Information Technology Services

Quick Start Guide for LimeSurvey
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Login

- Navigate to: [https://surveys.udmercy.edu/limesurvey/admin/](https://surveys.udmercy.edu/limesurvey/admin/)
- Please use your Titan Pass 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.

![Create a new survey button](image)

**Survey list**

• 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.

![Survey creation fields](image)

*This setting cannot be changed later!
• 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.

• 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 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. 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).
• Click on the **Presentation & navigation** section, just below General options. **Presentation & navigation** allows you to adjust how the participant navigates through the survey and templates for the survey.
• **Publication and Access Control** 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.

• *When you expire a survey, you will not be able to reactive it. You will have to export your survey and reimport it as a new survey.*
- **Notification & Data Management** allows you to send notification emails, and set saved information for each survey.
• **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.

![Tokens](image)

- 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.

![Create, import, or copy survey](image)
• 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.

![Image of Copy tab](image)

• 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 **Survey Properties** and **General Settings** (except for **Import** and **Copy**).
Adding Other Users to Your Survey

- After the other user has logged onto LimeSurvey, go to the Survey properties button and Survey permissions. You do not need to do this for your survey participants, only collaborators.

- Use the drop down menus to choose users in the system and then click Add user button.

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

**Question Groups**

- Every survey must contain at least one **Question Group**. To add a new group, click on the **Add new group** button.

Survey quick actions

**Warning!** Before you can add questions you must add a question group first.
- 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 List questions in the left menu. Then, click the Add new 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.
• 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.
• A list of all the question types is shown below. When you hover over an option, a sample displays to the side of the menu.

• When done, click the Save button.
• For questions that require choice options, like Multiple Choice or Drop Down List, you will add answer choices by clicking the **Edit answer options** button.

• 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.
• Branching logic can be added by clicking the **Set conditions** button.
• You can quickly view the survey, question group, or question by clicking on the **Preview survey**, **Preview question group**, or **Preview question** buttons.
• If you need to rearrange your question groups or questions, click on the **Question organizer** button in the left menu. To reorder questions/question groups, drag the question/group with your mouse to the desired position. Click on **Save** to save your changes.

![Image of LimeSurvey interface](image)

**Quotas**

• You may choose to terminate a survey if the survey does not meet the criteria for the survey.
• Go to **Survey properties** and **Quotas**.

![Image of Quotas section in LimeSurvey](image)

• 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.

- Next, click the **Add answer** button.
• Choose the question in the **Select question** list and click the **Next** button.

**New answer for quota 'consent'**

Select question:

- Q01: What is your current status?
- Q02: How many credit hours are you taking?
- Q03: Do you consent to the terms of this agreement?

[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 "consent"**

Select answer:

- Yes
- No

[Image]

Save this, then create another: [ ]
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.** This will also change the link to your survey. **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?**
  - No

- **Date stamp?**
  - No

- **Save IP address?**
  - No

- **Save referrer URL?**
  - No

- **Save timings?**
  - 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.

[Save & activate survey] [Cancel]
- 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 (ID: 228999)**

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 token table with the button below.

[Switch to closed-access mode] [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 allow 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 the 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 participant 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.
• To import a list, create spreadsheet in Excel with the columns firstname, lastname, and email.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>firstname</td>
<td>lastname</td>
<td>email</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>
</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.

• Click on **Choose File** and locate your CSV file. Then, click on **Upload**.
• A confirmation message is displayed.

![Uploaded CSV file successfully](image)

- 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.

![Generate tokens button highlighted](image)

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

![Create tokens dialog](image)

• 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.

![Invitations & reminders button and Edit email templates highlighted](image)
• 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**.

• 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...]

**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 **Expire survey** or **Deactivate survey** button.

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**Stop this survey (228999)**

**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.

<table>
<thead>
<tr>
<th>Expiration</th>
<th>Deactivation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• No responses are lost.</td>
<td>• All responses are not accessible anymore with LimeSurvey. Your response</td>
</tr>
<tr>
<td>• No participant information lost.</td>
<td>table will be renamed to: lime_oid_228999_20160804092706</td>
</tr>
<tr>
<td>• Ability to change of questions, groups and parameters is still limited.</td>
<td>• All participant information is lost.</td>
</tr>
<tr>
<td>• An expired survey is not accessible to participants (they only see a</td>
<td>• A deactivated survey is not accessible to participants (only a message</td>
</tr>
<tr>
<td>message that the survey has expired).</td>
<td>appears that they are not permitted to see this survey).</td>
</tr>
<tr>
<td>• It’s still possible to perform statistics on responses using LimeSurvey.</td>
<td>• All questions, groups and parameters are editable again.</td>
</tr>
<tr>
<td></td>
<td>• You should export your responses before deactivating.</td>
</tr>
</tbody>
</table>

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**Accessing Survey Results**

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

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To view survey statistics, click on the **Statistics** button.
• Select all questions and click the View statistics button.

For More Information...
• Please see the Limeservey Online Manuel: http://manual.limesurvey.org