

Expertise.
Software.
Solutions.



RTG Survey

User manual

Date: February 9, 2018
Version: 1.5

RTG Portale GmbH
Karl-Zahn-Straße 11
44141 Dortmund
Germany

Tel: +49(0) 231-226186-60
Fax: +49(0) 231-226186-69

E-Mail: info@rtg-portale.de

1. Table of Contents

1. TABLE OF CONTENTS	1
2. INTRODUCTION	2
3. FIRST STEPS	3
3.1. CONFIGURING PERMISSIONS FOR SURVEY ADMINISTRATION	3
3.2. CONFIGURING PERMISSIONS FOR SURVEY PARTICIPATION	3
4. MANAGING SURVEYS	4
4.1. SURVEY TYPES.....	4
4.2. CREATING A NEW SURVEY	4
4.3. QUESTION TYPES	6
4.4. ADDING THE SURVEY QUESTIONS.....	6
4.5. EDITING QUESTIONS	8
4.6. SURVEY TRANSLATION	8
4.7. MIGRATING EXISTING LIFERAY POLLS	9
5. VIEWING SURVEY RESULTS	9
5.1. GETTING AN OVERVIEW.....	9
5.2. VIEWING DETAILED INFORMATION.....	10
5.3. EXPORTING SURVEY RESULTS	11
6. PUBLISHING SURVEYS	13
6.1. PUTTING YOUR SURVEY ON A PORTAL PAGE.....	13
6.2. NOTES ON SURVEY PARTICIPATION	15
7. USING LIFERAY SOCIAL ACTIVITY	15
7.1. DISPLAYING USER'S SURVEY PARTICIPATION	15
7.2. AWARDING PARTICIPATION AND CONTRIBUTION POINTS	15
8. TROUBLESHOOTING	16

2. Introduction

Product survey

User Satisfaction

Questions concerning your satisfaction with our product.

How satisfied are you with our product?

Please rate on a scale of 0 (not satisfied at all) to 6 (extremely satisfied).

0 1 2 3 4 5 6

Which words would you use to describe the product?

High quality

Reliable

Useful

Overpriced

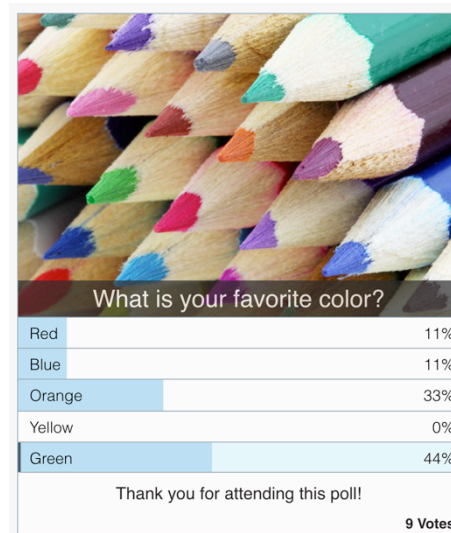
Poor quality

Other

Did you use any similar products before?

Yes

No



RTG Survey consists of three portlets that enable you to create, perform and analyze surveys inside your Liferay Portal. Whether you are looking for opinions of your registered portal users or need to perform a public survey, RTG Survey is just what you need.

The key features of RTG Survey include:

- Easy to use survey editor
- Create simple polls or large surveys
- Sort and group questions via drag & drop
- Detailed monitoring of results
- Quick overview of text based answers as word cloud
- Configurable color schemes
- Surveys based on Liferay's permission system
- Polls based on Liferay Polls
- Support for Application Display Templates to display surveys and polls
- Liferay Social Activity integration
- Available in English, German, French, Russian and Bulgarian (Bulgarian translation provided by INTEPRO, French translation provided by Sollan France)
- Available for Liferay 6.2+ and 7.0+ (including DXP)

