

Dr. Fendrich's guide to using phpESP to creating online surveys

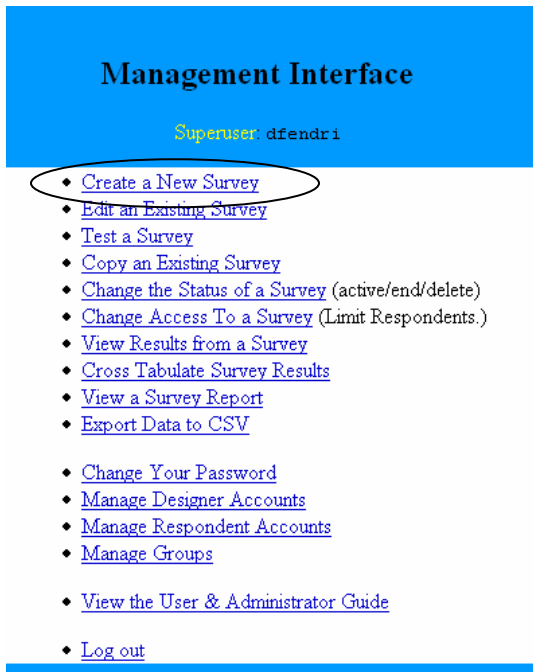
phpESP is a tool for creating online surveys. You can create surveys that collect responses, including fixed rating scales and open-ended questions, and the results that can be downloaded and imported into Excel or SPSS. Working with phpESP is done over the internet and your surveys are saved online automatically.

Getting started

First, you must have an account setup for you. If your instructor has not created one for you then contact Dr. Fendrich at dwfendrich@widener.edu to request an account. After your account is created you can design and administer surveys by going to the following link to log into phpESP.

www.dfendrich.com/surveys.htm

Log in to survey construction with your username and password. You will see the following screen. Here you can control all aspects of your survey. Click on **Create a New Survey** to begin.



The screen below allows you to name your survey. In this example I named the survey **happy_df**. All of the surveys created for the class must have different names. Thus, you should use the underscore key followed by your initials to make it unique. Write the name of your survey down, you will need it later. You need to fill in a couple of other boxes on this screen. There should only be one option for the **Owner** box based on your course. A title that appears on the survey must be entered; I used **Happiness Survey**. Finally, you should enter a URL (web address) for the **Confirmation Page**. The confirmation page is where people will be sent when they complete the survey. You should use this one: <http://www.dfendrich.com/thankyou.htm> Using this link will present a message that says "You're done! Thank you for completing this survey" at the end of your survey.

The information on this tab applies to the whole survey. Fill out this page then go to the **Fields** tab to edit individual fields.

Name *Required*
Survey filename. This is used for all further access to this survey. (no spaces, alpha-numeric only)

Owner joe / *Required*
User and Group that owns this survey.

Title *Required*
Title of this survey. This appears at the top of every page of this survey. (free-form, including spaces)

Subtitle
Subtitle of this survey. Appears below the title. (free-form, including spaces)

Additional Info
Text to be displayed on this survey before any fields. (i.e. instructions, background info, etc.)

Confirmation Page (URL)
The URL to which a user is redirected after completing this survey.
OR

Editing Surveys

Now you can click on the **Questions** tab to begin creating your survey. This is the screen where you will do most of your work. First you should create an item for instructions and a consent statement. Enter a name for the first question in the **Field Name** box. Here I called it **consent**. This is also the name of the variable that will appear in the final data file.

Survey Design

Help

General Questions Order Preview Finish

Edit this question, or click the number of the question you would like to edit:

Question Name	Type	Length	Precision	Required?
consent	Section Text	0	0	No

Text
This survey is being conducted by YOUR NAMES HERE at Widener University.
General Information about the Research Study

Enter the possible answers (if applicable). Enter !other on an line by itself to create a fill-in-the-blank answer at the end of this question. Any blank lines will be supported.

1.

This must be set to "No" for section text.

