

University of Guelph

How to configure your survey's metadata

LimeSurvey Drill Down Data

Note: The author of this guide is the University of Guelph's Computing and Communication Services and was downloaded from this website: <https://www.uoguelph.ca/ccs/software/supported-products/limesurvey>

Although this is an annotated version created to be compatible with our LimeSurvey Website, the authorship and credit for this entire document is to be considered unchanged.

Identifying annotations: 1) insertions are in red font, 2) deletions are marked ~~like this~~, and other comments are in red-framed text boxes.

Travis Seymour, April 2013

INTRODUCTION

Surveys in the LimeSurvey system have five broad elements:

1. **Questions.**
2. **Answer options** for those questions where the respondent makes a selection from a list.
3. **Token table** - for surveys that are configured as “closed access” only people who have an entry in the token table can take the survey.
4. **Metadata** - configuration options for your survey such as whether it is “open” or “closed” access, its colour scheme, the format governing how the questions will be presented (one at a time, group by group, all at once), etc.
5. **Responses** - the actual responses supplied by your respondents as they complete the survey.

This document describes how you can configure selected aspects of your survey's **metadata**. For more information on metadata please consult the [relevant portion of the LimeSurvey User Guide](#).

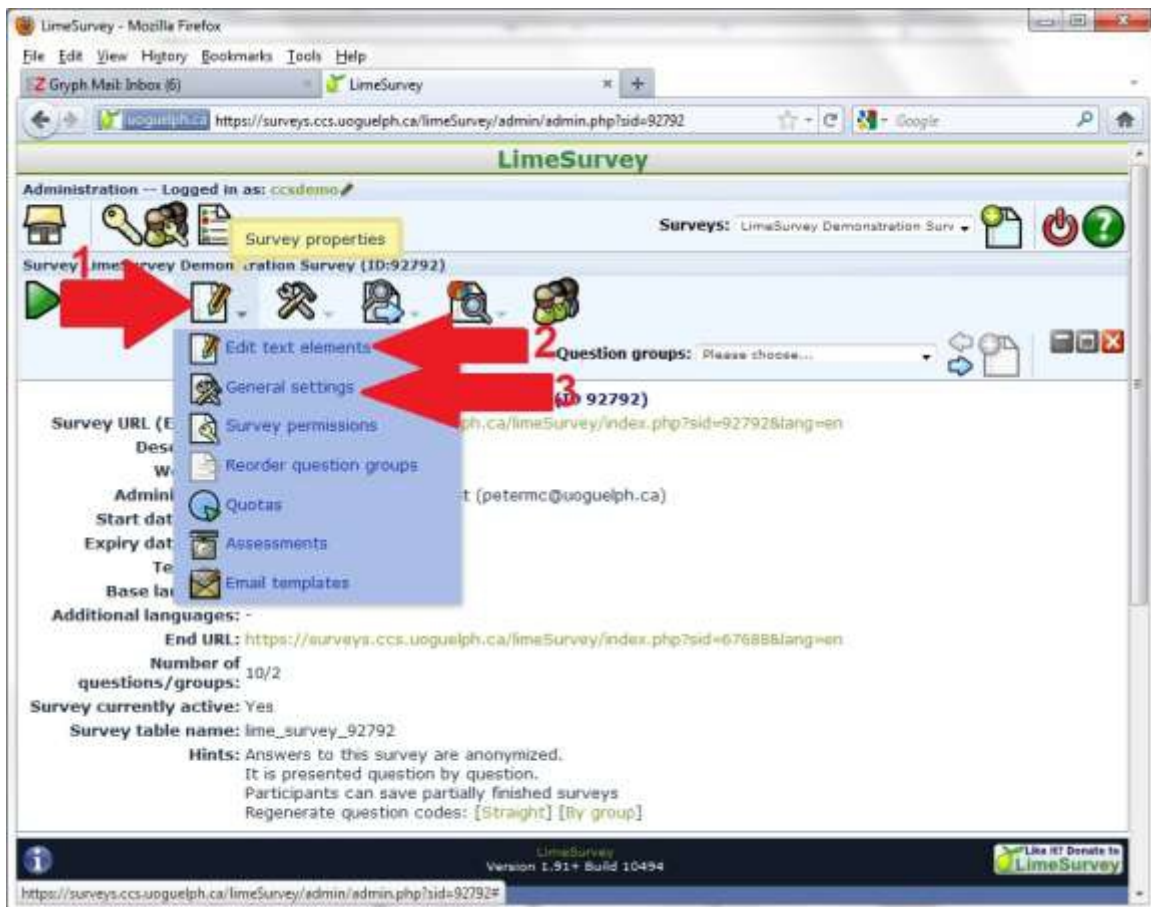
CATEGORIES OF METADATA

Your survey's metadata is organized into two categories:

1. **Text elements** - these are the survey's Title, Description Message text, Welcome Message text, End Message text, URL of the web page to transfer the respondent to after they submit their survey, etc.
2. **General settings** - these settings control the survey's access mode, colour scheme, presentation format, etc.

