

BF Survey User Guide

The user guide for com_bfsurvey

Tim Plummer

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Tim Plummer

Publication date December 2014

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Table of Contents

1. Introducing BF Survey	1
1. Introduction	1
1.1. What is BF Survey?	1
1.2. System Requirements	2
2. Installing BF Survey	2
3. Install from Directory	3
4. Control Panel	4
2. Quick Start	5
1. Quick Start Guide	5
3. Configuration	6
1. Setting up categories	6
1.1. Survey Categories Options	8
1.1.1. Survey Type	9
1.1.1.1. All questions on one page	9
1.1.1.2. Multipage tabbed survey	9
1.1.1.3. Multipage survey	12
1.1.1.4. Multipage tabs with buttons	14
2. Adding Questions	15
2.1. Question Fields	15
2.1.1. Details Tab	15
2.1.1.1. Category	15
2.1.1.2. Question	16
2.1.1.3. DB Field Name	16
2.1.1.4. Question Type	16
2.1.1.5. Mandatory	20
2.1.1.6. Parent	20
2.1.1.7. Help Text	20
2.1.2. Options Tab	20
2.1.2.1. Options	20
2.1.3. Visibility Tab	21
2.1.3.1. Hide this question if	21
2.1.3.2. Show this question if	21
2.1.3.3. Terminate options	21
2.1.3.4. Terminate URL	21
2.1.4. Advanced Tab	21
2.1.4.1. Suppress Question	21
2.1.4.2. CSS Class	21
2.1.4.3. Field Type	21
2.1.4.4. Field Size	21
2.1.4.5. Validation Type	21
2.1.4.6. Field Titles	22
2.1.4.7. Field Total	22
2.1.4.8. SQL	22
2.1.4.9. SQL Key Field	22
2.1.4.10. SQL Value Field	22
2.1.4.11. Horizontal Label	22
2.1.4.12. Option Prefix	22
2.1.4.13. Option Suffix	22
2.1.4.14. _OTHER_ Prefix	22
2.1.4.15. _OTHER_ Prefix	22
3. Adding your survey menu item	23

4. Component Options	24
1. Survey Options	24
2. Permissions	25
5. Email Template	27
1. Survey Emails	27
1.1. Email Template Tab	27
1.2. Email Trigger Tab	27
6. Advanced features	28
1. Conditional Branching	28
2. Using Recaptcha	31
3. Pre-populate fields on the form via URL	33
4. Protecting Personal Information - do not store data	33
7. Results	34
1. Results Category	34
2. Result	34
8. Statistics	35
9. Reports	36
1. Creating Reports	36
1.1. Details	36
1.2. Include the following	36
1.3. Selection Criteria	36
1.4. Advanced	36
2. Generating Reports	37
3. Report Templates	37
10. Upgradeing	42
1. How to upgrade	42
11. Maintenance	43
1. Backup database tables	43
2. Auto database cleanup	43
3. Import data from BF Survey Plus	43
3.1. Manual import	44

Chapter 1. Introducing BF Survey

1. Introduction

1.1. What is BF Survey?

BF Survey allows you to create surveys, forms, and applications with Joomla! quickly and easily.

This documentation is for the new BF Survey version only. For BF Survey Plus, please refer to <http://tamlynsoftware.com/products/bf-survey-plus/bf-survey-plus-user-guide.html>

For previous users of BF Survey Pro (J1.5) or BF Survey Plus(J2.5/3.x), this software is a complete rewrite using Akeeba FOF (Framework On Framework), and while it has similar functionality the code is significantly different.

The name of this product is reverting back to BF Survey, dropping the pro and plus suffixes previously used to distinguish between different versions of Joomla targeted. Now that we have a subscription based business model, a single subscription gives you access to all variations of BF Survey, BF Survey Plus and BF Survey Pro, so there was no longer a need to have different product names.

The version number of this software starts at 2.0.0, so that it is clear that this is the latest version, and it will eventually completely replace BF Survey Plus.

There are some features of BF Survey Plus that have not been implemented in the new version of BF Survey including:

- Summation question type
- SAYG (Save as you go) survey (tabs are now used for pages, and keep alive makes it no longer necessary)
- Complex validation, including validate-checkbox2, validate-checkbox3 etc.
- Bigo Captcha (software now only uses ReCaptcha)

Some of these features may be included in future versions of the software, and some features have been retired.

Benefits of the new version include:

- Mobile responsive
- CSS, JS, and media overrides
- PDF generation of reports
- Some of the complexity reduced, for example automatic db field name generation
- New attachment question type
- Content version history
- Email invites
- Multiple recipient Emails

- Pre-populate form data via URL

1.2. System Requirements

PHP 5.3 or greater

Joomla 3.2.3 or greater is recommended

Joomla 2.5.22 or greater - Since RC3 backwards compatibility has been added for Joomla 2.5. Note that some features require features not available in Joomla 2.5, so these are disabled. If you are still using Joomla 2.5, you should consider upgrading to Joomla 3 as Joomla 2.5 has an end of life scheduled for December 2014.

GD Image Library - for thumbnail generation of image attachments

This software uses FOF and Bootstrap, both included in Joomla 3. For Joomla 2.5 users, bootstrap is provided by Akeeba Strapper. It also uses a third party library for PDF generation called tcpdf which is included in install package.

Important

BF Validate Plus plugin is NOT required for BF Survey, as all the form validation is now built in using JQuery rather than MooTools.

2. Installing BF Survey

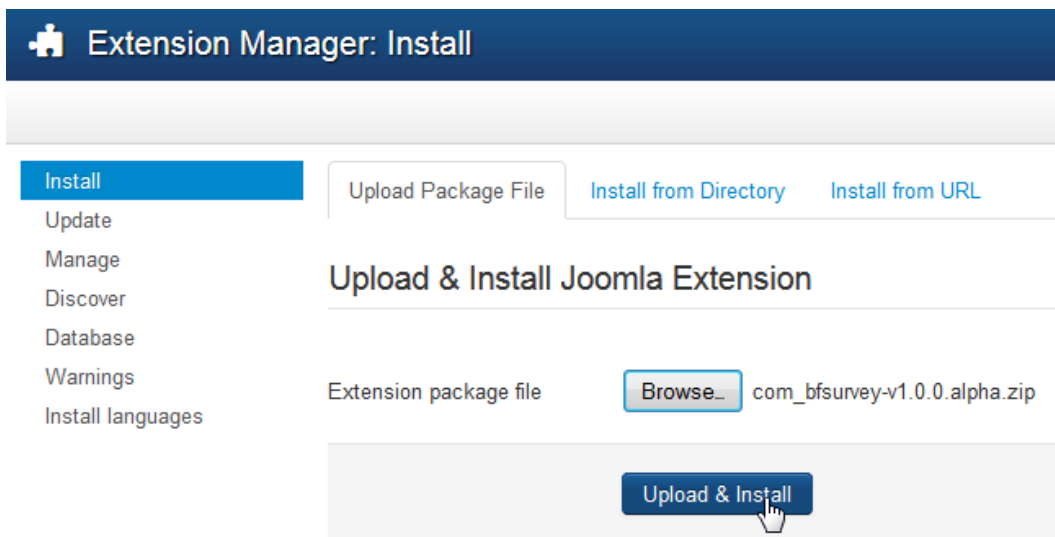
BF Survey is packaged in a .zip file, and can be installed via the Joomla extension manager.

Extensions->Extension Manager

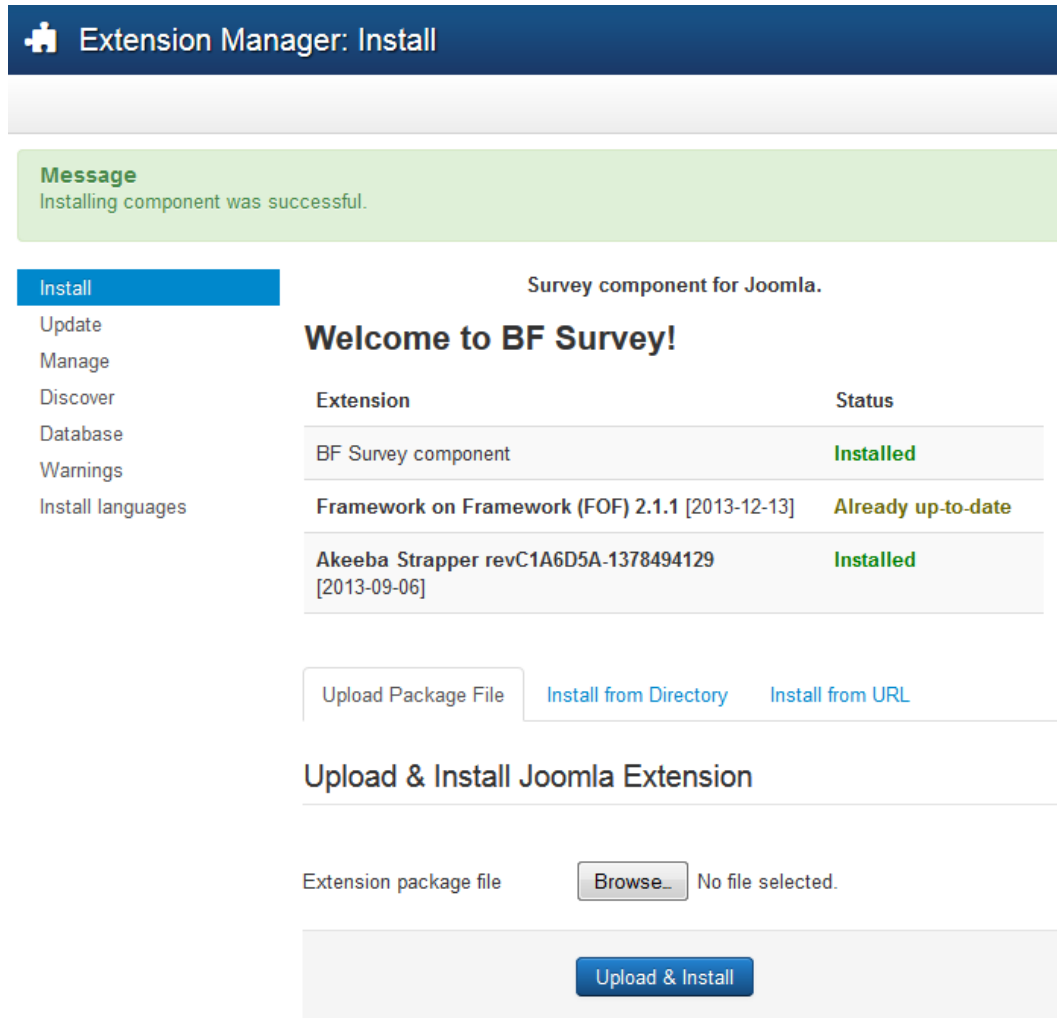
Upload Package File

Browse for zip file

Upload and Install



The screenshot shows the Joomla! Extension Manager interface. At the top, there's a blue header with a puzzle piece icon and the text "Extension Manager: Install". Below this is a sidebar with a list of options: "Install" (highlighted in blue), "Update", "Manage", "Discover", "Database", "Warnings", and "Install languages". The main content area is titled "Upload & Install Joomla Extension". It contains a form with the following elements: a label "Extension package file", a "Browse..." button, and the text "com_bfsurvey-v1.0.0.alpha.zip". At the bottom of the form is a large blue button labeled "Upload & Install" with a hand cursor icon pointing at it.



