

Student & Enquete

User Manual for version 1.0

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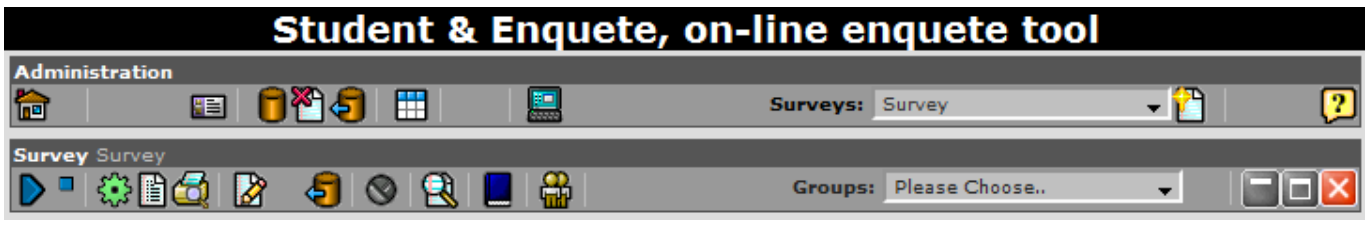
Den Haag, January 2009

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Survey Design and Structure

A survey in *Student&Enquete* Surveyor has three integral elements. Every survey must have:

- A survey name
- At least one group
- At least one question

Optional elements to a survey include:

- A list of answers to applicable questions
- Modifiable labels
- Conditions that determine whether a question should or should not be displayed

The **Survey Name** is fairly self-explanatory. This is the name of the survey, and the place where various options are set that relate to the survey as a whole. Options such as the ?welcome? message, the ?description? of the survey, contact information for the survey administrator, what ?format? the survey will appear in, and so forth.

Each survey divides the questions into **groups**. This allows for logical organisation of the survey into groupings of similar questions. A group has a title and an optional description. You must have at least one group in each survey, even if you don?t wish to divide the survey into multiple groups.

Questions are the core of your survey and fit into a group, as explained above. There are no technical limits to the number of questions you can have in your survey, or the number of questions per group. Questions include the actual question itself, as well as settings that determine what type of answer you expect. You can also include a short ?help? explanation for each question and determine whether the question is mandatory (ie: must be answered before continuing).

Question Types

The different types of question available in Surveyor are as follows:

- **5 Point Choice:**

Allow a single rating of between 1 and 5 for the question at hand.

Eg: How much do you like fried eggs (1 for none, 5 for lots)

-

- **Date:**

Enter a date

Eg: What is your birthdate

-

- **Gender:**

Offers participants a pre-defined gender option:

Eg: Are you male or female?

-

- **List**

Allows you to add a series of possible answers / options from which the survey participant may choose only 1

Eg: Where do you sleep?

*Bed
Couch
Floor*

- **List with Comment**

Allows you to add a series of possible answers / options from which the survey participant may choose only one. The question includes an area to explain the choice.

Eg: Where do you sleep? Please explain why you sleep there.

*Bed
Couch
Floor*

-

- **Multiple Options**

Allows you to add a series of possible answers/options from which the survey participant may choose any that apply (ie: none, one or more).

Eg: Where do you like to sleep (choose any that apply)

*Bed
Couch
Floor*

-

- **Multiple Options with Comment**

Allows you to add a series of possible answers/options from which the survey participant may choose any that apply, as well as add a comment explaining each choice!

Eg: Where do you like to sleep (choose any that apply). Please explain each one you choose.

*Bed
Couch
Floor*

-

- **Multiple Short Text**

Allows you to ask for multiple short text answers to match a series of pre-defined titles.

Eg: What are your three favourite books?

*Book 1
Book 2
Book 3*

-

- **Numerical Input**

Requires an answer that contains only numbers. These questions will only accept the following characters: 1 2 3 4 5 6 7 8 9 0 , .

Eg: What is your age in years?

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Also on www.scholierenenuete.nl www.scholierenonderzoek.nl www.studentenonderzoek.nl

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-
- **Ranking**

Allows you to present your participants with a list of possible answers/options, which they may then rank in order of preference

Eg: Please rank the following movies in order of your preference:

-
- **Short Free Text**

Allows a short answer (100 Characters Maximum)

-
- **Long Free Text**

Allows a long text answer

-
- **Yes/No**

Presents the participant with a simple Yes / No option

-
- **Array (5 Point Choice)**

Allows you to present your participant with a list of possible answers/options which they may then rank between 1 and 5

Eg: To what extent do you agree with the following comments (1=Strongly Agree, 5=Strongly Disagree)

- Elephants look better with large ears	1	2	3	4	5
- The Southern Hemisphere is groovy	1	2	3	4	5
- My ears hurt when it is cold	1	2	3	4	5

-
- **Array (10 Point Choice)**

The same as above, only with 10 instead of 5

-
- **Array (Yes/No/Uncertain)**

Allows you to present your participant with a list of possible answers/options against which they may respond ?Yes?, ?Uncertain? or ?No?

Eg: Do you agree with the following proposals:

- All staff should wear a pink uniform	Yes	Uncertain	No
- Coffee Breaks should be only 5 minutes	Yes	Uncertain	No
- My boss should be sacked	Yes	Uncertain	No

-
- **Array (Increase/Same/Decrease)**

As above, only presenting the options Increase/Same/Decrease.

-
- **Array (Flexible Labels)**

An array of flexible labels allows you to select from a pre-defined label (see section 5) as your headings, and let your participants respond to a series of possible answers/options using those headings.

Eg: Please rate the following proposals:

- My left arm is longer than my right	Preposterous	Unlikely	Possibly	Definitely
- The magnetism of the earth is changing	Preposterous	Unlikely	Possibly	Definitely
- My socks stay up all day	Preposterous	Unlikely	Possibly	Definitely

-
- **Array (Flexible Labels by Column)**

Basically the same as the Array (Flexible Labels) question, except the answers and labelset are displayed in columns instead of rows. So, for the same example as previously it would be laid out like:

Eg: Please rate the following proposals:


Preposterous	My left arm is longer than my right	The magnetism of the earth is changing	My socks stay up all day
Unlikely	My left arm is longer than my right	The magnetism of the earth is changing	My socks stay up all day
Possible	My left arm is longer than my right	The magnetism of the earth is changing	My socks stay up all day
Definitely	My left arm is longer than my right	The magnetism of the earth is changing	My socks stay up all day

- **Boilerplate**

This is not really a question at all, but more of a place holder that has the qualities of a question. No "answer" can be collected to a boilerplate question, however the question text will display as in other questions. You can use this in conjunction with the conditions tool to make comments or statements that display based on answers to previous questions.

