Information Technology Services

Quick Start Guide for LimeSurvey
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Login

- Navigate to: [https://survey.udmercy.edu/admin/](https://survey.udmercy.edu/admin/)
- Please use your **Office 365 (Detroit Mercy email) credentials** to log in.

Structure

- LimeSurveys are organized into three elements: **Surveys**, **Question Groups** and **Questions**. A **Survey** requires a unique name/time and allows the user to set specific settings for each individual survey. Every **Survey** must contain at least one **Question Group**. **Question Groups** allow users to group common survey **Questions** together. A **Question Group** must contain at least one **Question**. Users add **Questions** and answer options, when appropriate, to each **Question Group** contained in the **Survey**.
Create a New Survey

- To create a new survey, click on the **List surveys** button.

- Then, click on the **Create a new survey** button in the top left corner.
In the Text elements tab, there are only two required fields for creating a survey, Base Language and Title. (Note: Base Language allows you to have multi-lingual surveys, but does not translate the survey text for you.) The Description field is a brief description of your survey. It is used in the system-generated email sent to you and your survey participants, as well as the header across the top of your survey questions in some templates.
• Next you will see the **Welcome Message** field. This field will be the opening screen to your survey. You can use it to describe the purpose of your survey, general information being requested, etc.

Welcome message:

• The **End Message** field is used at the end of the survey. In this field, you can include a thank you message, instructions on how to close the browser window (if you are not using the **End URL**), etc.

End message:
• **End URL** will place a link on the **End Message** page for participants to click if you would like to refer them to a different website after completing the survey. Use the **URL Description** field to insert text to be linked, rather than just displaying the raw HTML link itself.

Create example question group and question?

End URL:

http://

URL description:

Date format:

dd.mm.yyyy

Decimal mark:

Dot (.)  Comma (,)

• In the **General settings** tab, your **Administrator** Name and **Email** information will be automatically entered by the system. Change the **Bounce Email** address to your email to receive notification on any email that is unable to be delivered. Next to **format**, you can choose **Question by question** (displaying one question per page), **Group by group** (displaying all question in a group per page), or **All in one** (displaying all questions in one single page).
• The **Presentation & navigation** tab allows you to adjust how the participant navigates through the survey and templates for the survey.

- **Navigation delay (seconds):**
  - 0
- **Show question index / allow jumping:**
  - Disabled
  - Incremental
  - Full
- **Show group name and/or group description:**
  - Show both
- **Show question number and/or code:**
  - Hide both
- **Show "No answer":**
  - On
- **Show "There are X questions in this survey":**
  - On
- **Show welcome screen:**
  - On
- **Allow backward navigation:**
  - Off
- **Show on-screen keyboard:**
  - Off
- **Show progress bar:**
  - On
- **Participants may print answers:**
  - Off
- **Public statistics:**
  - Off
- **Show graphs in public statistics:**
  - Off
- **Automatically load end URL when survey complete:**
  - Off
• **Publication & access control** tab is where you choose if the survey is listed on the public survey screen (not recommended for most surveys), dates available (for automatic activation and expiration/deactivation), etc.

• **If you only want your survey to be available to the participants you send the link to, make sure that List survey publicly is set to “No.”**

• A **CAPTCHA** is a type of challenge-response test used to determine whether the survey is being entered by a person or by a computer programmed to fill out the survey. You may choose to **Use CAPTCHA for survey access** if the survey will be open to the public.

• **Notification & data management** allows you to send notification emails and set saved information for each survey.
• In the **Participant settings** tab, **Tokens** are used to invite specific participants to take your survey. This screen allows you to control how the tokens are used. Tokens are not needed if you plan to send out one general survey link to a group of participants.

• The **Import** tab, located at the top of the **Create, import, or copy survey** screen, allows you to bring in past survey information in *.lss, *.lsa and *.txt formats. You can use **Import** to bring in an exported expired survey.
• The **Copy** tab, located at the top of the **Create, import, or copy survey** screen, allows you to copy a previous survey that is already in LimeSurvey for reuse. This is one method of recovering an expired survey, without exporting the survey first.

