

# Data Collection Toolkit





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## Introduction

This toolkit was created to help Jordanian Civil Society Organizations (CSOs) collect data securely, efficiently, and in Arabic. It introduces two open-source tools, KoboToolbox and LimeSurvey, both protect sensitive data, allow offline collection, and empower teams to work even in low-connectivity environments.

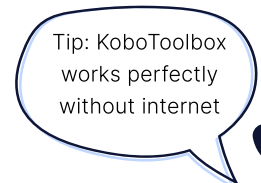
## Choosing The Right Data Collection Tool

### ✦ Collecting data isn't just about filling forms

It's about making your work easier, safer, and smarter. This section helps you understand what to look for before you choose your tool. Because the right choice protects your community's information, saves you time, and makes your data truly useful.

### ✦ Go Offline, Stay Productive

Internet can be tricky during fieldwork, and that's okay! Pick a tool that works **offline** (**Offline Mode: ability to collect data without an internet connection and upload later**) and syncs automatically. You'll never lose data, even in remote areas.



### ✦ Keep Your Data Safe

People trust you with their stories and information. Make sure your tool **encrypts your data** (**Encryption: converts data into unreadable code to protect it**) so only your team can access it. It's not just good practice, it's part of keeping your community safe.

### ✦ Speak Their Language

Your team works better when tools speak their language. Choose a tool with full Arabic support from the form questions to the interface itself.

✦ Less confusion.      ✦ Fewer mistakes.      ✦ Smoother work.



# Choosing The Right Data Collection Tool

## ❖ Control Who Sees What

Not everyone needs to see everything. Look for tools with **role-based access** (RBAC: permissions assigned based on user role), so you decide who is allowed to view, edit, or download data. Simple control prevents big problems.

## ❖ Know Where Your Data Lives

Data sovereignty (Data Sovereignty: data is subject to the laws of the country where it's stored) means you choose where your data is stored: on your own **server** or a trusted one.

**Server:** system or service that stores, manages, and processes collected data

## ❖ Open Source

Open-source tools (Open Source: software freely available to use, modify, and share; developed by communities) give you control and freedom. Built by communities for communities, they are easy to understand, adapt, and trust. Even non-technical users can see why it matters: you're not tied to proprietary software, support is community-driven, and anyone can grasp how the tool works.

## ❖ Choose Simplicity

You don't need to be a tech expert. Pick tools that are easy to use, easy to train, and ready to go. If your team feels comfortable, your project runs smoother.





## Data Privacy And Security

Working with sensitive information requires responsibility. Always protect accounts with strong passwords, share access only with authorized users, and back up your data regularly. Encryption and secure servers help ensure the safety of participants' information.

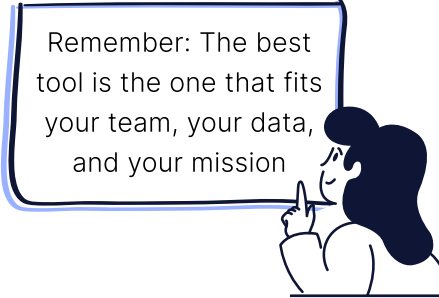


These best practices apply to both KoboToolbox and LimeSurvey to ensure secure and ethical data collection.



# Which Open Source Tool Better Fits Your Needs?

Now that you know what matters, you're ready to compare different data collection tools. The table below will guide you through some aspects of KoboToolbox and LimeSurvey, both has its strengths.



| Aspect                       | KoboToolbox  | LimeSurvey  | Guidance for CSOs  |
|------------------------------|--|---|--|
| Ease of Use                  | Drag-and-drop interface, minimal setup, no coding required                   | Web-based interface, requires some initial setup, but user-friendly once configured | Low technical capacity<br>↓<br>KoboToolbox                     |
| Arabic Support               | Full RTL (Right-to-Left) support   | Full RTL support and customizable text direction                                    | Both handle Arabic well  |
| Offline Functionality        | Built-in Offline Mode for mobile and tablet data collection                  | Requires LimeSurvey Offline App or integration                                      | For offline field surveys<br>↓<br>KoboToolbox easier           |
| Hosting & Data Sovereignty   | Cloud hosting (by Kobo) or self-hosted version                               | Fully self-hosted or enterprise cloud (paid)  | Need data control or local hosting<br>↓<br>LimeSurvey          |
| Compliance & Data Protection | Hosted servers based in EU or self-hosted; follows common privacy principles | EU-hosted or self-hosted; supports full GDPR compliance                             | Projects with strict donor or privacy rules<br>↓<br>LimeSurvey |



## Which Open Source Tool Better Fits Your Needs?

| Aspect                               | KoboToolbox   | LimeSurvey   | Guidance for CSOs   |
|--------------------------------------|---|--|---|
| Complex Forms & Logic                | Supports skip logic and basic conditions  | Advanced logic, branching, validation, quotas                                | Complex questionnaires<br>↓<br>LimeSurvey                                     |
| Security & Privacy                   | Encryption, RBAC, audit logs  | Granular user permissions, encryption, open-source transparency              | Sensitive or regulated data<br>↓<br>LimeSurvey                                |
| Data Analysis & Export / Integration | Built-in dashboard, export to XLS/CSV/Power BI                                      | Built-in reports, statistics, exports (SPSS, R, CSV, Excel), API integration | Quick insights<br>↓<br>KoboToolbox      Advanced analytics<br>↓<br>LimeSurvey |
| Cost & Support                       | Free for non-profits; large humanitarian user community                             | Free self-hosted; paid enterprise support available                          | Limited budget<br>↓<br>KoboToolbox      Dedicated IT team<br>↓<br>LimeSurvey  |
| Users & Adoption                     | 30 000+ organizations worldwide; widely used by humanitarian and development actors | Thousands of organizations globally; strong in academic and research fields  | Both are trusted open-source tools with active communities                    |
| Best Fit / Use Cases                 | Humanitarian projects, field data collection, rapid assessments                     | Research, public opinion surveys, M&E studies, academic use                  | Choose based on project type and data complexity                              |



# Which Open Source Tool Better Fits Your Needs?

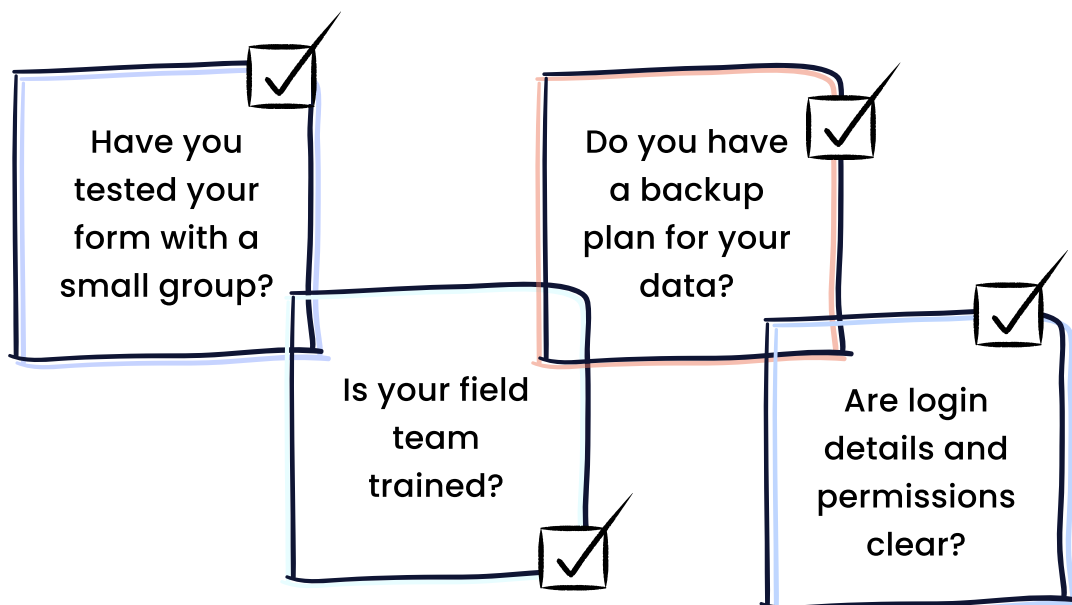
## Conclusion and Recommendations

KoboToolbox: Best for simplicity, Arabic support, and quick deployment. Primarily cloud-based, requiring no server management, making it ideal for teams with limited technical capacity.

LimeSurvey: Best for advanced features, user management, and flexibility in designing complex surveys. Supports both self-hosting and cloud options, offering full control over data and customization.

Recommendation: Pilot both tools on a small project, assess your organization's technical capacity and project needs, and choose the tool that aligns best with your requirements.

## Quick Checklist Before You Start







Tool #1:

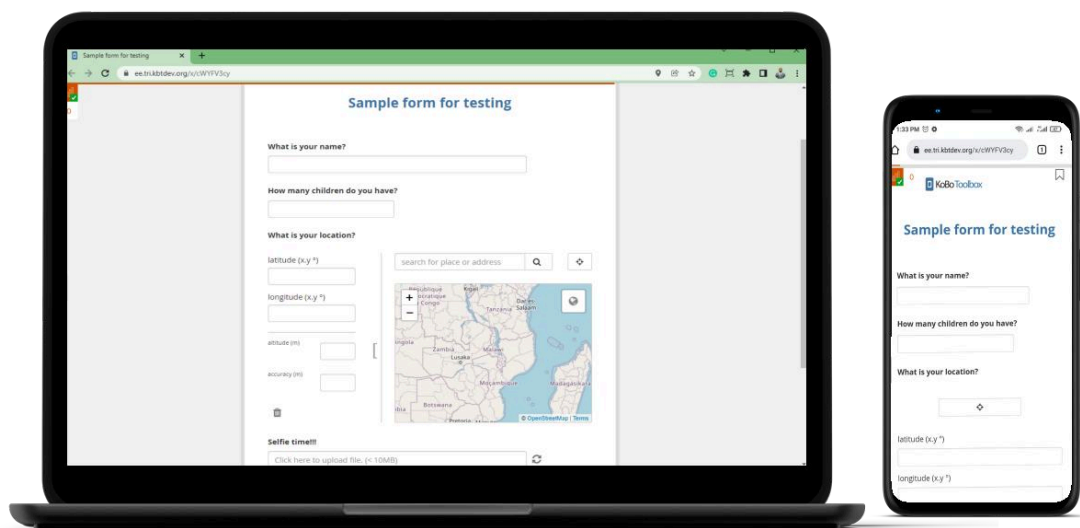
# KoboToolbox



# KoboToolbox

KoboToolbox is a simple reliable tool to collect data in the field, even if your team has little technical experience. It allows you to track progress, monitor projects, and gather information safely. It works offline, supports Arabic fully, and keeps your data secure.

If your goal is assessing community needs, registering beneficiaries, or tracking attendance at a training program; KoboToolbox helps you do all this efficiently, without worrying about internet access.



## Use Cases In Jordan



Collecting beneficiary data for training programs (example: Crown Prince Foundation).



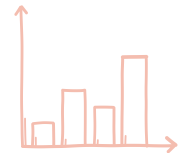
Refugee registration and needs assessments.



Health monitoring in refugee camps.



Multi-language surveys for Arabic-speaking teams.



Monitoring and evaluation of CSO programs.



## Practical Tips

- ✦ Pilot-test surveys before field deployment.
- ✦ Train enumerators on offline collection and syncing.
- ✦ Keep backups of survey forms and collected data.
- ✦ Regularly check the dashboard to track progress.



## How KoboToolbox Works

We will help you through the process step by step:

- ① Create an account and login
- ② Field Data Collection with KoboCollect
- ③ Create your first survey
- ④ Manage translations
- ⑤ Assign roles to your survey
- ⑥ Use the data collection App
- ⑦ Manage and export responses
- ⑧ Manage surveys
- ⑨ Advanced data analysis




# How KoboToolbox Works

## ① Creating an Account and Logging in

Use your organizational email to create a KoboToolbox account and log in through the website: <https://www.kobotoolbox.org/> You can access both the web and mobile versions to manage your account. Screenshots below show the registration and login screens.


### Sign in or create an account

**Global KoboToolbox Server**

Most people use our global KoboToolbox server. Get started with a free account today.

Create an account

Sign in →

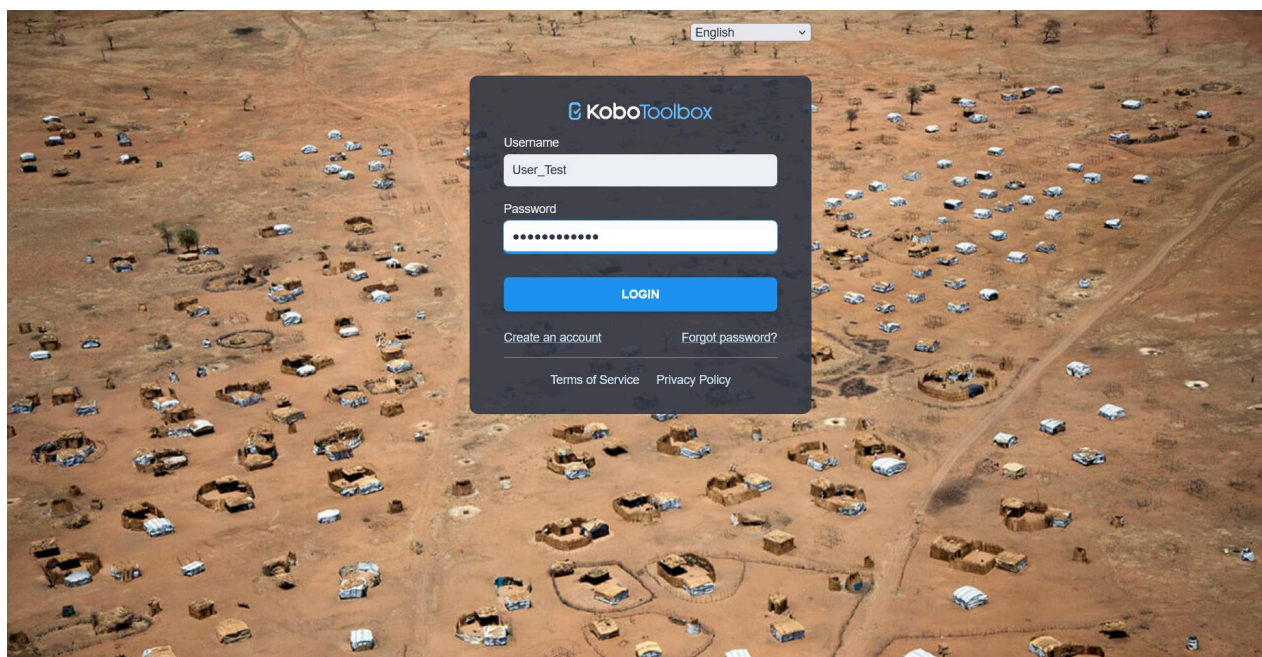
**European Union KoboToolbox Server**

The European Union-based server is hosted in Ireland. This server is used by organizations that require or prefer data hosting in the European Union. Get started with a free account today.

Create an account

Sign in →

Both servers offer the same features, you may choose based on your location and where you would like your data stored.

The login screen is a dark grey overlay on a background image of a village in a dry, hilly landscape. The login form includes a language dropdown set to 'English', a KoboToolbox logo, a 'Username' field with 'User\_Test' entered, a 'Password' field with masked characters, a blue 'LOGIN' button, and links for 'Create an account', 'Forgot password?', 'Terms of Service', and 'Privacy Policy'.



# How KoboToolbox Works

## ② Field Data Collection with KoboCollect

Use the App for Field Data Collection, you can gather information directly from participants or other sources, usually on-site or in the community.

KoboCollect is the mobile app used by field staff (enumerators) to collect survey data efficiently. You can fill out surveys offline, and all responses will automatically sync once an internet connection is available.

✧ In short: use the website to ask the questions and the app to get the answers. ✧

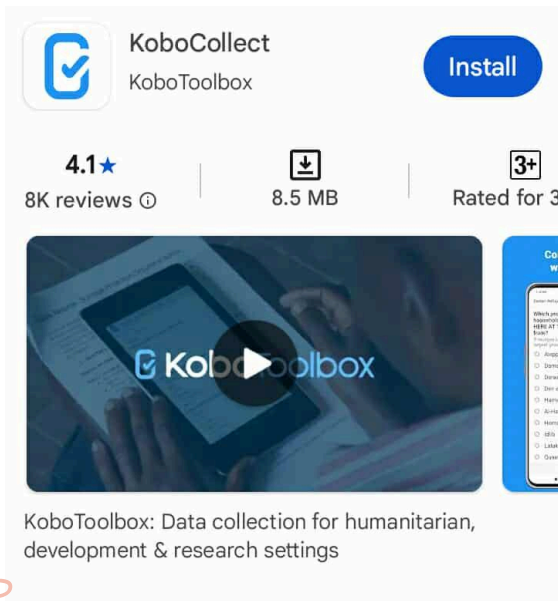
Download the app here:

Google Play: [https://play.google.com/store/apps/details?id=org.koboc.collect.android&pcampaignid=web\\_share](https://play.google.com/store/apps/details?id=org.koboc.collect.android&pcampaignid=web_share)

APK: <https://kobocollect.en.softonic.com/android?ex=RAMP-3582.0&rex=true>



# How KoboToolbox Works



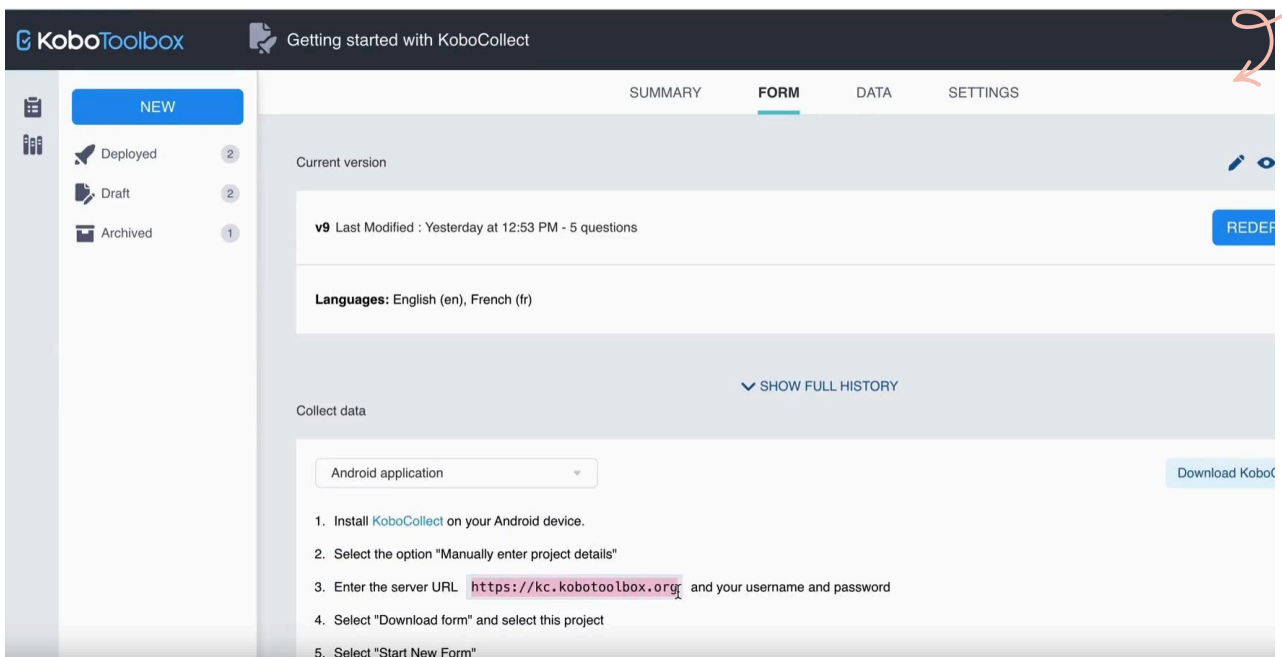
### Add project

URL

Username

Password

To connect KoboCollect to your project, enter the project URL, your username, and password. Once logged in, your assigned projects will appear in the app, ready to start collecting data. URL: <https://kc.kobotoolbox.org>





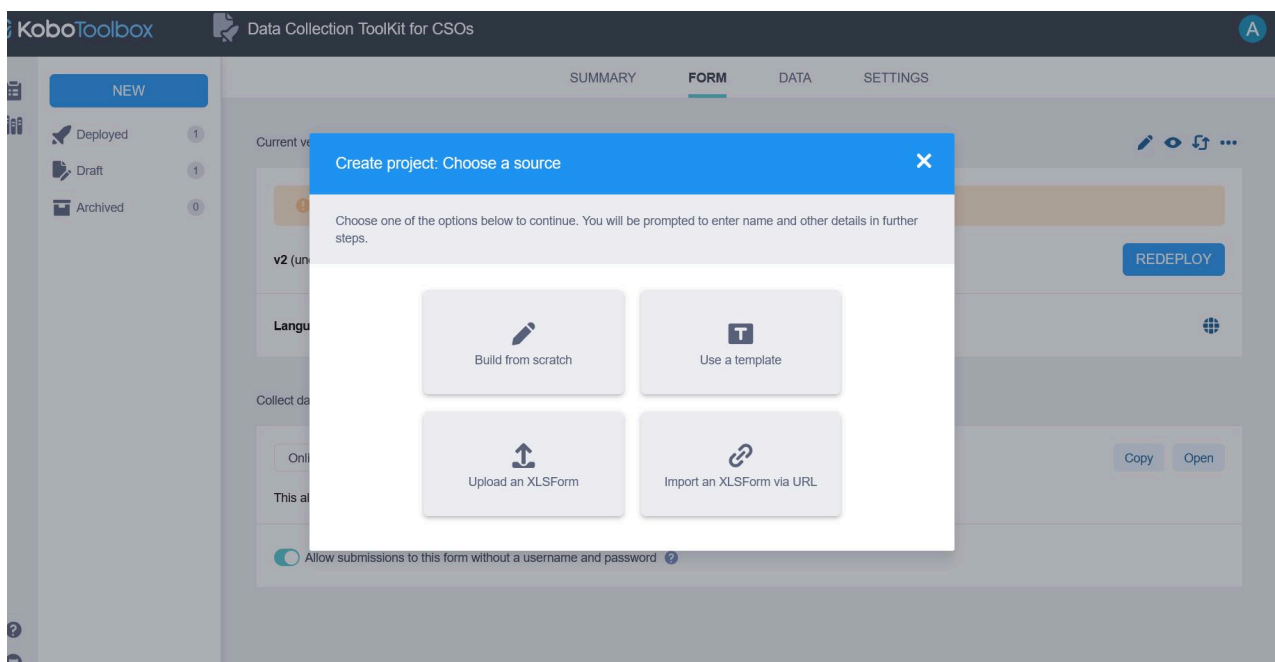
## How KoboToolbox Works



After the initial manual setup, you can generate a QR code to configure other devices