3. First Steps

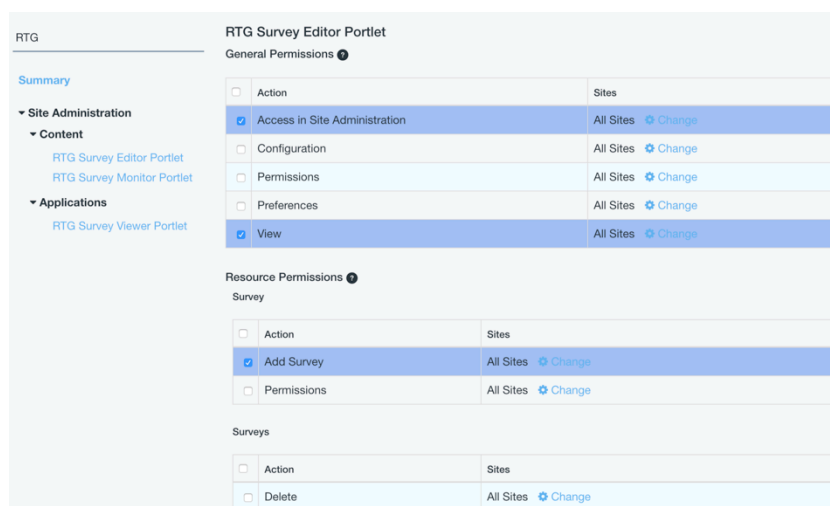
Before you can start to work with this product, there are a few simple steps to configure it. Mainly this concerns configuring permissions for survey creators and participants.

3.1. Configuring permissions for survey administration

RTG Survey uses Liferay’s permission system, which makes the configuration steps easy. First of all, you should make sure to allow survey editing for the appropriate role(s) in your portal. You can locate the necessary permissions by searching for “RTG Survey” and choosing “RTG Survey Editor Portlet”.

At minimum survey creators should be able to view this portlet in the control panel and to add new surveys like displayed below. In addition they need permission to edit and optionally to delete surveys. All permissions can also be modified for single surveys later from within the editor portlet.

Roles that should be able to view survey results need similar view permissions for the “RTG Survey Monitor Portlet”.



3.2. Configuring permissions for survey participation

By default every portal user and even guest users are able to participate in surveys, if they have access to the portal page you choose for the surveys. If you need to change this, you can do so by changing permissions for “RTG Survey Viewer Portlet”. You can also change view permissions later for a single survey.

4. Managing Surveys

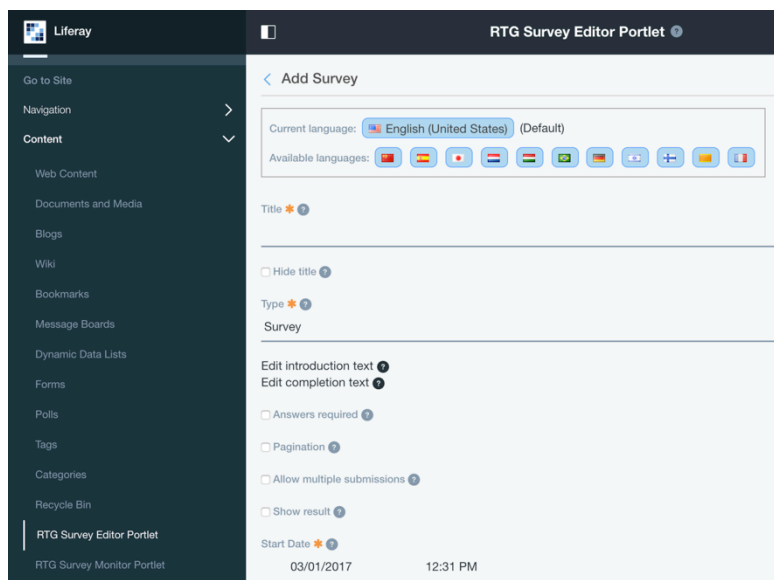
Creating, editing and deleting surveys is what the “RTG Survey Editor Portlet” is used for. You can find it in the site administration “content” area, where you also create web content and similar assets. As usual, surveys are only available within the site they were created for, while surveys of the “global” site can be used anywhere.