Next, chose an option from the **type** box: the type of question format your want. For instructions or a consent statement you should choose **Section Text**. The will present text but it will not require a response. For section text you must change **Required?** to **no** since it is not possible for people to provide an answer to instructions. In the text box you should enter the instructions you want to appear on the first page of the survey. Check with your instructor for appropriate consent information. You can always write this text in a word processor and then paste it into the **text** box. After you have entered the text, click on the **Order** tab.

phpESP

Notice: Only variable references should be returned by reference in /home/dfendric/public_html/phpesp/admin/include/lib/adodb/adodb.inc.php

Survey Design

[Help](#)

General Questions **Order** Preview Finish

Change the order that questions are presented by selecting a question from the list, then use the up/down buttons to change its position.

1. This survey is being conducted by YOUR NAMES HERE at Widener University. General Information about...
 --- Section Break ---

Up | Down | **Add Section Break** | Remove

Click cancel to cancel this survey, or click continue to proceed to the next tab.

Cancel | Continue >

The **Order** screen allows you to change the order of your questions and add section breaks. Section breaks divide your survey into pages. Inserting a section break after a question will add a button that says “Next Page” that must be clicked to show the following questions. Your instruction/consent statement should go on a page by itself so add a section break after the consent statement. Now your survey will be set up so that participants will give their consent to complete the survey by clicking on the “Next Page” button to show the actual questions.

As you add more questions you can add more section breaks if you like or use the **Up** and **Down** buttons to change the order of the questions. You can always switch between the **Questions** and **Order** tabs when designing your survey.

Now let’s make our first real question. Click on the **Questions** tab and then click on **New Question**. To make a multiple choice question choose the **Radio Buttons** option from the **Type** menu. Next, change the **Required?** box to **Yes** to force people to answer the question. In general, you should require participants to answer all questions unless there is a specific reason to allow them to leave it blank. In the **Text** box you should enter your question. I entered the question “What color makes you happy?” Below that you should enter on each line the different possible answers they can choose from. Use the responses shown in the example below. Do not worry about extra blank lines. Notice in this example I used a special keyword called **!other** to allow a fill-in-the-blank response for answers I did not list. This is optional.

General **Questions** Order Preview Finish

Edit this field, or click the number of the field you would like to edit:

New Field

Field Name	Type	Length	Precision	Required?
color	Radio Buttons	0	0	Yes

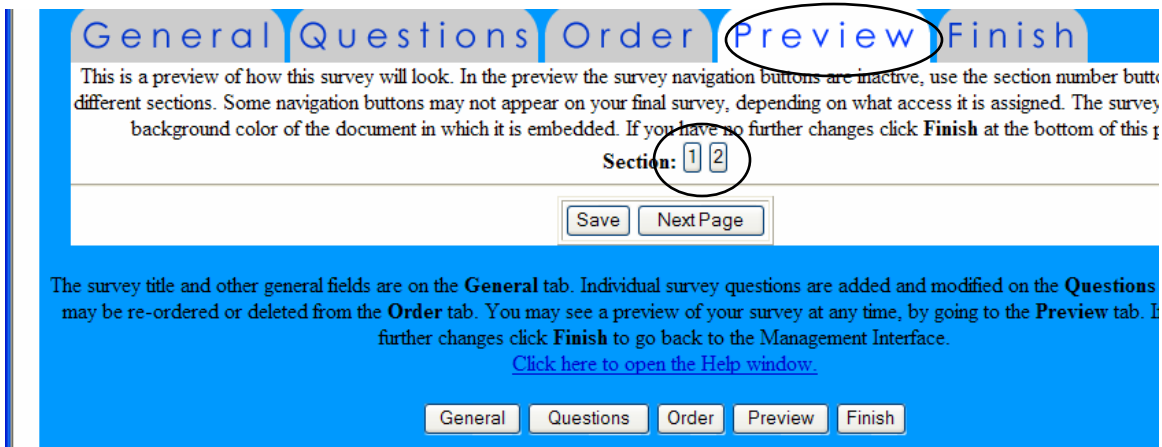
Text: What color makes you happy?

Enter the possible answers (if applicable). Enter !other on an line by itself to create a fill-in-the-blank answer at the end of this question. Any blank lines will be suppressed.

1. red
2. blue
3. green
4. yellow
5. !other
- 6.
- 7.

Preview your survey

You can click on the **Preview** tab at any time to see what your survey looks like. Actually it will look a little different when it is finished but the Preview will give a good approximation. In Preview your survey will be divided into the sections you created. Click on a section number to see the questions in it.



