Running a BOS Survey

The following 3 sections will help you design, distribute and view/analyse your survey and its results.

If you are relatively new to running a survey thinking of a simple analogy, such as an invitation to a wedding or birthday celebration, may help you to relate more easily to the 3 broad sections:

- **Design** – The layout and content of your invitation card (graphical and textual).
- **Distribute** – Getting your invitation to your potential guests.
- **View/Analyse** – Examine your responses in detail, eg number of acceptances, number of adults attending, number of children attending, number of males attending, number of females attending, etc.

A simple survey will require reference to fewer links in each of the 3 sections than a complex survey. Select the relevant links you require to read further.

If you have any questions thereafter you can:

- Consult the frequently asked questions [https://www.onlinesurveys.ac.uk/category/faq/](https://www.onlinesurveys.ac.uk/category/faq/)
- Ask the Survey Service staff [LLC-Surveys@dundee.ac.uk](mailto:LLC-Surveys@dundee.ac.uk)
- Ask your School Liaison Librarian [http://www.dundee.ac.uk/library/ liaison/](http://www.dundee.ac.uk/library/ liaison/)
1  DESIGN YOUR SURVEY: Overview and Links

You are ready to start designing your survey. Points 1.1 – 1.19 provide an overview of the design elements of a BOS survey.

1.1  Creating a new survey

Learn how to:

- Create a new survey from scratch.
- Create a new survey by copying an existing survey.

Read:  https://www.onlinesurveys.ac.uk/help-support/creating-a-survey/

1.2  Customising your survey’s appearance

Learn how to change the look of your survey by:

- Changing its colour scheme.
- Adding a logo.
- Adding a background image.

Read:  https://www.onlinesurveys.ac.uk/help-support/customising-your-surveys-appearance/

1.3  Adding pages, sections and text to your survey

Learn how to start building your survey by:

- Adding pages, sections and text.
- Editing, moving or deleting elements of your survey structure.

Read:  https://www.onlinesurveys.ac.uk/help-support/adding-pages-text-sections/
1.4 **Question types explained**

- Multiple choice (single answer) questions
- Multiple choice (multiple answers) questions
- Selection list questions
- Scale/rank questions
- Free text questions
- Date/time questions
- Creating a grid question

Read: [https://www.onlinesurveys.ac.uk/help-support/question-types/](https://www.onlinesurveys.ac.uk/help-support/question-types/)

1.5 **Adding and editing questions**

Learn how to:

- Add questions to your survey.
- Preview, edit, move, copy and delete a question.
- Convert a question to a different question type.

Read: [https://www.onlinesurveys.ac.uk/help-support/adding-editing-a-question/](https://www.onlinesurveys.ac.uk/help-support/adding-editing-a-question/)

1.6 **Screening out certain respondents**

Learn how to:

- Screen out respondents who do not match certain criteria in your survey to a ‘Thank you’ message providing information on why they have been screened out of your survey.

Read: [https://www.onlinesurveys.ac.uk/help-support/screening-out-certain-respondents/](https://www.onlinesurveys.ac.uk/help-support/screening-out-certain-respondents/)

1.7 **Question routing**

Learn how respondents can skip one or more pages depending on their answer to a question:

- Simple routing
- Complex routing

Read: [https://www.onlinesurveys.ac.uk/help-support/simple-routing/](https://www.onlinesurveys.ac.uk/help-support/simple-routing/)
[https://www.onlinesurveys.ac.uk/help-support/complex-routing/](https://www.onlinesurveys.ac.uk/help-support/complex-routing/)
1.8 **Pre-populating questions**

Learn how to pre-populate your survey with information you already have about individuals or groups:

- Save respondents’ time by automatically filling in their details for them.
- Ask respondents to check and, if necessary, amend details you hold about them.
- Track where respondents have come to your survey from by customising the links you post on different websites, social media sites, etc.
- Lead respondents straight to the route through your survey that is most relevant to them.

Read:  [https://www.onlinesurveys.ac.uk/help-support/pre-populating-questions/](https://www.onlinesurveys.ac.uk/help-support/pre-populating-questions/)

1.9 **Adding contact and copyright information**

Learn how to add:

- Your contact details to your survey.
- A message.
- Copyright information.

Read:  [https://www.onlinesurveys.ac.uk/help-support/adding-contact-and-copyright-information/](https://www.onlinesurveys.ac.uk/help-support/adding-contact-and-copyright-information/)

1.10 **Adding an image**

Learn how to:

- Add an image to your survey.
- Format the image.

Read:  [https://www.onlinesurveys.ac.uk/help-support/adding-an-image/](https://www.onlinesurveys.ac.uk/help-support/adding-an-image/)

1.11 **Adding a video or other media content**

Learn how to:

- Embed a video or other media into your survey.

Read:  [https://www.onlinesurveys.ac.uk/help-support/adding-a-video-or-other-media-content/](https://www.onlinesurveys.ac.uk/help-support/adding-a-video-or-other-media-content/)
1.12 Adding a question to capture the username, email address or token of your respondents

Learn how to activate the BOS email tool and/or allow BOS to keep track of who has and who has not completed your survey.