4.1. Survey types

RTG Survey supports two types of surveys: simple polls with only one multiple choice question and full surveys with as many questions and categories as you need. Polls are based on Liferay’s own poll portlets, but can be edited, answered and monitored within our portlets just like surveys.

4.2. Creating a new survey

Users with the corresponding permission are able to use the “Add survey” button in the survey editor. The survey creation form is displayed below.



The only mandatory fields in this form are the survey name, which is displayed as headline when the survey is rendered (unless you select “Hide title”), and the start date. Survey participation is only possible between the configured start and optional end date. The type field allows to switch between survey and poll creation as described above.

The survey's introduction and completion texts can be edited by clicking the corresponding label. The introduction text is rendered just below the survey name and can be used to tell your participants what the survey is about or any other information you want them to know. The completion text is used on the new page that loads after the survey is submitted. Use it to thank the participants and share any further information they might need. Both texts use a WYSIWYG editor.

The “Answers required” checkbox, which is only available for surveys, allows you to prevent survey submission, if a user did not answer every question. If this option is enabled, a message is displayed next to any missing questions as the user tries to submit the form. Since registered users are able to update their answers at a later time, it might be a good idea to allow missing answers and let them do the survey in parts. The same applies for guest users as long as their session stays active. As an alternative, you can also flag any specific question as required as shown in section 4.4 below.











The “Pagination” checkbox, again only available for surveys, makes your survey appear on multiple pages. Every question group you create gets rendered as a separate page and participants are able to navigate through them one by one.

Selecting the “Allow multiple answers” checkbox enables users to answer the same survey multiple times. If this option is not activated and a user opens an already answered survey again, he will be able to update his answers.

Finally, there is a “show results” checkbox. If this option is activated, survey or poll participants are able to see the current results after they have answered the question. For surveys this will only show the results of multiple choice, Yes/No, scale, and matrix questions.

4.3. Question types

RTG Survey currently offers the following question types.

Question Type	Description
 Question Group	They can be used to visually group several questions and allow you to display an introduction text for a group of connected questions.
 Free Text	Participants are able to answer by entering a text.
 Multiple Choice	Participants can choose one or multiple answers and are optionally allowed to answer with a text.
 Yes/No	Multiple choice question with only a yes and no answer.
 Scale	Participants are able to rate on a scale that you define.
 Matrix	Two or more questions with the same choices.
 Date	Participants can answer by entering a date or by selecting a date from a calendar.
 File Upload	Participants are able to upload a file as answer to this question.
 E-Mail	Text field that only allows participants to enter a valid mail address.
 Rating	Participants can give a rating between 1 and a defined maximum value. Ratings are given by clicking on a configurable icon (thumbs up, stars, or hearts).

4.4. Adding the survey questions

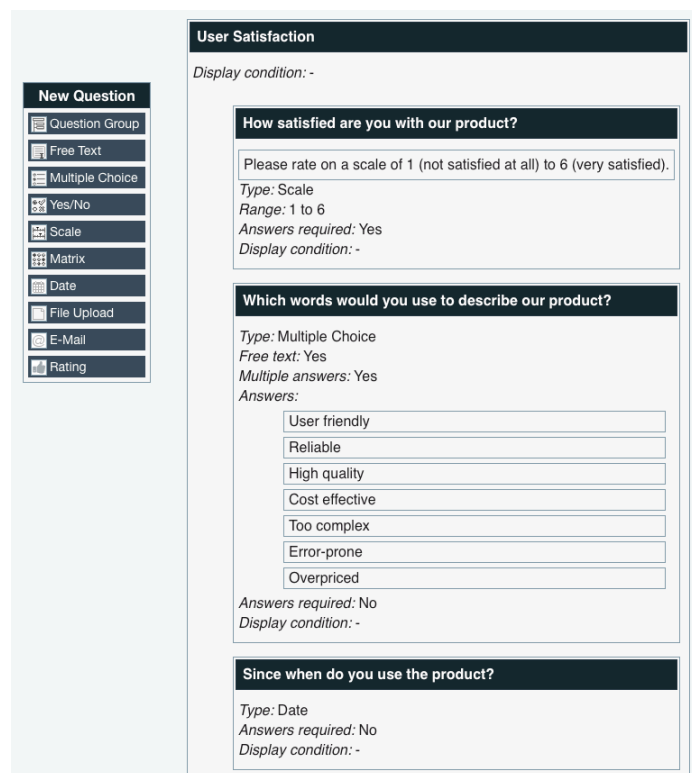
After a survey has been created, questions can be added below the form or later by choosing “Edit” in the survey editor. You can dynamically add new questions or edit existing ones. For polls the only available question is added automatically and can be changed below the poll form as well. To add a new question, just drag and drop the question type you want from the menu on the left. Alternatively you can simply click a question type to add the new question to the end of the survey.