General Questions Order **Preview** Finish

This is a preview of how this survey will look. In the preview the survey navigation buttons are inactive, use the section number buttons to view different sections. Some navigation buttons may not appear on your final survey, depending on what access it is assigned. The survey will use the background color of the document in which it is embedded. If you have no further changes click **Finish** at the bottom of this page.

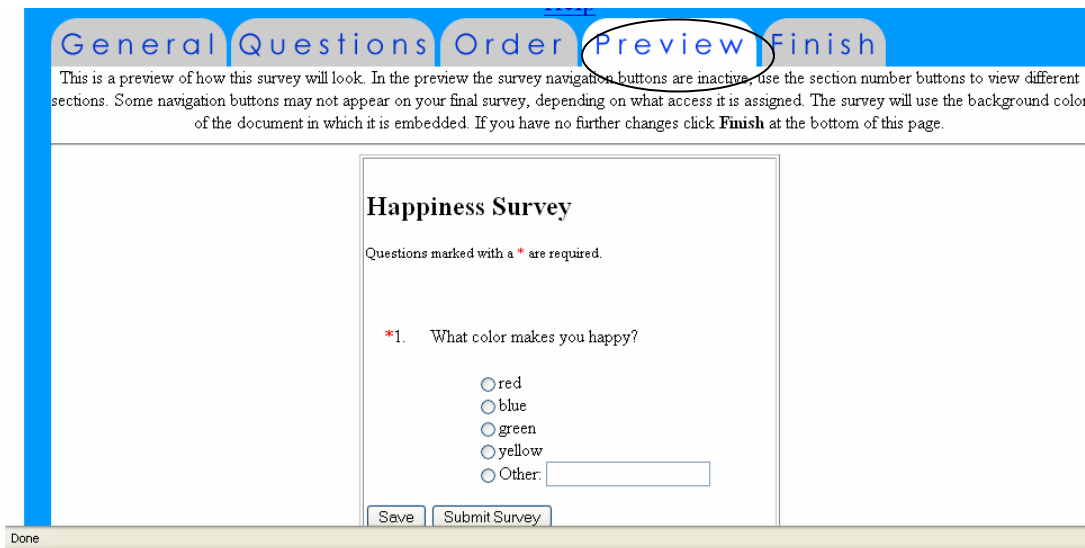
Section: 1 2

Save Next Page

The survey title and other general fields are on the **General** tab. Individual survey questions are added and modified on the **Questions** tab. You may see a preview of your survey at any time, by going to the **Preview** tab. If you have no further changes click **Finish** to go back to the Management Interface.

[Click here to open the Help window.](#)

General Questions Order **Preview** Finish



General Questions Order **Preview** Finish

This is a preview of how this survey will look. In the preview the survey navigation buttons are inactive, use the section number buttons to view different sections. Some navigation buttons may not appear on your final survey, depending on what access it is assigned. The survey will use the background color of the document in which it is embedded. If you have no further changes click **Finish** at the bottom of this page.

Happiness Survey

Questions marked with a * are required.

*1. What color makes you happy?

red
 blue
 green
 yellow
 Other:

Save Submit Survey

Done

Let's add another question now. Go back to the **Questions** tab and click on **New Question**. Now change the **Type** to **Text Box**. This will let you create an open-ended question where people will type in an answer to your question. A **Text box** will give you a small box for a short answer. If you want to give people a larger box for a longer answer, use the **Essay Box type**. Enter the question "What food makes you happy?" Nothing needs to be added as possible answers in the numbered boxes for a **Text Box** question.

The screenshot shows the 'New Field' configuration window in the phpESP Survey Design tool. The 'Type' dropdown menu is set to 'Text Box' and is circled in red. The 'Field Name' is 'food', 'Length' is 0, 'Precision' is 0, and 'Required?' is 'Yes'. The question text is 'What food makes you happy?'. Below the configuration, there are two empty input boxes for possible answers.

Field Name	Type	Length	Precision	Required?
food	Text Box	0	0	Yes

Text: What food makes you happy?

Enter the possible answers (if applicable). Enter !other on an line by itself to create a fill-in-the-blank answer at the end of this question. Any blank lines will be suppressed.

