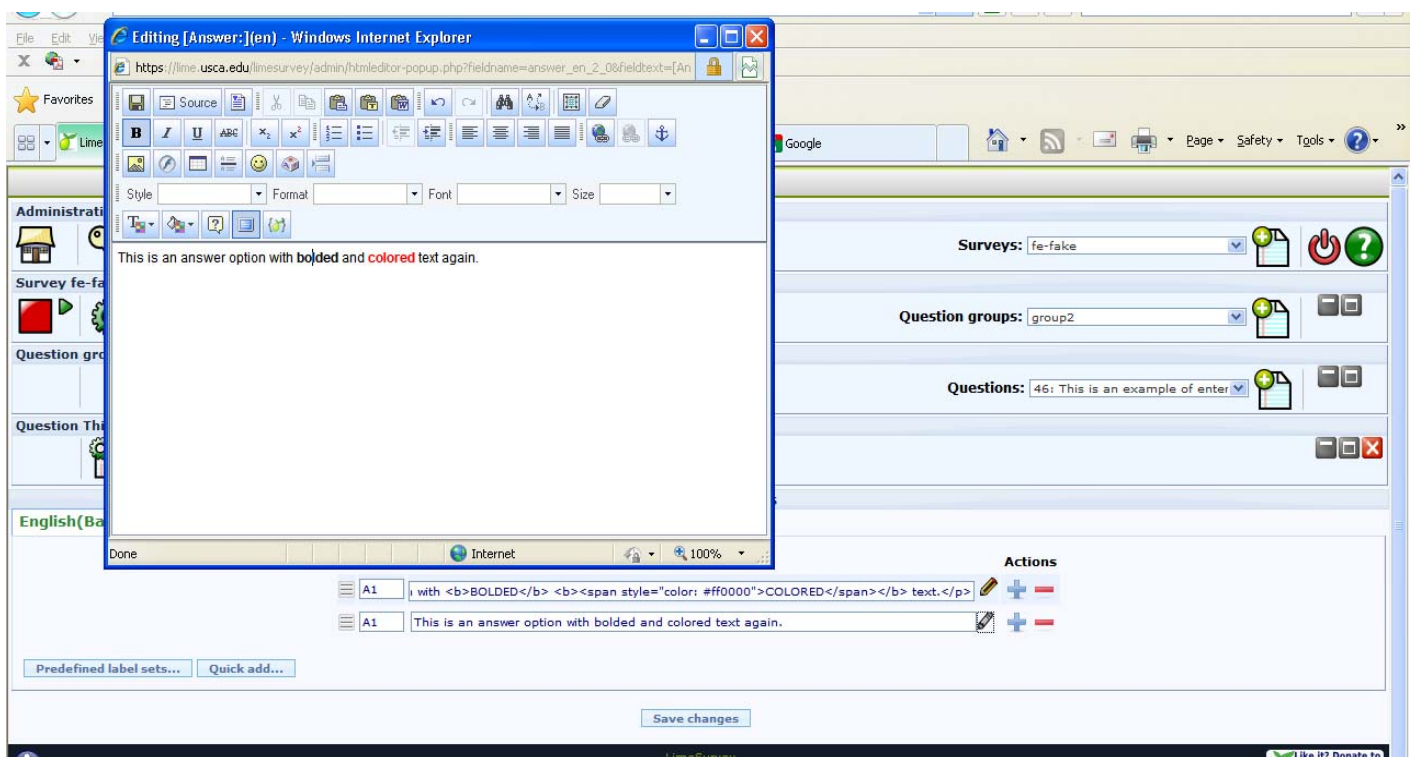
# HTML Editor

The HTML editor appears automatically for creating surveys, groups and questions. Which means you can type in the editor without seeing HTML code. Therefore, for many tasks completed in LimeSurvey, you will not be aware of or vary from what you see on the screen.



If you wish to use all of the features available that are not seen on the initial screen, you can select the lime icon on the far left of the menu bar (see below.)



However, when entering answer options and/or subquestion options, using the (popup) HTML Editor is necessary IF you wish to make modifications to your text, such as bolded. As seen below, the HTML Editor box will appear after selecting the pencil (edit) icon seen next to each answer option or subquestion. After you have entered your text as you want it to appear, click the save icon (picture of a disk). You will then be prompted with a message asking if you want to navigate away from this page. Select ok. HTML code will now be visible in your answer option text box after saving. Please note the participant will not see the coding.

