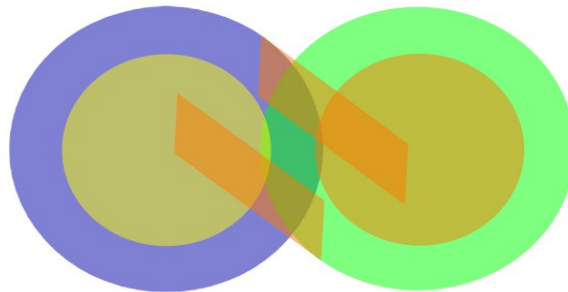
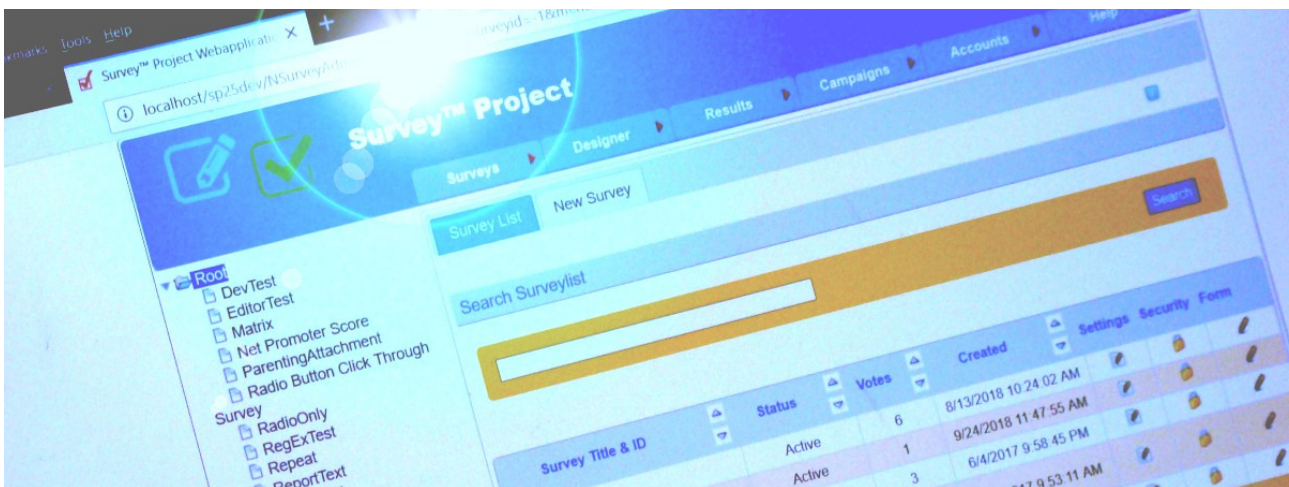


PLATFORM FOR DEVELOPING AND SHARING FREE SOFTWARE TO COLLECT DATA ONLINE



## Quickstart Guide on how to create & publish a survey



### Survey™ Project End User Documentation

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## Introduction

This quickstart guide applies to the use of the Survey™ Project v. 2.5 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™ 2.5 webapplication is not designed to be used on mobile devices or tablets/ lpads: 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/ rolerrights) 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 responsible 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 and 2.5 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.

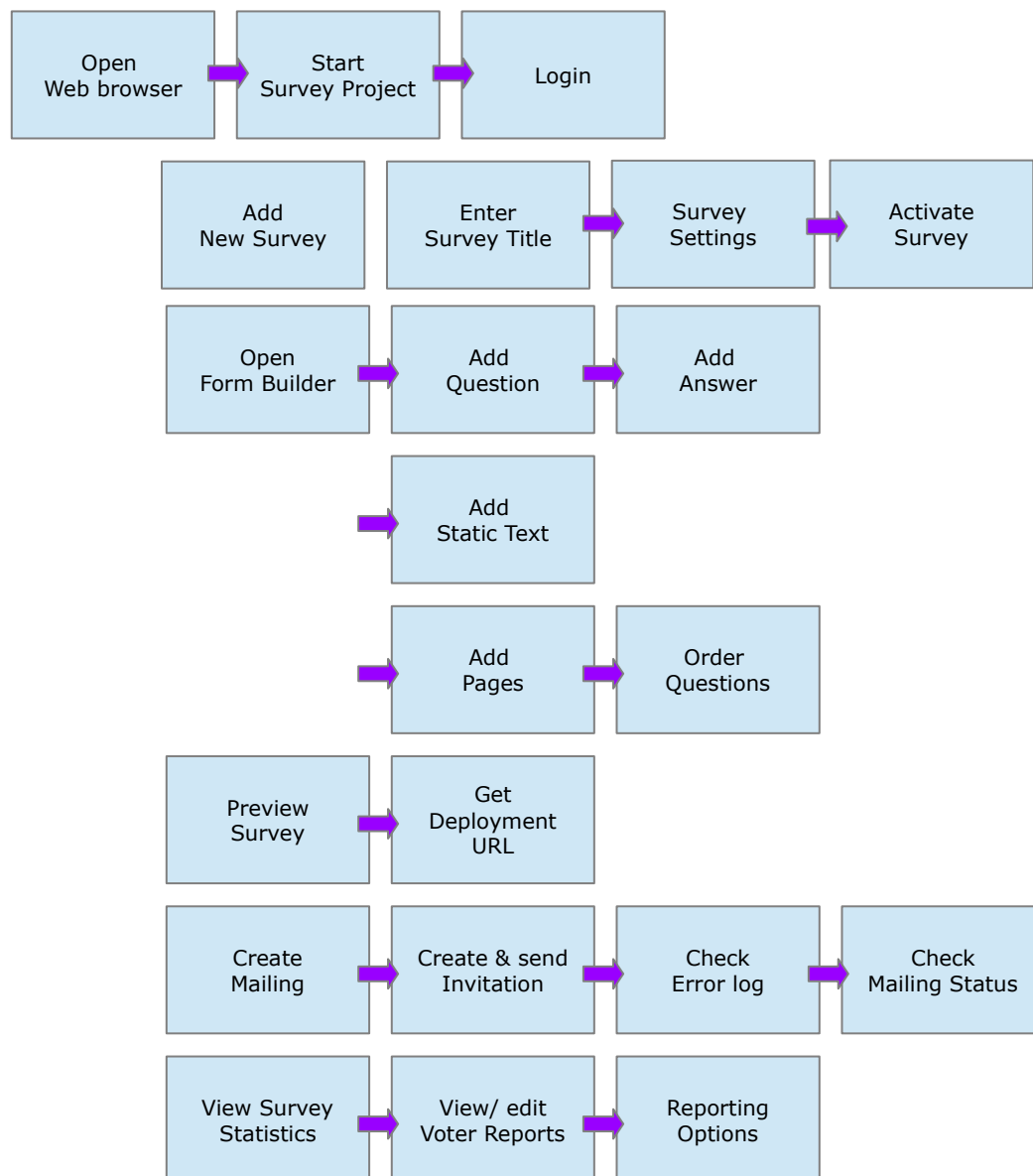
o **Notes** indicating additional advise or warnings are written in separate (pastel) textboxes