### ③ Create Your first Survey

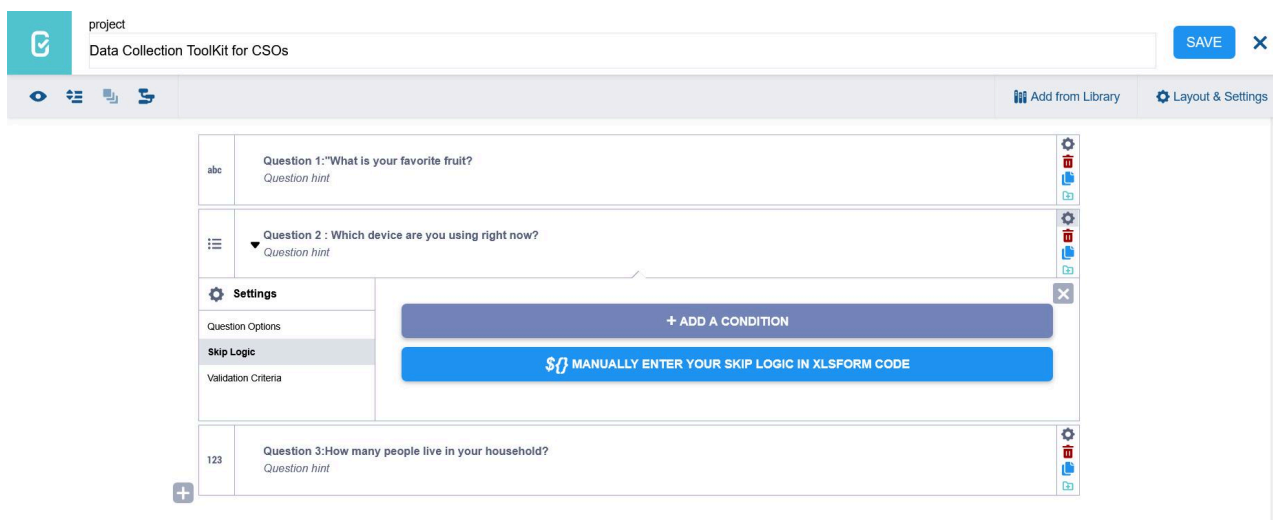
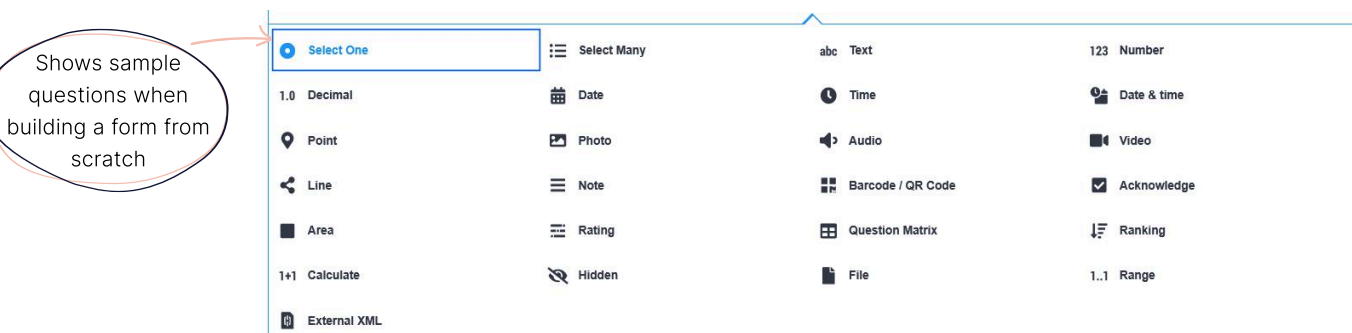
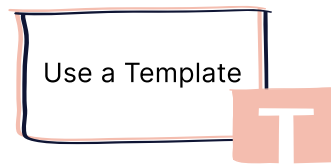
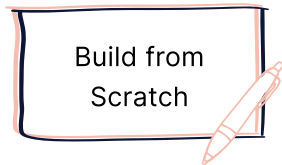
Drag and drop the questions you need using the form builder. Preview the survey to make sure it works as expected.





# How KoboToolbox Works

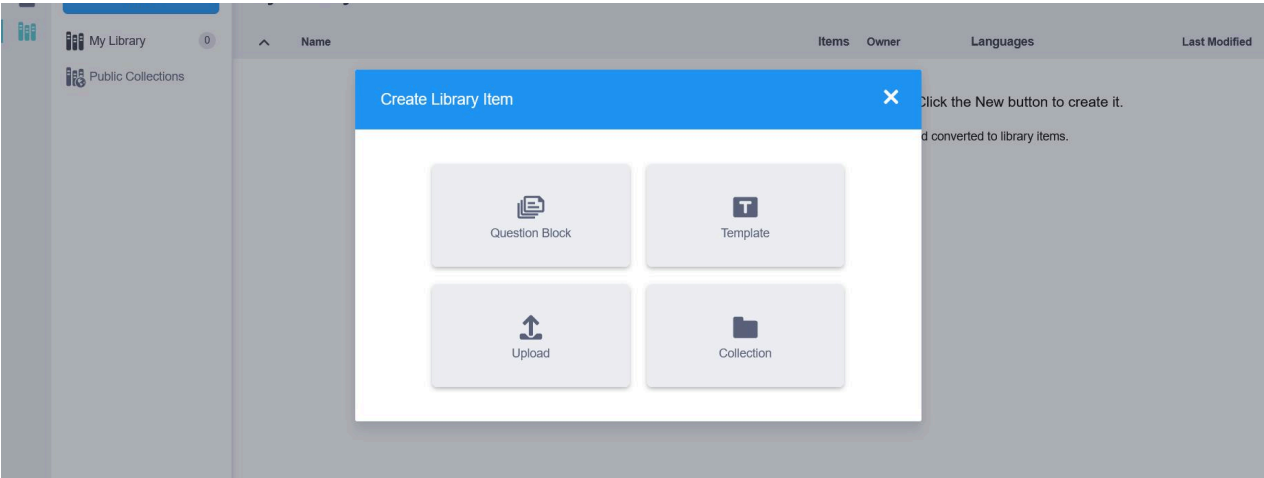
Four options to start your survey:



Use the 'Add Condition' feature to control the flow of your survey. This lets you show or hide questions based on respondents' previous answers, making your forms show relevant questions and thus becoming more dynamic.



# How KoboToolbox Works



Four options to start your survey:



**Question Block:**

Save a single question or a group of questions



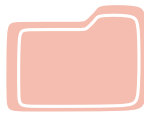
**Template:**

Save an entire form as a template



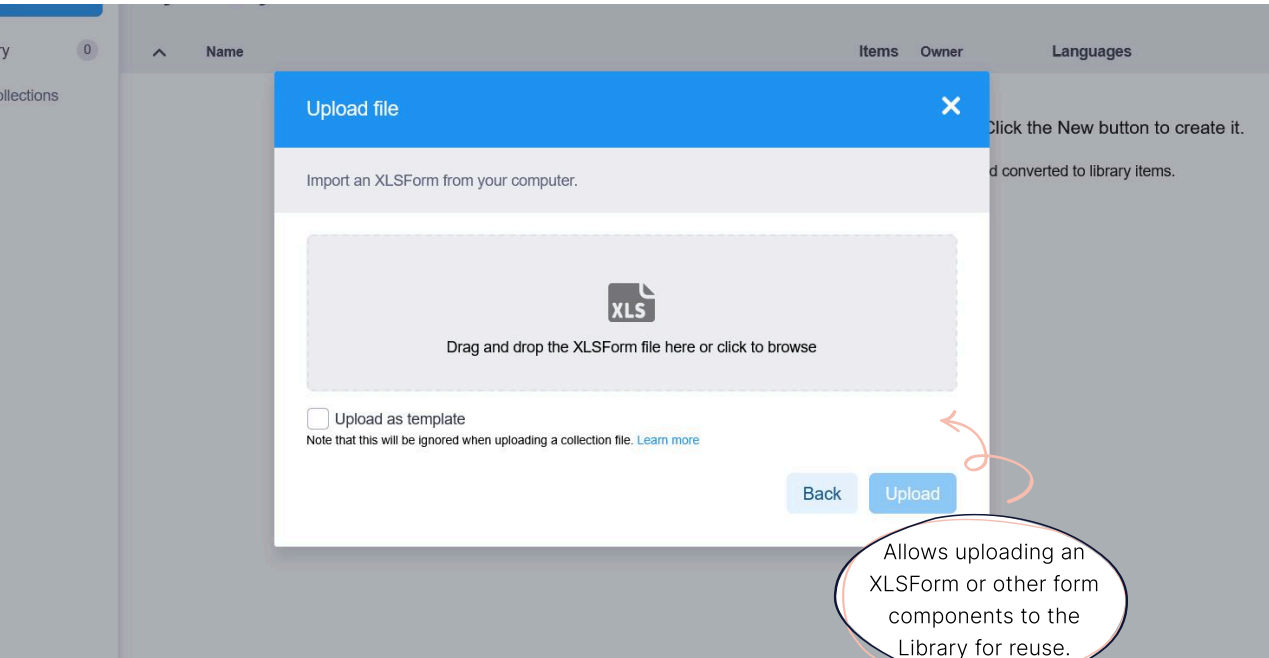
**Upload:**

Use a file that contains questions



**Collection:**

Manage saved items

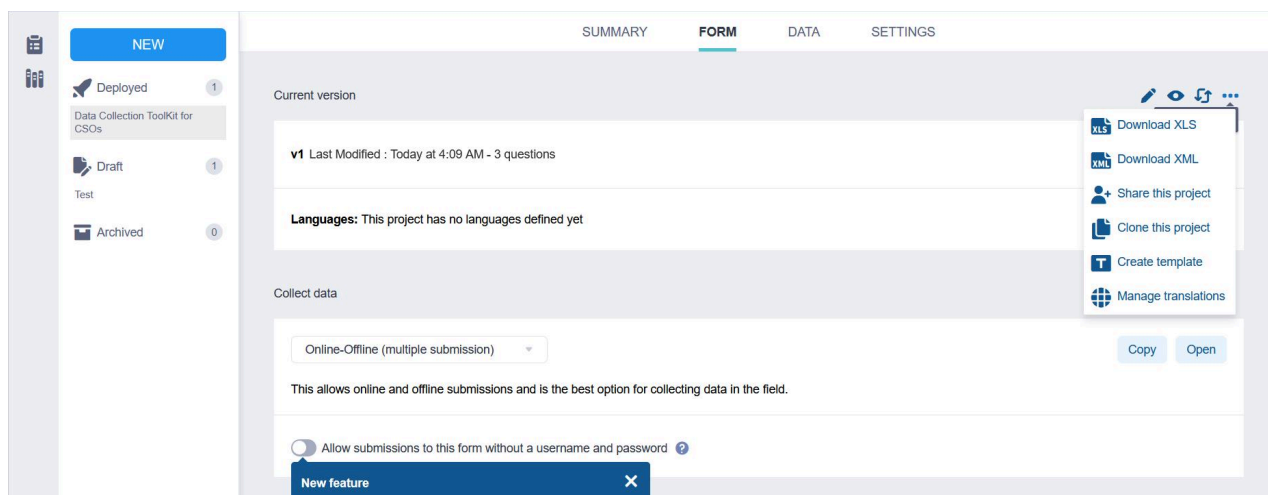




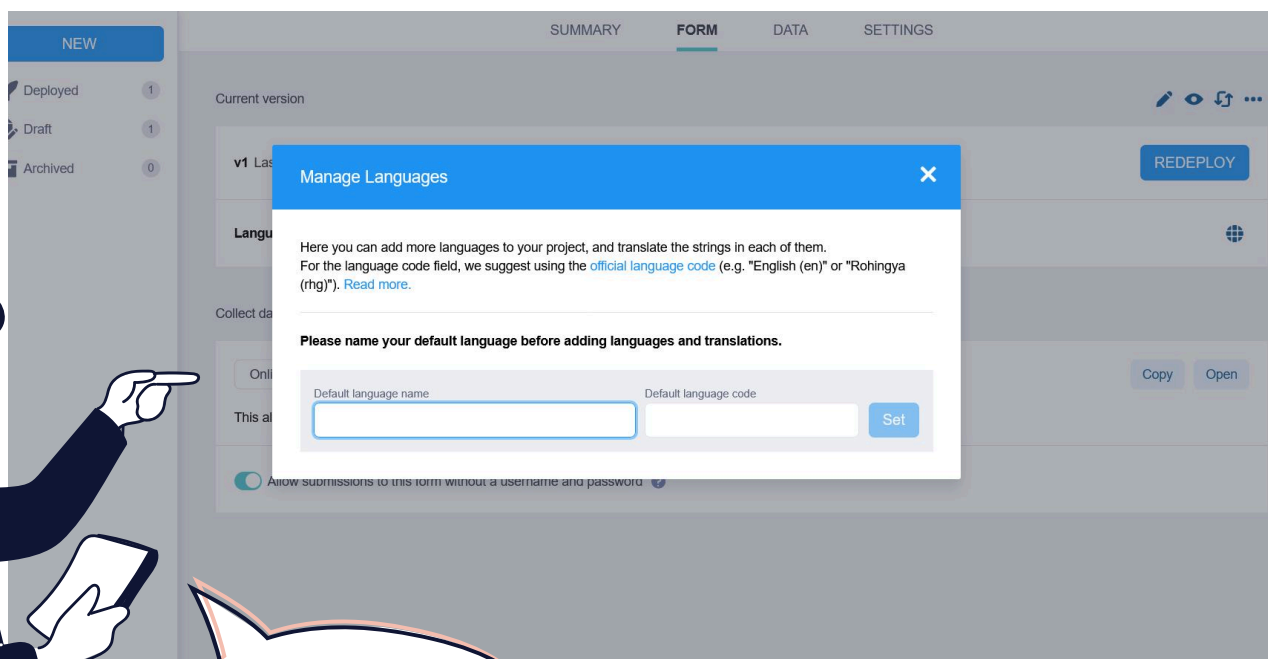
# How KoboToolbox Works

## ④ Manage Translation

This option allows you to manage the different language versions of your form. You can add, edit, or delete translations so respondents can choose their preferred language when filling out the survey.



The screenshot shows the KoboToolbox interface with the 'FORM' tab selected. On the left sidebar, the 'Manage translations' option is highlighted. The main content area shows the 'Current version' section with a 'v1' label and a 'Last Modified' timestamp. Below this, a message states 'Languages: This project has no languages defined yet'. The 'Collect data' section shows a dropdown menu set to 'Online-Offline (multiple submission)' and a toggle for 'Allow submissions to this form without a username and password'.



The screenshot shows the 'Manage Languages' dialog box. It contains instructions: 'Here you can add more languages to your project, and translate the strings in each of them. For the language code field, we suggest using the official language code (e.g. "English (en)" or "Rohingya (rhg)"). Read more.' Below this, a prompt says 'Please name your default language before adding languages and translations.' There are two input fields: 'Default language name' and 'Default language code', followed by a 'Set' button. The background shows the 'FORM' tab with a 'REDEPLOY' button.



This window shows the language selection list before any translations have been added



# How KoboToolbox Works

Current version

v1 Last

Language

Collect data

Online-Offline (multiplatform)

This allows online and offline submissions and is the best option for collecting data in the field.

Manage Languages

Here you can add more languages to your project, and translate the strings in each of them. For the language code field, we suggest using the [official language code](#) (e.g. "English (en)" or "Rohingya (rhg)"). [Read more.](#)

Please name your default language before adding languages and translations.

Default language name

Default language code

Arabic

ar

Set

Allow submissions to this form without a username and password

Here, the Arabic (ar) translation has been added and is visible in the language selection list

If you want to make these changes public, you must deploy this form.

v2 (undeployed) Last

Languages: Arabic (ar) default

English (en)

Add language

Collect data

Online-Offline (multiplatform)

This allows online and offline submissions and is the best option for collecting data in the field.

The default language is the main form language shown first to field staff. Other added languages appear as optional translations

Translations Table

| Original string                                     | Arabic (ar) translation                         |
|---|---|
| Question 1: What is your favorite fruit?            | السؤال 1: ما هي فاكهتك المفضلة؟                 |
| Question 2 : Which device are you using right now?  | السؤال 2: ما الجهاز الذي تستخدمه حالياً؟        |
| Question 3: How many people live in your household? | السؤال 3: كم عدد الأشخاص الذين يعيشون في منزلك؟ |

Mobile

لايتوب

حاسوب مكتبي

Page 1 of 1

Next

Back

Save Changes

The "Update Translations" window allows you to edit and review your Arabic translations to ensure all questions and options are accurately localized

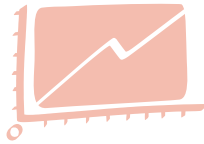


# How KoboToolbox Works

## ⑤ Assign Roles to Your Team



**Admin:**  
Manages everything



**Data Manager:**  
Oversees data quality



**Enumerator:**  
Collects data in the field

NEW

Deployed 5

Draft 6

Archived 1

General

Media

Sharing

Connect Projects

REST Services

Household profiling

! Anyone can see this blank form and add submissions to it because you have not set [your account](#) to require authentication.

Who has access

A alexander is owner

username

☒ View form

☐ Edit form

☐ View submissions

☐ View submissions only from specific users

☒ Add submissions

☐ Edit submissions

☐ Edit submissions only from specific users

☐ Validate submissions

☐ Validate submissions only from specific users

☐ Delete submissions

☐ Delete submissions only from specific users

☐ Manage project

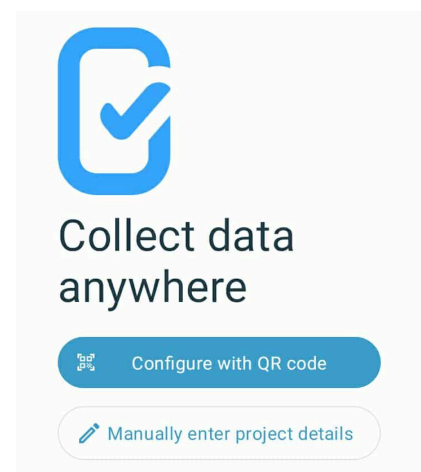
GRANT PERMISSIONS

You can choose who can see or edit your forms and data, so only the right team members have access

## ⑥ Use The Data Collection App

After adding the project URL, you can use the app to fill forms and manage surveys from your device.

Each screen shows the main features to help you collect and view data easily.





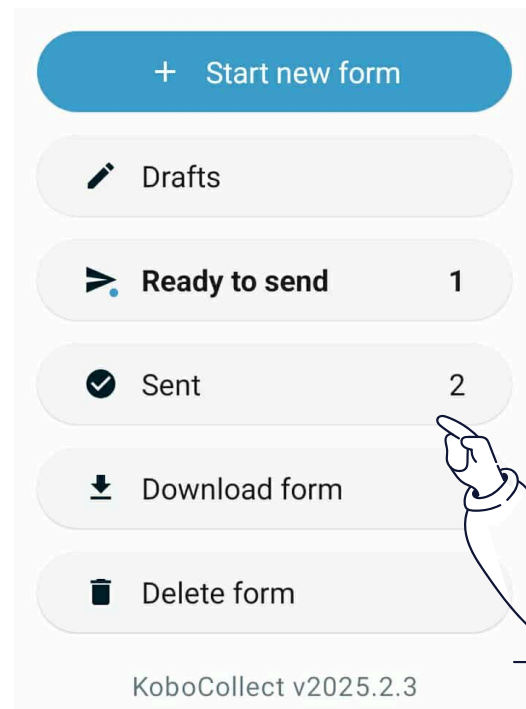
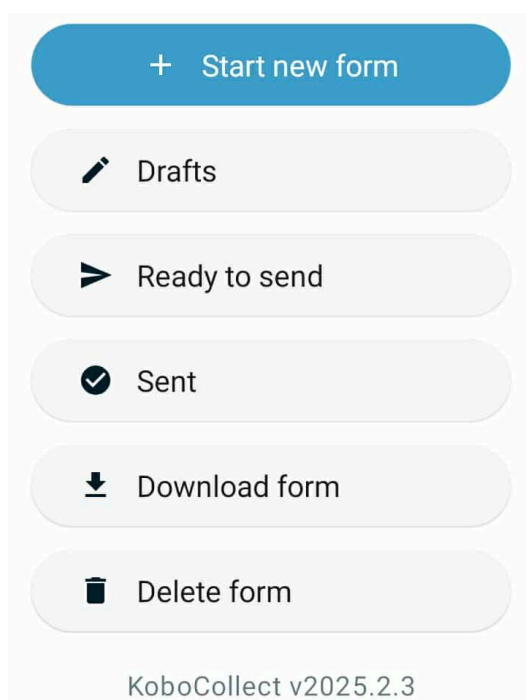
# How KoboToolbox Works

## 1 The Main Screen

The main screen is where you see all forms and manage your data collection. From here you can start, continue, or send forms.

### Features:

- ✦ Start New Form - begin a new data collection session and start filling a new form.
- ✦ Draft - view forms saved as drafts.
- ✦ Ready to Send - forms that are completed and ready to upload.
- ✦ Send - upload completed forms to the server.
- ✦ Download Form - get forms deployed from the website.
- ✦ Delete Form - remove a form from the device.