-
-

Let's try rating scale questions now. Suppose you have number of questions you want participants to agree or disagree with using a rating scale. Create a new question and choose the **Rate** option from the **Type** box. Call the **Question Name** ACTIVITIES. This type of question is set up a little differently than the others. You will actually create several questions in one. In the text box you should type the instructions for the scale items not the question (see below). In the numbered boxes you enter the **items (questions)** not the answers. phpESP will create the answers for you (see below).

The screenshot shows the 'Question 3' configuration window in the phpESP Survey Design tool. The 'Type' dropdown menu is set to 'Rate (scale 1..5)' and is circled in red. The 'Question Name' is 'ACTIVITIES', 'Length' is 5, 'Precision' is 0, and 'Required?' is 'Yes'. The question text is 'Respond to the following items with the a scale of 1 to 5 where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, and 5=strongly agree'. Below the configuration, there are three input boxes for possible answers: 'Music makes me happy', 'Swimming makes me happy', and 'Being with friends makes me happy'. There are also buttons for 'Add another answer line' and 'Clear all answer lines'.

Question Name	Type	Length	Precision	Required?
ACTIVITIES	Rate (scale 1..5)	5	0	Yes

Text: Respond to the following items with the a scale of 1 to 5 where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, and 5=strongly agree

Enter the possible answers (if applicable). Enter !other on an line by itself to create a fill-in-the-blank answer at the end of this question. Any blank lines will be suppressed.

- Music makes me happy
- Swimming makes me happy
- Being with friends makes me happy

Add another answer line Clear all answer lines

Below is what the rating scale items will look like in **Preview**. If you want a different number of possible answers change the number in the **Length** box. Remember to put good instruction that explain the different numbered responses into the **Text** box or the items will not make sense.

*2. Respond to the following items with the a scale of 1 to 5 where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, and 5=strongly agree

	1	2	3	4	5
Music makes me happy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Swimming makes me happy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Being with friends makes me happy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Testing the Survey

Once you think your survey is complete and correct you should test it. Click on the **Finish** tab and then click on **Management Interface**.

The screenshot shows a navigation bar with tabs: General, Questions, Order, Preview, and Finish. The 'Finish' tab is highlighted and circled. Below the tabs, the text reads 'Survey Design Completed' and provides instructions on how to insert the survey into a web page, including a code snippet and a URL. A link 'Go back to Management Interface' is also circled at the bottom.

This part is confusing so pay attention. Click on **Change the Status of a Survey** not **Test a Survey**. You need to change the status of the survey from editing to testing before you can test it. You can not edit and test at the same time.

Management Interface

Superuser: dfendri

- [Create a New Survey](#)
- [Edit an Existing Survey](#)
- [Test a Survey](#)
- [Copy an Existing Survey](#)
- [Change the Status of a Survey \(active/end/delete\)](#)
- [Change Access To a Survey \(Limit Respondents.\)](#)
- [View Results from a Survey](#)
- [Cross Tabulate Survey Results](#)
- [View a Survey Report](#)
- [Export Data to CSV](#)

- [Change Your Password](#)
- [Manage Designer Accounts](#)
- [Manage Respondent Accounts](#)
- [Manage Groups](#)

- [View the User & Administrator Guide](#)

- [Log out](#)

Notice on the next screen that the current status of the survey is **Editing**. To test your survey you should click on the **Test** link. This will switch the status of the survey from **Editing** to **Test**.

Survey Status

- **Test** transitions a survey into testing mode. At which point you may perform a live test by taking the survey, and viewing the results. You will not be able to make any further changes to the survey once you have switched to test mode.
- **Activate** transitions a survey into active mode. In this mode the survey is open for production use, and may be put online. This will clear any results from testing mode (if any). No further editing of survey is allowed.
- **End** transitions a survey into ended mode. In this mode, no edits are possible, no users may take the survey (it is inactive), but results are still viewable from the results menu.
- **Archive** removes this survey. It is still stored in the database, but no further interaction is allowed. You may **not** view the results of an archived survey.

