



Lime Survey User Guide

Version 2.58

VIU version

Originally created by Okanagan College Kevin Trotzok, IR Analyst

Edited by Anastasia Chwist

January 2017

Table of Contents

Lime Administration Screen	2
Creating a New Survey.....	2
General Options	3
Presentation & Navigation tab.....	3
Publication & Access Control Tab.....	4
Notification & Data Management Tab	4
Tokens Tab	4
Survey Main Menu	5
Question Groups.....	5
Questions.....	6
Commonly Used Question Types	8
Special Question Types	10
Sub Questions and Answer Options.....	10
Conditional Logic.....	12
Activate a Survey	16
Participants and mailing lists	17
Mailing invitations (spam issue & solutions)	20
Email Templates	20
Sending Test Emails.....	21
Generating Tokens	22
Entering Paper Survey Responses	22
Responses	23
Displaying Responses.....	24
Get Statistics.....	24
General Filters	26
Response Filters	26
Closing/deactivating a Survey.....	27
Advanced user settings information.....	29
Template Editor	29
Copying a Template.....	29
Uploading a Template Logo	29
Changing a Template Logo	30
Sharing a Survey	30

Lime Administration Screen

After logging in to Lime, you will see a menu in the top left.




Configuration – This is where you will see information based on the user settings applied to your account. Most will only see Advanced “Manage Label Sets” – this is where you can edit or add new labels for questions.

Surveys (# of surveys) – This will bring you to the home page with a list of surveys- active, archived, or inactive. Note that you can only see the surveys you own or are permitted to see based on permissions.

Response balance – This shows the balance of tokens remaining for the VIU Surveys account. Every completed or partially completed survey costs one token. This bank is managed by OUPA.

[Your account name] – This will show you your account profile information and personal settings. This is where you can change your password if you wish.

 - This will show you any notifications that you may have.

On the **Survey list** page, you will see the following:

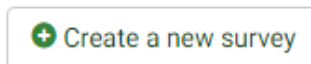
- **Survey ID** is an internal unique identifier for a survey.
- The **status** column shows what surveys are

 **Expired**  **Active**  **Inactive**

- **Title**, **Created** and **Owner** and **Anonymized Responses** are self-explanatory.
- **Partial** is the number of surveys that have been started and are either in progress or have been abandoned.
- **Full** is the number of surveys that have been completed.
- **Total** is the combination of both numbers.
- **Closed Group** defines whether a survey requires a token to access (**Closed**) or is an open survey that anyone with the link can fill out (**Open**).

Creating a New Survey

To start creating a survey, click the “Create a new survey” button on the upper right of the screen.




Alternatively, you can click the small arrow beside “Surveys” in the top right bar, and select “Create a new survey.” This is also where you can copy or import surveys.

On the next screen you can give your survey a title, enter a **survey description** (not displayed to respondents) as well as a **welcome message**, which the respondent will see when they open the survey and an **end message** at the end of the survey.

***IMPORTANT* PLEASE NOTE:** On the welcome page, it is require you ask for the respondents consent to participate in the survey. Consider the following example:

The purpose of this survey is to "PURPOSE". The survey will take approximately # minutes to complete. Responses to the survey will remain anonymous and will not be associated in anyway with your student file at VIU. Written comments will not be attributed to you, but will be edited or censored if you identify yourself in your comments. Survey responses will be "SURVEY DATA USE". By pressing 'next', you are consenting to participating in this survey under the terms outlined above.

Make sure you press **save** after entering the text. (Note that you can get back to this screen to edit the text by selecting the  button on the survey list page).

On the right hand side, there is a column with the following options:

General Options


The **End URL** is the link that appears at the end of your survey. This can be a link to your website, services that you mention, etc.

What you write in the **Administrator** text box will appear as the **name of the sender in the survey invitation**.

Format - This determines when **page breaks** will happen.

- **Question by question** will present the user with only one question at a time on the screen.
- **Group by Group** will show the user all questions within a group that the author made on one page. It is up to the survey author to decide if they want multiple question groups or not.
- **All in one** will show all of the questions across all groups in one long page.

The **Template** should be automatically set to "Default_VIU." This is the basic survey template with the VIU logo at the top.

When you click on the  button on the survey list page (this option does not display on the "create a survey" page), the General Options column will give you the option to **add additional languages** to a survey. Adding a new language requires you to write out the entire survey again in the other language. It does NOT auto translate for you.

Presentation & Navigation tab

Many of the options we leave as the default, so we will only outline the ones that should be changed.

Show group name and/or group description - This will display the name of your question group in a header bar. If you only use one group and don't want the name of it show on the survey (i.e., you named the group "Questions") then set this to **Hide Both**.

Show question number and/or code - If you want your questions to be numbered, then choose **show question number only**. If you want to show the codes you assign to your questions when you create them (in a later step) then choose **show question code only** (You would want to do this if the question code was relevant to the person filling out the survey or descriptive). This is set to **hide both** by default.

Show "No answer" - This will add an answer option, **that is selected by default**, to the end of every question that has selections (choose one, choose all, matrix, etc.). If you prefer to have no default response, or to have blanks come back in your data, then change this to off.

Publication & Access Control Tab

List survey publicly - Make sure this is set to off. If this is set to yes, it will appear to anyone. You would only want to use this if you have a survey that you want anyone who visits the website to answer. You can still create open surveys if this is set to off.

Start Date/time - This is the date and time the survey will be open to accept responses.

Expiry date/time - This is when the survey will stop accepting responses.

Set cookie to prevent repeated participation - The user will be told they already answered the survey. This option applies more to open surveys rather than closed surveys where people were invited to participate because the token would expire.

Notification & Data Management Tab

Here you can set whether certain information will be gathered from user responses.

Date Stamp – Set this to **yes**. Though as there are cases where we will have online and paper responses from people, and they may get doubled up, so being able to select the first one based on the date would require this setting.

Save IP Address – Set this to **yes**. For the same reason as above, this can help you to determine if multiple responses were submitted by the same person. This can happen accidentally especially with open surveys. You will see multiple surveys in the responses list with the same IP and similar date stamps.

Participant may save and resume later - This option is for survey persistence. This would be helpful for people completing really long surveys.

Tokens Tab

The first 3 options have tooltips explaining how they work.

Anonymized responses – This will anonymize the responses regardless of whether you use tokens or not. This will allow the respondents to respond without you being able to tie back their answers to their email.

Enable token-based response persistence – This setting allows a token-based survey participant to save his responses and resume to answer the survey at a later time.

