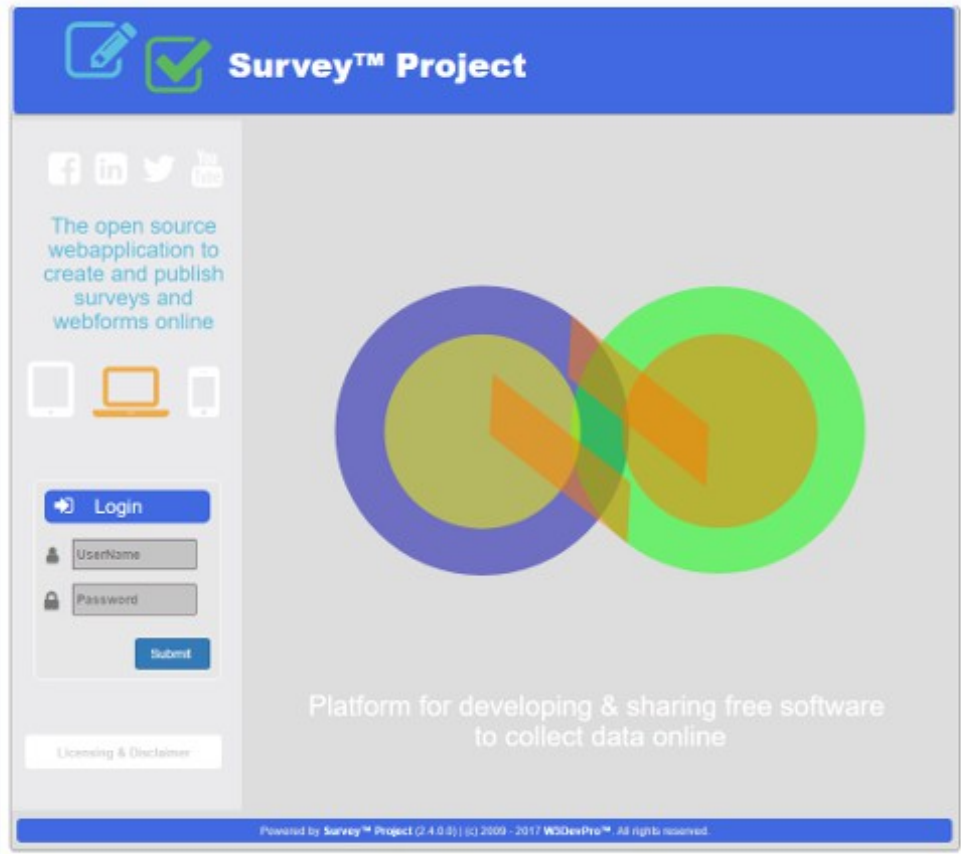*PLATFORM FOR DEVELOPING AND SHARING FREE SOFTWARE TO COLLECT DATA ONLINE*

Quickstart Guide
on how to
create & publish a survey

Survey™ Project End User Documentation

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Version: 1.0
Date: 2017-07-16

Content

Introduction

This quickstart guide applies to the use of the Survey™ Project v. 2.4 webapplication.

Survey™ Project is a free, open source webapplication to create, publish and administer surveys and webforms in an easy-to-use way without any restrictions or limitations on useage or features.

This guide is written for End Users of the SP™ webapplication who are authorised to create, edit and publicize surveys and webforms.

The instructions are limited to the basic features of SP™ to get started working with the application. More detailed information and instructions on other features are available from help sources that are listed in the *Further Reading and Links* section.

The SP™ 2.4 webapplication is not designed to be used on mobile devices or tablets/ Ipads: surveys and webforms can best be created on a PC or laptop. To answer and submit a survey other devices (mobile, tablet, pc etc) are supported as well.

Pre conditions

1- the Survey™ Project Webapplication has been installed on a webserver (*) and is accessible (URL) through the web with a webbrowser;

2- an SP™ User account (username/ password) has been created that is properly authorized (roles/ rolerights) to create, edit, publish surveys and have access to the results and reports;

Note: the default administrator account (admin) has complete access to all features.

If these conditions are not met contact the person or organisation reponsible for installing and administering the SP™ webapplication.

How to read and use this Guide

The quickest way to get started is to **follow the actions** in the order as described in this guide.

o **Actions** are written in the texboxes with a **BLUE** lining.

