

# 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](https://manual.limesurvey.org/LimeSurvey_Manual)

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## Basic LimeSurvey Tips:

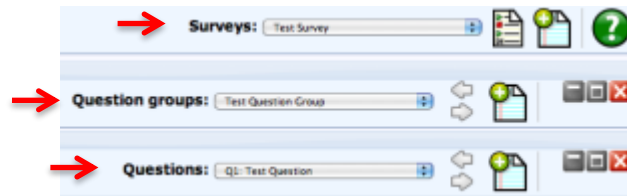
1. This guide is intended to be a quick reference only, not a complete training guide. Please refer to LimeSurvey's website for detailed information when you have questions.  
[https://manual.limesurvey.org/LimeSurvey\\_Manual](https://manual.limesurvey.org/LimeSurvey_Manual)
2. To have an account created 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.




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



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



- 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:

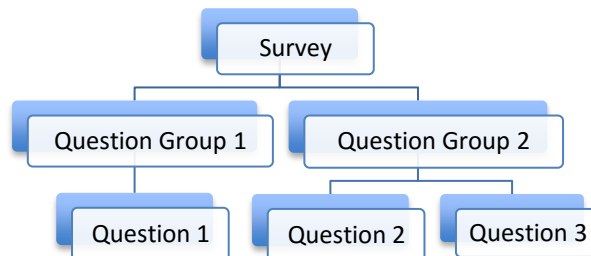
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## INTRODUCTION

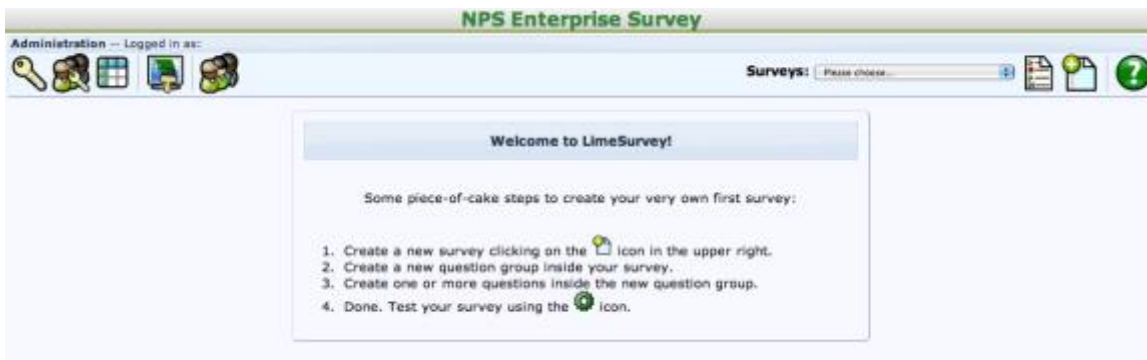
For an overview of basic survey elements, video tutorials, etc., go to:

[https://manual.limesurvey.org/Creating\\_surveys\\_-\\_Introduction](https://manual.limesurvey.org/Creating_surveys_-_Introduction)

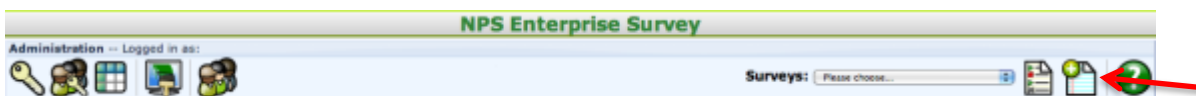
LimeSurveys are organized into three elements: **Survey**, **Question Groups** and **Questions**. A **Survey** requires a unique name/title, and allows the user to set specific settings for each individual survey. Every **Survey** must contain at least one **Question Group**. **Question Groups** allow 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.



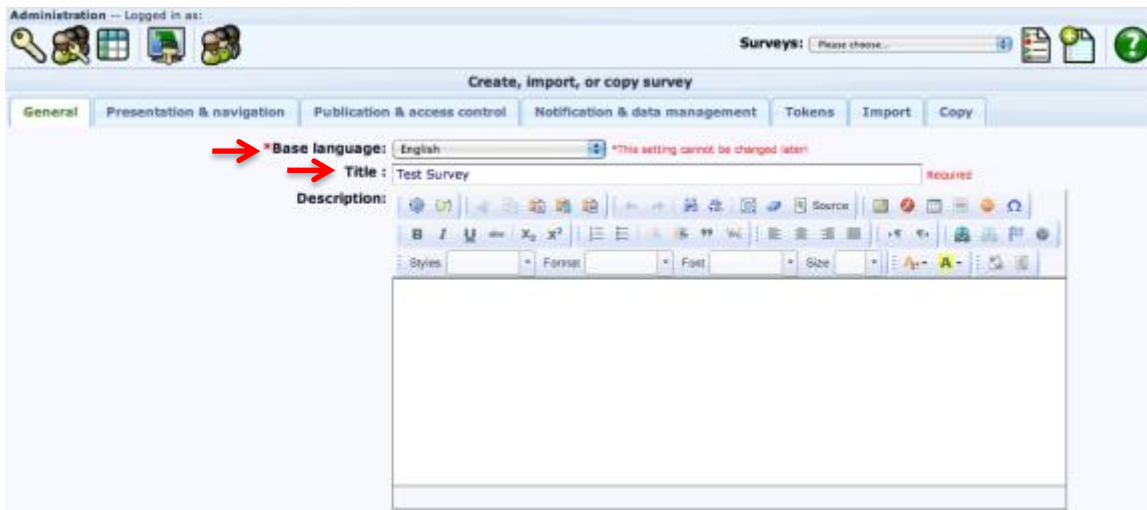
**\*Helpful Hints:** As you prepare your **Human Subjects Research** survey(s), it is recommended that you create the Informed Consent section first! Be aware, when testing your survey, the Informed Consent logic will only work when the survey is active. You may need to activate and deactivate your survey 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:

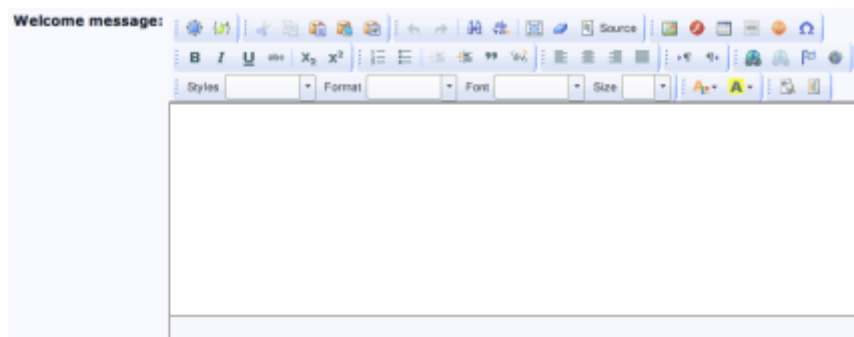
[https://manual.limesurvey.org/Survey\\_settings](https://manual.limesurvey.org/Survey_settings)

