Quick Start Guide for using LimeSurvey

NPS Resources:

NPS LimeSurvey: https://survey.nps.edu/admin/
NPS LimeSurvey Wiki: https://wiki.nps.edu/pages/viewpage.action?pageId=121536596 or https://wiki.nps.edu/display/IT/LimeSurvey

Note, NPS' version of LimeSurvey is older than the one shown in the LimeSurvey Manual images. Most actions are still the same, but there may be some differences between the two.

Other External Resources:

LimeSurvey: http://www.limesurvey.org/
LimeSurvey Online Documentation: https://manual.limesurvey.org/LimeSurvey_Manual

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Basic LimeSurvey Tips:

1. This guide is intended to be a quick reference only, not a complete training guide. Please refer to LimeSurvey's website for detailed information when you have questions. https://manual.limesurvey.org/LimeSurvey_Manual

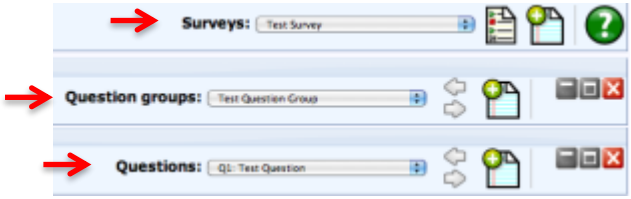
2. To have an account created in LimeSurvey, you will need to contact the appropriate administrator. Administrators' contact information can be found here: https://wiki.nps.edu/display/IT/LimeSurvey

3. Buttons in the images for this guide may be a little different depending on your user permissions.

4. LimeSurvey will nest similar looking **Toolbars** as you move deeper into each element of your survey. Each **Toolbar** has the name of the **Toolbar** heading on the left side of the screen.

5. Click on the **Question Mark Button** (upper right) to open the help documentation on the LimeSurvey website.

6. Drop down menus can help you quickly navigate between different parts of your survey depending on which **Toolbar** you are in.



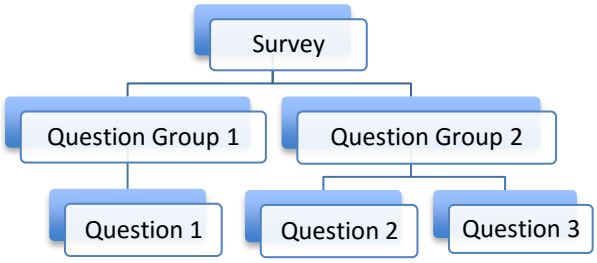
7. Clicking your browser's "Back" button is not recommended. It is better to use the drop down menus above to navigate back or between sections of the survey. LimeSurvey also does not have "Cancel" buttons. If you start something that you do not want, and want to cancel the operation, use the drop down menus or click on the **Detailed List of Surveys Button** leave the screen that you are on.

Quick Start Guide Sections:

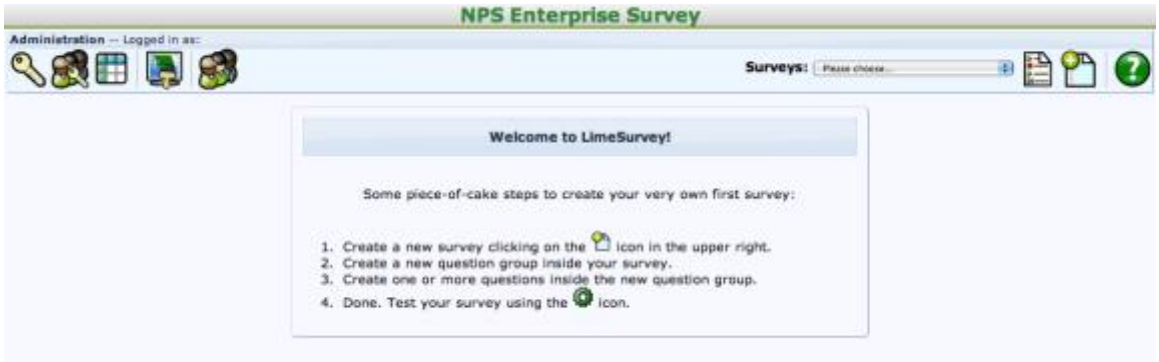
INTRODUCTION

For an overview of basic survey elements, video tutorials, etc., go to:
https://manual.limesurvey.org/Creating_surveys_-_Introduction

LimeSurveys are organized into three elements: **Survey**, **Question Groups** and **Questions**. A **Survey** requires a unique name/title, 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**.



When you receive access to the LimeSurvey Survey website, go to https://survey.nps.edu/admin/ and log in using your ERN credentials. Once you are logged in, you will be presented with this screen.



To start a **New Survey** click on the **Create, Import, Copy a Survey Button** (paper with the plus sign)  in the upper right hand corner.

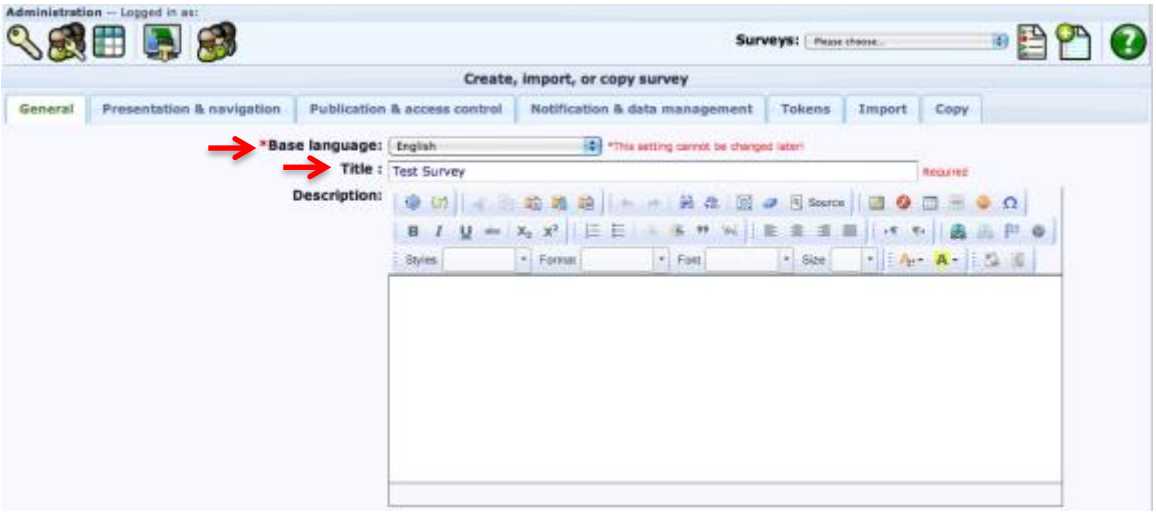
If you have a survey and would like to return to the list of surveys, click on the **Detailed List of Surveys Button**  in the upper right hand corner.

Helpful Hints:** As you prepare your ***Human Subjects Research survey(s), it is recommended that you create the Informed Consent section first! Be aware, when testing your survey, the Informed Consent logic will only work when the survey is active. You may need to activate and deactivate your survey at times. Take care to note that when a survey is deactivated, the results are deleted. But when you expire a survey, you will not be able to reactivate it. You will have to export your survey and reimport it as a new survey.

CREATE A NEW SURVEY

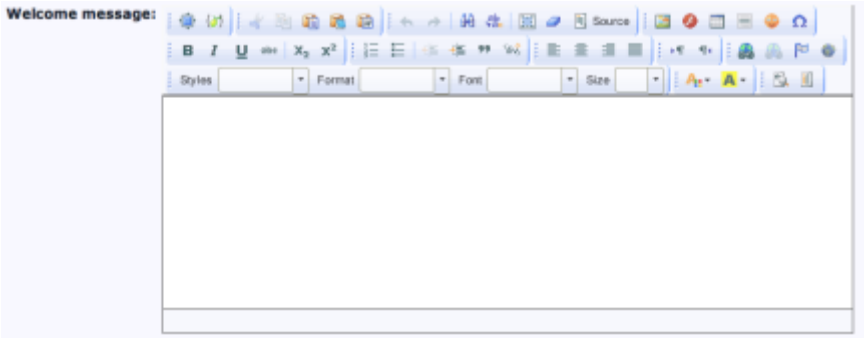
*For detailed information about creating a **New Survey**, go to:*
https://manual.limesurvey.org/Survey_settings

After you click on the **Create, Import, Copy a Survey Button**, you will see the Create, Import or Copy Survey screen.



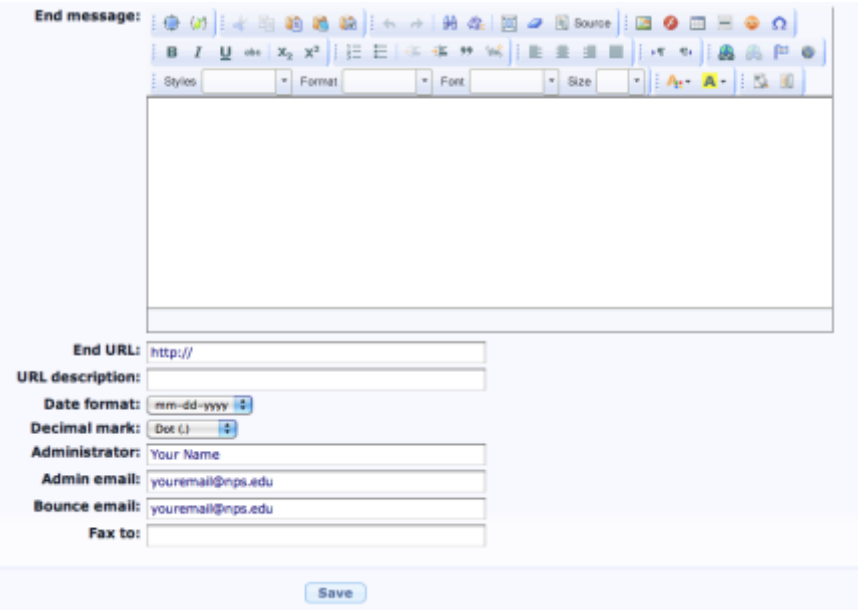
There are only two **required** fields for creating a survey, **Base Language** and **Title**. (Note: **Base Language** allows you to have multi-lingual surveys, but does not translate the survey text for you.) The **Description** field is a brief description of your survey. It is used in the system-generated email sent to 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.



