Making an online survey in Citizen Space
A quick start guide (for v4)
June 2019
Introduction
So you've just been asked to create an online consultation... but you've never used Citizen Space before. Don't worry! This quick start guide will walk you through the basic steps of building an online survey in Citizen Space.

NB: this guide is not an exhaustive manual. It doesn't go into every detail or demonstrate every possibility. It's designed to be used in conjunction with the Citizen Space knowledge base, which gives more detail on particular processes, is frequently updated and is fully searchable. Access the knowledge base at https://delib.zendesk.com/home

Look out for the yellow boxes!
Each one contains links to more detailed instructions and information on a given topic in the knowledge base.
http://bit.do/citizenspace

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**Where to start**

**Have a plan in mind first**
Before you even log into Citizen Space, it's probably a good idea to have a clear sense of what you want to end up with. Citizen Space is a very powerful and flexible system; it has a lot of options and possibilities; It's designed to do *what you want it to do*. That means you need to *know* what you want it to do! It can often work well to have a picture in your head, or on paper, of the consultation you’re trying to create before you start. Then you can use Citizen Space to realise that online.

**Access the admin system**
First, log in to your Citizen Space admin area. (The address will probably be something like yourorganisation.citizenspace.com/login)

*Having difficulty logging in?*
Check the steps at [http://bit.do/cs-login](http://bit.do/cs-login)
Creating a consultation

Add a consultation

The admin area is where you can manage all the different components of your Citizen Space. For now, though, we’re only interested in creating a new online consultation – so go to the Consultations section. (If you’re not there already, just click ‘Consultations’ in the ‘Manage’ bar near the top of the page).

The all-important ‘Add Consultation’ button is near the top-right of the Consultations page. Click it!
**Setting up your consultation**

The ‘Add Consultation’ screen is where you set up the bare necessities of your consultation. The key thing for now is that we want to create an **Online Survey** – so make sure that option is selected under ‘Consultation Type’. When you’re happy with your consultation title and so on, click ‘Add Consultation’.

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**Not sure what all these options mean?**

Learn more about the different consultation types: [http://bit.do/consultation-types](http://bit.do/consultation-types)

Get the lowdown on editing consultation URLs: [http://bit.do/editing-the-URL](http://bit.do/editing-the-URL)
**Fleshing out the consultation**

Alright! You should now be at the ‘Consultation Dashboard’ screen. This is the hub for everything to do with this particular consultation.

You’ll notice that you can’t yet publish this consultation. That’s because we haven’t entered enough of the details or content yet. So let’s get started with doing that now.

The steps for fleshing out your consultation are listed at the top left hand side of this screen. Let’s begin at the beginning: click on **1. Edit Consultation Details**.

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**Understanding the dashboard**

Find out more about the different information included in the consultation dashboard: [http://bit.do/cs-dashboard](http://bit.do/cs-dashboard)
Edit consultation details
This section is where you enter everything about your consultation – not the survey questions themselves, but the big picture information: ‘what’s the reason for the consultation, who’s it for, when is it open?’ and so on.

You’ll see that some of the fields here are marked ‘Required to publish’. Make sure you’ve at least filled in something for all of these sections. You can always come back and amend or add to this later.

More detail on Consultation Details
If you’re not sure what some of these options do, have a look at steps 8-21 here: http://bit.do/detailed-instructions

When you’ve set up the essential details, hit Save at the bottom of the page. You should see a reassuring ‘Changes saved’ message – and hopefully a notification that ‘the required sections in the Consultation Details are complete’.

Now you can head back to the Consultation Dashboard to create your survey questions.
Building the survey itself
Creating your survey
Back at the Consultation Dashboard, you should see that you’re now able to Publish this consultation (because we’ve filled out all the ’required’ details). But we don’t want to do that yet! We’ve still got to add the actual survey questions.

To create your consultation questions now, click on step 2. Online Survey.
Online survey settings
This will take you to the ‘Online Survey’ settings page. This lets you set lots of nifty details for your survey, like how the questions are numbered, what message people receive when they complete the consultation and so on. Feel free to tinker with these now if you want to; you can also come back and tweak them later. But the main thing we want to do immediately is start creating the survey.

Just before we launch into that, there are three key concepts you need to understand about how Citizen Space surveys are structured: Pages, Questions and Answer Components.

So many settings
What does 'progression format' do?
http://bit.do/progression-format

What numbering options do I have?
http://bit.do/numbering-options

How does the completion message work?
http://bit.do/completion-message
Pages, Questions and Answer Components

In Citizen Space, a Consultation is made up of Pages. Each Page contains a number of Questions. Each Question can contain a number of Answer Components.