o **Screenprints** from SP™ v.2.4 are added to illustrate the intended action and result. Numbered **yellow** stars are added and referenced in the **Action** text to direct to the correct location.
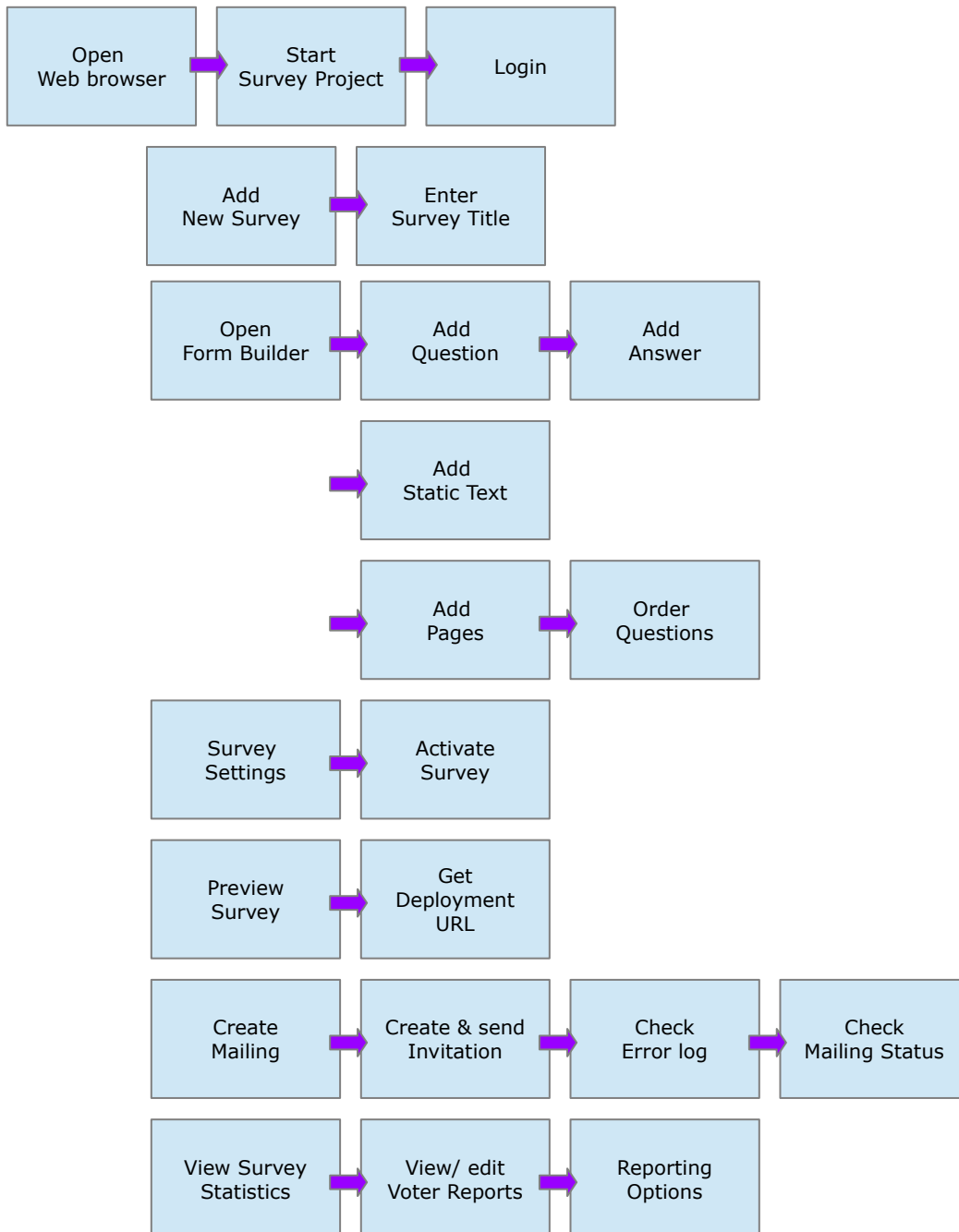
o **Notes** indicating additional advise or warnings are written in separate (pastel) textboxes

o **General information** and comments are written as regular text in **black**.

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*) This can also be locally (PC/ Laptop) or on a intra or internet server.

FLOWCHART

1. Start Survey Project and Login
2. Create a New Survey
3. Add Questions
4. Add Answers
5. Add Static Text
6. Order Questions and add Pages
7. Settings & Activation
8. Preview and URL
9. Publication
10. Mailing
11. Statistics, Results and Reports

```
┌──────────────┐    ┌──────────────┐    ┌──────────────┐
│    Open      │ →  │    Start     │ →  │    Login     │
│ Web browser  │    │Survey Project│    │              │
└──────────────┘    └──────────────┘    └──────────────┘

        ┌──────────────┐    ┌──────────────┐
        │    Add       │ →  │   Enter      │
        │ New Survey   │    │ Survey Title │
        └──────────────┘    └──────────────┘

┌──────────────┐    ┌──────────────┐    ┌──────────────┐
│    Open      │ →  │    Add       │ →  │    Add       │
│ Form Builder │    │  Question    │    │   Answer     │
└──────────────┘    └──────────────┘    └──────────────┘

              →  ┌──────────────┐
                 │    Add       │
                 │ Static Text  │
                 └──────────────┘

              →  ┌──────────────┐    ┌──────────────┐
                 │    Add       │ →  │    Order     │
                 │   Pages      │    │  Questions   │
                 └──────────────┘    └──────────────┘

┌──────────────┐    ┌──────────────┐
│   Survey     │ →  │  Activate    │
│  Settings    │    │   Survey     │
└──────────────┘    └──────────────┘

┌──────────────┐    ┌──────────────┐
│  Preview     │ →  │    Get       │
│  Survey      │    │ Deployment   │
│              │    │    URL       │
└──────────────┘    └──────────────┘

┌──────────────┐    ┌──────────────┐    ┌──────────────┐    ┌──────────────┐
│   Create     │ →  │ Create & send│ →  │   Check      │ →  │   Check      │
│  Mailing     │    │  Invitation  │    │  Error log   │    │Mailing Status│
└──────────────┘    └──────────────┘    └──────────────┘    └──────────────┘

┌──────────────┐    ┌──────────────┐    ┌──────────────┐
│ View Survey  │ →  │  View/ edit  │ →  │  Reporting   │
│  Statistics  │    │ Voter Reports│    │   Options    │
└──────────────┘    └──────────────┘    └──────────────┘
```

1. Accessing Survey Project

o An SP™ User account is needed to acces the webapplication. A default administrator account is created on installation. It will give access to all features. A restricted 'Survey Creator' account can be created in SP™.