When the device is offline, completed forms stay in Ready to Send until an internet connection is available. Once the device is online, the forms can be uploaded and will then appear in the Sent section



# How KoboToolbox Works

## 2 Download Form Screen

This window lets you download forms from your projects and prepare them for data collection.

### Features:

- ✦ Shows forms deployed from the website.
- ✦ Select / Select All - choose forms to download.
- ✦ Refresh: update the list with new forms.
- ✦ Download: download selected forms to the device.

**Download form**

|   |                                  |                                     |
|---|----------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/>                         | Data Collection ToolKit for CSOs | <input checked="" type="checkbox"/> |
| Version: 1 (2025-10-20 13:30:01) ID: aJsp8DmkSeFtbZDksYpcpn |                                  |                                     |

Clear All   Refresh   Get Selected

## 3 Start New Form

This screen is used for filling survey responses. You go through the questions and enter the data directly on your device.

**Data Collection T...**

Question 1: "What is your favorite fruit?"

Question 2 : Which device are you using right now?

Question 3: How many people live in your household?

### Features:

- ✦ Shows the questions in the form.
- ✦ Navigate through the questions.
- ✦ Fill answers directly.






# How KoboToolbox Works

## 4 Finalized / Ready to Send Sections

You are at the end of Data Collection ToolKit for CSOs.

 Edits can't be made after finalizing.


If you need to make edits to your form, "Save as draft" until you're ready to send.  
[Learn more](#)


Once forms are completed, this screen lets you review and send them to the server


 Save as draft


 Finalize


 Start new form

 Drafts

 Ready to send 1

 Sent

 Download form

 Delete form

 Data Collection ToolKit for CSOs 

Finalized on Tue, Oct 21, 2025 at 04:51

Clear All

Send Selected

### Upload Results

Data Collection ToolKit for CSOs  
.- Successful submission

OK



# How KoboToolbox Works

## Features:

- ✦ Completed forms appear as Ready to Send.
- ✦ Select the forms you want to upload.
- ✦ Send Selected – upload results to the server.
- ✦ Shows Upload Results confirmation.

## Delete Screen

| Delete form |  |                          |
|-------------|--|--------------------------|
| Saved Forms | Blank Forms  |                          |
|             | Data Collection ToolKit for CSOs<br>Sent on Tue, Oct 21, 2025 at 04:52 | <input type="checkbox"/> |
|             | Data Collection ToolKit for CSOs<br>Sent on Tue, Oct 21, 2025 at 04:53 | <input type="checkbox"/> |

Tip: Be careful when deleting, as this removes the form from your device but does not affect the forms stored on the server



## Features:

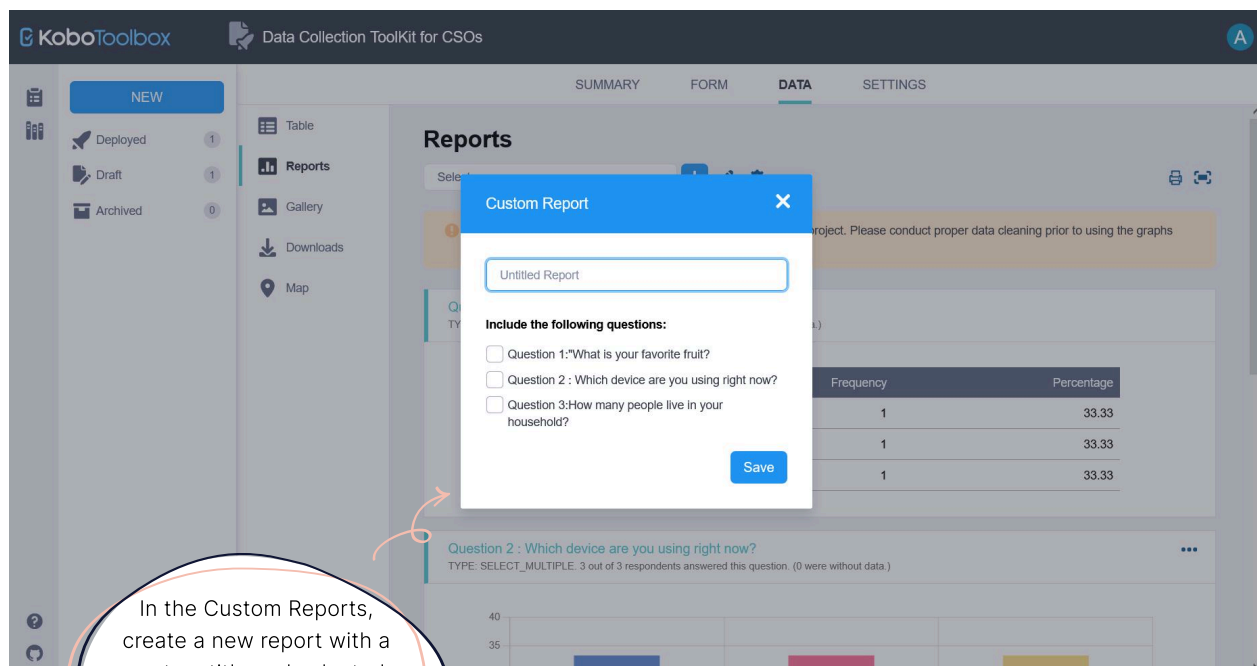
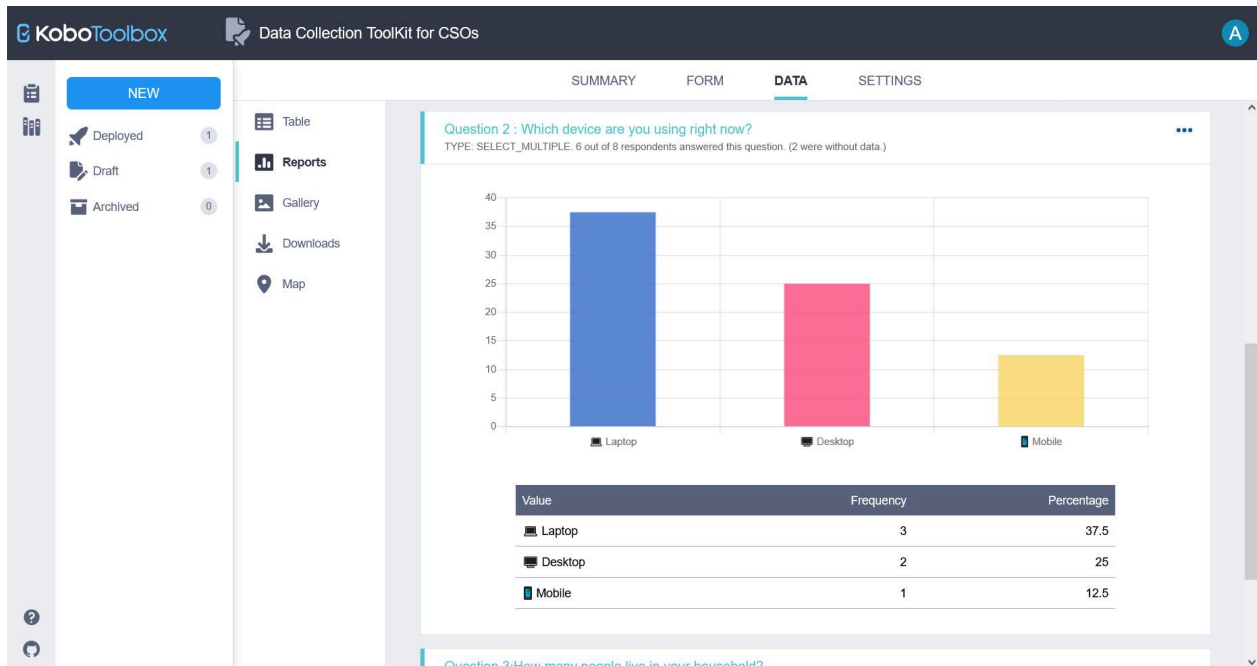
- ✦ It lets you delete forms from your device.
- ✦ Saved Forms – shows all forms you have saved or drafted.
- ✦ Blank Forms – shows all forms available but not yet filled.
- ✦ Delete Selected – choose one or more forms and remove them from your device.



# How KoboToolbox Works

## ⑦ Manage And Export Responses

Check responses on the dashboard. KoboToolbox provides summary tables, charts, and quick overviews of your data.



In the Custom Reports, create a new report with a custom title and selected questions, or browse through reports you've already created



# How KoboToolbox Works

When you want to create reports and export data in CSV or Excel formats. This allows your team to perform simple analysis directly.

Open your project and navigate to DATA > Downloads.

The screenshot shows the KoboToolbox interface. On the left, a sidebar contains a 'NEW' button and a list of project statuses: 'Deployed' (1), 'Draft' (1), and 'Archived' (0). Below these are icons for 'Table', 'Reports', 'Gallery', 'Downloads', and 'Map'. The main content area is titled 'Downloads' and has tabs for 'SUMMARY', 'FORM', 'DATA' (selected), and 'SETTINGS'. Under the 'Downloads' tab, there are two sections: 'Downloads' and 'Exports'. The 'Downloads' section has a 'Select export type' dropdown set to 'XLS' and a 'Value and header format' dropdown set to 'XML values and headers'. Below these are 'Advanced options' and 'Apply saved export settings' (set to 'Latest unsaved settings'). A blue 'Export' button is on the right. The 'Exports' section contains a table with three rows of export data. Callout 1 points to the 'Downloads' section. Callout 2 points to the 'Export' button. Callout 3 points to the 'Download' button in the table.

1 Choose your export settings

2 Click EXPORT. This will generate an export which will be shown in a table underneath the export settings

3 Click DOWNLOAD to download the exported file

| Type | Created          | Language               | Include Groups | Multiple Versions |          |  |
|------|------------------|------------------------|----------------|-------------------|----------|--|
| XLS  | Today at 3:04 PM | XML values and headers | No             | Yes               | Download |  |
| XLS  | Today at 3:04 PM | XML values and headers | No             | Yes               | Download |  |
| XLS  | Today at 5:03 AM | XML values and headers | No             | Yes               | Download |  |


Download lets you save a copy of your collected data directly to your device for backup or offline use

## ⑧ Manage Survey

This section gives a quick overview of the website and how to manage your surveys. You'll see the main features, learn how to navigate projects, handle forms, and manage survey data, just enough to understand the basics.



# How KoboToolbox Works



This is where you can see all your projects. From here, you can start new projects, open existing ones, and manage your surveys easily

The Summary tab gives you a quick overview of your project.

**KoboToolbox** Search...

**My Projects** filter fields

| Project name  | Status   | Owner | Last edited | Date modified        | Date deployed    | Submissions |
|---|----------|-------|-------------|----------------------|------------------|-------------|
| <input type="checkbox"/> Data Collection Toolkit for CSOs | deployed | me    | me          | Today at 4:09 AM     | Today at 4:09 AM | 5           |
| <input type="checkbox"/> Test                             | draft    | me    | me          | Yesterday at 4:45 PM |                  | 0           |

**KoboToolbox** Data Collection Toolkit for CSOs

**SUMMARY** FORM DATA SETTINGS

**Project Information**

Description

Status: deployed Questions: 3 Owner: me Last edited: me

Last modified: October 28, 2025 Last deployed: October 26, 2025 Latest submission: October 28, 2025

Sector: Humanitarian - Coordination / Information Management Country: Jordan

Languages: English (en) Arabic (ar)

**Submissions**

Past 7 days Past 31 days Past 3 months Past 12 months

**Quick Links**

- Collect data
- Share project
- Edit form
- Preview form

**Data**

- Table
- Reports
- Gallery
- Downloads
- Map

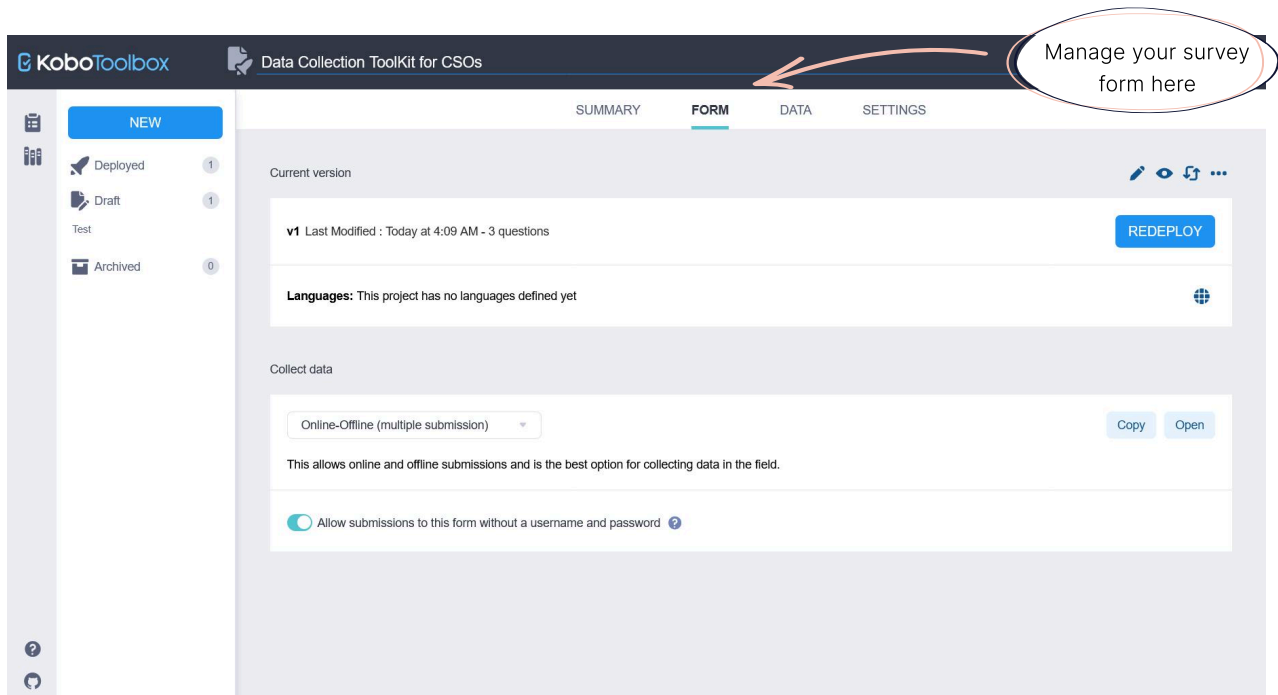
**Team members**



# How KoboToolbox Works

## You can quickly access main actions:

- ✦ Collect Data – start entering survey responses.
- ✦ Share Project – share your project with others.
- ✦ Edit Form – make changes to your survey form.
- ✦ Preview Form – see how the form looks before sharing.

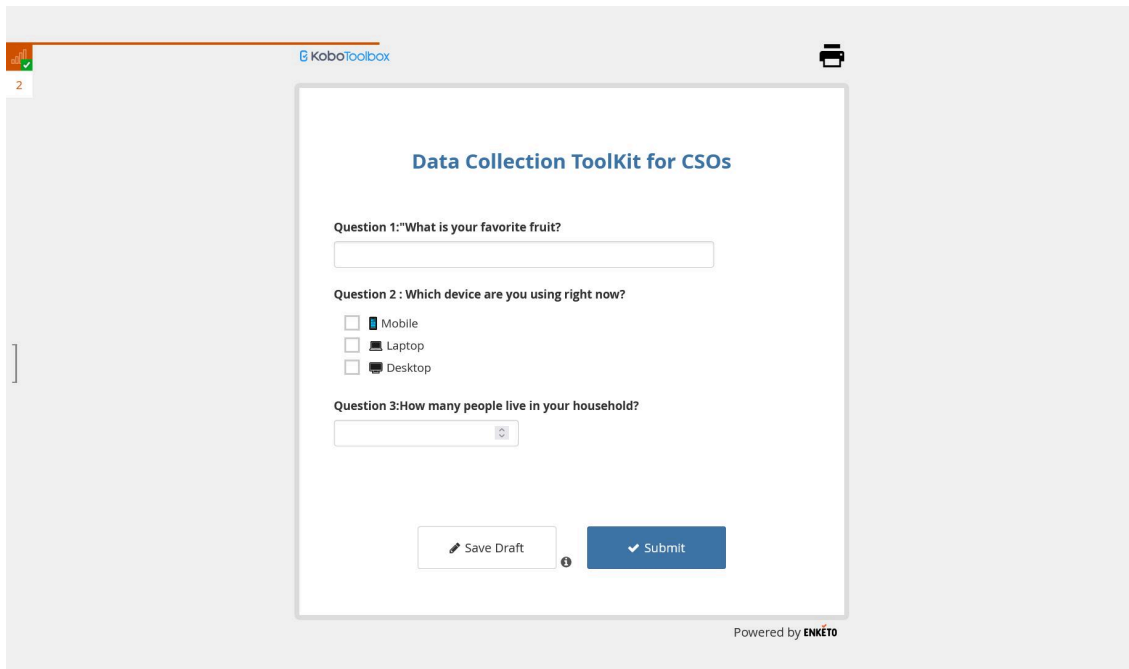


## Key actions:

- ✦ Edit / Form Builder – add or change questions and sections.
- ✦ Preview – see how the form will appear to users.
- ✦ Replace Form – swap the current form with a new version.
- ✦ Copy – Get the form's link to share it or use it elsewhere.
- ✦ Open – Fill out the form directly on the website.
- ✦ Other tools – Clone, Download, Share, Manage Translations, Library.



# How KoboToolbox Works



The screenshot shows the KoboToolbox interface for a data collection form titled "Data Collection ToolKit for CSOs". The form contains three questions:

- Question 1: "What is your favorite fruit?" with a text input field.
- Question 2: "Which device are you using right now?" with three radio button options: Mobile, Laptop, and Desktop.
- Question 3: "How many people live in your household?" with a numeric input field.

At the bottom of the form, there are two buttons: "Save Draft" and "Submit". The "Submit" button is highlighted in blue. The form is powered by ENKETO, as indicated by the text "Powered by ENKETO" at the bottom right.

## Form Tab – Collect Data

- ✦ This page appears when you open the form to enter survey responses.
- ✦ Submit or Save Draft button lets you save your progress.
- ✦ Shows a number in the corner to indicate how many times the form has been filled on this device.
- ✦ Indicates if the form is ready to send.





# How KoboToolbox Works

KoboToolbox Data Collection ToolKit for CSOs

SUMMARY FORM DATA SETTINGS

NEW

Deployed 1

Draft 1

Archived 0

Current version

v2 Last Modified : Today at 12:35 PM - 3 questions

REDEPLOY

Languages: English (en), Arabic (ar)

SHOW FULL HISTORY

Collect data

Online-Offline (multiple submission)

Online-Offline (multiple submissions)

Online-Only (multiple submissions)

Online-Only (single submission)

Online-only (once per respondent)

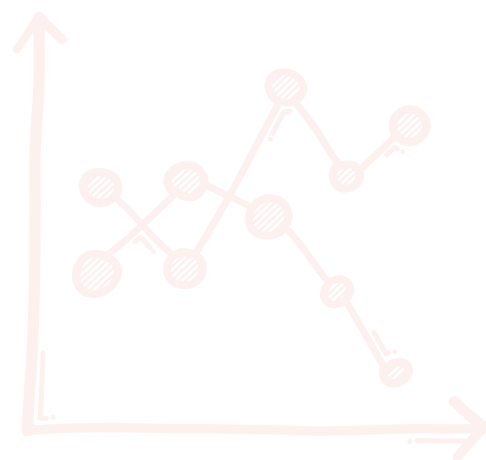
the best option for collecting data in the field.

username and password

Copy Open

## This menu lets you control how the survey can be submitted:

- ✦ Online / Offline: Choose if responses can be collected without internet.
- ✦ Online Only: Responses must be submitted while connected to the internet.
- ✦ Multiple Submissions: Allow the same participant to submit more than once.
- ✦ Single Submission / Once per Respondent: Restrict to one response per participant.





# How KoboToolbox Works

The screenshot shows the KoboToolbox interface. On the left, a sidebar contains a 'NEW' button and a list of survey states: 'Deployed' (1), 'Draft' (1), and 'Archived' (0). Below these are icons for 'Reports', 'Gallery', 'Downloads', and 'Map'. The main area is titled 'Data Collection ToolKit for CSOs' and has tabs for 'SUMMARY', 'FORM', 'DATA' (selected), and 'SETTINGS'. The 'DATA' tab displays a table of survey results. A callout bubble with an arrow points to the 'Table' option in the sidebar, containing the text: 'See all responses collected from your survey'.

| Validation | start            | end              | Question 1: "What is your favorite fruit?" | Question 2: "Which device are you using..." | Question 3: "How many people live in..." | __version__       |
|------------|------------------|------------------|--|---|--|-------------------|
| ~          | Oct 21, 2025 ... | Oct 21, 2025 ... | Apple                                      | Laptop                                      | 9  | vJZ2NQyeaK3xEn... |
| ~          | Oct 21, 2025 ... | Oct 21, 2025 ... | Banana                                     | Laptop                                      | 5  | vJZ2NQyeaK3xEn... |
| ~          | Oct 21, 2025 ... | Oct 21, 2025 ... | Orange                                     | Desktop                                     | 4  | vJZ2NQyeaK3xEn... |
| ~          | Oct 21, 2025 ... | Oct 21, 2025 ... | Apple                                      | Laptop                                      | 2  | vJZ2NQyeaK3xEn... |
| ~          | Oct 21, 2025 ... | Oct 21, 2025 ... | Mango                                      | Mobile                                      | 5  | vJZ2NQyeaK3xEn... |

Page 1 of 1, 30 rows

## Key actions:

- ✦ Table – View responses in a spreadsheet-like format for easy reading and filtering.
- ✦ Reports – Generate summary reports and visualizations of your survey data.
- ✦ Gallery – View uploaded images, videos, or other media collected in the survey.
- ✦ Downloads – Download raw data for offline use or further analysis.
- ✦ Maps – Visualize geolocation responses on a map.