When a new question is added, you can use the “text” field to enter the question itself. Checking “Show description” allows you to enter a descriptive text that will

be displayed to give further information to participants. It is also possible to upload a descriptive image for each question. As you choose the question type, the necessary fields for this type are shown. For the default multiple choice questions you are able to decide whether users can enter free text answers and if they are allowed to choose more than one answer. Answers can be added and removed dynamically.

If “Answers required” is enabled, every participant has to answer this specific question in order to submit the survey. In case the global “Answers required” flag of the survey is enabled, the configuration of single questions is ignored and all of them are mandatory.

Save your question or cancel creation by using the icons next to the question text in the header.



The screenshot displays the 'User Satisfaction' configuration screen in the Survey Editor. On the left, a 'New Question' sidebar lists various question types: Question Group, Free Text, Multiple Choice, Yes/No, Scale, Matrix, Date, File Upload, E-Mail, and Rating. The main area shows three questions with their respective configurations:

- How satisfied are you with our product?**
Please rate on a scale of 1 (not satisfied at all) to 6 (very satisfied).
Type: Scale
Range: 1 to 6
Answers required: Yes
Display condition: -
- Which words would you use to describe our product?**
Type: Multiple Choice
Free text: Yes
Multiple answers: Yes
Answers:
 - User friendly
 - Reliable
 - High quality
 - Cost effective
 - Too complex
 - Error-prone
 - OverpricedAnswers required: No
Display condition: -
- Since when do you use the product?**
Type: Date
Answers required: No
Display condition: -

Survey Editor also allows you to build simple dependencies between questions: Use the field “Display condition” if a specific question (or question group) should only be displayed based on the participant’s answer to another question. Simply select the question and answer that should trigger the display. This can be any multiple choice or yes/no question in the survey, but you should obviously select questions that are positioned before the conditional one. In case such a conditional question

is configured as mandatory, this validation will only be used if the question is displayed.

Did you use similar products before?
Type: Yes/No Answers required: No Display condition: -

Which products did you use?
Type: Free Text Answers required: No Display condition: Did you use similar products before? -> Yes

4.5. Editing questions

Questions can be sorted and grouped by dragging and dropping the question header. Since question groups only support one level, moving a group into another group is not possible and will reset the group to its original position.

You can edit questions by clicking the small pencil icon in the top right corner of the question header, which appears as you move the mouse cursor over the question. Clicking the pencil icon enables the editing mode. While this mode is active, saving the survey, sorting questions, or editing any other question is disabled. You can leave editing by using the save or cancel icon next to the question text again.

In editing mode you are able to change any attributes of a question except for the type. While editing multiple choice questions, you are able to sort the available answers via drag & drop.

4.6. Survey translation

Surveys and polls can be translated into all languages configured for your Liferay portal instance. The Survey Editor always opens with your portal's default language by default and you can switch to any other language via the controls in the top. Everything you type into the survey information, questions, and answers is then saved for the currently selected language. If there is no translation yet, the editor shows the values of the default language to make translating easier.