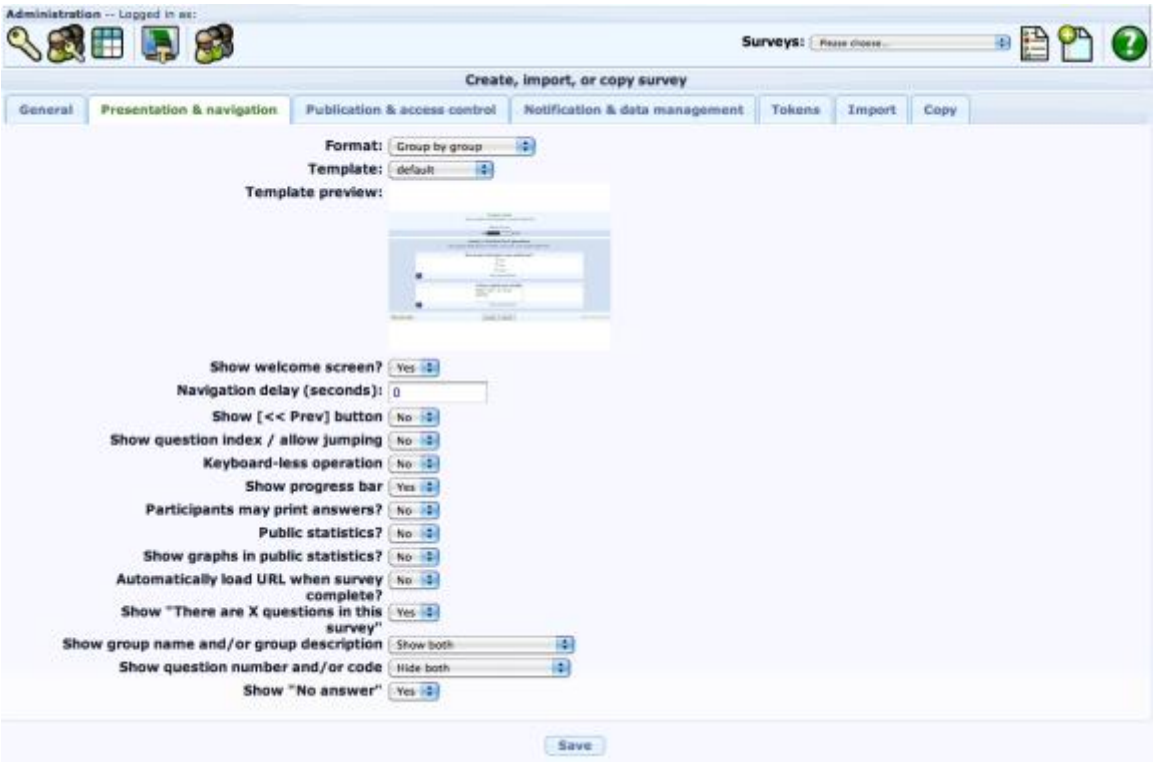
For Human Subjects Research, DO NOT use this field! You will be using your recruitment script as your introduction. Go to "Hiding the Introduction Page" in the ***Presentation & navigation*** *section (next) to learn how to turn this section off on your survey.*

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 with more information about your research, NPS, etc. 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.



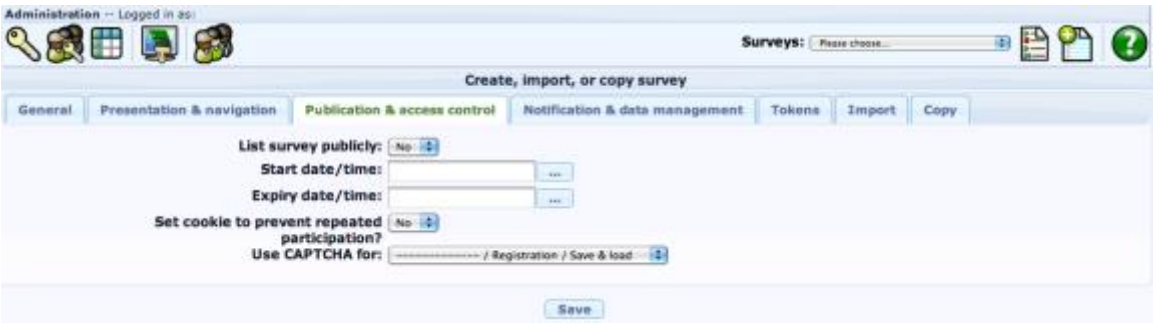
You can explore the tabs across the top of this screen for more features.

Presentation & navigation allows you to adjust how the participant navigates through the survey and templates for the survey.



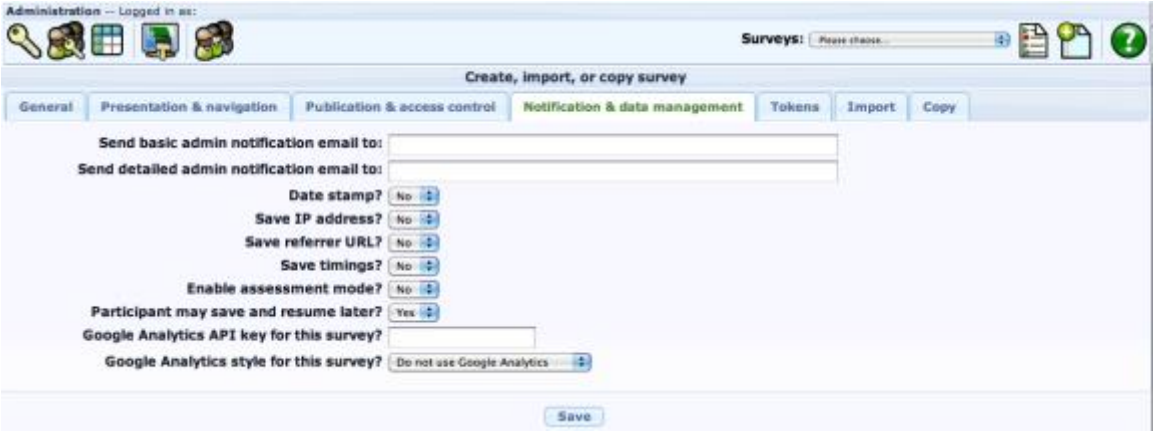
***Hiding the Introduction Page:** For Humans Subject Research, you must turn off the welcome/introduction page on your survey. LimeSurvey displays this by default, and you will need to turn it off. To do this, go to the **Presentation & Navigation** tab shown above. On this screen change the **Show welcome screen?** option to "**No**."

Publication & 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.

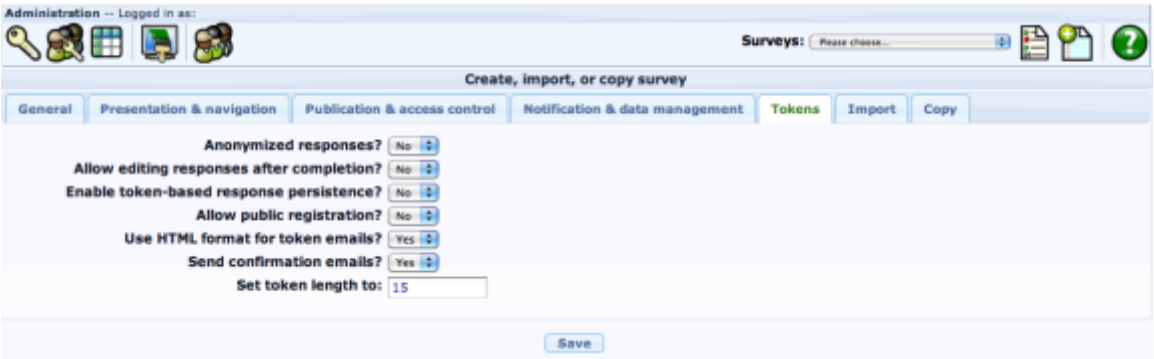


***Helpful Hints:** If you only want your survey to be available to the participants you send the link to, make sure that **List Survey Publicly** is set to "**No**."

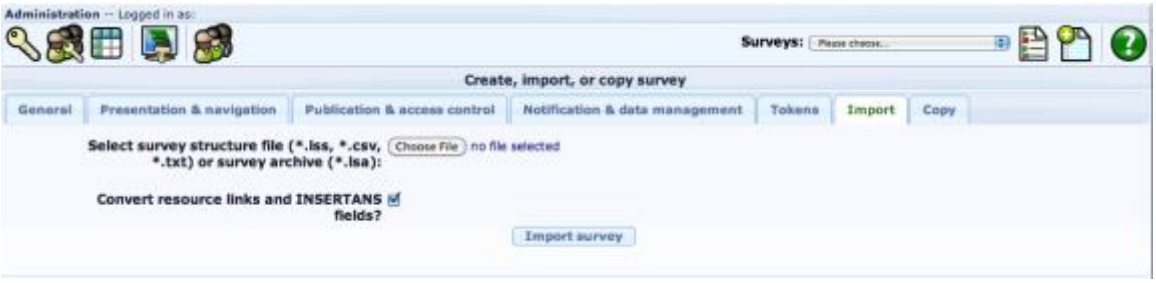
Notification & data management allows you to send notification emails, and set saved information for each survey.



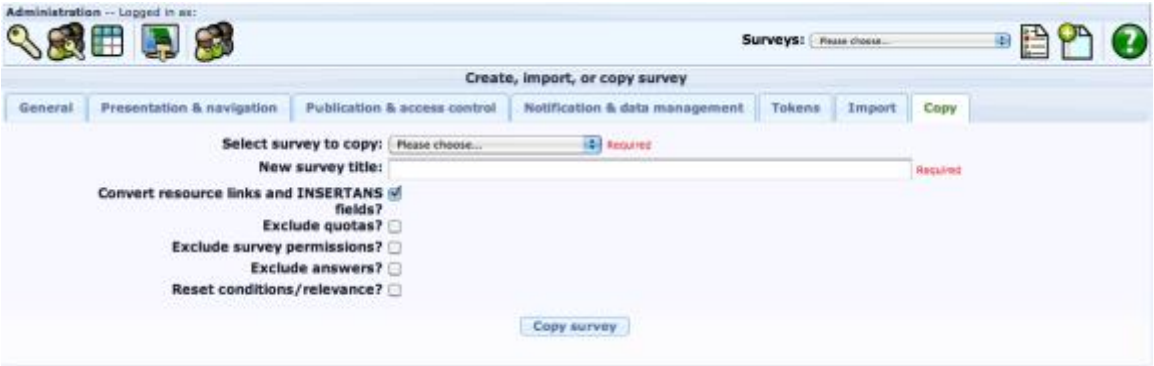
Tokens are used to invite specific participants to take your survey. This screen allows you to control how the tokens are used. Tokens are not needed if you plan to send out one general survey link to a group of participants. Be aware, when you **Deactivate** your survey, your **Tokens** will also be deleted.



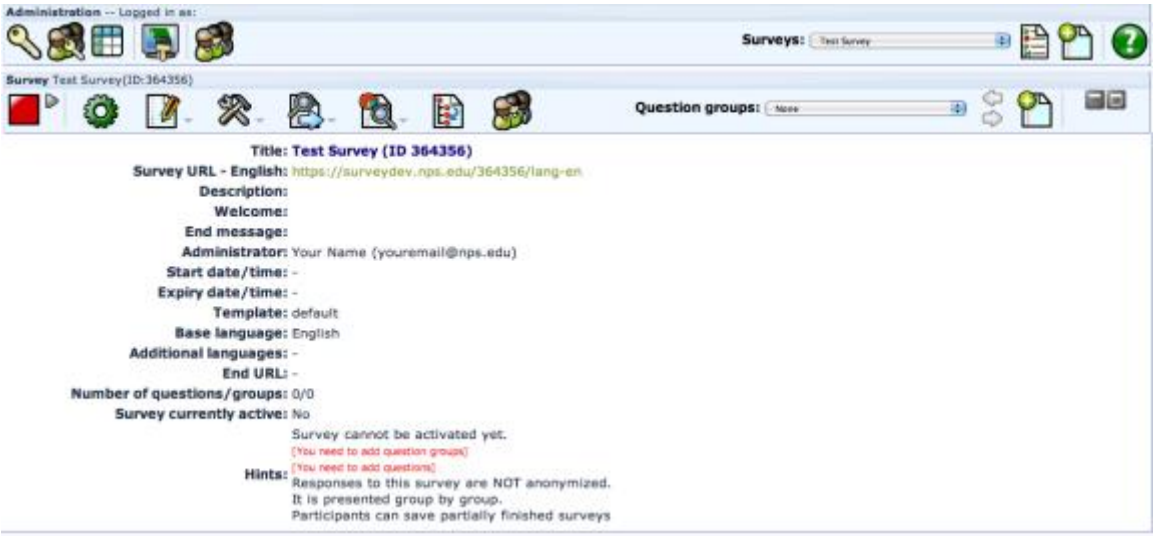
Import allows you to bring in past survey information in *.lss, *.csv and *.txt format. Go to the LimeSurvey site for more information on how to import survey information. You can use **Import** to bring in an exported expired survey.



Copy 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.