# How KoboToolbox Works

The screenshot shows the KoboToolbox interface for the 'Data Collection ToolKit for CSOs'. The 'SETTINGS' tab is active, displaying fields for 'Project Name (required)' (filled with 'Data Collection ToolKit for CSOs'), 'Description' (with a placeholder 'Enter short description here'), 'Sector (required)' (filled with 'Humanitarian - Coordination / Information Management'), and 'Country (required)' (filled with 'Jordan'). A red arrow points from a callout bubble to the 'SETTINGS' tab. The callout bubble contains the text: 'See all responses collected from your survey'.

## Key actions:

- ✦ General – basic project info.
- ✦ Media – manage attached files.
- ✦ Sharing – Share the project with others and set permissions.
- ✦ Connect Projects – link related projects.
- ✦ Activity – see project activity history.

## ⑨ Advanced Data Analysis

KoboToolbox provides dashboards with summaries of collected data. For deeper analysis:

- ✦ Export Options: Download data in Excel, CSV, or SPSS formats.
- ✦ External Analysis: Connect exported data to R, Python, or open-source BI tools like Metabase or Superset.
- ✦ Visual Summaries: Generate charts, pivot tables, or dashboards based on exported data.





Tool #2:

# LimeSurvey



# LimeSurvey

LimeSurvey is an open-source online survey tool designed to help organizations create, distribute, and analyze surveys efficiently. It allows full control over data storage and privacy, which makes it highly suitable for Civil Society Organizations (CSOs) concerned with data protection and independence. LimeSurvey supports multilingual surveys, customizable designs, and both hosted and self-hosted deployment options giving CSOs flexibility based on their technical capacity and security needs.

## Use Cases

CSOs can use LimeSurvey in several ways to support their programs and data collection activities, including:



### **Community Feedback Surveys:**

Collect feedback from beneficiaries or local communities on project outcomes and satisfaction levels.



### **Needs Assessments:**

Identify community priorities or emerging needs to guide future programming.



### **Training and Workshop Evaluations:**

Gather feedback after capacity-building sessions or awareness workshops.



### **Volunteer or Beneficiary Registration:**

Use LimeSurvey to securely collect participant information and consent forms



## How LimeSurvey Works

- ① Create an Account and Login
- ② Create Your First Survey
- ③ Manage Translations
- ④ Assign Roles to Your Survey
- ⑤ Distribute the Survey
- ⑥ Collect and Monitor Responses
- ⑦ Manage Surveys
- ⑧ Analyze and Export Data

You're now using the LimeSurvey editor. This quick tutorial will guide you through what's most important in just a few steps.

### ① Create an Account and Login

To start using LimeSurvey, you first need to create an account and access the platform through your web browser: <https://www.limesurvey.org>. LimeSurvey provides a simple web interface where you can design, manage, and share surveys.

Note: LimeSurvey can be used via the hosted Cloud service (easiest option for most CSOs) or a self-hosted version for full control over your data

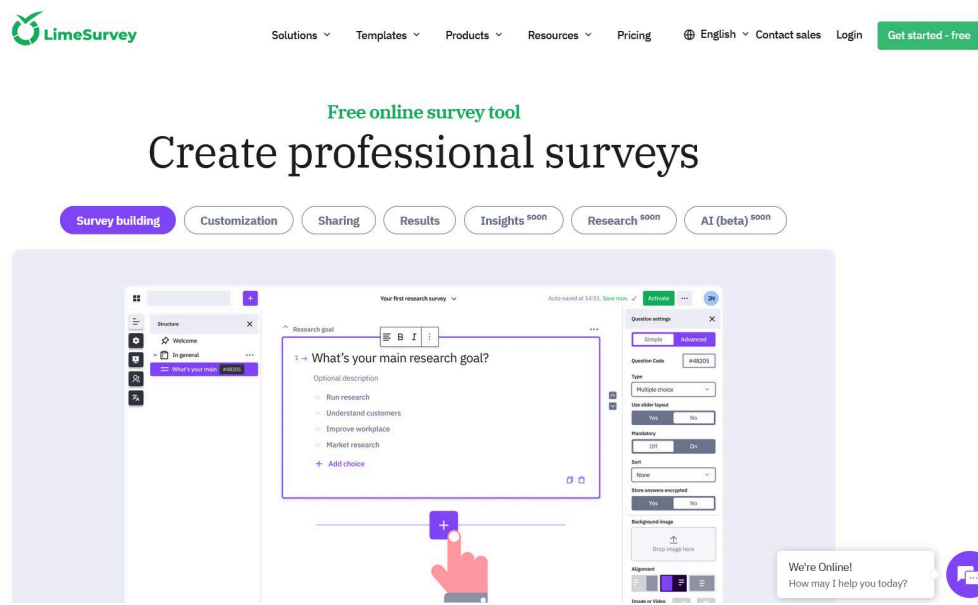




# How LimeSurvey Works

## 1 Homepage

The main screen is where you see all forms and manage your data collection. From here you can start, continue, or send forms.



## 2 Sign up

Click "Get Started" / Sign Up, then enter your email, username, and password to create a new LimeSurvey account

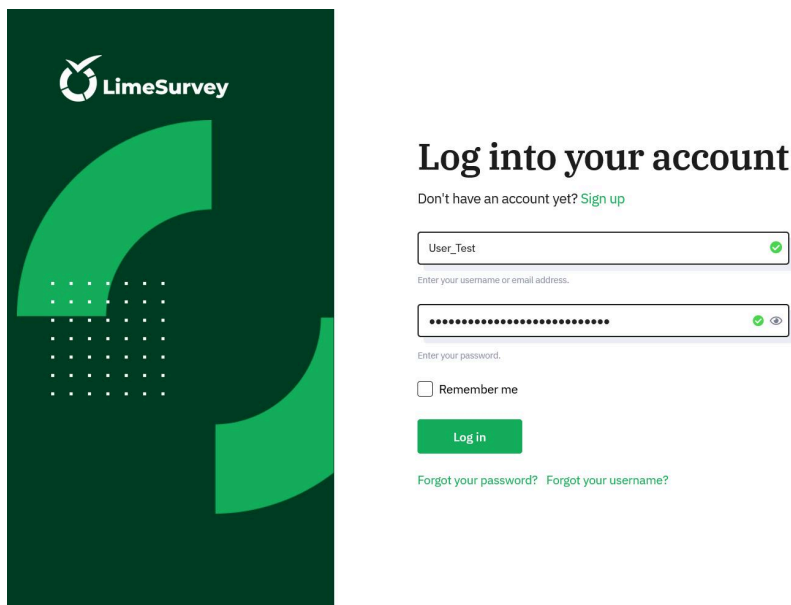
The screenshot shows the LimeSurvey sign-up page. On the left is a dark green sidebar with the LimeSurvey logo and a large green graphic. The main content area has the heading 'Sign up for free' and a link 'Already have an account? Log in'. Below this are four input fields: 'Username' (with a note 'Enter your desired username - min. 6 characters, no spaces.'), 'Password' (with a note 'Enter your desired password - min. 8 characters, 1 uppercase, 1 number.' and an eye icon), 'Email Address' (with a note 'Enter your email address.'), and 'Your role' (a dropdown menu with the note 'Select a role.'). Below the fields is a checkbox with the text 'By clicking on "Create account" below, you are agreeing to our Terms & Conditions and to our Privacy policy.' and a link 'See options'. At the bottom is a green button labeled 'Create account'.



# How LimeSurvey Works

## 3 Login

Once your account is created, go to the Login page and enter your credentials to access the dashboard.



**Log into your account**

Don't have an account yet? [Sign up](#)

User\_Test ✓

Enter your username or email address.

..... ✓

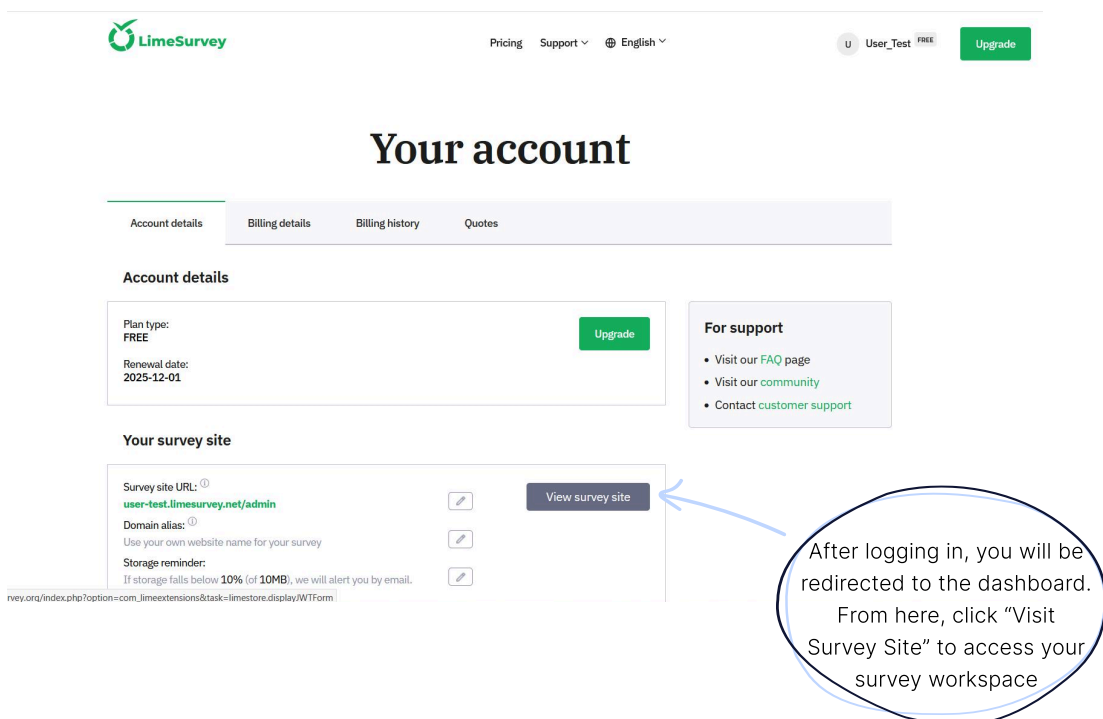
Enter your password.

☐ Remember me

[Log in](#)

[Forgot your password?](#) [Forgot your username?](#)

## 4 Dashboard / Visit Survey Site



**Your account**

Account details Billing details Billing history Quotes

**Account details**

Plan type: FREE Upgrade

Renewal date: 2025-12-01

**For support**

- Visit our [FAQ page](#)
- Visit our [community](#)
- Contact [customer support](#)

**Your survey site**

Survey site URL: [user-test.limesurvey.net/admin](#) View survey site

Domain alias: Use your own website name for your survey

Storage reminder: If storage falls below 10% (of 10MB), we will alert you by email.

After logging in, you will be redirected to the dashboard. From here, click "Visit Survey Site" to access your survey workspace



# How LimeSurvey Works

## ② Create Your First Survey

When you start creating a survey in LimeSurvey, the platform provides a dashboard and survey workspace with multiple tools to manage your survey efficiently.

## 1 Dashboard Overview

The main screen is where you see all forms and manage your data collection. From here you can start, continue, or send forms. This is the main dashboard after logging in. From here, you can:

The screenshot shows the LimeSurvey dashboard interface. Callouts highlight the following features:

- See a list of all your surveys:** Points to the 'All surveys' link in the top left navigation bar.
- Search for a specific survey using the search bar:** Points to the search input field in the top navigation bar.
- Filter surveys by status (active, inactive) or group:** Points to the 'Status' and 'Group' dropdown filters in the top navigation bar.
- Quickly create a new survey using the "Create Survey" button:** Points to the '+ Create survey' button in the top right corner.

The main content area displays a table of surveys:

|                          | Survey ID | Status   | Title                            | Created    | Responses | Action  |
|--------------------------|-----------|----------|----------------------------------|------------|-----------|---|
| <input type="checkbox"/> | 557415    | Inactive | Data Collection Toolkit for CSOs | 2025-11-01 | 0         | <a href="#">Edit</a> <a href="#">Check</a> <a href="#">Chart</a> <a href="#">More</a> |

At the bottom of the table, it says 'Displaying 1-1 of 1 result(s)' and '5 rows per page'.

## 2 Survey Workspace

In the survey workspace, you have access to all the main tools to manage your survey efficiently. This includes the question list, main survey controls, and a left-hand menu to navigate different survey settings.



# How LimeSurvey Works

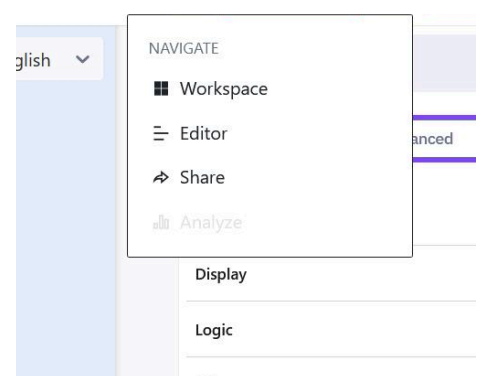
The screenshot displays the LimeSurvey Data Collection Toolkit interface. At the top, the LimeSurvey logo is on the left, followed by a purple plus icon, the title "Data Collection Toolkit for CSOs", a "Saved at 12:55" status, and buttons for "Reactivate" and "Upgrade". A vertical sidebar on the left contains icons for home, settings, survey, questions, users, and a star icon. The main area shows a survey form with three questions:

- Question 1:** "What is your favorite fruit?" with an "Optional help description" and a text input field labeled "Enter your answer here."
- Question 2:** "Which device are you using right now?" with an "Optional help description" and three radio button options: "Mobile", "Laptop", and "Desktop".
- Question 3:** "How many people live in your household?" with an "Optional help description" and a text input field labeled "Enter your answer here."

Below the questions is a purple plus icon and a line. At the bottom, there is an "End screen" section with a "Thank You!" message and a green "Finish" button.

**This area contains the main survey management tools:**

- ✦ Activate – make the survey live for participants
- ✦ Three Dots Menu – access additional options: Share, Analyze, Workplace, and Editor.
- ✦ Preview – check the survey for errors or missing items before activation.





# How LimeSurvey Works

## Data Collection ToolKit for CSOs

Question 2 : Which device are you using right now?

Choose one of the following answers

☐ Mobile ☐ Laptop ☐ Desktop ☒ No answer

Next

Made in LimeSurvey [↗](#)

### 3 The left-hand menu

Drag and drop the questions you need using the form builder. Preview the survey to make sure it works as expected. Navigate the survey features from the left-hand menu, which includes:

- ✦ Structure – organize question groups and questions.
- ✦ Settings – manage survey settings.
- ✦ Themes – customize the survey appearance.
- ✦ Presentations / Options – control layout, navigation, and survey behavior.
- ✦ Survey Menu - Used to access general survey tools such as preview, logic files, and token management.
- ✦ Permissions - Allows you to assign user roles and define what each user is allowed to do within the survey.
- ✦ Quick Translation – Provides tools to switch languages and manage translations for all survey texts.





# How LimeSurvey Works

## 1 Survey Structure

Organize your survey content into groups and questions.

### Key options explained:

- ✦ Question Groups – create sections within the survey.
- ✦ Questions – add, edit, and reorder questions within groups.
- ✦ Randomization / Conditions – control question or group display order

## 2 Survey Settings

The Survey Settings tab provides all essential configuration options for how your survey behaves, what data it collects, and how participants access it. Each sub-tab controls a different part of the survey setup. The following screenshots illustrate the key settings available.

The screenshot displays the LimeSurvey Settings interface. On the left is a sidebar with a 'Settings' header and a list of sub-tabs: General (selected), Privacy policy, Participant settings, Publication & access, and Notifications & data. The main content area is titled 'General' and contains several configuration fields:

- Survey languages:** A dropdown menu showing 'English' and 'Arabic' with 'x' icons to remove them.
- Base language:** A dropdown menu set to 'English'.
- Survey owner:** A dropdown menu set to 'User\_Test'.
- Administrator:** A text input field containing 'Administrator'.
- Administrator email address:** A text input field with the placeholder 'Enter here'.
- Bounce email address:** A text input field with the placeholder 'Enter here'.
- Group:** A dropdown menu set to 'Default'.
- Format:** A dropdown menu set to 'Question by question'.

Below the General section is the 'Theme' section, which includes:

- Theme:** A dropdown menu set to 'Fruity\_twentythree'.
- Theme preview:** A box showing the 'fruity TwentyThree' theme with five green stars.



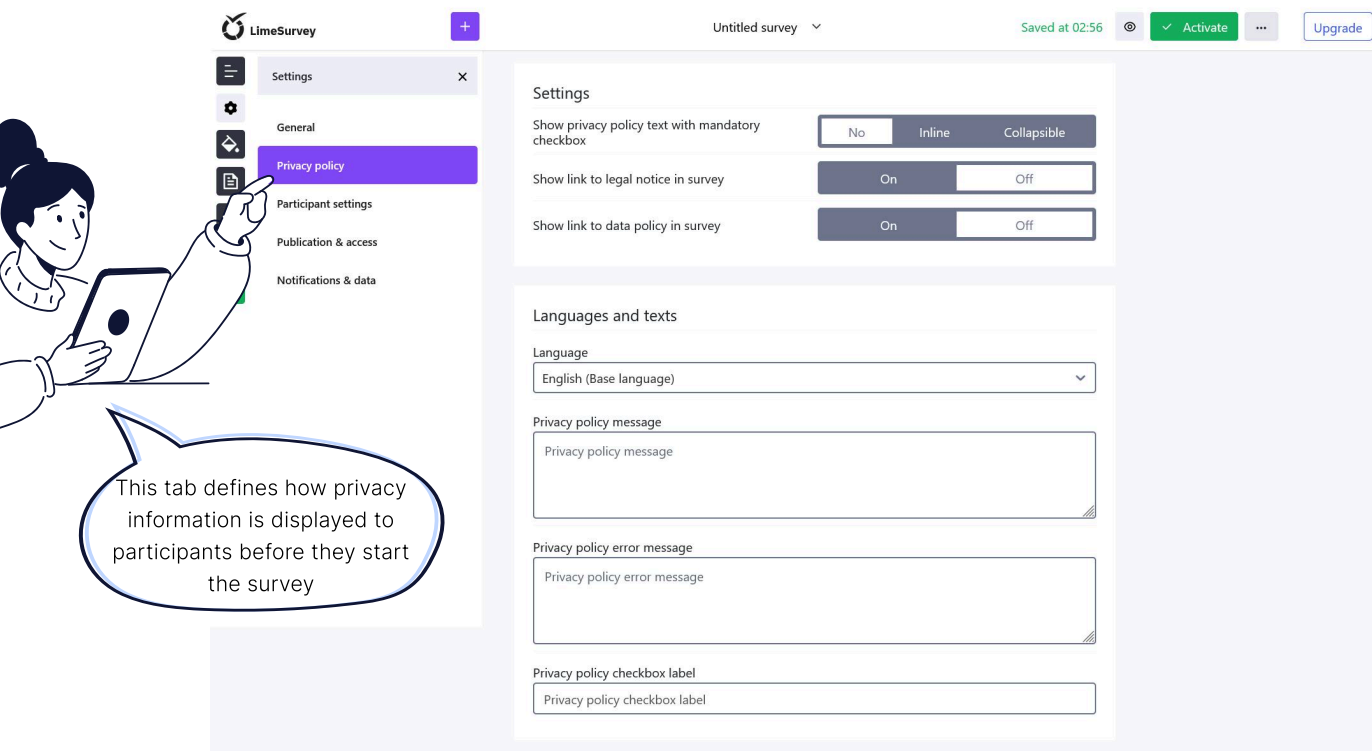
# How LimeSurvey Works

## Controls the visual appearance of your survey:

- ✦ Select Theme – choose a style (Fruity 23).
- ✦ Preview Theme – view the survey appearance before applying.

## Key options explained:

- ✦ Survey Languages / Base Language – sets the main survey language.
- ✦ Survey Owner / Administrator – defines who manages the survey.
- ✦ Administrator Email – email for system notifications.
- ✦ Bounce Email Address – email to handle delivery failures.
- ✦ Response Format – stores answers question-by-question or group-by-group.



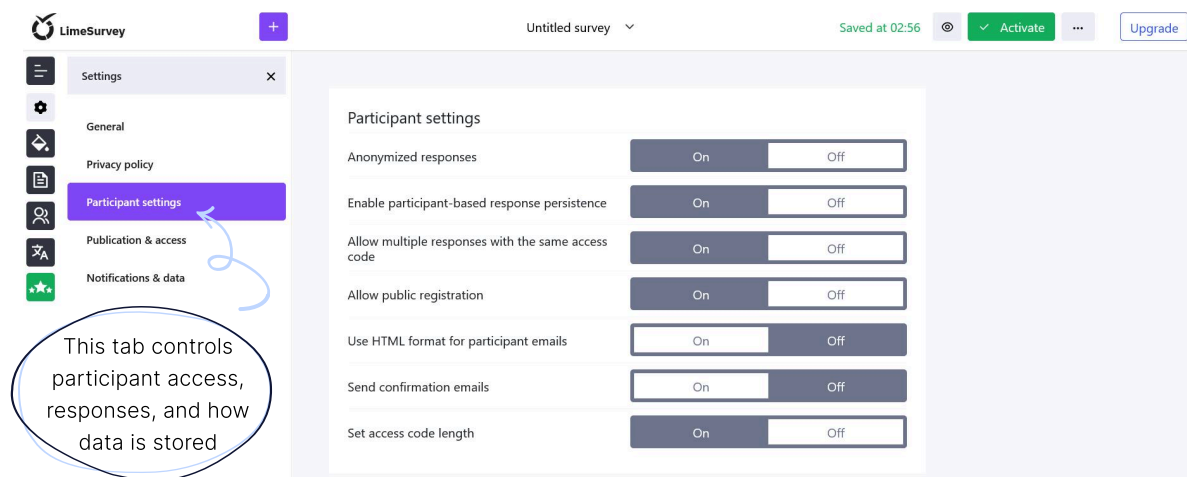
The screenshot shows the LimeSurvey interface with the 'Settings' tab selected. The left sidebar contains a menu with 'Settings', 'General', 'Privacy policy', 'Participant settings', 'Publication & access', and 'Notifications & data'. The 'Privacy policy' tab is highlighted. The main content area shows the 'Settings' section with three options: 'Show privacy policy text with mandatory checkbox' (set to 'Collapsible'), 'Show link to legal notice in survey' (set to 'On'), and 'Show link to data policy in survey' (set to 'On'). Below this is the 'Languages and texts' section, which includes a 'Language' dropdown menu (set to 'English (Base language)'), a 'Privacy policy message' text area, a 'Privacy policy error message' text area, and a 'Privacy policy checkbox label' text area. A cartoon character is pointing to the 'Privacy policy' tab in the sidebar, and a speech bubble says: 'This tab defines how privacy information is displayed to participants before they start the survey'.