Participants see your surveys in the language they have configured for their account (or the default language for guests) and can optionally select a different

language by hand if a translation is available. Please make sure to always fill all fields in your default language, since these will always be used if no appropriate translation is available.

4.7. Migrating existing Liferay Polls

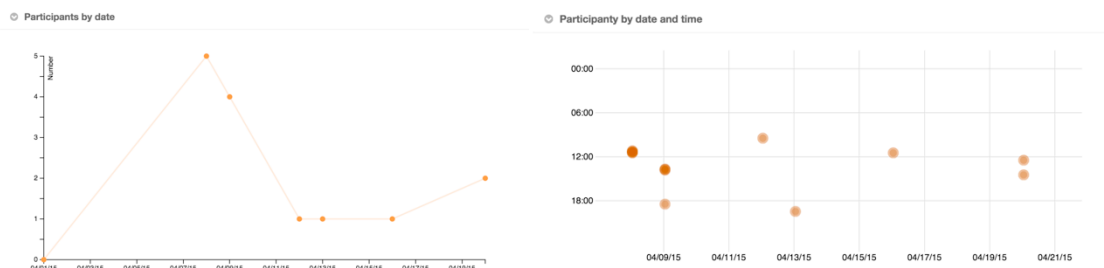
Since our poll support is based on Liferay Polls, existing polls in Liferay 6.2 can still be used with our portlets. Before they appear in any of them, they need to be migrated by choosing “Edit” in Liferay’s polls portlet in the control panel. This creates the necessary objects for our portlets and also copies existing votes for this poll into the new result format. This action only adds additional information to your polls. They can still be used in the standard Liferay portlets afterwards. Due to the different vote formats, votes given via our portlet after migration will not show up as results in Liferay’s polls portlet and vice versa. This migration process is not available for Liferay 7, so polls have to be created directly via RTG Survey Editor in this version.

5. Viewing Survey Results

“RTG Survey Monitor Portlet” can be found right next to the editor portlet and allows you to view the results of your surveys.




5.1. Getting an overview

Once you select a survey in the monitor portlet, an overview of the whole survey is displayed. It starts with two graphs that show you how many participants the survey had each day and how exactly they are distributed over time.



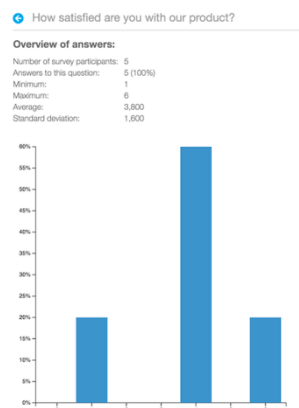
Below these graphs you can find an overview of the answers to every single question. Depending on the question’s type a suitable chart is displayed. For free text questions a word cloud is rendered based on the words used in all answers and

indicating the number of occurrences of a word via it's size. The column "Answered" tells you how many of the survey participants gave an answer to this question. While viewing the results of a poll, instead of this table is directly replaced by the detailed question information described in the following chapter.

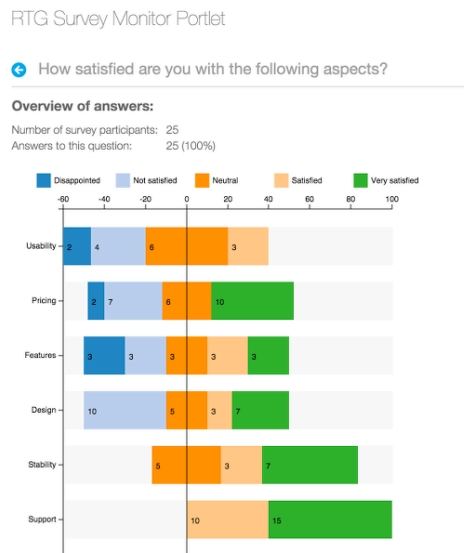
Have you used any similar products before?	Yes/No	7/14		Details
Which similar products did you use?	Free text	5/14		Details
Do you have any further comments?	Free text	6/14		Details

5.2. Viewing detailed information

Clicking the "Details" button next to a survey question brings up a more detailed view. In general this includes a bigger version of the chart and statistic information for scale questions.

