

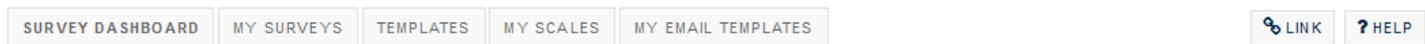


Use WebLearn to create and deliver online surveys to the general public, members of WebLearn sites, or ad-hoc groups of named participants. All surveys are anonymous.

Getting started

Get to know the Survey environment in WebLearn

1. Add the **Survey** tool to any existing WebLearn site
2. Your **Survey Dashboard** spans all your WebLearn sites and can be accessed from any site
3. The **Survey Dashboard** contains quick links to any surveys that are in progress and recently closed surveys
4. To get started, you must first create a **template** which is the set of questions you will use to create one or more **surveys**
5. On the **Survey Dashboard** there are links at the top to your existing surveys ([My Surveys](#)) and templates ([Templates](#))
6. Decide whether you need to [Create new template](#) or [Start new survey](#) (based on an existing template).



Survey dashboard

Quick links to survey items.

Your survey dashboard contains quick links to any surveys that are in progress now and recently closed surveys. To get started with your surveys, first create a template. You will use your templates as the basis for all the surveys you send out. When you have created your template, click 'start new survey'.

Create a new template (set of questions)

 **NOTE:** There are public templates that you can copy and modify to suit your purpose. If no suitable public template exists, then you can create your own customised template. *Note that currently templates you create are visible only to you.*

1. **Click Create new template**
2. Type in a title for this new template
3. You may add notes – these do not appear to participants on the survey
4. **Click Next**
5. Under **Add an item** click on the drop-down list of question types
6. Select a question type of your choice (Rating/Lickert Scale, Multiple Choice, Multiple Answer, Free Text/Essay, Heading/Instruction (providing information, no response required), or Suggested Question (pre-defined questions))

 **NOTE:** Since all surveys are **anonymous** by default, if you need to identify respondents, you will need to make the first question a **Free Text/Essay** type question, requesting the respondent to type in their name

7. **Click Add**
8. Enter the stem of the question. You may format your text, insert tables, insert images etc. using the HTML editor
9. Enter the answer options, if applicable. For a Rating Scale question, select the scale you wish to use.
10. Click on the **Scale Display Setting** to control how the item should be displayed (e.g. vertical list, full width, colours etc.)
11. You can choose to include a 'not applicable' option, a comment box for the user to type in text comments, and whether to make this question compulsory or not.
12. Item Category: The default is **General**. If this is a course or lecturer evaluation, you can select **Lecturer/supervisor** and then the question set will be repeated for each maintainer/contributor (assuming you allocate a survey based on this template to a WebLearn site)
13. **Click Save** and add more items as necessary

Create a Survey

Once you have created your template, you can use it to create one or more surveys; for example you may create versions of the same survey for Hilary Term, Trinity Term and Michaelmas Term. Think of this step as specifying settings for a particular survey to be delivered at a particular time.

1. **Click Start new survey**
2. **Step 1 of 4: Start a New Survey:**
 - Type in a title for this new survey, that will be meaningful to the participants
 - Type in any instructions to the participants, which will be displayed at the top of the survey
 - If you started your new survey directly after creating your template, then the system knows which template to use

- If you started your new survey from the **Survey Dashboard**, then you will need to select the required template (from your list of templates)

- **Click Next**

3. Step 2 of 4: Survey Settings:

- **Survey Dates:** Enter the **Start Date** and **Time**, and **Closing Date** and **Time**
- **Survey Results:** Usually you can leave these defaults as to who can see the results of the survey; viewing survey results is possible only after the survey closes. Results are private but can be downloaded and circulated.
- **Login/Don't have to login** – Select the appropriate option:
 - If you select **Login**, then the system 'knows' who the recipients are, records who has/has not responded, and can send reminders to those who have not completed the survey. [Note: all responses remain anonymous.]
 - If you select **Don't have to login**, the system cannot identify who has/has not responded, and reminders will go to all named recipients
 - For a public survey, select **Don't have to login**
- **Question-level settings:** Decide if questions may be left unanswered and if respondents may change their answers
 - NOTE: If you DON'T tick the box '**Allow questions to be left unanswered**', then ALL questions will be compulsory
- **Survey Administrative Settings:** Select whether your respondents should **Login for WebLearn** (only if you intend to assign the survey to a WebLearn site or users with a WebLearn account), or if they **Don't have to log in** (for ad-hoc groups, and the public)
- **Question-level Settings:** By default only users with the **access role** can respond – tick the box if you wish to **Allow all roles to take the survey**
- **Survey Notification and Reminders:** Click [View and edit the notification email](#) to modify the email that will be sent out to your respondents on the morning of the day the survey opens, OR
 - Remove the tick in the box if you do NOT wish a notification email to be sent to participants on the day the survey opens
- **Frequency of reminders:** The system can send reminders to respondents who have not yet completed the survey. Click on the drop down box to select the frequency of reminders (Never, daily, every week etc.)
 - Reminders will be sent regardless of whether respondents are required to login or not
- Click [Read and change the standard reminder email](#) in order to customise the reminder email for your particular survey
- At the bottom of the screen, **Click Next**