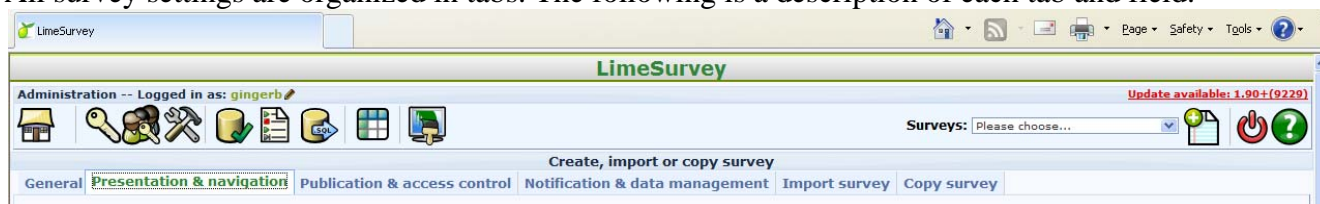


# Creating a New Survey – Overview

To create a new survey, click on the Add button  on the right side of the administration button bar and a "Create New Survey" screen will appear. You can edit most of these settings later again by click the 'Edit survey settings' icon  in the survey toolbar.

## 1st Step - Creation

All survey settings are organized in tabs. The following is a description of each tab and field.



## General Tab

1. **Base language:** We will only work with English at this time.
2. **Title:** This is the brief descriptive name of the survey. This title will be displayed on every page of the public survey.
3. **Description:** This allows you to enter a description of the survey. (i.e.: "A survey to find out the popularity of chocolate ice cream").
4. **Welcome:** This allows you to enter a message that will display when a participant first logs into your survey. (i.e.: "Thank you for taking the time to participate in this survey
5. **End Message:** This allows you to enter a message that will display when a participant completes your survey. (i.e.: "Thank you for completing our survey. We will publish results soon.").
6. **Administrator:** This is the name of the contact person who administers the survey. It will be included in emails sent out inviting participants to respond.
7. **Admin email:** This is the email address of the administrator (as above) and is used as the 'reply to:' address on any emails sent. You can also enter several email addresses separated with a semicolon - that way survey administrator notifications are sent to more than one person. (Example: "firstaddress@test.com;secondaddress@test.com")
8. **Bounce email:** This is the email address where a delivery error notification email should be sent.
9. **Fax to:** We do not use this feature at this time.

(You can incorporate HTML elements such as images in this section using the editor—AFTER the survey has been saved.)

## **Presentation & Navigation Tab**

1. **Format:** Choose from "One at a time", "Group at a time" or "All in one".
  - a. **Question by Question:** Public survey will display one question per page.
  - b. **Group by Group:** Public survey will display all questions in a group per page. Group at a time surveys still have a separate "welcome" page and "submit" page, like "One at a time" surveys.
  - c. **All in one:** Public survey will display all questions in one single page. Activated All in one surveys do not have a "welcome" page or "submit" page - the welcome message and submit button all appear on the same page.
2. **Public statistics:** Should never be set to "yes" for assessment related surveys. Only set to "yes" for polling-type surveys. If set to "Yes" users who have submitted the survey will be presented a link to statistics of the current survey.
3. **Show graphs in public statistics:** Determines if public statistics for this survey include graphs or only show a tabular overview
4. **List survey publicly:** This option defaults to no. When it is set to yes, your survey will be listed in the 'available surveys' portal
5. **End URL:** This URL will be presented as a link at the end of the survey, and allows you to direct your participants back to your home page (or, in fact, anywhere). The End URL has to be entered with "http://" at the beginning (e.g. <http://www.limesurvey.org>)
6. **URL description:** The description for the link using the End URL.
7. **Automatically load URL when survey complete:** If you choose "Yes" for this option, the script will automatically load the URL as set in "End URL" after completion of the survey, instead of displaying the usual "Completed" page. Do not use this if you are using assessments.
8. **Date format:** This format is used when survey participants answer a date question.