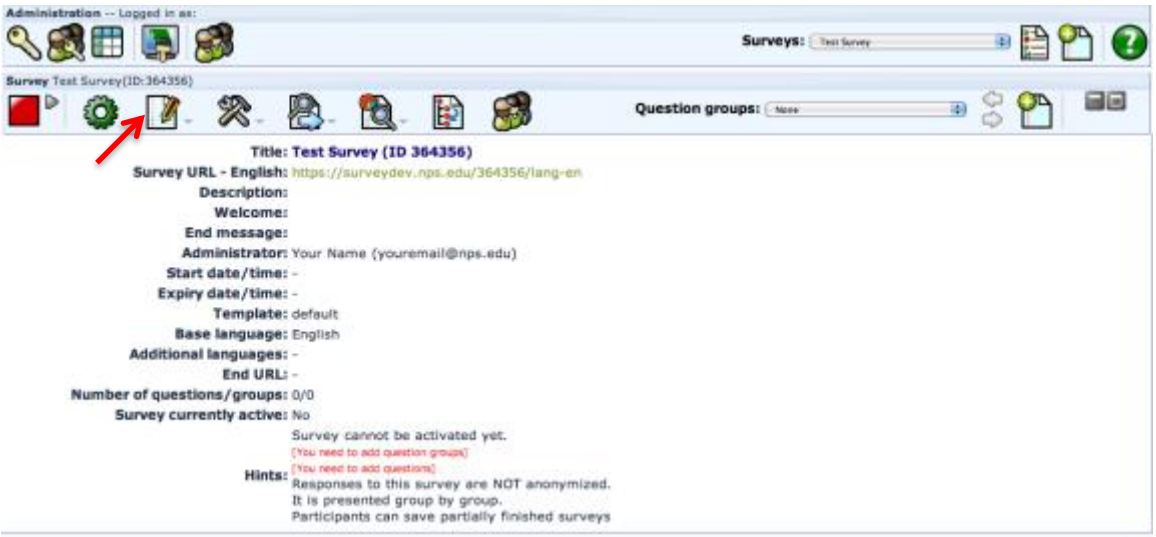
When done entering information click **Save** at the bottom of the screen (or **Import Survey**/**Copy Survey** as appropriate).



***Helpful Hints:** If you ever need to return to these settings, you can find them under the **Survey Properties Button** -> **General Settings.** Tabs above are available except for **Import** and **Copy**, along with a few other settings.

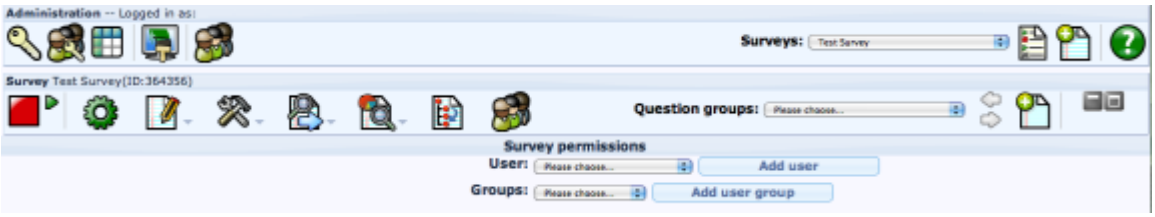
ADDING OTHER USERS TO YOUR SURVEY

If you are working with a group of researchers, or have an advisor that will be working with you on your research, you will need to add other users to your survey. When everyone has an account, go to the **Survey Properties Button** -> **Survey Permissions**. You do not need to do this for your survey participants, only collaborators.

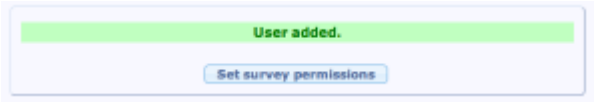


***Helpful Hints:** Each group member will need to have accounts added by the appropriate LimeSurvey administrator. If you have a large group of collaborators on your survey, please contact your administrator for assistance on creating a user group and then granting the group permission to access your survey.

From here, you will 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 for your situation.

	Permission	<<	Create	View/read	Update	Delete	Import	Export
	Assessments	☐	☐	☐	☐	☐		
	Quick translation	☐		☐	☐			
	Quotas	☐	☐	☐	☐	☐		
	Responses	☐	☐	☐	☐	☐	☐	☐
	Statistics	☐		☐				
	Survey activation	☐			☐			
	Survey content	☐	☐	☐	☐	☐	☐	☐
	Survey deletion	☐				☐		
	Survey locale settings	☐		☐	☐			
	Survey security	☐	☐	☐	☐	☐		
	Survey settings	☐		☐	☐			
	Tokens	☐	☐	☐	☐	☐	☐	☐

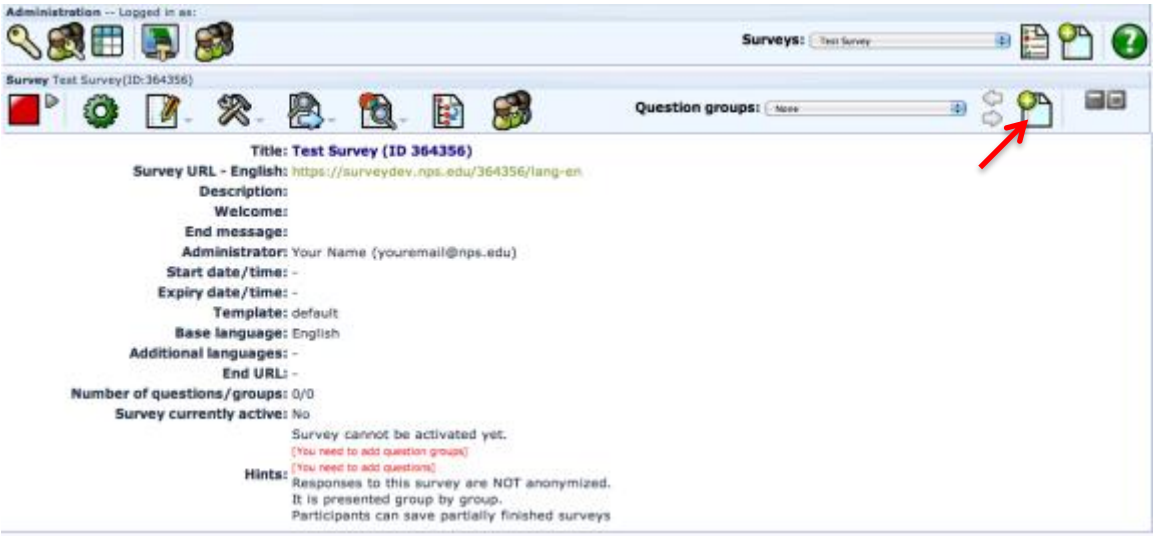
Save now

QUESTION GROUPS

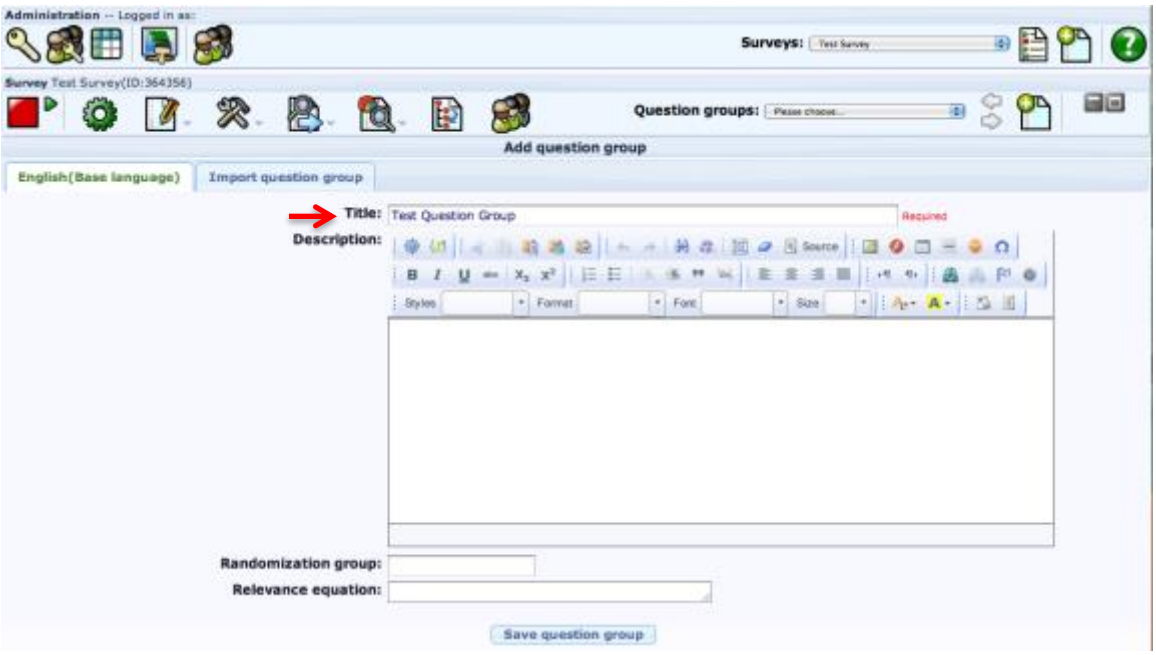
*For more information on **Question Groups**, go to:*
https://manual.limesurvey.org/Creating_a_question_group

Helpful Hints:** If you are performing ***Human Subjects Research, your first **Question Group** will be for a participant Informed Consent. Skip to the Informed Consent (page 19) section to create your first **Question Group** and Informed Consent **Question**, then return to continue adding addition **Question Groups**.

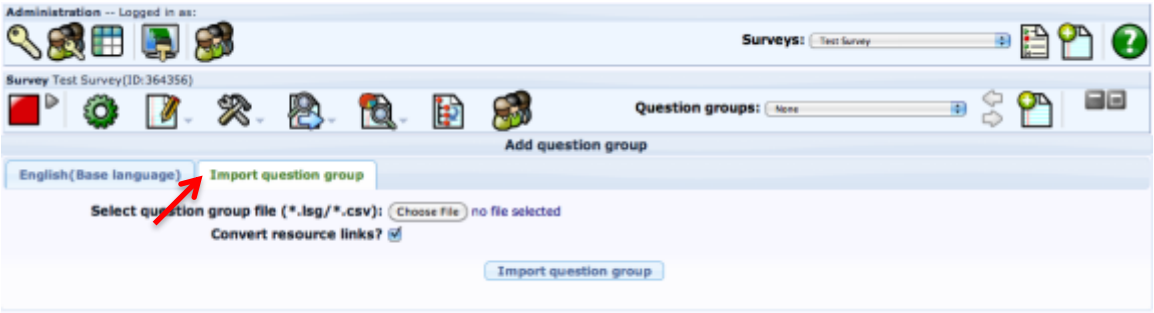
Every survey must contain at least one **Question Group**. To add a new group, go to the **Survey Toolbar**, click on the **Add New Group to Survey Button**.



For new groups, enter the **Title** (**required**) and any other information you would like to add.



To import a **Question Group** exported from a previous survey, click on the **Import Question Group Tab**.



