How to Build a LimeSurvey: The Basics for Beginners

Login and view a list of your surveys. We will give you 3 templates to start with. These are the ethics compliant templates you need to protect participant anonymity.

We recommend using the basic survey template to get started instead of creating your own survey. The basic template has a sample group and a sample question. It also has a built-in Yes / No Consent question group.

If you have or intend to have ethics clearance – for sure – please start with the basic survey template.

Top right menu item that has your MacID or username – go there to change your password.

There are 2 ways to list surveys when you login. Under the <Surveys> drop down list select “List surveys”, or the red box near the centre of the screen under the McMaster logo has a link called “List available surveys”.

Figure 1: Your entrance screen. Near your account name you can change your password.
Figure 2 List of Surveys that you own in your account

Click on a Survey title to go to the tools to edit and build your Survey. We recommend starting with the basic survey template. You can link it up to the other templates later, if you have a draw or want to ask participants if they want a summary of your research.
Now you are ready to design and build your survey. It is always advisable to have your survey questions in draft form in a Word or Excel Document because to a certain degree you can copy and paste into LimeSurvey. It also helps you design your survey question types which will make it easier for you to select the LimeSurvey types that best match your survey.

Important features here:

**Activate this survey** – Don’t click this until you are absolutely sure that you are done testing. Better sometimes to make a copy of your survey and activate a test for that that before activating your final real survey. To make a copy go to the very top right menu <Surveys> and select <Copy a survey>.

**Preview Survey** – click it anytime to see what the survey will look like and to test the questions. In fact, you should click it every time you add a question or group to see what it looks like.

**List Question groups** – The place to add and edit groups. A group of questions is how they will present to your participants. You don’t want 40 questions in one group scrolling down the screen forever.

**List Questions** – The place to add and edit new questions.
Question organizer – Extremely useful tool where you can drag and drop questions into different groups.

Question Explorer – Exactly as it sounds – very useful to access and edit questions and add them to groups.

Figure 4: Selecting the List Question Group feature

The basic survey template provides you with two groups already. Select List question groups to see them.
Before we add groups and questions let’s look at another very important feature – **Survey properties**. This can be the first thing you can start with to build your survey. Select **General settings & texts**. You can mostly ignore the other items in the list because they start to get a bit more advanced. You can always ask us about them.

The other menu items in that horizontal row are more useful once you survey is activated and you want to analyze and export your data. This is a really powerful component of LimeSurvey.
If you use the basic survey template you don’t need to worry about putting text in Description or Welcome message. You edit the text for the template sample language in Preamble and Consent as a question in the survey. Here you just want to change the *Survey title* to the title you want your participants to see. Remember to *Save* or *Save and Close* to keep your edits.

On the right menu, the Format option in General Options is interesting. If you want your survey to present just one question at a time, you can select Question by question. The Default, and best option, is *Group by group*. 
If you scroll down to the bottom of the General Settings & Text page, you will find the **End URL**. The End URL is very important. This is where you would put in the hypertext link where you want the participants to go when they submit your survey. If you want to ask them to enter their contact information for a draw or follow-up interview – both of which are ethics templates we provide you – then first edit one of them, activate it, then copy and paste the URL for it into the End URL here.

In the right menu there are more very rich features:

- **Allow backward navigation** – turn this on and it will add a `<Previous>` button to accompany the default `<Next>` button on your group of questions.
- **Show group name and/or group description** – you can show the title for your groups or hide them. Learn about groups first before using this. Essentially it means if you have a group of questions on demographics, and the name of your Group in LimeSurvey is Demographics, you can select here whether or not you want to display this as a title to your participants.

Don’t forget to Save or Save and Close.
Figure 8: Automatic Load Additional Surveys

Also in the **Presentation & navigation** area is the **VERY IMPORTANT** switch called “**Automatically load URL when survey complete**”. This will automatically take the participant to the Draw or Follow up survey. This is the whole purpose of the Ethics board creating 3 compliant templates. Entering data in the second (and if the similar process is followed) or the third survey, will protect confidentiality of participant survey responses form being lined to their personal contact information.
Returning to the design and build of your questions and groups.