Extension Manager: Install

Message
Installing component was successful.

Install | Survey component for Joomla.

Welcome to BF Survey!

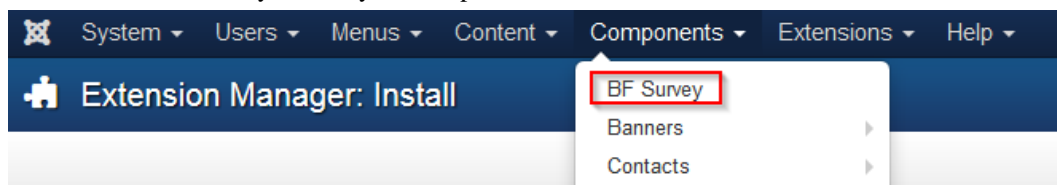
Extension	Status
BF Survey component	Installed
Framework on Framework (FOF) 2.1.1 [2013-12-13]	Already up-to-date
Akeeba Strapper revC1A6D5A-1378494129 [2013-09-06]	Installed

[Upload Package File](#)
[Install from Directory](#)
[Install from URL](#)

Upload & Install Joomla Extension

Extension package file No file selected.

You should now see a BF Survey link on your components menu.



System ▾ Users ▾ Menus ▾ Content ▾ **Components ▾** Extensions ▾ Help ▾

Extension Manager: Install

- BF Survey**
- Banners ▸
- Contacts ▸

3. Install from Directory

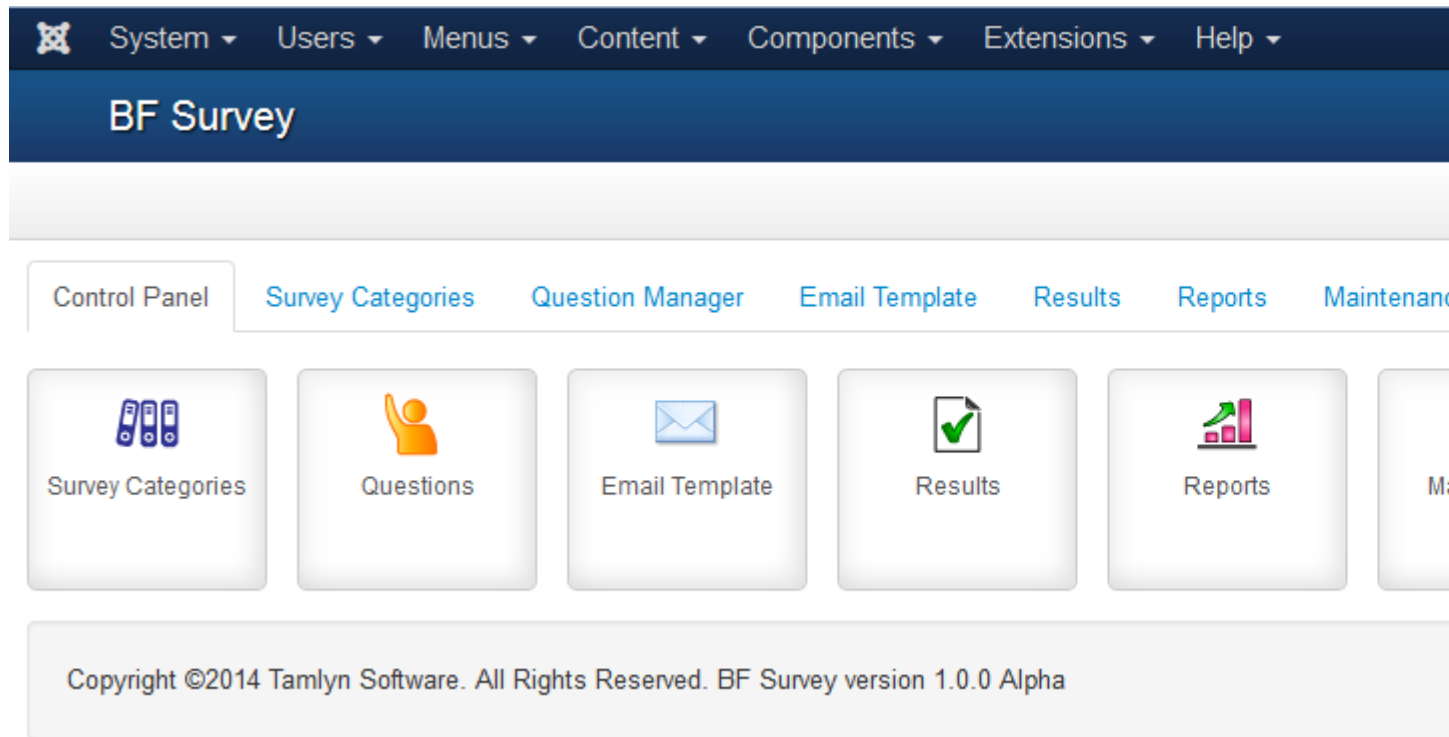
If the normal installation fails, you can try using the install from directory feature of Joomla.

Before doing anything else, you have to extract the installation ZIP file in a subdirectory named bfsurvey on your local PC. Then, upload the entire subdirectory inside your site's temporary directory (usually /tmp).

Click on Extensions, Manage link on the top menu. If you are on Joomla! 3.x please click on the Install from Directory tab. Locate the Install Directory edit box. It is already filled in with the absolute path to your temporary directory, for example /var/www/joomla/tmp. Please append /bfsurvey to it. In our example, it should look something like /var/www/joomla/tmp/bfsurvey. Then, click on the Install button.

4. Control Panel

When you launch BF Survey, you will see the control panel view. This has a number of icons that you can press to access various sections of the software. The control panel view also allows you to access the component options.



Chapter 2. Quick Start

1. Quick Start Guide

For anyone who is impatient and just wants the really quick version, here is what you need to do to set up a survey.

1. Create a survey category
2. Add questions to that category
3. Create a menu item, and select your category

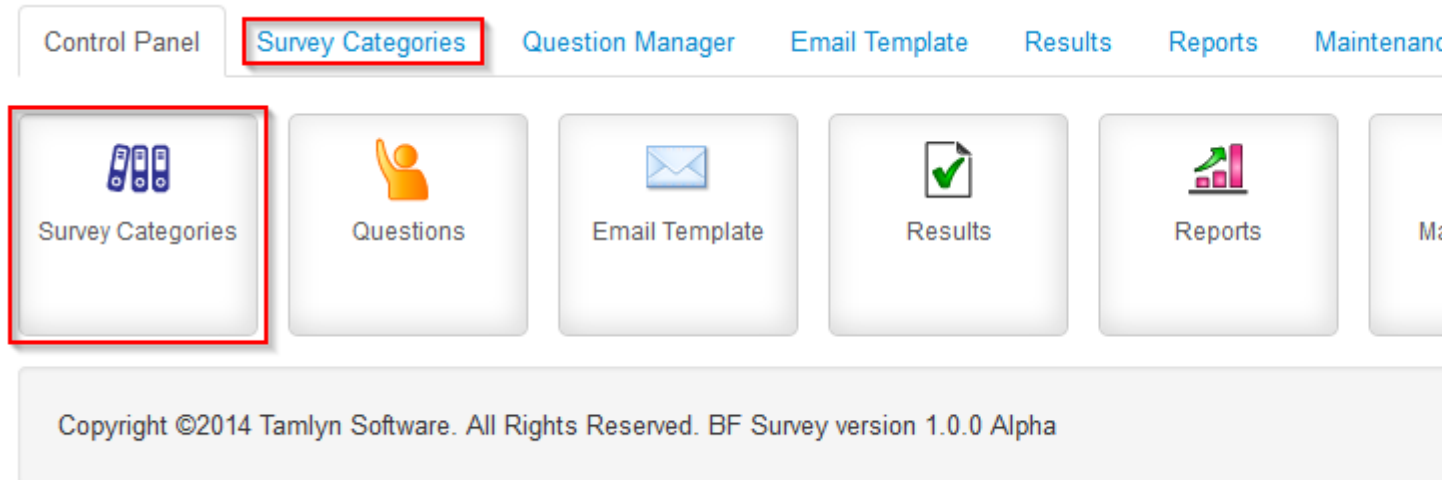
So that is the really quick version.