[Go back to Management Interface](#)

ID	Name	Title	Owner	Group	Status
26	happy_df	Happiness Survey	joe	class	Editing Test

[Go back to Management Interface](#)

Notice how on the following screen the Status of the **Happy** survey is now **Testing**. At this screen you can always click on **Testing** or **Edit** to switch back and forth between these two modes. This is important to remember because you can not edit and test at the same time.

- **Archive** removes this survey. It is still stored in the database, but no further interaction is allowed. You may **not** view the results of an archived survey.

[Go back to Management Interface](#)

ID	Name	Title	Owner	Group	Status
26	happy_df	Happiness Survey	joe	class	Testing Edit

[Go back to Management Interface](#)

Once the status is **Testing** you can test the survey. You will need to go back to the **Management Interface** page and click on **Test a Survey**, as shown below.

Management Interface

Superuser: dfendri

- [Create a New Survey](#)
- [Edit an Existing Survey](#)
- [Test a Survey](#)
- [Copy an Existing Survey](#)
- [Change the Status of a Survey](#) (active/end/delete)
- [Change Access To a Survey](#) (Limit Respondents.)
- [View Results from a Survey](#)
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- [Manage Designer Accounts](#)
- [Manage Respondent Accounts](#)
- [Manage Groups](#)
- [View the User & Administrator Guide](#)
- [Log out](#)

Your survey should be shown like below. Now you can click on **Test**.

Test a Survey

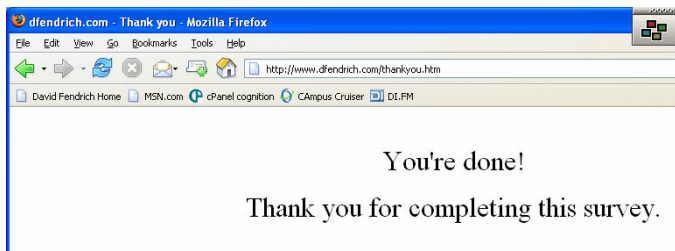
Pick Survey to Test

ID	Name	Title	Owner	Group	Export
15	Happy	Happiness Survey	dfendri	auto	Test Results CSV (download)

[Go back to Management Interface](#)

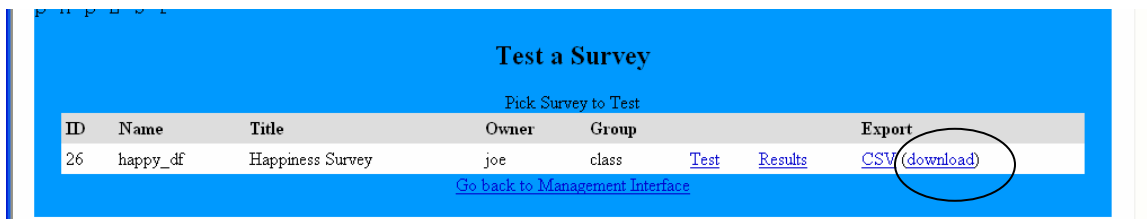
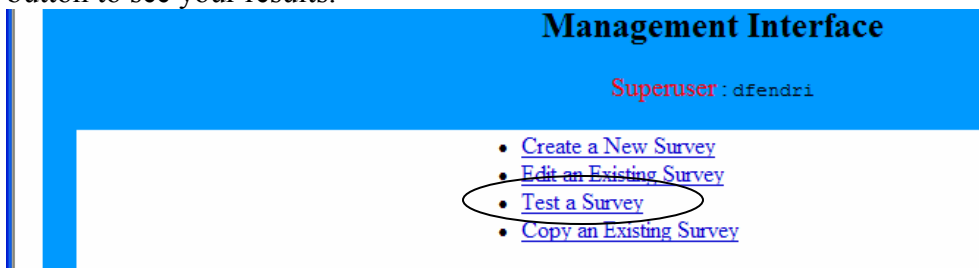
After you click test your survey should appear as it will in the final version. Answer the questions and click on the final **Submit Survey** button.

After you click on the **Submit Survey** button you should see the confirmation screen below.