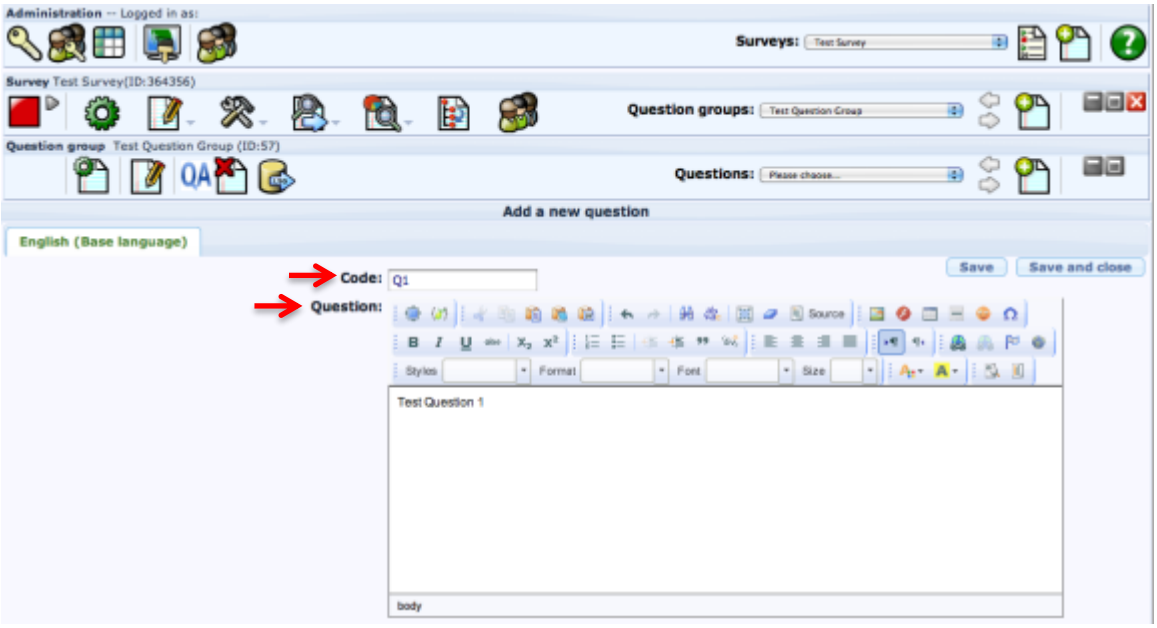
Click on **Save Question Group Button** or **Import Question Group Button** and you will have added the group to your survey.

QUESTION TYPES

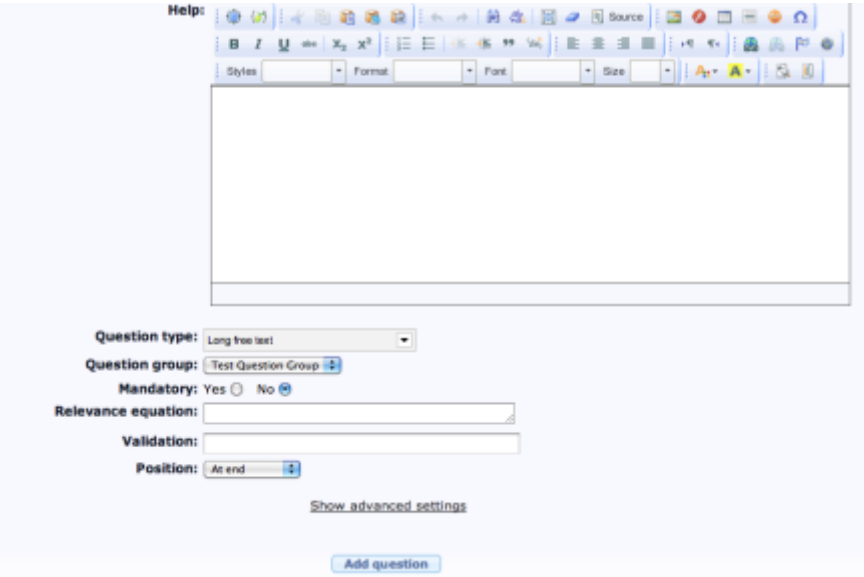
*For more information on **Question Types**, go to: https://manual.limesurvey.org/Adding_a_question*

To add a new question to your **Question Group**, click the **Add New Question to Group Button**.

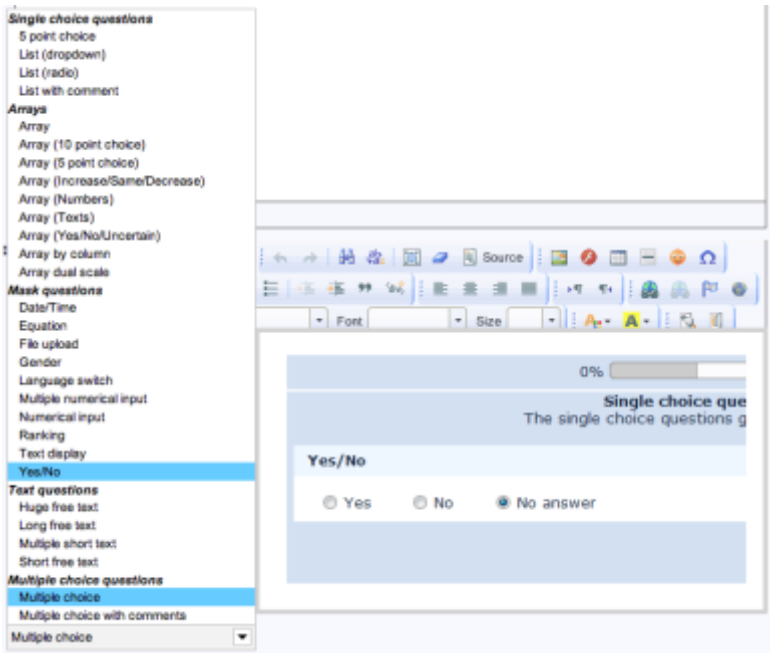
Enter the **Code** for the question. This can be a number, combination of characters and numbers, or text. Next, enter the **Question** text.



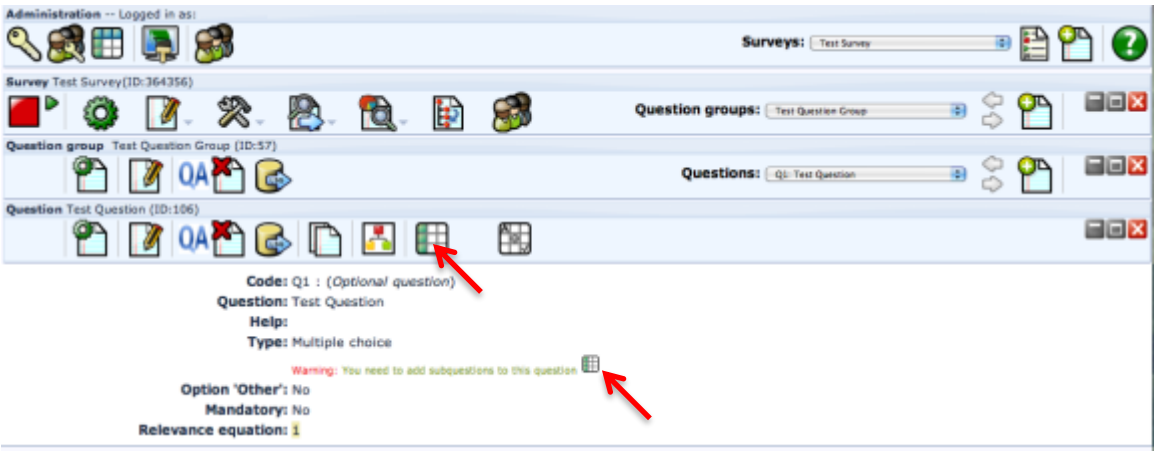
Enter any **Help** text that you would like to include for the question. The **Help Text** is visible to survey participants. Then choose the **Question Type** from the menu. If needed, you can change the **Question Group** in the next menu. For **Mandatory**, choose whether the question requires an 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). When you have entered more than one question, you will see an additional drop down menu that allows you to change the position this question appears in the group. This option is only visible during the new question entry. You can reorder questions and groups after they have been entered. Use the Helpful Hint at the end of this section to learn how.



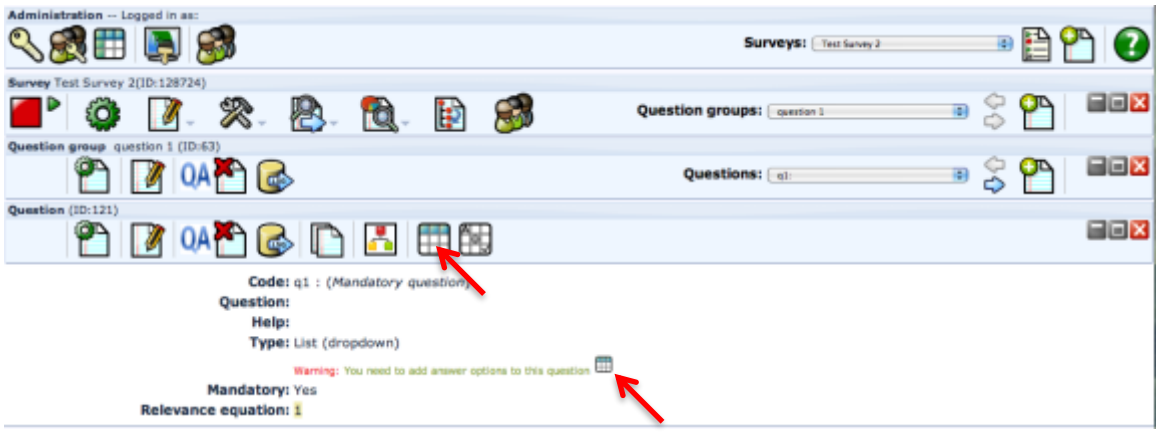
A list of all of the question types in LimeSurvey is shown below. When you hover over an option, a sample displays to the right of the menu. More information on how each question works can be found on the LimeSurvey site at: https://manual.limesurvey.org/Question_types



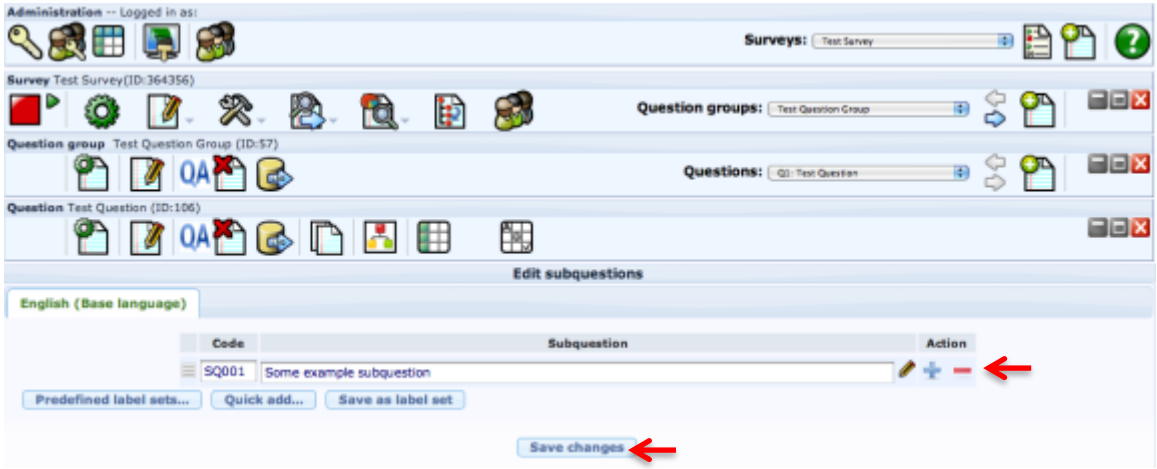
When done, click the **Add Question** or either of the **Save Buttons**. If you click **Add Question** or **Save and Close**, you should be redirected to the question screen. If not, navigate back to the question screen. For questions that require choice options, like Multiple Choice or Drop Down List, you will add answer choices by clicking either of the **Edit Subquestions for This Question Buttons** …



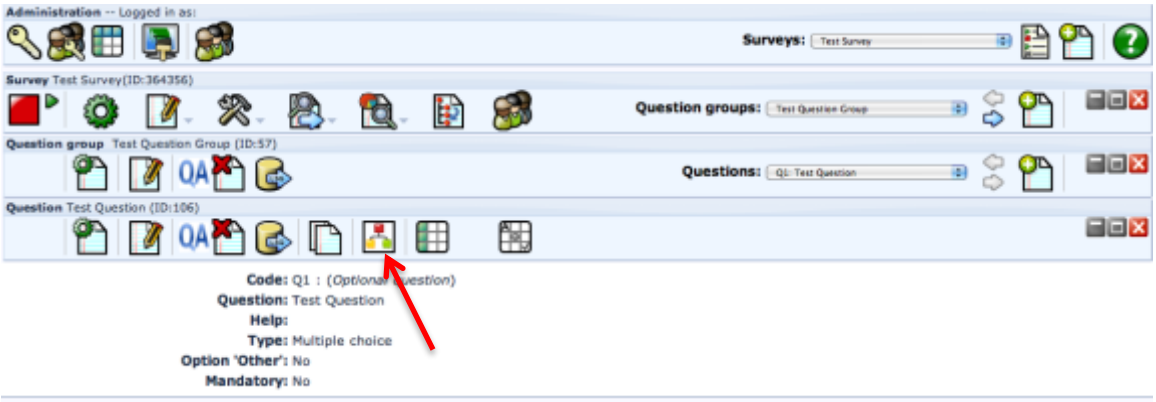
... or the **Edit Answer Options for This Question Buttons**.



