

Surveys: Introduction to Jisc Online Surveys and Microsoft Forms



The small print

Prerequisites

Time in the workshop is precious – it is an opportunity for you to interact with the workshop leader and other participants through questions and discussions and to share your experiences and concerns. To make the most of this time we sometimes ask you to carry out learning activities ahead of the workshop so that everyone comes into the class with the same basic knowledge. We keep this prior learning to a minimum and often make use of online videos. Online videos provided through ‘Molly’ can be accessed by University members anytime, anywhere, through a browser or app.

Your course booking will tell you if any prior learning activity is required. If you don’t have an environment where you can do this learning, you can come along to one of our ‘quiet’ sessions. These are scheduled every week in normal term-time, and are a quiet space where you can work through ‘Molly’ videos or other workshop resources.

If you turn up for a workshop without having done the prior learning, the workshop leader may suggest that you come back on another session.

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About the workshop designer

Meriel is a member of the IT Services Research Support team. She has been involved in research data management support (including developing and delivering training) in Oxford for over a decade, and has been responsible for the Research Support team’s Survey Advice Service since 2017. She is also part of Research Data Oxford, a cross-departmental initiative offering advice and support.

Revision history

Version	Date	Author	Comments
1.0	October 2020	Meriel Patrick	Created

About this workshop

This course provides an introduction to two survey tools that are available to members of the University of Oxford: Jisc Online Surveys, and Microsoft Forms.

What you will learn

We'll look at the capabilities of each tool, and explore some of their strengths and weaknesses.

We'll work through the process of creating a survey, distributing it, and analysing the results. You'll have the chance to try out both tools for yourself.

We'll also look briefly at the data protection issues that need to be considered when running a survey.

We will include pointers to some further resources that you may wish to explore after the workshop.

What you need to know

This course does not require any pre-existing IT skills or knowledge beyond the ability to use a web browser and work with files.

Both survey tools are browser-based. I will assume that you are reasonably confident in using a browser (e.g. Chrome, Firefox, Edge, etc.) to visit websites and sign in to them, select options using a mouse or other device of your choice, enter text into on-screen fields, and so forth.

Both tools allow survey results to be exported as an Excel spreadsheet, and Jisc Online Surveys also allows exports in other formats. I will assume you are familiar with the process of opening and viewing files and choosing a location in which to save them.

The resources you need

The exercises below include some suggested questions which you can use when creating surveys to try out the tools. However, if you are already planning a survey and have already started drafting your questions, you may wish to use these instead.

Before the course, you need to visit <https://help.it.ox.ac.uk/jisc-online-surveys> and request a Jisc Online Surveys account. You should ideally do this several days before the course, to allow time for the request to be processed (accounts are normally created fairly quickly, but it can take longer at busy times). You will need to have your Jisc Online Surveys username (normally your University email address) and password to hand during the course. You will also need to know your SSO username and password to log in to Microsoft Forms.

Unless you have been told otherwise, in classroom workshops there will be a computer available for you to use with a web browser installed. You can use your own computer with your preferred browser installed if you prefer.

Learning Objectives

This workshop has the following learning objectives:

Learning Objective One - Gaining an overview of what should be considered when selecting a survey tool

Learning Objective Two - Learning about the capabilities of Jisc Online Surveys and Microsoft Forms

Learning Objective Three - Creating surveys using Jisc Online Surveys and Microsoft Forms

Learning Objective Four - Exploring options for distributing surveys and for analysing the results

Learning Objective Five - Understanding the data protection issues that need to be considered when running a survey

Learning Objective Six - Further assistance and other survey tools

Learning Objective One - What should be considered when selecting a survey tool

When selecting a survey tool, there are a number of questions to consider:

What survey tools are available to me?

It's always worth considering the range of options available: even if you're already familiar with one survey tool, there may be others that are a better fit for your needs.

This course covers two survey tools which are available to all University members, and which are free at the point of use. Some other tools are briefly discussed under Learning Objective Six.

What functionality do I need?