Actions

1. Open a webbrowser (e.g. Chrome, Firefox, MS IE/ Edge)
2. Enter the URL (link) to the Survey™ Project website in the browser address bar [**-4**] and click enter

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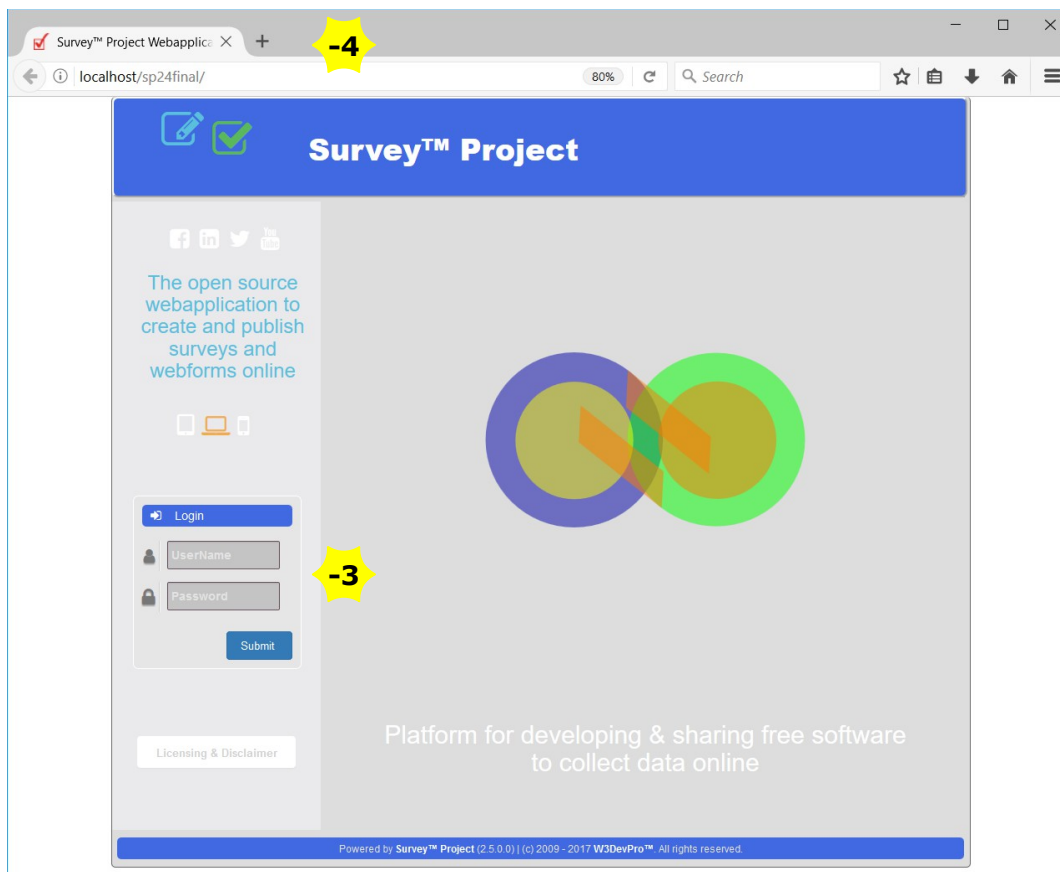
1. Starting page of the SP website to login

Actions

3. Enter the **username** and **password** of the SP™ account [**-3**] and click the **Submit** button to log in

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o Depending on the authorisations set for the account by the administrator more or less menu options will be available. Certain menu options may still be shown but are blocked: a warning message will appear if not properly authorized.
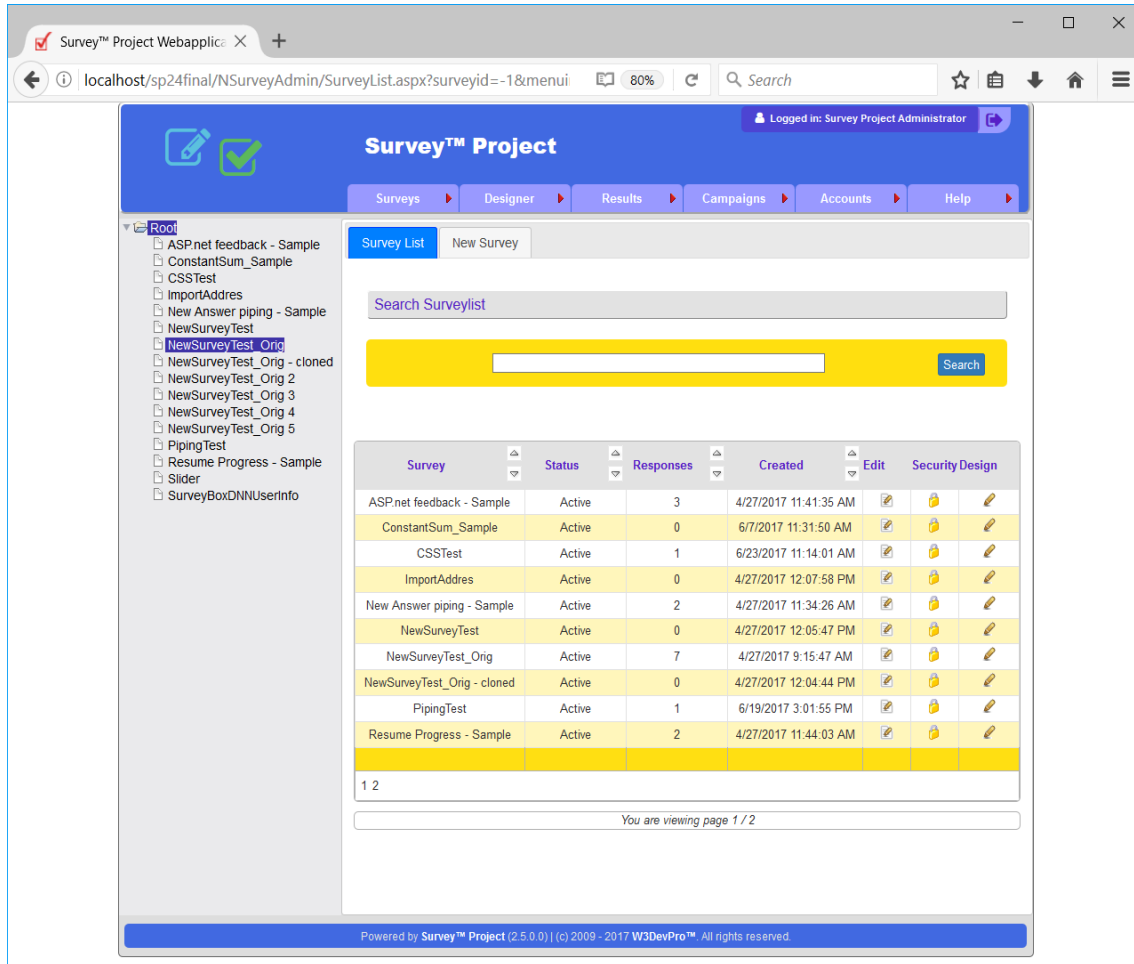
2. Opening page after login showing full (admin) access including already existing surveys.