Allow public registration - This will allow users outside of the token table to register and receive a token to participate in the survey. Leave this set to **off**.


Use HTML format for token emails - If set to yes, this allows you to format your email invitations and reminders, add pictures, etc.). If this is set to no, your emails will be sent in plain text.

Send confirmation emails – This setting will send an email confirmation to the participant once they have completed the survey.

Set token length - Leave this set to 15.

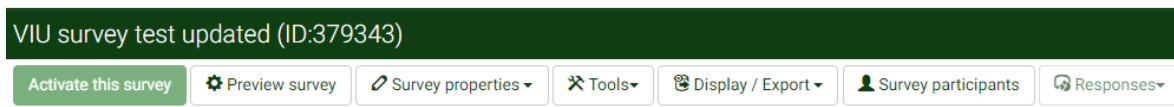
Press the “Save and close” button to open to the survey main menu.

If you need to change any of these settings later on, click on the **Survey properties** button and then click on **General settings & text** to change the survey description, opening and closing text.

To return to the survey administration page at any time, press the  **Surveys** button in the topmost menu.

Survey Main Menu

After creating a survey or selecting a survey from the survey list, you will see a new menu below the main menu:



Activate this survey - The first icon shows whether the survey is active or inactive.

Preview survey – This will run the survey for you, whether it is active or not, allowing you to either answer the survey (if it is active) or test it (if it is inactive). Note that if it is active, any responses will count against the response balance.

Survey Properties – This is where you can **edit text elements** of the survey (welcome message, completed message, etc.), the **general properties** of the survey (same as when you first set up the survey), the email templates (invitation, reminder, confirmation, etc. you can edit here), and various other options.

Tools – There are a few options in this menu including **Deleting the survey** or **re-setting conditions**.

Display / Export – Here you can export a **printable version** of your survey. You can also export the survey structure and other aspects of your survey.

Survey participants – Here is where you can create a **list of survey participants**, **create survey invitations** and **survey reminders**.

Responses – Here you can **view completed responses** and **generate statistics**. You can also **view partial (saved) responses** as well as perform **manual data entry** into the survey.

Organize question groups/questions – This will open up a window that lists all of the questions in the survey. The user can drag and drop the questions into a different order here.

For an empty survey, the main page will display options to change the selected **format**, **Add group**, **edit text elements and general settings**, and **select your template**. I recommend starting your survey by clicking **Add group**. You can also click on the “List question groups” on the left side column and select **Add new group**.

Question Groups

Give your question group a name. Note that this name will be visible if you set it to be in the general settings option **Show group name and/or group description**. Save and close the question group.

Now the questions menu will appear:

Group summary

Title:	Food (174)
Description:	This is an evaluation on how much you like certain foods.

Group quick actions

Add new question to group

+

Add new question to group

Some of the options are:

Preview question group/survey – This will preview all questions in the group or the entire survey if you have more than one question group.

Edit current question group – This will open the same window you saw when you first created the group.

Check survey logic for current question group – This will be used if you have conditional formatting on your questions.

Delete current question group – This will delete the current group, including all questions in it.

Export Survey Group – This will export the survey group and all questions within it so that it can be imported to another survey.


Questions


To create a new question, click the **Add new questions to the group** button to make a new question.

First, you must give your question a unique question **code**. Typically I use codes like Q1, Q2, Q3, etc. By default, this code is not shown to the respondent, but it can be.

In the **question** text box, enter your question text and format it using the menu options available.

There are some advanced editing features that you can use in the editor. Some of the important ones are:

 **Source** - Whatever you write in the question textbox is actually HTML formatted. To view and tweak this code, press the **source** button.

 - This button will let you add a **replacement field** to your question text. These can be token fields, additional attributes or answers to prior questions.


When you select a replacement field and press OK, you will see something like the highlighted text below:

Course: {INSERTANS:583372X19X529}

The code essentially is the **survey id** (583372), the **group id** (19) and the **question id** (529).



- This will let you add an image to your question. Note that the image must be located online as you must enter a URL. I usually add the image to the ACM as a digital asset and then refer to it that way.

In the **help** textbox, you can optionally enter some helpful text. If you do, an  icon will appear below your question with the text you entered.

In the right side column:

- Choose the **question type**. Note that if you hover the mouse cursor over the question type, a sample will appear to the left.
- Next, assign the question to a **question group**. It always defaults to the current group.
- Next, set whether the question is **mandatory** or not (the respondent cannot advance to the next question or group if they do not answer a mandatory question).

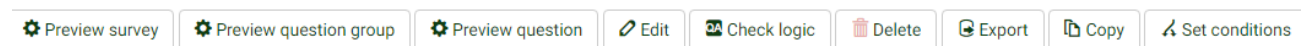
Depending on the type of question, you may also have the option to add an “other” option. This will automatically add an “**other**” **answer option** with a text box after it at the end of the answer options so there is no need to add **other** to your list of answer options.

- ☐ Self improvement/personal enjoyment
- ☐ Other:
- ☒ No answer

There are some **advanced options** available as well, like **always hide question** if we are disabling a question for a survey or **max number of responses** if we want to limit the number of responses to a multiple choice question.

Once you are done, click the **save and close** button.

Note that another menu bar will appear on the screen now, which is for the current question.



Preview question - This will show the question in its current state as if you were a respondent.

Edit - This will open the main editor for the question just like when you first made the question.

Check logic - Untested.

Delete - You will be shown a warning before you continue. Once deleted, you can't recover the question.

Export - You could use this to export a specific question and then subsequently import it to a different survey.

Copy - This will copy the current question and any sub questions or answer options you specified. You will have to enter a new question code and change the question text.

Set Conditions - This is where you assign conditional logic. This is covered later in this guide.

Edit Sub Questions - This is where you put the specific questions that make up an array type of question. This option only appears for specific questions and is covered later in the guide.

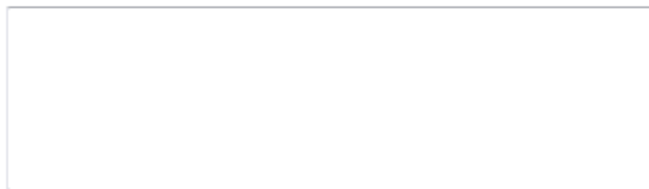
Edit Answer Options - This is where you assign answer choices like Strongly Agree, Agree, Neutral, etc. This option only appears for specific questions and is covered later in the guide.