Click **List question groups**. Now you can see & edit your question groups. Just leave the Preamble and Consent group though you can change the title if you wish.

You do want to rename the sample question group. Do that now. Remember, participants will be able to see the Title of your question groups (unless you hide the title through the General Settings & Text page, so keep it relevant for the questions they will be asking. Click the pencil icon to the right to edit it. Don’t forget to Save and Close after that.
Edit the second group by clicking the pencil icon.
This is the renamed question group. You can mostly leave the description blank. **TIP: Preview your groups, questions and entire survey as you go along.** Take note that you will not be able to preview a survey if you create a question group but leave it empty, that is, with no questions in it.

This is where you will do most of your work, especially if you have 70 questions in your survey! The red box with plus sign is inside the box on the left centre screen is clickable if you want to add a new question.
This is where you will do most of your question adding and editing.

If you click the **List questions link**, you see a list of your questions. This can get quite extensive if you keep adding questions. The column titles are clickable to help sort them (very useful to sort by question code). For example, if you click the column title **Code**, it will sort in descending alphabetical order all the question codes.

Start by editing the **[Test question]** – click the pencil tool to the right.

You can also start by editing the Preamble and Consent text if you wish. Preview it too to see what it looks like. You can copy and paste wordings here, but a lot of the wordings are samples that you can use.

Look also at the top of the Left menu and you will see the **Add new question** button. That is where you can add a new question.
Clicking the **pencil tool** will take you to the question editor and question type selector. Clicking the eye icon will preview the question only. Please take note of the question code. It is useful to work out a question code naming system in advance.
Figure 15: Question types

The steps here are:

1. Give your question a **code** and remember it! The next question you add should be the next number or code in sequence.

2. Copy and paste in your **question** from your Word document, or just type it in freehand in the Question text area. You can format using the text editor.

3. Select your question type in the right menu under **General Options** from the drop down list called **Question type**. LimeSurvey will have an “image over preview” of the question types that are available. Try looking through all of them to find the best structure for your design. We created an online sample survey using all the question types so you can actually see what they look like. It can be accessed on our LimeSurvey page, but here is the link:

Figure 16: Selecting a question type

This is why you need to design your survey in advance so you know what your questions and your answers are and how you want that configured.

Once you select a question type don’t forget to save it in the correct question group. If you forget to do that at this point, you can use the Question organizer later to drag and drop the question into the correct group. Save and close the question into the correct question group.
Editing answer options is a page where many users get lost or don’t know how to access. It is hard to find later, even from the Question list. Look for the expanded menu item at the top under your survey name and Id for options to edit and design your question and answers. Click <Edit answer options>
This drop down list question has basic sample answers. You can edit, delete or add to the list.

If you decide you want to change the question type – not use these radio button option answers – you have to go back to the List questions, select the pencil edit tool, and select a new question type. You may or may not need to put in your answers again.
Figure 19: Question Explorer

You can also use the Question Explorer tool at the left menu to find your questions and the edit menu, such as this figure 15.
The **Question organizer** is a powerful tool when you start to develop larger surveys with many questions and groups. Just click on a question and **drag and drop** it into a different group to change the order of your questions. It is up to you if you want to rename the question codes after you change the order.
Figure 21: Preview your survey

You have to **preview** and test your survey as many times as you can. This will help you see errors and to understand the flow of your survey. Do this many times before you finally **Activate this survey**. Once activated, it is difficult to go back and change some of the survey. You can do text edits, but there are limitations in what you can change.
If you use the ethics basic survey, in preview mode, the **No I do not agree to participate** option will still go to the first survey question. Once your survey is activated, and you click No, you will be taken to a page that says that no data has been collected from you but thank you for your interest (or whatever end statement you wish, as you can edit this).

Try creating a New Survey and experiment not using the templates.

Play around with LimeSurvey! Have Fun!

If at any time you have any questions, please contact us:

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