2. Creating New Surveys

Actions

4. Go to menu **Surveys/ Survey New** or click the **New Survey** Tab [**-2**]

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3. New Survey Title entry field

o This is where a new survey is created or a previously exported surveyfile (xml) can be imported.

Actions

5. Enter a **Survey Title** in the text box [**-1**] and click the **'Create Survey'** button [**0**].

Note: When clicking the Title textbox a *pop-up* help text will appear explaining the use and working of the field. It can be clicked to close it.

The small question mark box in the right hand top corner of the page when clicked will lead to the SP helppage explaining the further use of the different options on the webpage.

Throughout SP™ pop-up helptexts and links to helppages are added.

o After clicking the Create Survey Button a new survey is added to the list of surveys in the directory on the left hand side of the page.
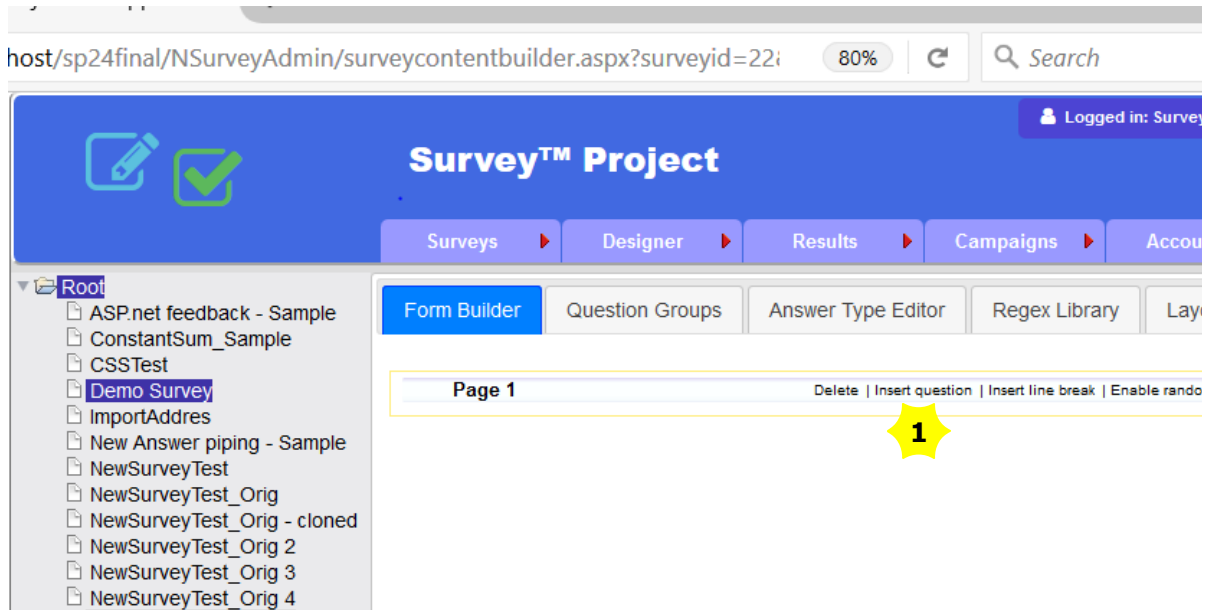
4. New survey automatically opened in Form Builder to start adding questions

o The title is marked blue indicating the 'selected' status of the survey. If no survey is selected a warning message will appear on opening most menu options.

o The survey is opened automatically in the Formbuilder showing a first (empty) page to start adding questions and answers.

3. Adding Questions

Actions

6. Click the "**Insert Question**" text link [**1**] in the '*Page 1*' menu bar to add a new question.

New question

ID	

Question :

Type ⭐**2** Single question ⌄

5. Question Editor on adding a new question

o The Question Editor opens. Different settings and selection options will show depending on the choices made.

o E.g. Importing questions through XML or adding questions from other surveys or question libraries. Detailed instructions can be found in the SP™ Helpfiles

o To add new questions only a few choices have to be made.

Actions

7. Select the "**Type**" – **Single Question**- from the Drop Downl List (DDL) [**2**]
8. Enter a question text in the Html/Text **Editor**
9. Click the "**Add new Question/ Text**" button

o The page will refresh after which many new options are shown [*picture 6.*].

o The 'Selection Mode' DDL is important in case of creating 'selection' type questions including checkbox, radiobutton or dropdownlist options.