Edit Default Answers – This lets you change the default answer that will be selected. This only appears for specific questions like List (radio).

Commonly Used Question Types

Long free text – Multi line text box for users to enter text based responses.

Long free text



Short free text – Single line text box.

Short free text



List (radio) – Choose ONE of the answer options. Allows you to customize the answer options. Always is shown vertical.

Choose one of the following answers

- ☐ Some example answer option
- ☐ New answer option
- ☐ Third answer option
- ☐ Last answer option
- ☒ No answer

Multiple choice – Choose all that apply from the answer options. **Note** – the words “check any that apply” is automatically added below the question text.

Check any that apply

- ☐ Some example subquestion
- ☐ New answer subquestion
- ☐ Third subquestion
- ☐ Last subquestion
- ☐ Other:

Array – Matrix type of grid with questions on the *left* and answers along the *top*. Choose ONE answer option per sub question.

	Some example answer option	New answer option	Third answer option
Some example subquestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New answer subquestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Third subquestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Array dual scale – Matrix grid with two answer scales (ie: use for agree and importance)

	Scale A				Scale B			
	Some example answer scale 1	New answer scale 1	Third answer scale 1	Last answer scale 1	Some example answer scale 2	New answer scale 2	Third answer scale 2	Last answer scale 2
Some example subquestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New answer subquestion	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Third	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Ranking – Lets the user reorder a list of answer options into a ranked list via drag and drop.

Click on an item in the list on the left, starting with your highest ranked item.

Your choices:

Some example subquestion

New answer subquestion

Third subquestion

Last subquestion

Your ranking:

1:

2:

3:

4:

Special Question Types

Sometimes there is a need for more specialized question types that are not a part of the main list of question types, but can be made using the advanced options.

Ranking via Sum of Multiple Numeric Inputs – the respondent must enter a number for each item in the list and the total for all numbers must equal 100.

The sum must equal 100.

Parking	<input type="text"/>
Wifi	<input type="text"/>
Food	<input type="text"/>
Work Environment	<input type="text"/>
Location	<input type="text"/>
Remaining:	100
Total:	0

For this question type, create a question of the type **multiple numerical input**.

Next, select **advanced settings** below.

Under the heading **Input**, enter the required total in the box labeled **equals sum value**.

Array of Checkboxes – If you ever need to have an array where a user can select multiple answers to a single sub question.

Select all modes of transportation that you use to get to each listed destination:					
	Personal Car	Bike	Bus	Carpool	Walk
Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To create this, first select the question type **Array (Numbers)**.

Next, select **advanced settings** below.

Under the heading **display**, set **checkbox layout** to **yes**.

Sub Questions and Answer Options

When using any question type that has multiple questions or answer choices (list, multiple choice, array, ranking, etc.), you have to specify the **sub questions** or **answer options**.

Click on the first button to add/edit **sub questions** or press the second button to add/edit **answer options**. Both of the following screens look the same.

You will open the edit sub question/answer option window. The example below is for an array type of question:

Position	Code	Subquestion	Relevance equation	Action
	SQ001	An apple	1	
	SQ002	A banana		
	SQ003	A cheeseburger		
	SQ004	A smoothie		
	SQ005	Some example subquestion		

The code shown is automatically added and does not need to be altered.

The **sub question** textbox is where you write the response choices.

To **add** another sub question, press the button at the end of the sub question.

To **remove** a sub question, press the button at the end of the sub question to delete.

To **reorder** the sub questions, click on the button at the left of the sub question you want to move. Click and drag the sub question to the position in the list where you want it to be.

Note: Make sure you do NOT have a blank sub question row at the bottom or it will show as a selectable option to the respondent.

When you are done, press the **save and close** button.

The **predefined label sets** button will give you a list of label sets that we have made in advance that you can use to quickly add sub question options to your question (i.e., 5 point agree scale).

Available label sets: ✕

CodeLabel
1 Strongly Agree
2 Somewhat Agree
3 Not Sure
4 Somewhat Disagree
5 Strongly Disagree

Make sure you press the **replace** button when using a predefined label set. If you press add, it will add the answers below the first blank response, making a blank sub questions appear to the respondent unless you delete it.

Quick add allows you to add all of your sub questions one row at a time in a textbox. This is ideal for pasting the results out of a word document. Press **replace** when you are done with the quick add window, or press **add** if you are appending more answer options to the list.

Enter your answers: ✕

Enter one answer per line. You can provide a code by separating code and answer text with a semicolon or tab. For multilingual surveys you add the translation(s) on the same line separated with a semicolon or tab.

Replace
Add
Cancel

Note that sometimes MS Word formats the text with **additional white space**. If this happens, paste your questions into notepad first, remove the white space and then copy and paste into the quick add window, or just make sure you remove the extra white space.

Save as label set will add the sub questions for the current question to the predefined label set library, which you can use on subsequent questions.

***Make sure you press **Replace** after adding all of your sub questions.

To **reorder the questions** in your survey, press the **Question organizer** button on the Survey menu bar.

✓ Save
✎ Save and close
Close

Survey < >

Questions and groups: ▾

Question explorer ▾

List question groups

List questions

Question organizer

Survey participants

Return to survey list

VIU survey test updated > Organize question groups/questions

Organize question groups/questions

📘 To reorder questions/questiongroups just drag the question/group with your mouse to the desired position. After you are done please click the 'Save' button to save your changes.

🔍 Collapse all
🔍 Expand all

📁 Food

Q1: [1] Rate your satisfaction level when you have the following

Q2: [1] What's your favorite food?

On the screen that opens, just **drag and drop** the questions into the order you would like them to appear and press **save and close**.

Once you are done adding and arranging questions in your survey, you can **preview** what the survey looks like by pressing the **Preview survey** button.

Conditional Logic

This feature in Lime works on a per question basis. Essentially, it answers the question of “**show the selected question if...**”

To add conditional logic to your survey, **select the question that will appear if a specific condition is satisfied** from the question dropdown list.

Next, press the 🔗 Set conditions button in the menu bar.

The logic for showing a question is built in a couple ways:

- 1) If you are showing a question based on **one or more** responses to a **single** question, then simply select the question of interest and one of the responses and **Add Condition**. Repeat this till all the responses you wish to have link to the conditioned question are added.

