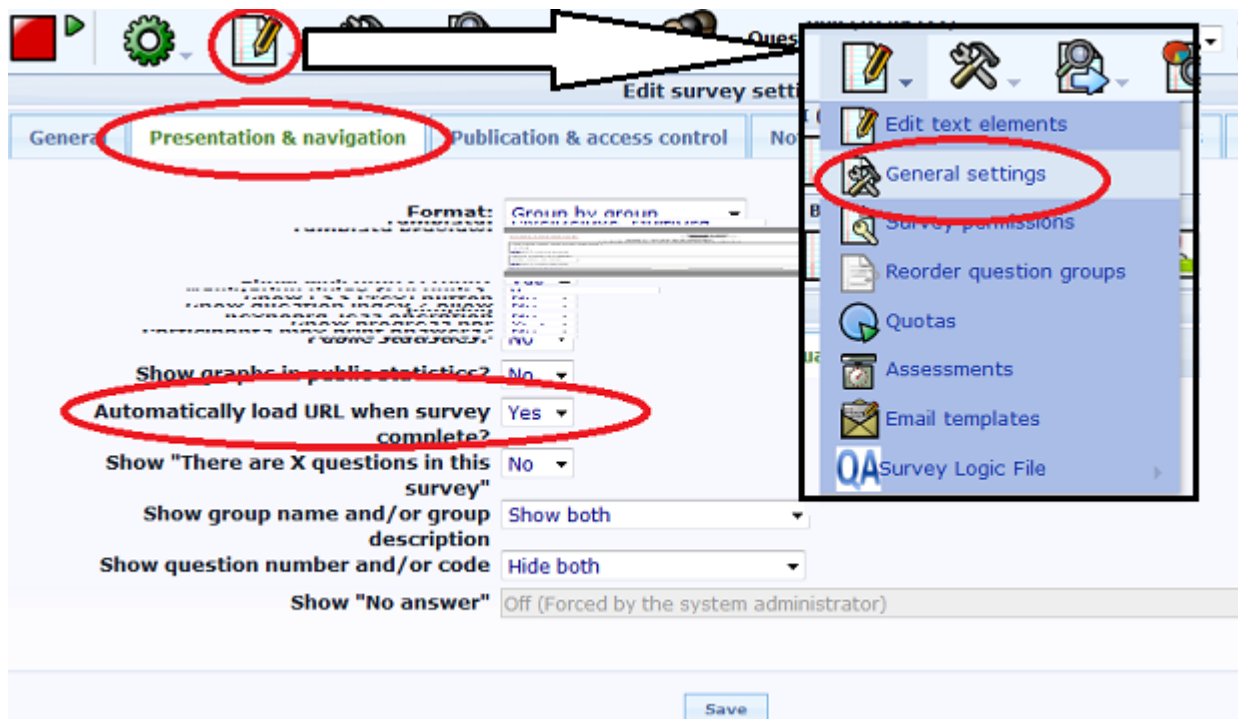


Loading questionnaires into GemsTracker

To use a survey created in a survey source like LimeSurvey, you will first have to prepare the survey in the source system. Certain settings must be set in Lime Survey before GemsTracker can actually track the survey and in LimeSurvey you should activate the survey and create a token table.

When the survey is ready in the source, you must synchronize the source in GemsTracker. After synchronization the survey is ready for activation in GemsTracker itself as GemsTracker needs to know who is supposed to answer the survey.



Preparing the survey in LimeSurvey

Gems can only link individual survey answers to respondents when the survey setup allows this.

LimeSurvey survey settings

Select a survey

Select a survey and then click on the red encircled icon and then click on 'General settings' in the drop down menu.

Set Url loading

Next click on the 'Presentation & navigation' tab and make sure that 'Automatically load URL when survey complete?' at the bottom of the page is set to 'Yes'. This makes sure the user returns to

GemsTracker after completing the survey. The actual URL to return to us set by GemsTracker automatically.