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



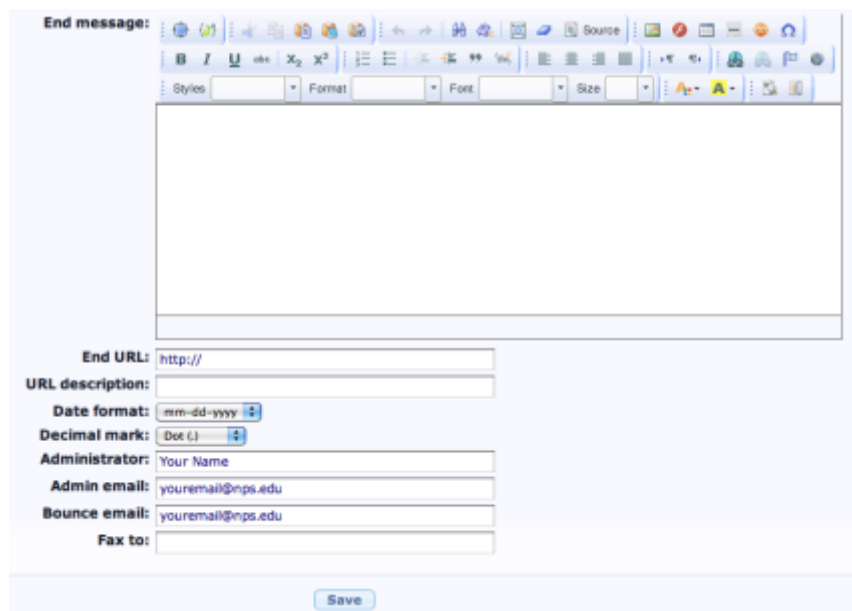
There are only two **required** fields for creating a survey, **Base Language** and **Title**. (Note: **Base Language** allows you to have multi-lingual surveys, but does not translate the survey text for you.) The **Description** field is a brief description of your survey. It is used in the system-generated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



The screenshot shows a web-based form for configuring the 'End message' of a survey. At the top, there is a large text area for the end message, preceded by the label 'End message:'. Above this text area is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, etc.), alignment, and list creation. Below the text area, there are several input fields: 'End URL:' with a text box containing 'http://', 'URL description:' with an empty text box, 'Date format:' with a dropdown menu showing 'mm-dd-yyyy', 'Decimal mark:' with a dropdown menu showing 'Dot (.)', 'Administrator:' with a text box containing 'Your Name', 'Admin email:' with a text box containing 'youremail@nps.edu', 'Bounce email:' with a text box containing 'youremail@nps.edu', and 'Fax to:' with an empty text box. At the bottom of the form is a 'Save' button.

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.

The screenshot shows the 'Presentation & navigation' tab in the LimeSurvey administration interface. At the top, there's a header with 'Administration -- Logged in as:' and a 'Surveys:' dropdown. Below this is a tab bar with 'General', 'Presentation & navigation' (selected), 'Publication & access control', 'Notification & data management', 'Tokens', 'Import', and 'Copy'. The main content area is titled 'Create, import, or copy survey'. It includes a 'Format:' dropdown set to 'Group by group' and a 'Template:' dropdown set to 'default'. Below these is a 'Template preview' showing a sample survey layout. The main section contains various settings with dropdown menus and checkboxes: 'Show welcome screen?' (Yes), 'Navigation delay (seconds):' (0), 'Show [<< Prev] button' (No), 'Show question index / allow jumping' (No), 'Keyboard-less operation' (No), 'Show progress bar' (Yes), 'Participants may print answers?' (No), 'Public statistics?' (No), 'Show graphs in public statistics?' (No), 'Automatically load URL when survey complete?' (No), 'Show "There are X questions in this survey"' (Yes), 'Show group name and/or group description' (Show both), 'Show question number and/or code' (Hide both), and 'Show "No answer"' (Yes). A 'Save' button is at the bottom.

**\*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.

The screenshot shows the 'Publication & access control' tab in the LimeSurvey administration interface. The header and tab bar are the same as the previous screenshot. The main content area is titled 'Create, import, or copy survey'. It includes a 'List survey publicly:' dropdown set to 'No', 'Start date/time:' and 'Expiry date/time:' text boxes, 'Set cookie to prevent repeated participation?' (No), and 'Use CAPTCHA for:' dropdown set to 'Registration / Save & load'. A 'Save' button is at the bottom.

**\*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.

The screenshot shows the 'Notification & data management' tab selected. The interface includes a top navigation bar with icons and a 'Surveys' dropdown menu. Below the navigation bar, there are tabs for 'General', 'Presentation & navigation', 'Publication & access control', 'Notification & data management' (active), 'Tokens', 'Import', and 'Copy'. The main content area contains several settings with dropdown menus:

- Send basic admin notification email to: [text input]
- Send detailed admin notification email to: [text input]
- Date stamp?: No
- Save IP address?: No
- Save referrer URL?: No
- Save timings?: No
- Enable assessment mode?: No
- Participant may save and resume later?: Yes
- Google Analytics API key for this survey: [text input]
- Google Analytics style for this survey: Do not use Google Analytics

A 'Save' button is located at the bottom right of the form.

**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.

The screenshot shows the 'Tokens' tab selected. The interface is similar to the previous one, with the 'Tokens' tab now active. The main content area contains several settings with dropdown menus:

- Anonymized responses?: No
- Allow editing responses after completion?: No
- Enable token-based response persistence?: No
- Allow public registration?: No
- Use HTML format for token emails?: Yes
- Send confirmation emails?: Yes
- Set token length to: 15

A 'Save' button is located at the bottom right of the form.



**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.

The screenshot shows the 'Import' tab in the LimeSurvey administration interface. At the top, there's a 'Surveys:' dropdown menu. Below it, a tab bar includes 'General', 'Presentation & navigation', 'Publication & access control', 'Notification & data management', 'Tokens', 'Import' (selected), and 'Copy'. The main area prompts the user to 'Select survey structure file (\*.lss, \*.csv, \*.txt) or survey archive (\*.lss):' with a 'Choose File' button and a 'no file selected' status. Below this, there's a checkbox for 'Convert resource links and INSERTANS fields?' which is checked. An 'Import survey' button is at the bottom.

**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.

The screenshot shows the 'Copy' tab in the LimeSurvey administration interface. The tab bar is the same as the previous screenshot, but the 'Copy' tab is selected. The main area prompts the user to 'Select survey to copy:' with a dropdown menu and a 'Required' label. Below this, there's a 'New survey title:' text input field, also labeled 'Required'. There are several checkboxes: 'Convert resource links and INSERTANS fields?' (checked), 'Exclude quotas?' (unchecked), 'Exclude survey permissions?' (unchecked), 'Exclude answers?' (unchecked), and 'Reset conditions/relevance?' (unchecked). A 'Copy survey' button is at the bottom.

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

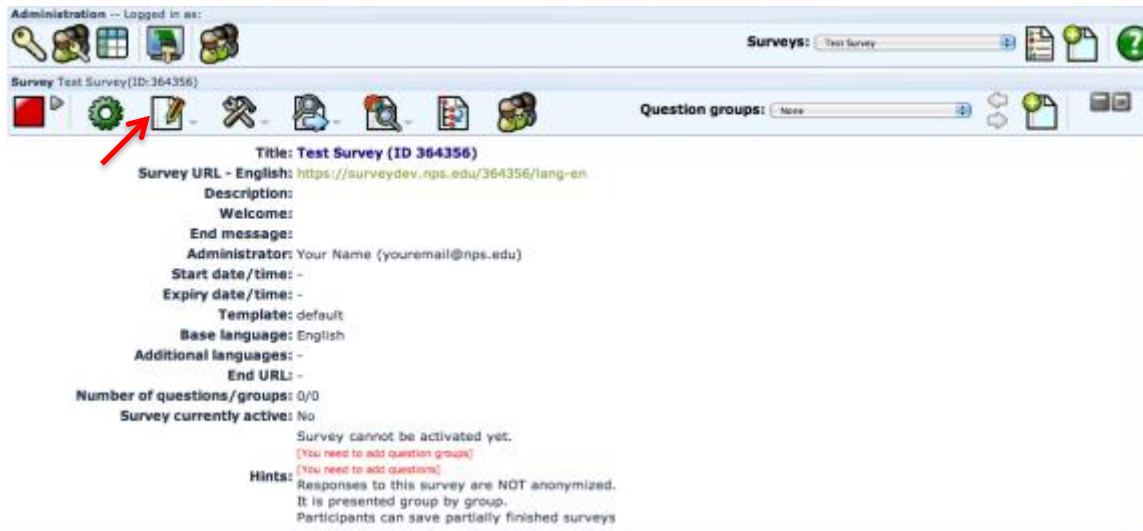
The screenshot shows the 'Test Survey' configuration page in the LimeSurvey administration interface. The top bar shows 'Administration -- Logged in as:'. Below it, a 'Surveys:' dropdown menu shows 'Test Survey'. The main area is titled 'Survey Test Survey(ID:364356)'. It displays various configuration details: 'Title: Test Survey (ID 364356)', 'Survey URL - English: https://surveydev.nps.edu/364356/lang-en', 'Description:', 'Welcome:', 'End message:', 'Administrator: Your Name (youremail@nps.edu)', 'Start date/time: -', 'Expiry date/time: -', 'Template: default', 'Base language: English', 'Additional languages: -', 'End URL: -', 'Number of questions/groups: 0/0', and 'Survey currently active: No'. A message states 'Survey cannot be activated yet. (You need to add question groups)'. A 'Hints' section notes that responses are NOT anonymized, it is presented group by group, and participants can save partially finished surveys.