# How LimeSurvey Works

## Key options explained:

- ✦ Show privacy policy with mandatory checkbox – participants must accept before continuing.
- ✦ Checkbox layout options – inline, collapsed, or separate.
- ✦ Show link to legal notice – optional link to legal info.
- ✦ Show link to data policy – optional link to data protection policy.
- ✦ Languages & Texts – define messages in base language: Privacy Policy Message, Error Message, Checkbox Label

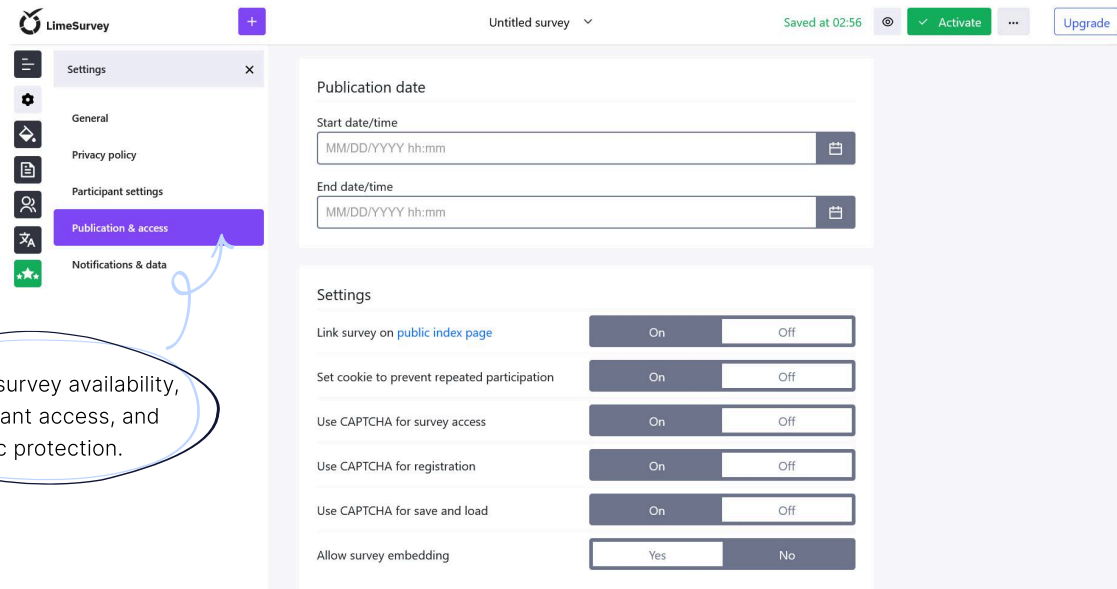


## Key options explained:

- ✦ Anonymized responses – hides participant identity when enabled.
- ✦ Participant-based responses per session – links responses to participant session.
- ✦ Allow multiple responses with same access code – multiple submissions per token.
- ✦ Allow public registration – participants can register themselves.
- ✦ Use HTML format for participant emails – rich-text emails.
- ✦ Send confirmation emails – automatic confirmation after submission.
- ✦ Set access code length – defines token length.



# How LimeSurvey Works



Controls survey availability, participant access, and basic protection.

Publication date

Start date/time  
MM/DD/YYYY hh:mm

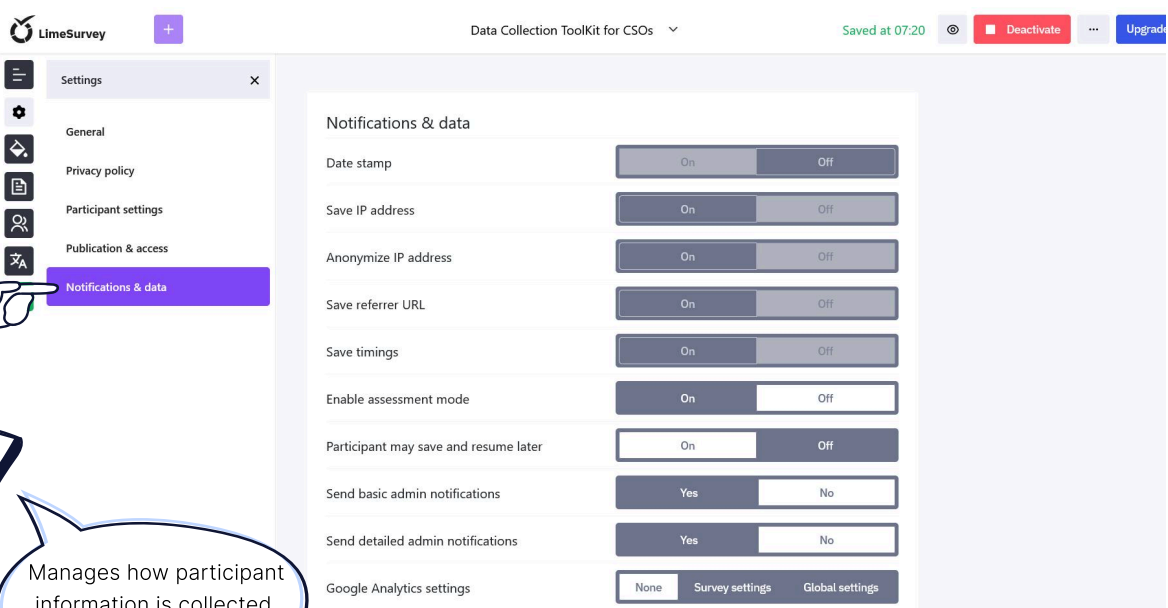
End date/time  
MM/DD/YYYY hh:mm

Settings

|  |     |     |
|--|-----|-----|
| Link survey on <a href="#">public index page</a> | On  | Off |
| Set cookie to prevent repeated participation     | On  | Off |
| Use CAPTCHA for survey access                    | On  | Off |
| Use CAPTCHA for registration                     | On  | Off |
| Use CAPTCHA for save and load                    | On  | Off |
| Allow survey embedding                           | Yes | No  |

## Key options explained:

- ✦ Start / End date & time – defines survey availability period.
- ✦ Include survey in public index – display on LimeSurvey public list.
- ✦ Set cookies to prevent repeated participation – blocks multiple submissions via browser.
- ✦ Use CAPTCHA for survey access / registration / save & load – prevent spam or bots.



Manages how participant information is collected, stored, and processed.

Notifications & data

|                                       |                                      |     |
|---------------------------------------|--------------------------------------|-----|
| Date stamp                            | On                                   | Off |
| Save IP address                       | On                                   | Off |
| Anonymize IP address                  | On                                   | Off |
| Save referrer URL                     | On                                   | Off |
| Save timings                          | On                                   | Off |
| Enable assessment mode                | On                                   | Off |
| Participant may save and resume later | On                                   | Off |
| Send basic admin notifications        | Yes                                  | No  |
| Send detailed admin notifications     | Yes                                  | No  |
| Google Analytics settings             | None Survey settings Global settings |     |



# How LimeSurvey Works

## Key options explained:

- ✦ Basic Admin Notifications – sends simple notifications to administrators when responses are submitted.
- ✦ Detailed Admin Notifications – sends full details about each submission, including participant data if available.
- ✦ Save Timestamps – records the time each response is submitted.
- ✦ Save Referral URL – stores the link or page from which participants accessed the survey.
- ✦ Anonymize IP Address – hides participant IP addresses to protect privacy.
- ✦ Enable Save & Resume Later – allows participants to pause and continue the survey at a later time.
- ✦ Google Analytics Integration – optional tracking of survey activity for analytics and reporting

## 3 Survey Presentation

The Theme Options tab lets you control the main visual style of your survey, including fonts, images, and key display settings



# How LimeSurvey Works

## Key options explained:

- ✧ Select Theme / Variation – choose the overall look and style.
- ✧ Font – set the survey font (IBM Sans).
- ✧ Background & Logo Images – add images to brand the survey.
- ✧ Privacy Info & Mandatory Validation – show participants privacy messages and mark required questions.
- ✧ Help Text Position – control where help text appears for questions.

< Themes

Upload & install

Survey themes Admin themes Question themes

Installed survey themes:

| <input type="checkbox"/> | Preview | Name  | Description   | Type       | Extends     |
|--------------------------|---------|---|---|------------|-------------|
| <input type="checkbox"/> |         |   |   |            |             |
| <input type="checkbox"/> |         | <b>Bootswatch</b><br>bootswatch                 | Based on BootsWatch Themes:<br><a href="#">Visit Bootswatch page</a>  | Core theme | vanilla ... |
| <input type="checkbox"/> |         | <b>Fruity</b><br>fruity                         | A fruity theme for a flexible use. This theme offers monochromes variations and many options for easy customizations. | Core theme | vanilla ... |
| <input type="checkbox"/> |         | <b>Fruity TwentyThree</b><br>fruity_twentythree | Our default theme for a fruity and flexible use. This theme offers single color variations                            | Core theme | ...         |
| <input type="checkbox"/> |         | <b>Bootstrap Vanilla</b><br>vanilla             | A clean and simple base that can be used by developers to create their own Bootstrap based theme.                     | Core theme | ...         |

Selected theme(s)...

Displaying 1-4 of 4 result(s). 10 rows per page

Types of Themes



The Presentation tab controls how your survey is displayed and how participants navigate through it.

Key options focus on layout, navigation, and how survey content is presented.



# How LimeSurvey Works

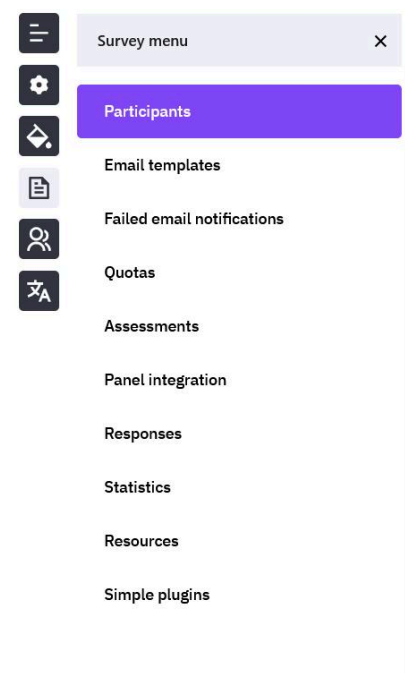
## Key options explained:

- ✦ Display / Language-specific Display – adjust what participants see based on the survey language.
- ✦ Data / Date Format – set how dates and numeric values are displayed in responses.
- ✦ Survey Alias – define a short internal name for the survey used in URLs or reports.
- ✦ Navigation Options – manage back/forward buttons, automatic page loading, and behavior when the survey is completed.
- ✦ Participant View / Print Answers – allow participants to view or print their responses.
- ✦ Public Statistics / Charts – optionally show aggregated results or visual charts to participants

## Survey Menu

The Survey Menu provides a set of tools to manage participants, emails, codes, assessments, and integrations. These options help organizations efficiently control access, communication, and survey-related settings.

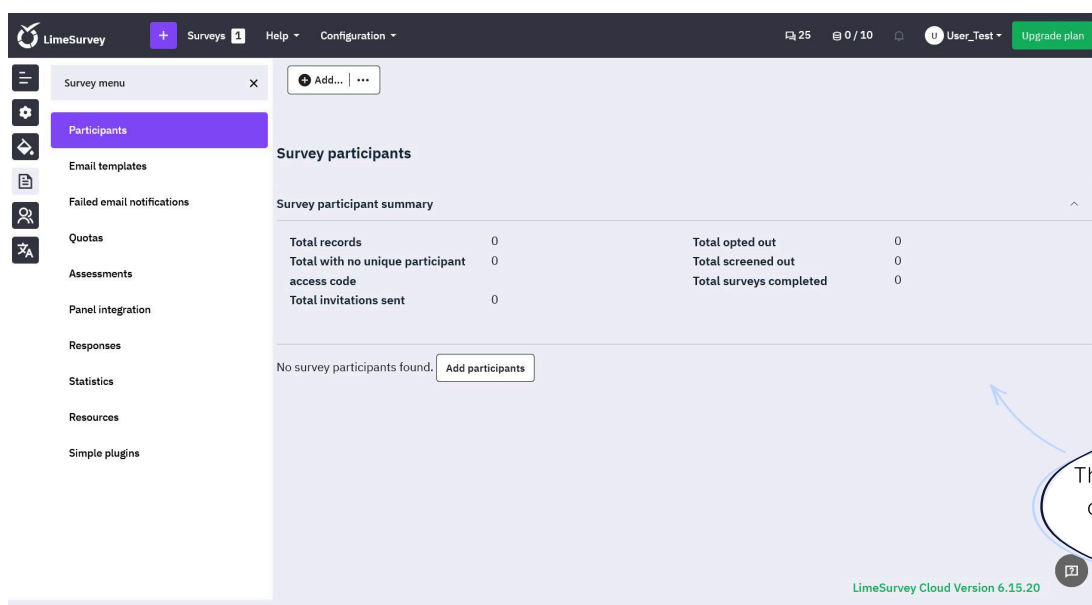
- ✓ Participants – manage survey participants, add or import users, control registration type, and track participation status.
- ✓ Email Templates – create and customize email messages for invitations, reminders, and confirmations.
- ✓ Failed Email Notifications – view undelivered emails and retry sending to participants.
- ✓ Quotas – set limits on how many responses are allowed for specific groups or categories





# How LimeSurvey Works

- ✓ Assessments – assign scores to question responses and configure evaluation rules.
- ✓ Panel Integration – connect external participant panels and synchronize participant data.
- ✓ Statics / Charts – view aggregated survey results or visual charts; optionally share with participants.
- ✓ Resources – upload and manage supplementary files used within the survey.
- ✓ Simple Plugins – access simplified survey tools and manage optional plugins to enhance functionality.



This screen shows an overview of survey participants.

## Key features:

- ✦ Total Records – total participants listed in the survey.
- ✦ Total with no unique participant / Access Code – indicates participants without unique codes.
- ✦ Total Invitations Sent – how many invitations were sent.
- ✦ Total Opted Out / Screened Out – participants who opted out or were screened out.
- ✦ Total Surveys Completed – number of completed surveys.
- ✦ Add Participant – button to create a new participant manually.



# How LimeSurvey Works

Survey Settings X

General

Privacy policy

Participants

Publication & access

Notifications & data

Add survey participant

ID: Auto

Completed? Yes No

First name:

Last name:

Access code:

Language: English

You can leave this blank, and automatically generate access codes using "Generate access codes"

Email:

Email status: OK

Invitation sent? Yes No

Reminder sent? Yes No

Uses left: 1

Close Save and close Save

## Key features:

- ❖ Access Code – assign a unique code to control survey access.
- ❖ Participant Details – first name, last name, language, email.
- ❖ Survey Status – mark whether completed (Yes / No).
- ❖ Reminders & Invitations – track whether reminders or invitations were sent.
- ❖ Valid Form – indicate if participant's information is valid.



# How LimeSurvey Works

The Email Templates tab provides tools to customize messages sent to survey participants. These templates help manage invitations, reminders, confirmations, registrations, and administrative notifications efficiently.

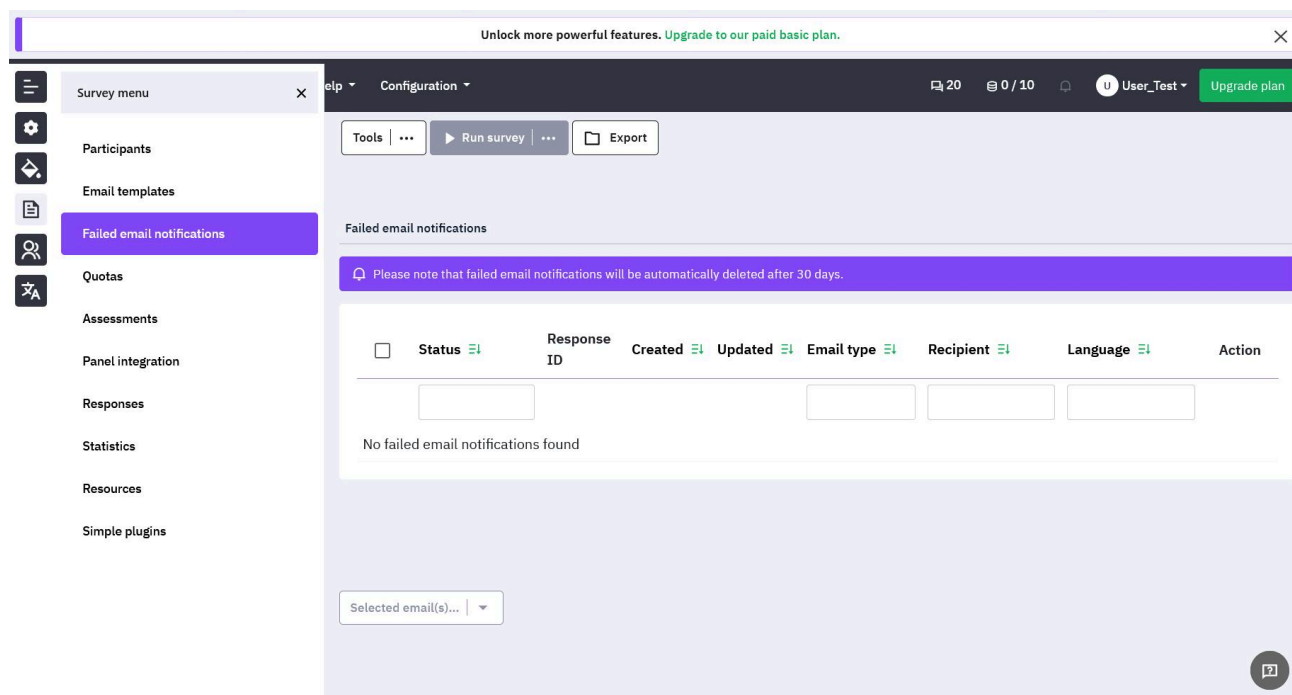
The screenshot shows the LimeSurvey web interface. On the left is a sidebar menu with options: Survey menu, Participants, Email templates (highlighted), Failed email notifications, Quotas, Assessments, Panel integration, Responses, Statistics, Resources, and Simple plugins. The main area is titled 'Edit email templates' and has tabs for 'English (Base language)' and 'Arabic'. Under the 'English' tab, there are sub-tabs for 'Invitation', 'Reminder', 'Confirmation', 'Registration', 'Basic admin notification', and 'Detailed admin notification'. The 'Invitation' sub-tab is active. It contains a text box for 'Invitation email subject:' with the value 'Invitation to participate in a survey'. Below it is a rich text editor for 'Invitation email body:' containing the text: 'Dear (FIRSTNAME),', 'You have been invited to participate in a survey.', 'The survey is titled:', '"(SURVEYNAME)"', and '"(SURVEYDESCRIPTION)"'. At the bottom, there are buttons for 'Validate ExpressionScript', 'Reset this template', and 'Add file' under the 'Invitation attachments:' section. The top of the interface shows the LimeSurvey logo, a 'Surveys' tab with a count of 1, 'Help', and 'Configuration' links. On the right, it shows '25' votes, '0 / 10' progress, a user profile for 'User\_Test', and an 'Upgrade plan' button. A footer at the bottom right indicates 'LimeSurvey Cloud Version 6.15.20'.

## What you can do in this tab:

- ✦ Select the template type – Invitation, Reminder, Confirmation, Registration, Basic or Detailed Admin Notification.
- ✦ Edit email subject and body – define clear messages for participants or admins.
- ✦ Attach files – include relevant documents or instructions.
- ✦ Validate content – check for formatting or expression errors.
- ✦ Apply scripts – add custom behavior if needed.
- ✦ Reset template – revert to default content.



# How LimeSurvey Works



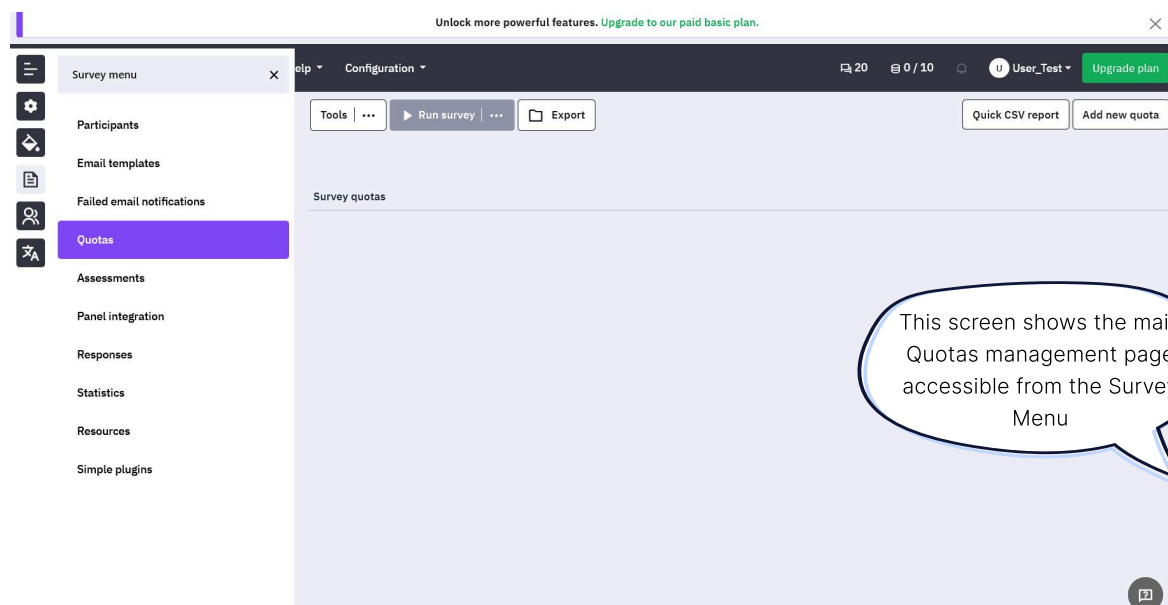
The Failed Email Notifications tab helps you track and manage emails that were not delivered successfully, ensuring participants receive required messages.