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

\*) 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. Settings & Activation
4. Add Questions
5. Add Answers
6. Add Static Text
7. Order Questions and add Pages
8. Preview and URL
9. Publication
10. Mailing
11. Statistics, Results and Reports

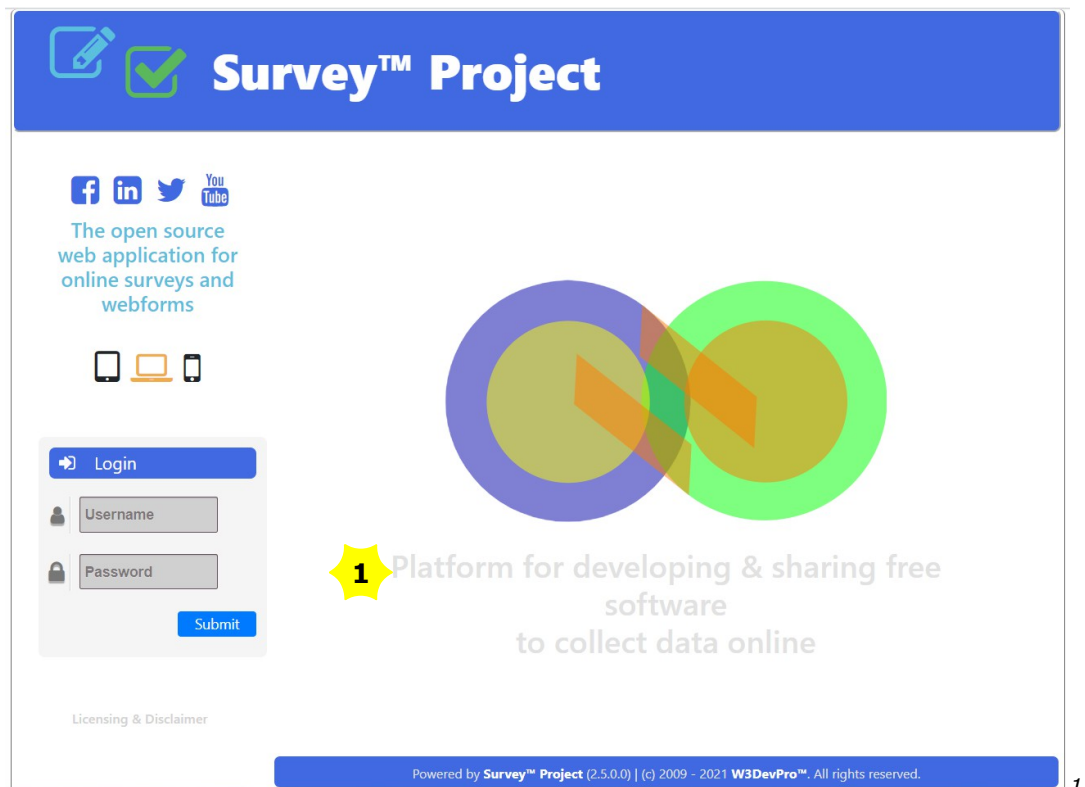


## 1. Accessing Survey Project

o An SP™ User account is needed to access 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 and click enter

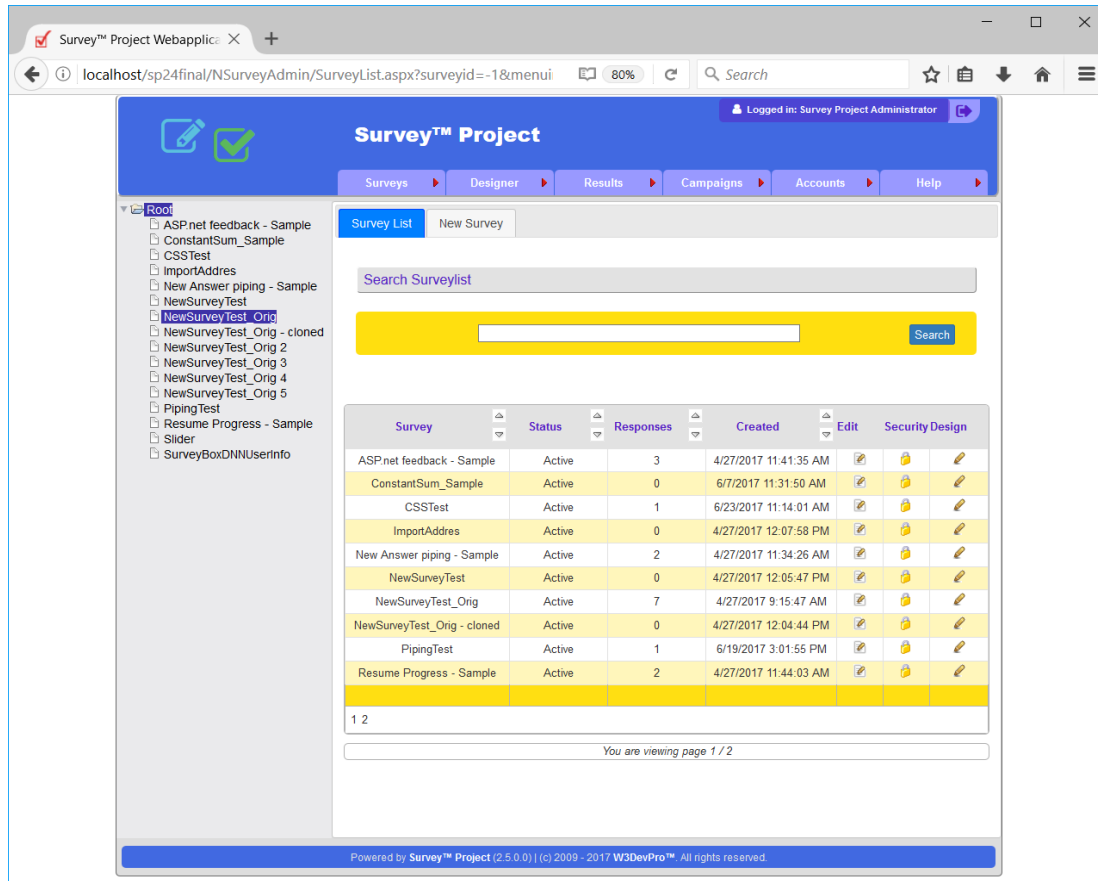


Starting page of the SP website to login

### Actions

3. Enter the **username** and **password** of the SP™ user account **[1]** and click the **Submit** button to log in

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.