Chapter 3. Configuration

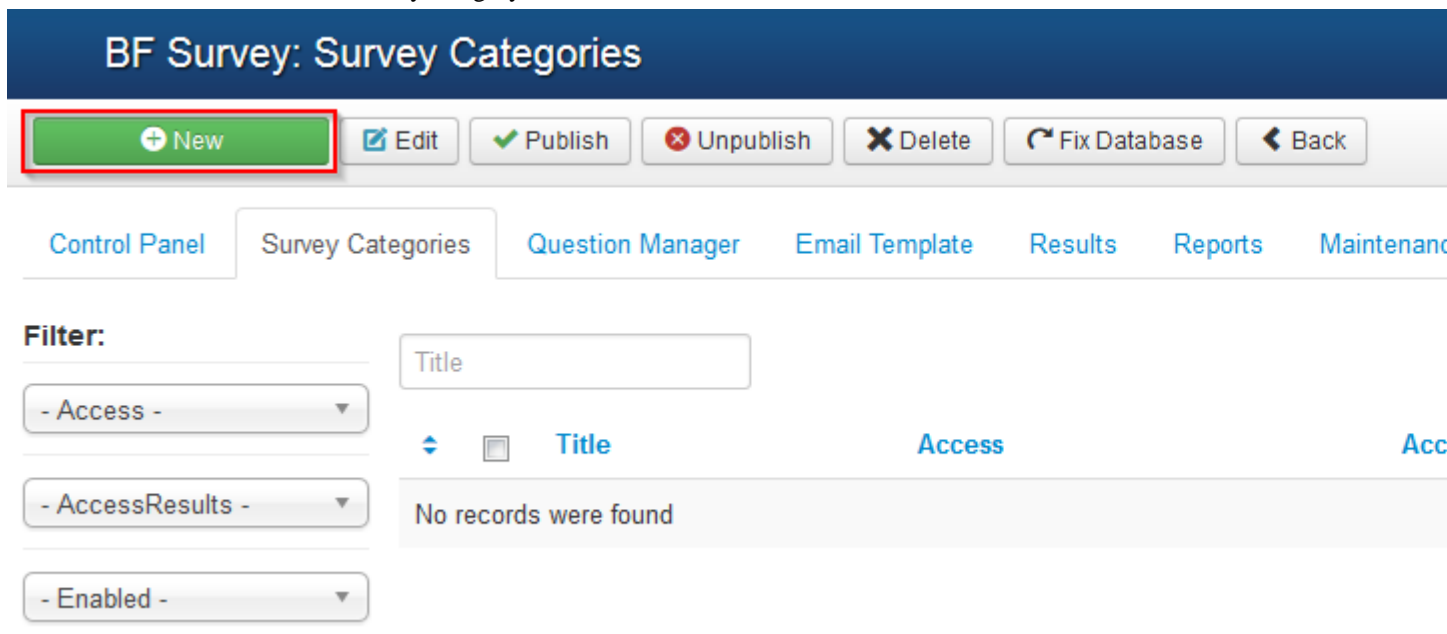
1. Setting up categories

Categories are used to group questions together the combine to make the form. This should be your first step when creating a new survey.

You can access the Survey Categories via the control panel icon or tab.





Click the new button to create a survey category.





Category Title is the only mandatory field that you must complete. This is the name of your survey, and will be used to link your questions to your survey.

BF Survey – Edit Category

 Save

 Save & Close

 Save & New

 Cancel

Details

Category Title *

Book Survey

This is the category that you will assign questions to for this survey

Survey Title

(optional) The title text that will appear above your survey

Access *

Public

Determines who can see these questions in the front end.

Access Results *

Special

Which group of users can access the individual results from the survey.

Status

Published

Unpublished

Introduction Text

Introduction text that will be shown before survey.

Thank you text

Save & close to create your survey

BF Survey: Survey Categories

+ New
✎ Edit
✔ Publish
✖ Unpublish
✕ Delete
↺ Fix Database
⬅ Back

Message
Category Saved

Control Panel
Survey Categories
Question Manager
Email Template
Results
Reports
Maintenance

Filter:

- Access -

- AccessResults -

- Enabled -

Title

		Title	Access
⬆	<input type="checkbox"/>		
⋮	<input type="checkbox"/>	Book Survey	Public

1.1. Survey Categories Options

When creating a survey, you will notice that there are a number of options available to help you customise your survey.

Survey Title: This text will appear above your survey as the title.

Access: Which group of users will be able to access the survey on the front end of your site.

Access Results: Which group of users will be able to access the results view where you can view and edit individual responses.

Status: Not currently used, but may be in future.

Introduction Text: This text appears above your survey after the survey title. This field does allow you to enter HTML code.

Thank you text: This text is shown after the survey form has been submitted.

Survey Type: This setting allows you to choose what type of survey you wish, including all questions on one page, multipage tab, multipage with next/previous buttons, or multipage tab with next/previous buttons. When using tabs, you should also group your questions with a heading question type as the parent for each of the questions to allow you to control which questions appear on each tab.

Redirect URL: Instead of showing thank you text, you can redirect to a different URL at the end of your survey.

Show Name Input: Do you want to show the name field at the beginning of the survey. For registered users that are logged in, this field is automatically populated.

Show Company Input: Do you want to show the company field at the beginning of the survey.

Show Email input:Do you want to show the email field at the beginning of the survey. For registered users that are logged in, this field is automatically populated.

Name Text:This is the text label used for the name field.

Company Text:This is the text label used for the company field.

Email Text:This is the text label used for the email field.

Submit button Text:This is the text that appears on the submit button.

Enable Anonymous Responses:Adds a radio button to toggle between showing name, company and email or hiding all these fields for an anonymous response.

Warning

If you hide the name, company and email fields, do not set enable anonymous to Yes

Anonymous Text:This is the text label for the anonymous response radio button.

Yes option text:This is the text used on the yes option of the anonymous response radio button.

No option text:This is the text used on the no option of the anonymous response radio button.

Prevent multiple entries (IP Address):When set to yes, each IP address can only complete the survey once.

Prevent multiple entries (Email):When set to yes, each user can only complete the survey once, based on their email address. This setting requires registered or higher access to the form.

Prevent multiple entries (UID):When set to yes, each user can only complete the survey once, based on their Joomla User ID (UID). This setting requires registered or higher access to the form.

Show Reference #:On the thank you page at the end of the survey, you can give the user a reference number for their submission. This number is based on the id of the record saved in the database.

Custom JavaScript:This field allows you to insert your own custom JavaScript that applies only to this survey category.

Theme:This allows you to change the look and feel of the form by applying different CSS. All these themes can be customised via CSS overrides.

Custom CSS:This field allows you to insert your own custom CSS that applies only to this survey category.

1.1.1. Survey Type

There are four survey types available in BF Survey, the all questions on one page, and the multipage survey using tabs, and the multipage using next/previous buttons, and the multipage tab with next/previous buttons.

1.1.1.1. All questions on one page

This is the default survey type, with Show Tabs set to no in your survey category.

1.1.1.2. Multipage tabbed survey

Like much of the backend of Joomla, you can have tab based forms which allow you to group questions onto multiple pages.

There are two things you need to do to enable this tab based survey.

- Set Survey Type to Multipage tab in your survey category

Survey Type

One page

Multipage tab

Multipage

Do you want a multipage page form using tabs?

- Create heading question type, and group questions to these using the parent item. Each heading question will become a new tab.

First create a heading question, the Question title will be used on the tab.

Details
Options
Visibility
Advanced

Category *
Example

Question *
Questions

DB Field Name *
questions

Question Type *
Heading

Now group questions to this heading using the parent field

BF Survey – Edit Question

Save
Save & Close
Save & New
Cancel
Versions

Details
Options
Visibility
Advanced

Category *
Example

Question *
What is your favourite pet?

DB Field Name *
favourite_pet

Question Type *
Checkbox

Mandatory
No
Yes

Parent
- Questions

You can group as many questions as you like to each heading question.

BF Survey – Edit Question

Save

Save & Close

Save & New

Cancel

Versions

Details

Options

Visibility

Advanced

Category *

Example

Question *

How many birds do you have?

DB Field Name *

how_many_do_

Question Type *

Text

Mandatory

No

Yes

Parent

- Questions

You should now see the heading question, with questions below that are indented to indicate they are grouped together.

	Enabled	Question
	<input checked="" type="checkbox"/>	Questions
	<input checked="" type="checkbox"/>	-- -- What is your favourite pet?
	<input checked="" type="checkbox"/>	-- -- How many birds do you have?

Now when you view your survey, you will see some tabs. The details tab is default and includes the name, email, and company fields, and it will also display the Captcha (if turned on).

Details

Questions

Name *

Your Email *

Submit form

You can now see your questions grouped on the new tab.

Details

Questions

Questions

What is your favourite pet?

☐

Dog

☐

Cat

☐

Guinea Pig

☐

Bird

How many birds do you have?

Submit form

There is no limit to the number of tabs you can create for each survey.

1.1.1.3. Multipage survey

This is similar to the multipage tab survey, except that it will show next and previous buttons instead of tabs, and will only show a single page at a time. The text shown on next and previous buttons can be set in the category.

There are two things you need to do to enable this multipage survey.

- Set Survey Type to Multipage in your survey category

- Create heading question type, and group questions to these using the parent item. Each heading question will become a new tab.

First create a heading question, the Question title will not be used so can be whatever you like.

Details
Options
Visibility
Advanced

Category *
Example

Question *
Questions

DB Field Name *
questions

Question Type *
Heading

Now group questions to this heading using the parent field

BF Survey – Edit Question

Save
Save & Close
Save & New
Cancel
Versions

Details
Options
Visibility
Advanced

Category *
Example

Question *
What is your favourite pet?

DB Field Name *
favourite_pet

Question Type *
Checkbox

Mandatory
No
Yes

Parent
- Questions

You can group as many questions as you like to each heading question.

BF Survey – Edit Question

Save
✓ Save & Close
+ Save & New
✗ Cancel
📄 Versions

Details
Options
Visibility
Advanced

Category * Example ▼

Question * How many birds do you have?

DB Field Name * how_many_do_

Question Type * Text ▼

Mandatory No
Yes

Parent - Questions ▼

You should now see the heading question, with questions below that are indented to indicate they are grouped together.

⬆	☐	Enabled	Question
☰	☐	✓	Questions
☰	☐	✓	-- -- What is your favourite pet?
☰	☐	✓	-- -- How many birds do you have?

Now when you view your survey, you will see the next button, which when clicked will show the second page. The first page shows the default fields such as name, email, and company fields, and it will also display the Captcha (if turned on).

There is no limit to the number of pages you can create for each survey.