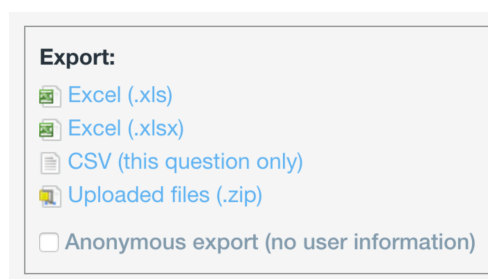


For free text and multiple choice questions with a free text option, you can again find a word cloud based on the answers on the details page. All given free text answers are displayed on this page as well. This list can be filtered by clicking a word in the word cloud.



Matrix questions get rendered into a single chart as shown above to make comparisons easier.

5.3. Exporting survey results



The survey result overview page as well as the detailed page for a specific question both allow you to export survey results as Excel or CSV file. The Excel export supports the old XLS format (before Excel 2007/2008) and the newer XLSX format (for Excel 2007 and above). While viewing the details of a file upload question, you can also download all uploaded files in a ZIP archive.

Exporting a survey to Excel format always results in a file containing an overview sheet of all survey questions and a separate sheet for each question containing all

answers given to this question. The question detail page in the monitor portlet provides a CSV export of only the answers to this specific question as seen on the screenshot above.

Since polls only consist of one question, they can be exported as a single Excel sheet and CSV as well.

The default Excel and CSV reports contain user IDs and names of participants if available. To generate reports without any user information, simply enable the “Anonymous export” checkbox before downloading them. The resulting files only contain an anonymous “Participant ID” that enables you to link answers given by the same participant.

6. Publishing Surveys

This chapter describes how to allow survey participation by using the survey viewer portlet.

6.1. Putting your survey on a portal page

In order to display a survey you need to put an instance of “RTG Survey Viewer Portlet” on a new or already existing portal page. Once it is added you are able to configure the instance by using the Liferay portlet configuration in the top right corner.

Product survey

User Satisfaction

Questions concerning your satisfaction with our product.

How satisfied are you with our product?

Please rate on a scale of 0 (not satisfied at all) to 6 (extremely satisfied).

0 1 2 3 4 5 6

Which words would you use to describe the product?

High quality

Reliable

Useful

Overpriced

Poor quality

Other

Did you use any similar products before?

Yes

No

The configuration view allows you to choose an Application Display Template that will be used to render the survey/poll and the survey/poll itself. The type selection box in the top allows to switch between survey and poll configuration. The current version of RTG Survey only includes one template for surveys and two for polls, but

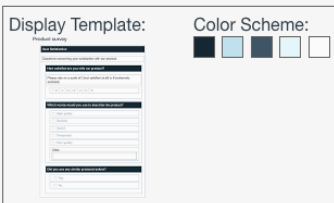
more will be added in the next versions. Alternatively you can create your own template by duplicating the “Simple Survey/Poll” template within the global site. A preview of the selected template is always displayed above the selection to give you a first idea of how it will look. “Fluent” polls work without any page reloads and are able to directly show results in the same style as the poll itself. “Simple” polls/surveys display questions as a standard form that needs to be submitted and leads to a page reload.


Type Selection

Type
Survey

Survey Configuration

Preview:

Display Template: 

Color Scheme: 

Display Template
Simple Survey [Manage Display Templates for Liferay](#)

Color Scheme
Standard

Survey
Product survey

[Save](#)

While templates completely change the way a survey/poll looks and works, there is also the option to choose a color scheme. Currently RTG Survey offers the default orange scheme and two flat options in blue and green. Additional schemes can easily be added. Please feel free to contact us for detailed information.

After the template and a survey have been configured, the portlet instance should show the survey and is then ready for participants. Make sure that the users you want to participate are allowed to access this portal page and view the portlet as well as the survey itself.