Creating Surveys

Creating a NEW SURVEY

To create a new survey click on the  button at the right hand side of the administration button bar. The "Create New Survey" screen will appear below. Following is a description of each field:

1. **Title:** This is the brief descriptive name of the survey (ie: "Enterprise Survey 2008", or "Views on Ice Cream"). This title will be displayed on every page of the public survey script.
2. **Description:** This allows you to enter a description of the survey. (ie: "A survey to collect your ideas of the enterprise bargaining" or "A survey to find out the popularity of chocolate ice cream"). You can use html markup in this section.
3. **Welcome:** This allows you to enter a message that will display when a participant first logs into your public survey screen. (ie: "Thank you for taking the time to participate in this survey..") You can use html markup in this section.
4. **Administrator:** This is the name of the contact person who administrates the survey. It will be included in any emails sent out inviting participants to respond.
5. **Admin Email:** This is the email address of the administrator (as above) and is used as the 'reply to:' address on any emails sent out.
6. **Fax To:** This field is used to give a fax number on the "printable survey" - ie: when you want to send someone a hardcopy because they cannot use the online survey.
7. **Format:** Choose from "One at a time", "Group at a time" or "All in one".
 - **One at a time** Public survey will display one question per page.
 - **Group at a time** Public survey will display all questions in a group per page. Group at a time surveys still have a separate "welcome" page and "submit" page, like "One at a time" surveys.
 - **All in one** Public survey will display all questions in one single page. All in one surveys do not have a "welcome" page or "submit" page - the welcome message and submit button all appear on the same page.
8. **Template:** Choose from the installed templates in your system. The default template is rather dull, but functional. More information on creating your own templates send a email to support@studentenquete.nl
9. **Use Cookies?:** If you choose "Use Cookies" and your survey does not use a tokens table to control participant access, then a cookie will be saved to the client computer of each survey participant once they have submitted a survey. This cookie will stop the same computer from accessing the survey more than once. There are inherent limitations in the 'security' strenght of such a system, but on a general basis it allows public surveys to retain some control over multiple entries.
10. **Allow Saves?:** If you set this option to "Yes" then users can save unsubmitted surveys and return to them later.
11. **Show [<< Prev] button:** This option defaults to yes, however if you set it to "No" then users will not have the option of moving to a previous page while completing the survey.
12. **Notification:** Options to allow the administrator to be emailed when each individual survey response is saved. You can choose from:
 - **No email notification** - self explanatory
 - **Basic email notification** - an email is sent informing the administrator that a survey response has been saved
 - **Send email notification with response codes** - sends the full answers to the survey after saving

13. **Anonymous:** This allows you to determine whether responses to your survey are matched up with information from your surveys tokens table, or kept 'anonymous'. The default is yes. If you choose "No" for anonymous, you must also have a tokens table for your survey when you activate it.
14. **Invitation Email Subject:** The subject line for the invitation email that gets sent out when tokens are used with your survey.
15. **Invitation Email:** This is the text for the invitation email that gets sent out when tokens are used with your survey. This is initially filled by the default invitation message (from the language files) but you can modify it to suit yourself. Of course if you don't plan to use tokens on your survey, whatever is in this field is irrelevant.
You can use the following "form" fields to insert individualised information in each email:
 - {FIRSTNAME} - gets replaced with the token table's "firstname" value
 - {LASTNAME} - gets replaced with the token table's "lastname" value
 - {SURVEYNAME} - gets replaced with your surveys name
 - {SURVEYDESCRIPTION} - gets replaced with your surveys description
 - {ATTRIBUTE_1} - gets replaced with the token table's "attribute_1" value
 - {ATTRIBUTE_2} - gets replaced with the token table's "attribute_2" value
 - {SURVEYURL} - gets replaced with the fully qualified URL to this particular survey

Note that these "form fields" apply to the following email fields.

16. **Email Reminder Subject:** The subject line for the reminder email that gets sent out from the tokens tool
17. **Email Reminder:** This is the text for the reminder email that gets sent out when tokens are used with your survey. See "invitation email" for specific details on how this field is used.
18. **Confirmation Email Subject:** When tokens are used, this is the subject line of the email that gets automatically sent to participants after completion of the survey
19. **Confirmation Email:** This is the text of the email that gets sent to users after completion of the survey.
20. **Allow Public Registration:** If you use tokens to control access to your survey, the only people who can use the survey are those who have an entry and a unique token from the token table. If you would like to use the tokens but allow public registration, use this field. Setting "Yes" to this will allow a visitor to your Survey URL to register their name and email address. The script will create a new entry in your tokens table for this person, then send them an invitation email. The script will ensure that only one person per email address can complete your survey.
21. **Public Registration Email Subject:** This is the subject line for the invitation email sent to members of the public who register for a survey.
22. **Public Registration Email:** This is the text for the invitation email sent to members of the public who register for a survey. The same "form fields" apply in this email as in the earlier ones.
23. **Token attribute names:** The tokens table has two "spare" fields for storing additional information about users. When using the public registration system, you can use these two fields to give your attribute fields a nice name for the public. So, if you are using "attribute_1" to store the participants department name, you can label it appropriately.
24. **Datestamp?:** This field allows you to determine whether the survey will datestamp all responses. If you choose "Yes", then when a response is submitted, a field will be included in that response indicating the time and date that the response was made. (See configuration settings for \$timeadjust setting.)
25. **Language:** A list of the possible language files will be shown next to this option. Changing the language setting here will change the default language used when participants use the public survey scripts (but will not change the administration language).

26. **Expires:** This is the last date on which the public survey script will let people participate. (Read this twice... if you set it for the 31 of December, then people will no longer be able to use the survey script on the 1st of January).
27. **End URL:** This URL will be presented as a link at the end of the survey, and allows you to direct your participants back to your home page (or, in fact, anywhere).
28. **URL Descrip:** The description for the link using the End URL.
29. **Automatically Load URL when survey complete:** If you choose "Yes" for this option, the script will automatically load the URL as set in "End URL" after completion of the survey, instead of displaying the usual "Completed" page. Do not use this if you are using assessments.

Importing a Survey

If you have previously exported a survey, you can import it from the "New Survey" screen. Click on the browse button to choose the sql file, and then click on the button. The import process reads a 'sql' file created by Surveyor and 'intelligently' (I use the term advisedly) rennumbers the survey, group, question, answer and condition id's so that they all match each other. See section on [Exporting a Survey](#) for more information.