Survey tools vary a good deal, both in terms of what it's possible to do within the survey itself (for example, the range of available question types, and the options for structuring a survey) and the tools that are offered for managing a survey (for example, distribution tools, analysis functionality, or the ability to collaborate on building a survey). Having a clear idea of your requirements will help you make the right choice.

An overview of the capabilities of Jisc Online Surveys and Microsoft Forms is given under Learning Objective Two. You'll have an opportunity to explore their potential for creating, distributing, and analysing surveys under Learning Objectives Three and Four.

Will I be collecting personal data?

If your survey responses will include personal data – that is, any information about a living, identifiable individual – you need to ensure it's handled properly. This includes both selecting the right survey tool, and ensuring that your processes for dealing with the data are appropriate. Data protection considerations for surveys are covered under Learning Objective Five.

In some cases, non-personal data may still be sensitive for other reasons – for example, you might be asking respondents to provide information about the whereabouts of endangered species. This will also require some careful thought about appropriate data handling.

What will happen to the data once the survey is complete?

It's worth thinking about what you will need to do with the data once you have gathered it. Will you be able to draw the conclusions you need from the data as presented within the survey tool, or will you want to export it for further analysis? If the latter, how and where will you store it? If the data is personal or otherwise sensitive, is your chosen storage solution adequately secure?

Once you have concluded your analysis, will the data be retained or deleted? If the former, where will it be kept, and for how long? If it's research data, is it possible to make some or all of it available for use by other researchers? If the data is personal or otherwise sensitive and needs to be deleted, you may need to think about secure methods of erasure, to ensure data cannot be retrieved.

Do I need to share the survey and/or its results with colleagues?

If you are working as part of a team, you may wish to collaborate on the creation of the survey. Jisc Online Surveys and Microsoft Forms both allow you to give editing access to other members of the University, and to people outside the University with accounts on the relevant system.

You may also wish to share the survey results. Both tools allow this to be done in several ways. Within the survey platforms, you can share a full survey with someone else, or you can give them limited access to the results. Alternatively, you can export the results and share either the full results file or an edited version of it. (If the data is personal or sensitive, you will of course need to ensure that any sharing is done in a way that is compatible with proper handling of the data.)

Do I have a budget available?

Survey tools range from free to extremely expensive. If you need more sophisticated functionality, you may have to pay for this – or work out an alternative way of achieving your goals.

The tools covered in this course are both free at the point of use.

Learning Objective Two - Capabilities of Jisc Online Surveys and Microsoft Forms

About Jisc Online Surveys

Jisc Online Surveys was originally created by Bristol University. For many years, the services was known as Bristol Online Surveys (or BOS), and you may occasionally still see it referred to that way. The name changed after Jisc took over the service in 2017.

The University of Oxford has an organisation-wide licence for Jisc Online Surveys, meaning that the service is available free of charge to all staff, students, and academic visitors.

Jisc Online Surveys was created for use in academic contexts. This means that the feature set was designed with the sort of surveys commonly run in higher education in mind (although perhaps surprisingly, it lacks some features that are required for certain types of research survey – e.g. question randomisation).

The University's Information Security team has assessed the service, and considers it suitable for use with all University data, including confidential data. However, as with any service, survey creators will still need to ensure their data handling practices comply with GDPR and any other relevant legal or ethical requirements. This is covered in more detail under Learning Objective Five.

Jisc Online Surveys offers an extensive collection of help and support articles:

<https://www.onlinesurveys.ac.uk/help-support/>

About Microsoft Forms

Microsoft Forms is part of the Office 365 suite of apps. It is available free of charge to all members of the University of Oxford through the Nexus365 service.

Microsoft Forms is a general tool created for use in a range of contexts. This means that some features are designed for commercial rather than academic projects (e.g. gathering customer feedback). Nevertheless, it is still perfectly possible to use Microsoft Forms for academic surveys.

The University's Information Security team has assessed the service, and considers it suitable for use with all University data, including confidential data. However, as with any service, survey creators will still need to ensure their data handling practices comply with GDPR and any other relevant legal or ethical requirements. This is covered in more detail under Learning Objective Five.