Help Text:	Please enter your first name only.
Show Help Text:	☑ [3]
Selection mode :	Radiobutton (single) ⌄
Display mode :	Vertical ⌄
Number of columns :	None ⌄
Randomize answers order :	☐
Rating :	☐
Min. selections required :	None ⌄
Max. selections allowed :	Unlimited ⌄
Pipe alias :	

Export XML   Add / Edit answers   Update [4]

6. Question Editor settings and selection options

o Other options are used to determine layout or rating or mandatory answering etcetera.

Actions

10. Type a '**Help Text**' in the textbox [**3**] to assist repondents on answering/understanding the question.
11. Click the '**Show Help Text**' checkbox [**3**] to activate the helptext on the survey form
12. Click the '**Update**' button [**4**] to save the results and check the **confirmation messsage**

4. Adding Answers

Actions

13. Click the '**Add/ Edit Answers**' button [**4**] to open the **Answer Editor**.

o The Answer Editor is used to add/ edit answers to a question.
o Different answertypes can be chosen from a dropdownlist.
o Different answertypes can be combined on one and the same question.
o There is no limit to the number of answers/ answertypes that can be added to a question.

Actions

14. Click the '**Add new Answer**' button' [**5**].

7. Answer Editor on adding first answer

Actions

15. From the '**Type**' dropdownlist [**6**] select the **Field-Basic** option
16. Enter the **Answer Text** (e.g. 'My first name is')
17. Click the **Mandatory** checkbox to enforce entering an answer.
18. Click the **Add** button [7] to add the answer to the question

o Other Answer options are available that may differ per answer type.
o Specific options become visible after selecting an answer from the 'Type' dropdownlist
o Detailed information per answertype can be found in the Helpfiles (menu Help/ Helpfiles)

o A *Basic- Field* answer type renders a textbox of limited lenght to the respondent to enter free text (not limited).

o If the *Mandatory* option is checked it will not be possible to continue to the next page or submit a survey before an answer is entered.

Add new answer

Type :	Field - Basic
ID :	
Alias :	
Answer text :	My first name is:
Image URL :	
Default text value*	
RegEx server side validation :	No validation
Mandatory :	☑
Pipe alias	

7

Cancel Add

*you can specify special values that will be replaced at runtime into the text value :
##yourquerystringvariablename##

8. Answer settings on a Field-Basic answertype

Actions

19. Click the **Round Green Arrow** button (top left) **[8]** to go back to the Question in the Form Builder.

| Form Builder | Question Groups | Answer Type Editor | Regex Library |

◉ **8**

Question's answers editor

| Display answers of : | What is your name? |

9. Answer Editor Return Button to Question on Form Builder

5. Adding Static Text

o 'Static Text' is used to add general (free text) introductions, explanations, messages or comments to the survey.
o It can be added before or after any question.
o Both its content and layout can be created and edited with the Html/Text editor.

Actions

20. Click the '**Insert Question**' text link [**1**] in the blue Question menu bar to add a 'Static Text Question'
21. Select '**Type**' named **Static Free Text** from the dropdownlist [**2**]
22. Enter text in the Html/Text **Editor** including some layout (font, colors etc.)
23. Click the **Add new Question/ Text** button [**9**] to save the results and return to the Form Builder.

---

o To edit the Static Text once created click the Edit Question textlink to (re)open the Html/Text editor.

Note: On the Form Builder there are two text link options to Insert a new Question
a. Page menu bar (white): adds a question to the bottom of the current page
b. Question menu bar (blue): adds a question following the current question

---

10. Static Free Text "Question"

6. Paging and ordering Questions

o The result of the previous actions on the Form Builder should look like:

11. FormBuilder Result after adding two Questions

Actions

24. Click the **Green Up Arrow** [**10**]on the Static Text menu bar (blue) to move it to the top of the page.
25. Click the '**Insert Page Break**' [**11**]on the Static Text menu bar (blue) to add a second page

o To switch the order of pages (including questions) added the green Up and brown Down arrows on the Page menu bar must be clicked.

o To move a Question from one page to the other click the Up or Down arrows on the question menu bar (blue) untill it has reached the proper position.

Note: If there is only one question (or Static Text) on a page that is moved to another page (before or after) the 'original' page will no longer exist because there can be no 'empty' pages (without questions).

Similarly it is not possible to add a new (empty) page after the last question on the Form Builder.

o The result of the previous actions (24, 25) on the Form Builder should look like:

12. FormBuilder Result after switching order and adding page

7. Survey Settings & Activating

o General survey settings (e.g. start/enddate, paging options) can be edited through the Settings page.

Actions

26. Go to menu **Survey/ Settings/ Survey Settings** to open the Settings page.
27. Click the '**Active**' checkbox [**12**] to activate the survey for publication.
28. Click the '**Previous/ Next page Navigation**' checkbox to allow paging back and forth.
29. Click the '**Apply Changes**' button at the bottom of the page to save the changes.
30. Check the (green) **confirmation message** [**13**] at the top of the page.

13. Survey Settings including confirmation message

o The 'Default Survey' checkbox is used to set one particular survey as 'selected by default'.

On entering SP™ or on opening any menu option the 'Default Survey' will be selected in the directory list as the survey to work on.

Only one survey at a time can be selected as Default Survey. If no Default Survey is set and no survey is selected in the directory list a warning message is shown on opening certain menu options.