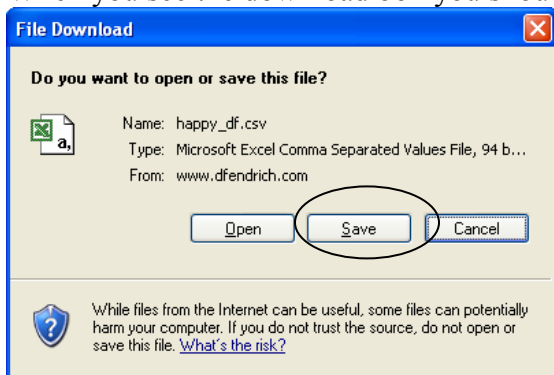


Viewing the results of a Survey

After you test a survey you it will save the answers you provided. You should check the answers too as they will be set up the same as the final data file. Go back to the **Management Interface** screen (you may be able to do this with the back button) and then to the **Test a Survey** page. Here you should click on the **download** button to see your results.



When you see the download box you should **save** the file to your disk.



Now you should open the data file with Excel.

Here is an example of what data file should look like in Excel. The RESPONSE column provides ID numbers for your surveys. The SUBMITTED column gives the date and time when the survey was completed. The USERNAME column indicates who administered the survey. The next columns are the responses to the questions in the survey. Each question will have its own column and the column names will correspond to the question names you created in your survey. There is only one line of data in this example but if, for example, 20 people complete your survey you would have 20 lines of data.

	A	B	C	D	E	F
1	RESPONSE	SUBMITTED	USERNAME	FOOD	COLOR	
2	29	2.00506E+13	dfendri	ice cream	red	
3						
4						
5						
6						

If your survey looked correct when you tested it and the data file looks proper you are ready to activate the survey. If you need to make changes you should go back to **Management Interface, Change the Status of a Survey**, changed the status back to **Editing**, and then **Edit an Existing Survey**. Then make the changes and test the survey again. Having fun yet?

Activating a Survey

Here is another confusing part so pay attention. Even though your survey is finished you must perform another step to activate it so that others can use it. Activating a survey allows others to complete your survey via a web address. Warning - once you activate a survey you can not edited anymore. (Actually, after you activate it you can still make a copy and edit the copy but you will need to choose a new name for it. See **Copying a Survey** below for how to do this.) To activate your survey click on **Change the Status of a Survey** and then click **Activate**.

Survey Status

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- **Activate** transitions a survey into active mode. In this mode the survey is open for production use, and may be put online. This will clear any results from testing mode (if any). No further editing of survey is allowed.
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- **Archive** removes this survey. It is still stored in the database, but no further interaction is allowed. You may **not** view the results of an archived survey.

[Go back to Management Interface](#)

ID	Name	Title	Owner	Group	Status			
2	happy_df	happy	dfendri	auto	Editing	Test	Activate	Archive
1	junk	junk	tester	auto	Active			End Archive

[Go back to Management Interface](#)

Once you have activated your survey you or anyone else can access it through the following link, which can also be found on the survey web page.

<http://www.dfendrich.com/phpesp/public/survey.php?name=add your survey name here>

Remember to add the name of the survey to the end of the link after the = sign. The easiest way to do this is to use the link provided on my survey web page (dfendrich.com/surveys.htm). Go to this page and click on the

link shown above. After you get an error add the name of your survey after the = sign and you should be taken to your survey.

Email invitations for your survey

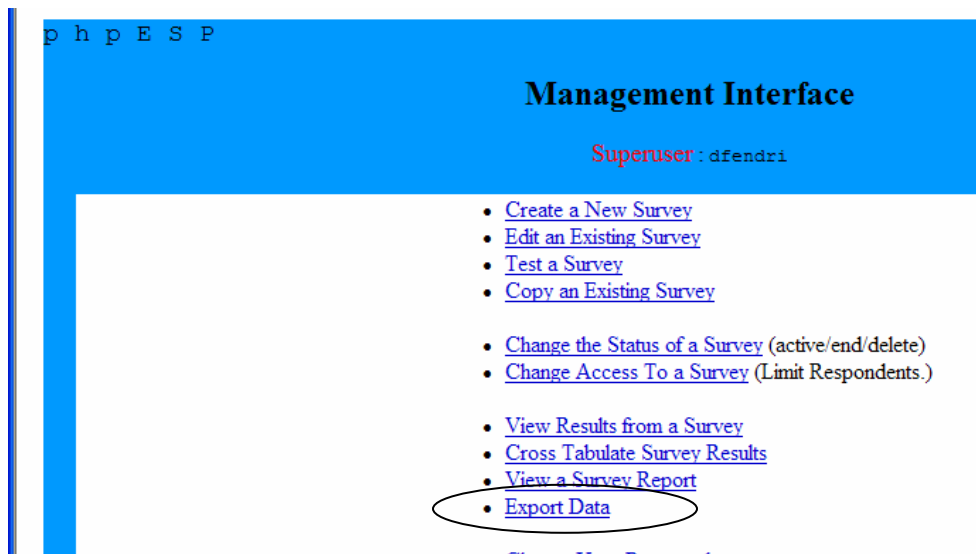
The easiest way to invite people to complete your survey is to email them a link to it. Here is how you do it. Go to dfendrich.com/surveys.htm and access your survey with the following link