(ie: you want to show a question if the respondent answered Disagree **or** Strongly Disagree to the previous question)

One or more answers to the same question (OR Logic)

The screenshot shows the 'Conditions designer' interface for a survey question. At the top, there are tabs for 'Show conditions for this question', 'Add and edit conditions', and 'Copy conditions'. A 'Move to question' dropdown is set to 'Q3a: What is your favorite restaurant(s) in N...'. Below this, a message says 'Condition added.' The main section is titled 'Conditions designer' and contains the text: 'Only show question Q3a: What is your favorite restaurant(s) in Nanaimo that accommodate to your gluten and/or lactose allergy? if:'. Underneath, there is a 'Default scenario' section with two conditions: 'Q3: [Group of checkboxes] Do you have any of the following allergies?(qid2003) equals Gluten (SQ001)' and 'Q3: [Group of checkboxes] Do you have any of the following allergies?(qid2003) equals Lactose (SQ002)'. An 'or' button is circled in red between the two conditions, indicating the OR logic.

- 2) If you are showing a question based on responses to **multiple** questions, you want to use a **scenario** for each condition, or else Lime will use AND logic.

(i.e., You want to show a question if the respondent answered Strongly Disagree to **any question in an array**. You must use one scenario for each sub question (see below))

Multiple Scenarios (OR Logic)

After putting in 1 or more conditions for one question, change the scenario from **default (1)** to **2**. This will give you a second scenario.

The screenshot shows the 'Conditions designer' interface for a survey question. At the top, there are tabs for 'Show conditions for this question', 'Add and edit conditions', and 'Copy conditions'. A 'Move to question' dropdown is set to 'Q4: Whether you satisfied with cheeseburgers...'. Below this, a message says 'Condition added.' The main section is titled 'Conditions designer' and contains the text: 'Only show question Q4: Whether you satisfied with cheeseburgers OR if you are allergic to nuts, explain how you get your proper balance of fruit... if:'. Underneath, there are two scenarios. 'Scenario 1' contains two conditions: 'Q1:SQ003: [A cheeseburger] Rate your satisfaction level when you have the following(qid1996) equals Very satisfied (A5)' and 'Q1:SQ003: [A cheeseburger] Rate your satisfaction level when you have the following(qid1996) equals Quite satisfied (A4)'. An 'or' button is between the two conditions. 'OR Scenario 2' contains one condition: 'Q3:SQ001: [Gluten][Single checkbox] Do you have any of the following allergies?(qid2003) equals checked (Y)'. The 'or' button between the two scenarios indicates the OR logic.

One Scenario (AND Logic)

[Show conditions for this question](#)
[Add and edit conditions](#)
[Copy conditions](#)
 Move to question: Q3b:What is your favorite restaurant(s) in N... [Close](#)

VIU survey test updated > Food > Q3b > Conditions designer

Condition added.

Conditions designer [Quick-add conditions](#) [Delete all conditions](#)

Only show question **Q3b: What is your favorite restaurant(s) in Nanaimo that accommodate to your gluten AND lactose allergy?** if:

Default scenario			
Q3:SQ001: [Gluten][Single checkbox] Do you have any of the following allergies?(qid2003)	equals	checked (Y)	Delete Edit
and			
Q3:SQ002: [Lactose][Single checkbox] Do you have any of the following allergies?(qid2003)	equals	checked (Y)	Delete Edit

You can make a question visible based on either the answer(s) to a **previous question** or from a **token field** from the token table (a field from the mailing list).

If you choose previous question, select which question will affect the showing of the current question.

Next, select which answer will trigger the showing of the current question and press **add condition**.

Add condition

Scenario: Default scenario [Add scenario](#)

Question: Previous questions Survey participant attributes

Q1:SQ001: [An apple] Rate your satisfaction level when you have the f...
 Q1:SQ002: [A banana] Rate your satisfaction level when you have the f...
 Q1:SQ003: [A cheeseburger] Rate your satisfaction level when you have...
 Q1:SQ004: [A smoothie] Rate your satisfaction level when you have the...
 Q1:SQ005: [] Rate your satisfaction level when you have the following
 Q2: What's your favorite food?

Comparison operator: equals

Answer: Predefined Constant Questions Token fields

RegExp

A5 (Very satisfied)
 A4 (Quite satisfied)
 A3 (Neutral)
 A2 (Not really satisfied)
 A1 (Not at all satisfied)
 A6 (No answer)
 (No answer)



[Clear](#) [Add condition](#)

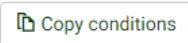
Press **Add condition** when you are done.

After adding a condition, it will be visible above the Add condition section of the page.

Only show question **Q3: Do you have any of the following allergies?** if:

Default scenario			
Q1:SQ005: [] Rate your satisfaction level when you have the following(qid1996)	equals	Very satisfied (A5)	Delete Edit

Note that if you press the garbage can in the top right, you can **delete all conditions** for this question. The  button will delete only the selected condition while the  button will let you edit the condition.

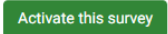
If you have multiple questions that have the same condition, you can **copy conditions** by pressing the  button.

Select the conditions you wish to copy from the selected question.

Next, select the question that you want to copy the conditions to and press **copy conditions**.

Activate a Survey

Once you have finished creating your survey you will need to activate it. You will also need to activate the survey if you need to send the link to someone else so that they can view it.

To activate a survey, press the  button on the left of the main survey administration page or from within the survey. The following window will appear showing you some options:

Warning: Please read this carefully before proceeding!

You should only activate a survey when you are absolutely certain that your survey setup is finished and will not need changing.

Once a survey is activated you can no longer:

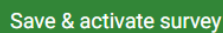
- Add or delete groups
- Add or delete questions
- Add or delete subquestions or change their codes

Additionally the following settings cannot be changed when the survey is active.

Please check these settings now:

Anonymized responses?	<input type="text" value="No"/>	Date stamp?	<input type="text" value="No"/>
Save IP address?	<input type="text" value="No"/>	Save referrer URL?	<input type="text" value="No"/>
Save timings?	<input type="text" value="No"/>		

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





Typically we don't need to record any information, but sometimes having the date stamp and IP address can be beneficial, especially when a survey is active where a token table is not used or a participant could fill out an online version and a paper copy where they write down their student ID.

After choosing the options you want, press the **save & activate survey** button.

Activate survey(379343)

Survey has been activated. Results table has been successfully created.

This survey is now active, and responses can be recorded.

Open-access mode: No invitation code is needed to complete the survey.

You can switch to the closed-access mode by initialising a token table with the button below.





You will then be asked if you want to **switch to closed-access mode**. This means using tokens and mailing lists.

To run the survey as an **open survey** that anyone answer if they have the survey link, press **No, thanks**.

