



EUSurvey Open Source Software Quickstart Guide (v2)

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This Quick Start Guide will take you through the steps to set-up a new online survey using EUSurvey.
Please conduct the following steps to get your new online form up and running:

Step 1: Connecting to the application

Go to the EUSurvey homepage using a web-browser of your choice and click the login button to access the application.

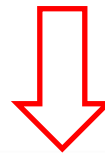
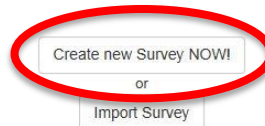
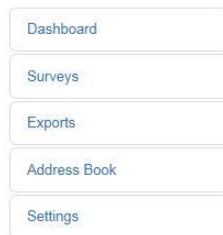


Step 2: Creating a new survey

From the Welcome screen, click the "Create new Survey NOW!" button that will open the creation dialogue.



 Welcome, admin



New Survey

*Alias	<input type="text" value="USSS2016"/> <small>Please choose a meaningful alias (e.g. ACCABCSurvey2020) as it will be part of the URL of the survey. The alias should have less than 255 characters.</small>
*Title	<div><div>B <i>I</i> <u>U</u> S ↶ ↷ ☰ ☷ 🔗 <> Font Sizes ▾ A ▾ Font Family ▾</div><div>User Satisfaction Survey - Support 2016</div></div>
*Security	<input checked="" type="radio"/> Open <input type="radio"/> Secured
*Expected answers	<input checked="" type="radio"/> 200+ answers <input type="radio"/> 2000+ answers <input type="radio"/> 5000+ answers
*Pivot Language	<input type="text" value="English"/> ▾
*Contact	<div><input type="text" value="E-mail"/> ▾ <input type="text" value="eusurvey@eusurvey.be"/> x</div> <small>Please enter your contact email or the URL of a contact form of yours</small>

The survey creation process asks you to enter basic information.

Be assured that any information you type in here can be changed later on at the "Properties" page of your survey.

Available settings in this dialogue are:

- **Alias:** An abbreviation of your survey, used for identification. Will become a part of the URL that participants will use to access your survey
- **Title:** Your survey's full title
- **Security:** Open or secured
 - Choose "Open" for a survey that can be accessed by all participants knowing your survey's URL.
 - Choose "Secured" for protected surveys that cannot be accessed without a global password or individual access links (to be configured in the application).
- **Expected answers:** The expected number of answers is only for information for the EUSurvey team and does not have any consequences on the real number of replies.
- **Pivot Language:** The primary language of the survey you are about to create
- **Contact:** A personal email address, functional mailbox or web page that can be contacted by your participants on emerging questions regarding your survey. It will be integrated automatically in the published survey.

Confirm your choice by clicking "Create". It creates your survey and opens the editor screen right away, ready for you to add form elements to your newly created survey.

Please note that by default all surveys save "User and connection related data". If you want to create a fully anonymous survey, please configure this setting at the survey's "Properties" page.

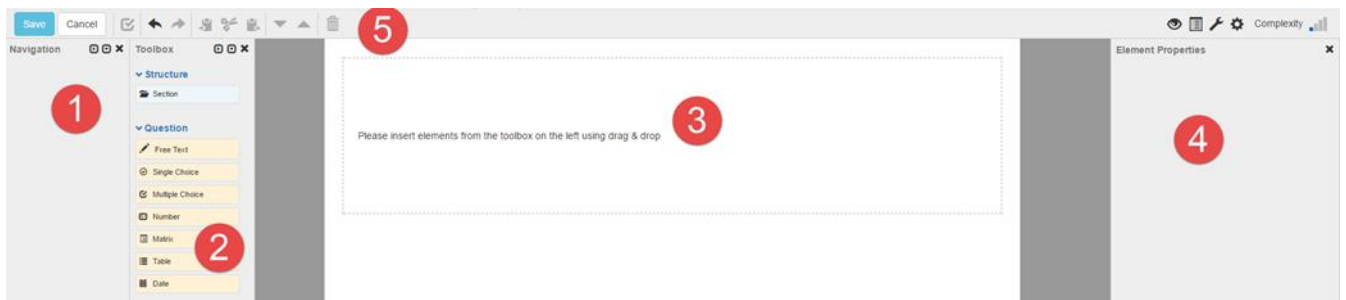
Step 3: Adding form elements to your survey

In the Editor, you can design your questionnaire by adding questions and other elements to your survey. You can drag form elements from your survey's toolbox on the left of the screen and drop them into your form that is visualized in the middle of the screen. Each element is displayed as it will be shown later on your published survey.

Use section elements to structure your content, media elements to add media content at every position of your form and special elements for advanced survey interaction.