Microsoft's support materials for Forms are available here: <https://support.microsoft.com/en-gb/forms>. This provides a general overview of the tool, but bear in mind that it covers all available versions. For Oxford users, some aspects of the tool (e.g. the method of logging in) will be specific to Nexus365.

Comparison of features

Both tools offer a secure platform suitable for creating reasonably straightforward surveys for research or administrative purposes.

While both tools offer the basic functionality common to nearly all survey platforms, there are significant differences between their more advanced features. Which tool is right for your project will therefore depend on your precise requirements. (If it is essential to have a combination of features not offered by either of these tools, you may need to look elsewhere: some other survey tools are briefly described under Learning Objective Six.)

The table below provides a comparison of the two tools. Please note that this is not intended to be exhaustive, but rather to give an overview of some commonly required features.

	Jisc Online Surveys	Microsoft Forms
Question types		
Multiple choice – single answer	✓	✓
Multiple choice – multiple answers	✓	✓

Dropdown list	✓	✓ (As display option for multiple choice questions)
Free text	✓	✓
Date	✓	✓
Time	✓	✗
Date and time	✓	✗
Ranking (move items into preferred order)	✗	✓
Likert scale (e.g. 5-point scale ranging from 'Strongly agree' to 'Strongly disagree')	✓ (Called scale/rank question)	✓
Grid questions (combine multiple questions in one grid)	✓	✗
File upload	✗	For surveys restricted to University members
Rating (give item between one and five stars)	✗	✓
Net promoter score (how likely are you to recommend this?)	✗	✓
Survey features		
Divide surveys into multiple pages	✓	✓
Custom routing/branching	✓	✓
Survey map (diagram of survey structure)	✓	✗
Add sub-questions	✓	✗
Make sub-questions conditional on answer to main question	✓	✗
Randomise order of answer options	✗	✓
Randomise order of questions	✗	✓
Add images to questions	✓	✓
Custom themes and background images	✓	✓
Creating and editing surveys		
Collaborate on surveys with other members of the University	✓ (Finer grained permissions)	✓ (Less fine grained permissions)
Collaborate on surveys with people outside the University	If they have a Jisc Online Surveys account	If they have an Office 365 work or school account

Export copy of survey questions (without responses)	✓	✓
Create copies of existing surveys	✓	✓
Edit surveys after launching	Limited (to prevent corruption of data already collected)	✓
Results		
View summary of responses	✓	✓
View individual responses	✓	✓
Visualisation of results (e.g. bar or pie charts of responses to multiple choice questions)	✓	✓ (Though more basic)
Filter results	✓	✗
Create customised views of results	✓	✗
Share full results with collaborators	✓	✓ (Only by sharing full access to survey)
Share customised views of results with collaborators	✓	✗
Create shareable summary of results (available to anyone with the link)	✗	✓
Export results as Excel spreadsheet	✓	✓
Export results as .csv file	✓	✗
Export coded results (for import into statistical software)	✓	✗
Filter or customise results set before exporting	✓	✗
Alternative question text for exports (allows spreadsheet columns to be given a concise heading)	✓	✗
Distribution		
Publicly available surveys (i.e. can be completed by anyone with the link)	✓	✓
Surveys can be restricted to members of the University (i.e. SSO login required to complete)	✗	✓
Surveys can be restricted to other groups in or outside University (e.g. via password or distribution list)	✓	✗

Set start and end date for surveys	✓	✓
Upload distribution list and send personalised invitations to potential respondents	✓	✗
Send reminders to people on distribution list who haven't completed the survey	✓	✗
Restrict responses to one per person	For surveys using a distribution list	For surveys restricted to University members
Automatically record identity of respondents	For surveys using a distribution list (via hidden question)	For surveys restricted to University members
Allow respondents to remain anonymous	✓	✓
HTML code for embedding survey on website	✓	✓
QR code for accessing survey	✗	✓

Learning Objective Three - Creating surveys using Jisc Online Surveys and Microsoft Forms

This section includes fairly detailed instructions for creating a simple survey in both Jisc Online Surveys and Microsoft Forms.