Enter the **Subquestion/Answer** text, and then click the plus sign to add more. If you want to remove an unintended answer, click the minus sign to delete it. Clicking the pencil icon next to the row will open a WYSIWYG editor for the question. When done editing, this will insert HTML code into the **Subquestion/Answer** field. Click the **Save Changes Button** when done.

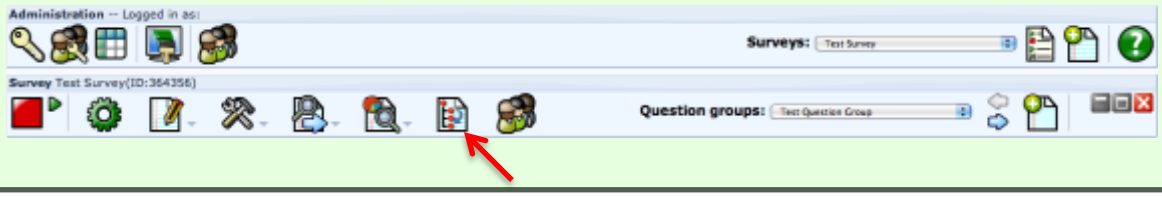


Branching logic can be added by clicking the **Set Conditions for this Question Button**  . For more information and instructions on how to add branching logic, go to: https://manual.limesurvey.org/Setting_conditions



You can quickly view the entire survey by clicking on the **Test This Survey Button** on the **Survey Toolbar**. Or you can test the individual question by clicking on the **Preview This Question Button** on the **Question** or **Question Group Toolbars**.

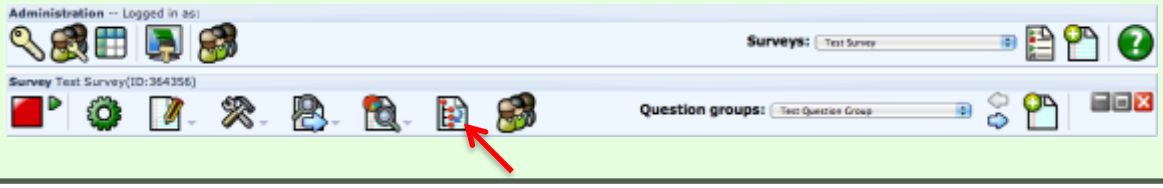
***Helpful Hints:** If you need to rearrange your **Questions** or **Question Groups**, use the **Reorder Question Groups / Questions Button** in the **Survey Toolbar**. You can click on the Group Name or the Question Name and drag to reorder.



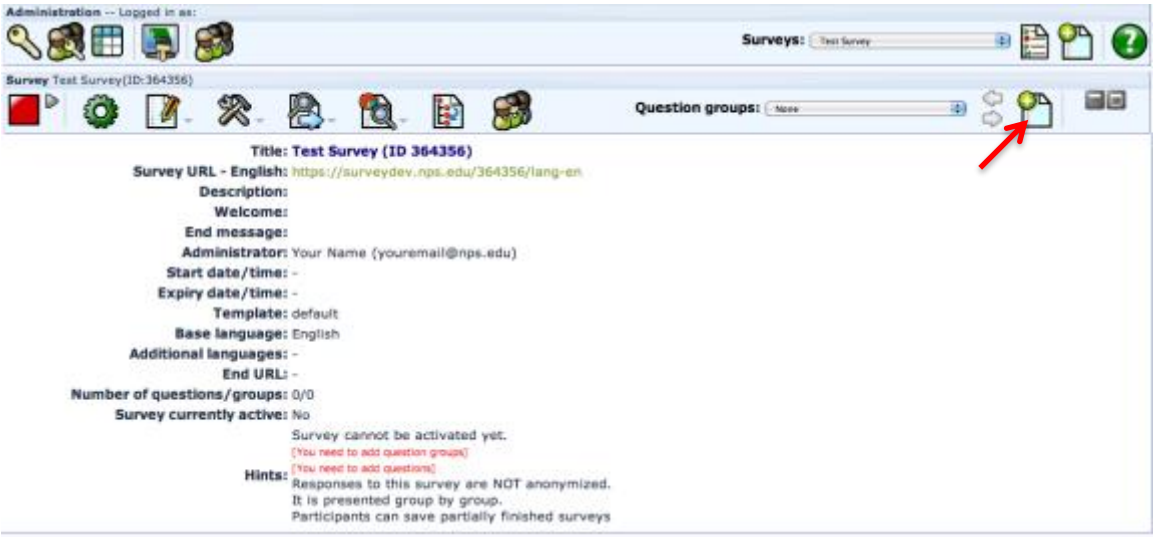
INFORMED CONSENT & MAX RESPONSE LIMIT (*HUMAN SUBJECTS RESEARCH*)

For Human Subjects Research, the first question of your survey will need to include an Informed Consent **Question** for your participants. Follow these steps to create an Informed Consent **Question**. If you do this after your survey is completed, you will need to perform some extra steps to get the consent to work.

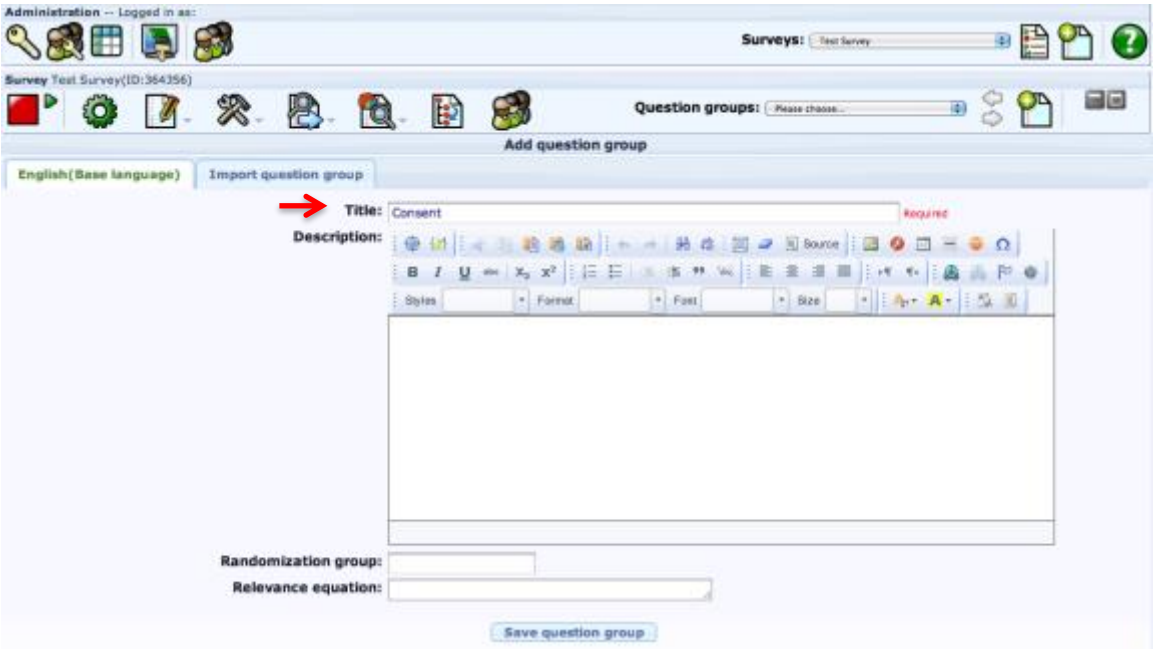
***Helpful Hints:** You will only be able to test the consent logic if the survey is active. Consent will not work in test mode. If you entered your Informed Consent after you started working on your survey, go to the **Survey Toolbar** and click the **Reorder Question Groups / Questions Button**. Click and drag the consent group name to the top of the list. If you wish, activate your survey and the click the survey link to test to make sure that the **Quota** still works. If it does, you will exit the survey when Informed Consent **Question** is answered "No."



Create a new group to your survey by clicking the **Add New Group to Survey Button.**

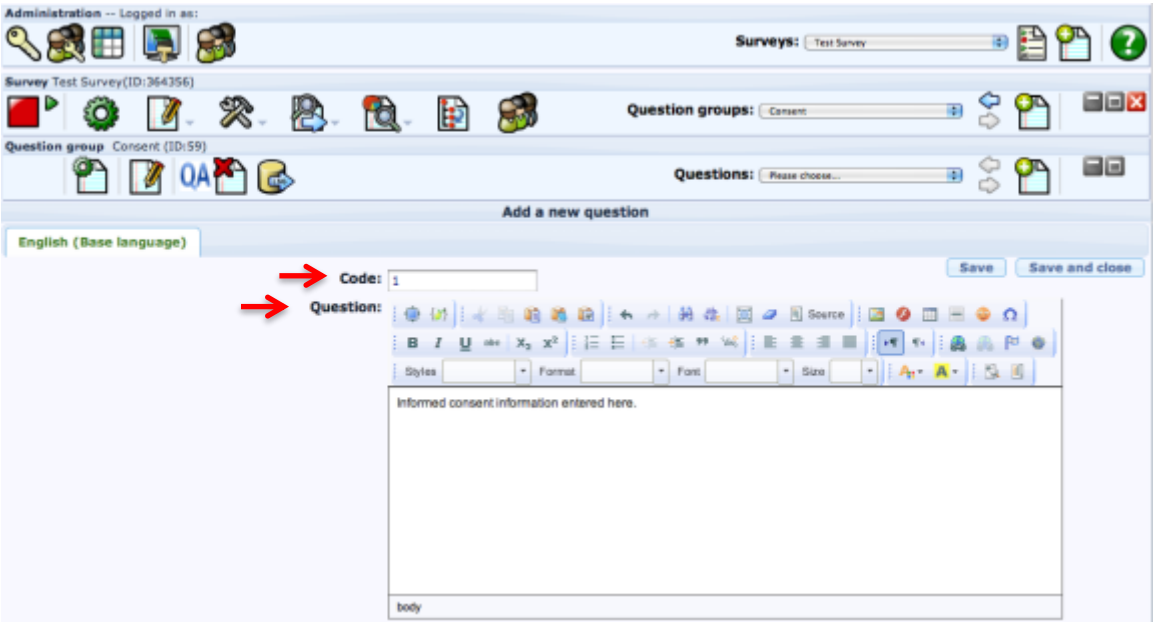


Fill in the group **Title** (**required**), leave the **Description** field BLANK, and then click **Save Question Group**.