When done entering information click **Save** at the top of the screen (or **Import survey/Copy survey** as appropriate).
• If you ever need to return to these settings, you can find them under Settings in the left navigation bar (except for Import and Copy).
Adding Other Users to Your Survey

- To add a collaborator to your survey, go to **Survey permissions** in the left navigation menu. You do not need to do this for your survey participants, only collaborators.
- Use the dropdown menu to choose a user in the system and then click the **Add user** button.
- *Please note: If you are unable to find a user, please instruct the user to log into LimeSurvey to automatically create an account.*

- Once added, you will need to **Set survey permissions** for that user by clicking the button.
• Choose whatever permissions are appropriate.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permission to create/view/update/delete assessments rules for a survey</td>
<td>Assessments</td>
</tr>
<tr>
<td>Permission to view &amp; update the translations using the quick-translation feature</td>
<td>Quick translation</td>
</tr>
<tr>
<td>Permission to view/update/delete quota rules for a survey</td>
<td>Quotas</td>
</tr>
<tr>
<td>Permission to create/data entry/view/update/delete/import/export responses</td>
<td>Responses</td>
</tr>
<tr>
<td>Permission to view statistics</td>
<td>Statistics</td>
</tr>
<tr>
<td>Permission to activate/deactivate a survey</td>
<td>Survey activation</td>
</tr>
<tr>
<td>Permission to create/view/update/delete/import/export the questions, groups, answers &amp; conditions of a survey</td>
<td>Survey content</td>
</tr>
<tr>
<td>Permission to delete a survey</td>
<td>Survey deletion</td>
</tr>
<tr>
<td>Permission to modify survey security settings</td>
<td>Survey security</td>
</tr>
<tr>
<td>Permission to view/update the survey settings including survey participants table creation</td>
<td>Survey settings</td>
</tr>
<tr>
<td>Permission to view/update the survey text elements, e.g. survey title, survey description, welcome and end message</td>
<td>Survey text elements</td>
</tr>
<tr>
<td>Permission to create/update/delete/import/export token entries</td>
<td>Tokens</td>
</tr>
</tbody>
</table>

**Question Groups**

• Every survey must contain at least one **Question Group**. To add a new question group, click on the **Structure** tab and **Add question group** button.
• For new groups, enter the Title (required) and any other information you would like to add. Then, click on the Save button.

• If you have exported a question group from a previous survey, click the Import a group button, locate the file, and click Import.
Question Types

- To add a new question to your Question group, click the Add question button.
Enter the **Code** for the question. This can be a number, combination of characters and number, or text. Next, enter the **Question** text.

Enter any **Help** text that you would like to include for the question. The **Help Text** is visible to survey participants.

**Code:**

```
q01
```

**Required**

**Question:**

```
What is your primary status at the University?
```

**Help:**

```
```
• Choose the **Question Type** from the menu.
• If needed, you can change the **Question Group** in the next menu.
• For **Mandatory**, choose whether the question requires an answer to proceed.
• **Relevance Equation** and **Validation** can be left as entered by the system (the system will update them later if you add conditions to your question).
• The **Position** dropdown menu will allow you to add the question to the beginning or the end. This option is only visible during the new question entry. You can reorder questions and groups after they have been entered.
• Select the question type. An example of that question type will be displayed.

Select question type

<table>
<thead>
<tr>
<th>Single choice questions</th>
<th>Preview question type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>List (radio)</td>
</tr>
<tr>
<td>5 point choice</td>
<td></td>
</tr>
<tr>
<td>List (dropdown)</td>
<td></td>
</tr>
<tr>
<td>List (radio)</td>
<td>Choose one of the following answers</td>
</tr>
<tr>
<td>List with comment</td>
<td></td>
</tr>
<tr>
<td>Arrays</td>
<td></td>
</tr>
<tr>
<td>Mask questions</td>
<td></td>
</tr>
<tr>
<td>Text questions</td>
<td></td>
</tr>
<tr>
<td>Multiple choice questions</td>
<td></td>
</tr>
</tbody>
</table>

• When done, click the Select button and Save.
- For questions that require choice options, like multiple choice or a dropdown list, you will add answer choices by clicking the **Edit answer options** button.

  ![Edit answer options button](image)

  **Question summary**

  **Question group:** Main (ID: 4272)  
  **Code:** q01 : (Optional question)  
  **Question:** What is your primary status at the University?  
  **Help:**  
  **Type:** List (radio)  
  **Mandatory:** No  
  **Relevance equation:** 1

  **Question quick actions**

  ![Add new question to group](image)

  - Enter the **Subquestion/Answer** text, and then click the plus sign to add more. If you want to remove an unintended answer, click the trash can to delete it. Click the **Save** button when done.

  ![Edit answer options](image)

  **Edit answer options**

<table>
<thead>
<tr>
<th>Position</th>
<th>Code</th>
<th>Answer options</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1</td>
<td></td>
<td>Student</td>
<td><img src="image" alt="Edit" /> <img src="image" alt="Save" /></td>
</tr>
<tr>
<td>A2</td>
<td></td>
<td>Faculty</td>
<td><img src="image" alt="Edit" /> <img src="image" alt="Save" /></td>
</tr>
<tr>
<td>A3</td>
<td></td>
<td>Staff/Administrator</td>
<td><img src="image" alt="Edit" /> <img src="image" alt="Save" /></td>
</tr>
</tbody>
</table>
• Branching logic can be added by clicking the **Set conditions** button.
• *Please note:* **Question branching needs to be added to the question that will only be visible by some survey takers.**
All earlier questions will be displayed. Select an earlier question and answer(s) that should allow the survey taker to see the current question. Then click **Add condition**.
• You can quickly view the survey, by clicking on the **Preview survey** button.