To access your survey's metadata, click the *Survey properties* icon on the *Survey* toolbar and then select either the *Edit text elements* or *General settings* choices that appear on the resulting sub-menu. In Figure 1 below, the *Survey properties* icon is pointed to by red arrow 1. The *Edit text elements* choice on the sub-menu is pointed to by red arrow 2. The *General settings* choice on the sub-menu is pointed to by red arrow 2.

Figure 1: How to access your survey's metadata



SECTION I: CONFIGURING THE TEXT ELEMENTS OF YOUR SURVEY

After selecting the *Edit text elements* choice in Figure 1, the form shown in Figure 2 appears. (Recall that in LimeSurvey you supply specific information by completing forms. The form always appears beneath the lowest toolbar. You click the form's associated *Save* button to save your configurations. The *Save* button is always at the bottom of the form. The text on the *Save* button varies slightly for different applications).

Figure 2: The form that appears to let you edit your survey's *Text elements* metadata.

The screenshot shows the 'Text elements' metadata configuration form in LimeSurvey. The form is divided into several sections, each with a text editor interface. Red arrows numbered 1 through 6 point to specific elements:

- 1**: Points to the **Survey title** field, which contains the text "LimeSurvey Demonstration Survey".
- 2**: Points to the **Description** text editor area, which is currently empty.
- 3**: Points to the **Welcome message** text editor area, which is currently empty.
- 4**: Points to the **End message** text editor area, which contains the text "Thank you for taking our survey !".
- 5**: Points to the **End URL** field, which contains the URL "https://surveys.ccs.uoguelph.ca/limeSurvey/index.php?sid=67688&lang=e".
- 6**: Points to the **Save** button at the bottom of the form.

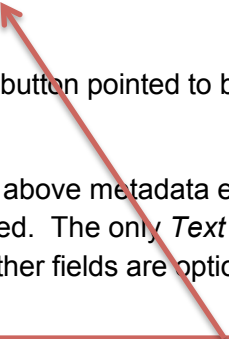
Other visible fields include **URL description** (empty), **Date format** (set to "dd.mm.yyyy"), and **Decimal separator** (set to "Dot (.)").

Referring to Figure 2 above:

Content entered on the above form appears on the opening page of your survey. In LimeSurvey terminology, the opening page is referred to as the *Welcome* page.

- a) Enter the text for your survey's *Title* in the field pointed to by red arrow 1. LimeSurvey's templates, with the exception of the *Guelph Title Blank* template, display the *Title* at the top of each page of your survey.
- b) Enter the text for your survey's *Description Message* in the field pointed to by red arrow 2. Any content entered here will be displayed at the top of each page on your survey, beneath the *Title*.
- c) Enter the text for your survey's *Welcome Message* in the field pointed to by red arrow 3. Any content entered here will be displayed on the opening page of your survey, beneath the *Title*.
- d) Enter the text for your survey's *End page* in the field pointed to by red arrow 4. Any content entered here will be displayed after your respondent clicks the Submit button to submit their response. Note that this content will not be displayed if you redirect your respondents to a URL after they click the Submit button as explained in point e.
- e) Enter the URL of the web page you wish your respondent transferred to in the field pointed to by red arrow 5. If you enter a URL in this field the respondent will be transferred to this URL after they click the *Submit* button to submit their response.
- f) Click the form's *Save* button pointed to by red arrow 6 to save your configurations.

Note that you can modify the above metadata elements as often as you like, even once your survey has been activated. The only *Text elements* metadata field that must have content is the Title field - all other fields are optional.