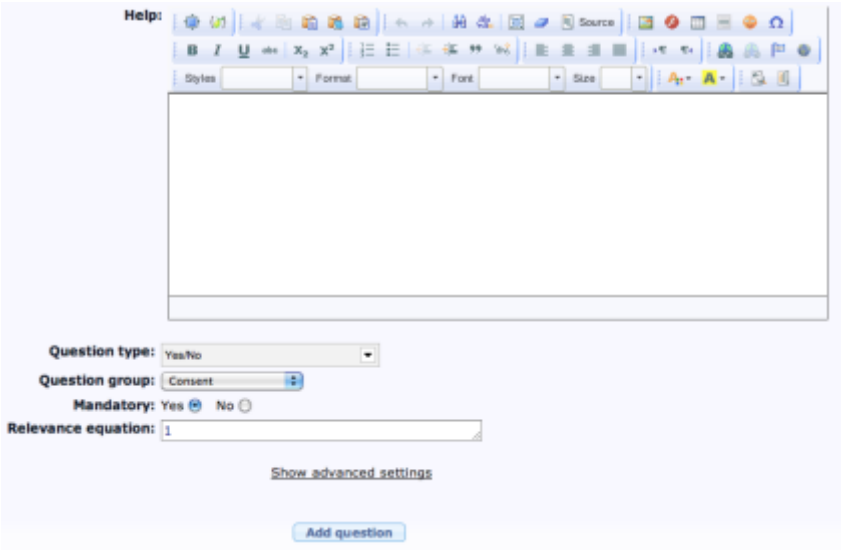


Click **Add New Question to Group Button** to add your consent statement.

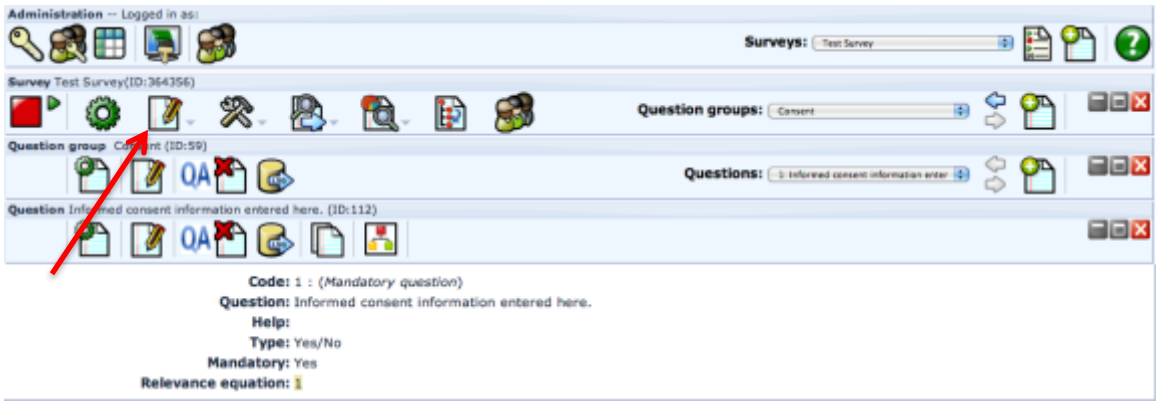
Enter your question **Code** and paste your consent statement into the **Question** field.



If you wish, you can enter an explanation of what the consent is for in the **Help** field. Choose "**Yes/No**" from the **Question Type** drop down menu. Change **Mandatory** to "**Yes**." Click **Add Question**.

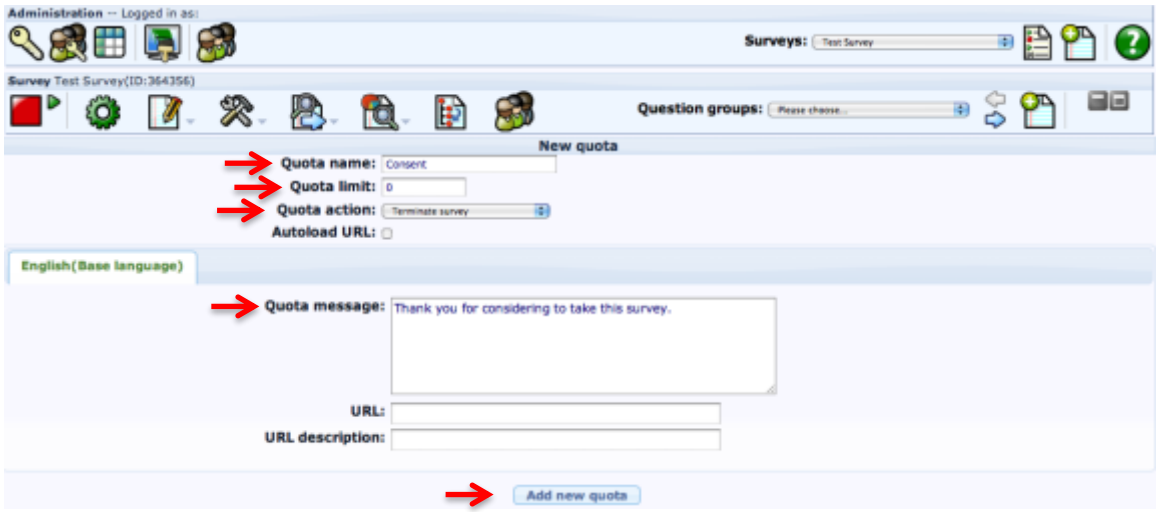


Next, go to **Survey Properties** -> **Quotas** to set the exit logic for a “No” response.



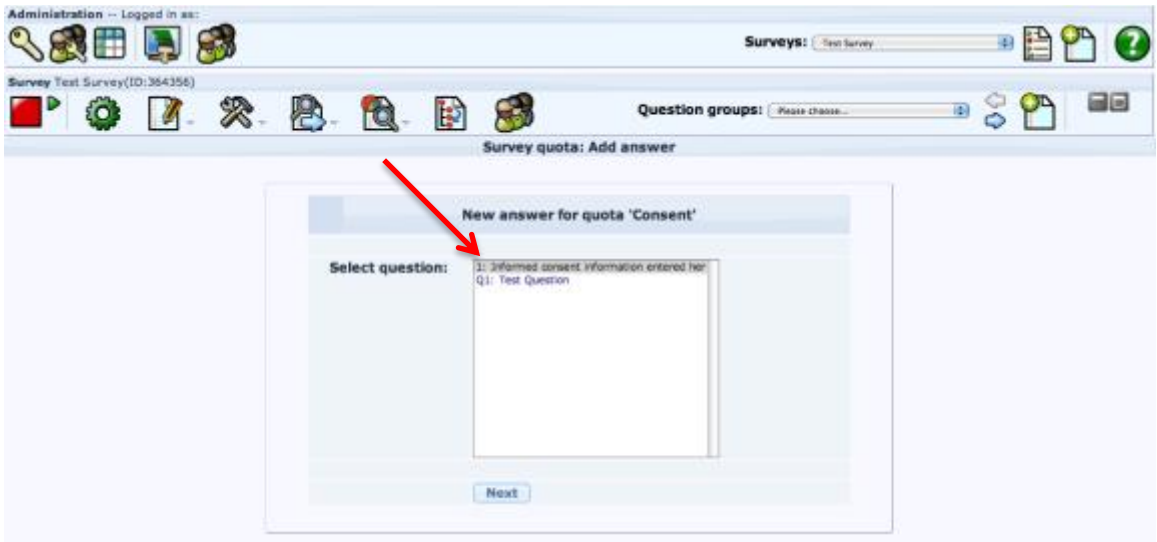
Click **Add New Quota**. *(More information about **Quotas** can be found here: https://manual.limesurvey.org/Quotas)*

Enter a **Quota Name**, “**Consent**,” and set the **Quota Limit** to “**0**.” Check to make sure that the **Quota Action** is set to “**Terminate Survey**.” Enter a message that the participant will see if they select “No” into **Quota Message**. You may also enter a link for the person to visit in the **URL** field and **URL Description** to be linked. When done, click the **Add New Quota Button**.



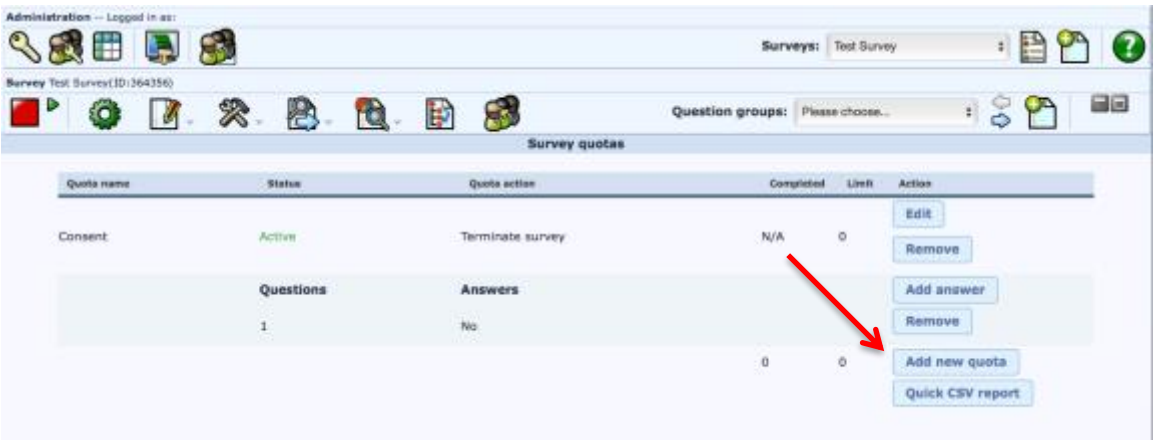
Next, click the **Add Answer Button**.

Choose the consent **Question** in the **Select Question List** then click the **Next Button**.

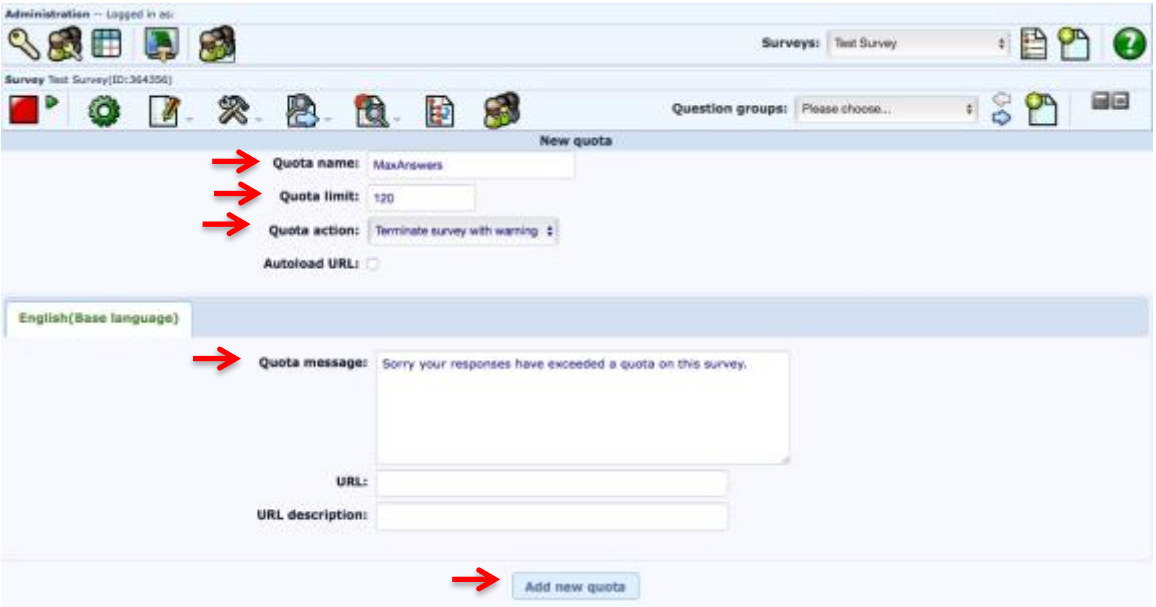


Choose the "**No**" answer from the **Select Answer List** and click the **Next Button**.