The screenshot shows the Survey™ Project Webapplication interface. The browser address bar displays the URL: localhost/sp24final/NSurveyAdmin/SurveyList.aspx?surveyid=-1&menui. The page title is "Survey™ Project". The user is logged in as "Survey Project Administrator". The main navigation menu includes: Surveys, Designer, Results, Campaigns, Accounts, and Help. The left sidebar shows a tree view of the survey structure, with "NewSurveyTest\_Orig" selected. The main content area displays the "Survey List" page, which includes a search bar and a table of existing surveys.

| Survey                      | Status | Responses | Created               | Edit | Security Design |
|-----------------------------|--------|-----------|-----------------------|------|-----------------|
| ASP.net feedback - Sample   | Active | 3         | 4/27/2017 11:41:35 AM |      |                 |
| ConstantSum_Sample          | Active | 0         | 6/7/2017 11:31:50 AM  |      |                 |
| CSSTest                     | Active | 1         | 6/23/2017 11:14:01 AM |      |                 |
| ImportAddress               | Active | 0         | 4/27/2017 12:07:58 PM |      |                 |
| New Answer piping - Sample  | Active | 2         | 4/27/2017 11:34:26 AM |      |                 |
| NewSurveyTest               | Active | 0         | 4/27/2017 12:05:47 PM |      |                 |
| NewSurveyTest_Orig          | Active | 7         | 4/27/2017 9:15:47 AM  |      |                 |
| NewSurveyTest_Orig - cloned | Active | 0         | 4/27/2017 12:04:44 PM |      |                 |
| PipingTest                  | Active | 1         | 6/19/2017 3:01:55 PM  |      |                 |
| Resume Progress - Sample    | Active | 2         | 4/27/2017 11:44:03 AM |      |                 |

The page also shows a pagination bar indicating "You are viewing page 1 / 2".

2. Opening page after login showing full (admin) access including already existing surveys.

## 2. Creating New Surveys

### Actions

1. Go to menu **Surveys/ Survey New** or click the **New Survey** Tab [1]

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

2. Enter a **Survey Title** in the text box [2] and click the '**Create Survey**' button [3].

**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 [Root] directory on the left hand side of the page.

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.

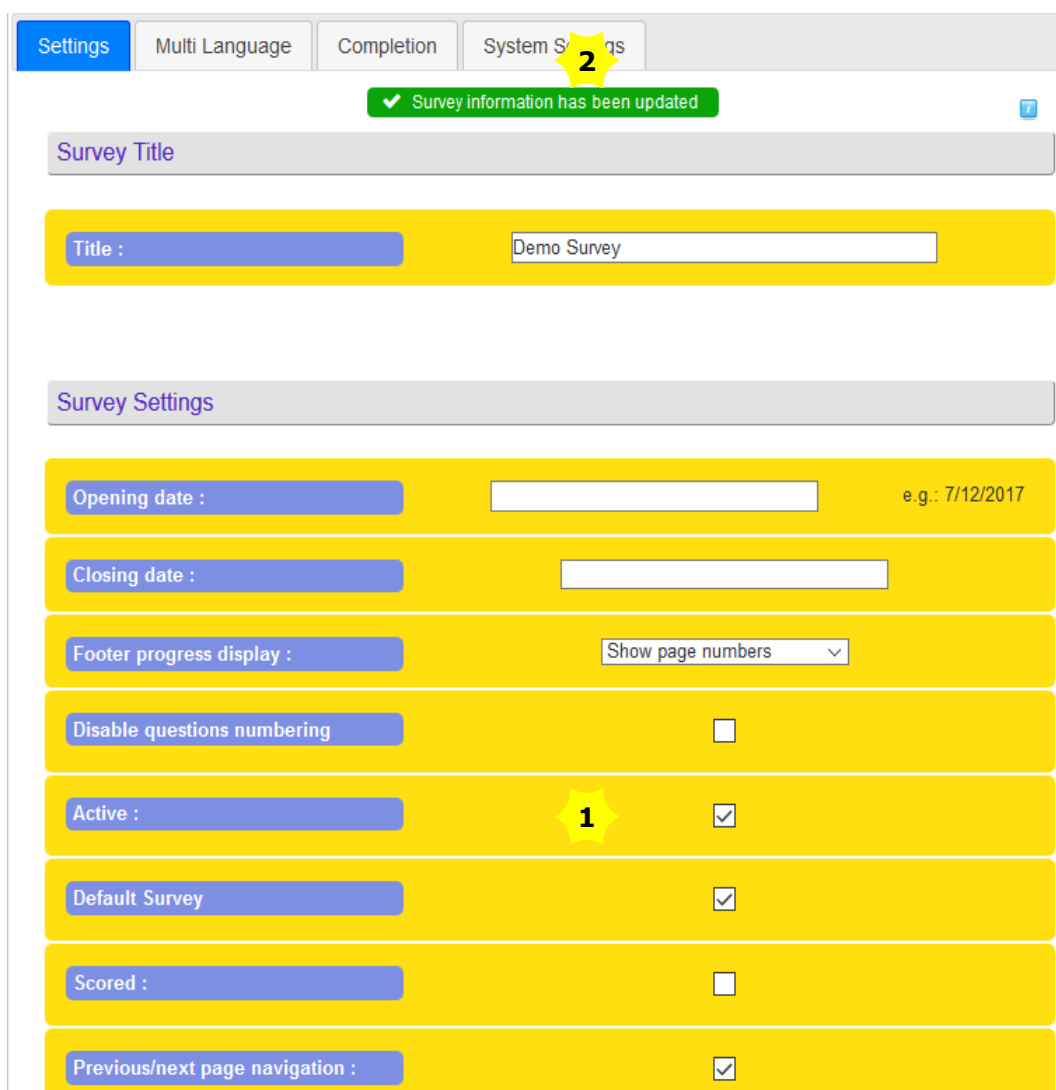
o After creating the new survey the Survey Settings page is shown.

### 3. Survey Settings & Activating

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

#### Actions

1. Go to menu **Survey/ Settings/ Survey Settings** to open the Settings page.
2. Click the '**Active**' checkbox [1] to activate the survey for publication.
3. Click the '**Previous/ Next page Navigation**' checkbox to allow paging back and forth.
4. Click the '**Apply Changes**' button at the bottom of the page to save the changes.
5. Check the (green) **confirmation message** [2] at the top of the page.



13. Survey Settings including confirmation message



**Note:** Any changes when applied will immediately become effective even if publication/ answering is going on. This also applies to the Survey content (Questions/ Answers) when changed.

The Survey Title can be changed at all times without any impact on the survey setup or content.

Check the SP Helpmenu for a complete overview and working of all options.