See here for instructions on how to use the End URL to automatically credit participants in Psych Research Pool courses:

<http://psychresearch.ucsc.edu/concrete5/index.php/researchpool/researchers/surveys/limesurvey-autocredit/>

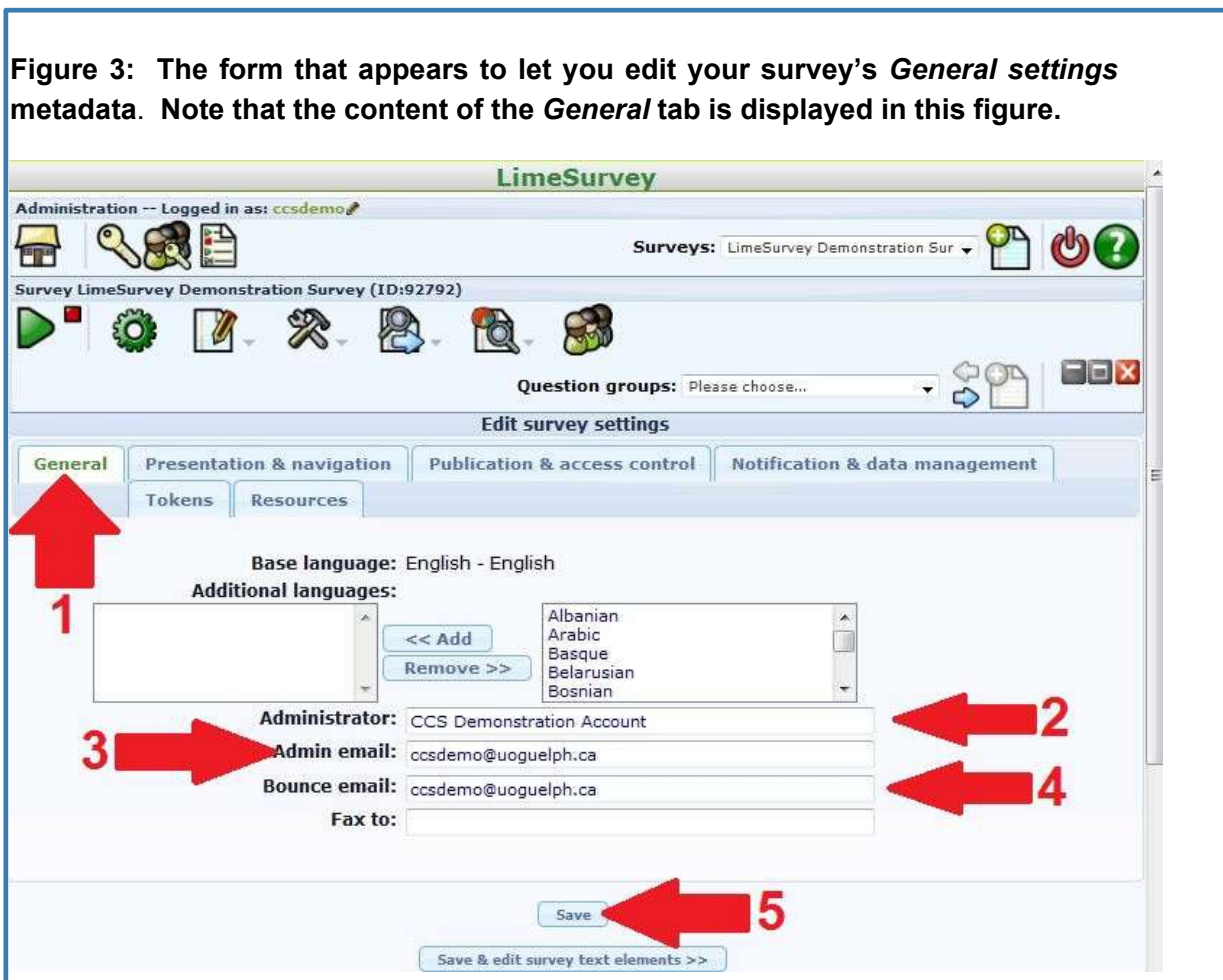
SECTION II: CONFIGURING THE *GENERAL SETTINGS* OF YOUR SURVEY

After selecting the *General settings* choice from the sub-menu in Figure 1, the form shown in Figure 3 appears. The metadata elements in the *General Settings* category are more numerous and so they are organized on six separate tabs on the form. The *General* tab is always the active tab when the *General settings* sub-menu is first accessed. The *General* tab is pointed to by red arrow 1 in Figure 3.

When configuring your survey's *General settings* metadata you will be working with the contents of the *General*, *Presentation & navigation*, *Publication & access control*, and *Notification & data management* tabs. Normally you will not be modifying metadata elements on the *Tokens* and *Resources* tabs.

Section II:1 Metadata found on the "General" tab.

Figure 3: The form that appears to let you edit your survey's *General settings* metadata. Note that the content of the *General* tab is displayed in this figure.