Creating a NEW GROUP


Before you can add any questions to your survey you must create a **group**. If you will only have one group in your survey, then how you name this group is irrelevant (except of course for show). If, however, you are going to have multiple groups, you should note that the survey questions will be displayed by group, and the **groups will be displayed in alphabetical order**.

So, if you really need the groups to be displayed in a particular order, consider naming them with an alphabetic start such as "A) Questions about you" and "B) Questions about health". Doing it this way will ensure that your groups are displayed in order. If, for example, you entered the group names as "Questions about you" and "Questions about health", the "Questions about health" group will display first, because alphabetically it comes first.

The Surveyor is designed to do this deliberately, because it allows you to add extra groups in later, and arrange their positioning by adjusting the title. For example, you could squeeze an extra group between the two by naming it "A1) Questions about your history".

You can create as many groups as you like.


Groups can also include a "description". This field allows you to publish an explanatory note for any set of questions. If you add a description, then when the public are using the public survey system, they will be presented with that explanation before commencing any of the questions in that group. If you do not include any text here, then public participants will simply move on to the first question in the group with no stop.

Create a new group by clicking on the  icon in the Survey Button Bar.

You can use the groups to display more questions on one page. This limits the quantity of clicks. So you group all questions about e.a. "personal information" together then different parts of your survey you can group.

Adding a QUESTION

Once you have created your groups, you can start adding **questions** within each group.

Create a new question by clicking on the add icon () on the right hand side of the "Group" menu bar.

When adding a question, you will be asked for a "Question Code", the "Question", "Help" and a "Question Type". All new questions are assigned to the Group you were viewing when you clicked "Add Question", however you can change the group the question belongs too at a later point.

30. **Question Code:** Your ID, or number or code for the question. This field is important, because the entry in this will determine the positioning of the question in your survey. Again, numbering this "Q1", and following questions "Q2" and "Q3" will ensure that they appear in the correct order. Using this system allows you to add in extra questions as an afterthought by giving them a code such as "Q1a". Try to be consistent with your coding in this field. Planning makes this process a lot easier.
31. **Question:** This is the actual question being asked. There is no real limit to the length of the question here, however if you want to explain the question, leave that for the next field.

Fields Within Questions

TOKEN INFORMATION

From Student & Enquete you can insert information/text from the tokens table into your question so that it can show context related information. For Student & Enquete to do this, the survey needs to be set as NOT Anonymous (ie: tracked), and it needs to have a tokens table.

The fields available for this are:

- {TOKENS:FIRSTNAME} - inserts the value from the "firstname" field in the tokens table
- {TOKENS:LASTNAME} - inserts the value from the "lastname" field in the tokens table
- {TOKENS:EMAIL} - inserts the value from the "email" field in the tokens table
- {TOKENS:ATTRIBUTE_1} - inserts the value from the "attribute_1" field in the tokens table
- {TOKENS:ATTRIBUTE_2} - inserts the value from the "attribute_2" field in the tokens table

To use this functionality you must type the field text into your question exactly as listed above. For example:

Hello {TOKENS:FIRSTNAME}. We sent an email to you using this address {TOKENS:EMAIL}. Is this correct?

If there are spaces or typing mistakes, the script will not replace your field with the appropriate information.

PREVIOUS ANSWERS

There is currently also the capacity to insert the answer of previous questions into the text of an answer with the following provisos:

- The question must have been answered in a previously displayed PAGE in the survey - answers to questions on the current page are not available
 - You refer to the exact Survey ID, Group ID and Question ID for the question to which the answer was made - in the form: {INSERTANS:SIDXGIDXQID} - ie {INSERTANS:1X2X3}. How to find out the according ID? It's easy. Just navigate to the questions whose answer you would like to use and look at the adress-bar of your browser. If the URL is e.g. <http://www.studentenenquete.nl/phpsurveyor/admin/admin.php?sid=1&gid=12&qid=8> then you have to insert {INSERTANS:1X12X8} in the later question text.
32. **Help:** This is an optional field. It is useful if a question needs some explanation, or you want to explain how it should be answered. When you put text in this field, a "Question Mark" icon appears on the survey entry screens, and clicking on this allows the survey participant (or data entry person) to read the help.
33. **Question Type:** This determines the type of response the survey allows. View the "[Question Types](#)" section for a description of the various options available.
34. **Validation:** This feature is available on all free text type questions ("Short Free Text", "Long Free Text", "Date" or "Numerical"). You can use standard Perl Regex expressions in this field to validate the responses to the question, and if the responses don't validate against this expression, the user will be prompted to try again before they can progress.
Perl Regex expressions must start and finish with a forward slash ("/"). You can find a good library of regex expressions at <http://www.regxlib.net/>. These patterns will almost all work if surrounded with the forward slash.

Examples (note that these are all one line):

- *Email Validation:*
`/(\w[-._w]*\w@\w[-._w]*\w\.\w{2,3})/`
 - *Australian Postcodes:*
`/^[0-9]{4}/`
 - *US Phone Number:*
`/^(?:\([2-9]\d{2}\)\ | [2-9]\d{2}(?:\ |))[2-9]\d{2}[-]?\d{4}$/`
 - *Australian Phone Number:*
`/^(?:\([0]\d{1}\)\ | [0]\d{1}(?:\ |))[8-9]\d{3}[-]?\d{4}$/`
 - *US Postal Codes:*
`/^[0-9]{5}([-]?[0-9]{4})?$/`
35. **Other?** Depending upon your chosen 'question type' this option may appear. It allows you to specify that an "other" option be presented in some of the list question types.
36. **Mandatory?** For all question types, except the text ones, this setting allows you to require users to answer the question, before they can move on to the next question.

Question Attributes.

Question Attributes are an extensible way of adding extra controls to the presentation and/or workings of questions. Additional question attributes can be developed relatively easily by PHP programmers and added to the list of options for a question.

Different question types have different possible question attributes. Each attribute can have a "value" attached to it. This value may indicate whether the attribute is applied or not (usually a "1" to apply), or it may indicate a value used by the attribute.