<http://www.dfendrich.com/phpesp/public/survey.php?name=add your survey name here>

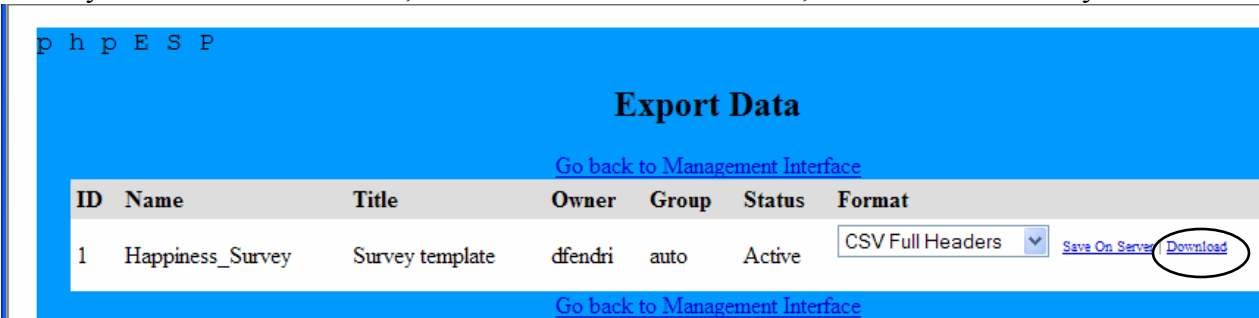
Now copy this link and open up your email program. Test it first by sending it to yourself. Create an email message to yourself and paste the link into the body of the message. Send the message, open it and see if there is a link you can click on to go right to the survey. Make sure the email message has a clickable link, no one wants to cut and paste it. If it works you are now ready to send email invitations of your survey to others. When you send email to others make sure to write an actual invitation, don't just send people a link. "Please" and "thank you" are nice touches and will encourage people to take the time to complete your survey. Please remember not to spam people with your survey. Your instructor should give you guidance here.

Downloading the results of an activated survey

After a survey has been activated and you have invited others to complete it, the results of each response will be added to a data file that you can download at any time. To access the results of your survey click on the **Export Data** link on the **Management Interface** screen.



When you see the screen below, click on the **download** button, save the data file on your disk.