**\*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.



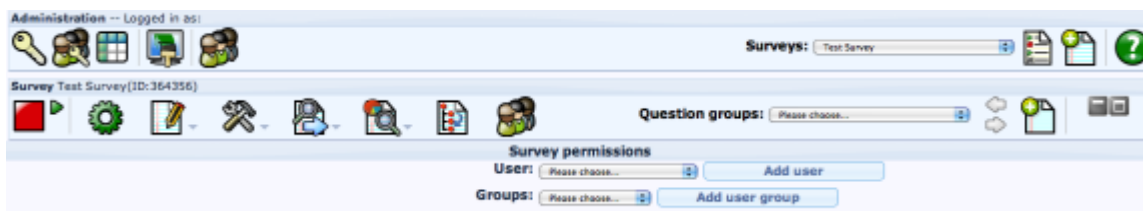
## ADDING OTHER USERS TO YOUR SURVEY

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.

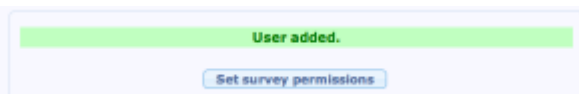


**\*Helpful Hints:** Each group member will need to have accounts added by the appropriate LimeSurvey administrator. If you have a large group of collaborators on your survey, please contact your administrator for assistance on creating a user group and then granting the group permission to access your 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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Quick translation	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
	Quotas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Responses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Statistics	<input type="checkbox"/>		<input type="checkbox"/>				
	Survey activation	<input type="checkbox"/>			<input type="checkbox"/>			
	Survey content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Survey deletion	<input type="checkbox"/>				<input type="checkbox"/>		
	Survey locale settings	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
	Survey security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Survey settings	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>			
	Tokens	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save now](#)

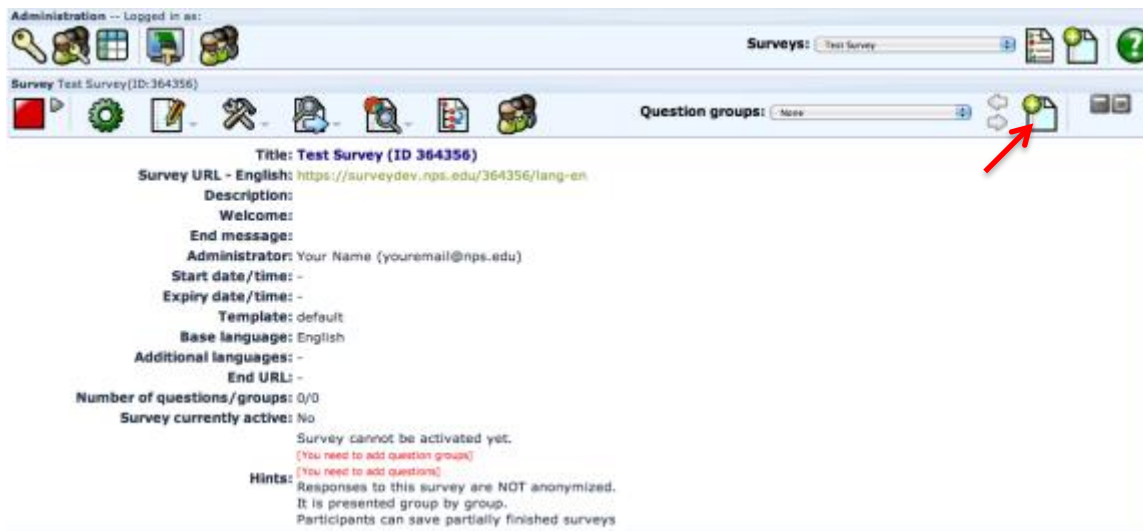
## QUESTION GROUPS

For more information on **Question Groups**, go to:

[https://manual.limesurvey.org/Creating\\_a\\_question\\_group](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 additional **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.

The screenshot shows the 'Add question group' form. At the top, there's a navigation bar with 'Administration -- Logged in as:' and a 'Surveys:' dropdown set to 'Test Survey'. Below this is a 'Survey Test Survey(ID:364356)' header with various icons. The main form has a 'Question groups:' dropdown set to 'Please choose...'. Below this is a tabbed interface with 'English(Base language)' and 'Import question group'. The 'Add question group' tab is active, showing a 'Title:' field with 'Test Question Group' (marked as 'Required') and a 'Description:' text area with a rich text editor toolbar. At the bottom, there are fields for 'Randomization group:' and 'Relevance equation:', and a 'Save question group' button.

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

The screenshot shows the 'Import question group' tab. It features a 'Select question group file (\*.lsg/\*.csv):' field with a 'Choose File' button and 'no file selected' text. Below this is a 'Convert resource links?' checkbox which is checked. An 'Import question group' button is at the bottom. A red arrow points to the 'Import question group' tab label.

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

The screenshot shows the survey administration tool after the question group has been added. The 'Question groups:' dropdown now shows 'Test Question Group'. Below this, a 'Questions:' dropdown is set to 'Please choose...'. The 'Test Question Group (ID:57)' is listed under the 'Question group' section. The 'Title: Test Question Group (57)' and 'Description:' fields are visible.

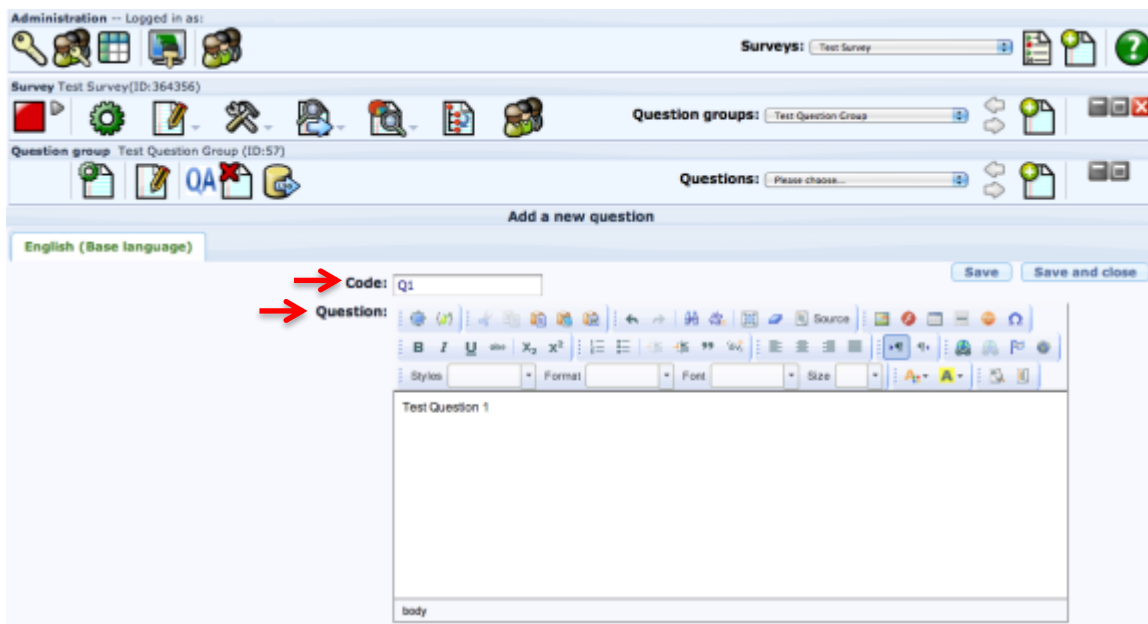
## QUESTION TYPES

For more information on **Question Types**, go to: [https://manual.limesurvey.org/Adding\\_a\\_question](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.