8. Preview

o To test or check the (in between) results (look and feel, design etc) of a survey that is being created there are two options:

a. Menu Campaigns/ Preview
b. Menu Campaigns/Web/ - Deployment URL

Preview Option
This will present the survey as shown to respondents when logged in to SP™ with a user account to 'take' the survey (menu Campaigns/ Take Survey).

Deployment URL Option
When the URL is clicked it will open the survey in a new browser window and present it as respondents will see the survey when invited by mail (Menu Campaigns/ Mailing) or through sharing the url/ link to the survey otherwise.

Actions

31. Go to menu **Campaigns/ Web** and click the **Deployment URL** to open in a new browser window [**14**]
32. Check the **Survey** result and go back to the **Form Builder** to make an adjustment
33. Go back to the Survey window and click **F5** to refresh the page and check the changes.

---
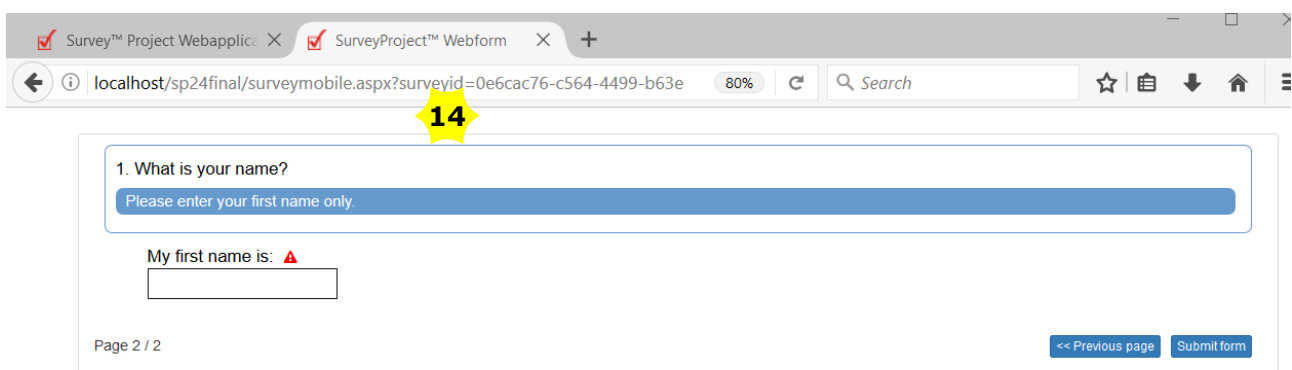
14. Survey result – page 2 - opened by Deployment URL

Note: When opening the survey through the Deployment URL a warning message is shown when the Survey is not set to '*Active*' (menu Survey/ Settings).

---
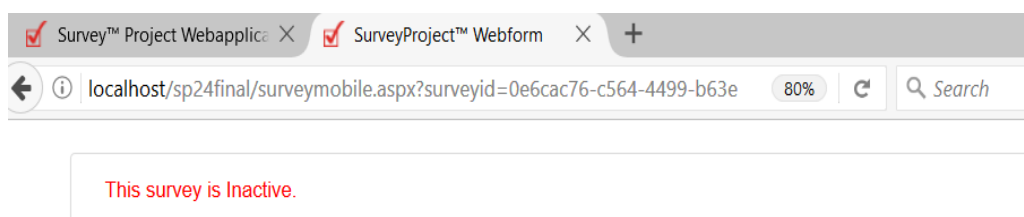
15. Survey Warning Message when not activated

9. Publication

o There are different options to 'publicize' a survey and make it accessible to respondents:

- create user accounts in SP™ for respondents to log in and 'take' one or more surveys;
- share the Deployment URL of the survey through another website, by mail, social media etc.
- invite respondents through the Campaigns/ Mailing menu which will send an email including the URL

Security, registration or traceability requirements determine what options are chosen or combined.

Actions

34. Go to menu **Campaigns/ Web** to find the URL (link) to the survey
35. Click the **Deployment URL** link [**15**] or copy and past it in the browser address bar to open the survey
36. Type a **Friendly Name** for the survey and click the **Save** button [**16**]
37. Click the '**Friendly Name**' URL (link) [**17**] to open the survey in a new browser window.

---

16. Survey URL options for publication

Note: The *Friendly Name* replaces the unique surveyid GUID in the Deployment URL to make it easier to read and share.

Make sure the Friendly Name is unique (SP™ does not yet enforce this) to avoid conflicting survey links.

---

10. Mailing

o Instead of publicly distributing the survey Deployment URL it is alo possible to make use of the SP™ mailing features to send invitiations to respondents in a more contolled and registered way.

Actions

38. Go to menu *Campaigns/ Mailing* to send an invitation message including the survey URL [**18**]
39. Enter or edit the (pre filled) *From Email, From Name, Subject* [**19**] and *Message*
40. Add one or more (comma separated) **email addresses** to the Invitiation list
41. Click the '**Send Invitation**' button and wait for the **confirmation screen** to appear.

---

17. Mailing Form including default message

Note: To make use of the mailing features of SP™ the SMTP settings in the web.config file have to be set correctly on installation. In case of mailing errors check these settings first.

From Email
- The registered email address of the SP™ Useracccount that is logged in to send the Mailing is automatically used to fill the 'From Email' field. It can be replaced or changed manually.
- If no email addres is set for the SP™ Useraccount the field is left blanc and must be filled manually.
- If the *From Email* field is left empty an error will be logged (mailing errorlog) and no mails are sent.

Default Message Survey URL and Invitation Code
The final version of both theSurvey URL and Invitationcode are set on sending the invitation message. Any changes to them while editing the message could make them invalid.