You don't have to follow these instructions if you'd prefer not to: you are welcome to explore the tools in your own way. However, the example surveys below are intended to provide a demonstration of some key features of the two tools.

Both tools can do far more than is covered here, so it's well worth taking some time to experiment with them. Some suggestions for additional activities are given at the end of this section.

Practical exercise: Creating a survey using Jisc Online Surveys

Before you can create a survey in Jisc Online Surveys, you will need an account. Members of the University of Oxford can request one by visiting <https://help.it.ox.ac.uk/jisc-online-surveys> (hopefully you'll already have done this, ahead of the workshop).

To use Jisc Online Surveys, go to <https://admin.onlinesurveys.ac.uk/>. Sign in using your email address (which functions as your username) and password.

You will be taken to your dashboard, which will show a list of all your surveys (if you have not yet created a survey or had one shared with you, this will be empty).

Click the blue **+** **Create new** button, located towards the top left-hand corner of the window. In the pop-up window that appears, type 'Example Jisc Online Surveys survey', or another name of your choice, then click **Create survey**.

You will be taken to the **Design** view: the **Design** tab towards the top of the window should already be selected.

Adding a consent screening question

Find the **Page 1** section in the main editing area. Click **Add item**, and then click **Note** in the pop-up list that appears. Type 'This is a survey to demonstrate Jisc Online Surveys. No personal data will be collected.' in the text field that appears, and then click **Add note**. In a real survey, this section could include more details about the survey and what the data collected will be used for, and perhaps a link to a privacy notice or participant information sheet.

The note will appear in the **Page 1** section. You should now have two **Add item** buttons: one above the note and one below. Click the one below it, and then click **Multiple choice (single answer) question**.

In the **Question text** box, type 'I have read the above information, and consent to participating in this survey.' In the **Add answer option** box, type 'Yes'. Now click **Add another answer option**, and type 'No' in the box that appears.

Click the small arrow next to the 'No' answer box to view the additional options. Check the **Screen to message** box. This rather cryptic instruction means that if participants select this option, they will be directed out of the survey, to a message saying that they have been screened out. (Another option would be to put a URL in the **Screening URL** box: participants who select this option would then be directed to that URL, which could be a page with a custom message on it, instead of continuing in the survey.)

It's important that participants complete this question, so we'll make it required. Click **Advanced options**, so the question editing window expands. Click the **Required** radio button to select it.

Before we add the question to the survey, we can do something else to make life easier later. In the **Alternative question text for use in exports** field, type 'Consent'. This means that if the response data is now exported from this survey as a spreadsheet, the column heading for this

question will be 'Consent', rather than the longer and clunkier 'I have read the above information, and consent to participating in this survey.' Now click **Add question**.

The question will be shown in the **Page 1** section.

Adding further questions to your survey

Before we add additional questions, we'll first add some more pages to the survey. This will enable us to add branching later. The survey already has two pages, but the final page can't have any questions on it (this is where the final thank you message will appear). Between the two pages is an **Add page** button: click this. You can give the page a title if you like, then click the second **Add page** button to complete the process. Repeat this until the survey has a total of six pages, including the final one.

Let's add some questions to the new pages. Click the **Add item** button in the **p. 2** section, and then click **Multiple choice (single answer) question**. In the **Question text** box, type 'Do you prefer coffee or tea?' This time, we'll add the answers using the **Add many answer options box**: type 'Coffee', 'Tea', and 'Neither', adding a carriage return between each option. Click **Add question**.

Click the **Add item** button in the **p. 3** section, and then click **Single-line free text question**. Type 'What's your favourite variety of coffee?' in the text box, and click **Add question**.

Now click the **Add item** button in the **p. 4** section, and then click **Single-line free text question**. Type 'What's your favourite variety of tea?' in the text box, and click **Add question**.