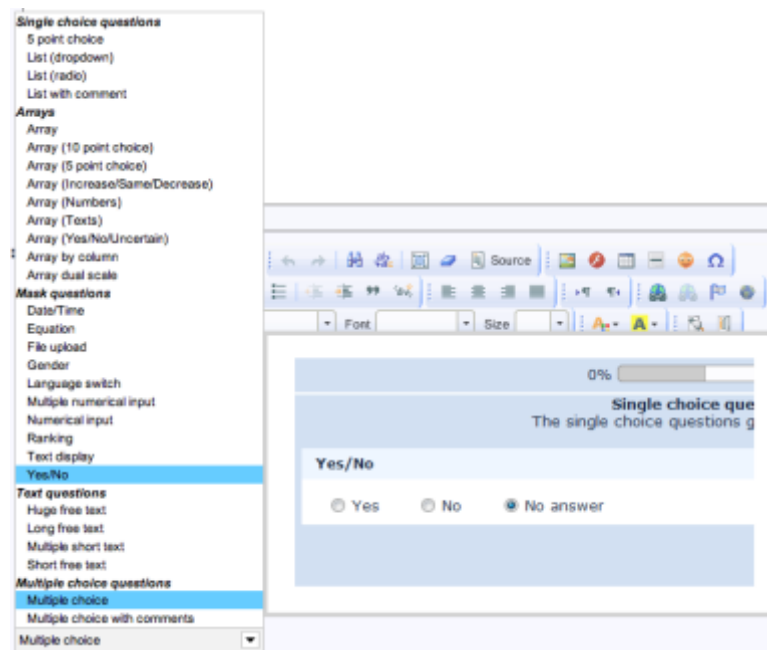


Enter any **Help** text that you would like to include for the question. The **Help Text** is visible to survey participants. Then choose the **Question Type** from the menu. If needed, you can change the **Question Group** in the next menu. For **Mandatory**, choose whether the question requires an 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.

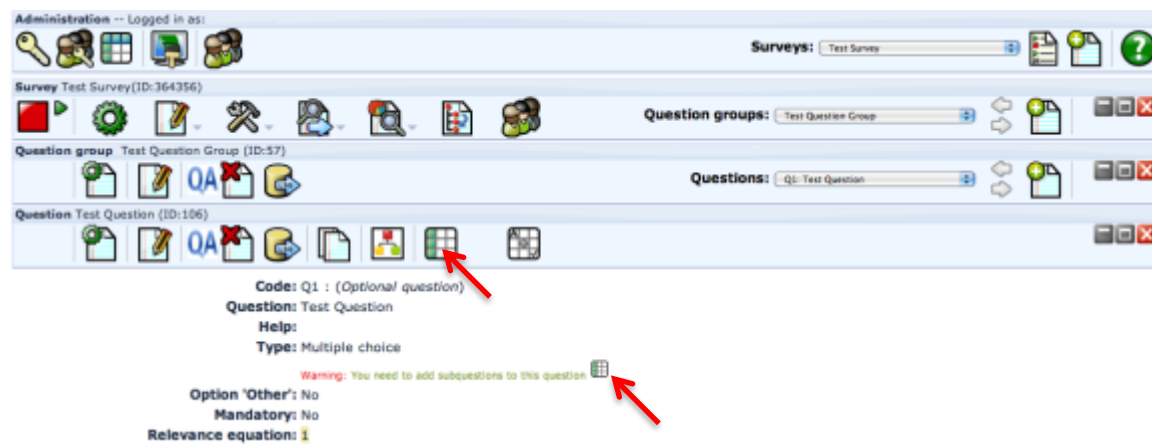
The screenshot shows a web-based question entry interface. At the top is a 'Help:' label followed by a rich text editor with a standard toolbar (bold, italic, underline, link, unlink, list, etc.). Below the editor are configuration fields: 'Question type:' with a dropdown menu set to 'Long free text'; 'Question group:' with a dropdown menu set to 'Test Question Group'; 'Mandatory:' with radio buttons for 'Yes' and 'No' (the 'No' button is selected); 'Relevance equation:' with an empty text input field; 'Validation:' with an empty text input field; and 'Position:' with a dropdown menu set to 'At end'. Below these fields is a link that says 'Show advanced settings'. At the bottom center is a blue button labeled 'Add question'.



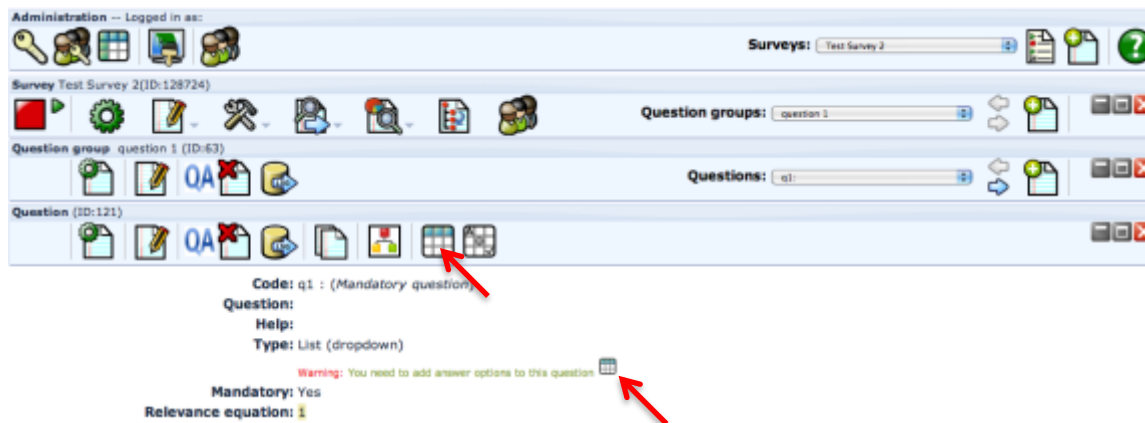
A list of all of the question types in LimeSurvey is shown below. When you hover over an option, a sample displays to the right of the menu. More information on how each question works can be found on the LimeSurvey site at: [https://manual.limesurvey.org/Question\\_types](https://manual.limesurvey.org/Question_types)