• If you need to rearrange your question groups or questions, drag the question/group with your mouse to the desired position.
Quotas

- You may choose to terminate a survey if the survey does not meet the criteria for the survey. This feature is often used for Informed Consent.
- First, create the question that could restrict access to the survey.

Add a new question

**Code:**
q00

**Question:**
Do you consent to participate in this survey?

**General options**

**Question type:** List (radio)

**Question theme:**
Default

**Preview:**
List (Radio)
- Choose one of the following answers
  - Burgers
  - Pizza
  - Pasta
  - Other:
  - No answer

**Question group:**
Main (ID: 4272)

**Option 'Other':**
Off

**Mandatory:**
On
• Move the question so that it is the first question in your survey.

![Image of survey structure showing questions]

• Under **Settings** select **Quotas**.

![Image of survey settings with Quotas highlighted]

• Click on **Add new quota**.
- Enter a **Quota name** and set the **Quota limit** (0 to not allow any). Check to make sure that the **Quota action** is set to “Terminate survey.” Enter a message that the participant will see in the **Quota message**. You may also enter a link of the person to visit in the **URL field** and **URL description** to be linked. When done, click the **Save button**.

### New quota

<table>
<thead>
<tr>
<th>Quota name *</th>
<th>English (Base language)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informed Consent</td>
<td></td>
</tr>
<tr>
<td><strong>Limit</strong> *</td>
<td>You do not meet the criteria for Informed Consent.</td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td><strong>Quota action</strong> *</td>
<td>URL:</td>
</tr>
<tr>
<td>Terminate survey</td>
<td></td>
</tr>
</tbody>
</table>

- Next, click the **Add answer button**.

### Survey quotas

<table>
<thead>
<tr>
<th>Quota members</th>
<th>Completed</th>
<th>Limit</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Informed Consent</td>
<td>0</td>
<td>0</td>
<td>Terminate survey</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Add answer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

No answers have been set for this quota.
• Choose the question in the **Select question** list and click the **Next** button.

**New answer for quota 'Informed Consent'**

**Select question:**

![Select question interface](image)

• Choose the answer from the **Select Answer List** and click the **Next** button. The survey will only terminate if this answer is selected.

**New answer for quota 'Informed Consent'**

**Select answer:**

![Select answer interface](image)
Publishing your Survey

- When you are ready to launch your survey, you may perform the following steps. It is recommended that you do this if, and ONLY IF, you are ready to launch your survey. While you can practice activating/deactivating your survey during the testing phase, once your survey is truly active, you will not be able to edit the survey. If you need to change a question while the survey is active, you will have to deactivate or expire the survey. **Deactivation will delete results already collected and expiring the survey will require you to create a new survey and reimport the questions.** Make sure your survey is ready to go, to avoid these issues!

- As you build your survey, you can easily test the entire survey by clicking on the **Preview Survey** button.

- When you are satisfied with your survey and ready to publish, click the **Activate this survey** button on the survey toolbar.
• You will have one last chance to change how your survey is presented. Review the settings on this page and click the **Save and activate survey** button if you are ready to launch your survey.

**Warning:** Please read this carefully before proceeding!

You should only activate a survey when you are absolutely certain that your survey setup is finished and will not need changing.

Once a survey is activated you can no longer:

- Add or delete groups
- Add or delete questions
- Add or delete subquestions or change their codes

**Additionally the following settings cannot be changed when the survey is active.**

Please check these settings now:

- Anonymized responses? Yes/No: No
- Date stamp? Yes/No: No
- Save IP address? Yes/No: No
- Save referrer URL? Yes/No: No
- Save timings? Yes/No: No

Please note that once responses have collected with this survey and you want to add or remove groups/questions or change one of the settings above, you will need to deactivate this survey, which will move all data that has already been entered into a separate archived table.
• If you have selected an open survey, LimeSurvey will ask you if you would like to change to Closed-Access Mode and use Tokens instead. If you do not wish to use tokens, click **No, thanks**.

**Activate survey (477688)**

Survey has been activated. Results table has been successfully created.

This survey is now active, and responses can be recorded.

**Open-access mode:** No invitation code is needed to complete the survey. You can switch to the closed-access mode by initialising a survey participants table by using the button below.

- Click **Switch to closed-access mode** or **No, thanks**.

• Congratulations, your survey is now live! You will see the link to your survey on this screen, along with a summary of your survey information.
Survey Participants

- The **Survey participants** button allows you to invite a group of people to participate in your survey, keep track of who has completed the survey, and ensure that each person can only participate once.
- You may activate tokens by clicking on **Switch to closed-access mode** button after activation OR you can click on the **Survey participants** button before the survey is activated.