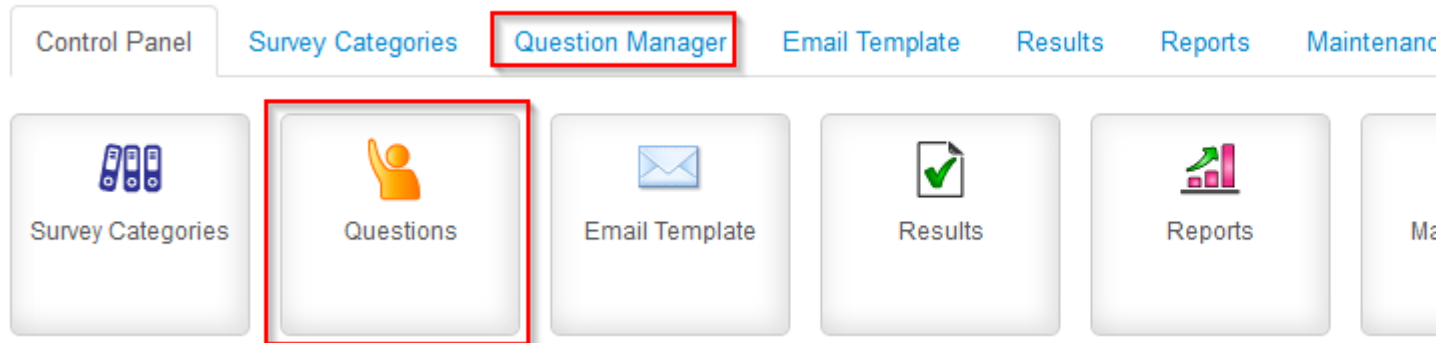
1.1.1.4. Multipage tabs with buttons

This is a combination of the multipage and the multipage tab, which shows both the tabs and the navigation buttons.

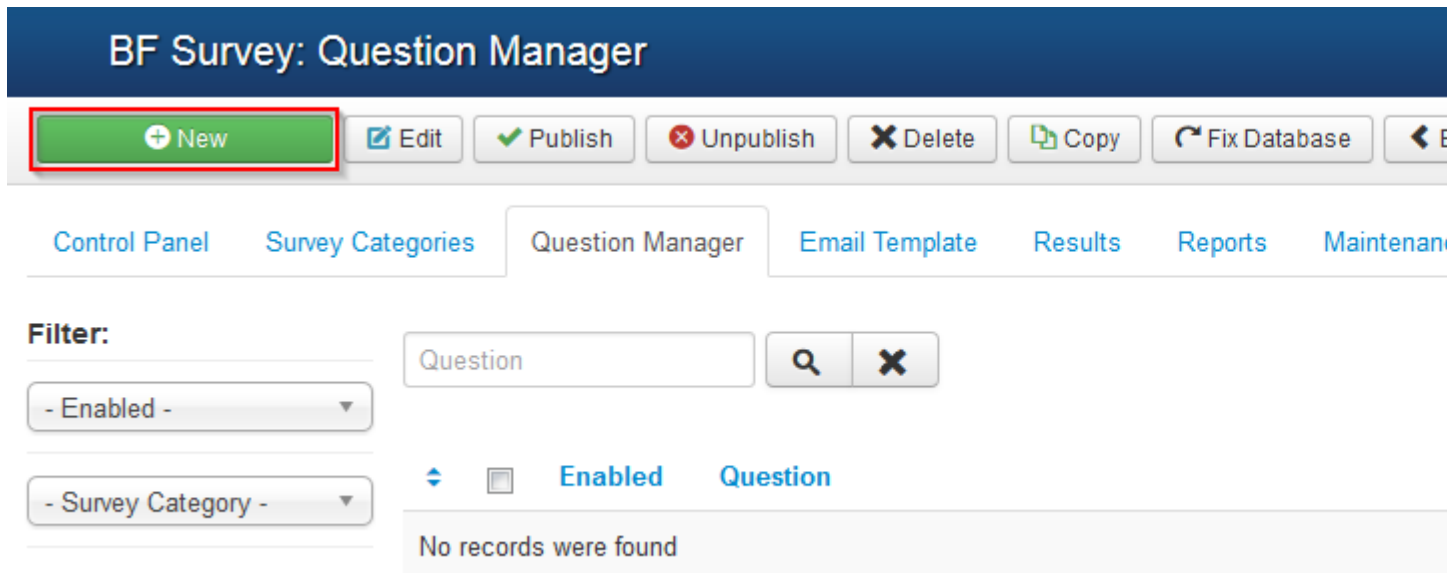
2. Adding Questions

To create your survey, you need to set up questions, which define the fields used to capture the required information.

You can access the questions section via the control panel button or tab.



Press the new button to create a question



Select your survey category, enter your question, and select the appropriate question type. Depending on the question type and what you are trying to achieve, you may need to complete some of the other fields too.

2.1. Question Fields

2.1.1. Details Tab

The default tab has the most important settings for the question.

2.1.1.1. Category

This is your survey category. Each category is a different survey.

2.1.1.2. Question

This is the text of your question. Note that you can suppress this text if required to prevent it from being shown to the user.

2.1.1.3. DB Field Name

This is automatically generated based on your question, but you need to make sure this is unique so if you have similar questions then you may need to add some characters to the default value. This is used to create the field in the mysql answer table that stores the survey responses, so it cannot contain spaces or special characters, just use lowercase alpha numeric characters only.

Warning

You also cannot use mySQL reserved words <http://dev.mysql.com/doc/refman/5.0/en/reserved-words.html>

Also avoid default database field names Name, Company, Email, enabled, ordering, created_by, created_on, modified_by, modified_on, locked_by, locked_on, ip, and status.

2.1.1.4. Question Type

This is the type of field used for this question.

Choices include:

- Text

What is your name?

- Radio

What is your sex?

Male
Female

When you have a small number of options, you can select horizontal label to make all the options appear on the same line.

Horizontal Label

No	Yes
----	-----

What is your sex?

Male	Female
------	--------

- Checkbox

What is your favourite pet?

<input checked="" type="checkbox"/>	Dog
<input type="checkbox"/>	Cat
<input checked="" type="checkbox"/>	Guinea Pig
<input type="checkbox"/>	Bird

- Textarea

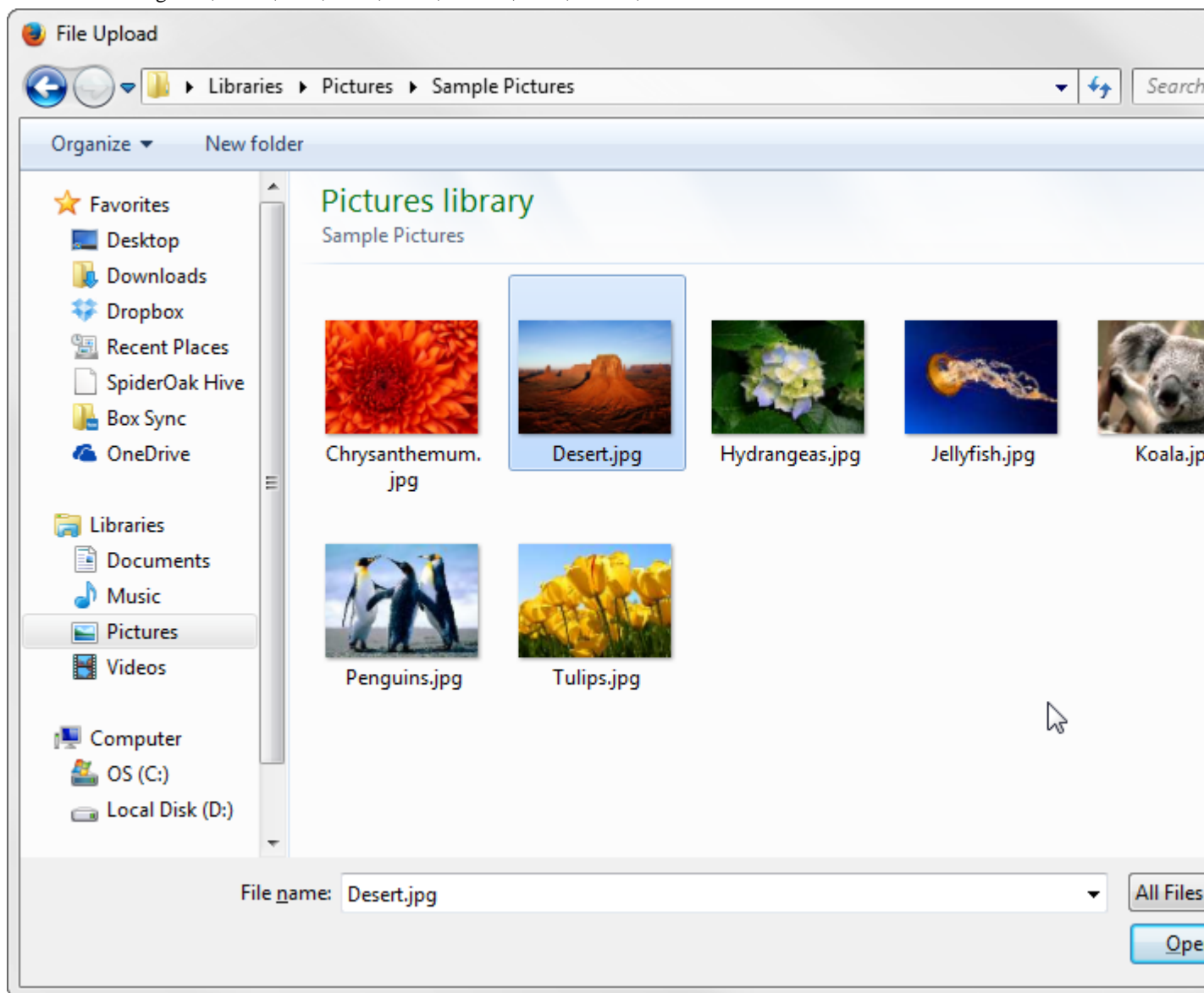
Comments

- Attachment

Please upload your photo

No file selected.

Pressing browse allows you to select a file from your computer to upload. Software currently supports a number of formats including JPG, JPEG, GIF, PNG, DOC, DOCX, XLS, XLSX, and PDF.



Once you have selected a file, you will see the file name appear next to the browse box.

Please upload your photo Desert.jpg

Warning

If you enter an incorrect Captcha, you will need to browse for attachments again.

- Date

D.O.B.

- DropDown

What is your favourite book?
 Magician
 Silverthorn
 A Darkness at Sethanon

- User List

Similar to drop down, but list of users is populated from your Joomla website.

Select account manager

Warning

There may be security implications of using this field type. I personally only use it on Intranet sites.

- Rating

Creates groups of radio buttons.