## **Publication & Access control Tab**

1. **Set token length to:** The default setting of 15 digits. (max. value- 99, minimum-5)
2. **Allow public registration:** normally set to: no. If you use tokens to control access to your survey, the only people who can use the survey are those who have an entry and a unique token from the token table. If you would like to use tokens, but also allow public registration, set this to "Yes". The "Yes" setting will allow a visitor to register his name and email address. The script will create a new entry in your tokens table for this person, then send them an invitation email. The script will ensure that only one person per email address can complete your survey.
3. **Start date:** Set this to some date if you want your survey to start on a certain date. The survey will start on midnight of that day and only then will people be able to answer to it. To disable this just clear the date from the input field.
4. **Expiry date:** Set this to some date if you want your survey to expire on a special date. This is the last date on which the public survey script will let people participate. (Example: If you set it for the 31st of December, then people will no longer be able to use the survey script on the 1st of January). To disable this just clear the date from the input field.
5. **Set cookie to prevent repeated participation?:** If you set this to 'Yes', and your survey does not use a tokens table to control participant access, then a cookie will be saved to the client computer of each survey participant once they have submitted a survey. This cookie will stop the same user on that computer from accessing the survey more than once. There are inherent limitations in the 'security' strength of such a system, but, in general, it allows you to retain some control over multiple entries on public surveys.
6. **Use CAPTCHA for:** With this option you can decide when you want a CAPTCHA to be used. Default is to enable CAPTCHA only for the public Registration page, but you can also enable it before accessing the survey, and before Load/Saving partial answers.
7. **Use HTML format for token emails?:** When set to yes, all emails sent by the token management interface (invite, reminder, confirmation) will be formatted as HTML. You'll then be able to use rich formatting for this emails. Default is Yes at survey creation. Caution, when you switch on/off this feature, you'll have to double check that your email templates are still displayed as you want.



## Notification & Data Management

1. **Admin Notification:** Options to allow the administrator to be emailed when each individual survey response is saved. You can choose from:
  - a. No email notification - Self-explanatory.
  - b. Basic email notification - An email is sent informing the administrator that a survey response has been saved.
  - c. Send email notification with response codes - Sends the full answers to the survey after saving.
2. **Email Responses To:** (*since 1.87+*) This allows you to send the survey responses to additional email addresses once the survey is submitted. Multiple entries or different methods can be used by separating the entries with a semicolon (;) - e.g. "yourname@test.com; [myname@test.com](#);hisname@test.com" OR when using multiple methods: "yourname@test.com;{INSERTANS:82733X12X73};{TOKEN:EMAIL}". There are three different methods for entering an address:
  - a. Enter a specific *email address* (i.e.: [yourname@test.com](#))
  - b. Enter a *SGQA code* and the response will be sent to an email address entered as an answer to that particular question (use the format {INSERTANS:9999X88X12}, in the same way you would [Re-use information from previous answers](#)
  - c. Enter a *Token code* (only possible if your survey is *not* anonymous) and the response will be sent to an email address retrieved from a token field (use the format {TOKEN:EMAIL} or {TOKEN:ATTRIBUTE\_1} in the same way you would [Re-use Information from the Tokens Table](#)
3. **Anonymous answers?:** This allows you to determine whether responses to your survey are matched up with information from your surveys tokens table, or kept 'anonymous'. The default is yes. If you choose "No" for anonymous, you must also have a tokens table for your survey when you activate it. **Attention:** If your survey is set to *anonymous* there is really no way to connect answers and participants. Even the admin can't link answers' data and users' data. However you will always be able to specifically view all answers entered by a certain anonymous individual participant in the survey. Thus individual, but anonymous, statistics is still possible to do.
4. **Date stamp?:** This field allows you to determine whether the survey will datestamp all responses. If you choose "Yes", then when a response is submitted, a field will be included in that response indicating the time and date that the response was made. (See configuration settings for \$timeadjust setting.)
5. **Save IP address?:** This field allows you to determine whether the survey will save an IP-address for all responses. If you choose "Yes", then when a response is submitted, a field will be included in that response indicating the ip-address of the participant.