If you want to use tokens (tokens allow you to track who responded what to the survey if the survey was not set as “anonymous”. If it was set to anonymous, you will not be able to see who said what, but it ensures one person cannot take the survey twice as each email will receive only one token), then select **Switch to closed-access mode**.

At this point, answering any question in the survey will be counted against the response balance.

If you have not already initialize the token management and select the **Switch to closed-access mode**, it will ask you to do so then. Select the **Initialize participant table**.

Participants and mailing lists

You can either manually add each participant by clicking **Create** and **Add participant**, or you can upload a file of participants using a .csv file.

Your .csv file must have at least the participants’ **first name (attribute must be labeled *firstname*), last name (*lastname*), and email (*email*)**. You can add additional information in columns beside these three mandatory ones (such as year of study, student category, gender, etc. all labeled ***attribute_1, attribute_2***, etc.).

Below is an example of a .csv file. The first line MUST contain the value names. You can add more attributes if you wish.

	A	B	C	D	E
1	firstname	lastname	email	attribute_1	
2	Anna	Wilson	email1@g	Female	
3	John	Smith	email2@g	Male	
4	Jane	Lynn	email3@g	Female	
5					

If you have added additional attributes on your .csv file, you must add the attribute to your participants table before you upload the file. Under the **Survey participants** page on the survey home screen, click **manage attributes**. You will want to add the number of attributes you have added to your .csv file. In my case, I only had one, so I put 1 and **added fields**. The following top part called **Manage attribute fields** will appear when you can name the attributes in the **Field description**.

Manage attribute fields

English(Base language)

Attribute field	Field description	Mandatory?	Show during registration?	Field caption	CPDB mapping	Example data
attribute_1	<input type="text" value="Gender"/>	<input type="checkbox"/> Off	<input type="checkbox"/> Off	<input type="text"/>	<input type="text" value="(none)"/>	

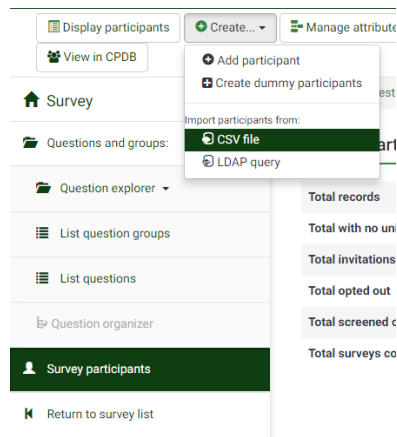
Add/delete survey participant attributes

There is 1 user attribute field in this survey participant table.

Number of attribute fields to add:

Delete this attribute:

After this is done (or if you do not have any more attributes), on the **Survey participants** page on the survey home screen, press the **Create** and import participants from a **CSV file** to start creating a token list to send out targeted survey invitations.



On the **Import survey participants from CSV file** page, leave all unchanged besides switching the **Separator used:** from **Automatic** to **Comma**. Otherwise, the upload will not capture all your data.

Import survey participants from CSV file

Choose the CSV file to upload: Lime_Update_Testing.csv

Character set of the file: (Automatic)

Separator used:

Filter blank email addresses: ☒ On ☐ Off

Allow invalid email addresses: ☐ On ☒ Off

Display attribute warnings: ☐ On ☒ Off

Filter duplicate records: ☒ On ☐ Off

Duplicates are determined by:

- First name - firstname
- Last name - lastname
- Email address - email
- Email status - emailstatus
- Token - token
- Language code - language

Once the upload is complete, you can view the participants. You can double-check that your attributes came through by pressing on the 'pencil' **edit** button beside one of the participants' name and look under the tab **Additional attributes**.

Edit survey participant

General **Additional attributes**

Gender:

Action	ID	First name	Last name	Email address	Email status	Token	Language	Invitation sent?	Reminder sent?	Ren...
<input type="checkbox"/>	1	Anna	Wilson	email1@gmail.com	OK		en	-	-	
<input type="checkbox"/>	2	John	Smith	email2@gmail.com	OK		en	-	-	
<input type="checkbox"/>	3	Jane	Lynn	email3@gmail.com	OK		en	-	-	

Selected participant(s):

Displaying 1-3 of 3 result(s) 10 rows

You will now see a new menu bar appear at the top of the screen.

This guide will cover some of the more commonly used menu items.

Display participants - Gives you an overview of the **survey participant information**.

Create -> Add participant - Allows you to **manually add a participant** to the token table. Typically we would never use this as we import a list of participants.

Create -> Create dummy participants - Used to create a number of tokens that can be used by anonymous users. Can also be used for entering paper responses to the survey.

Create -> CSV file - Used to **import a participant list**, in .csv format, into Lime.

Manage attributes - Allows you to **add attribute fields** to the token table. **You must add attributes to the token table BEFORE importing** your user list if you want to have any fields beyond first name, last name and email.

Invitations & Reminders - This is where you **edit the email templates** for your survey invitations and reminders.

Generate tokens - This button **generates tokens** for all participants in the survey. You must do this after importing a participant list.

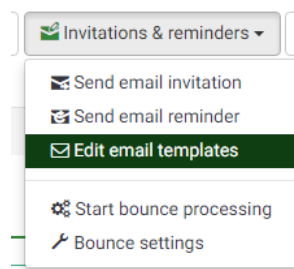
Delete participants table - Deletes the participants table for the current survey. Use this if you need to reimport the entire participant list.

Mailing invitations (spam issue & solutions)

PLEASE NOTE: There is an issue with some Lime Survey email invitation going straight to potential participants' junk mail. One suggestion we have is to send a warning email from an email address the participants may recognize letting them know they should be receiving an email from Lime Survey shortly and this invitation may be sent to their junk mail. This will advise them to check their junk mail and increase your response rate.

Other suggestions can be found in this forum: [How to prevent Lime survey email invitations or reminders being treated as spam.](#)

Email Templates




On the page that appears, there are several tabs with the following:


Invitation – This is the initial survey mail out to students. You can modify the subject of the message as well as the message body. You cannot customize who the email appears to come from or who replies should go.


Reminder – Works the same as an invitation, but is only sent to respondents who have not responded yet. Note that the reminder email needs to be sent manually and can't be scheduled.

IF YOUR SURVEY IS ANONYMOUS (not token based), reminder emails will be sent to all the emails provided. In your reminder email, we suggest writing the following in the first paragraph:

"This is a friendly reminder to participate in "SURVEY NAME". If you have already completed the survey, we thank you for your time and feedback."