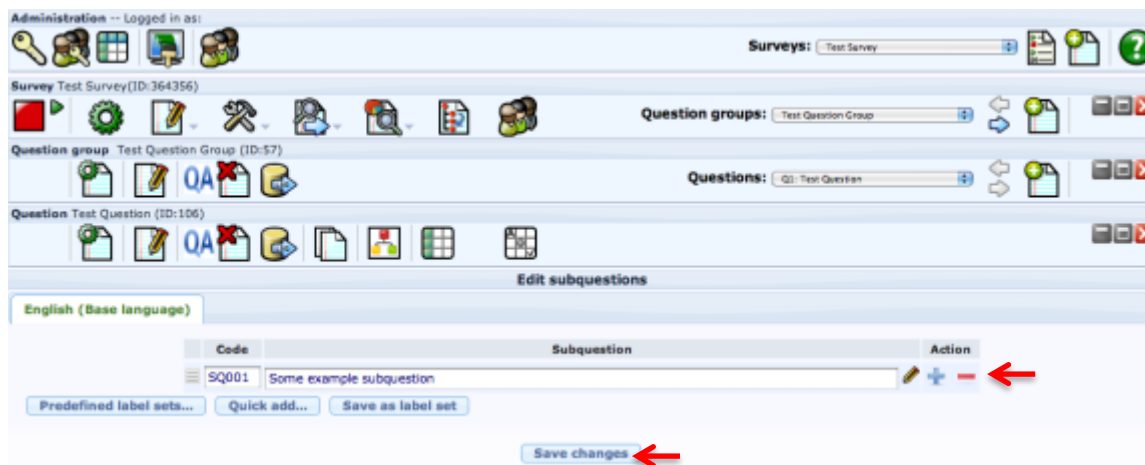
When done, click the **Add Question** or either of the **Save Buttons**. If you click **Add Question** or **Save and Close**, you should be redirected to the question screen. If not, navigate back to the question screen. For questions that require choice options, like Multiple Choice or Drop Down List,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




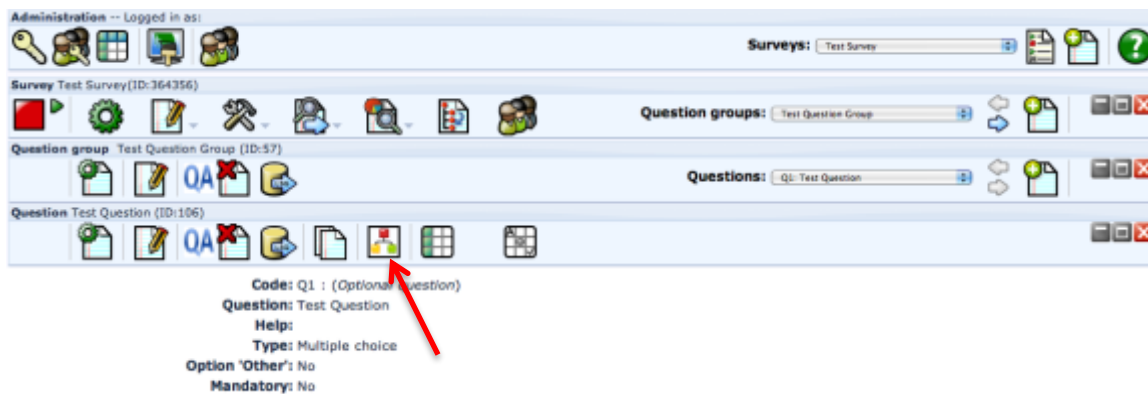
... or the **Edit Answer Options for This Question Buttons**.



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.



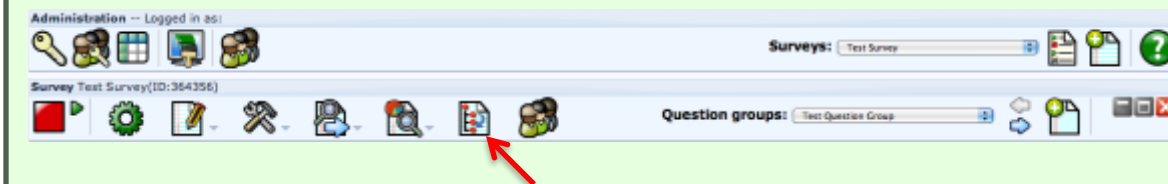
Branching logic can be added by clicking the **Set Conditions for this Question Button** . For more information and instructions on how to add branching logic, go to: [https://manual.limesurvey.org/Setting\\_conditions](https://manual.limesurvey.org/Setting_conditions)



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**.



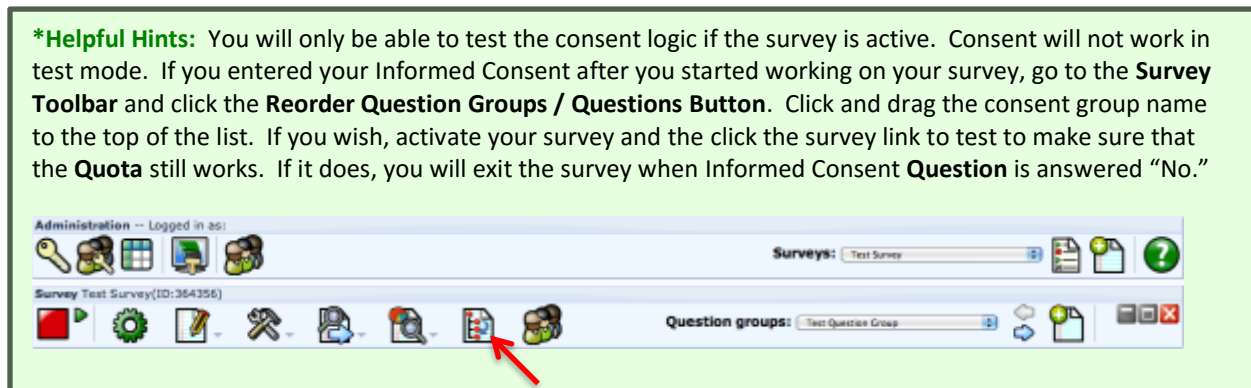
**\*Helpful Hints:** If you need to rearrange your **Questions** or **Question Groups**, use the **Reorder Question Groups / Questions Button** in the **Survey Toolbar**. You can click on the Group Name or the Question Name and drag to reorder.



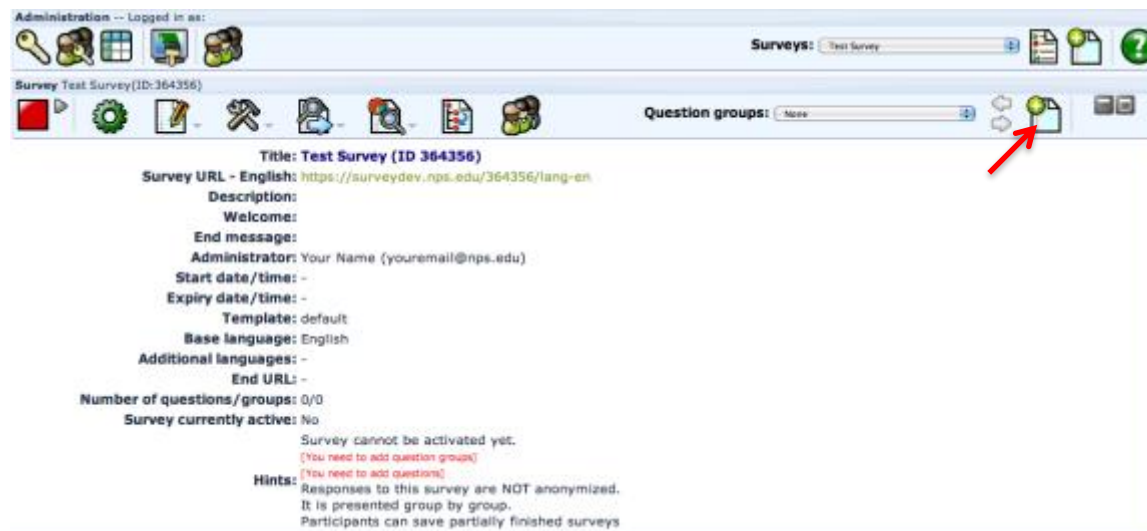
## INFORMED CONSENT & MAX RESPONSE LIMIT (*HUMAN SUBJECTS RESEARCH*)

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 then 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**.