Don't forget to save your work from time to time using the "Save" button on the top left of the screen.

The editor consists of five main areas:



Navigation pane (1): Provides a structured view of the questionnaire


Toolbox pane (2): Contains the different element types that can be added to the questionnaire

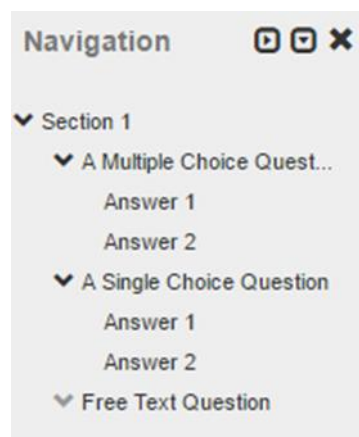
Form area (3): A preview of the questionnaire where the elements can be added and selected for editing

Element properties pane (4): Contains all available options for the selected element(s)

Toolbar (5): Contains buttons for basic tasks

The Navigation pane

It provides a detailed overview of the structure of your questionnaire. All elements are represented by their respective text label in the questionnaire. You can expand or collapse an element to view or hide its children elements by clicking the  icon next to the element. When you select an element in the Navigation pane, the Form area jumps to the selected item, which is then highlighted in blue.



To expand or collapse all elements at the same time, use the buttons in the upper-right corner of the pane.

The Toolbox pane

The toolbox pane contains all the element types that you can add to your questionnaire. They can be added either by using the drag-and-drop feature or by double-clicking them.



The Form area

All elements are added here. It gives you a preview of how the elements will look in the questionnaire. The input fields are deactivated.

The elements contain default texts, with the name of the element displayed as the question text.

You can click an element to edit it. Selected elements appear in blue, with the respective options visible in the Element properties pane.



The Element properties pane

It displays the settings for selected elements. You can edit the elements here, e.g. by changing the question text, adding help messages and changing all relevant settings to adapt the question to your needs.

Element Properties		✕
Type	Free Text	
Text	Free Text Question	
Mandatory	<input type="checkbox"/>	
Rows	1 ▼	
Help Message		
Accepted number of characters	min <input type="text"/>	max <input type="text"/>
Visibility	always visible	
Advanced		

By default, the pane displays all the basic options. To display more options, click "Advanced".

To edit a text in the rich text editor:

1. Click the text or the pen icon
2. Modify the text
3. Click "Apply" to see the changes in the Form area

The Toolbar

The toolbar includes all available general actions to perform when creating your questionnaire.

Step 4: Editing form elements

Selecting an element

Use your pointer to select any element in the Form area.

For matrix and text questions, you can also choose the individual questions/answers/rows/columns of the element by clicking the respective label text as indicated below.

Matrix

	Answer 1	Answer 2	Answer 3
Question 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Question 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Question 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

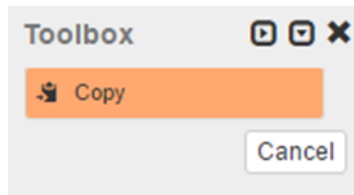
Matrix

	Answer 1	Answer 2	Answer 3
Question 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Question 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Question 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The Element properties pane will then adapt automatically and only show the available options for the current selection. This way, you can e.g. select individual questions of a matrix or table element and make them mandatory.

Copying an element

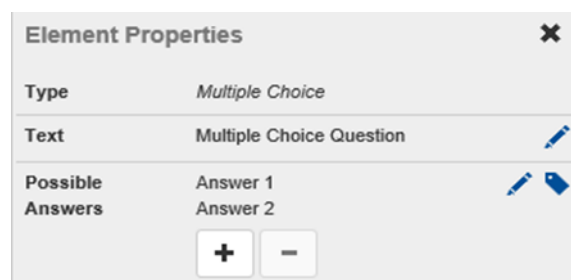
Any elements that have been copied or cut are depicted by a placeholder at the top of the Toolbox pane. You can add them to the questionnaire again using the drag-and-drop feature. You can also use the button next to the element to cancel this operation.



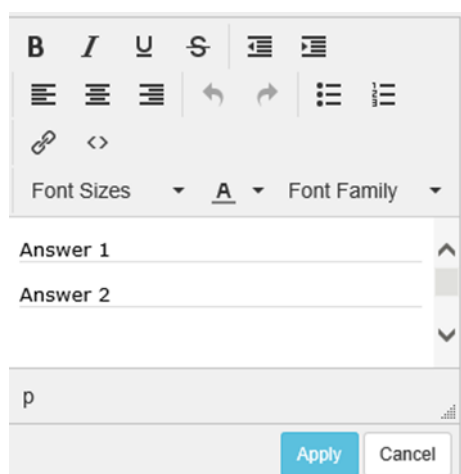
1. Select the element(s)
2. Click “Copy”
3. Move the placeholder from the Toolbox to the Form area as described above or select the element in the Form area and click “Paste after”.