6. **Save referring URL?:** This field allows you to determine whether the survey will save the referrer URL for all responses. If you choose "Yes", then when a response is submitted, a field will be included in that response where this URL is saved. A referrer URL is the URL from which the user was led to your survey URL.
7. **Enable token-based response persistence:** If your survey uses tokens and is not anonymous, then you may want to enable this feature. If you turn this on, then an auto-save is performed each time a participant answers a question, meaning that even if he hasn't submitted the survey and his browser crashes, he will find his survey answers still in place when returns to the survey. This can be used for designing pre-filled surveys as well (see data entry and importVV facility when not finalizing answers).
8. **Enable assessment mode?:** With this setting you can enable/disable [assessments](#) for this survey.

## Import Survey

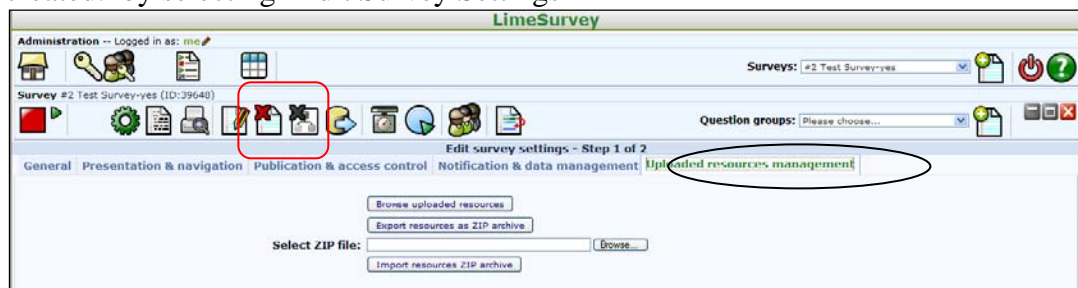
Alternatively you can [import a survey structure](#) from this tab. You have the option to let LimeSurvey automatically convert relative URLs to local images/media files and INSERTANS tags (recommended).

1. Click on the tab "Import Survey"
  - Click on the browse button to choose the SQL/CSV file, and then click on the button. The import process reads the following formats: v1.45 or later .CSV files created by LimeSurvey

## Uploaded Resources Management

This tab allows you manage files (pictures, media files) that were uploaded in the HTML Editor.

Please note: this tab does not appear when creating a new survey, it becomes available after the survey has been created: by selecting "Edit Survey Settings"



You can:

- Browse available files
- Export files as a ZIP archive
- Import a ZIP archive of files

Important hints:

- Authorized files extensions are defined in config-defaults.php.
- Files for the survey are in the upload/surveys/<sid> subdirectory.
- Uploaded files will only be seen while browsing resources on this survey (groups, questions, answers) not in other surveys or objects (labels).
- Do not expect this limited visibility to ensure confidentiality of the resources as they are reachable with a simple browser to anyone who knows the URL to the file.
- You can't import a ZIP file containing subdirectories.

## 2nd Step - Additional Languages

To add more language to a survey you have to create and save it - then edit it again. Now you can add and remove additional languages to the survey. If you remove a language from a survey the complete contents of that language in that survey is deleted permanently so be careful what you are doing.

By clicking on the button 'Save and continue' on the first page in the survey settings you will be taken to the language-specific page which lets you change all texts for each language like *Survey name*, *Welcome Text*, etc. You can also edit the date format which should be used for a certain language.

# Importing a Survey Structure

## Import using the administration interface:

***If*** you have previously exported a survey structure, you can import it from the "New Survey" screen.

2. Select "New Survey"
3. Click on the tab "Import Survey"
  - Click on the browse button to choose the SQL/CSV file, and then click on the button. The import process reads the following formats: v1.45 or later .CSV files created by LimeSurvey

## **Survey security settings**

From this screen you can add other users/groups who may have access to your survey. After adding a group/user you can assign the following special rights:

### **Edit survey properties**

- Edit Current Survey
- Set Assessment rules
- Initialize and Manage Tokens

### **Define questions**

- Add/Edit/Remove Groups
- Add/Edit/Remove Questions
- Add/Edit/Remove Answers
- Add/Remove Conditions
- Copy Question
- Preview Question

### **Browse responses**

- Browse Responses / View Statistics / Responses Management ( No Delete )
- View saved but not submitted responses
- View Tokens
- Data Entry

### **Export**

- Export Survey Structure
- Export Groups
- Export Questions
- Export Tokens
- Export Survey Results

### **Delete survey**

- Delete Survey
- Delete Responses

### **Activate Survey**

- Activate Survey
- Initialize and Manage Tokens