## What you can do in this tab:

- ✦ View email status – check which emails failed or succeeded.
- ✦ Identify participant responses – link failed emails to specific survey responses using Response ID.
- ✦ Check timestamps – see when emails were created or last updated.
- ✦ Filter by email type and language – manage failed emails for invitations, reminders, or other notifications in different languages.
- ✦ Take actions – retry sending, review content, or correct errors.



# How LimeSurvey Works



## What you can do in this tab:

- ✦ Quick CSV Report – quickly view collected responses per quota.
- ✦ Add New Code – create a new quota for a specific group.
- ✦ Tools – access quota management tools.
- ✦ Delete Survey – remove a quota or the survey entirely.
- ✦ Quick Translation – manage translations for quota labels (English / Arabic).
- ✦ Survey Logic File – access files containing conditions and rules associated with quotas.



# How LimeSurvey Works



Tools | ...

▶ Run survey | ...

📁 Export

🗑️ Delete survey

🌐 Quick-translation

🔄 Reset conditions

Survey logic file

QA English

QA Arabic

Unlock more powerful features. [Upgrade to our paid basic plan.](#)

Survey Settings

General

Privacy policy

Participants

Publication & access

Notifications & data

Tools | ...

▶ Run survey | ...

📁 Export

Save

New quota

Quota name \*

Limit \*

Quota action \*

Active

Autoload URL

English (Base language)

Arabic

Quota message: \*

URL:

URL Description:



# How LimeSurvey Works

## Features shown in the screenshot:

- ✦ Quota Name / Limit – assign a name and define the maximum number of responses.
- ✦ Quota Action – choose how the survey behaves when the quota is reached (terminate after related visible or hidden questions are submitted).
- ✦ Questions – link the quota to specific survey questions.
- ✦ Quota Message – message displayed to participants when the limit is reached.
- ✦ URL / Description – optional link or description for the quota.
- ✦ Control Buttons – Save, Run Survey, Export, Tools for managing the quota.

## Creating Survey Group

Groups help structure your survey into sections, especially if it covers multiple themes or topics.

You can create a new Survey group by clicking the "+" button on the dashboard or workspace

**Share survey**

|                             |   |
|-----------------------------|---|
| English (Base language):    | <a href="https://user-test.limesurvey.net/557415?lang=en">https://user-test.limesurvey.net/557415?lang=en</a> |
| Arabic:                     | <a href="https://user-test.limesurvey.net/557415?lang=ar">https://user-test.limesurvey.net/557415?lang=ar</a> |
| End URL:                    | -   |
| Number of questions/groups: | 3/1   |
| Sharing panel:              | <button>Open sharing panel</button>   |

**Text elements**

|              |   |
|--------------|---|
| Description: |   |
| Welcome:     | Welcome to LimeSurvey – A Secure Survey Tool for CSOs |
| End message: | Thank You!  |

**Publication and access settings**

|                       |    |
|-----------------------|----|
| Start date/time:      | -  |
| Expiration date/time: | -  |
| Listed publicly:      | No |

**Survey general settings**

|                |   |
|----------------|---|
| Owner:         | User_Test (ayahabualnadi@gmail.com)     |
| Administrator: | Administrator (your-email@example.net)  |
| Theme:         | Fruity TwentyThree (fruity twentythree) |



# How LimeSurvey Works

The screenshot shows the 'Create survey group' form in LimeSurvey. The form includes the following fields and annotations:

- Code \***: A text input field containing 'SG04'. Annotation: 'Code – an internal identifier for reference or analysis purposes'.
- Title \***: An empty text input field. Annotation: 'Title – the name of the group, displayed to respondents'.
- Description**: A large text area. Annotation: 'Description – a brief explanation of the group's purpose'.
- Sort order \***: A text input field containing '4'. Annotation: 'Sort Order – controls the order in which this group appears in the survey'.
- Parent group**: A dropdown menu with 'No parent group' selected. Annotation: 'Parent Group – allows creating subgroups under a main group.'.
- Owner**: A dropdown menu.

Other elements visible on the page include the LimeSurvey logo, navigation tabs (Surveys, Help, Configuration), a top bar with user information and an 'Upgrade plan' button, and a right sidebar with a user menu (Account, Membership & billing, Editor version, Logout) and a 'Save' button.

Note: Survey Groups allow you to organize multiple surveys under the same theme. This is optional and not required if you are only creating one survey.





# How LimeSurvey Works

## 5 Add Questions & Questions Types

### ✓ Creating Question Group

Search for a question type

+ Add question group

**Single choice**

- List (radio)
- List with comment (Radio)
- List image select (Radio)
- 5 point choice
- Dropdown
- Single choice buttons

**Multiple choice**

- Multiple choice
- Multiple choice with comments
- Multiple choice buttons
- Image select multiple choice

**Ranking & Rating**

- Ranking advanced
- Gender
- Yes/No

**Dates & data**

- Map/browser detection
- Date/Time

**Text**

- Short text
- Long text

**123 Number**

- Numerical input
- Multiple numerical inputs

To structure your survey, questions can be organized into groups

After clicking the "+" button to create a new question group, you can fill in the group details

Data Collection Toolkit for CSOs 3

1→ Question 1: "What is your favorite fruit?"

Optional help description

Enter your answer here.

2→ Question 2 : Which device are you using right now?

Optional help description


Mobile

The survey has two question groups under the Structure tab, organizing related questions




# How LimeSurvey Works


After clicking the button, a side panel appears where you can define the group details:




**Title:**  
The name of the group



**Description:**  
A short explanation of what this section covers



**Randomization Group:**  
Optional; used to randomize the display order of groups



**Condition:**  
Allows you to show this group only when specific conditions are met

## Adding Questions and Selecting Question Types

Search for a question type

+ Add question group

Single choice

List (radio)

List with comment (Radio)

List image select (Radio)

5 point choice

Dropdown

Single choice buttons

Dates & data

Map/browser detection

Date/Time

Multiple choice

Multiple choice

Multiple choice with comments

Multiple choice buttons

Image select multiple choice

Text

Short text

Long text

Ranking & Rating

Ranking advanced

Gender

Yes/No

123 Number

Numerical input

Multiple numerical input

Click 'Add Question' in the survey workspace to open the available question types

Data Collection Toolkit

JOSA



## How LimeSurvey Works

When adding a new question, you can choose from a variety of question types depending on your data collection needs. Common options include:

- ❖ Multiple Choice (Single or Multiple Answers) – select one or more options from a list.
- ❖ Short Text / Long Text – open-ended text responses.
- ❖ Numeric Input – collect numbers for calculations or analysis.
- ❖ List / Dropdown – select one answer from a dropdown list.
- ❖ Date / Time – enter a specific date or time.
- ❖ Ranking / Yes-No – rank options or answer yes/no questions.

Choosing the right question type ensures your survey collects accurate and analyzable data.

The screenshot displays the LimeSurvey interface. At the top, there is a green 'Start survey' button and a text prompt 'or press ↵'. Below this, the 'Data Collection ToolKit for CSOs' is shown with a tab indicator '3'. The main area contains two questions: 'Question 1: "What is your favorite fruit?"' and 'Question 2 : Which device are you using right now?'. A purple box highlights the first question, which has an 'Optional help description' and a text input field labeled 'Enter your answer here.'. To the right, a 'General' settings panel is visible, showing 'Question code' as 'Q00' and 'Type' as 'Short text'. Below the settings panel, a 'Search for a question type' dropdown menu is open, listing various options under 'Single choice' and 'Multiple choice' categories. A cartoon character with a speech bubble is on the right, pointing to the settings panel. The speech bubble contains the text: 'If needed, you can change the question type later via Settings → General tab.'

Start survey or press ↵

General

Question code Q00

Type Short text

Data Collection ToolKit for CSOs 3

1→ Question 1: "What is your favorite fruit?"

Optional help description

Enter your answer here.

2→ Question 2 : Which device are you using right now?

Search for a question type

Single choice

- List (radio)
- List with comment (Radio)
- List image select (Radio)
- 5 point choice
- Dropdown
- Single choice buttons

Multiple choice

- Multiple choice
- Multiple choice with comments

If needed, you can change the question type later via Settings → General tab.



# How LimeSurvey Works

## ✔ Question Setting

Each question in LimeSurvey has multiple settings tabs that allow you to configure how the question behaves, appears, and is analyzed. These include General, Display, Logic, Other, Statistics, and Timer. Adjusting these settings ensures accurate data collection and a smooth participant experience.

The screenshot shows the LimeSurvey 'Question settings' interface for a survey titled 'Data Collection Toolkit for CSOs'. The interface is in English and shows a list of questions. The first question, 'Question 1: "What is your favorite fruit?"', is highlighted with a purple box. Below the question text is an 'Optional help description' field and an answer input field labeled 'Enter your answer here.'. To the right of the question list is a 'Question settings' panel with tabs for 'Simple' and 'Advanced'. The 'Simple' tab is selected, showing a list of settings: General, Display, Logic, Other, Statistics, and Timer. Below these is a 'Condition designer' section with a '+ New logic' button and an 'Enter expression...' input field. The top of the interface shows the LimeSurvey logo, a '+', the survey title, a 'Saved at 12:55' status, and buttons for 'Reactivate' and 'Upgrade'.





## How LimeSurvey Works

The General tab lets you define the core properties of a question. In the General tab, you can:

The diagram shows the 'General' tab interface with several callouts explaining its features:

- Make the question mandatory or optional for participants:** Points to the 'Mandatory' section with 'On', 'Soft', and 'Off' buttons.
- Change the question type ( Multiple Choice, Text, Numeric):** Points to the 'Type' dropdown menu, which is currently set to 'Short text'.
- Set maximum characters or numeric limits for answers:** Points to the 'Max characters' input field, which is set to '500'.
- Specify how answers are stored for later analysis:** Points to the 'Store answers encrypted' section with 'Yes' and 'No' buttons.

The interface also includes fields for 'Question code' (Q00), 'Numbers only' (On/Off), 'Save as default values' (Yes/No), and 'Input validation' (Enter here).

The Display tab controls how the question appears to participants. In the Display tab, you can:

The diagram shows the 'Display' tab interface with several callouts explaining its features:

- Include images in the question or answers:** Points to the 'Add image' section with a 'Drop image here' area.
- Add text before or after answers (e.g., units):** Points to the 'Answer prefix' and 'Answer suffix' input fields.
- Hide guidance or the whole question if not needed:** Points to the 'Hide tip' and 'Always hide this question' sections, each with 'Yes' and 'No' buttons.
- Apply custom styling to the question:** Points to the 'CSS class(es)' input field.
- Adjust the input field size or type:** Points to the 'Text input box width' (Default) and 'Text input box size' (Enter here) sections.

The interface also includes an 'Add image' section with a 'Drop image here' area.



## How LimeSurvey Works

The Logic tab Set conditions and rules for question behavior. In the Logic tab, you can:

The screenshot shows the 'Logic' tab interface. It includes a 'Randomization group name' field with a callout 'Shuffle questions or groups to reduce bias'. Below it are 'Question validation equation' and 'Question validation tip' fields, both with 'Enter here' text and a callout 'Ensure answers meet certain conditions'. At the bottom, there are 'Other' and 'Statistics' tabs, with a callout 'Show or hide questions based on previous answers' pointing to the 'Other' tab.

The Other tab Advanced options for exporting and custom logic. In the Other tab, you can:

The screenshot shows the 'Other' tab interface. It includes an 'Insert page break in printable view' section with 'Yes' and 'No' buttons. Below it is the 'SPSS export scale type' dropdown menu, which is set to 'Default' and has a callout 'Choose how the question is exported for analysis'. At the bottom, there is a 'Statistics' tab with a callout 'Add custom logic rules if needed' pointing to it.

The Statistics tab Configure how responses are summarized and analyzed. In the Statistics tab, you can:

The screenshot shows the 'Statistics' tab interface. It includes a 'Show in statistics' dropdown menu set to 'Bar chart' with a callout 'Control how answers are summarized'. Below it is a 'Timer' section with a callout 'Adjust scoring or calculation options'. At the bottom, there is a 'Condition designer' section with a '+ New logic' button.



## How LimeSurvey Works

The Timer tab Set time limits and countdown style for the question. In the Timer tab, you can:

The screenshot shows the 'Timer' configuration panel in LimeSurvey. It includes fields for CSS styles, expiry messages, time limits, and warnings. Two callout boxes provide instructions: one points to the 'Time limit' field with the text 'Set the allowed time to answer the question', and another points to the 'Time limit timer CSS style' field with the text 'Customize the countdown display style'.

Timer

Time limit timer CSS style  
Enter here

Expiry message display time  
Enter here

Expiry message  
Enter here

Time limit message CSS style  
Enter here

1st time limit warning  
Yes No

2nd time limit warning  
Yes No

Time limit  
Enter here

Time limit action  
Warn and move on

Time limit disable next  
On Off

Set the allowed time to answer the question

Customize the countdown display style

### ③ Manage Translations

When creating surveys for multilingual participants, LimeSurvey allows you to manage and translate your forms easily. You can define a base language, add additional languages, and edit translations directly within the survey workspace.

The screenshot shows the 'Manage Translations' interface in LimeSurvey. The left sidebar contains a 'Settings' menu with options like 'General', 'Privacy policy', 'Participant settings', 'Publication & access', and 'Notifications & data'. The main panel is titled 'General' and shows a list of languages under 'Survey languages'. 'English' is the base language, and 'Arabic' is selected. Other languages listed include Afrikaans, Albanian, Amharic, Armenian, Azerbaijani, and Basque. Below the language list, there are fields for 'Bounce email address' and 'Group'.

LimeSurvey

Data Collection Toolkit for CSOs

Saved at 05:41

Activate Upgrade

Settings

General

Privacy policy

Participant settings

Publication & access

Notifications & data

General

Survey languages

English

Afrikaans

Albanian

Amharic

Arabic

Armenian

Azerbaijani

Basque

your-email@example.net

Bounce email address

Enter here

Group

Default



## How LimeSurvey Works

This section allows setting the main survey language and adding one or more translation languages. Use this feature to:



Ensure all survey text fields are available for translation



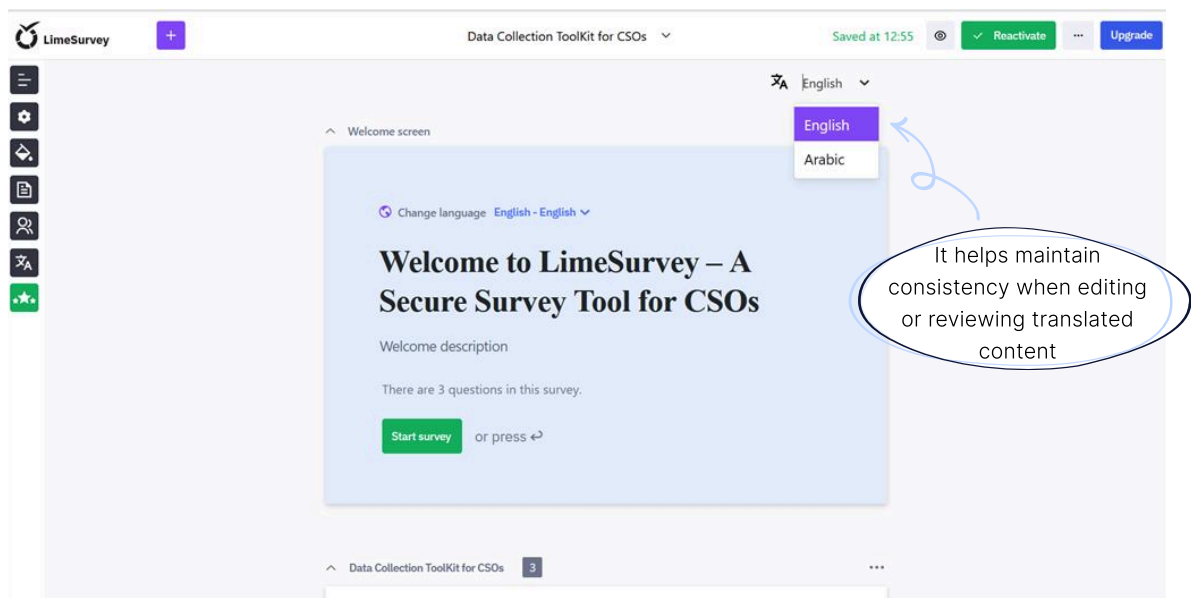
Add additional languages from the list (for example, Arabic or French)



Specify the default language displayed to respondents

This dropdown menu allows switching between language versions directly from the survey workspace. Use it to:

- ✦ Toggle between languages to view or adjust the translated questions.
- ✦ Verify that the text formatting and layout appear correctly in each version

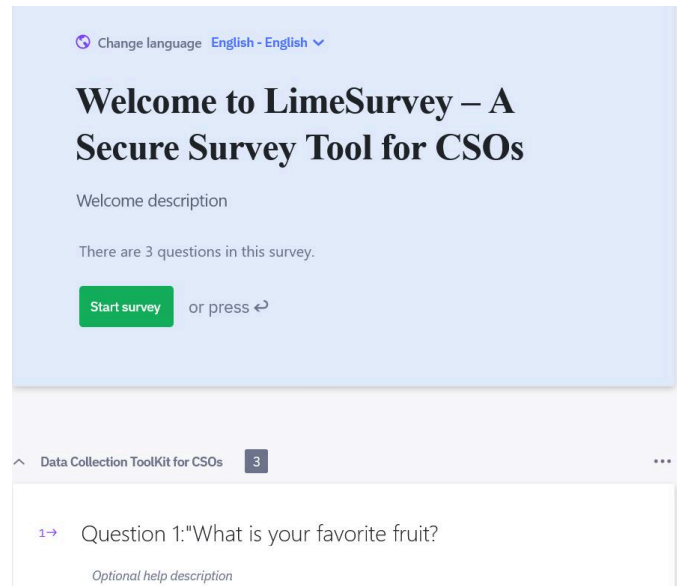




# How LimeSurvey Works



This example shows the survey workspace when Arabic is selected as the active language. All question texts and interface elements appear in Arabic for translation review.



This example shows the same survey when English is selected. The questions and interface elements are displayed in English to match the default survey language.

The Quick Translation interface provides a centralized view for managing all text elements across your survey. This feature allows faster translation of titles, descriptions, and question text without switching screens.



# How LimeSurvey Works

Translate survey

Translate to: Arabic

Survey title and description | Welcome and end text | Question groups | Questions | Subquestions | Answer options

Invitation email subject | Reminder email subject | Confirmation email subject | Registration email subject | Basic admin notification subject

Detailed admin notification subject

Auto Translate

English | Arabic

Data Collection ToolKit for CSOs

دليل أدوات جمع البيانات للمؤسسات المجتمعية

Use this tool to:

- ✦ Select the target language for translation ( Translate to Arabic).
- ✦ Review survey components such as Title and Description, Welcome Text, and question labels.
- ✦ Choose between automatic translation or manual editing for higher accuracy.

## Changing Your LimeSurvey Account Language

Account

X Close Save and close Save

Profile | Personal settings | Personalized menus | Personalized menu entries

My personal settings

Interface language: English - English

HTML editor mode: Default

Preselected question type: Long free text

Date format: dd.mm.yyyy

Non-Numerical subquestions prefix: SQ

Breadcrumb mode: Default

Show script field: Yes No

Lock question organizer in sidebar by default: Yes No

Directly show edit mode: Yes No

Create example question group and question: Yes No Default



# How LimeSurvey Works

To change the interface language in LimeSurvey, go to Personal Settings from your account menu and select your preferred language from the Interface Language dropdown. Save your changes to apply the new language.

## ④ Assign Roles to Your Survey

This section explains how to assign and manage user roles both at the system level and at the survey level in LimeSurvey. Roles define what each user can do, from system administration to survey-specific tasks. Go to Survey Permissions to manage who can access and work on your survey.

### 1 Survey-Level Roles (Internal / Survey Permissions): These roles control access within a specific survey.

#### ✓ Add Users / Assign Roles:

Select system users or groups to assign to the survey.  
Assign a role for each user, Viewer, Editor, Survey Administrator.  
Roles define actions like creating questions, managing participants, exporting data.

Secure Data Collection (784516) / Survey

Tools ... Stop this survey

Settings Structure

Overview

General

Text elements

Privacy policy

Theme options

Presentation

Participant settings

Notifications & data

Publication & access

**Survey permissions**

Survey menu

Overview questions & groups

Participants

Email templates

Edit permissions

|   | Permission   | General           | Create                   | View/<br>read            | Update                   | Delete                   | Import                   | Export                   |
|---|--|-------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| ● | Permission to create, view, update, delete assessments rules for a survey  | Assessments       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ■ | Permission to create, view, update, delete quota rules for a survey  | Quotas            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ■ | Permission to create(data entry), view, update, delete, import, export responses                                   | Responses         | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ■ | Permission to view statistics  | Statistics        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ■ | Permission for survey access. Read permission is a requirement to give any further permission to a survey.         | Survey            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ▶ | Permission to activate, deactivate a survey  | Survey activation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ■ | Permission to create, view, update, delete, import, export the questions, groups, answers & conditions of a survey | Survey content    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Add user

Add group users

Survey Si Action

From here, you can add users, assign roles, or customize detailed permissions



# How LimeSurvey Works

- ✓ Update or Remove Roles
- Modify or remove roles for existing users when responsibilities change.

Secure Data Collection (784516) / Survey permissions

Tools | ...

Stop this survey

Run survey | ...

Export

Settings

Structure

Overview

General

Text elements

Privacy policy

Theme options

Presentation

Participant settings

Notifications & data

Publication & access

Survey permissions

Survey menu

Overview questions & groups

Participants

Email templates

Survey permissions

User:

Please choose...