If your token table that you created/imported contains additional **attribute fields** that you want to use in the email body, press the  button in the editor window. When you click on one of the token fields, it will add the name of the field to the email body and looks like "{FIELDNAME}"

If you want to really edit the look of the email with **HTML**, press the  **Source** button.

To add a **picture** to your email message, press the  button.

Confirmation – Sends the participant an email saying thanks for completing the survey. We haven't used these in the past.





Registration – These are used for a survey where users can register to participate, thus receiving a token, instead of being invited to participate. We have never used these types of surveys.



Basic admin notification – These inform the survey administrator by email that someone has completed the survey. For most of our surveys this would not be important so we have never used a feature like this.

Detailed admin notification – This is the same as the basic admin notification, but it also includes all of the answers the user submitted. Never used.

Sending Test Emails


NOTE: The **name of the sender** of the emails sent from Lime Survey to the participants is what is written in the **Administrator** textbox under the **Survey properties -> General settings & Texts** for the selected survey.

- 1) Add yourself and your email to the participants' list.
 - a. We ask that you send a test email to the OUPA Research Analyst at surveys@viu.ca so she may test and review your survey prior to the launch
- 2) Press the **Generate tokens** button to **give each of your participants (test and non-test) a token**. It will display a confirmation of how many tokens have been created.
- 3) Go back to the **Display participants** page to view your participants. Each will have a **Unique token number**.
- 4) Click on the small  **Send email invitation** button beside the participants you wish to send the test emails.
- 5) If your survey is not currently live, you will get a warning saying you won't be able to participate in the survey. This just means the link to the survey won't work yet.
- 6) Press the **Send invitations** button at the top of the screen. You should receive an email at the address you entered on the test user token shortly.
- 7) **To send a reminder email** you will have to repeat step 4 above. You will notice that the  button now looks like . This will NOT resend the invitation, but instead sends a reminder.
- 8) If you want to receive the official invitation when you launch your survey, click on the  button beside the test participants' name, and change the **Invitation sent?** to **No**.

- 9) The  button will change back to  letting you resend the invitation again (steps 4 to 6 above).

Generating Tokens

If you have not generated Tokens from testing your invitation, this is how you do it. Now that you have your mailing list and your email templates set up, you need to create **tokens** for the respondents.

Click the  **Generate tokens** button to assign a token to all of the records in the table. You will receive a message that you will generate tokens for all records in the token table that don't have one yet. Press **Yes** to continue. You will receive a message that the tokens were generated.

Note that the tokens will be made with random characters in the length specified in the **Tokens tab** under the **General Settings** menu. The default is 15 characters.

Entering Paper Survey Responses

If you have tokens enabled and you click on the survey link, you will be prompted with a textbox asking you to enter a token.

In order to allow for both methods of filling out the survey, use the following steps:

- 1) In the **Survey participants** window, click on the **Create -> Create dummy participants** button to create a **dummy token**.

Create dummy participants

ID: Auto

Number of participants:

Token length:


First name:


Last name:

Email address:



Language:


Uses left:

Valid from: 
Format: DD.MM.YYYY hh:mm


Until: 
Format: DD.MM.YYYY hh:mm

Gender:

- 2) You have two options on how you can fill out the surveys manually:
 - I. If you know something about each of the paper participants (their first name, last, name, etc.) follow this method. Have the **Number of participants** equal the number of paper entries you have, and **Uses left** remains at 1. This will generate 100 new participants. You can click on the  button beside the new participants' line and add in their names or attributes you know of. Then, you can click on the  **Execute** button beside each participant. This will open up the survey using that paper participants' token, and you can manually answer the survey with their answers.

- II. The other option is to have **Number of participants** equal to 1, and the **Uses left** equal to however many entries you have (or higher). Put in your email (or the email of the person inputting the paper data) in the **Create dummy participant** page. This method is useful for anonymous surveys. Find the dummy entry on your participants list and send an invitation by pressing . This will send an invitation to the email provided. Whoever gets that invitation now has a link to the survey.
- Click** on the survey link to access the survey.
 - Fill out** the answers online as they are in the paper copy of your survey.
 - Submit** the survey when done.
 - Click on the link again and repeat the last three steps until you have entered all of your paper copies.

Responses


To view the responses you have received for your survey, click on the  button and **Responses & statistics**. You can only access this section of Lime in an **active** or **expired** survey.



You will see a new menu bar at the top of the screen:



Here are the actions of some of the buttons we would use:

Summary - Displays the response summary to the survey. This is where you can see the number of full and incomplete surveys, number of invitations sent, etc.

Display responses – This is where you can view the responses. If it is token based and not anonymous, you can see who answered what. For each record, you can view the responses by click this  button.

If you press the  button, you can **edit** any part of the response while pressing the  button will **delete** the response.

Data Entry - Allows you to manually create a new record. If you are using a token controlled survey, you will still have to enter a token, or make one up. I have only used this for short surveys.

Statistics - Get statistics for responses. You can select which responses to include, whether to display graphs as well as output type (HTML, PDF or Excel). **NOTE:** If you output to **HTML** or **PDF**, you will be able to view the graphs. If you export to **Excel**, you will only get the data in tables. More on this below.

Export -> Export results to application - This is where you go to export the raw data from Lime. You can export to Excel, CSV, PDF, HTML or Word. You can choose which questions to include in the export as well as any token or attribute fields you want to

Export -> Export results to SPSS. This is self-explanatory, but we don't often do analysis on survey results in SPSS, so use this if you need to.

Import -> Import responses from a deactivated survey table. This button is important if you ever **deactivate** a survey to make changes. When you deactivate a survey, the responses are stored in a separate file. This allows you to merge any responses you received prior to the deactivation into the current survey.













View saved not submitted responses - Requires response persistence to be turned on for the survey. Allows you to view any partial responses that have been saved by a respondent.

NOTE: Partial Responses are surveys that the respondent never clicked the submit button. Usually these are surveys that truly are incomplete or were opened and then closed, but sometimes the respondent answers all the questions and never presses the submit button. You should review the partial responses to see if they are in fact the latter.

Displaying Responses


After clicking the **Display responses** button, you will be taken to a page that looks like this:


Survey responses Display mode: Extended Compact


<input type="checkbox"/>		id	lastpage	completed	token	First name	Last name	Email	startle
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	All <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	  	1	1	✓	ERWmBslk2zdohZM 			anastasia.chwist@viu.ca	
<input type="checkbox"/>	  	2	1	✓	ERWmBslk2zdohZM 			anastasia.chwist@viu.ca	
<input type="checkbox"/>	  	3	1	✓	YE7IF9amiuMqku8 				

Displaying 1-3 of 3 result(s). rows per page


You can also view more/less results at a time by changing the value in the **rows per page** dropdown.