- Set up a respondent list using survey access control.
- Add a hidden question which captures the username, email address, or token of your respondents.

Read: https://www.onlinesurveys.ac.uk/help-support/capture-the-username-email-address-or-token-of-your-respondents/

1.13 Amending your survey structure

Learn how to amend your survey structure while it is still in the ‘draft’ stage:

- Edit/copy/move/delete a page, section title, note or question.

Read: https://www.onlinesurveys.ac.uk/help-support/amending-your-survey-structure/

1.14 Setting your survey’s completion options

Learn how to:

- Enable survey navigation (backwards and forwards through your survey)
- Allow ‘finish later’ on surveys
- Show survey progress bar
- Hide question numbers (eg, when your survey contains routing logic)
- Show completion receipt
- Permit response printout

Read: https://www.onlinesurveys.ac.uk/help-support/setting-survey-completion-options/

1.15 Previewing, printing and saving your survey as a PDF

Learn how to use the survey preview to:

- Proofread your survey for errors.
- Test the settings and validation for each question.
- Check your page and question order, and the different routes through your survey, if applicable.
- Test survey access control credentials (usernames and passwords), if applicable.

Read: https://www.onlinesurveys.ac.uk/help-support/previewing-printing-saving-your-survey/
### 1.16 Changing your survey language

Translate both the survey navigation and the help and guidance information to the following languages:

- English, Dutch, French, Scottish Gaelic, German, Hungarian, Italian, Polish, Romanian, Spanish, or Welsh.

Read: [https://www.onlinesurveys.ac.uk/help-support/supported-languages/](https://www.onlinesurveys.ac.uk/help-support/supported-languages/)

Watch: <under development>

### 1.17 Exporting and importing a survey structure

Learn how to:

- Download/Export your survey structure for sharing with other users (for example, as a survey template) and who can import it back into BOS.

Read: [https://www.onlinesurveys.ac.uk/help-support/exporting-importing-a-survey-structure/](https://www.onlinesurveys.ac.uk/help-support/exporting-importing-a-survey-structure/)

### 1.18 Sharing your survey with another user

Learn how to give other users within or outside your organisation full or limited access to your survey (and results):

- **Manage**: the other user can launch or unlaunch the survey.
- **Analyse (full)**: the other user can see and analyse all responses to the survey.
- **Analyse (limited)**: the other user can only see and analyse saved views of your survey responses that you have to specifically share with them.
- **Copy**: the other user can copy your survey and use it as a template for their own surveys.
- **Distribute**: the other user can access all pages in the Distribute tab and can set up or amend survey access control details.
- **Edit**: the other user can access the survey’s Design tab and make changes to the survey structure.
- **Permissions**: the other user can change existing access permissions or give permissions to other users (but only those permissions they have themselves been given).
- **Preview**: the other user can preview the survey.

Read: [https://www.onlinesurveys.ac.uk/help-support/sharing-a-survey-with-another-user/](https://www.onlinesurveys.ac.uk/help-support/sharing-a-survey-with-another-user/)
1.19 Editing a launched survey

Learn how to:

- Make minor or aesthetic changes to a launched survey.

Read:  [https://www.onlinesurveys.ac.uk/help-support/editing-a-launched-survey/](https://www.onlinesurveys.ac.uk/help-support/editing-a-launched-survey/)
2  DISTRIBUTE YOUR SURVEY: Overview and Links

You have designed your survey and are almost ready to distribute it. Points 2.1 – 2.10 provide an overview of the distribution elements of a BOS survey.

2.1  Piloting your survey

Learn how to:

- Check a survey before its official launch.

Read:  https://www.onlinesurveys.ac.uk/help-support/piloting-your-survey/

2.2  Survey access control

Learn how to control who can access and complete your survey.

- Choose not to enable survey access control.
  (Use own methods, eg UoD email tool, to distribute survey link)

- Choose to enable survey access control – set a single survey password (also see 2.3 below).
  (Use own methods, eg UoD email tool, to distribute survey link)

- Choose to enable survey access control – set username & password combinations or personalised URLs (also see 2.4 & 2.5/2.6 & 2.7 & 2.8 below)
  (Use own methods or BOS, eg UoD or BOS email tool, to distribute survey link)

Read:  https://www.onlinesurveys.ac.uk/help-support/survey-access-control/

2.3  Setting up a survey password

Learn how to:

- Restrict access to your survey with a single password which your respondents have to enter before beginning the survey.

Read:  https://www.onlinesurveys.ac.uk/help-support/setting-up-a-survey-password/
2.4 **Controlling who can complete your survey**

Learn how to:

- Restrict access to your survey with individual passwords and usernames OR personalised URLs (also see 2.5/2.6 below).