The screenshot shows the 'Add question group' form in a survey administration interface. The 'Title' field is labeled 'Consent' and has a red 'Required' indicator. A red arrow points to this field. The 'Description' field is empty and has a rich text editor toolbar above it. Below the description field are fields for 'Randomization group' and 'Relevance equation'. At the bottom is a 'Save question group' button. The interface includes a top navigation bar with 'Administration -- Logged in as:' and a 'Surveys:' dropdown set to 'Test Survey'. A secondary bar shows 'Survey Test Survey(ID:364356)' and a 'Question groups:' dropdown set to 'Please choose...'. A tab labeled 'Add question group' is active, with sub-tabs for 'English(Base language)' and 'Import question group'.

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

This screenshot shows the same survey administration interface after a question group has been added. The 'Question groups:' dropdown now shows 'Consent'. Below it, a new 'Question group' entry is visible, titled 'Consent (ID:59)'. In the 'Questions:' dropdown, a red arrow points to a green plus icon, which is the 'Add New Question to Group Button'. The 'Title' and 'Description' fields for the new question are visible at the bottom of the screen.

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

Administration -- Logged in as: Surveys: Test Survey

Survey Test Survey (ID: 364356) Question groups: Consent Questions: Please choose...

English (Base language)

Code: 1

Question: Informed consent information entered here.

body

Save Save and close

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**.

Help:

Question type: Yes/No

Question group: Consent

Mandatory: Yes No

Relevance equation: 1

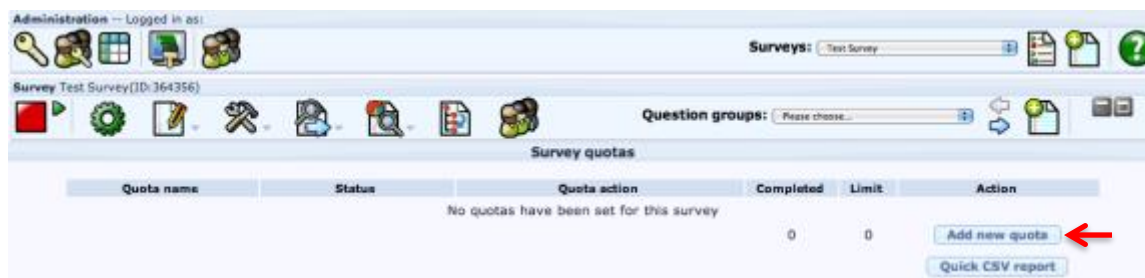
Show advanced settings

Add question

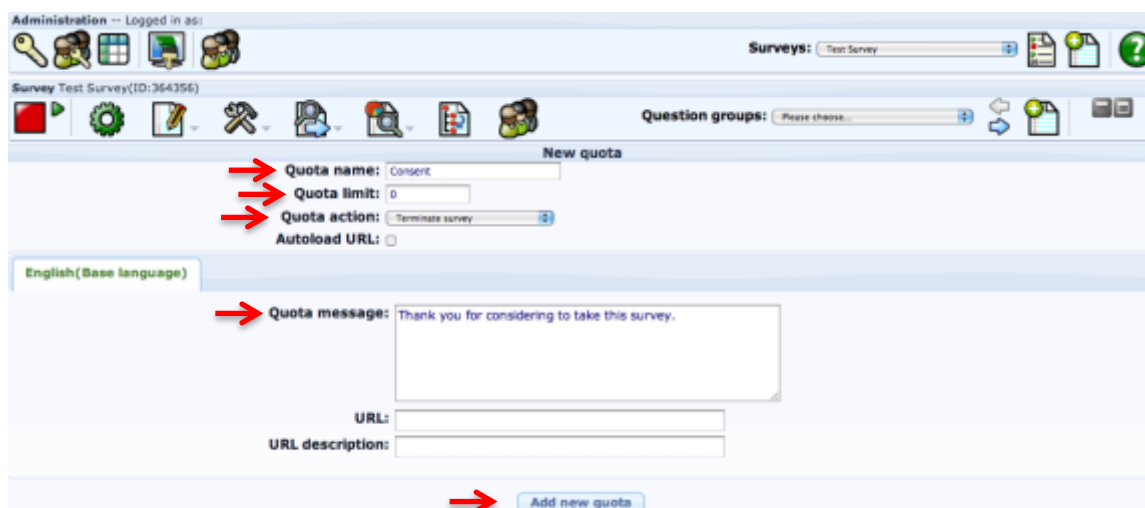
Next, go to **Survey Properties -> Quotas** to set the exit logic for a “No” response.



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**.

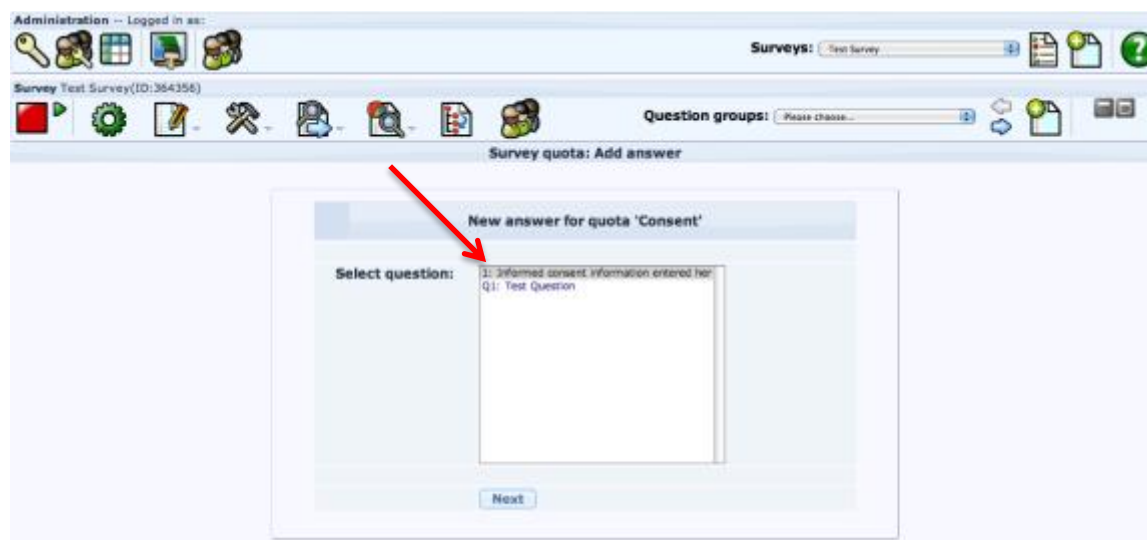


The screenshot shows the 'Survey quotas' management interface. At the top, there's a navigation bar with 'Administration -- Logged in as:' and a 'Surveys:' dropdown menu set to 'Test Survey'. Below this is a toolbar with various icons. The main section is titled 'Survey quotas' and contains a table with the following data:

Quota name	Status	Quota action	Completed	Limit	Action
Consent	Active	Terminate survey	N/A	0	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Add answer</a> <a href="#">Add new quota</a> <a href="#">Quick CSV report</a>
	Questions	Answers	0	0	

A red arrow points to the 'Add answer' button in the 'Action' column for the 'Consent' quota.

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



The screenshot shows the 'New answer for quota' dialog box. The title bar reads 'New answer for quota 'Consent''. Inside the dialog, there's a 'Select question:' label and a list box containing two items: '1: Informed consent information entered her' and 'Q1: Test Question'. A red arrow points to the first item in the list. At the bottom of the dialog is a 'Next' button.



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

Administration -- Logged in as: [User Icons]

Surveys: Test Survey

Survey Test Survey(ID:364356)

Question groups: Please choose...

Survey quota: Add answer

**New Answer for Quota "**

Select answer: yes  
No

Save this, then create another: ☐

Next

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.