- **display_columns:**
This attribute is available for radio button list and multiple choice type questions. It allows you to display the answers for the question in more than 1 column. Add this attribute, and a value indicating the number of columns you wish the question to use.
- **hide_tip**
This attribute allows you to turn off the "tip" for certain question types. For example, List type questions will usually include a tip that says "Please choose one of the following". Adding the "hide_tip" attribute with any value will turn this tip off so that it will not display.
- **random_order**
This attribute applies to any question type that has a list of possible answers. It causes PHPSurveyor to ignore the existing order of those answers, and instead it orders the answers randomly. It is important to note that this random order will be reordered each time the question is displayed, so if someone returns to a question, the order will probably be different from the first time they saw it. Having the answers display randomly is useful to remove the possibility of bias from answers to questions.
- **code_filter**
Can be used to filter the answers displaying based on the answer to a previous question. The attribute was added for the purpose of being able to narrow down possible options.
- **permission**
Currently unused attribute that will eventually be integrated with the public display of results, so you can indicate whether a questions results are public or not
- **maximum_chars**
Available for text based questions. Allows you to set the maximum number of characters that can be entered for a text based question. Entering a value of, say, 20 will mean that the participant cannot enter any more than 20 characters as their answer.
- **text_input_width**
Available for short text and numerical text type questions. Sets the width of the html text box, but does not limit the number of characters that can be entered.

You can create as many questions as you like.

When you have created a question that uses pre-determined answers (ie: dropdown list) you can then add **answers** to that question.

Existing Conditions

The top part of the window shows any conditions already set for this question, and the bottom part allows you to create new conditions.

In the example above, Q04b ("Do you like being female?") is set to only display if the answer to the previous question Q04("What is your gender") is "F" (Female). You can delete this condition by clicking on the "Del" button.

New Conditions

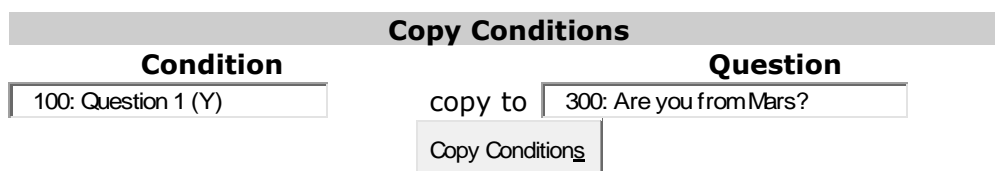
To create a new condition, click on the question (left hand column) that you wish to use for your condition. When you have chosen a question the Answer section on the right hand side will display the possible answers for that question. Choose the answer that you want to use, then click on the "Add Condition" button. You can choose multiple answers in one go by using the CTRL button and clicking on more than one answer in the right hand select list.

Multiple Conditions

You can set more than one condition to apply for a question. Conditions can be based on more than one previous question. So, for example, you can set a question to display only if the answer to Question 1 is "Y" and question 2 is "N". Or only if the answer to Question 1 is "Y" or "No answer" and the answer to question 2 is "N".

Copying Conditions to Later Questions

It is not uncommon for a group of questions to have the same condition. From release 0.98rc9 if you set a condition for one question, you can copy this condition to any subsequent question from the conditions designer. Once a condition has been set, the following screen will be displayed:



The select box on the left displays the conditions already set on this question, and the select box on the right shows all subsequent questions in the survey. Highlight all the conditions on the left side that you wish to copy (using the CTRL key to select multiples) and then highlight all the questions you wish to copy these conditions to on the right hand side (using the CTRL key to select multiples). Then click on the "Copy Conditions" button to copy them across. It is usually best to leave this until you have finished entering all your survey questions, and are satisfied with the question order.

Things to watch out for

If you set conditions on a question that, itself, has conditions, then there may arise occasions where the survey behaves in ways you might not have predicted. So if you are designing a complicated survey with large numbers of conditions, make sure you test the survey for as many different combinations of results as you can think of. In the above example, a question is displayed 'Do you like being male?' which has conditions set, and which will only display if the answer to "what is your gender?" is "M". If you were to add a condition to this question requiring a specific answer from the "Do you like being male?" question, then this question will never display, because the question "Do you like being male" will not be presented. If this seems confusing, don't worry too much, because when you are designing your survey the logics of these conditions will make themselves far more clear.


There are a few basic rules you should keep in mind before setting conditions on a question.

1. Once a single condition has been set for a question, that question WILL NOT DISPLAY unless that condition is met.
2. Conditions can only be set based on questions that appear BEFORE the question on which the condition is set.
3. Multiple conditions based on a single earlier question are evaluated using boolean "OR" principles. Multiple conditions based on multiple earlier questions are based on boolean "AND" principles. This is important because it means you

cannot (for example) set a condition that a question will only display if either previous question a is "Y" OR previous question b is "N".

4. You can modify conditions even after a survey has been activated. This should be done with caution, as there is no "consistency checking" applied here.


Adding ANSWERS

Various question types require you to add a list of 'answers' from which the survey participant chooses, or which are used as headings for responses. To add answers to one of these question types click on the  icon in question button bar.

When adding an answer you will be asked for an "Answer Code", an "Answer" and whether that answer is the "Default".

- **Answer Code:** This is the data that will usually be exported to your spreadsheet when compiling results. You may choose whatever code you want (5 character maximum). The code can only contain standard alpha-numeric characters.
- **Answer:** The answer that will be displayed.
- **Sortorder:** This is a hidden field in versions 0.98rc2 and better. You can use the "Up" and "Dn" buttons next to each answer to change the position of that answer in the list.
- **Default:** One answer from all can be chosen as the default answer (ie: this one will be chosen and entered into your survey results unless it is changed). Change the Default field to "Y" if you want this answer to be the default answer. If you don't choose any default answer the survey result will record nothing if one of the answers is not specifically chosen.

Exporting a survey

Naturally once you've finished a small masterpiece of a survey, with branching, hundreds of questions that has taken you 5 days to create you'll want to make a backup. The  button in the survey button bar will dump all the groups, questions, answers and conditions for your survey into a standard sql dump file. This dump file can be used with the '[Import Survey](#)' feature.

Testing a Survey

You can test a survey at any point while you are creating it, by choosing the "Test Dataentry" or "Test Survey" buttons in the 'Survey' section of the web page. This allows you to check how the survey looks and feels, before you actually initialise it. When testing a survey your responses will not be saved.

Assessments

A new feature in 0.99dev01 is the ability to create "assessments" on your survey. Assessments are rules which evaluate the responses to the survey immediately after it is submitted, and can then display text based on that.

As an example, consider the following. You have two questions in your survey, the first question asks if the user smokes: "Do you smoke?". The question has 3 possible answers, "Yes more than 10

per day" with an answer code of "10", "Yes, but less than 10 per day" with an answer code of "5" and "No, I don't smoke at all" with an answer code of "0".

The second question "Do you exercise?" has three possible answers; "Yes, I exercise for at least half an hour three times a week" with a value of "0", "Yes, I exercise every now and then" with a value of "5" and "No, I don't ever do any exercise" with a value of "10".