If you press the  button, you will be taken to a screen that shows all of the responses for that individual vertically instead of horizontal.

Pressing the  button will allow you to edit the response. **NOTE:** you can edit everything about the response including answers, the token string, date submitted or if the survey is actually complete. Use with discretion.

Pressing the  button will ask if you want to **delete** the selected result. We usually use this if a response is clearly a duplicate or entirely blank.

Get Statistics

Clicking the  button will open up the form that allows you to generate some pre-formatted reports. There are two sections to the report generation form: **general filters** and **response filters**.

General Filters

General filters

Data selection

Include:

All responses

Complete only

Incomplete only

View summary of all available fields:

Off

Subtotals based on displayed questions:

Off

Statistics report language:

English

Response ID

Greater than:

Less than:

Output format

HTML

PDF

Excel

Output options

Show text responses inline:

Off

Show graphs:

Off

Number of columns:

One

Two

Three

Graph labels:

Question code

Question text

Both

Each question has its own graph type defined in its advanced settings. Using the chart type selector you can force the graph type for all selected questions.

Chart type:

As defined in questi

Here you can select what responses you want to include in your statistics as well as what responses to include based on ID or submission date.

The **Output options** allow you to include text responses to questions as well as the inclusion of graphs. The **Output format** Graphs will only be visible if you select **HTML** or **PDF** as the output format. If you select HTML, you will see bar charts that you can switch to a pie chart. PDF will only display bar charts.

Response Filters

Response filters

☐ Food (Question group174)

"Rate your satisfaction level when you have the following"

☐ Rate your satisfaction level when you have the following An apple - # ...

(A5) Very satisfied

(A4) Quite satisfied

(A3) Neutral

(A2) Not really satisfied

☐ Rate your satisfaction level when you have the following A banana - # ...

(A5) Very satisfied

(A4) Quite satisfied

(A3) Neutral

(A2) Not really satisfied

☐ Rate your satisfaction level when you have the following A cheeseburger...

(A5) Very satisfied

(A4) Quite satisfied

(A3) Neutral

(A2) Not really satisfied

☐ Rate your satisfaction level when you have the following A smoothie - # ...

(A5) Very satisfied

(A4) Quite satisfied

(A3) Neutral

(A2) Not really satisfied

☐ Rate your satisfaction level when you have the following - # Q1"

☐ "What's your favorite food?"

Responses containing:

☐ Q3 - "Do you have any of the following allergies?"

Gluten

Lactose

Peanut/nuts

Some fruits

Here you can select which questions you want to include in your report. Selecting the checkbox beside the question group name ("Food" in the above example) will select all of the questions in the group for the report.

After you have made your selections, press the **view statistics** button at the top of the page.

If you choose HTML, you will be taken to a website showing the report. If you choose PDF or Excel you will be prompted to save the report file.

NOTE: You may see the following in your dataset. Each affects the results Lime produces differently. *Lime includes "no answer" and "not completed/not displayed" counts in their percentages.*

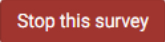
"Incomplete responses" counts: all responses that started, but weren't completed. A response started when the participant clicked "next" button in the survey, but did not click the "Submit" button in the end. Technically speaking, this is when there is no SubmitDate in the response table for this entry, but new data set was created already.

"No answer" in a question: when the question was displayed, but the participant hasn't given an answer. Technically speaking, this is when the question is not mandatory, was displayed, received no answer and the user clicked Next or Submit: the consequence is that the database field for this answer is set to "" (empty string). This "no answer" status cannot be really computed for Date or pure Numerical questions where the database field cannot record a string.

"Not completed/not displayed" in a question: when the page containing the question was not displayed. This can be because of conditions, or just because the participant left the survey before this page was displayed (or just while this page is displayed, but without clicking the Next button). Technically speaking, the database field for this question is filled with a NULL value.

Closing/deactivating a Survey

When your survey is complete or if you need to take the survey down to make changes, you will have to deactivate or expire a survey.

To close a survey, press the  button on the survey's main page.

There are some major differences between expiring and deactivating a survey:

Expiration	Deactivation
<ul style="list-style-type: none">– No responses lost– No participation information lost– Editing the survey is limited– Participants cannot access the survey anymore– It is possible to perform statistics on responses in Lime	<ul style="list-style-type: none">– All responses are not accessible anymore on Lime. Responses are moved to a backup table (how to restore data from a deactivated Lime survey)– All participant information is lost– Full editing of the survey available– Participants cannot access the survey anymore– You should export the responses before deactivating

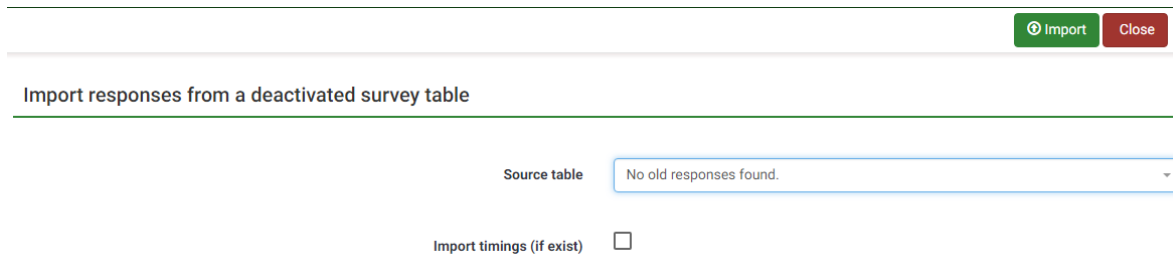
You want to **expire a survey** after it is complete so that the token table and responses all stay together.

You want to **deactivate the survey** BEFORE launching your survey so that none of the test data is kept in the results before making the survey live to respondents. Also, if you have to make changes to the survey, you can deactivate it and then reactivate it but any data collected before you deactivated it will be “lost” (sent to a backup table). You will also lose your participant information and will need to re-upload your participant group.

If you deactivate a survey that already has responses, the responses will be **exported to a backup table**.

In most cases, you can import the prior results back into the survey. To do this, go to the **responses** menu, then select the **responses & statistics** option.

On the menu bar, press the **Import** button to **import responses from a deactivated survey table**.