6.2. Notes on survey participation

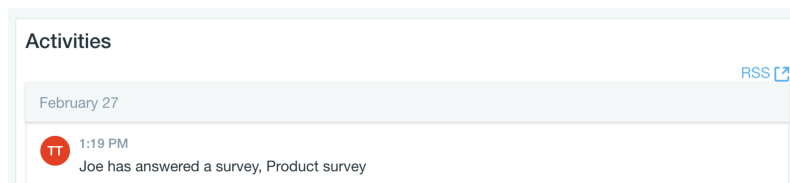
After submitting a survey, registered users are able to update their answers by visiting the survey page again, unless the “Allow multiple submissions” checkbox has been activated for this survey. If guest users are allowed to participate, they can do the same as long as their portal session is active. This mechanism also prevents users from directly answering a survey again if you don’t explicitly allow them to.

7. Using Liferay Social Activity

Since version 1.3 RTG Survey offers an integration of Liferay Social Activity. This chapter describes how to use this feature.

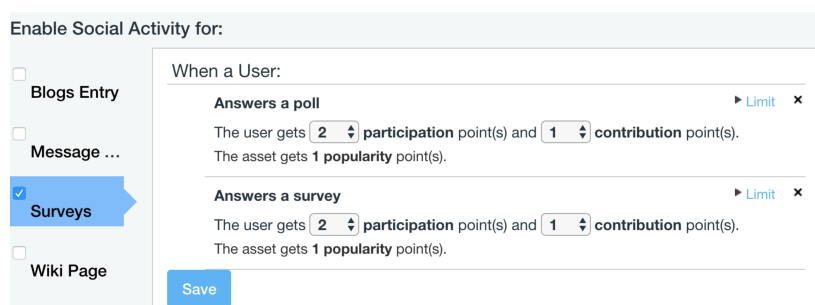
7.1. Displaying user’s survey participation

If you use Liferay’s Activities portlet, survey and poll participation of your users will be displayed as an activity with a link to the survey page.



7.2. Awarding participation and contribution points

You can configure participation and contribution points for survey and poll participation via the default Liferay tools. You can find those in the control panel’s site administration in the “Configuration” menu as “Social Activity”. Detailed information can be found in the Liferay documentation.



8. Troubleshooting

- 1. Why can't I choose an Application Display Template in the portlet configuration?**

You should always be able to configure the "Simple Survey/Poll" template, as it is automatically created when deploying the portlets. If it is not available, make sure it still exists for the "global" site. If it does not exist please try to redeploy the portlets. If the template got broken, first delete the template and then redeploy.
- 2. Why can't I choose the survey I created in the viewer configuration?**

Surveys can only be used within the same site they were created in. Only surveys of the "global" site can be used from anywhere.
- 3. Why does drag & drop not work for (some) questions in the editor?**

It is not possible to drag a question group into another one. Moving questions between groups or sort them within the same group, should always work.
- 4. Why does Liferay's polls portlet show other poll results than the Survey Monitor?**

Since votes given via our portlet are saved in a different way, Liferay's portlet does not show them and we do not show votes given via Liferay's portlet after poll migration. When first opening a Liferay poll in the Survey Editor, the already existing votes are migrated into our format and will be displayed properly. We suggest to only use Survey Viewer to display the poll after migration.
- 5. Why aren't all polls from Liferay's polls portlet available in RTG Survey?**

Polls that have been created via the default Liferay portlets need to be converted before they show up in the Survey Editor. To do so, find them in the Liferay portlet and select "edit" in the menu on the right. This will open the poll in the Survey Editor and make it available in all our portlets.
- 6. When updating to a newer version of RTG Survey, the portal throws an error (NullPointerException in the log file)**

If your portal runs with security manager enabled, there is a bug in a third party library used by Liferay, that prevents an upgrade of the database tables. If you experience this problem, please deactivate security manager temporarily, update RTG Survey and turn security management back on. If this is not an option for you, please contact us for an alternative solution.