The screenshot shows the LimeSurvey administration interface. At the top, it says "LimeSurvey" and "Administration -- Logged in as: ccsgdemo". Below that, there are navigation icons and a "Surveys" dropdown menu. The main content area is titled "Survey LimeSurvey Demonstration Survey (ID:92792)" and "Edit survey settings". There are six tabs: "General", "Presentation & navigation", "Publication & access control", "Notification & data management", "Tokens", and "Resources". The "General" tab is selected and highlighted with a red arrow labeled "1". Below the tabs, the "Base language" is set to "English - English". The "Additional languages" section has a list of languages: Albanian, Arabic, Basque, Belarusian, and Bosnian. There are "Add" and "Remove" buttons. The "Administrator" field is set to "CCS Demonstration Account" and is pointed to by a red arrow labeled "3". The "Admin email" field is set to "ccsgdemo@uoguelph.ca" and is pointed to by a red arrow labeled "2". The "Bounce email" field is also set to "ccsgdemo@uoguelph.ca" and is pointed to by a red arrow labeled "4". The "Fax to" field is empty. At the bottom, there is a "Save" button pointed to by a red arrow labeled "5" and a "Save & edit survey text elements >>" button.

Referring to Figure 3 above:

- a) The active tab is the *General* tab, as pointed to by red arrow 1.
- b) Enter the name of the survey's administrator in the field pointed to by red arrow 2. This content can be used in the various email templates if you associate a token table with your survey - in the email templates it's placeholder name is: {ADMINNAME}
- c) Enter the email address of the survey's administrator in the field pointed to by red arrow 3. This content can be used in the various email templates if you associate a token table with your survey - in the email templates it's placeholder name is: {ADMINEMAIL}
- d) Enter the email address you want undeliverable email messages to be sent to, in the field pointed to by red arrow 4. The content of this field is used when you have a token table associated with your survey, and you send invitation, reminder, etc. emails to people in the table. Email messages that cannot be delivered to a recipient (i.e. "bounced") are returned to the email address specified in this field.
- e) Click the form's *Save* button pointed to by red arrow 5 to save your configurations.

Note that you can modify the above metadata elements as often as you like, even once your survey has been activated.

Section II:2 Metadata found on the "Presentation & navigation" tab.

Figure 4: The form that appears when you click the *Presentation & navigation* tab.

Edit survey settings

General **Presentation & navigation** Publication & access control Notification & data management

Tokens Resources

1 ↑

Format: Question by question **2** ←

3 → Template: Guelph_cornerstone

Template preview:

CSLI demonstration survey

A note on privacy
This survey is anonymous.
The record kept of your survey responses does not contain any identifying information about you unless a specific question in the survey has asked for this. If you have responded to a survey that used an identifying token to allow you to access the survey, you can not account for the identifying token is not tied with your responses. It is managed in a separate database, and will only be updated to indicate that you have (or haven't) completed this survey. There is no way of matching identification tokens with survey responses in the survey.

← **4** Show welcome screen? No

Navigation delay (seconds): 0

← **5** Show [<< Prev] button Yes

Show question index / allow jumping No

Keyboard-less operation No

← **6** Show progress bar No

Participants may print answers? No

Public statistics? No

Show graphs in public statistics? No

← **7** Automatically load URL when survey complete? No

Show "There are X questions in this survey" No

Show group name and/or group description Hide both

Show question number and/or code Hide both

← **8** Show "No answer" No


← **9** Save

Save & edit survey text elements >>

Important: Please always set these to NO!

Referring to Figure 4 above:

- a) The active tab is the *Presentation & navigation* tab, as pointed to by red arrow 1.
- b) Select the *Format* for the display of your questions from the drop-down list pointed to by red arrow 2. From the choices shown when you click the drop-down arrow: selecting "Question by question" will display each of your questions on a separate page. Selecting „Group by group" will display all of the questions in a group on the same page, and use a separate page for each group. Selecting "All in one" will display all your survey's questions on one page.
- c) Select the *Template* for your survey from the drop-down list pointed to by red arrow 3. The template controls the basic colour scheme and the images that appear at the top of each page.
- d) Select whether or not you wish the *Welcome* page displayed when your respondents access your survey, from the drop-down list pointed to by red arrow 4. The "text elements" of your survey are displayed on the Welcome page.
- e) Select whether or not you wish the <Previous> button to be shown to your respondents, from the drop-down list pointed to by red arrow 5. The <Previous> button lets your respondents return to questions displayed on previous pages, when completing your survey.
- f) Select whether or not you wish the *Progress bar* displayed to your respondents, from the drop-down list pointed to by red arrow 6. The progress bar provides a visual indication of how far the respondent has progressed through the survey. **Note** the *Progress bar* is currently only available with the *Guelph cornerstone and colours* template.
- g) Select whether or not you wish the respondent to be automatically transferred to the *end URL* (specified in Figure 2) when they click the "Submit" button to submit their survey. You can make this choice from the drop-down list pointed to by red arrow 7.
- h) Select whether or not you wish the *No answer* choice to be automatically added to lists of answer options for questions such as the *List* type. You can make this choice from the drop-down list pointed to by red arrow 8. This choice is only in effect for non-mandatory questions.
- i) Click the form's *Save* button pointed to by red arrow 9 to save your configurations.