The screenshot shows a dialog box titled "Import responses from a deactivated survey table". At the top right, there are two buttons: "Import" (green) and "Close" (red). Below the title bar, there is a section labeled "Source table" with a dropdown menu that currently displays "No old responses found." Below this, there is a checkbox labeled "Import timings (if exist)" which is currently unchecked.

Note the warnings in the previous picture about how data is compared for compatibility.

The **source table** will contain all of the backup response tables (mine says **No old responses found** because I have did not deactivate my survey, but if I had this would display my backup tables). One is created every time you deactivate a survey, if there have been any responses.

Import timings will import the **date stamp** values, if you selected to record date stamps.

Once you have selected the specific response backup table to import, press the **import** button.

You will receive a message indicating that the responses were imported and the number that were imported.

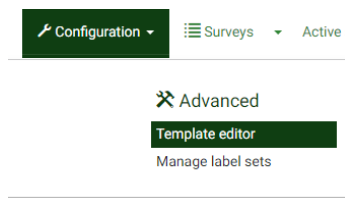
Advanced user settings information

The following information is only for users that have permission to add/edit Templates and/or the ability to add/edit users and user groups.

Template Editor

Please use the “Default_VIU” template for your survey.

To edit a template for your survey, click on the **Configuration** button and then click the **Template editor** button.




This is where you choose the template you want to customize for your survey. Note that if you need to customize any part of the survey, even a logo, you will have to go into the template editor and make a new copy of the survey.

Copying a Template

On the **Template editor** page, in the top of the screen are two dropdown boxes. The **Template** dropdown box will select a template while the **Screen** dropdown box will show one of the specific page types that makes up the template.

NOTE: I highly suggest copying a survey instead of creating a new survey from scratch as the default starting point for a new survey is very basic and the creation process very difficult.

To **copy a template**, use the template dropdown box to find a template you want to modify. Select the template from the dropdown box.

Once you select the survey to copy, press the  **Copy** button in the upper left menu.

Give your template a name. **Note** that any spaces you use in the name will be replaced with hyphens.

In the template editor window there are a number of list boxes including **Standard files**, **CSS & Javascript files** and **Other files**.

The **Screen** dropdown box in the upper right corresponds to each possible screen the user could see when doing a survey including the main three: **welcome page**, the **question page** and **completed page**.

Each of these pages has its own set of **Standard files**, so if you want to change the logo on each of these pages, you have to change it in three places.

Uploading a Template Logo

First, you need to **upload your logo** to the lime server. On the right side of the screen is a list box named **other files**. This is a list of images available to use.

To add a new logo to the template, click the **Choose file** button below the list box.

Navigate to where your logo is and click **Open**. Next, press the **Upload** button to add the logo to the available images.

Your logo file will now appear in the listbox above.

Changing a Template Logo

For this example, let's call the logo file **NewLogo.jpg**.

- 1) If your survey will have a welcome screen, start by selecting the **Welcome page** from the **Screen** dropdown box in the top right.

- 2) Next, under the **Standard** files list box, click on **startpage.pstpl**.

- 3) On **line 29** in the code window, you should see the following line of code:

```

```

- 4) You want to change the part that says **logo_VIU.jpg** to the name of your new logo, **NewLogo.jpg**.

```

```

- 5) Click **Save Changes** at the bottom of the code window when you are done with the modifications to the each current page. Repeat step 3 – 5 for the **Question page** and the **Completed page**.

*There is one additional place to replace the logo, but I haven't determined what the change does to the template.

- 6) In the **CSS & Javascript files** list box, click on **template.css**.

- 7) Around **line 194** of the code window you should see:

```
background-image: url(logo_VIU.jpg);
```

- 8) Change **logo_VIU.jpg** to the name of your logo file.

```
background-image: url(NewLogo.jpg);
```

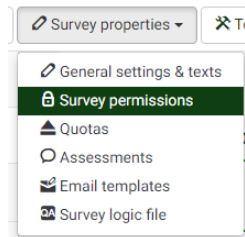
- 9) Click **Save Changes** once more and you are done.

Sharing a Survey

In some cases, you may want to share a survey with someone else. For example, student services has 5 surveys that we run for them but they deal with the responses and report generation.

To do this you first need to be able to **create a user** (under **Configuration**, you will see the section titled **Users** with options like **Manage survey administrators** if you have this permission).


Open the survey you want to share and under the **Survey properties** dropdown, select **Survey Permissions**.



On this page, you will see who has permissions to view the survey (you will most likely only see your user name here) and a dropdown list besides **User:** with an **Add user** button.

Click on the drop down box and select the user you wish to share the survey with. If you have created a group of users to share the survey with, you can select that group from the user group list. Press **add user** when you are done.

Survey permissions

Action	Username	User group	Full name	Assessments	Quick translation	Quotas	Responses	Statistics	Survey activation	Survey content	Survey deletion	Survey security	Survey settings	Survey text elements	Tokens
	achwist	–	Anastasia Chwist	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

User:

Please choose...

Please choose...

ainglis Amanda Inglis

bmetcalf Barbara Metcalf

BSW Social Work Department

chaseale Carie Chaseale














Add user

User group:


Please choose...

Add user group

You will see a list of **survey level permissions** that you can set for the user/group.

Edit survey permissions for user <i>chomson</i>		
	Permission	
Permission to create/view/update/delete assessments rules for a survey	Assessments	
Permission to view & update the translations using the quick-translation feature	Quick translation	
Permission to create/view/update/delete quota rules for a survey	Quotas	
Permission to create(data entry)/view/update/delete/import/export responses	Responses	
Permission to view statistics	Statistics	
Permission to activate/deactivate a survey	Survey activation	
Permission to create/view/update/delete/import/export the questions, groups, answers & conditions of a survey	Survey content	
Permission to delete a survey	Survey deletion	
Permission to modify survey security settings	Survey security	
Permission to view/update the survey settings including token table creation	Survey settings	
Permission to view/update the survey text elements - survey title, survey description, welcome and end message ...	Survey text elements	
Permission to create/update/delete/import/export token entries	Tokens	

Hover the mouse over each icon to see what the permission includes.

To share a survey with a user in which you only want them to be able to view the responses and report on them, select the only the **responses** and **statistics** options. Press **save and close** when you are done. This will bring you back to the **Survey permissions** page where you should be able to see your newly added users. They can now access the survey from their own account. You can also change their access to the survey at a later time by returning to this page and clicking the  button to **edit permissions**.