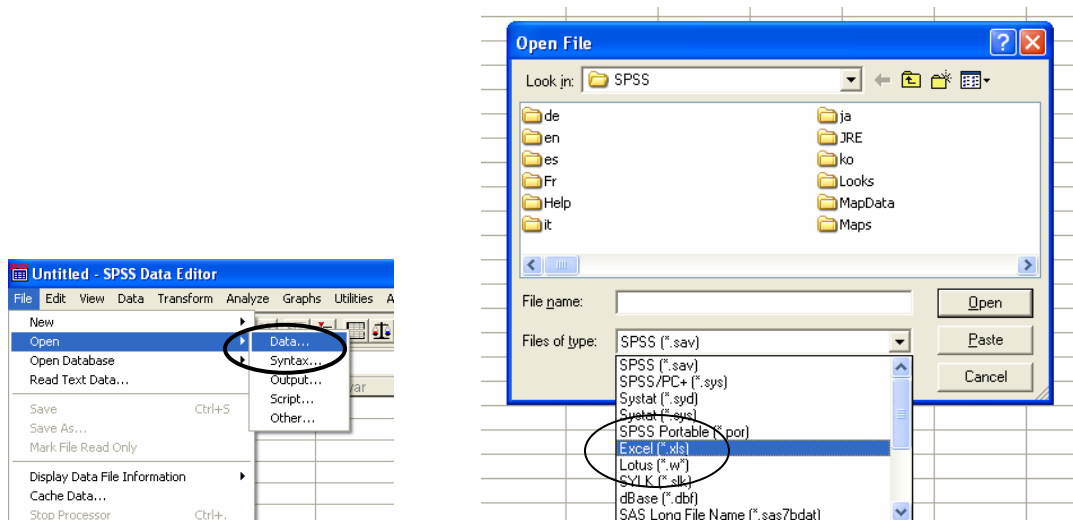


Opening your data file with SPSS

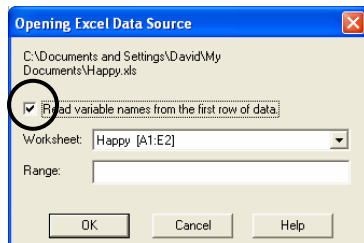
When you are ready to perform statistics on your survey data you will probably want to use SPSS. It is strongly recommend that you first open the downloaded data file with Excel and save it as an Excel file before using SPSS. SPSS will not read your raw, downloaded file properly.

After you have exported your data from phpESP onto your disk you should find the file and double click on it. It should open in Excel. If you do not see your file when you try to open it from within Excel, change the **Files of Type** box to **All Files** to show your data file. The data file from phpESP is a CSV (comma, space, value) file not an actual Excel workbook. Once Excel has opened the file you should use **Save As...** to save it as an Excel workbook, which SPSS can read.

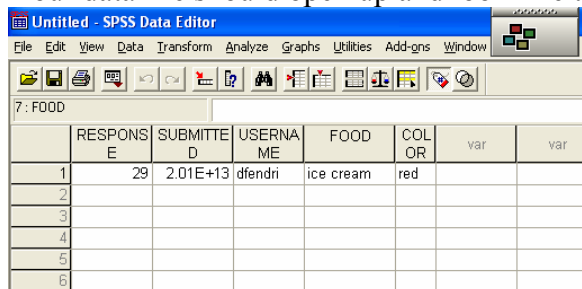
Now close Excel, start SPSS and go to the **Open Data...** command. Change **Files of type** to **Excel**. Locate your data file and open it.



You should see the following box. Make sure you have the **Read variable names** box checked and click **OK**.



Your data file should open up and look like the following screen.



You can now use SPSS to compute statistics and create charts based on your survey data.

Ending a survey

When you are finished collecting data with your online survey you should end it to prevent anyone else from completing it. Warning – once you end a survey you can not collect more data with it unless you make a copy of it. To end your survey click on **Change the Status of a Survey** and then click **End**.

phpeSP

Survey Status

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[Go back to Management Interface](#)

ID	Name	Title	Owner	Group	Status			
2	happy_df	happy	dfendri	auto	Editing	Test	Activate	Archive
1	junk	junk	tester	auto	Active		End	Archive

[Go back to Management Interface](#)

Copying a Survey

This is what you need to do if you want to edit a survey after you have activated or ended it.

Click on the **Copy an Existing Survey** link.

Management Interface

Superuser: dfendri

- [Create a New Survey](#)
- [Edit an Existing Survey](#)
- [Test a Survey](#)
- [Copy an Existing Survey](#)
- [Change the Status of a Survey](#) (active/end/delete)
- [Change Access To a Survey](#) (Limit Respondents.)

Here is the screen you will see. Now just click on the name of your survey and it will make a copy of itself. It will have the same name but with **_copy** after it (e.g., **Happy_df_copy**). You can now go to the edit screen and make changes to the copy and give it a new name. Note – you can change the survey name when you edit it but you will not be allowed to use an old name.

Copy Survey

Choose a survey of which to make a copy. The copy will have the same status of a newly created survey. You will be able to edit the survey, and will have to activate it before use.

ID	Name	Title	Status	Owner	Group
26	happy_df	Happiness Survey	Ended	joe	class

[Go back to Management Interface](#)

That's it. Happy surveying!