Click the **Add item** button in the **p. 5** section, and then click **Multiple choice (multiple answers) question**. In the **Question text** box, type 'Which sorts of biscuit do you like?', and in the **Add many answer options** box, type 'Bourbons', 'Custard creams', 'Ginger nuts', and 'Shortbread', adding a carriage return between each option. Click **Add question**.

(Each page of a survey would normally have multiple questions on it. We're keeping the number of questions to a minimum for speed.)

Lastly, we'll add a thank you message to the final page. In the **Final page** section, click **Add item**, and then click **Note**. Type 'Thank you for completing this survey.' in the text box, and then click **Add note**.

Adding branching to your survey

We'll now add branching (also known as routing or skip logic) to the survey, so that respondents are directed to the questions that make sense given their previous answers.

(Jisc Online Surveys actually has two separate ways of customising the questions that a specific survey respondent sees. We'll see an example of the other (conditional sub-questions) later in the course.)

Return to the **p. 2** section. Click the pencil symbol on the multiple choice question to edit it.

Each answer option now appears in its own box. Click the small arrow to the right of the 'Coffee' box. From the **If selected, jump to** drop-down list, select **Page 3**. Click the arrow to the right of the 'Tea' box, and select **Page 4** from the drop-down list. Click the arrow to the right of the 'Neither' box, and select **Page 5** from the drop-down list. Scroll to the bottom of the pop-up window, and click **Save**.

Note that Jisc Online Surveys will only implement the routing when the respondent submits their answers for that page – so a question at which the survey branches should always be the final question on a page.

We need to add one final bit of routing, so that respondents who answer the question about their favourite variety of coffee aren't also taken on to the question about tea. Locate the **p. 3** section, and this time click the pencil symbol on the bar at the top of this section, rather than on the question

within it. Click **Advanced options**, and then select **Page 5** from the **Unrouted respondents go to** drop-down list. Click **Save**.

Previewing your survey

If necessary, scroll back to the top of main **Design** view window. Click the **Preview survey** button. (This can be found on the left-hand side of the window, underneath a list of options.)

This shows the survey as it will appear to participants. You can work through the questions as many times as you choose, trying out different combinations of answers to see what happens. Use the **Return** button in the top left-hand corner of the window to go back to the Design view.

Survey responses that you enter in preview mode will not be recorded.

Practical exercise: Creating a survey using Microsoft Forms

To use Microsoft Forms, go to <https://forms.office.com/>. If you are already logged in to Nexus365 (for example, because you are already using Microsoft Teams), you'll be taken straight to the **My Forms** screen.

If you aren't already logged in, click **Get started**. In the **Sign in** window, enter your SSO username followed by @OX.AC.UK (for example, abcd1234@OX.AC.UK). Click **Next**. You'll be taken to the Webauth page: log in using your SSO username and password.

You may see a pop-up window with a **Create a new form button**; if so, click this. Otherwise, click the **New Form** button which is towards the top left-hand corner of the **My Forms** screen.

Click the Form name (this will probably be something like 'Untitled form') to rename it. Call it 'Example Microsoft Forms survey', or another name of your choice.

In the box labelled **Enter a description**, type 'This is a survey to demonstrate Microsoft Forms. No personal data will be collected.' In a real survey, this section could include more details about the survey and what the data collected will be used for, and perhaps a link to a privacy notice or participant information sheet. Click anywhere else on the screen to save your changes to the survey name and description.

Adding a consent screening question

Click **+ Add new**, and then click **Choice** to select a multiple choice question. In the **Question** box, type 'I have read the above information, and consent to participating in this survey.' In the box labelled **Option 1**, type 'Yes'; in the box labelled **Option 2**, type 'No'.

It's important that participants complete this question, so we'll make it required. Click the **Required** toggle switch to turn this feature on.

Microsoft Forms doesn't provide a specific feature to screen out participants who answer 'No' to this kind of question, so we'll handle this when we add branching to the survey, a little later on.

Adding further questions to your survey

Before we add additional questions, we'll break the survey into sections. This makes it easier to add branching. Each section will appear as a page in the finished survey.