Questions you set as mandatory will automatically have a No Answer choice.

Section II:3 Metadata found on the "Publication & access control" tab.

Figure 5: The form that appears when you click the *Publication & access control* tab.

Important:
Please always
set these to NO!

1

2

3

4

Save

Save & edit survey text elements >>

Referring to Figure 5 above:

a) The active tab is the *Publication & access control* tab, as pointed to by red arrow 1.

b) If you wish to give your survey a *specific start date and time*, enter this information in the field pointed to by red arrow 2. (Note you can select the date from a calendar by clicking the ellipsis button. Enter the date and time as:

dd.mm.yyyy hh:mm (the time is expressed in 24 hour format)

e.g. *July 21, 2011 starting at 1:30 p.m.* would be entered as:

21.07.2011 13:30

c) If you wish to give your survey a *specific ending date and time*, enter this information in the field pointed to by red arrow 3. (Note you can select the date from a calendar by clicking the ellipsis button. Enter the date and time as:

dd.mm.yyyy hh:mm (the time is expressed in 24 hour format)

e.g. *July 25, 2011 ending at 5:00 p.m.* would be entered as:

25.07.2011 17:00

- d) Click the form's Save button pointed to by red arrow 4 to save your configurations.

Section II:4 Metadata found on the "Publication & access control" tab

Figure 6: The form that appears when you click the *Notification & data management* tab.

Figure 6 shows the 'Edit survey settings' form, specifically the 'Notification & data management' tab. The form contains several configuration options with dropdown menus and text input fields. Red arrows numbered 1 through 10 point to specific elements:

- 1: Points to the 'Notification & data management' tab.
- 2: Points to the 'Send basic admin notification email to:' field.
- 3: Points to the 'Anonymized responses?' dropdown menu.
- 4: Points to the 'Save' button.
- 5: Points to the 'Date stamp?' dropdown menu.
- 6: Points to the 'Save IP address?' dropdown menu.
- 7: Points to the 'Allow editing answers after completion?' dropdown menu.
- 8: Points to the 'Participant may save and resume later?' dropdown menu.
- 9: Points to the 'Save timings?' dropdown menu.
- 10: Points to the 'Save' button.

Two callout boxes provide instructions:

- Set this to YES to protect your participants' privacy. (Points to the 'Anonymized responses?' dropdown menu.)
- Set this to NO to protect your participants' privacy. (Points to the 'Save' button.)

Referring to Figure 6 above:

- The active tab is the *Notification & data management* tab, as pointed to by red arrow 1.
- In the field pointed to by red arrow 2, enter the email address (if any) of the person who should receive a *basic notification* that a survey response has been submitted.

- c) In the field pointed to by red arrow 3, enter the email address (if any) of the person who should receive a *detailed notification* that a survey response has been submitted. The detailed response includes all replies the respondent made in the survey.
- d) In the field pointed to by red arrow 4, select if the survey should be *anonymous*. This setting only applies to surveys using a token table. If the survey is set to "anonymous" the token table entry will only show if a respondent has or has not completed the survey. Further, there will be no linkage between the response and the information in the token table for the respondent. **Set this to YES.**
- e) In the field pointed to by red arrow 5, select if the response should be stamped with the *date and time of its submission*.
- f) In the field pointed to by red arrow 6, select if the response should be stamped with the *I.P. address* from which it was submitted.
- g) In the field pointed to by red arrow 7, select if respondents should be able to return to their survey after they have submitted their response, to *review/edit* their responses.
- h) In the field pointed to by red arrow 8, select whether the *time taken* by the respondent to complete the various questions is recorded along with the responses. This setting is only valid when the survey is presented in "Question by question" format, and can be affected by network factors as well as settings in the respondent's web browser.
- i) In the field pointed to by red arrow 9, select whether the respondent may *save their survey* and return to it later to continue supplying responses.
- j) Click the form's *Save* button pointed to by red arrow 10 to save your configurations.