If we were to add the totals of the values for each possible answer at the end of the survey, we'd have a good indication of the general health of the respondent. Someone who smokes and doesn't ever do any exercise will have scored 10 in each of their answers, giving a sum of 20 when we add the values together. Someone who doesn't smoke and exercises regularly will have scored 0 in each of the answers with a total of 0 when we add the values together.

The assessments tool allows you to set some rules based on the summed values of the questions in the survey, either for the Total survey, or for each Group within the survey.

If we visit the assessments tool from the survey administration toolbar, we can create some assessments for this survey. From this screen you can view, edit or delete existing assessments or create new assessments.

If you create any assessments in this page, for the currently selected survey, the assessment will be performed at the end of the survey after submission

ID	SID	Scope	Group	Minimum	Maximum	Heading	Message	URL	Actions
11	35	T	94	20	20	You are very unhealthy	You are very unhealthy . You should stop smoking and start exercising	http://www.healthy.com/	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Add

Scope:

Group:

Minimum:

Maximum:

Heading:

Message:

URL:

In the "Add/Edit" box you can choose the following:

Scope: The scope of the assessment. Choose either "Total" which will create an assessment based on the sum of all the answers in the entire survey, or "Group" which will create an assessment based on the sum of all the answers in a group (chosen in the next row)

Group: If the scope of this assessment is for the current "Group", this is where you choose which group to assess.

Minimum: The minimum "sum" of answers to which this assessment will apply

Maximum: The maximum "sum" of answers to which this assessment will apply

Heading: The heading of the assessment which will display if this assessment is shown

Message: The actual message for this assessment (it may include html code)

URL: A URL link which will display with this assessment.

You can create as many assessments as you like, and you can create more than one assessment to display for a given score.


It is important to note that if you use assessments, you must ensure that you have not chosen to autoload the URL at the end of the survey in the general survey setup, because the assessments only show on the final "completed" page after submitting a survey.

Templates

A number of the 'public' elements of PHPSurveyor can be adjusted by a series of templates.

This section provides a very brief explanation of these templates, however more detailed information - especially regarding the editing/creation of new templates is available in the [PHPSurveyor Templates Guide](#).

The PHPSurveyor Template Editor

The PHPSurveyor Template Editor allows you to edit the contents of your templates online. Start the Template Editor by clicking on the "Template Editor" icon in the PHPSurveyor Administration toolbar ()

The main screen is similar to the PHPSurveyor Survey Administration screen. It allows you to select the template to edit/view. Once this has been selected you can then select from one of the different public survey pages. You are then presented with a list of the template files that make up that particular page.

The Template Menu



The "traffic" light icon indicates whether or not the template is editable or not. A red light indicates that the template is read only, green indicates you may make modifications.

The "edit" icon allows you to change the name of the template, and the "copy" icon allows you to make a new template by copying the current one.

The "Screen" dropdown list on the right allows you to choose which particular survey page you are currently looking at.

The File Control Section



In the "file control" window on the left, you can click on one of the template files that is used to compile the page. The html code for that file will then appear in the "Now editing" window in the center. If the template is editable (determined by directory permissions) you can then make any changes and save them.

The "Other Files" window shows a list of all other files in the template directory. You can use this side to upload image files or other files needed to create your template. Note that to refer to any of these files in your template, instead of using - say "<img src='/phpsurveyor/templates/yourtemplate/mypicture.jpg'" you can use, "<img src='{TEMPLATEURL}mypicture.jpg'"

A "sample" of the template page you are editing will be visible at the bottom of the screen.

There is no capacity to delete a template from the template editor. This must be done using ftp by deleting the directory.

The "default" template cannot be edited using the Template Editor, although you can edit it manually.

Replacements / Field Strings

The following strings will be replaced by PHPSurveyor when parsing the template file and presenting it to survey users. These field strings will almost every template except for the 'Completed Page'.

Field	Replaced With
{SURVEYNAME}	The survey's name
{SURVEYDESCRIPTION}	The survey's description
{WELCOME}	The survey's welcome message
{PERCENTCOMPLETE}	A graph (table) charting the percent completed of the survey
{GROUPNAME}	The name of the current group
{GROUPDESCRIPTION}	The description of the current group
{QUESTION}	The question (text)
{QUESTION_CODE}	The question (code)
{ANSWER}	The answer(s) to the current question
{THEREAREXQUESTIONS}	Replaced with the statement "There are X questions in this survey" - where X is the total number of questions in the survey.

{NUMBEROFQUESTIONS}	The total number of questions in the survey
{TOKEN}	The current "token id"
{SID}	The current "survey id"
{QUESTIONHELP}	The help text for the current question, in a javascript pop-up box
{QUESTIONHELPPPLAINTEXT}	The help text for the current question
{NAVIGATOR}	The "Next >>" and "<< Prev" buttons
{SUBMITBUTTON}	The "submit" button
{COMPLETED}	"Survey is completed and saved" - from language file
{URL}	The URL/URL Title for this survey
{PRIVACY}	Inserts the contents of the privacy.pstpl template
{PRIVACYMESSAGE}	The privacy message from the language file
{CLEARALL}	The URL to "Exit and clear responses"
{TEMPLATEURL}	The URL to the current template location (useful for referencing image files in your template)
{SUBMITCOMPLETE}	The statement (from the lang files) that tells the user they have completed the survey, and to press the "Submit" button
{SUBMITREVIEW}	The statement (from the lang files) that tells the user they can review/change the answers they have made by clicking "<< prev"
{TOKEN:FIRSTNAME}	If survey is NOT ANONYMOUS - gets replaced with the users first name from the tokens table
{TOKEN:LASTNAME}	If survey is NOT ANONYMOUS - gets replaced with the users last name from the tokens table
{TOKEN:EMAIL}	If survey is NOT ANONYMOUS - gets replaced with the users email from the tokens table
{TOKEN:ATTRIBUTE_1}	If survey is NOT ANONYMOUS - gets replaced with the users attribute_1 from the tokens table
{TOKEN:ATTRIBUTE_2}	If survey is NOT ANONYMOUS - gets replaced with the users attribute_2 from the tokens table
{ANSWERSCLEARED}	The "Answers Cleared" statement from the lang files
{RESTART}	URL to restart the survey
{CLOSEWINDOW}	URL to close current window
{REGISTERERROR}	Shows any error messages in the register page (ie: "You must include an email address")
{REGISTERMESSAGE1}	The statement "You must be registered to complete this survey" from the lang files
{REGISTERMESSAGE2}	Details about registering from the lang files
{REGISTERFORM}	The actual form for registering, will change depending on whether the attribute_1 and attribute_2 fields are set.