- Click the **Initialize participant table** button.

**Survey participants have not been initialised for this survey.**

If you initialise a survey participants table for this survey then this survey will only be accessible to users who provide a token either manually or by URL.

Do you want to create a survey participant table for this survey?

- Initialise participant table
- No, thanks.

- Click to **Continue**.

**Survey participants**

A participant table has been created for this survey. ("lime_tokens_477688")

- Continue
• To import a list, create spreadsheet in Excel with the columns **firstname**, **lastname**, and **email**.

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>firstname</strong></td>
<td><strong>lastname</strong></td>
<td><strong>email</strong></td>
</tr>
<tr>
<td>2</td>
<td>John</td>
<td>Doe</td>
<td><a href="mailto:doejo@udmercy.edu">doejo@udmercy.edu</a></td>
</tr>
<tr>
<td>3</td>
<td>Jane</td>
<td>Doe</td>
<td><a href="mailto:doeja@udmercy.edu">doeja@udmercy.edu</a></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

• **Save As** a **CSV (Comma delimited) (*.csv)** file.

• **Click Yes** to acknowledge that some formatting features are not compatible with CSV files.
• In LimeSurvey, click the **Create** button and choose **CSV file** from the dropdown list.

![Image of the Create button and CSV file selection]

• Click on **Choose File** and locate your CSV file. Then, click on **Upload**.

![Image of the Choose File and Upload options]
• A confirmation message is displayed. Click **Browse participants**.

**Uploaded CSV file successfully**

**Successfully created token entries**

2 records in CSV  
2 records met minimum requirements  
2 records imported

[Browse participants]

• Click the **Generate tokens** button to add a token to each contact.

• Click **Yes** to confirm and **Ok**.

**Create tokens**

Clicking ‘Yes’ will generate tokens for all those in this token list that have not been issued one.  
Continue?

[Yes]  [No]

• Click the **Invitations & reminders** button and select **Edit email templates** to draft an Invitation, Reminder, Confirmation, Registration, Basic Admin Notification, and/or Detailed Admin Notification email.
• Make any desired edits to each template on the tabs above. Please note: the text with {curly brackets} will automatically be filled in for each participant in the survey. When finished, click **Save and close**.

Invitation email subject:
Invitation to participate in a survey

Invitation email body:

Dear {FIRSTNAME},
you have been invited to participate in a survey.

The survey is titled: "{(SURVEYNAME)}"
"{(SURVEYDESCRIPTION)}"

To participate, please click on the link below.

Actions:
Validate expressions  Reset this template

Invitation attachments:
Add file

• To send your invitation email, click the **Survey participants** button. Then, click on the **Invitations & reminders** button and **Send email invitation**.

• To send your email reminder, click on the **Invitations & reminders** button and **Send email reminder**.
A confirmation message will be displayed.

Sending invitations...

Invitation sent to: 1: John Doe (doejo@udmercy.edu)
Invitation sent to: 2: Jane Doe (doej@udmercy.edu)
All emails were sent.

Expiring or Deactivating Your Survey
- There are two options for deactivating your survey. **Deactivate** will delete **ALL** results recorded in the survey. Be sure to export your data before clicking this option! **Expire** the survey will make sure that participants cannot enter any more data, and allow you to review and export your data on the server. But, if you need to re-run your expired survey, you will need to export the survey and import it into a new survey or use the **Copy** tab when you create a new survey.

- Click on the **Stop this survey** button to stop your survey.
Then, click on the **Expiration survey** or **Deactivate survey** button.

Stop this survey(477688)

**Warning:** Please read this carefully before proceeding!

There are two ways to stop a survey. Please read carefully about the two options below and choose the right one for you.

**Expiration**

- No responses are lost.
- No participant information lost.
- Ability to change questions, groups and parameters is still limited.
- An expired survey is not accessible to participants (they only see a message that the survey has expired).
- It's still possible to perform statistics on responses using LimeSurvey.

**Deactivation**

- All responses are not accessible anymore with LimeSurvey. Your response table will be renamed to: lime_old_477688_20210520132757
- All participant information is lost.
- A deactivated survey is not accessible to participants (only a message appears that they are not permitted to see this survey).
- All questions, groups and parameters are editable again.
- You should export your responses before deactivating.

Accessing Survey Results

- On the survey toolbar, click on **Responses** and **Responses & statistics**.

    ![Survey toolbar with Responses and Responses & statistics highlighted](image)

- To view survey statistics, click on the **Statistics** button.

    ![Survey statistics highlighted](image)
• Select all questions and click the **View statistics** button.

For More Information...

• Please see the Limesurvey Online Manuel: [http://manual.limesurvey.org](http://manual.limesurvey.org)