Add user

User group:

security-officers

Add group users

| Username | User group    | Full name        | Assessments | Participants | Quick translation | Quotas | Responses | Statistics | Survey Si | Action |
|----------|---------------|------------------|-------------|--------------|-------------------|--------|-----------|------------|-----------|--------|
| a.saad   | staff-members | Ahmad Saad       | ✓           | ✓            | ✓                 | ✓      | ✓         | ✓          | ✓         | ...    |
| e.warren | staff-members | Elizabeth Warren | ✓           | ✓            | ✓                 | ✓      | ✓         | ✓          | ✓         | ...    |
| s.ameen  | staff-members | Sara Ameen       | ✓           | ✓            | ✓                 | ✓      | ✓         | ✓          | ✓         | ...    |
| j.clarke | staff-members | John Clarke      | ✓           | ✓            | ✓                 | ✓      | ✓         | ✓          | ✓         | ...    |

Help ▾

Survey | ...

Export

Survey permissions

Delete user survey permissions

Are you sure you want to delete this entry?

Cancel

Delete



# How LimeSurvey Works

2 System-Level Roles (External / Configuration): These roles control access and permissions across the LimeSurvey system.

## ✓ User Management

Add, edit, or deactivate system users

Manage login credentials and user details

## ✓ User Groups

Organize users into groups for easier permission assignment



# How LimeSurvey Works

LimeSurvey

+

Surveys

Help

Configuration

20

0 / 10

User\_Test

Upgrade plan

< User group: Admins

Mail to all members

Edit current user group

Delete current user group

Group members

Group description: Full control of the survey

Username

Email

Actions

No user group members found.

Please choose...

Add user

Groups can later be used in survey-level permissions

LimeSurvey Cloud Version 6.15.23

## ✓ User Roles

LimeSurvey

+

Surveys

Help

Configuration

20

0 / 10

User\_Test

Upgrad

< User roles

Add user role

Import (XML)

Name

Description

Ahmad

This is the A

Selected role(s)...

Create permission role

Name \*

Description \*

Cancel

Create

Create new roles with specific permissions

Created

Action

2025-11-11

...

Displaying 1-1 of 1 results

10

rows



# How LimeSurvey Works

+

Surveys

< User roles

+

Add user role

+

Import (XML)

☐

Name

☐

Ahmad

Selected role(s)...

Edit permissions

|  | Permission                   | All                      | Create                   | View/<br>read            | Update                   | Delete                   | Import                   | Export                   |
|--|------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <div><div></div><div>Permission to create participants in the central participants database (for which all permissions are automatically given) and view, update and delete participants from other users</div></div>  | Central participant database | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <div><div></div><div>Permission to create, view, update, delete, export and import label sets/labels</div></div>   | Label sets                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <div><div></div><div>Permission to view and update global settings &amp; plugins and to delete and import plugins</div><div><div></div><div>This permission allows an admin to change security relevant settings. Please make sure to assign this only to trusted persons.</div></div></div> | Settings & Plugins           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <div><div></div><div>Permission to create survey groups (for which all permissions are automatically given) and view, update and delete survey groups from other users.</div></div>  | Survey groups                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <div><div></div><div>Permission to create surveys</div></div>  | Surveys                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

U

User\_Test

Upgrade plan

Update existing roles to modify access rights

## Central Participant Management

+

Surveys

Help

Configuration

20

0 / 10

U

User\_Test

Upgrade plan

< Central participant management

+

Display CPDB participants

+

Summary

+

Import

+

Blocklist settings

+

Attributes

+

Share panel

+

Export all participants

+

Add participant

☐

Last name

☐

First name

☐

Email address

☐

Language

☐

Active surveys

☐

Owner

☐

Blocklisted

☐

Created on

Action

Manage participants across multiple surveys

Note. This does not assign survey permissions directly

Add, edit, or import participants centrally

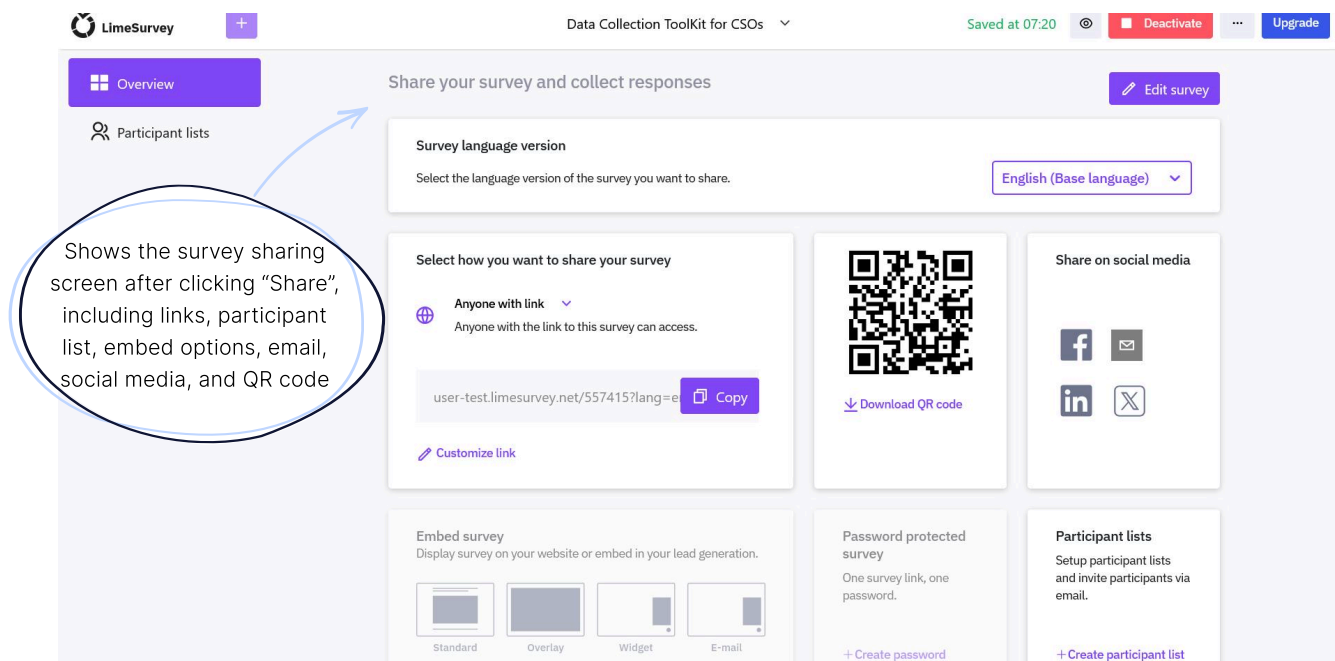
LimeSurvey Cloud Version 6.15.23



# How LimeSurvey Works

## ⑤ Distribute the survey

This section allows CSOs to distribute the survey through multiple channels, choose the survey language, and manage participant lists. The distribution options ensure that the survey reaches the right audience in the most convenient format.



Go to Survey Permissions to manage who can access and work on your survey.

### Key features:

- ✦ Survey Language Version – select which language version to share.
- ✦ Participant List – view and manage participants for targeted distribution.
- ✦ Embed Survey – choose Standard or Overlay, adjust width, and widget options.
- ✦ Email – send invitations directly, customize messages, and preview before sending.



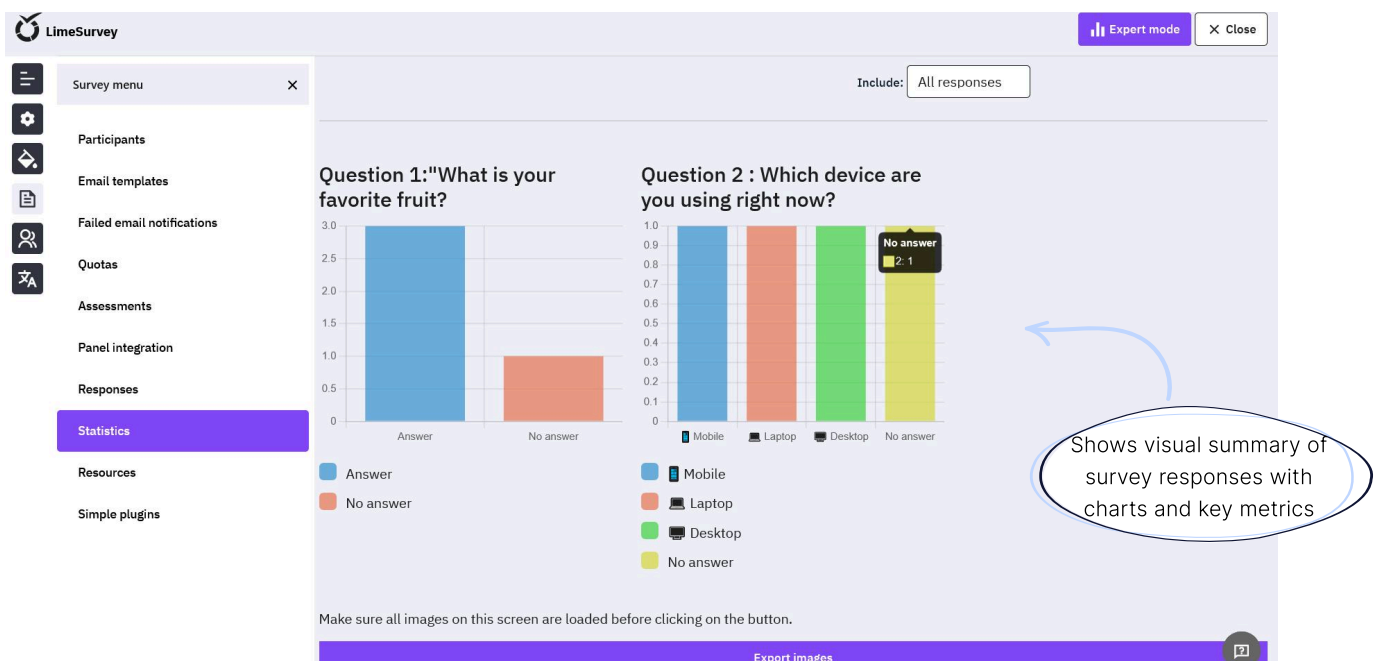
## How LimeSurvey Works

- ✦ Share on Social Media – distribute survey through platforms like Facebook or Twitter.
- ✦ QR Code – quick access for participants via mobile devices.



### ⑥ Collect and Monitor Responses

This section allows CSOs to collect survey responses, monitor them in real-time, and export data for analysis. The interface provides options to view statistics, manage responses, and include or exclude certain submissions, making it easier to track and mentor participants.





# How LimeSurvey Works

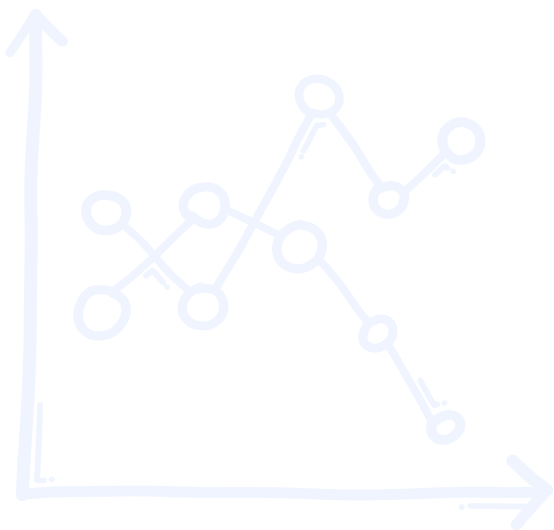
## Key features:

- ✦ Include all responses – choose whether to include incomplete or partial responses.
- ✦ Export images – include charts and graphs in export files.
- ✦ Export mode – select the format for exporting survey data.

The screenshot displays the LimeSurvey 'Statistics' page. The interface includes a sidebar with navigation links: Survey Settings, General, Privacy policy, Participants, Publication & access, and Notifications & data. The main content area is titled 'Statistics' and contains several sections:

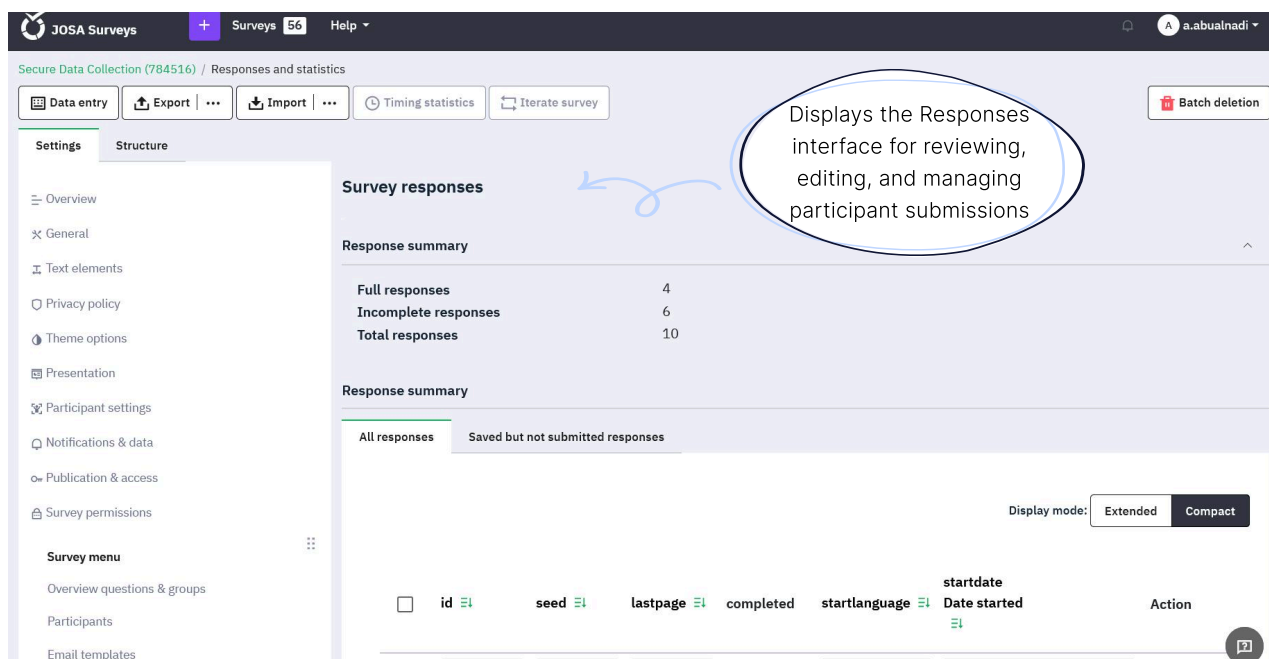
- General filters:** Includes 'Main options' with 'Include' (All responses, Complete only, Incomplete only), 'Output format' (HTML, PDF, Excel), 'View summary of all available fields' (On/Off), 'Show graphs' (On/Off), and 'Statistics report language' (English).
- Output options:** Includes 'Show text responses inline' (On/Off), 'Subtotals based on displayed or answered questions' (Off, Displayed, Answered), 'Number of columns' (One, Two, Three), 'Graph labels' (Question code, Question text, Both), and 'Chart type' (As defined in question settings).

A purple notification box at the bottom right states: 'Each question has its own graph type defined in its advanced settings. Using the chart type selector you can force the graph type for all selected questions. Only for HTML output.'





# How LimeSurvey Works



## Key features:

- ❖ Data entry / Export / Import – manage response records, upload or download data.
- ❖ Timing / Statistics / Rated / Survey – options to filter and analyze responses.
- ❖ Batch actions & Deletion – perform bulk operations on responses.
- ❖ View modes: Compact / Extended – adjust how much information is displayed.
- ❖ Save but not submitted responses – temporarily save incomplete entries.
- ❖ All responses – view every submitted response for the survey.

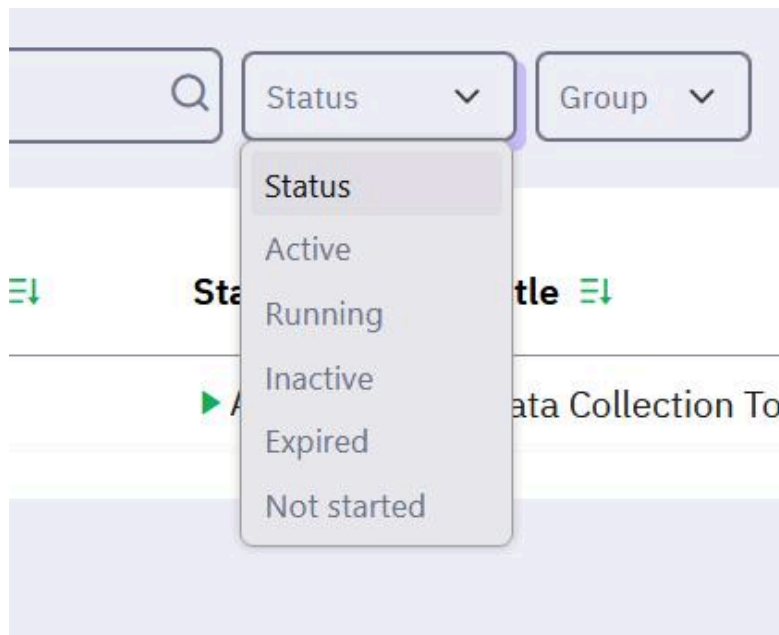
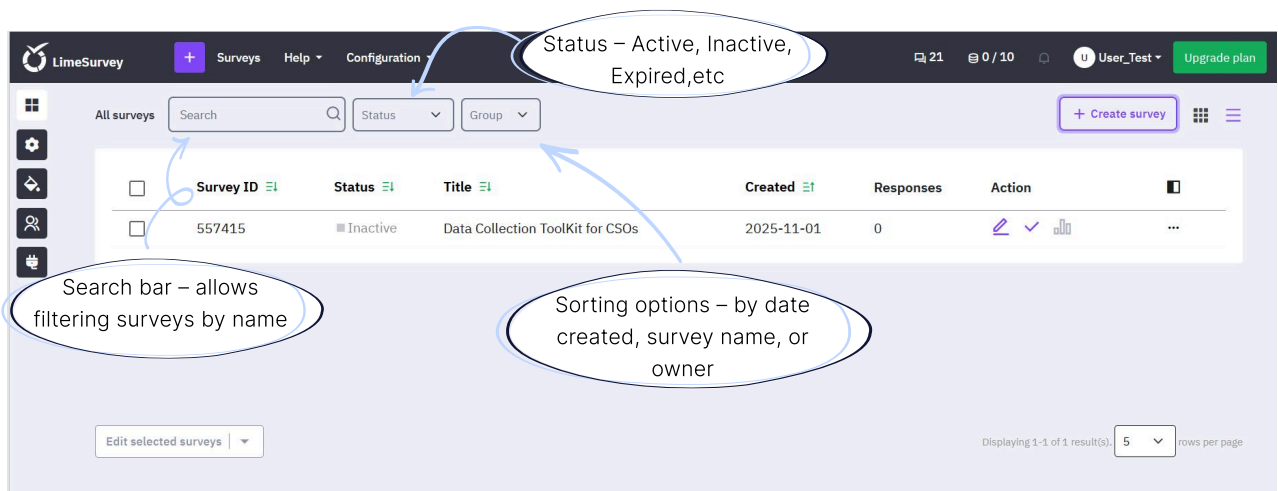


# How LimeSurvey Works

## ⑦ Manage Surveys

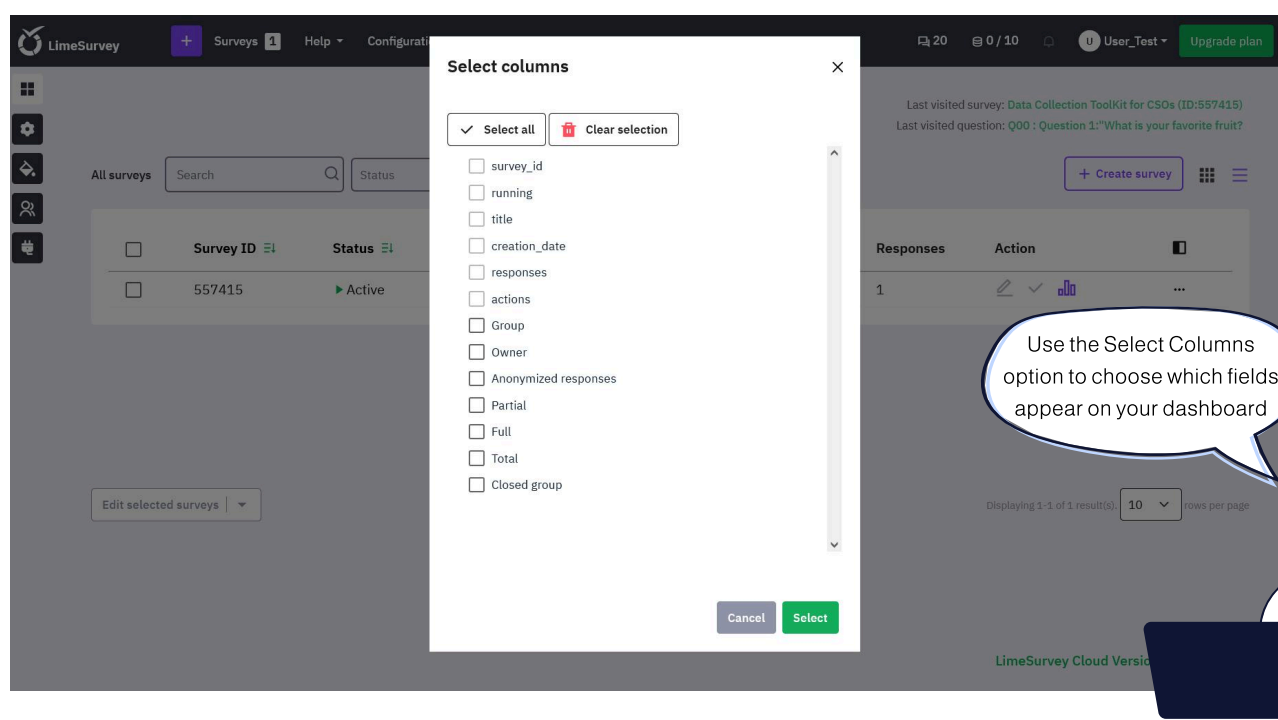
### 1 Survey List Overview:

This screen displays all surveys available in the account. Users can quickly view survey titles, status (Active/Inactive), creation date, owner, and total responses.