Administration -- Logged in as: [User Icons]

Surveys: Test Survey

Survey Test Survey(ID:364356)

Question groups: Please choose...

Survey quotas

Quota name	Status	Quota action	Completed	Limit	Action				
Consent	Active	Terminate survey	N/A	0	<a href="#">Edit</a> <a href="#">Remove</a> <a href="#">Add answer</a> <a href="#">Remove</a> <a href="#">Add new quota</a> <a href="#">Quick CSV report</a>				
<p><b>Questions</b></p> <table border="1"> <thead> <tr> <th>Questions</th> <th>Answers</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>No</td> </tr> </tbody> </table>						Questions	Answers	1	No
Questions	Answers								
1	No								
			0	0					

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**.

Administration -- Logged in as:

Surveys: Test Survey

Survey Test Survey(ID:364356)

Question groups: Please choose...

**New quota**

Quota name: MaxAnswers

Quota limit: 120

Quota action: Terminate survey with warning

Autoload URL: ☐

English(Base language)

Quota message: Sorry your responses have exceeded a quota on this survey.

URL:

URL description:

Add new quota

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

Administration -- Logged in as:

Surveys: Test Survey

Survey Test Survey(ID:364356)

Question groups: Please choose...

**Survey quotas**

Quota name	Status	Quota action	Completed	Limit	Action
Consent	Active	Terminate survey	N/A	0	<a href="#">Edit</a> <a href="#">Remove</a>
Questions	Q3	Answers	No		<a href="#">Add answer</a> <a href="#">Remove</a>
MaxAnswers	Active	Terminate survey with warning	N/A	120	<a href="#">Edit</a> <a href="#">Remove</a>
Questions		Answers	0	120	<a href="#">Add answer</a> <a href="#">Add new quota</a> <a href="#">Quick CSV report</a>

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

The screenshot shows a software interface with a top navigation bar and a main content area. The top bar includes a 'Surveys' dropdown menu set to 'Test Survey' and a 'Question groups' dropdown set to 'Please choose...'. Below the top bar is a toolbar with various icons. The main content area displays a dialog box titled 'New answer for quota "MaxAnswers"'. Inside the dialog, there is a 'Select question:' label and a list box containing two items: '1: Informed consent information entered here' and 'Q1: Test Question'. A red arrow points from the 'Next' button at the bottom of the dialog to the first item in the list. The 'Next' button is a small blue button with the text 'Next'.

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).

The screenshot shows the same software interface as the previous one. The main content area displays a dialog box titled 'New answer for quota ""'. Inside the dialog, there is a 'Select answer:' label and a list box containing two items: 'Yes' and 'No'. A red arrow points from the 'Next' button at the bottom of the dialog to the 'Yes' item in the list. Below the list box, there is a checkbox labeled 'Save this, then create another:' which is currently unchecked. The 'Next' button is a small blue button with the text 'Next'.

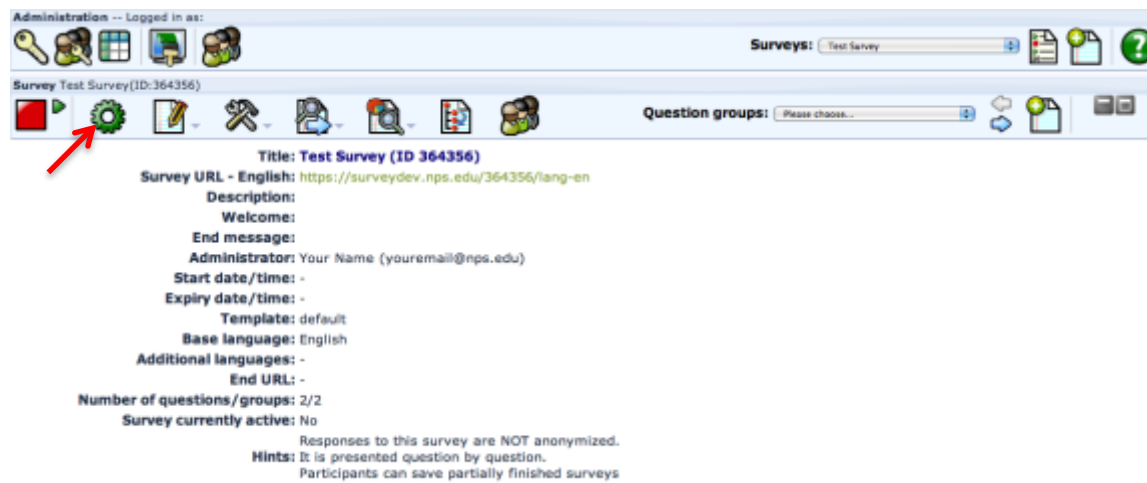
## PUBLISHING YOUR SURVEY

For more information about Managing Surveys go to:

[https://manual.limesurvey.org/Managing\\_Surveys](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**.

Administration -- Logged in as: [User Icons]

Surveys: Test Survey [Icons]

Survey Test Survey(ID:364356)

Question groups: Please choose... [Icons]

**Title: Test Survey (ID 364356)**

Survey URL - English: <https://surveydev.nps.edu/364356/lang-en>

Description:

Welcome:

End message:

Administrator: Your Name (youremail@nps.edu)

Start date/time: -

Expiry date/time: -

Template: default

Base language: English

Additional languages: -

End URL: -

Number of questions/groups: 2/2

Survey currently active: No

Responses to this survey are NOT anonymized.

Hints: It is presented question by question.  
Participants can save partially finished surveys

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.

Administration -- Logged in as: [User Icons]

Surveys: Test Survey [Icons]

Survey Test Survey(ID:364356)

Question groups: Please choose... [Icons]

**Activate survey(364356)**

**Warning**  
**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

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

Please check these settings now, then click the button below.