To visualise that in practice, here’s a typical Citizen Space survey ‘front end’ (the bit the public sees).
Adding a Page
Hopefully, understanding Citizen Space’s structure makes it easier to build your consultation.

If you look again at the Online Survey screen, you can see that your survey actually already has an ‘Introduction’ page. (This page is included by default in every new Citizen Space survey – you can change its content, Questions and Answer Components however you like, though).

For now, let's just click Add a new page. On the ‘Add page’ screen, enter a title and any extra info you want; then hit ‘Add Page’.
Adding a Question
OK, so we now have a nice new Page – but it doesn’t contain any questions yet. Let’s address that immediately: click **Add a question** in the left-hand sidebar. (This sidebar lets you quickly navigate all the questions within a page – once we’ve added some!)

On the ‘Add question’ screen, enter the text of your question (don’t worry about answers, extra information or anything else at this stage – just the question text). Then hit ‘**Add Question**’.

**Questions, questions**
What are ‘saved questions’?  

What are ‘analyst questions’?  
Adding one or more Answer Components

Now that we’ve got a question, we need some way for people to answer it! This is where the rubber really hits the road: let’s add an Answer Component. As you can see, there are quite a lot to choose from: do you want people to pick one option from a dropdown, or to tick multiple checkboxes; to identify a point on a map, or just to write a free text answer?

Don’t worry if you’re not sure which type of answer component is the one you want – you’ll get a preview of each component to see an example of it in action when you select it from the dropdown.

When you’ve identified the right answer component for your question, select it and click ‘Add’.

Fill out the various options for your chosen answer component (each type will have a slightly different set of fields) and then click Add Component. Congratulations: you just added your first question!

More about answer components

What are the different answer components? http://bit.do/answer-components

How do I include more than one answer component in a single question? http://bit.do/multiple-answers
Preparing for preview
Repeat as required
You’ve now gone through all the essential steps for creating the core components of your consultation. To complete your survey, simply add more Pages, Questions and Answer Components as necessary.

As you do so, you’ll see them appearing in the left-hand sidebar of your survey. From here, you can quickly navigate to, edit, move around or delete any component of your consultation.

Modifying parts of a survey
How do I move or add pages?

How do I reorder questions?
http://bit.do/reorder-questions

What if I want a non-linear survey?
We have a comprehensive guide to skip logic:
- Part 4: editing skip logic rules http://bit.do/skip-logic-4
Preview, preview, preview

At any point, you can preview your consultation to see how the whole thing would look to a participant. The ‘Preview Consultation’ button is always at the top right hand side of the admin interface. **Use this option frequently before publishing any consultation!**
Use Preview mode to make sure that the flow of the consultation is working as you expect it to, that the questions are set up correctly, that any extra information is displaying as intended and so on.

If at any point you spot something you’d like to change, just click Leave preview at the top of the screen to return to the admin interface. You can make any amendments you need to and then return to preview mode to double-check them.

Learn to love Preview mode!

Preview options
How do I send a preview to a non-Citizen-Space-administrator for sign-off?
http://bit.do/preview-signoff
Publish!
When you’re absolutely sure that you’re happy with your consultation, you’re ready to publish. Return to the Consultation Dashboard, take a deep breath and hit that big green ‘Publish’ button.

Congratulations: you just published your first consultation! If, for any reason, you suddenly need to withdraw or amend the survey, just hit the big red ‘Retract’ button. But hopefully all is well – and you can now go and see the consultation in the front end of your Citizen Space instance, send the link to people, start inviting participants and watch the responses come flooding in. Good job!

Consultation Dashboard: Customer feedback: do you read our screenshots?

1. Edit Consultation Details
   All required information has been completed.
2. Online Survey
   The survey currently has 2 pages and 4 questions.
3. Set Up Response Publishing
   No responses will be published.
4. Manage Theme
   This consultation uses the site wallpaper as its banner.
5. Preview Consultation
   At any time you can preview the consultation as an end user would see it.

Status: Unpublished
Opens on 30/09/2016 (38 days)

- Edit Unavailable Message
- Share Preview Link
- Print Survey
- Clone this Consultation
- Delete this Consultation

Publishing problems?
If you’re having trouble setting a consultation live, check the steps here first:
http://bit.do/publishing-problems
**Troubleshooting**

Remember, if you’re looking for help that’s not covered by this guide, you can always try Zendesk. (NB – don’t search too specifically. A search for ‘users’ will probably get you to something helpful faster than ‘how do I create an analyst-only user type for my consultation?’)

If you’re still stuck, or something seems to be playing up, you can always get in touch with us direct:

- **1800 034 129** Australia
- **1855 207 0161** Canada
- **0845 638 1848** UK
- **1888 966 9677** USA
- **0800 446 167** New Zealand
- Worldwide **+44 1173 812 989** | **support@delib.net**