My Rating Question	Please rate the following				
Ford	<input type="radio"/> poor	<input type="radio"/> below average	<input type="radio"/> average	<input checked="" type="radio"/> good	<input type="radio"/> great
Holden	<input type="radio"/> poor	<input checked="" type="radio"/> below average	<input type="radio"/> average	<input type="radio"/> good	<input type="radio"/> great
Honda	<input type="radio"/> poor	<input type="radio"/> below average	<input type="radio"/> average	<input type="radio"/> good	<input checked="" type="radio"/> great
Subaru	<input type="radio"/> poor	<input type="radio"/> below average	<input checked="" type="radio"/> average	<input type="radio"/> good	<input type="radio"/> great

My Rating Question Please rate the following

Ford	1	2	3	4	5	6	7	8	9	10
Holden	1	2	3	4	5	6	7	8	9	10
Honda	1	2	3	4	5	6	7	8	9	10
Subaru	1	2	3	4	5	6	7	8	9	10

The two important fields are Field Titles and Total. Total defines the number of columns of radio buttons. Titles is optional, and allows you to replace the automatic numbers with text, just use semicolon to separate titles, and make sure the number of titles matches the total.

Field Titles

Total

Each option will have its own row of radio buttons.

Details Options Visibility Advanced

Option 1	Ford
Option 2	Holden
Option 3	Honda
Option 4	Subaru


- Heading

Headering questions are used for the tabs of multipage forms. They also just show heading text.

No database field is created for this question type, and there are no input fields.

- SQL

Similar to drop down, but options are populated via an SQL query.

SQL	<input type="text" value="SELECT tsoftware_product_id, CONCAT(productName, ' - ',colourName) AS product FR"/>
SQL Key Field	<input type="text" value="tsoftware_product_id"/>
Total	
SQL Value Field	<input type="text" value="product"/>
Product Name	<input type="text" value="Please Select"/> 

- URL

Similar to text, but when set to mandatory it will validate and ensure a URL is entered.

What is your website

- Helptext

This field is used to display whatever additional text on the form that you desire, and it allows you to embed any Joomla content plugin that you would normally insert into a Joomla article.

This field can be used to insert video (using a third party plugin such as Allvideos).

No database field is created for this question type, and there are no input fields.

2.1.1.5. Mandatory

If set to yes, user will be forced to answer that question before the form is submitted.

2.1.1.6. Parent

This is used to group questions together. When using a tab based form, use a heading question as "top" and set other questions that should appear on this tab as the heading question for the parent item.

2.1.1.7. Help Text

This text appears when you place the cursor on the question label. It helps the user understand how they should answer this question.

2.1.2. Options Tab

These fields are used by the radio, checkbox and dropdown question types.

2.1.2.1. Options

Each option is a choice presented to the user.

You can also use `_OTHER_` as the option, which will add a text input field.

2.1.3. Visibility Tab

These fields are used to show/hide questions based on answers to previous questions.

Refer to the advanced features conditional branching section of this document for more information about the show and hide question feature.

2.1.3.1. Hide this question if

This setting is used to hide the current question based on choices to a previous question.

2.1.3.2. Show this question if

This setting is used to show the current question based on choices to a previous question. When this is used, question is initially hidden on the form, and only shown once the user select the appropriate option in the question chosen.

Show question may override the hide question, so don't use both for the same question.

2.1.3.3. Terminate options

Used with either radio or checkbox question types, this allows you to immediately terminate the survey if a particular option is selected.

2.1.3.4. Terminate URL

Used in conjunction with terminate options, this allows you to immediately redirect to a different URL if one of the above terminate options are selected, rather than showing the thank you page.

2.1.4. Advanced Tab

This tab contains some more complex settings that give you more flexibility as to the behaviour of your survey.

2.1.4.1. Suppress Question

This is used to hide the text of the question.

2.1.4.2. CSS Class

This will append a CSS class suffix to your question, which allows you to alter the appearance of the question.

2.1.4.3. Field Type

This is the type of field that is created in your MySQL database table. The default of TEXT will work for any question type, but is not particularly efficient. In some cases you may wish to choose a specific field type such as INT.

2.1.4.4. Field Size

If used with non-text field type, it will control the size of the field. For example, if varchar field type is used and field size is set to 100, the field created in your database will be varchar(100).

When used with a text question type, this will control the width of the field. It can also be used to limit the number of characters entered in a field, for example if you only want a 3 digit number entered.

2.1.4.5. Validation Type

When question is set to mandatory, this controls the type of validation used for this field. The options available will differ depending on the question type chosen.

2.1.4.6. Field Titles

This is used with the rating question type

2.1.4.7. Field Total

How many columns of radio buttons do you want when using the rating question type.

2.1.4.8. SQL

Used for the SQL question type.

For example:

```
SELECT name, id FROM `rxlct_accountmanagers`
```

2.1.4.9. SQL Key Field

This field will be used for the text of the options

For example:

name

2.1.4.10. SQL Value Field

This field will be used for the value of the options, and will be what is actually stored in your database.

For example:

id

2.1.4.11. Horizontal Label

Used for the radio question type to allow options to be next to each other rather than one underneath each other.

Warning

DO NOT use this setting when you have lots of options.

2.1.4.12. Option Prefix

This text will appear BEFORE each option for a radio or checkbox question.

2.1.4.13. Option Suffix

This text will appear AFTER each option for a radio or checkbox question.

2.1.4.14. _OTHER_ Prefix

When using the _OTHER_ option, this text will appear BEFORE the text input field for a radio or checkbox question.

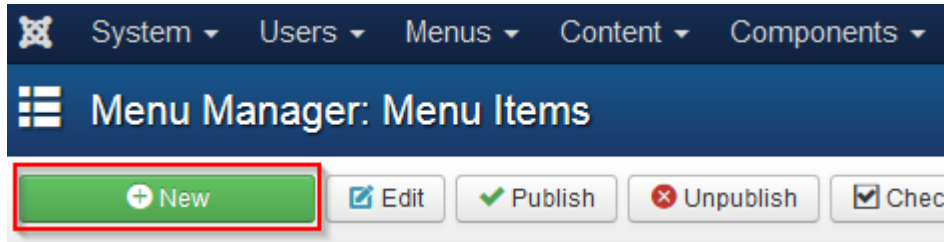
2.1.4.15. _OTHER_ Prefix

When using the _OTHER_ option, this text will appear AFTER the text input field for a radio or checkbox question.

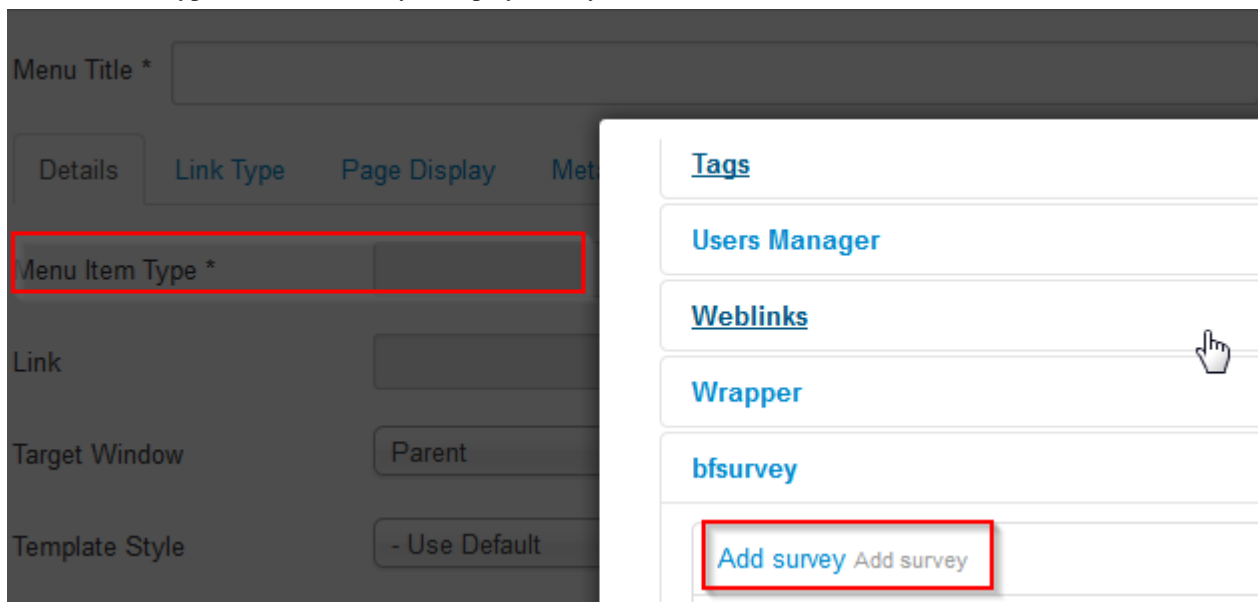
3. Adding your survey menu item

You can add a menu item to give your users an easy way to access the survey.

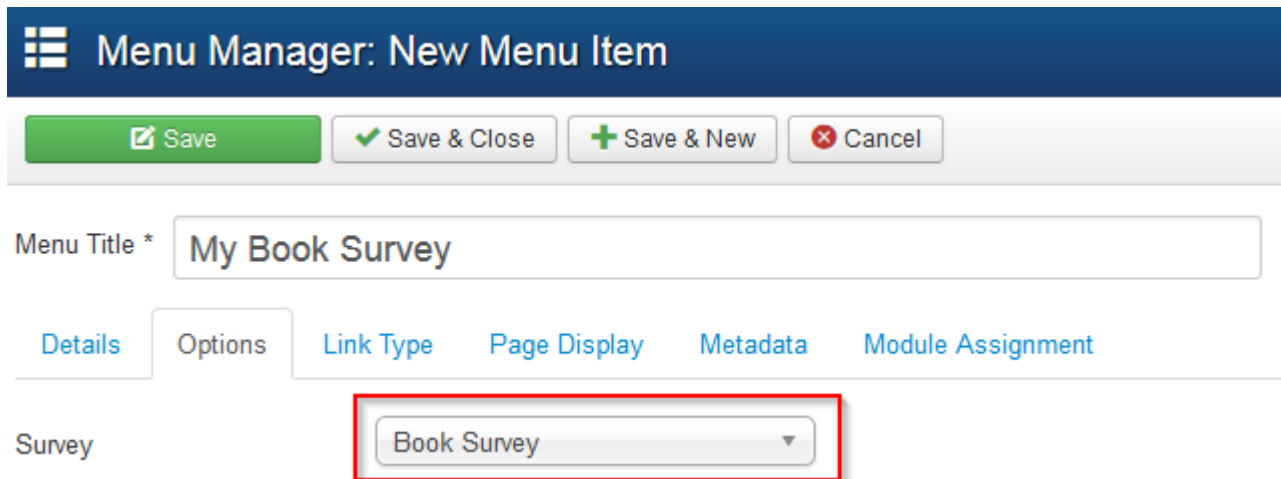
Within menu manager, press New button



For menu item type, select BF Survey->Display Survey



Give the survey a title, and select the survey category.