Adding or removing possible answers in question elements

You can add or remove possible answers by clicking the plus/minus button in the Element properties pane.



Edit the text of the existing answer options by clicking the pen icon next to “Possible Answers” . You can then edit them in the rich text editor.



Make a question mandatory

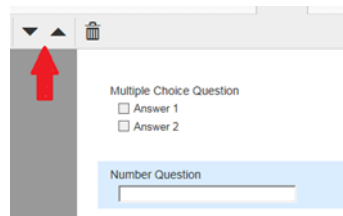
Select the check box in the Element properties pane after selecting the respective element.

Mandatory questions will be marked using a red asterisk on the left side of the question text.

Moving elements within the questionnaire

You can change the position of an element in your questionnaire by using one of the following options:

- **Drag-and-drop:** Select the element in the Form area and drag it to where you want in the questionnaire
- **Cut-and-paste:** Cut the element(s) you want to move and use the drag-and-drop feature to move the placeholder to where you want to put it
- **Move buttons:** Select the element you want to move and click the respective arrow icon to move it up or down



The visibility feature (dependencies)

By using this feature, you can display and hide elements depending on answers given by the participants to either single/multiple choice or matrix questions.

By default, all elements are set to “always visible” which means that everybody will see the question when answering the survey.

To create a dependency, follow these steps:

1. Add a single/multiple choice or matrix question to your questionnaire
2. Add further elements to your questionnaire
3. Select an element that follows a single/multiple choice or matrix element and that should only appear when a specific answer has been chosen
4. Click on the pen icon (1) to edit the visibility settings. All available questions of the type Single Choice, Multiple Choice and Matrix that are placed above the selected element(s) are displayed, including the question text and the possible answers
5. Select the answer that, when chosen, will display the selected element (2)
6. Click "Apply" to confirm the visibility setting (3)

Visibility: always visible

Please select the element(s) that trigger this element

Multiple Choice Question

☒ Answer triggering the question ([ID1])

☐ Answer not triggering the question ([ID2])

Apply Cancel

Advanced

If multiple elements are selected, you can edit the visibility settings for all of them at once.

Note: This modification will only affect the questionnaire on the Test page and in published mode. All elements will still be visible in the editor.

When activated, arrows are displayed next to the connected elements to visualise the visibility settings in the Form area. Answers that trigger any element are displayed with an arrow pointing down. Elements that are triggered by any answer are marked with an arrow pointing up.

New Matrix

	New Text	New Text	New Text
New Text	<input type="radio"/> ↓	<input type="radio"/>	<input type="radio"/>
New Text	<input type="radio"/> ↓	<input type="radio"/>	<input type="radio"/>
New Text	<input type="radio"/> ↓	<input type="radio"/>	<input type="radio"/>

↑ Date

between 17/05/2017 and 25/05/2017

When moving the pointer over the arrows or IDs in the Element properties pane, the connected elements are highlighted in the Form area and Navigation pane.

Elements with visibility settings that have been edited will be hidden in the questionnaire until at least one of the configured answers has been selected by the participant when filling in the questionnaire.

Step 5: Publishing your Survey

From the "Overview" page, click "Publish" to activate your survey.

The screenshot shows the 'Overview' page of the EUSurvey interface. At the top, there is a navigation bar with tabs: Overview (selected), Editor, Test, Results, Participants, Privileges, Translations, Properties, and Activity. Below the navigation bar, the title 'User Satisfaction Survey - Support 2016' is displayed. The main content area shows survey details: Survey Location (USSS2016), Owner (admin), Status (Unpublished), Starts on (Unset), Ends on (Unset), Answers (0), and Results (Unpublished). A 'Publish' button is circled in red, indicating the next step. Other buttons include 'Pending changes', 'Edit Settings', and 'Edit Result Publication'.

The survey is available by clicking the link next to "Survey Location".

The screenshot shows the 'Overview' page after the survey has been published. The 'Status' is now 'Published'. The 'Publish' button is no longer visible, but an 'Unpublish' button is present. The 'Survey Location' link (USSS2016) remains the same. The 'Pending changes' button is still visible.

More information regarding the creation of surveys and frequently asked questions can be found on the documentation page, available from the EUSurvey **help** page.

A tutorial survey showing all elements in use is available at <https://ec.europa.eu/eusurvey/runner/TutorialEUSurvey>

For learning how to use the tool, an **EUSurvey eLearning training course** is available on the EUSurvey homepage. If you follow this training, you will be able to design and publish a survey and to analyse the results.