Localisation

The public survey screens can be localised so that built-in messages and text will appear in your preferred language. For example "yes" and "no" in the Deutsch/German version would appear as "ja" and "nein".


Activating a Survey

Once you are happy with the structure of your survey you can activate it. Activating a survey does a number of things.

1. It creates a separate table to hold all survey responses, and gives each possible answer to the survey a field in that table.
2. It allows people to enter data into that table, and gives you access to other features for the survey, including browse and token facilities.
3. It gives you access to the "tokens" feature. Once a survey is activated, the "tokens" button will be available (see section on Tokens).
4. If your survey is set to "not anonymous", a tokens table will be created automatically.

Before you activate a survey you should note the following points:

- When the survey is initialised you can change the text for questions, answers, the survey etc, but not the type of question or the type of answer.
- You cannot add new questions or delete questions. Nor can you add answers to any of the array or multiple choice questions, however you can add answers to the basic list type questions.

Activate a survey by clicking on the  button in the survey button bar. If this icon is not shown, then your survey is not yet capable of being activated. Once clicking on this icon, the Surveyor will run a quick consistency check to make sure that your survey will work properly.


Safely Running a Survey

Once you have activated a survey and are receiving responses it is worthwhile considering the following:

- Export the survey structure immediately and save the sql file somewhere.
- Regularly visit the "browse" screen and use the "backup survey x results" to create a sql backup of the responses table.
- Regularly export the responses and keep a copy of the file.
- Try not to make changes to the survey. There are some parts of the survey that can still be changed after it has been activated, and while these shouldn't cause problems, its better safe than sorry. Fully test your survey before you activate it and then try to leave it exactly as it is.

Browsing Survey Responses

Once a survey has been activated, and survey responses have been submitted, you will want to be able to view those responses, maybe edit some of them (or possibly delete some), export them, get some information about the responses received so far, and so on. All of this is done through the "browse" function.

When your survey is active, a 'Browse' button () will appear in the Survey Information portion of the main admin screen.



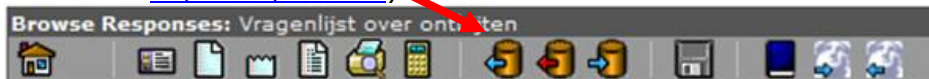
Clicking this button will open the "Browse" screen. An example is shown below.



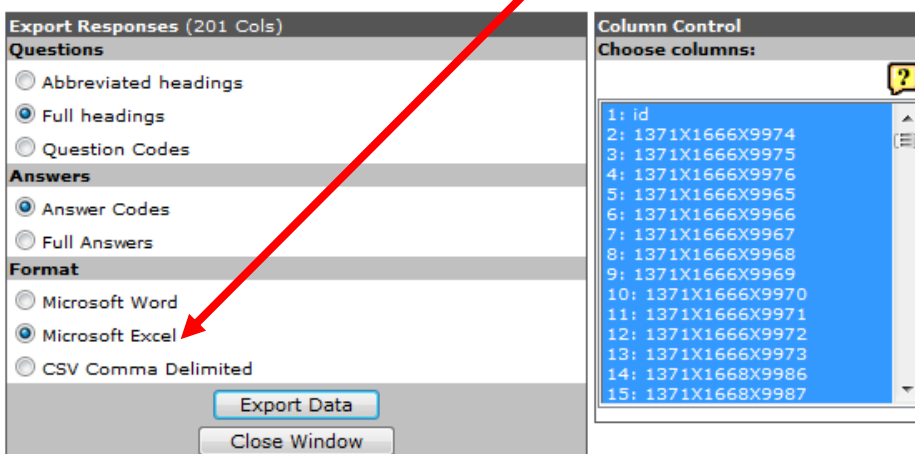
2319 responses in this database

The main screen (Survey Summary) gives you just a quantity of responses to this survey so far. The other options are described below:

- **Admin:** Return to the main admin screen for surveys
- **Survey Summary:** Just show the total responses so far (initial screen)
- **Browse All:** Display all the results to the survey (note: the browse shows full descriptive question names, but only abbreviated answers. See section below ([editing and deleting responses](#))).
- **Browse last 50:** Display the last 50 responses to the survey, ordered from most recent to least recent.
When you are browsing responses, the first entry for each row (the "id" number will be a hyperlinked number. Clicking on this hyperlink allows you to view that specific response on an individual basis. From here you can edit or delete a response. See section below ([editing and deleting responses](#))).
- **Data Entry:** Go to the data entry screen to add a new survey (this option is also available from the admin screen)
- **Printable Version:** A fairly basic, but hopefully useable version of the survey that can be printed off for people to fill in by hand.
- **Statistics:** A simple method for filtering and getting summaries of responses. (See section on [Statistics](#))
- **Export Data:** Export all the responses to this survey to a Word, Excel or CSV file. (See section on [Exporting Results](#))



Choose for export to application, the for Excel



- **Backup Survey X Results:** Dump the table structure and contents to a standard MySQL *.sql file

Data View Control:

Records Displayed: Starting From:

Bottom of Form

Editing and Deleting Responses

When viewing your responses, you will be able to view a specific response by clicking on the id number. An example of 'browse' responses is shown below.

id	What is your Employment Type?	What are your Hours of Work?	What is your Spread of Hours?	What is your Gender?	What is your Classification?	What is your Top Priority for outcomes of the next Enterprise Agreement? This might be something new, an improvement to existing conditions, or ongoing inclusion of a condition you value.	What is your Top Priority for outcomes of the next Enterprise Agreement? This might be something new, an improvement to existing conditions, or ongoing inclusion of a condition you value. (comment)
1	A	A	A	F	A	I	Please pay us more money.
2	B	A	A	F	B	J	Possibility of further tertiary study and working that in with my current job.

Clicking on the hyperlinked id number will present the 'view record' screen:

Viewing Answer ID 1

id1

What is your Employment Type? Full Time [A]

What are your Hours of Work? 76 Hours Per Fortnight [A]

What is your Spread of Hours? 9 to 5 [A]

What is your Gender? Female [F]

What is your Classification? Administrative Officer [A]

Do you manage staff in your current job? No [N]

What is your Region/Division? Health Sector [H]

What is your Top Priority for outcomes of the next Enterprise Agreement? Increased Salaries [I]

This might be something new, an improvement to existing conditions, or ongoing inclusion of a condition you value.