Chapter 4. Component Options

1. Survey Options

The image settings are used when using the attachment field type.

Maximum image width:Width that jpg, gif or png is resized to.

Maximum image height:Height that jpg, gif or png is resized to.

Thumbnail image width:Width of thumbnail generated when uploading jpg, gif or png.

Thumbnail image height:Height of thumbnail generated when uploading jpg, gif or png.

Max image size:Total maximum size of all attachments on your form. Should not exceed your php max_upload_size.


Save History:Do you want content versioning turned on?

Maximum versions:When save history is turned on, how many versions do you want to retain?

Encrypt form:This forces the form submission to use SSL

Do not store results:When set to yes, data is immediately deleted once the notification email is sent. For more information, refer to Advanced features -> Protecting Personal Information - do not store data.

Debug:When set to yes, extra information is shown which may help with troubleshooting issues.



Configure BF Survey

SYSTEM

Global Configuration

COMPONENT

Banners

BF Survey

Cache Manager

Check-in

Contacts

Articles

Smart Search

Installation Manager

Joomla! Update

Language Manager

Media Manager

Menus Manager

Messaging

Module Manager

Newsfeeds

Survey Options

Permissions

Default settings used for all surveys in this component.

Maximum image width

Maximum image height

Thumbnail image width

Thumbnail image height

Max image size

Save History

Maximum Versions

Debug

2. Permissions

You shouldn't need to adjust any of these default permissions, with the exception of "Access Administration Interface" if you have administrators with limited back end access to your site.

Configure: Which group of users can access these component options and permissions.

Access Administration Interface: Who can access the back end of the component.

Create: Who can create Survey Categories, Questions, Email templates and reports. Setting to denied will remove access to the new button.

Delete: Who can delete Survey Categories, Questions, Email templates ,reports and responses. Setting to denied will remove access to the delete button.

Edit: Who can edit Survey Categories, Questions, Email templates ,reports and responses. Setting to denied will remove access to the edit button.

Edit State: Who can publish and unpublish Survey Categories, Questions, Email templates ,reports and responses. Setting to denied will remove access to the publish and unpublish buttons.

[Survey Options](#)[Permissions](#)

Default permissions used for all content in this component.

Manage the permission settings for the user groups below. See notes at the bottom.

Public	Action	Select New Setting ¹
– Guest	Configure	<input type="text" value="Inherited"/>
– Manager	Access Administration Interface	<input type="text" value="Inherited"/>
– – Administrator	Create	<input type="text" value="Inherited"/>
– Registered	Delete	<input type="text" value="Inherited"/>
– – Author	Edit	<input type="text" value="Inherited"/>
– – – Editor	Edit State	<input type="text" value="Inherited"/>
– – – – Publisher		
– Super Users		



Chapter 5. Email Template

1. Survey Emails

If you would like your survey to trigger email notifications, you first need to set up an email template.

Each survey will require it's own email template

1.1. Email Template Tab

Category:Select the survey that this email template applies to.

Email Type:Used to give visual indication in the view that this email is for end user (author), site administration (admin) or email invite.

Send email to:Email address that this email is sent to. You can include multiple email addresses separated with a comma.

Send email to Group:Which Joomla group of users would you like to send this email to. This can be useful for email invites.

Email Subject:Subject used on the email. You can insert fields from the survey in the form {myfield}.

Email Body:This is the text that is included in the email body. You can insert fields from the survey in the form {myfield}.

You can include {url} to generate a link to your survey.

For email invites, you can include {uurl} to generate a unique url for each user which contains an encrypted version of their username, such as 3f5186e4ae33a33185faf2a141f4e3dc

Note that {uurl} will only work for the Send Email Now button, not the event triggered emails.

1.2. Email Trigger Tab

Email Trigger:Event that will trigger this email to be sent. Default is initial save, which triggers once the user has completed the survey. Manually send should be used for email invites when using the "Send Email Now" button.

Field changes is used when the survey is edited and the value of a field is altered, for example you may want to be notified whenever the comments field is updated in a survey record. To use this you must turn on Save History in your component options.

Field has specific value can be used either on initial save to only trigger the email under certain circumstances, or whenever the survey is updated and a field is changed to a specific value. In the second case, you must turn on Save History in your component options.

Condition:This is the field that we are looking at when using field changes or field has specific value.

Criteria:This is the way we are matching the field that we are looking at when using field has specific value.

Condition:This is the value of the field that we are looking at when using field has specific value.

Send Email Now button is used when sending email invites, rather than have an event trigger.

Chapter 6. Advanced features

1. Conditional Branching

If you want different questions to be presented to the user based on the answers they give, you can use the show/hide question feature. In BF Survey Plus conditional branching was achieved using the next question id, but the new version BF Survey does things a bit differently.

In each question you will now see the "Hide this question if" and "Show this question if" fields on the visibility tab, and this controls when a question is shown or hidden. By default, all questions are shown.

This feature is designed to work with radio or checkbox question as the prior question that triggers the show/hide.

The screenshot shows the 'BF Survey – Edit Question' interface. At the top is a dark blue header with the title. Below it is a toolbar with five buttons: 'Save' (green), 'Save & Close' (green with checkmark), 'Save & New' (green with plus), 'Cancel' (red with X), and 'Versions' (blue with document icon). Below the toolbar are four tabs: 'Details', 'Options', 'Visibility' (selected), and 'Advanced'. Under the 'Visibility' tab, there are two rows of conditional logic. The first row is 'Hide this question if' followed by a dropdown menu showing 'PLEASE SELECT', an equals sign, and a text input field containing 'Select some options'. The second row is 'Show this question if' followed by a similar dropdown menu, equals sign, and text input field.











Warning

For multipage surveys, each page must have at least one question that is always visible. You can get round this issue by grouping questions using the parent item.

The DB Field Name for questions used with show/hide must not end in a number. You can put an underscore at the end to avoid this issue.






Questions that are sometimes hidden and sometimes shown cannot be set as mandatory. Only questions that are always visible can be set to mandatory.

As an example, we will assume that we are interested to know the number of birds that a person owns. Obviously this question is only relevant to people who own birds, so we don't want to show this to everyone. In this scenario, we have two questions grouped onto the same tab using a heading question, and the second question "How many birds do you have?" will be only visible when the person indicates that they like birds.

		Enabled	Question
			Questions
			-- -- What is your favourite pet?
			-- -- How many birds do you have?

On the visibility tab for the "How many birds do you have?" question, we select the "What is your favourite pet" question in the show field, and select the option of bird. Initially this question will be automatically hidden, and it will now only be shown if the user selects the bird option in the previous question.

BF Survey – Edit Question

 Save  Save & Close  Save & New  Cancel  Versions

Details Options **Visibility** Advanced

Hide this question if

PLEASE SELECT ▼ = Select some options

Show this question if

- What is your favourite pet? ▼ =

Bird x

As you can see, initially the second question is hidden.

[Details](#)

[Questions](#)

Questions

What is your favourite pet?

- ☐ Dog
- ☐ Cat
- ☐ Guinea Pig
- ☐ Bird

Submit form

The second question is still hidden when the user selects "Dog" and "Guinea Pig", as they don't match the show criteria.

[Details](#)

[Questions](#)

Questions

What is your favourite pet?

- ☒ Dog
- ☐ Cat
- ☒ Guinea Pig
- ☐ Bird

Submit form

Now that the "Bird" option is selected, the second question becomes visible. This is regardless of the other options selected. This is all done using javascript, so the question immediately appears without the need of form submission.

Details Questions

Questions

What is your favourite pet?

☒ Dog

☐ Cat

☒ Guinea Pig

☒ Bird

How many birds do you have?

The hide feature works in a similar way, except it will initially show the question by default, and only hide it when specific options are selected in a different question.

Warning

Show question may override the hide question, so don't use both for the same question.


2. Using Recaptcha

Joomla has the ability to display a Captcha on a form to avoid spammers writing scripts to automatically submit your form. The core Joomla currently includes Recaptcha, which is a popular service provided by google.

To enable Recaptcha on your site, first enable the "Captcha - Recaptcha" plugin on your site.

☒ [Captcha - ReCaptcha](#)

Make sure you enter your public and private key, which you can get for free at <http://www.google.com/recaptcha>

 **Plugin Manager: Captcha - ReCaptcha**

Plugin

Captcha - ReCaptcha

captcha / recaptcha

This CAPTCHA plugin uses the reCAPTCHA service to prevent spammers while it helps to digitize books, newspapers and <http://www.google.com/recaptcha>. To use this for new account registration, go to Options in the User Manager and select

Public Key *	<input type="text" value="6Ld...of-a!"/>
Private Key *	<input type="text" value="6Ld...vulwe"/>
Theme *	<input type="text" value="Clean"/>

In your site's global configuration, set Captcha - ReCaptcha as the default captcha.

Default Captcha *	<input type="text" value="Captcha - ReCaptcha"/>
-------------------	--

Then in your survey category, set use captcha to Yes.

Use Captcha	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
Enable Captcha verification	

You should now see Recaptcha appearing on your site. If it does not appear, make sure you are using Joomla 3.2.1 or higher, as the URL used by Recaptcha changed and older versions of Joomla need to be patched to make ReCaptcha work <http://seepeoplesoftware.com/blog/231-joomla-recaptcha-fix.html>

Details

Questions

Name *

Your Email *

Please enter the code *

have unistar

Type the text

[Privacy & Terms](#)

Submit form

3. Pre-populate fields on the form via URL

When a survey form is first loaded, you can pre-populate some of the responses via URL parameters. Simply append to the URL in the format `&fieldname=yourdata`, for example `&Name=Tim&Company=Tamlyn Software`

Forms that have already been saved will not pre-populate from the URL.

For unique URL email invites that include an encrypted version of the username such as `3f5186e4ae33a33185faf2a141f4e3dc`, these are automatically decrypted and the Name and Email address fields are automatically populated.

4. Protecting Personal Information - do not store data

Under the Australian Privacy Principles or similar laws, there may be a requirement to protect personal information and not store data collected on the Joomla website.

In the component options is a setting "Do not store results", which if set to yes will delete the data collected once the notification email has been sent immediately after the form has been submitted. Obviously you'll need to include the fields in the email template so that you can obtain the information completed in the form.

Additionally there is a "Encrypt form" setting, which will force the form submission to use SSL.

Warning

If you use the "Do not store results feature", you will not be able to use the results, reporting or stats areas of this component as there will be no data to display.

Chapter 7. Results

The results section in the back end can be used to view/edit/delete individual survey responses. You can also add a front end view to see all responses in a specific category.

1. Results Category

You must select the survey category for which you wish to view the results of.

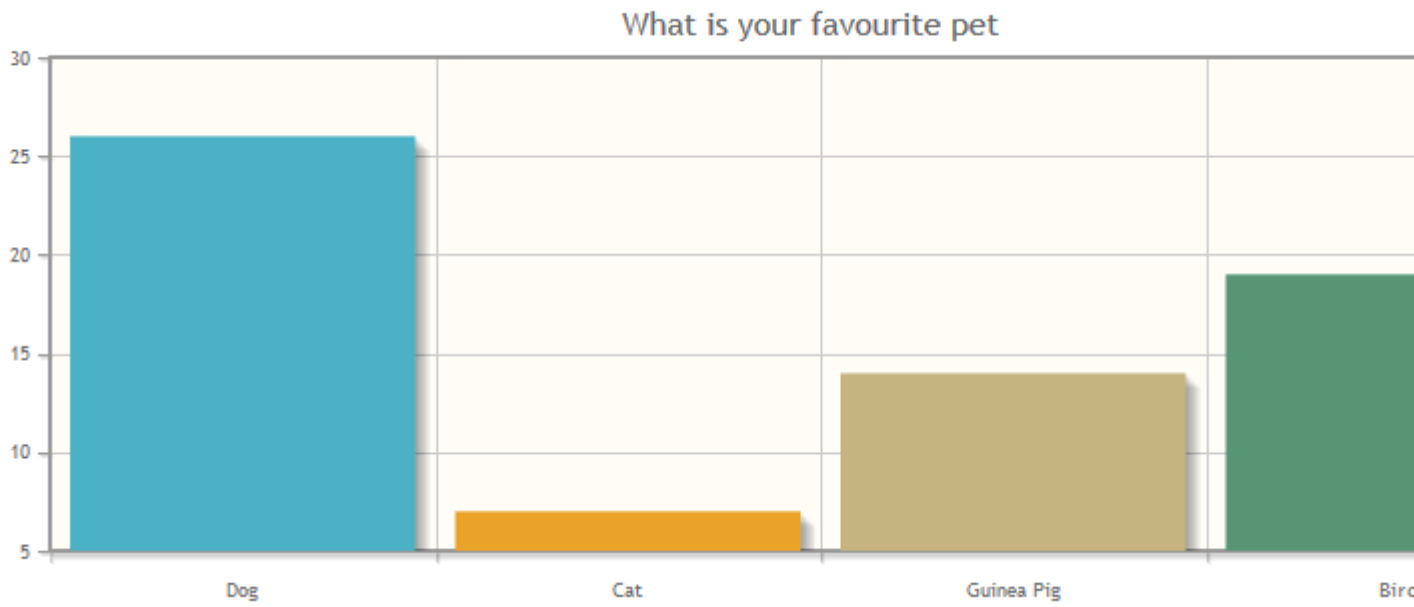
2. Result

Click on the record to view/edit the individual survey response. To delete a response, select the response(s) and press the delete button. Delete is immediate, there is no trash.

Chapter 8. Statistics

The statistics section in the back end will show a graphical representation of the combined survey responses so far. You can also add a front end view to see all stats for a specific category.

Note that not all question types are currently supported in the statistics view



Chapter 9. Reports

1. Creating Reports

Click the new button to create a new report. Once you've completed the report criteria, save the report, then you can view in modal window, generate and download a PDF, or export to CSV.

1.1. Details

Category:This is the survey category that this report applies to.

Report Title:This is the name of your report, and by default is shown at the top of your report.

Status:Is report published or unpublished.

Description:Text box that allows you to describe what this report does. This information is now shown on the report.

Template:Advanced feature that allows you to customise the output of the report. Can be left blank for default report.

Template Cover Page:Advanced feature that allows you to customise the output of the report. Cover page is the first page in the PDF output which can be different to the rest of the report. Can be left blank for default report.

Template Header:Advanced feature that allows you to customise the output of the report. Template header is shown on the top of each page, and can be used to insert logo etc. Can be left blank for default report.

Template Footer:Advanced feature that allows you to customise the output of the report. Template footer is shown at the bottom of each page. Can be left blank for default report.

Separate Pages per row:Advanced feature that allows you to customise the output of the report by having a separate PDF page for each record. This feature only works in conjunction with the other advance template features.

Filename:This the the filename of the PDF output of the report. You can leave blank for the default filename.

1.2. Include the following

Fields:These are the fields that will be shown in the report. The order you add them will be the order they appear in the report.

Date from:Only survey responses after this date will be included in your report.

Date to:Only survey responses before this date will be included in your report.

1.3. Selection Criteria

Condition:Field that will be used as part of the selection criteria.

Criteria:How we are matching the field selected above in the condition.

Condition:Value we are matching of the condition field.

Operator:Used when we want to examine two fields as part of the seleciton criteria.

1.4. Advanced

Custom Query:This allows you to completely control the SQL query used by the report. If this field is used, the other selection criteria above is ignored.

2. Generating Reports

Press the action icon to view in modal window, generate and download a PDF, or export to CSV.

3. Report Templates

Templates are used to adjust the PDF output of the report.

Here is an example of a simple report, where we have given the report a title, selected two fields, and defined a date range for the report.

BF Survey – Edit report

Save Save & Close Save & New Cancel

Details

Category * Example

Report title * Favourite Pet Report

Status Published
Set publication status.

Description
Please describe your report

Include the following

Fields favourite_pet_x how_many_do_x

Please select the fields you would like to see in your report

Date from 2013-12-17 05:00:00
Records before this date will not be included.

Date to 2014-03-26 05:00:00
Records after this date will not be included.

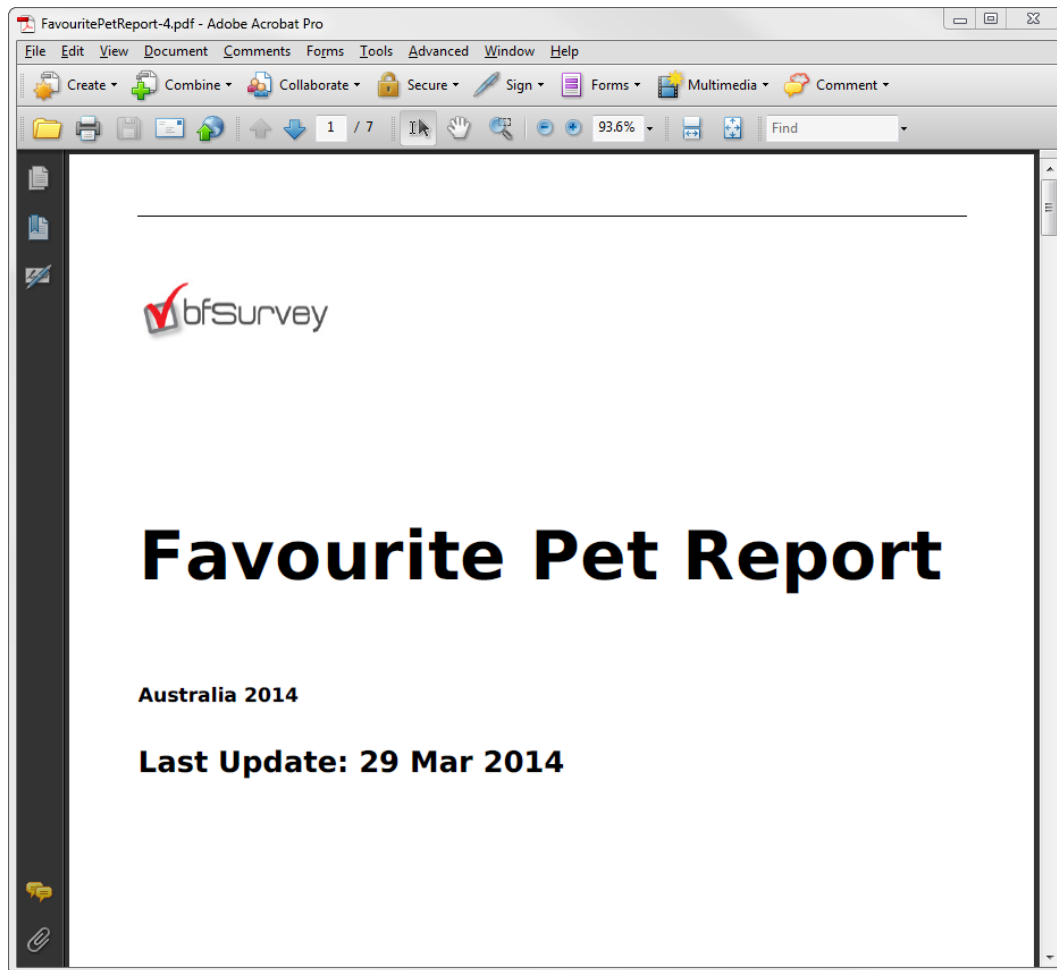
As you can see, the default PDF output shows all the records combined in a table.