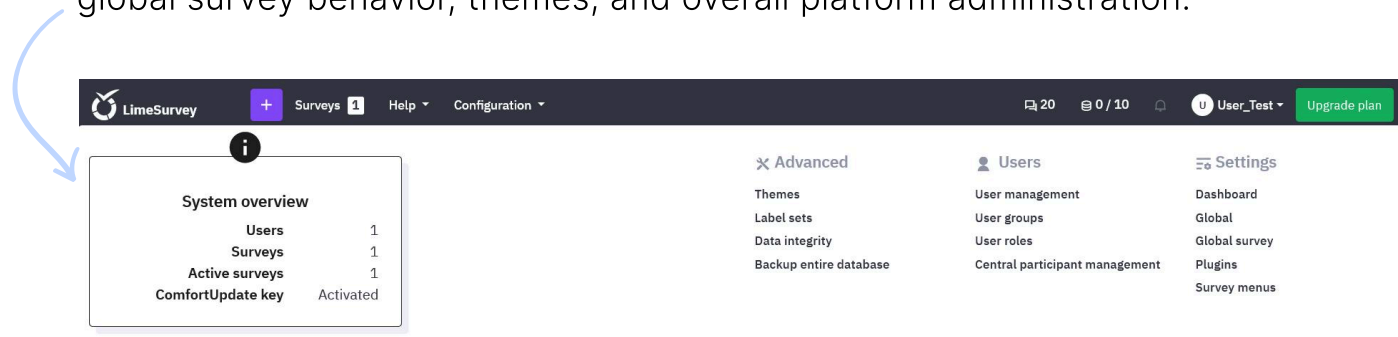




# How LimeSurvey Works



The Configuration panel provides system-level settings for managing users, global survey behavior, themes, and overall platform administration.





# How LimeSurvey Works

## Summary / Overview

Gives a quick snapshot of the system's status, including:

- ✦ Total surveys and active surveys
- ✦ System health and update information
- ✦ Basic environment details

## Users

This area manages who can access LimeSurvey and what permissions they have. Includes:

- ✦ User Management (adding/editing users)
- ✦ User Groups (grouping similar users together)
- ✦ User Roles (creating reusable permission profiles)
- ✦ Central Participant Management (shared participants across surveys)

## Advanced

These are system-wide technical tools for customizing and maintaining LimeSurvey. Useful for:

- ✦ Managing global themes
- ✦ Managing label sets
- ✦ Running data integrity checks
- ✦ Creating system backups

## Settings

These are global settings that apply to the entire LimeSurvey installation. Includes:

- ✦ Dashboard settings (what shows on the home screen)
- ✦ Global settings (languages, security defaults, admin email, platform name)
- ✦ Global survey settings (default behavior for all new surveys)
- ✦ Plugins (activating and configuring extensions)
- ✦ Survey Menus (customizing the left-hand menu inside surveys)

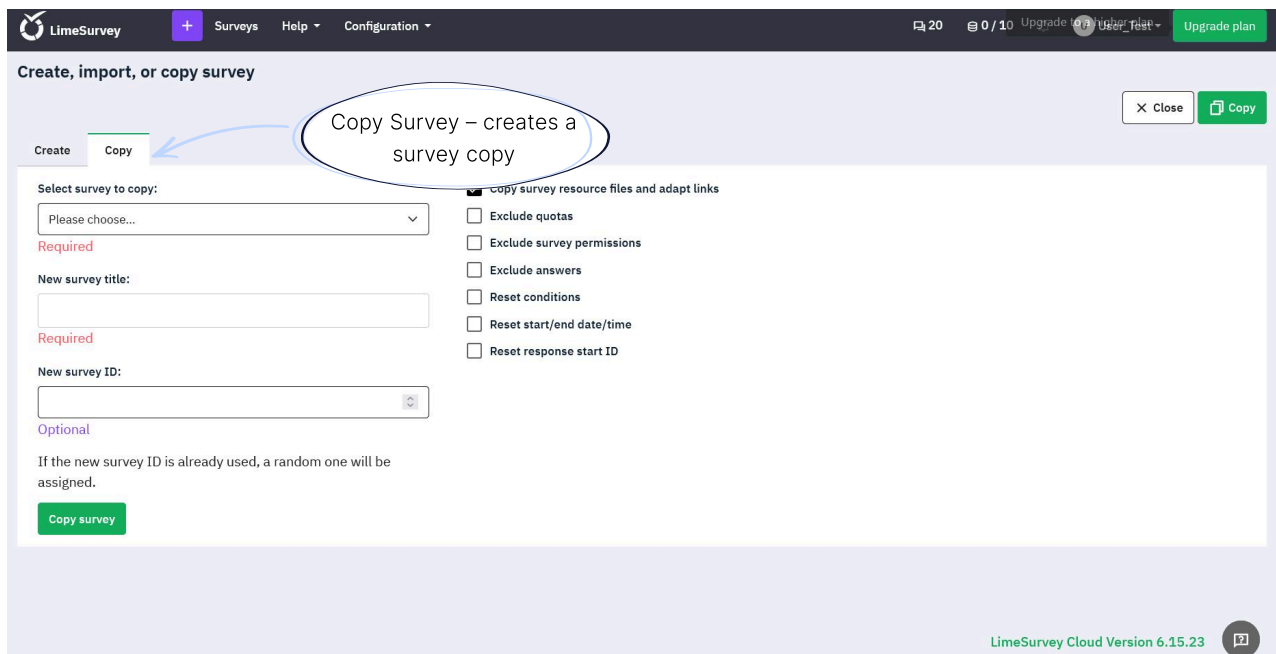
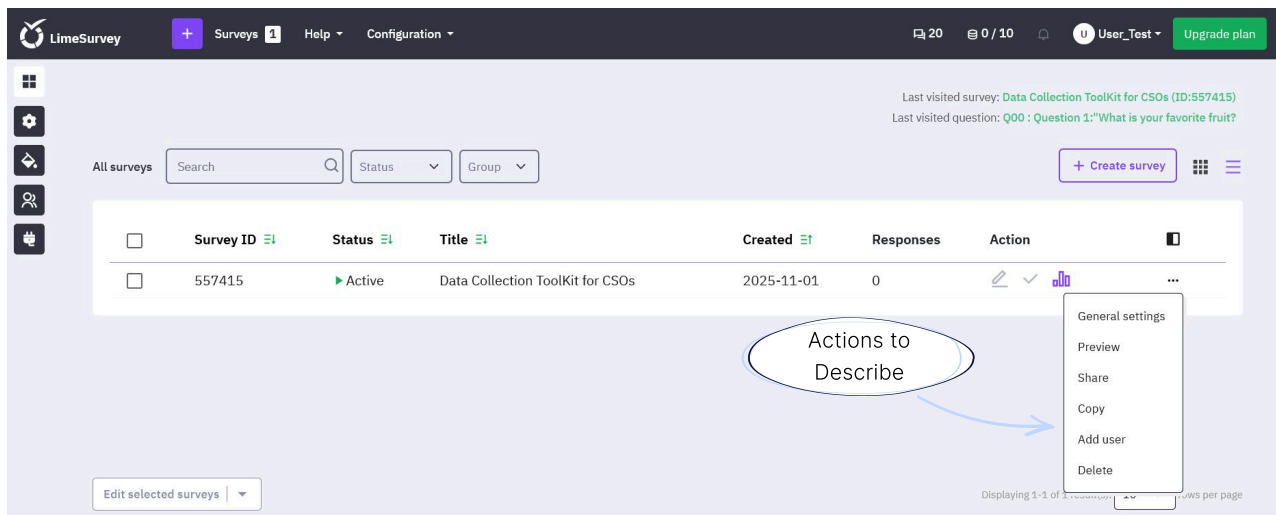




# How LimeSurvey Works

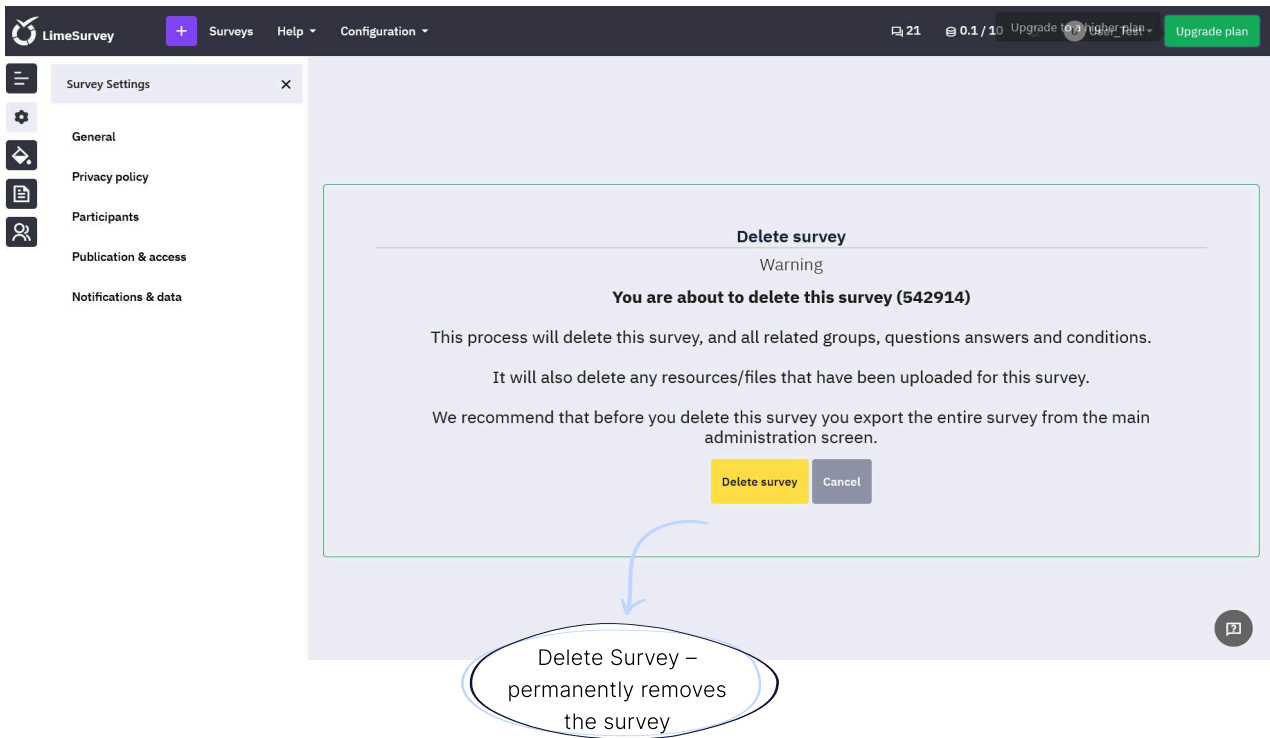
## 2 Survey Actions:

Each survey in the list has an action menu represented by three dots. This menu allows users to perform key survey-level actions without entering the survey workspace.



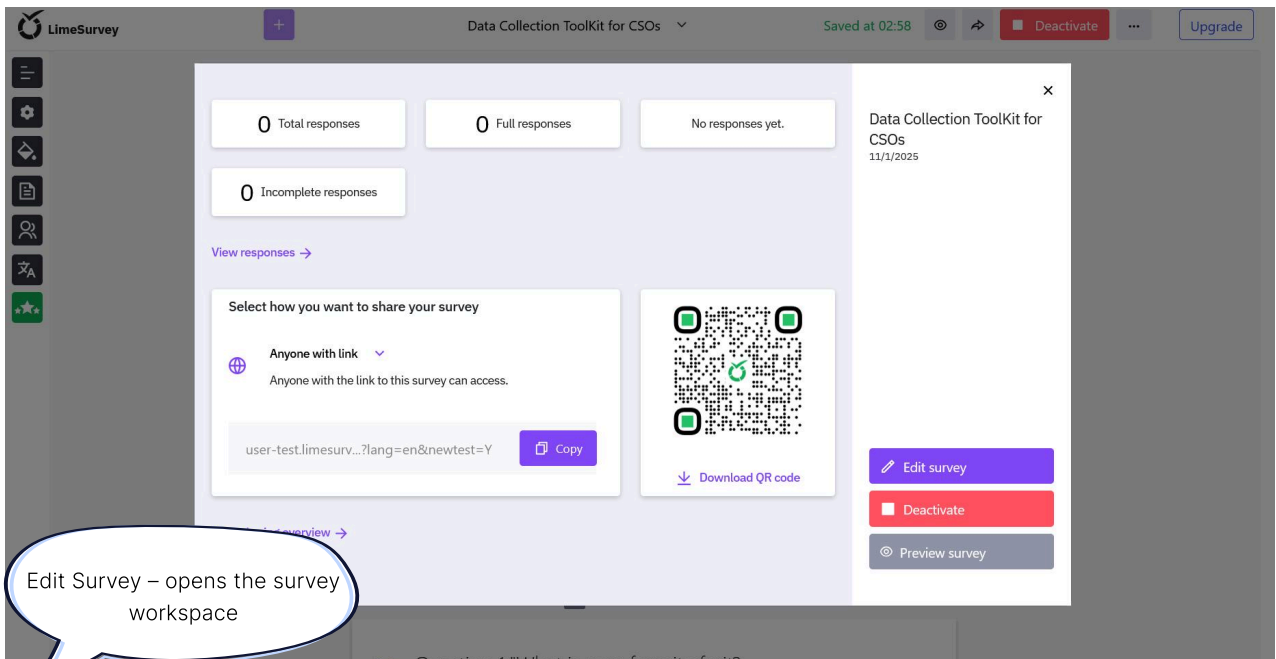


# How LimeSurvey Works



The screenshot shows the LimeSurvey interface with a 'Delete survey' warning dialog box. The dialog has a title 'Delete survey' and a subtitle 'Warning'. The main text reads: 'You are about to delete this survey (542914). This process will delete this survey, and all related groups, questions answers and conditions. It will also delete any resources/files that have been uploaded for this survey. We recommend that before you delete this survey you export the entire survey from the main administration screen.' At the bottom of the dialog are two buttons: 'Delete survey' (yellow) and 'Cancel' (grey). A blue arrow points from the 'Delete survey' button to a speech bubble that says 'Delete Survey – permanently removes the survey'.

**Delete Survey – permanently removes the survey**

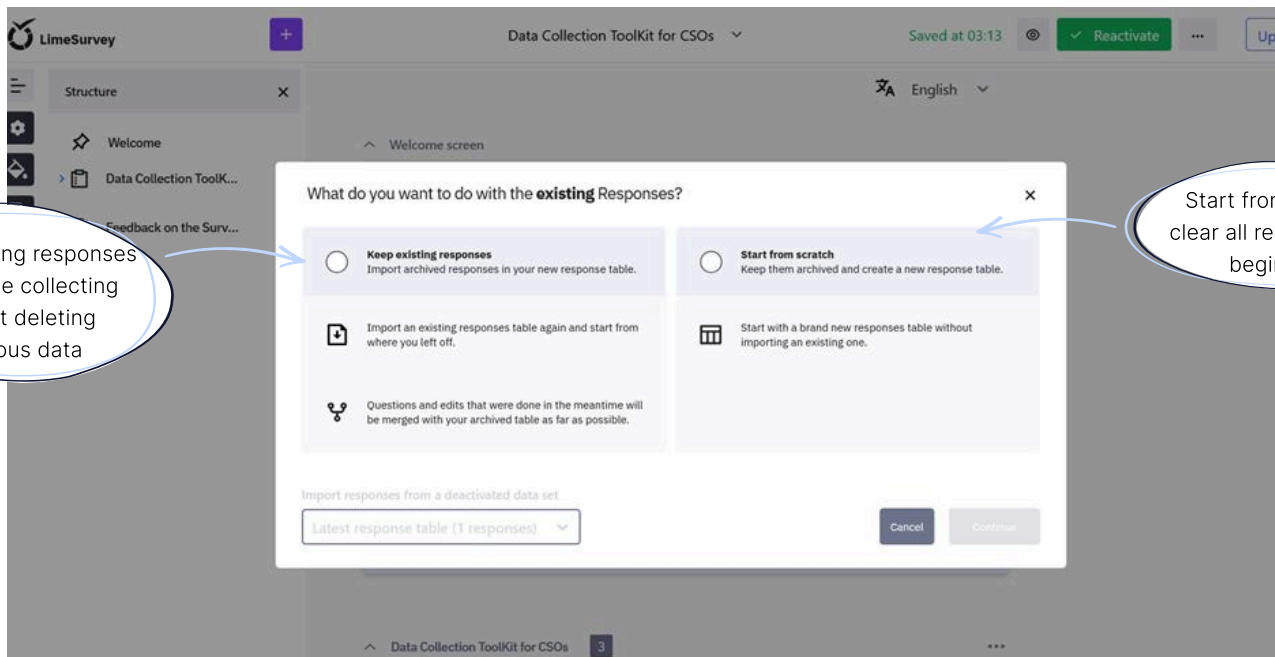


The screenshot shows the LimeSurvey 'Edit survey' workspace. The main area displays statistics: '0 Total responses', '0 Full responses', 'No responses yet.', and '0 Incomplete responses'. Below these is a 'View responses' link. A section titled 'Select how you want to share your survey' shows 'Anyone with link' selected, with a note 'Anyone with the link to this survey can access.' and a URL 'user-test.limesurv...?lang=en&newtest=Y' with a 'Copy' button. To the right is a QR code with a 'Download QR code' link. On the far right is a sidebar with buttons: 'Edit survey' (purple), 'Deactivate' (red), and 'Preview survey' (grey). A speech bubble from a cartoon character at the bottom left says 'Edit Survey – opens the survey workspace'.

**Edit Survey – opens the survey workspace**



# How LimeSurvey Works





# How LimeSurvey Works

Export Survey Structure – downloads survey file (.lss).

Note: Exporting your survey also works as a backup

All export options shown in the screenshots including Survey Structure (.lss), Survey Archive (.lsa), and Responses (.csv / .xlsx) can be used as a backup. These files allow you to restore your survey or move it to another LimeSurvey instance if needed.

Last visited survey: Data Collection ToolKit for CSOs (ID:557415)  
Last visited question: Q00 : Question 1:"What is your favorite fruit?"

All surveys

Search

Status

Group

+ Create survey

Export as...

Survey archive (\*.lsa)

Survey structure (\*.lss)

Printable survey (\*.html)

Edit selected surveys

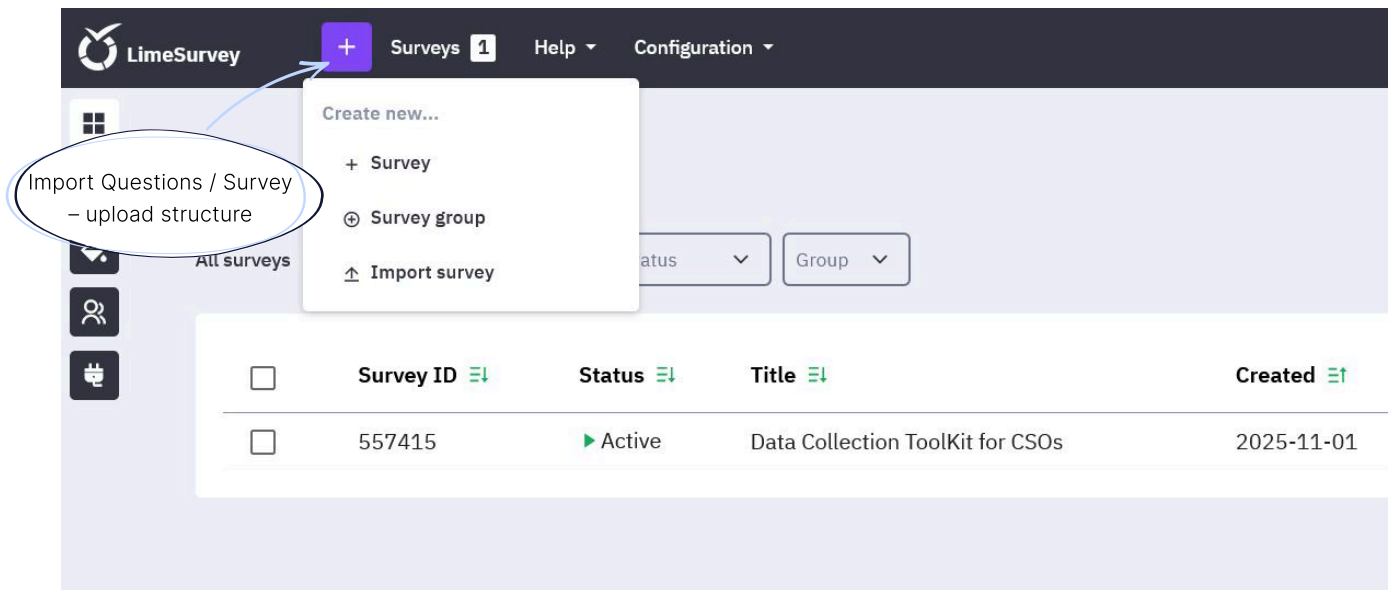
| Status | Title                            | Created    | Responses | Action |
|--------|----------------------------------|------------|-----------|--------|
| Active | Data Collection ToolKit for CSOs | 2025-11-01 | 1         |        |

Displaying 1-1 of 1 result(s)

10 rows per page



# How LimeSurvey Works



## 3 Survey Status Management:

This section explains the different status labels and what they mean for survey workflow.



### Active:

Survey link is open for responses.  
Question structure becomes locked.



### Inactive:

Survey link is closed.  
Structure can be edited again.



### Expired (if applicable):

Survey automatically closes after the set expiration date.



## How LimeSurvey Works

### ⑧ Analyze and Export Data

LimeSurvey provides an overview of survey responses and basic statistics. For deeper analysis:

