

OPTICK

PRIVATE SURVEY AND RESEARCH PLATFORM

What this guide covers

- First boot and first login
- Create, activate, and share surveys
- Email, security, backup, and support

Release build

Platform: Ubuntu 24.04

Survey engine: LimeSurvey Community Edition 7.0.5

Runtime: Nginx, PHP 8.3, MariaDB 11.8

Default access: Public IPv4 over HTTP on port 80

Customer Quick Start and Operations Guide

A private AWS-hosted survey and feedback workspace powered by LimeSurvey Community Edition

1. Start Here

This AMI creates a new private survey workspace in your AWS account. On the first boot, it automatically creates the LimeSurvey database, generates a new administrator password, starts the application, and writes a customer-only login file to the Ubuntu account.

Your initial password is generated for your instance.

The first-login password is not shared across customers and is not stored in this guide. Retrieve it from your own EC2 instance after first boot.

Before you begin

Item	What you need
EC2 instance	A running instance launched from the Optick AMI. A t3.medium is a practical starting point for typical internal surveys and modest respondent volume.
Public IPv4	Enabled on the EC2 instance for the default quick-start access method.
Security group	HTTP TCP 80 from the intended survey audience. SSH TCP 22 from your own administrator IP address only.
EC2 key pair	Required for SSH access. SSH password authentication is disabled.
Browser	A current desktop or mobile browser for LimeSurvey administration and respondent testing.

Protect sensitive data before collecting it.

The default quick start uses HTTP on the instance public IPv4 address. Before collecting personal, confidential, regulated, health, payment, or other sensitive information, use a customer-controlled HTTPS/TLS endpoint and a suitable DNS name, or restrict access appropriately. Do not transmit sensitive data over HTTP.

First boot: wait for the workspace to become ready

1. Launch the EC2 instance with a public IPv4 address and the security-group rules described above.
2. Allow the automatic first boot to complete. Do not manually start or reinstall the application.
3. SSH to the instance with your EC2 key pair and the 'ubuntu' user."
4. Run the status command below. When it reports healthy containers and local health, the workspace is ready.

```
sudo optick-survey-status
```

The first boot normally generates the database and administrator account automatically. On a small instance, allow several minutes before concluding that startup has failed.

2. Sign In and Secure Your Administrator Account

Retrieve your private access details

```
cat /home/ubuntu/FIRST_LOGIN.txt
```

The file displays the current public URL, the initial administrator user name, and the generated password. It is readable only by the Ubuntu account on your instance.

Open the administration workspace

```
optick-survey-url
# Then open the displayed URL with /admin appended
```

Example format: `http://YOUR_PUBLIC_IPV4/admin`

Sign in with the username and password shown in `FIRST_LOGIN.txt`.

Perform these security actions immediately

1. Change the initial administrator password. In LimeSurvey, select your user name in the upper-right area, open Your Profile, select Change password, then save the profile.
2. Replace the placeholder administrator email address with a working address that your team controls.
3. Create separate named administrator or survey-manager accounts for other people instead of sharing the initial admin account.
4. Store the initial password securely, then remove any local copies you no longer need. The original FIRST_LOGIN.txt remains available on the instance for recovery until you choose to remove it.

LimeSurvey supports changing a user password and email through user/profile management. See the official User Management and First Login resources at the end of this guide.

3. AWS Network and Security Basics

The AMI exposes only the web application over port 80 by default. MariaDB and PHP-FPM stay inside the Docker network and must not be opened to the internet.

Port	Use	Recommended inbound source
22 TCP	SSH administration	Your fixed public IP or your organization VPN range only.
80 TCP	Default web survey and administration access	Survey audience or 0.0.0.0/0 and ::/0 when the survey is intentionally public.
443 TCP	HTTPS	Open only after you configure and validate a TLS endpoint. It is not required for the default launch.
3306 TCP	MariaDB database	Do not open. The database is private to the application Docker network.
9000 TCP	PHP-FPM	Do not open. Internal application service only.
23 TCP	Telnet	Do not open. The product does not use Telnet.

4. Create Your First Survey

A survey requires a survey definition, at least one question group, and at least one question before it can be activated.

Create the survey

1. From the LimeSurvey dashboard, select Create survey.
2. Enter the survey title, base language, and any desired general settings.
3. Save the survey.
4. Open the survey Structure area.
5. Select Add question group and give the group a clear title.
6. Within the question group, select Add question. Choose a question type, enter the question text, set the required option as appropriate, and save.

Preview before activation

Use the survey preview to test question wording, branching, display logic, required fields, and the mobile experience. Preview is not the same as a live survey: respondents cannot submit permanent responses until the survey is activated.

Use logic and question design deliberately

- Use short, neutral wording and one concept per question.
- Use required questions carefully. Required answers can improve completeness but may reduce completion rates.
- Use conditions or relevance logic for branching when a question applies only to some respondents.
- Test your full question flow in a private browser session before sending it to participants.

5. Activate and Share a Survey

Activate the survey

1. Open the survey, then choose Settings and Overview.
2. Select Activate this survey.
3. Review the activation options, then select Save and activate survey.
4. Choose the access mode that fits your project.

Access mode	Best use	What it means
Open access	Public feedback, general research, anonymous surveys	Anyone with the survey link can view and complete the survey. You can distribute the public link or QR code.
Closed access	Invited panels, controlled respondents, one response per participant	Participants use unique tokens. Manage recipients through the Survey Participants area and configure email first.

Validate your respondent experience

1. Open the activated public survey link in a private or incognito browser window.
2. Complete and submit a test response.
3. Confirm that the Thank You page appears.
4. Return to LimeSurvey administration and confirm the response is visible before distributing the link widely.

6. Responses, Reporting, and Participant Privacy

After activation, LimeSurvey provides response and statistics tools within the selected survey. Use these tools to review completion status, response data, and exports.

- Use survey-level participant settings when you need anonymous responses, participant registration controls, or invitation-based access.
- Use Survey Participants for closed-access campaigns and unique respondent tokens.
- Use response exports only in accordance with your organization's privacy, retention, and access-control policies.
- Limit administrator access to people who need it. Create distinct accounts and survey permissions for collaborators.

7. Configure Email Before Invitations

The AMI does not include a third-party mail provider or a preconfigured SMTP relay. Configure a customer-controlled email service before sending invitations, reminders, confirmations, or password-reset messages.

1. In LimeSurvey administration, open Configuration, then Settings, then Global settings.
2. Open the Email settings section.
3. Enter your approved SMTP or OAuth email-provider settings and a sender address your organization controls.
4. Save the settings and send a controlled test message before starting a participant campaign.
5. Set the survey administrator and bounce-address settings appropriately for each survey.

8. Operations and Health Checks

Task	Command	Expected result
Show current public URL	optick-survey-url	Displays the current public IPv4 HTTP address.
Show application status	sudo optick-survey-status	Shows container state and local Nginx health.

Task	Command	Expected result
Read first-login details	<code>cat /home/ubuntu/FIRST_LOGIN.txt</code>	Shows initial URL, user name, and generated password.
Check first boot if startup is slow	<code>sudo systemctl status optick-survey-firstboot.service --no-pager</code>	Shows whether automatic setup is running, complete, or failed.
Check product service	<code>sudo systemctl status optick-survey.service --no-pager</code>	Shows whether the application stack was started.

Maintenance and backups

The survey database uses a persistent Docker volume, and application data uses persistent host storage under `/var/lib/optick-survey`. Plan backups before production use.

- Use AWS Backup or EBS snapshots on a schedule that matches your recovery needs.
- Take backups during a maintenance window or after stopping the product service for the most consistent recovery point.
- Test your recovery process on a separate EC2 instance before relying on it.
- Do not delete Docker volumes or the `/var/lib/optick-survey` directory unless you intend to destroy application data.

```
sudo systemctl stop optick-survey.service
# Perform your approved snapshot or backup procedure
sudo systemctl start optick-survey.service
```

9. Troubleshooting

Symptom	Check first	Recommended action
The browser cannot reach the site	Public IPv4 and port 80 rule	Confirm the instance has a public IPv4 address, TCP 80 is allowed by the security group, and the URL is <code>http://PUBLIC_IPV4/admin</code> .
First boot seems slow	First-boot service	Run <code>sudo systemctl status optick-survey-firstboot.service --no-pager</code> . Allow several minutes for database initialization.
Admin login fails	FIRST_LOGIN and password changes	Use <code>cat /home/ubuntu/FIRST_LOGIN.txt</code> . If you already changed the password, use the changed password instead of the initial one.
Public survey link shows an error	Survey activation and share link	Confirm the survey is activated. Copy the participant link from Share your survey instead of using Preview.
Invitation emails do not arrive	Global Email settings	Configure and test your SMTP or OAuth provider. Verify the sender address, provider access, and spam filtering.
Status command reports a failure	Container and service state	Run <code>sudo optick-survey-status</code> , then check <code>sudo systemctl status optick-survey.service --no-pager</code> .

10. Official Resources and Support

Use the official resources below for detailed LimeSurvey administration guidance. For product-specific assistance, use the Support contact shown on the AWS Marketplace listing.

- [LimeSurvey Documentation](#)
- [Create a Survey](#)

- [Question Groups](#)
- [Activate a Survey](#)
- [Survey Participants](#)
- [Manage Users](#)
- [Global Settings](#)
- [AWS Security Groups](#)