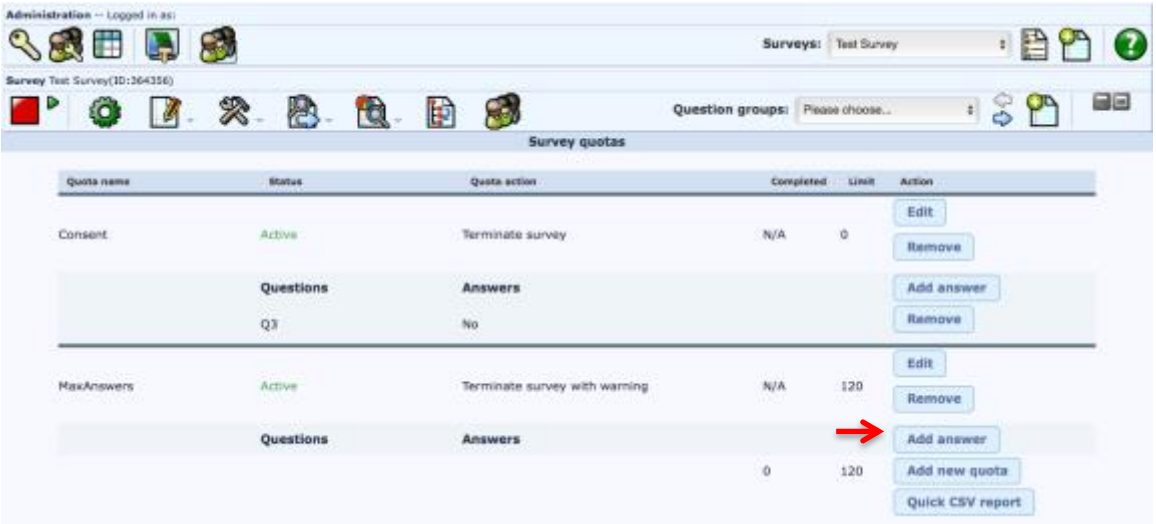
To avoid receiving too many responses to your survey resulting in IRB non-compliance, you will also need to set a maximum limit to your survey. The *maximum threshold* for survey completion is the maximum number of participants approved in your IRB protocol. Setting the maximum number of participants will also be done with a Quota. Click **Add New Quota** again.



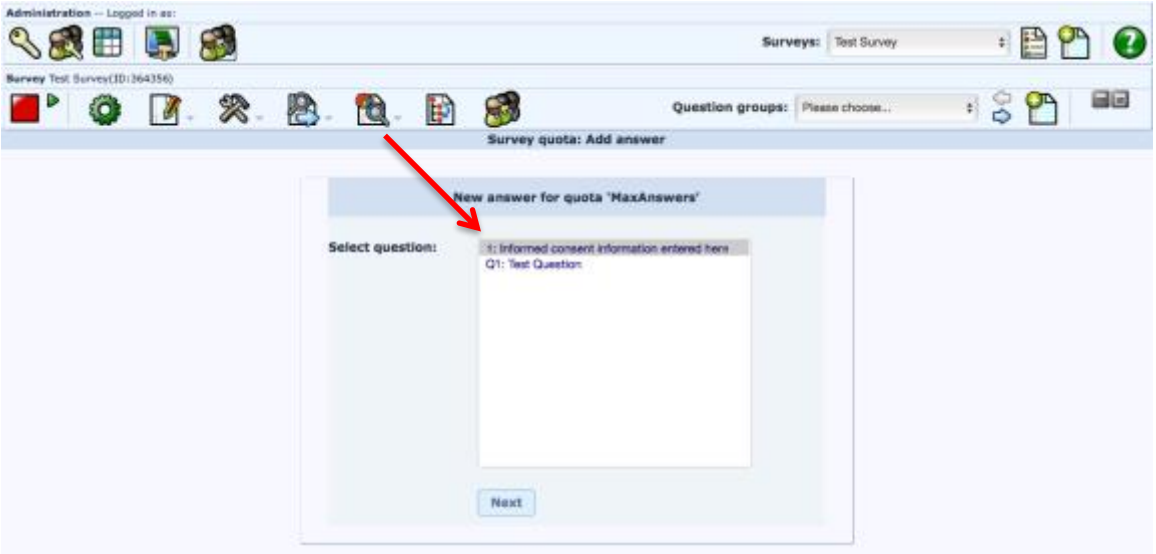
Enter a **Quota Name**, "**MaxAnswers**," and set the **Quota Limit** to your max threshold. Check to make sure that the **Quota Action** is set to "**Terminate Survey With Warning**." Enter a message that the participant will see if they select "Yes" after the maximum number of answers has been reached into **Quota Message**. You may also enter a link for the person to visit in the **URL** field and **URL Description** to be linked. When done, click the **Add New Quota Button**.



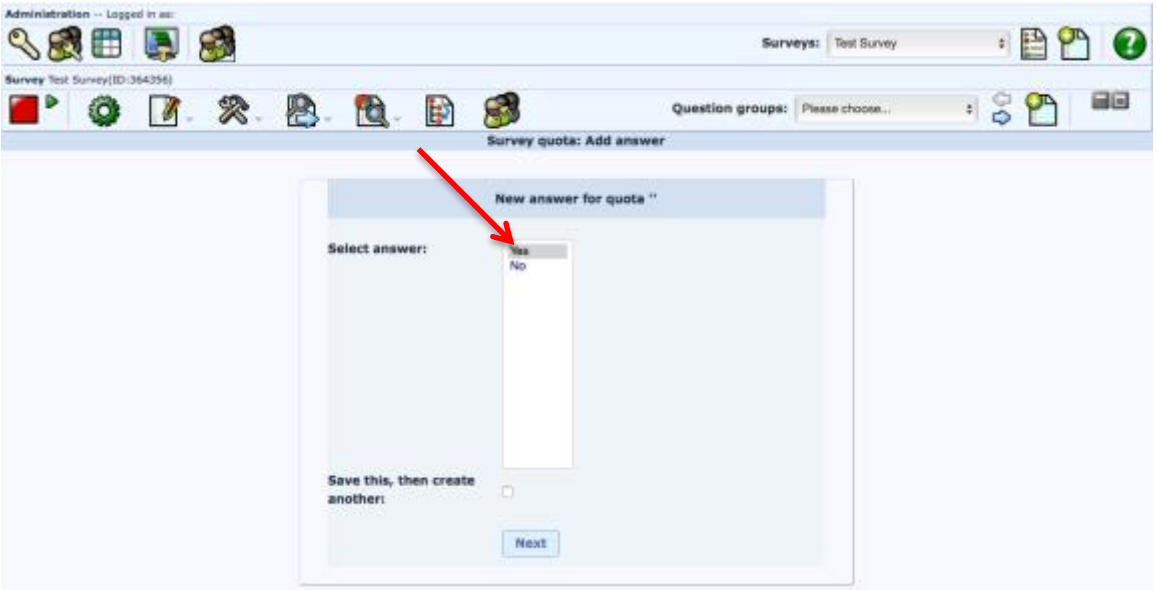
Next, click the **Add Answer Button** for the new Quota.



Choose the consent **Question** in the **Select Question List** then click the **Next Button**.



Choose the "**Yes**" answer from the **Select Answer List** and click the **Next Button**. You have now completed setting the exit logic for the Informed Consent. You can now create a new **Question Group** and add **Questions** to your survey (Page 10).

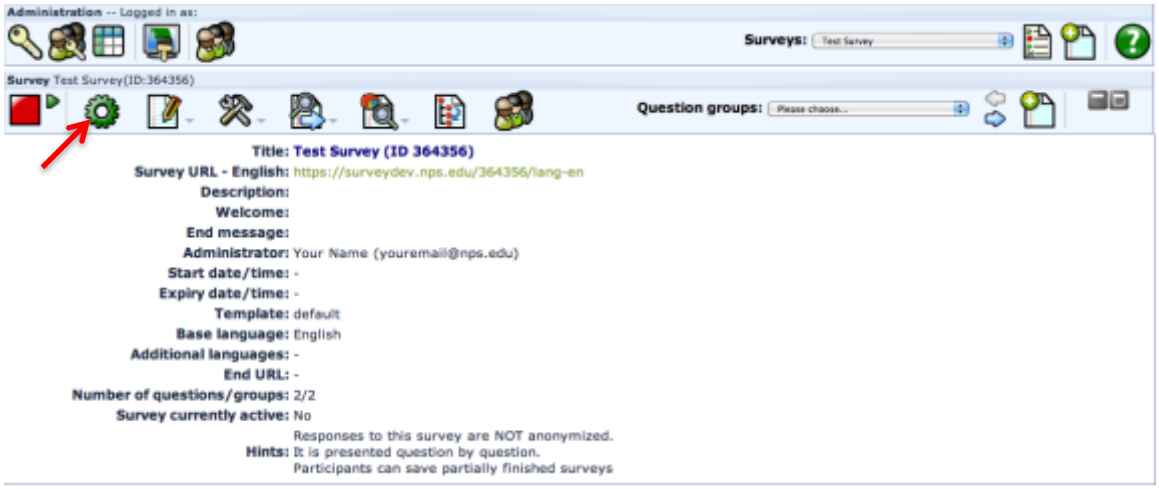


PUBLISHING YOUR SURVEY

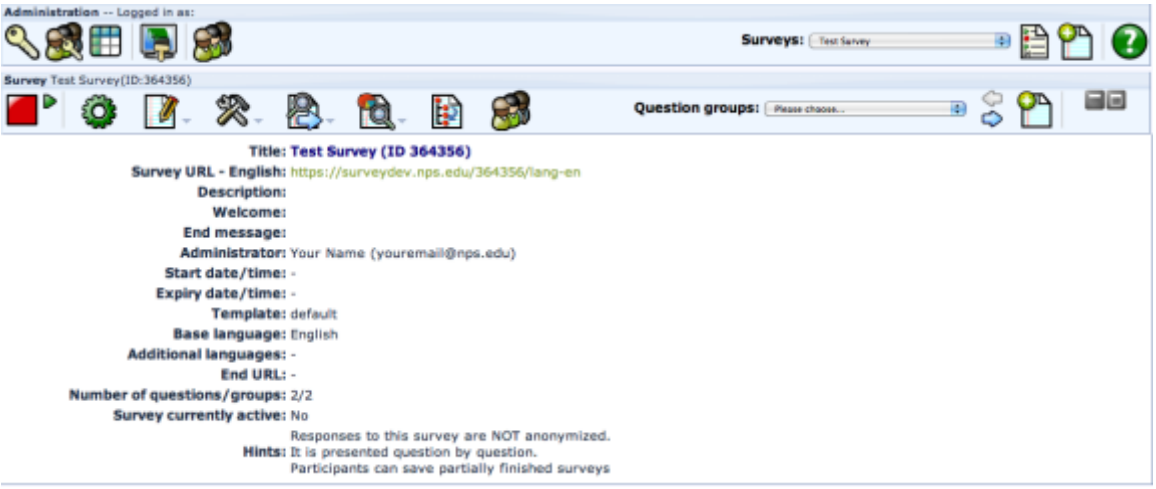
For more information about Managing Surveys go to:
https://manual.limesurvey.org/Managing_Surveys

***Helpful Hints:** 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 **Test This Survey Button**.

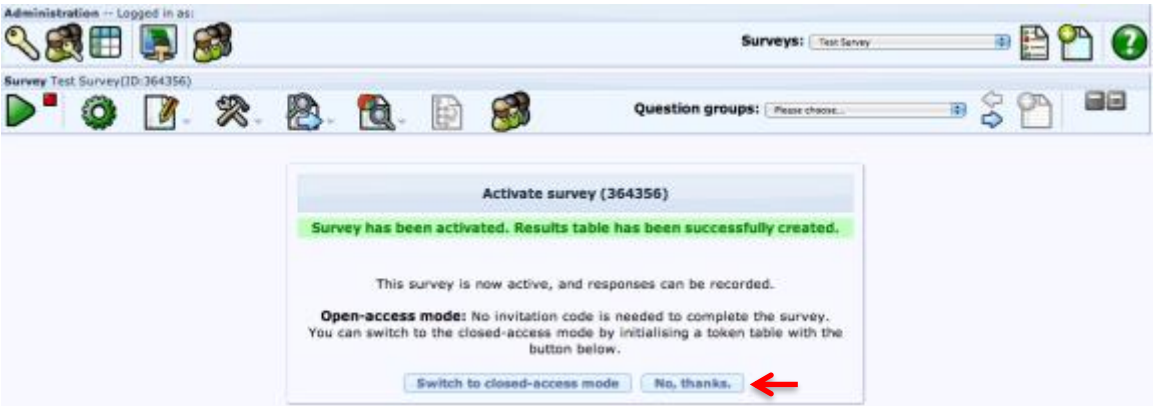


When you are satisfied with your survey, and ready to publish, click the **Activate This Survey Button** (green arrow) on the left side of the **Survey Toolbar**.