**Read:** [https://www.onlinesurveys.ac.uk/help-support/controlling-who-can-complete-your-survey/](https://www.onlinesurveys.ac.uk/help-support/controlling-who-can-complete-your-survey/)

2.5 **The components of a respondent list**

Learn about the components of a respondent list:

- Username
- Password
- Email
- Token
- 10 fields which can contain pre-populated data as required by the survey author

**Read:** [https://www.onlinesurveys.ac.uk/help-support/the-components-of-a-respondent-list/](https://www.onlinesurveys.ac.uk/help-support/the-components-of-a-respondent-list/)

2.6 **Importing your respondent list**

Learn how to import your respondent list (if you have a long list of participants it will be quicker to import it):

- Prepare your spreadsheet
- Save your spreadsheet in CSV format
- Import your list into BOS

**Read:** [https://www.onlinesurveys.ac.uk/help-support/importing-your-respondent-list/](https://www.onlinesurveys.ac.uk/help-support/importing-your-respondent-list/)

2.7 **Inviting respondents to participate in your survey**

Learn how to:

- Send your survey invitations using BOS (also see 2.8 below).
- Export respondent details and use your own methods to distribute survey invitations.

**Read:** [https://www.onlinesurveys.ac.uk/help-support/inviting-respondents-to-participate-in-your-survey/](https://www.onlinesurveys.ac.uk/help-support/inviting-respondents-to-participate-in-your-survey/)
2.8 Inviting and reminding respondents using BOS

Learn how to:

- Invite and remind respondents to complete your survey straight from BOS.

Read: [https://www.onlinesurveys.ac.uk/help-support/inviting-and-reminding-respondents/](https://www.onlinesurveys.ac.uk/help-support/inviting-and-reminding-respondents/)

2.9 Launching your survey

Learn how to:

- Launch your survey.

Read: [https://www.onlinesurveys.ac.uk/help-support/launching-your-survey/](https://www.onlinesurveys.ac.uk/help-support/launching-your-survey/)

2.10 Distributing your survey URL

Learn how to

- Distribute your survey to respondents, both within BOS or outside of BOS.

Read: [https://www.onlinesurveys.ac.uk/help-support/sharing-your-survey/](https://www.onlinesurveys.ac.uk/help-support/sharing-your-survey/)
You wish to view/analyse the responses to your survey. Points 3.1 – 3.10 provide an overview of the view/analysis elements of a BOS survey.

3.1 Accessing survey responses
Learn how to:
- Access your survey responses.
- Customise how the data is displayed.
- Save your responses as a PDF.
Read:  https://www.onlinesurveys.ac.uk/help-support/accessing-survey-responses/

3.2 Providing limited access to results data
Learn how to:
- Provide other BOS users with limited access to the result data.
Read:  https://www.onlinesurveys.ac.uk/help-support/providing-limited-access-to-results-data/

3.3 Browsing and excluding individual responses
Learn how to:
- Browse individual survey responses.
- Exclude (and reinstate) a response.
Read:  https://www.onlinesurveys.ac.uk/help-support/browsing-and-excluding-individual-responses/

3.4 Anonymising your response data
Learn how to:
- Anonymise pre-populated questions containing personal or identifying information by hiding or discarding data.
Read:  https://www.onlinesurveys.ac.uk/help-support/anonymising-your-response-data/
3.5 **Cross tabulating responses**

Learn how to:

- Look at the relationship of two or more variables given in your survey responses (e.g., compare answers by age and gender).

**Read:** [https://www.onlinesurveys.ac.uk/help-support/cross-tabulating-responses/](https://www.onlinesurveys.ac.uk/help-support/cross-tabulating-responses/)

3.6 **Filtering survey responses**

Learn how to:

- Filter survey responses by date or question number.
- Filter responses by answers given.
- Save a combination of filters and settings.

**Read:** [https://www.onlinesurveys.ac.uk/help-support/filtering-survey-responses/](https://www.onlinesurveys.ac.uk/help-support/filtering-survey-responses/)

3.7 **Exporting response data**

As well as using the analysis features available in BOS, learn how to:

- Export your response data and analyse it in your choice of statistical software package.

**Read:** [https://www.onlinesurveys.ac.uk/help-support/exporting-response-data/](https://www.onlinesurveys.ac.uk/help-support/exporting-response-data/)

3.8 **Comparing response from several surveys**

Learn how to:

- Compare the responses from two or more surveys that have the same structure or contain matching questions.
- Compare different language versions of the same survey, as long as the order, number and types of questions are the same.
- Measure your results against those of other researchers running the same survey, even if some of the questions are different.
- Track and analyse trends in regularly running surveys.

**Read:** [https://www.onlinesurveys.ac.uk/help-support/comparing-responses-from-several-surveys/](https://www.onlinesurveys.ac.uk/help-support/comparing-responses-from-several-surveys/)
3.9  Merging responses from several surveys
Learn how to:
- Merge the responses from two or more surveys that have the same structure.
Read:  https://www.onlinesurveys.ac.uk/help-support/merging-responses-from-several-surveys/

3.10  Copying Charts from the Analysis Summary
Learn how to:
- Download individual chart images
- Copy the analysis summary from your browser
Read:  https://www.onlinesurveys.ac.uk/help-support/advanced-analysis-image-exporting/