Actions

42. Wait for the **Confirmation** message to appear at the end of sending the Invitations
43. Go to menu **Campaigns/Mailing Errorlog** to check for (technical) mailing errors
44. Go to menu **Campaigns/ Mailing Status** to check for pending emails (sent correctly).

Note: Before sending a bulk mailing try sending an invitation to one mailbox to test both mailing settings and the working of the survey url and invitationcode .

11. Statistics, Results & Reports

o Once a survey has been answered and submitted by one or more respondents the individual results can be viewed and edited. Reporting options are available to present the overall results in a visually attractive way.

| Results | Filters | File Manager | Data Export | Data Import |

Survey results

Graphical Reports	●
Voter Reports	**20** ○
Cross Tabulation Reports	○
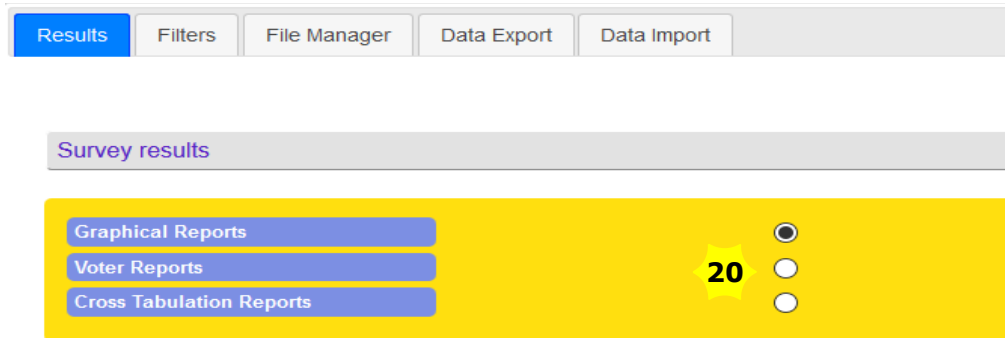
18. Results & Reporting options opening page

Actions

45. Go to menu *Results/ Reports* to access the different reporting options.
46. Click the *Voter Reports* radio button [**20**] to open a list of all submissions received
47. Click the *Details* icon [**21**] (looking glass) to open the '**Voter Report**' [**22**] of the individual repondent

---

Field entries report - Page 1 / 1

Graphical Reports	○
Voter Reports	●
Cross Tabulation Reports	○

Details	Delete	VoterID	Date	My first name is:
🔍	✗	26	7/11/2017	
21				

<< Previous page   Next page >>
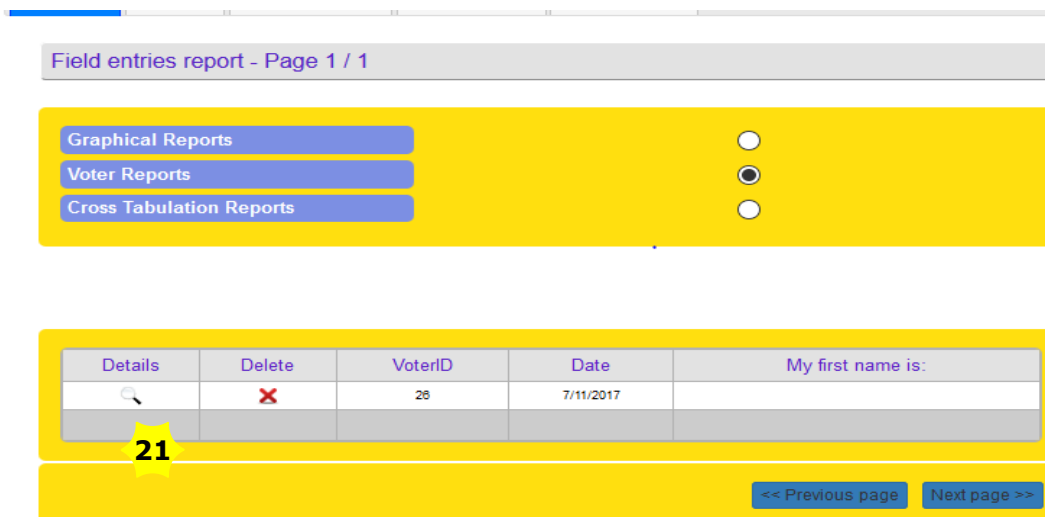
19. Voter Report List of Survey Submissions

Note: Answers submitted by a respondent can be edited through the *Voter Report* by clicking the 'Switch to Voters Answers Edit Mode' button.

General (meta) information on taking the survey is presented at the top of the page.

Voter Report

22

Voter information

Voter DB ID :	26
SP Username:	Disabled
Voter's Email :	Anonymous
Voter's language :	Default language
IP address :	::1
Vote recorded on :	7/11/2017 3:12:54 PM
Time to take the survey :	0 minutes, 10 secs.

Switch to voter's answers edit mode

Survey answers

What is your name?
T My first name is: :
Not answered

20. Voter Report including meta data and edit option

o Generic information and statistics on the overall results of a survey is available through the Statistics page

---

Actions

48. Go to menu **Surveys/ Statistics** [**23**] to access generic information on the survey.

Note: To '*reset*' a survey - i.e. delete/ remove all submissions (answers /responses) - the 'Reset Votes' button can be clicked.

Once reset data cannot be recovered.

'Unvalidated entries' can be removed by clicking the 'Delete Unvalidated' button: incomplete answering results from temporarily saved surveys will be deleted.

Survey statistics **23**

Creation date :	7/11/2017 11:22:16 AM
Last entry on :	7/11/2017 3:12:55 PM
Display times :	10
Number of voters :	1
Unvalidated progress entries :	0

Delete Unvalidated

Monthly stats :

Jun			July 2017			Aug
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11 1 entries	12	13	14	15

21. Statistics page including reset and delete options

o Graphical reporting options are available to present the survey results of **non-textual answers** e.g. Radiobutton and Checkbox answers.

o In case of (free) text only answers the Voter Report is used.

Note: To create a *non-textual* Answer open the Formbuilder, click the Edit Answers text link to open the Answer Editor. Add two other Answers of Answer Type: Selection Text. Answer Text: True, Not True.

See Chapter 4 Adding Answers, Actions 13 – 19

Actions

49. Go to menu ***Results/ Reports*** to open the Graphical Reporting options page.
50. Select a question [**24**] from the 'Question's Results to Display' – dropdownlist e.g. 'What is your name?'

| Question's results to display | **24** | [Select a question] ⌄ |
Results layout :		Column chart ⌄ 3D ⌄
Results order :		Answer order ⌄
Date range :		[____] to [____] Apply range
Apply a filter :		[Select a filter] ⌄
Click here to edit / create new filters		

33. Graphical Reports selection and options screen

o As soon as a question is selected from the DDL the page starts generating the graphical report based on the default settings of layout and order.

o Settings can be adjusted before selecting a question or after to make changes to the type of report required.

What is your name?

0 %   0 %

True (0)   Not True (0)   3

Demo Survey
▇ Results   Total of votes : 0
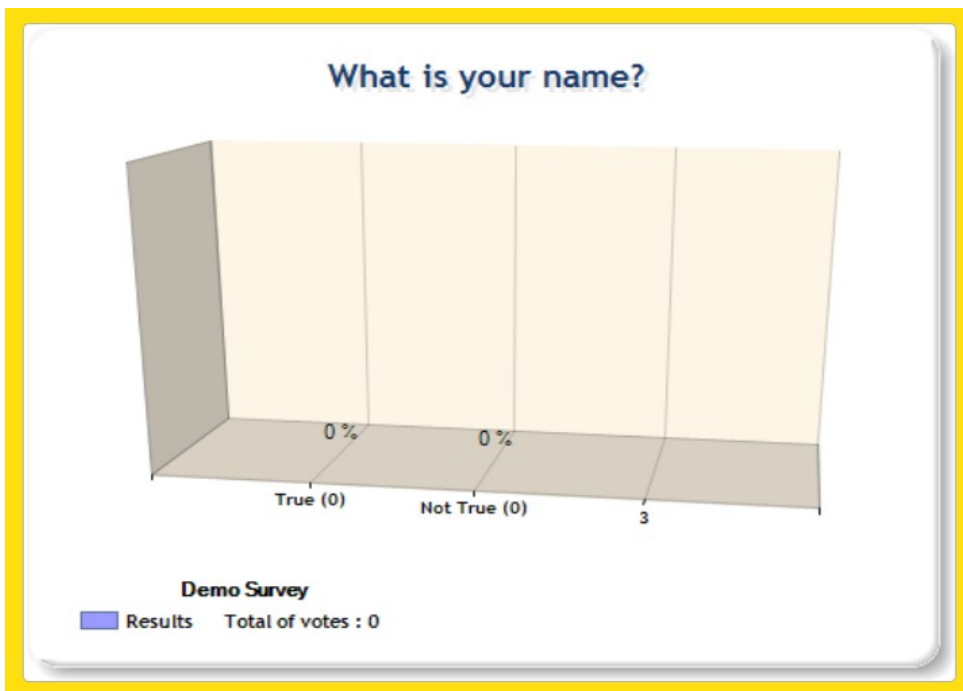
33. Empty 3D Column Chart Report

Note: By answering and submitting the survey one or more times results (votes) will be generated that are shown on the report. An empty report is shown in case of 0 votes.

APPENDIX

Major features and subject matter not covered in this Quick Start Guide:

- Security Settings

- Multilanguage Options

- Layout & Design

- Import/ Export Options

- User Management

- Using Question Libaries

- Adding Answer Types

- Using Regular Expressions

- Completion message and Results Report

Separate manuals or helpfiles on these subjects will be published or are available through SP™ or the SP™ community site.

Further Reading & Links

Available Help Sources

The first integrated helpfiles were added to version 2.0 of the Survey™ Project webapplication:

o An index of helpfiles is available at menu Help/ Helpfiles.
o Tooltip helptexts can be found on several webpages of the SP tool.

- Some of these Helpfiles have been published on the Survey Wiki of the Community website also.

- Through the Articles Menu of the Survey™ Project Community site additional articles can be found based on specific Survey related issues and themes

http://www.surveyproject.org/Support/Helpfiles/Articles/tabid/194/Default.aspx

- At the Survey™ Project YouTube Channel subtitled movies can be found with basic instructions on several subjects: https://www.youtube.com/user/TheSurveyProject

- Technical information can be found at
o the former Survey Sourcecode website at http://survey.codeplex.com
o the new site at https://www.github.com/surveyproject

- Visit the Forums section of the Community website to ask any questions
http://www.surveyproject.org/Forums/tabid/107/Default.aspx

Contributions to the projects documentation and helpfiles are most welcome. If you have any experience in this field or if you feel like joining the team please let us know: mail@surveyproject.org

Survey™ Project

http://www.surveyproject.org/ - SP™ Community site & Forums

http://www.surveyproject.biz – SP™ Business Services

http://www.surveyproject.net/ - SP™ Test & Demo site

https://www.github.com/surveyproject/ - Downloads, Releases, Sources, Development

SurveyBox DNN® module

https://github.com/surveyproject/surveybox – Downloads, Releases, Sources, Development