What is your Top Priority for outcomes of the next Enterprise Agreement? Please pay us more money.

This might be something new,
an improvement to existing
conditions, or ongoing inclusion
of a condition you value.
[Comment]

From this point you can choose to "Edit" or "Delete" this response.

Deleting the responses is, of course, fairly self-explanatory - and as anyone who regularly runs surveys would know, is not recommended, unless you've got a pretty good reason (ie: a doubled up entry, or some sufficiently serious reason as to why it should be deleted). Don't click on this button thinking it will give you a second chance. If you click "Delete", the entry **will be deleted** with no second guessing or second checks.

Editing the response is also fairly self-explanatory. It will take you to a 'data-entry' screen with the responses provided, and allow you to make and save any modifications. Again, in a survey you generally don't want to make changes to the responses made by the participants - but hey - it's your survey. Do what you want!

Tokens

On many occasions you will want to invite a group of people to participate in your survey, keep track of who has completed the survey, and ensure that each person can only participate once. Tokens can be setup once a survey has been activated. The tokens feature allows you to do the following:

- Import a list of names and email addresses for participants (from a CSV file) or add/remove individuals
- Generate a unique token number for each participant
- Send an email invitation to each person in your list, either en-masse or individually
- Send a reminder email to each person in your list who has not yet responded, either en-masse or individually
- Track who from your list has responded
- Restrict access against people who have not got a token, and those with a token who have already voted.
- Edit/change any details in your list

Once you enable tokens for a survey, then the only people who can access the survey are those who have been issued a token number. Access to the public script will rely on the participant being able to provide their unique token id.

Tokens can be matched to surveys that have been set up as "not-anonymous". This is determined when creating a survey. If a survey is not anonymous (or 'tracked') then the token list can be used to find the particular response that an individual has made to the survey. If the survey is anonymous, then no link is available between the tokens table and the responses.

The following is a brief rundown of the menu options in the tokens screen:

- **Admin:** Returns to the main survey admin screen;
- **Summary:** Displays just the brief summary of tokens in the table (no. of tokens, how many have been sent an invite, how many have responded). Also provides access to the [Database Admin functions](#) (see below). This is the default screen.

- **Browse:** Displays the complete list of participants in the tokens table. From the browse screen you can edit or delete individual entries in the token table as well as perform a number of other useful functions (see browse section below)
- **Add:** Allows you to add an entry to the tokens table;
- **Import:** Allows you to import information from a csv file
- **Tokenify:** A new word for the english language, specifically invented for this script (come on OED, get to work). Creates unique tokens for all individual entries in the tokens table that do not yet have one.
- **Invite:** Sends bulk email invitations to all participants in the tokens table who have not already been sent an invitation.
- **Remind:** Sends bulk email reminders to all participants in the tokens table who have not yet responded, but have been sent their first invitation.

The following field names are allowed in invitation/reminder email **templates** and must be entered in the surevy properties. When sending out the emails these field names will be already replaced in the preview of your invitation/reminder email.

{ADMINEMAIL}	Email of the Survey admin
{ADMINNAME}	Name of Survey Admin
{SURVEYNAME}	Title of your survey
{SURVEYDESCRIPTION}	Description of your survey

The following field names are allowed in invitation/reminder emails (subject and/or body) and will be replaced while sending out the mails:

{EMAIL}	Email of the recipient
{FIRSTNAME}	First Name
{LASTNAME}	Last Name
{SURVEYURL}	Your public URL pointing ot the survey start
{TOKEN}	Token to access the survey
{ATTRIBUTE_1}	Attribute 1
{ATTRIBUTE_2}	Attribute 2

Database Admin

While the **summary** screen shows a brief summary of tokens in the table, it also provides access to the "Database Admin" features which include:

- **Clear invites:** Sets all records that an invitation has been sent out to 'N'. Obviously shouldn't normally be used.
- **Clear tokens:** Clears all tokens. Similarly shouldn't normally be used.
- **Drop tokens:** Allows you to remove the tokens feature from your script. Deletes the entire table and all records, and allows the survey to be accessed by anybody who knows the URL.

Using the browse screen

The browse screen will show you a list of all entries in the tokens table, as well as giving you some 'action' buttons that can perform specific tasks for that individual entry.

The top row of the table gives options for displaying a number of records, and a starting point. The second row of the table includes the field name, and a green arrow that - if clicked - will refresh the screen showing the tokens ordered by that field. The last row of the table lets you move backwards or forwards through your list (based on the settings at the top).

Showing records starting at

I D	Firs t	Last	Email	Token	Invite ?	Done ?	attribute_1	attribute_2	Action
1	Jason	Cleeland	jason@cleeland.org	0829007266	Y	Y	Administrator	Australia	
2	Bob	Jones	jason@cleeland.org	1371896219	Y		Interpreter	Botswana	
3	Eric	Estrada	erice@cleeland.org	R193857398	Y	Y	Actor	USA	

The "Action" column gives a list of specific tasks that can be performed on that individual entry.

- **E:** Edit this entry
- **D:** Delete this entry
- **S:** Do the survey using this entries unique token
- **R:** Send a reminder to this individual entry (only available if invite has already been sent)
- **I:** Send an invitation to this individual entry (only available if invite has not already been sent)
- **V:** If the survey is a 'tracked' (ie: not anonymous) survey, the "V" button will appear, allowing you to view the response from this individual entry.

Allowing Public Registration

You may want to open your survey to the public, but utilise the sort of respondent control available when using tokens. This is possible from version 0.98rc9 onwards. If you initialise your tokens table, and have chosen to Allow Public Registration in the main survey setup, people who visit your survey's URL without a token, will be given the opportunity to register. If they provide an email address that is not already in the current survey's tokens table, an entry in the tokens table will be created, and they will be emailed an invitation containing their unique Token. All tokens provided to "registering" visitors will begin with the letter "R".

Exporting Results

You can export responses by selecting "Export Data" from the Browse screen.

When you choose this option, you will be presented with a new window, showing the various export options.