The screenshot shows the 'Edit survey settings' interface with the 'Notification & data management' tab selected. The 'Date stamp?' dropdown menu is set to 'Yes'. Other visible options include 'Send basic admin notification', 'Send detailed admin notification', 'Save IP address?', and 'Save reference URL?'. The 'Notification & data management' tab is circled in red.

Set the date stamp

Click on the 'Notification & data management' tab. Make sure the 'Date stamp' field is set to 'Yes'.

GemsTracker needs this field to track when the survey was answered and how much time the user needed to answer the survey.



The screenshot shows the 'Edit survey settings' interface with the 'Tokens' tab selected. The 'Anonymized responses?' dropdown is set to 'No', 'Allow editing answers after completion?' is set to 'Yes', and 'Enable token-based response persistence?' is set to 'Yes'. The 'Save' button is circled in red.

Token settings

Click on the 'Tokens' tab. Set:

- 'Anonymized responses?' to 'No'
- 'Allow editing answers after completion?' to 'Yes'
- 'Enable token-based response persistence?' to 'Yes'

As GemsTracker is a tool to track survey answers about the same person the surveys cannot be anonymous. The other settings are needed e.g. to allow users to reuse question answers from an earlier version of the same survey or to preset the answers depending on who is answering the survey.

Finish by clicking on 'Save'.

LimeSurvey survey activation

Once a survey is as good as ready to use, you need to activate the survey in LimeSurvey. For this you click on the small arrow next to the large red square.

Activate survey (71683)

Warning
READ THIS CAREFULLY BEFORE PROCEEDING

You should only activate a survey when you are absolutely certain that your survey setup is finished and will not need changing.

Once a survey is activated you can no longer:

- Add or delete groups
- Add or delete questions
- Add or delete subquestions or change their codes

However you can still:

- Edit your questions code/title/text and advanced options
- Edit your group names or descriptions
- Add, remove or edit answer options
- Change survey name or description

Once data has been entered into this survey, if you want to add or remove groups or questions, you will need to deactivate this survey, which will move all data that has already been entered into a separate archived table.

Activate survey

After survey activation you can no longer:

- Add or delete questions (but you can hide them)
- Add or delete question groups (but you can hide them)
- Change question types
- Add sub questions or change their codes

However, it is still possible to:

- Change question codes / titles / text, i.e. the texts shown to the user
- Change group names and description
- Add, remove or edit answer options
- Change survey name or description

When you are ready click on the 'Activate survey' button in the screen telling you the above.

You can deactivate a survey after activation, but then you will lose any existing answers to that survey. A better solution is to make a copy of the survey and change that copy, using e.g. a version number in the name of the survey to distinguish between the versions.

Activate survey (71683)

Survey has been activated. Results table has been successfully created.

This survey is now active, and responses can be recorded.

Open-access mode: No invitation code is needed to complete the survey. You can switch to the closed-access mode by initialising a token table with the button below.

Switch to closed-access mode No, thanks.

Token control test

A token table has been created for this survey. ("time__tokens_71683")

Continue

LimeSurvey Version 1.92+ Build 120517

Next the question is asked to switch to closed-access mode. This is required as GemsTracker has to take control concerning who answers which survey when. Click on 'Switch to closed-access mode'.

Next LimeSurvey tells you it has created a token table to contain the tokens. This table will contain the tokens created by GemsTracker.

After clicking on 'Continue' you enter the Token management screen. However there is nothing here to do for you. GemsTracker takes care of filling the token table and any extra token fields needed by GemsTracker to store additional information will be created during the synchronization with GemsTracker.



Synchronizing the source in GemsTracker

- Go to 'Track builder' in the navigation bar on the left
- Under 'Track builder' go to 'Synchronize all surveys '
- Press 'Start 1 Job'
- Wait till the synchronization is finished
- Go to 'Surveys' in the navigation bar on the left
- Search for each survey you've added and follow the next steps for each of them
 - Press Edit for the right survey
 - Tick the box 'Active in #' (where # is the name of your project)
 - Change the group (Patient, Researchers or Staff)
 - Press 'Save'

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