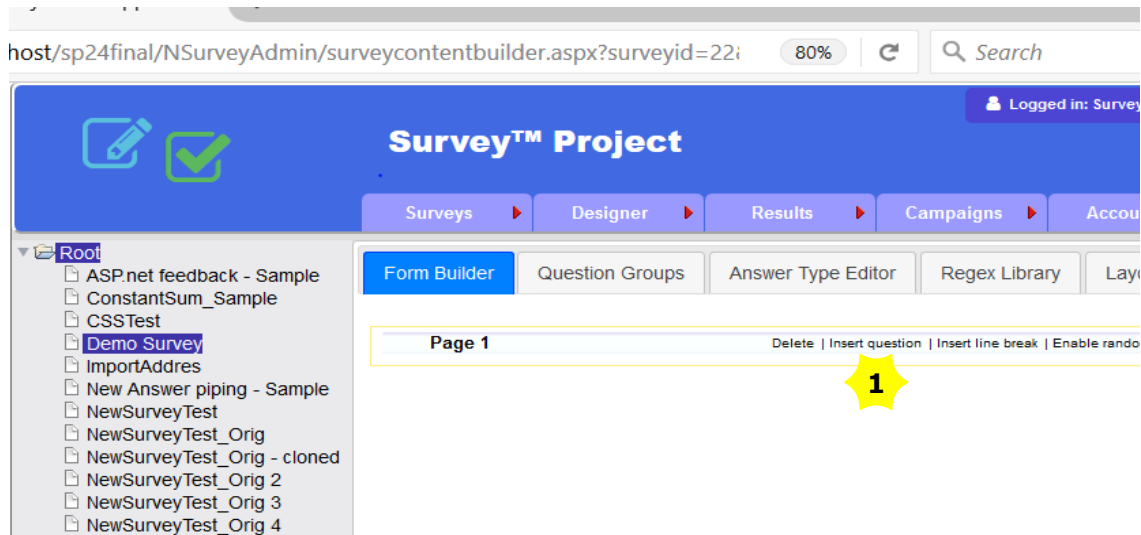
o The '*Default Survey*' checkbox is used to set one particular survey as 'selected by default':

- 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.

## 4. Adding Questions

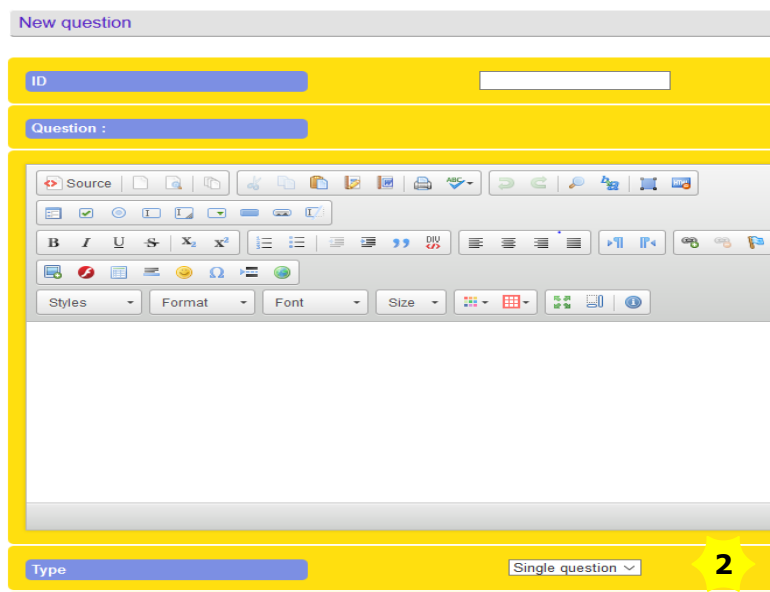
The **Formbuilder** is used to create the actual survey by adding questions, answers and pages.



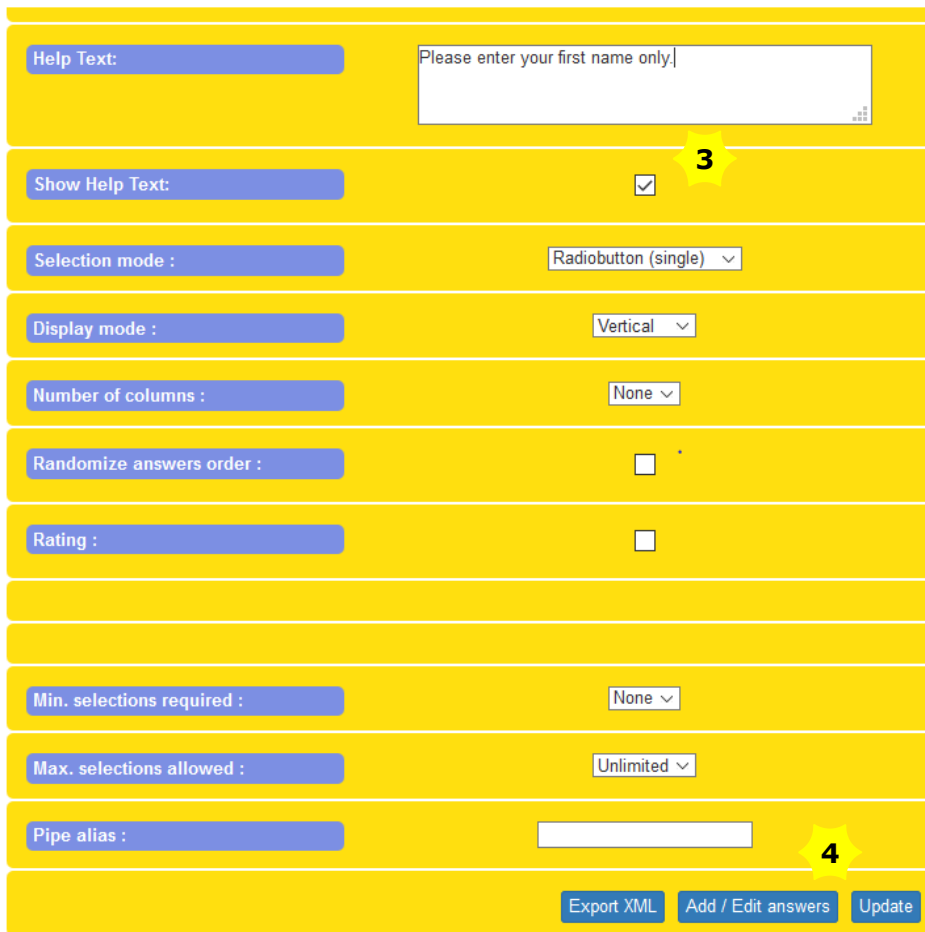
4. New survey automatically opened in Form Builder to start adding questions

### Actions

1. Click menu Designer/ Survey Formbuilder to open the formbuilder.
2. Click the **"Insert Question"** text link **[1]** in the **'Page 1'** menu bar to add a new question.



5. Question Editor on adding a new question



6. Question Editor settings and selection options

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

3. Select the "**Type**" – **Single Question**- from the Drop Down List (DDL) [2]
4. Enter a question text in the Html/Text **Editor**
5. 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.
- o Other options are used to determine layout or rating or mandatory answering etcetera.

#### Actions

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

## 5. Adding Answers

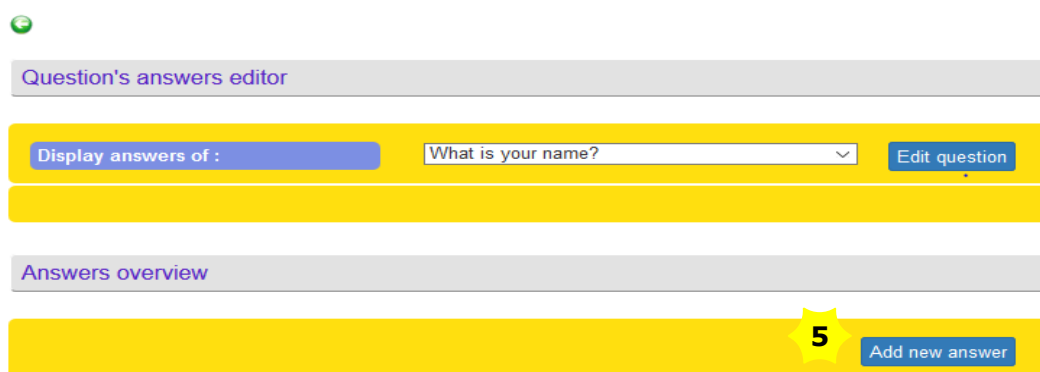
### Actions

1. 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

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



7. Answer Editor on adding first answer

### Actions

3. From the '**Type**' dropdownlist [6] select the **Field-Basic** option
4. Enter the **Answer Text** (e.g. 'My first name is')
5. Click the **Mandatory** checkbox to enforce entering an answer.
6. 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 length 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 :  | <b>6</b> | Field - Basic                       |
| ID :  |          |                                     |
| Alias :   |          |                                     |
| Answer text :   |          | My first name is:                   |
| Image URL :   |          |                                     |
| Default text value*   |          |                                     |
| Regex server side validation :  |          | No validation                       |
| Mandatory :   |          | <input checked="" type="checkbox"/> |
| Pipe alias  |          |                                     |
|   |          | <b>7</b>                            |
|   |          | Cancel Add                          |
| <p>*you can specify special values that will be replaced at runtime into the text value :<br/>##yourquerystringvariablename##</p> |          |                                     |

8. Answer settings on a Field-Basic answer type

## Actions

7. 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

## 6. 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 other question.
- o Both its content and layout can be created and edited with the Html/Text editor.

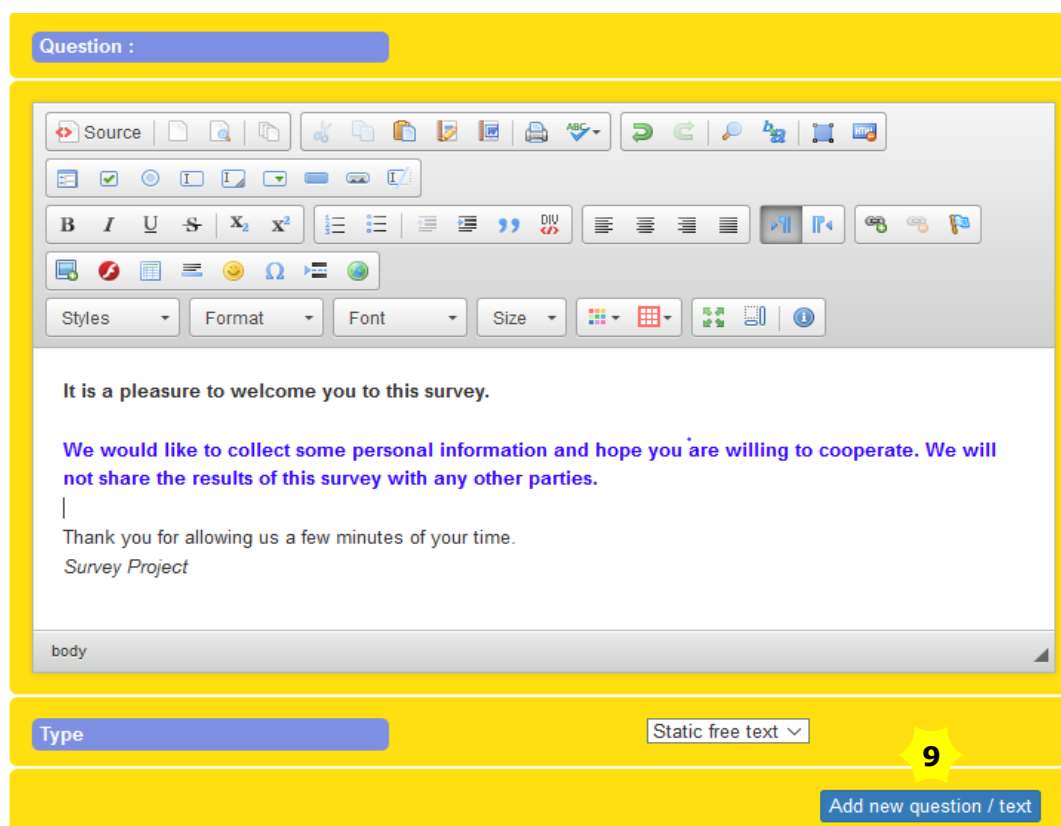
### Actions

1. Click the '**Insert Question**' text link in the blue Question menu bar to add a 'Static Text Question'
2. Select '**Type**' named **Static Free Text** from the dropdownlist
3. Enter text in the Html/Text **Editor** including layout (font, colors etc.)
4. 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



The screenshot shows the 'Question : ' menu bar at the top. Below it is a rich text editor with a toolbar containing various icons for text formatting (bold, italic, underline, strikethrough, text color, background color, font size, font family, bulleted list, numbered list, indent, outdent, link, unlink, image, video, audio, table, etc.). The editor area contains the following text:

It is a pleasure to welcome you to this survey.

We would like to collect some personal information and hope you are willing to cooperate. We will not share the results of this survey with any other parties.

|

Thank you for allowing us a few minutes of your time.

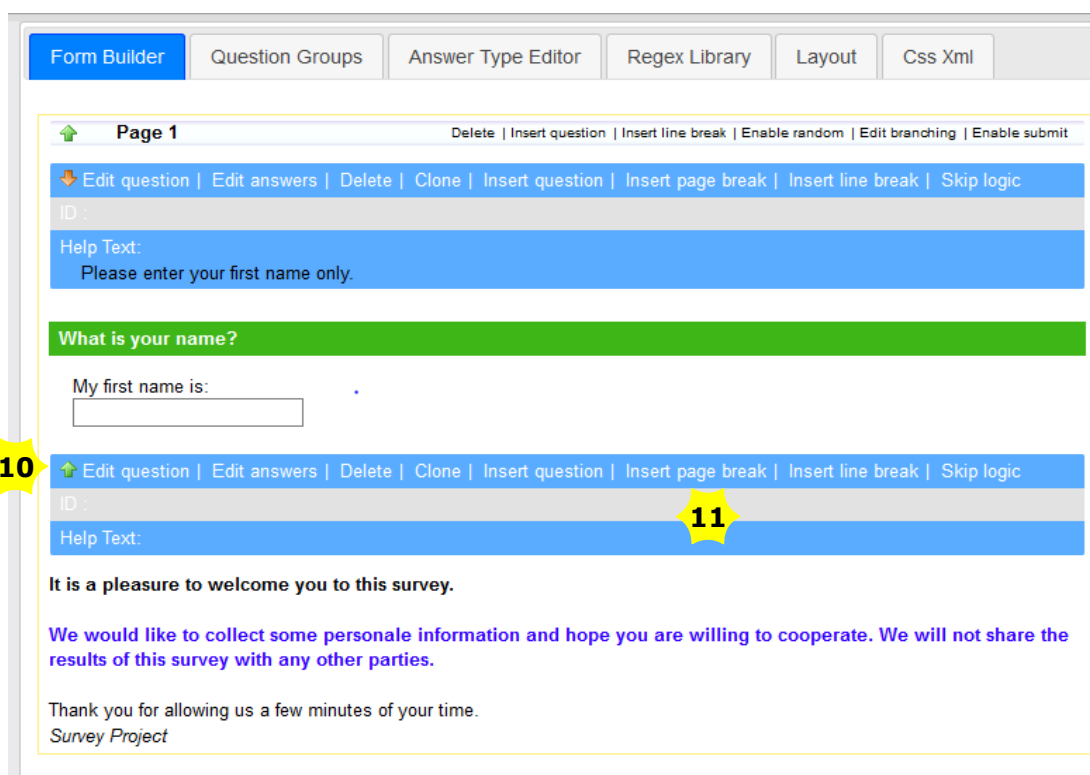
Survey Project

At the bottom, there is a 'Type' dropdown menu set to 'Static free text' and a yellow button labeled '9' with the text 'Add new question / text'.

10. Static Free Text "Question"

## 7. Paging and ordering Questions

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



The screenshot shows the Form Builder interface with two pages. Page 1 is titled 'Page 1' and contains a question 'What is your name?' with a text input field. Page 2 is titled 'Page 2' and contains a static text block. Callout 10 points to the 'Insert Page Break' button on the menu bar of Page 1. Callout 11 points to the 'Insert Page Break' button on the menu bar of Page 2.

11. FormBuilder Result after adding two Questions

### Actions

1. Click the **Green Up Arrow** [10] on the Static Text menu bar (blue) to move it to the top of the page.
2. 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) until 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 (ordering) actions on the Form Builder should look like:

Page 1
Delete | Insert question | Insert line break | Enable random | Edit branching | Enable submit

Edit question | Edit answers | Delete | Clone | Insert question | Insert page break | Insert line break | Skip logic

ID

Help Text:

It is a pleasure to welcome you to this survey.

We would like to collect some personale information and hope you are willing to cooperate. We will not share the results of this survey with any other parties.

Thank you for allowing us a few minutes of your time.

Survey Project

Page 2
Delete | Insert question | Insert line break | Enable random | Edit branching | Enable submit

Edit question | Edit answers | Delete | Clone | Insert question | Insert page break | Insert line break | Skip logic

ID

Help Text:

Please enter your first name only.

What is your name?

My first name is:

12. FormBuilder Result after switching order and adding page



## 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 menu options:

- Campaigns/ Preview
- Campaigns/Web/ - Deployment URL

### Preview Option

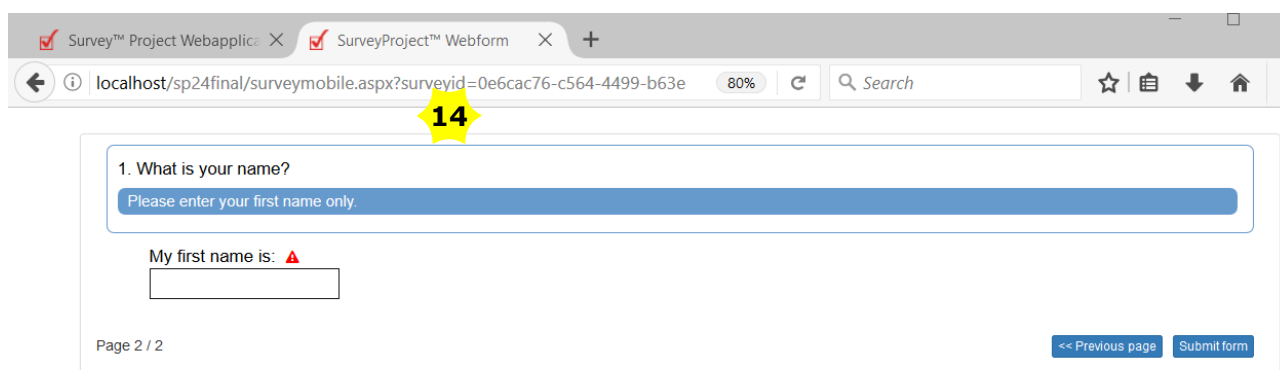
This will present the survey as shown to respondents when logged in to SP™ with a user account to 'take' the survey (menu Campaigns/ Take Survey).

### 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.

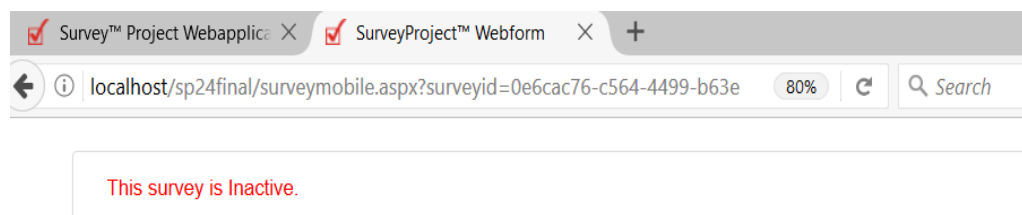
### Actions

- Go to menu **Campaigns/ Web** and click the **Deployment URL** to open in a new browser window **[14]**
- Check the **Survey** result and go back to the **Form Builder** to make an adjustment
- 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

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

Preview
Web
Mailing
Mailing Status
Mailing Errorlog

✓ Friendly name updated

Survey Hyperlinks

Deployment URL:
15
http://localhost/sp24final/surveymobile.aspx?surveyid=0e6cac76-c564-4499-b63e-23589383e546

Create Friendly Name Url :
demo
16
Save
Note: Friendly Url format = http:// [YourWebSiteUrl] / surveymobile.aspx / [YourFriendlyName]

Friendly URL:
17
http://localhost/sp24final/surveymobile.aspx/demo
Delete

### 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.

The Friendly Name must be unique. Duplicate names will be blocked (warning message).

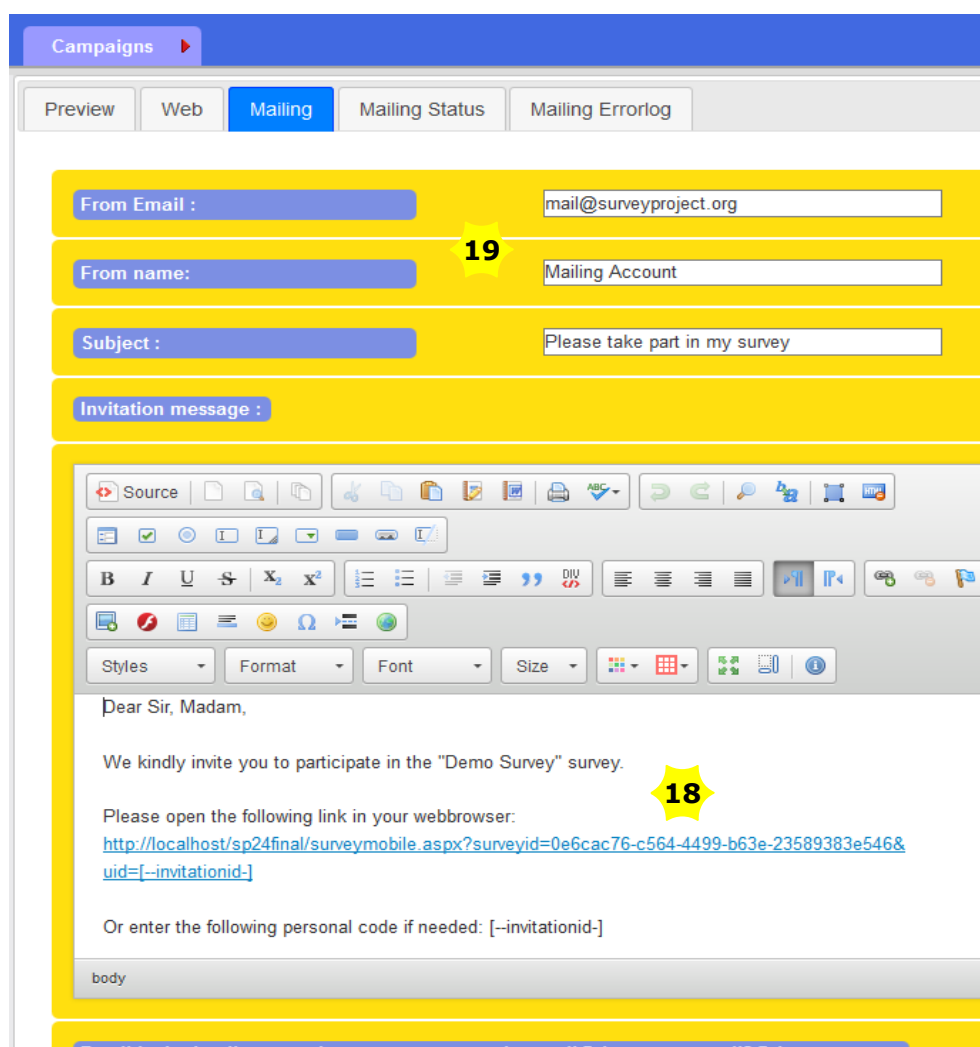
On the Surveylist the Friendly name is shown when hovering over the Survey *Title* in the list.

## 10. Mailing

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

### Actions

1. Go to menu **Campaigns/ Mailing** to send an invitation message including the survey URL **[18]**
2. Enter or edit the (pre filled) **From Email, From Name, Subject [19]** and **Message**
3. Add one or more (comma separated) **email addresses** to the Invitation list
4. 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™ Useraccount 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 address is set for the SP™ Useraccount the field is left blank 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 the Survey URL and Invitationcode are set on sending the invitation message. Any changes to them while editing the message could make them invalid.

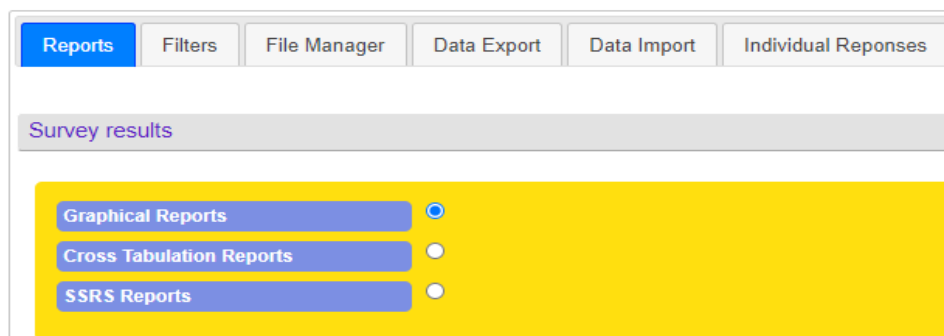
#### **Actions**

5. Wait for the **Confirmation** message to appear at the end of sending the Invitations
6. Go to menu **Campaigns/Mailing Errorlog** to check for (technical) mailing errors
7. 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.

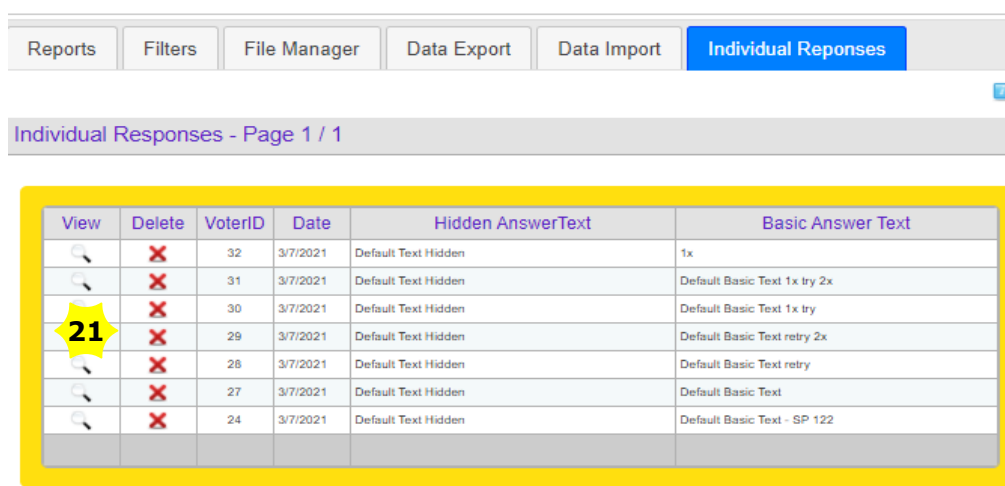


18. Results & Reporting options opening page

### Individual Reports

#### Actions

1. Go to menu **Results/ Individual Responses** to access the different individual Voter results
2. Click the **Details** icon [21] (looking glass) to open the '**Voter Report**' [22] of the individual respondent



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.

### Respondent Details

Database VoterID : 32  
 SP™ Username: Disabled  
 Email address : Anonymous  
 Response Language : Default language  
 IP address : ::1  
 Response recorded on : 3/7/2021 5:13:16 PM  
 Time to take the survey : 0 minutes, 18 secs.

22

[Switch to EDIT mode](#)

### Survey answers

Field Hidden Answer inserted

▣ Hidden AnswerText :  
 Default Text Hidden  
 ▣ Basic Answer Text :  
 1x

20. Voter Report including meta data and edit option

## Survey Statistics

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

### Actions

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

### 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<br>1 entries | 12  | 13  | 14  | 15  |     |

21. Statistics page including reset and delete options

**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.

## Graphical Reports

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.

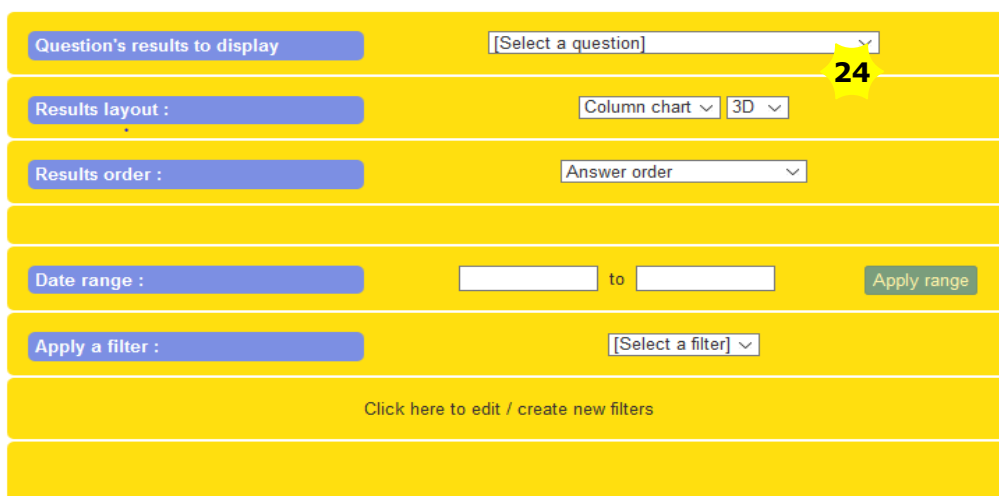
**Note:** To create a *non-textual* Answer open the FormBuilder, click the Edit Answers text link to open the Answer Editor. Add two other Answers of Answer Type: Selection Text. Answer Text: True, Not True.

See Chapter 4 Adding Answers

## Actions

49. Go to menu **Results/ Reports** to open the Graphical Reporting options page.

50. Select 'All Results' or one question [24] from the 'Question's Results to Display' – dropdownlist

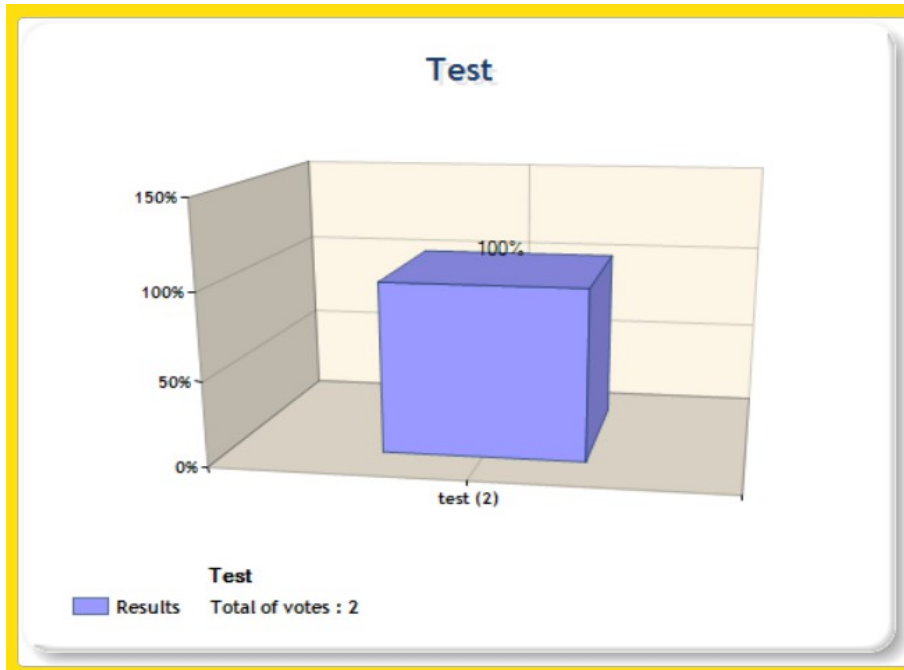


2. Graphical Reports selection and options screen

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 or after selecting a question to make changes to the type of report required. Both 2D and 3D versions are available.



23. 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.

## SSRS Reports

SQL Server Reporting Services are added to SP to develop custom reports. Two sample reports are available by default.

Reports

Filters

File Manager

Data Export

Data Import

Individual Responses

SQL Server Reporting Services - 1 / 1

| View | Description  | FileName             | Size  | Modified             |
|------|--|----------------------|-------|----------------------|
|      | Report to select any of the surveys through a DDL and print/ export all Q&As - voteranswers NOT included | SsrsPrintSurvey.aspx | 2,614 | 2/28/2021 3:19:07 PM |
|      | Basic SSRS report example as added to SP.  | SsrsReport.aspx      | 1,900 | 2/28/2021 3:18:17 PM |
|      |  |                      |       |                      |



**APPENDIX**

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

- Security Settings
- Multilanguage Options
- Layout & Design
- Import/ Export Options
- User Management
- Using Question Libraries
- Adding Answer Types
- Using Regular Expressions
- Completion message and Results Reports

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.
- Through the Support/ Helpfiles menu of the Survey™ Project Community site additional information and documentation can be found on Survey related themes

<http://www.surveyproject.org/Support/Helpfiles/>

- 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 also 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](mailto:mail@surveyproject.org)

### **Survey™ Project**

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

<http://www.surveyproject.biz> – SP™ Business Services redirect to SP.org

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

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

<https://surveyproject.github.io/spdocs> - Github SP™ Technical documentation

### **SurveyBox DNN® module**

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