Favourite Pet Report

Start Date: 2013-12-16 18:00:00 End Date: 2014-03-25 18:00:00

favourite_pet	how_many_do_
Dog	2
Dog,Cat	5
Dog,Bird	3
Dog,Guinea Pig,Bird	3
Guinea Pig,Bird	4
Guinea Pig,Bird	2
Guinea Pig,Bird	2
Dog,Bird	2
Dog,Bird	2
Dog,Bird	1
Dog,Bird	1
Dog,Bird	1
Dog,Bird	2
Cat,Guinea Pig	2
Cat,Guinea Pig	2
Cat,Guinea Pig	2
Dog,Cat	2
Dog	2
Dog	2
Dog	2
Dog	2
Dog	2
Dog,Bird	2

Sometimes you want a coverpage for your report, for example:



This can be achieved using the Template Cover Page field

Template Cover Page

```

<br>
<br>
<br>
<br>
<br>
<p style="font-size: 42pt; font-family: arial, helvetica, sans-serif;
font-weight: bold;">Favourite Pet Report</p>
<p style="font-size: 12pt; font-family: arial, helvetica, sans-serif;
font-weight: bold;">Australia 2014</p>
<br>
<br>
<br>
<br>
<br>
<p style="font-size: 18pt; font-family: arial, helvetica, sans-serif;
font-weight: bold;">Last Update: {date}</p>
```

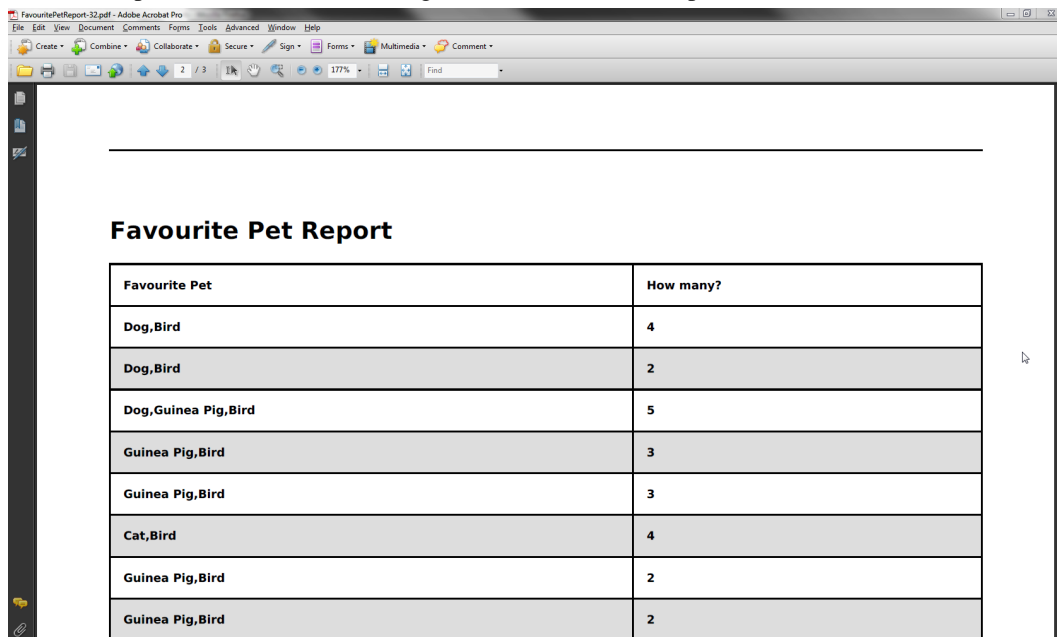
This will be included on the first page of the report output

Warning

TCPDF that is used for the PDF generation only allows very basic HTML and CSS, so you are somewhat limited as to the formatting allowed.

You can insert {date} to include the date that the PDF was generated on.

You can make the report look even fancier using the other advanced template fields.



The screenshot shows a PDF report titled "Favourite Pet Report" generated by Adobe Acrobat Pro. The report contains a table with two columns: "Favourite Pet" and "How many?". The table lists various pet combinations and their counts.

Favourite Pet	How many?
Dog,Bird	4
Dog,Bird	2
Dog,Guinea Pig,Bird	5
Guinea Pig,Bird	3
Guinea Pig,Bird	3
Cat,Bird	4
Guinea Pig,Bird	2
Guinea Pig,Bird	2

The above is achieved with the following settings.

Template

```
<tr>
<td width="60%">[favourite_pet]</td>
<td width="40%">[how_many_do_]</td>
</tr>
```

Template used for report. Leave blank for default layout.

Template Header

```
<style type="text/css">
td{
    font-size: 24px;
    margin-left: 5px;
}
</style>
<h1>Favourite Pet Report</h1>
<hr>
<table class="TFtable" border="1" cellpadding="10">
<tr>
<td width="60%"><strong>Favourite Pet</strong></td>
<td width="40%"><strong>How many?</strong></td>
</tr>
```

This will be included on every page of the report at the top

Template Footer

```
</table>
```

This will be included on every page of the report at the bottom

Fields in your answer table that you want inserted into your report should be enclosed in square brackets, for example [favourite_pet]

Chapter 10. Upgradeing

1. How to upgrade

You can upgrade the software by installing a new version over the top. You should not loose any data, however it is best practice to perform a full site backup before applying any update. I recommend using Akeeba Backup.

To update from within Joomla, you need to enter your Download ID in the component options. You can obtain your Download ID by logging into <http://www.tamlynsoftware.com/>, and clicking on the my subscriptions page.

Warning

Only those with a valid subscription will be able to access software updates.

Also note that if you change your password on <http://www.tamlynsoftware.com/>, you will need to obtain a new Download ID.

Once you have entered your download id, you can either use the liveupdate within the component, or use the Joomla updater.

Chapter 11. Maintenance

1. Backup database tables

Press this button to download an SQL export of the database tables used by BF Survey.

2. Auto database cleanup

Used to delete fields from your answer table that no longer have an associated question.

Warning

Auto database cleanup may delete any data within these fields that don't have associated questions. It is recommended that you do a backup first just in case.

3. Import data from BF Survey Plus

If you are an existing BF Survey Plus user, you may wish to migrate your data across to the new version.

This button will only be visible if you have BF Survey Plus installed on the same site.

Warning

Warning, this is a destructive exercise and once you migrate the data you will no longer be able to use BF Survey Plus on that site (without reinstalling). It is recommended that you do a full site backup before pressing this button. Also it is recommended that you only use this button on a staging site, not on your live website.

Warning

Warning, this Does not import your menu items settings (which are now located in the category table), so you will need to edit your category and set survey title etc after the import is complete.

The screenshot shows the 'BF Survey: Maintenance' interface. At the top, there is a dark blue header with the title 'BF Survey: Maintenance'. Below the header is a navigation bar with buttons: 'New' (green), 'Edit' (blue), 'Publish' (green), 'Unpublish' (red), 'Delete' (red), and 'Back' (blue). Below the navigation bar is a horizontal menu with links: 'Control Panel', 'Survey Categories', 'Question Manager', 'Email Template', 'Results', 'Reports', and 'Maintenance' (highlighted in blue). Below the menu is a light blue warning box with the text: 'WARNING: Auto database cleanup may delete any data within these fields that don't have associated questions. It is recommended that you do a backup first just in case. Are you really sure you want to do this?'. Below the warning box is a section titled 'Database backup This allows you to download all the database tables used by BF Survey.' with a blue button labeled 'Backup database tables'. Below this is a section titled 'Database clean up: This will identify any fields in your answer tables that do not have any associated questions, and will automatically delete them.' with an orange button labeled 'Auto database cleanup'. Below this is a section titled 'Import data from BF Survey Plus This button will remove all existing categories and questions, and import them from BF Survey Plus' with a button labeled 'Import BF Survey Plus data' that is highlighted with a red rectangle.

Pressing this button will do the following:

- Rename your existing jos_bfsurvey_questions to jos_bfsurvey_questions.old (just in case you need any of your current questions)
- Add additional fields to jos_bfsurvey_plus
- Transform several fields in jos_bfsurvey_plus to their new name including id, catid, state, question, alias, sqlfield, created, modified
- Rename jos_bfsurvey_plus to jos_bfsurvey_questions
- Import your categories from jos_categories into jos_bfsurvey_categories
- Update the category id in jos_bfsurvey_questions
- Rename your answer table from the format jos_bfsurveyplus_34 to jos_bfsurvey_34results
- Add missing fields to jos_bfsurvey_34results, and rename some existing ones
- Adds an entry to jos_content_types for each category
- Renames jos_bfsurveyplus_email to jos_bfsurvey_emailitems

As you can see, this button does quite a lot, and it's probably not going to work on every site. Use at your own risk.

3.1. Manual import

In the event of the above import failing, there may be a need to perform some of the steps manually. You can see all the import code in /administrator/components/com_bfsurvey/models/maintenance.php in the import function.

Here are the MySQL commands used to at least bring across your questions. Obviously replace #__ with your database table prefix such as jos_

```
RENAME TABLE `#__bfsurvey_questions` TO `#__bfsurvey_questions.old`;
```

```
ALTER TABLE `#__bfsurvey_plus` ADD `value_field` varchar(25) NOT NULL, ADD `hide_question` int(11) NOT NULL, ADD `hide_options` text, ADD `show_question` int(11) NOT NULL, ADD `show_options` text, ADD `default_value` varchar(255) NOT NULL, ADD `locked_by` bigint(20) NOT NULL DEFAULT '0', ADD `locked_on` datetime NOT NULL DEFAULT '0000-00-00 00:00:00', ADD `myclass` varchar(255) NOT NULL;
```

```
ALTER TABLE `#__bfsurvey_plus` CHANGE `id` `bfsurvey_question_id` bigint(20) unsigned NOT NULL AUTO_INCREMENT;
```

```
ALTER TABLE `#__bfsurvey_plus` CHANGE `catid` `bfsurvey_category_id` bigint(20) NOT NULL;
```

```
ALTER TABLE `#__bfsurvey_plus` CHANGE `state` `enabled` tinyint(3) NOT NULL DEFAULT '1';
```

```
ALTER TABLE `#__bfsurvey_plus` CHANGE `question` `title` varchar(255) NOT NULL;
```

```
ALTER TABLE `#__bfsurvey_plus` CHANGE `alias` `slug` varchar(50) NOT NULL;
```

```
ALTER TABLE `#__bfsurvey_plus` CHANGE `sqlfield` `key_field` varchar(25) NOT NULL;
```

```
ALTER TABLE `#__bfsurvey_plus` CHANGE `created` `created_on` datetime NOT NULL DEFAULT '0000-00-00 00:00:00';
```



```
ALTER TABLE `#__bfsurvey_plus` CHANGE `modified` `modified_on` datetime NOT NULL DEFAULT  
'0000-00-00 00:00:00';
```

```
UPDATE #__bfsurvey_plus SET value_field=key_field;
```

```
RENAME TABLE `#__bfsurvey_plus` TO `#__bfsurvey_questions`;
```