Anonymized responses? ☐ No ☐ Yes

Date stamp? ☐ No ☐ Yes

Save IP address? ☐ No ☐ Yes

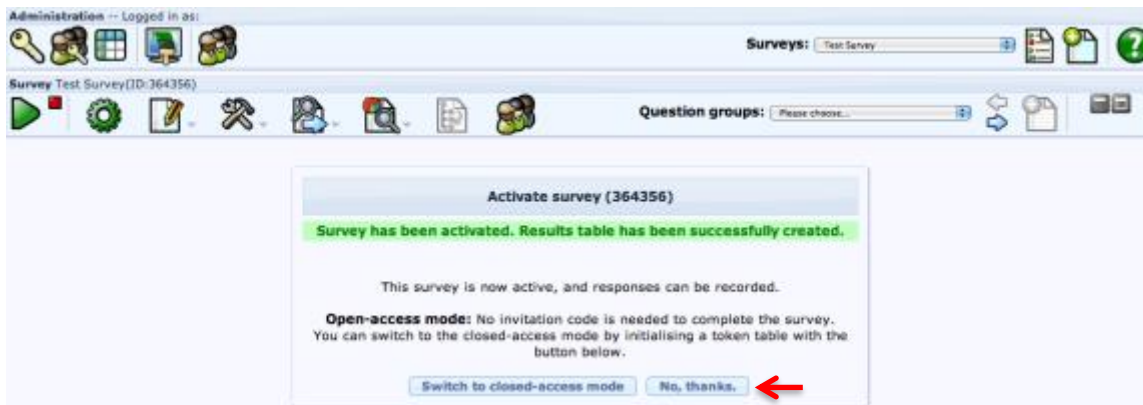
Save referrer URL? ☐ No ☐ Yes

Save timings? ☐ No ☐ Yes

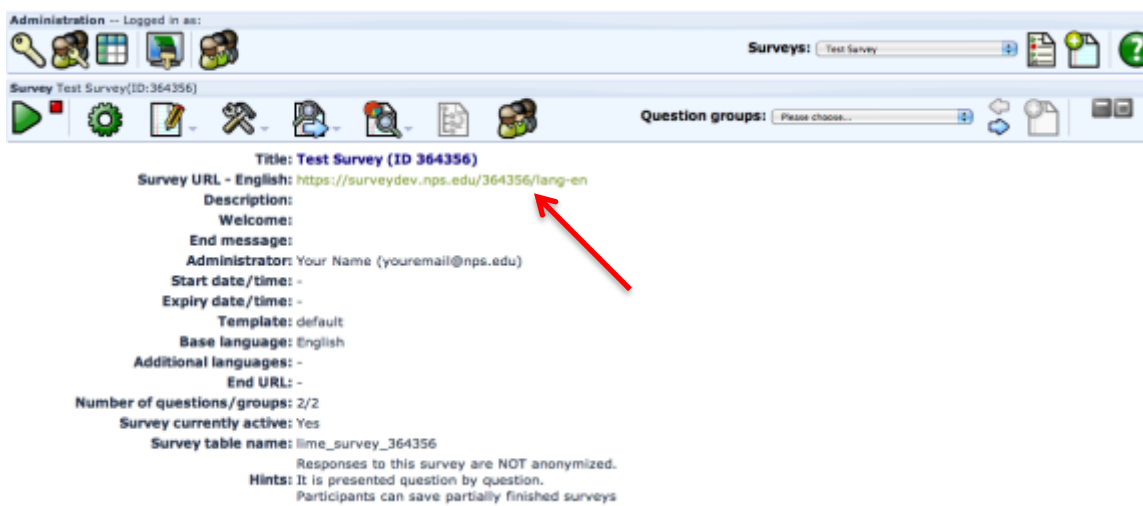
Please note that once responses have collected with this survey and you want to add or remove groups/questions or change one of the settings above, you will need to deactivate this survey, which will move all data that has already been entered into a separate archived table.

**Save / Activate survey**

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](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](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.

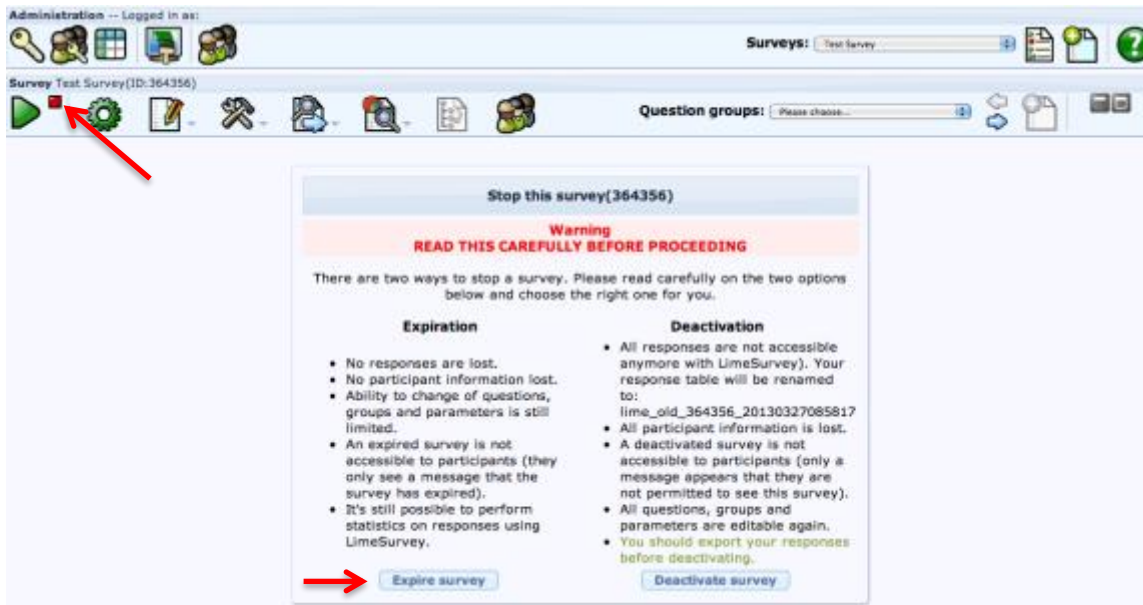
Administration -- Logged in as:

Surveys: Please choose...

Status	STD	Survey	Date created	Owner	Access	Anonymize responses	Full	Partial	Total	Tokens available	Response rate
Active					Open						
	36435	Test Survey	25.03.2013	(Edit)	Open	No	0		0		

Page 1 of 1 25 View 1 - 1 of 1

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.



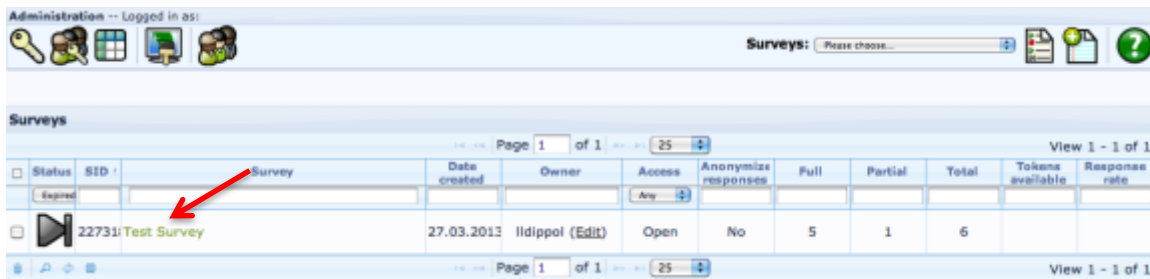


## ACCESSING YOUR RESULTS AND EXPORTING DATA

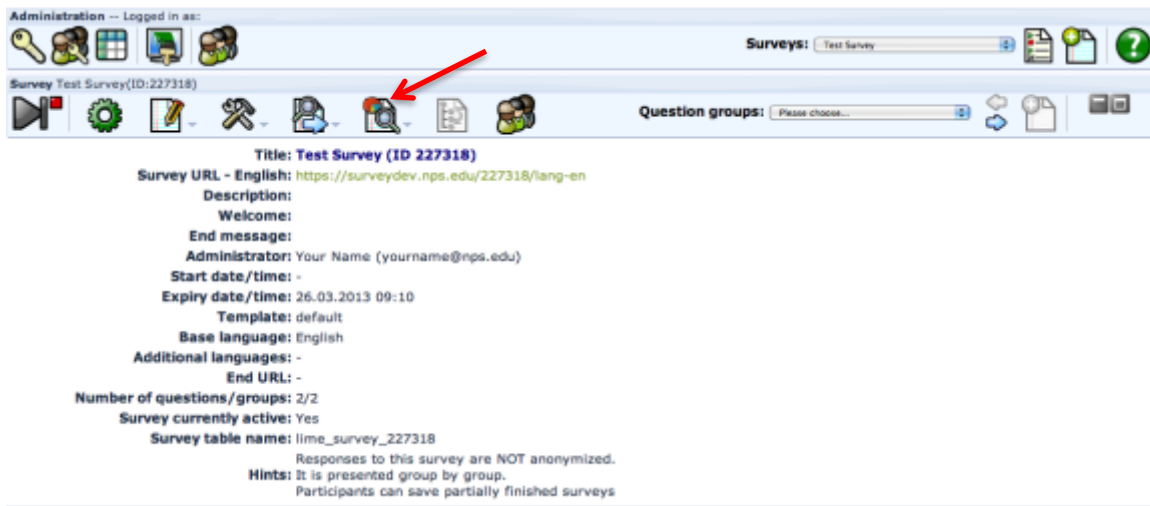
For more information about **Statistics**, go to: <https://manual.limesurvey.org/Statistics>

For more information about **Exporting Survey Results**, go to:  
[https://manual.limesurvey.org/Exporting\\_results](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.