- Abbreviated Headings: Just exports the question id, group id and survey id
- Full Question Headings: Exports the Question title itself as the heading
- Brief Answers: Just exports the relevant codes for each answer
- Extended Answers: Exports the answer text matching codes

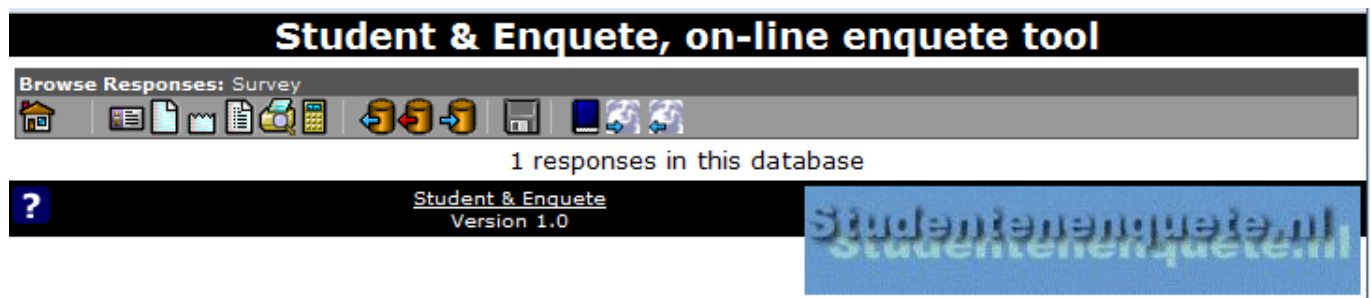
- Microsoft Word Format: Exports the data as a 'document' (at this point, unformatted and with just tabs between data)
- Microsoft Excel Format: Exports the data as a 'spreadsheet'
- CSV Comma Delimited Format: Exports the data as a comma delimited file

The export screen also allows you to select which fields to export, and if the survey is not anonymous, allows you to merge the token information for each response with the export.

VVExport and VVImport

Once you've begun collecting responses, there may be occasions where you need to be able to directly edit and modify large quantities of data from your responses table, where a spreadsheet tool may be more useful.

VVExport and VVImport (the "VV" stands for vertical verification) allow you to export your responses table into a "tab separated values" (tsv) file. So long as the general structure of the file remains intact, you can then edit values within it, and the import the file again into your responses table using the "VVImport" feature.



Exporting a VV survey file

When you choose to export responses using VVExport you will be given the option of either exporting the results and leaving the survey active, or exporting the results and de-activating the survey.

If you choose to deactivate the survey, the responses table will be renamed and become unavailable without direct MySQL access (it will be renamed in the same way as de-activating a survey does).

If your survey uses tokens you should note that deactivating the survey also causes the tokens table to be renamed and made unavailable. It is probably best not to deactivate a survey that uses tokens unless you know how to rename tables in MySQL and can move the tokens table back manually.

The ability to deactivate the survey is important because a 'vv survey file' allows you to import the responses to a survey when the question/answer combinations have changed. Effectively this allows you to add or remove questions in an active survey.

Clicking on "Export Responses" will then produce a tab delimited file that can be opened by Excel or similar style spreadsheet program. The first two rows of the spreadsheet are the column labels. The first row is a "human readable" column heading that details the name of the question/answer field. The second row is the internal PHP column name for that response.

You should not modify the first two rows of this spreadsheet if you want to be able to "import" the data back into PHPSurveyor at a later point.



Importing a VV survey file

As long as the first two lines are intact, you can then import the data in your vv survey file back into an active PHPSurveyor survey. If you deactivated the survey when you exported the data you will need to activate the survey in the normal way when doing this.

Then, from the browse screen, choose the "Import a VV Survey file" icon.

The "Import a VV Survey File" screen needs you to choose the "vvexport" you are importing. If you choose to "Exclude Record IDs" the records will be imported and brand new Record ID's will be generated for them. If you untick this box, then the original record id's will be imported.

There are a range of options you can choose that tell PHPSurveyor how to deal with double or multiple entries.

Statistics

The statistics feature is available from the menu of the browse screen, which - of course - is only available once a survey has been activated.

What is the statistics feature?

Lets say you've got a survey running, or it's finished, and you want to start analysing the results. PHPSurveyor can dump all the results into an Excel spreadsheet (or CSV file, or Microsoft Word file) for you, and you can do whatever takes your fancy with the data then. Alternatively you can use the statistics feature to have a look at your data, and start getting some useful information from it.

The statistics feature allows you to 'filter' your data and retrieve numbers, and summaries of different fields from it. The statistics script doesn't attempt to do highly complex filtering - but you'd be surprised at the sort of information that can be easily obtained.

Filtering data

When you first start using the statistics feature, it will present you with a list of the questions that can be used to filter your data. An example is shown below. Each question box gives the question code, a 'radio' button that can be selected in order to show a summary of this table, and a loudspeaker icon that when clicked (or if the mouse hovers over it) will give you the full text of the question. Then it gives a list of the pre-defined answers for that question. The list allows multiple selections. So, for example in the case shown below, you could choose to filter all results where "ongoing" has been chosen, or by using the control button, you could add "Fixed Term" or "Casual". Go through all the boxes filtering in your preferred way.

Q01 

Agency / Temp Casual Fixed Term Ongoing

Image 1: Question box

Selecting "View Stats" will then present you with a results table showing you the total number of responses that match your criteria, and a percentage of the total responses for the survey. An example of 'Results' table is shown below.

Results
Your query returns 146 record(s)!
There are 187 records in your survey. This query represents 78% of your total results
<code>SELECT count(*) FROM survey_4 WHERE 4X6X22 IN ('A') AND 4X6X23 IN ('A')</code>

Viewing Field Summaries

While this can be pretty useful information on its own, often in a survey you will want to get a summary of all results for a question, when particular criteria are met. To do this, select the radio button at the top of the question you want to see a summary for, set the criteria in the other boxes, and select "View Stats". From release 0.97 there is also the option of viewing a summary of all fields.

You will then be given both the 'Results' table, indicating the number of responses matching your criteria, and also a "Field Summary" table (as shown below) which will summarise all possible answers in the question you chose, their totals and their percentage. It is important to note that these results are a subset of your total responses. So, for example, if your criteria display 146 records out of a total 180, the summary will show the breakdown of just those 146 records for that table.

Field Summary for Q04:		
What is your Gender?		
Answer	Count	Percentage
No Answer	1	00%
Female (F)	49	33%
Male (M)	96	65%

Things to be cautious of

- If you set criteria on the same question that you ask for a summary, then that question will only present answers matching your criteria. So it is good practise not to set any criteria on the same question you are getting a summary of.
- To select multiple entries for a question hold down the CTRL button when clicking. To 'unselect' the last criteria (if you want to clear all criteria from a question) click on the last highlighted answer with the CTRL button.

Browsing / Exporting filtered results

If you want to export the responses that match your criteria, click on the "export" button at the bottom of the 'Results' table. This will bring up the usual export screen, however when you export the results you will only receive the responses that match your criteria. Similarly, click on browse to view the matching responses in the browse screen.