4. Step 3 of 4: Assign survey to respondents

- If you want your survey to be public, skip this step.
- If you wish to assign the survey to one or more WebLearn sites, tick the corresponding boxes
 - ☞ **NOTE:** a snapshot of the current site membership is used
- Alternatively you can **Create a new Adhoc Group** if one does not exist, by entering the email addresses of individuals to whom you wish to assign the survey
 - ☞ **NOTE:** If anyone in the ad-hoc group does not already have a WebLearn account, then they will not be able to take the survey
- Each survey has a unique a web link which you can provide in mailing lists or on websites to solicit responses
- **Click Next**

5. Step 4 of 4: Confirmation of Survey Assignment

- Check the summary of your survey:
 - If you wish to change anything, **Click Back**.
 - If you are happy with the survey settings, **Click Finished**.

Finding the Web Link of a survey

When you have completed creating a survey, you can find the **Web Link** of that survey to provide to public participants

1. Click on [My Surveys](#)
2. Under **Current Surveys** and alongside your survey title, click on the link ([Web link](#))
3. This provides a preview of your survey
4. For a public survey, copy the web address (URL) of this page and circulate it to people who should respond to it

Checking progress

For surveys that are *current* or *completed*, you can check who has completed the survey and who has not yet responded (you cannot see any individual responses). To preserve anonymity in a survey that requires log in, a minimum of two people must have responded; for a public survey, results can be viewed at any time.

1. Click on [My Surveys](#)
2. Alongside your survey title, click on the link in the column **Response Rate** ([x/y](#))

3. On the **Response Rate** page, you can choose to send a manual email reminder
4. You cannot view the results of an open survey. You may **close** the survey, view the results, and then re-open the survey
In this case, you must remember to reset the **Closing date**, which would have defaulted to the current date

Viewing and exporting results of a survey

WebLearn automatically collects and summarises the response data from surveys

1. When the closing date and time of your survey are reached, the survey will move to your list of **Completed surveys**
2. Click on [View Results](#) (results can also be viewed while the survey is open, but be aware that they may change, particularly if you have allowed respondents to change their answers)
3. The results are displayed on the screen, showing frequency and percentage summaries for closed questions
4. If your participants were required to log in, you can see a list of who completed the survey (but not what individuals said): To do this, click on [Who took this survey?](#)
5. Click [Export csv version](#) to export the data to csv (standard spreadsheet format), or click [Export Excel](#)
6. To export a PDF report of all the results, click [Export PDF](#). The report displays bar charts and frequencies, and textual responses
7. If you want to share results of a survey with your colleagues, place a copy of the results in a Resource folder in your WebLearn site, and specify for that folder who can view the files it contains

Changing ownership of templates

By default, the templates you create are private – no one else may see or edit them. However, it is possible to ‘share’ your template with your colleagues (e.g. fellow lecturers in your department or faculty). Templates are ‘shared’ by passing the ownership from one individual to another.

To change ownership of a template, simply click on the [Change Owner](#) link on the [Templates](#) page.

Templates

Your templates are the basis for your surveys. Each template consists of any necessary instructions and the questions that you want your respondents to fill in.

Templates	Owner	Last changed	
Course evaluation template Apr 2011 (Web link)	Jill Fresen	14-Apr-2011	Edit Remove Preview <input type="button" value="Copy"/> <input type="button" value="Change Owner"/>

Useful links

1. Various survey tools and their features – comparison document:
https://weblearn.ox.ac.uk/access/content/group/info/other/Comparison_of_survey_tools.pdf
2. WebLearn Surveys tool – step-by-step guide: <https://weblearn.ox.ac.uk/access/content/group/info/step/surveys73.pdf>
3. WebLearn Surveys tool – lunch time course at IT Services:
<https://oxford.imparando.com/accessplan/details/courses/course.aspx?coursedataonly=0&courseid=TE011&comp anyid=OXFORDXU4U>