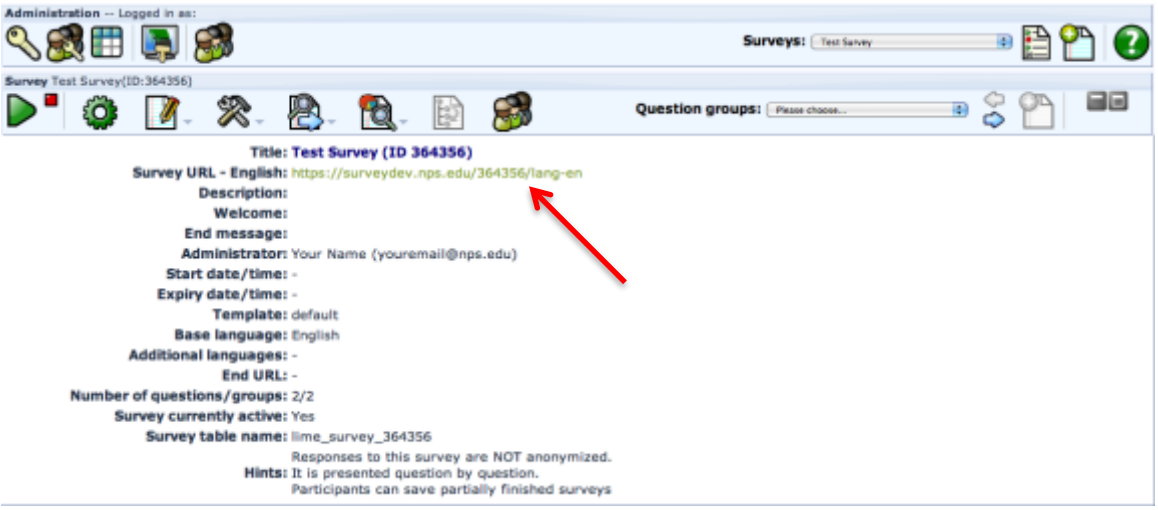


You will have one last chance to change how your survey is presented. Review the settings on this page, and click the **Save / Activate Survey Button** if you are ready to launch your survey.

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. *(For more information on Tokens, see: https://manual.limesurvey.org/Survey_participants.)* If you do not wish to use tokens, click **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.

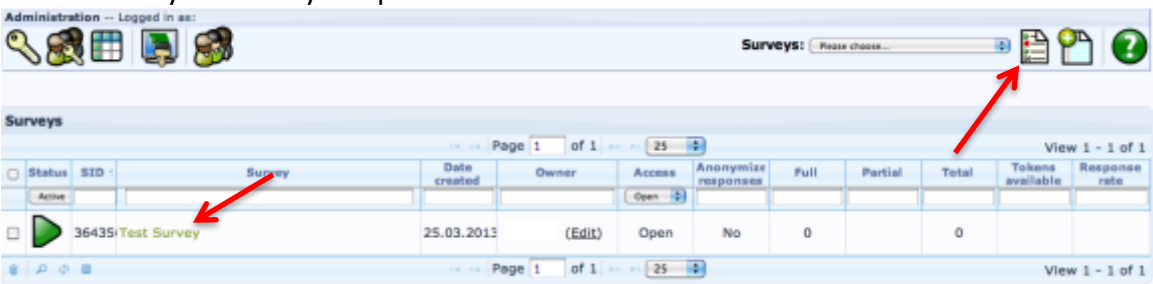


EXPIRING / DEACTIVATING YOUR SURVEY

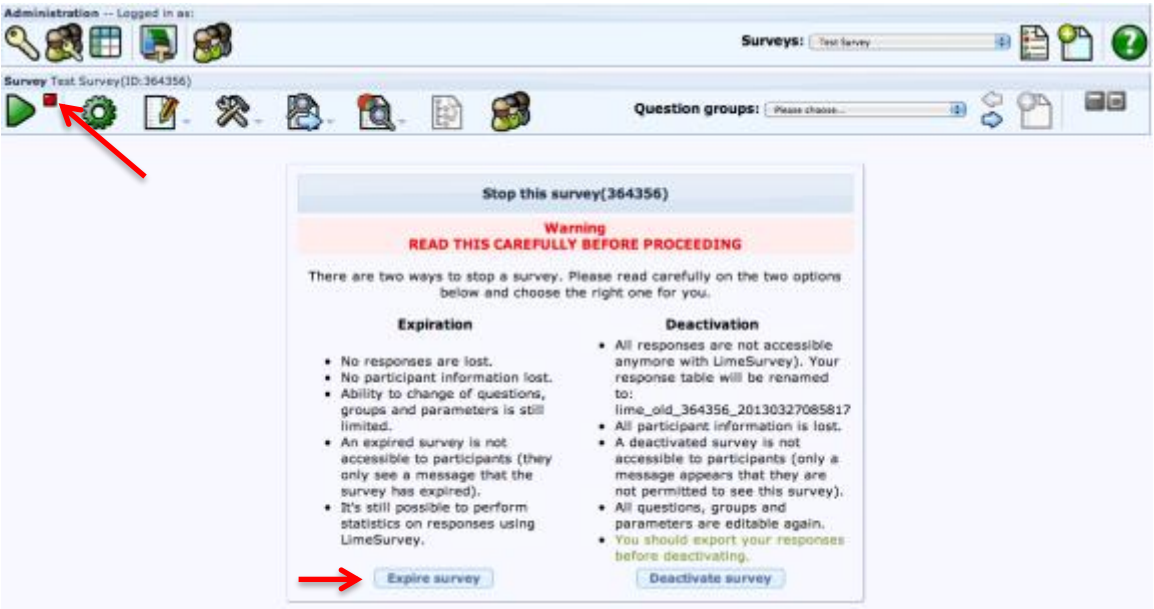
*For more information on **Deactivating Your Survey**, go to:*
https://manual.limesurvey.org/Closing_a_survey

***Helpful Hints:** 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 delete the expiration date setting, export the survey and import it into a new survey, or use the **Copy** tab when you create a new survey. Review the link above for more information.

When you are ready to review your results and deactivate/expire your survey, log back into LimeSurvey. You should be directed to the list of active surveys shown below. If not, click on the **Detailed List of Surveys Button** in the **Administration Toolbar** from any screen in LimeSurvey. Click on the name of your survey to open.



Click on the **Stop This Survey Button**, small red square, to stop your survey. Most users will need to click the **Expire Survey Button** to keep participants from continuing to answer questions, and keep your data on the survey. **Deactivate Survey** will delete ALL survey result data! You must export all of your data before clicking this button. With your survey expired, you are now ready to export your results.

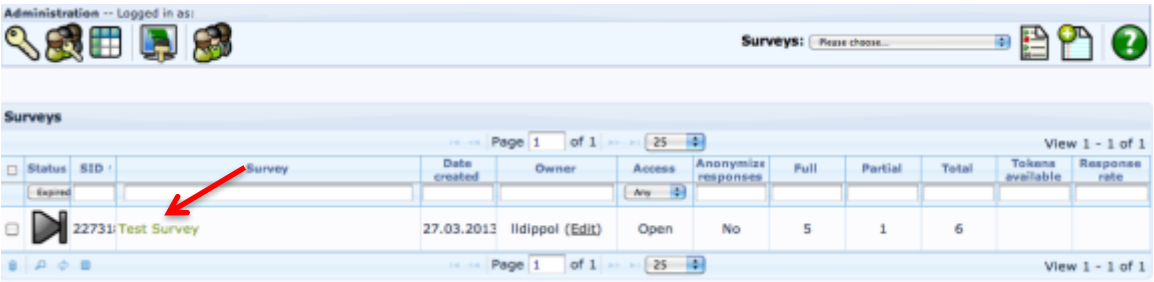


ACCESSING YOUR RESULTS AND EXPORTING DATA

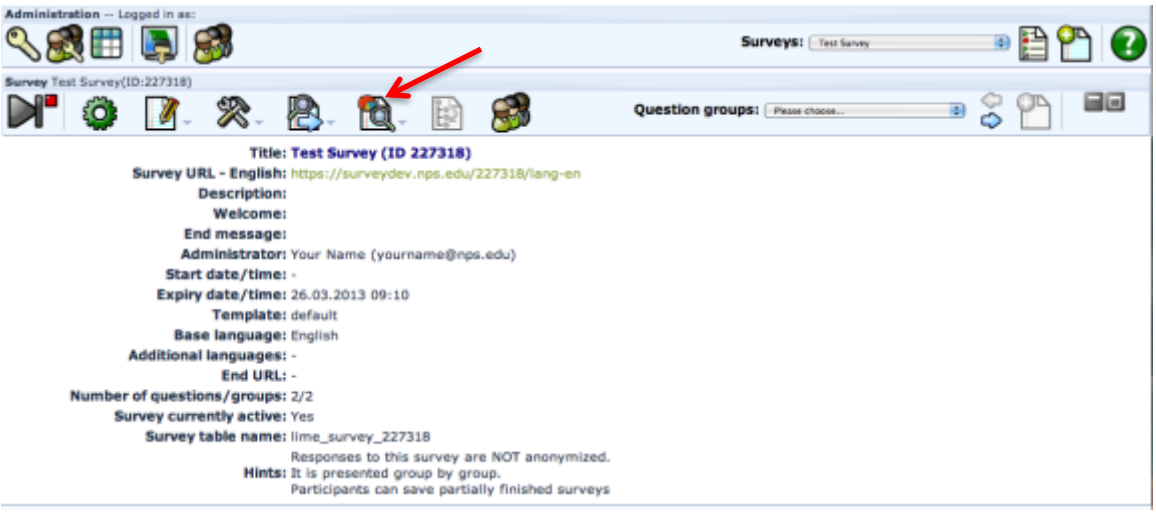
*For more information about **Statistics**, go to: https://manual.limesurvey.org/Statistics*

*For more information about **Exporting Survey Results**, go to: https://manual.limesurvey.org/Exporting_results*

If you are not already in LimeSurvey, log in, navigate to the **Detailed List of Surveys** if you are not already on that screen, and click on your survey's name.



On the **Survey Toolbar**, go to **Responses** -> **Responses & Statistics**.



To view survey statistics, click on the **Get Statistics from These Responses Button**.

To export your data, click on the appropriate **Export Results Button**.

At completion, ***Human Subjects Researchers*** must export the survey and data from LimeSurvey. Copies of the survey and de-identified data must be provided to the IRB when you close the protocol.