Click **+ Add new**, then click the down arrow to see the full range of options, then click **Section**. The section name box will be highlighted: type 'Preferences' in it.

Click **+ Add new** again, and then click **Text** to add a free text question. In the Question box, type 'What's your favourite drink?'.

Click **+ Add new** once more, and then click **Choice** to add another multiple choice question. This time, however, click the **Multiple answers** toggle switch, to allow participants to select more than one answer. In the **Question** box, type 'Which sorts of biscuit do you like?' Click **+ Add option**

twice so that the question has spaces for four answer options, and then fill these in with 'Bourbons', 'Custard creams', 'Ginger nuts', and 'Shortbread'.

(Alternatively, if you wish to and have time, you can add extra sections and questions to replicate the survey structure created above using Jisc Online Surveys, and then adjust the survey branching accordingly.)

Adding thank you messages for survey respondents

We need to add two separate messages: one specifically for those who do not consent to participating in the survey (and hence who will not be taken through the rest of the survey questions), and one that all respondents will see at the end of the survey.

To add the message for those who do not consent, we need to add another section. Click **+** **Add new**, then click the down arrow to see the full range of options, then click **Section**. Call this section 'Thank you'.

In the **Enter a description box**, type 'Thank you for your interest, but this survey can only be completed by those who have consented to participating.'

To add the message for all respondents, click the row of three dots in the top right-hand corner of the window (just to the right of the **Share** button), and then click **Settings**. Under **Options for responses**, click the **Customise thank you message** box to check it. In the text box that then appears, type 'Thank you for completing this survey.' Click anywhere outside the **Settings** pane to close it.

Adding branching to your survey

Click any question in the survey to select it. Then click the row of three dots that appears just to the right of the **Required** toggle switch to see additional options. Click **Add branching**. This switches you to the branching options view.

In the drop-down list next to the 'No' answer option in the first question, select **Section 3. Thank you**. This means that anyone who answers 'No' to this question will be taken straight to this thank you message.

In the drop-down list at the end of Section 2, select **End of the form**. This prevents people who have completed this section from seeing the thank you message intended for those who did not consent to participating.

Click **Back** at the top of the window (*not* the back button in your browser) to return to the main survey editing view.

Previewing your survey

Once back in the main survey editing view, click the **Preview** button. (This can be found at the top of the window, towards the right-hand side.)

This shows the survey as it will appear to participants. You can work through the questions as many times as you choose, trying out different combinations of answers to see what happens. Click **Back** at the top of the window (*not* the back button in your browser) to return to the editing view.

When you preview the survey, you may see a message telling you that when you submit the form, the owner (i.e. you) will be able to see your name and email address. This conflicts with the message we added earlier saying that no personal data will be collected: we'll sort this out in the next section.

Any answers you enter while previewing a survey in Microsoft Forms will be recorded, and will appear in the **Responses** tab (viewing responses is covered in more detail in a later section). You can delete these before launching the survey.

Practical exercise: Additional activities

If time permits, you may like to try some of the other tasks listed below.

If you need assistance with any of these, you can ask during the workshop, or send a follow-up query to researchsupport@it.ox.ac.uk. For online workshops, you can also send a follow-up query to the course tutor using the Microsoft Teams chat function.

Alternatively, you can explore the survey tools' online support materials:

- Jisc Online Surveys: <https://www.onlinesurveys.ac.uk/help-support/>
- Microsoft Forms: <https://support.microsoft.com/en-gb/forms>

Additional activities – both survey tools:

- Try out some of the other question types
- Experiment with more complex branching
- Change the order of questions or sections
- Add an image to a question
- Experiment with different themes and/or add a background image

Additional activities – Jisc Online Surveys only

- View the survey map to see the structure of your survey
- Explore some of the other **Advanced options** when adding questions
- Try adding sub-questions, and make some of these dependent on the answer to the main question

Another way to create a Microsoft Form

Because Microsoft Forms is part of the Nexus365 suite of tools, it's possible to create Forms from inside other apps. For example, you can create an Excel spreadsheet, and then create a Form connected to it from inside Excel.

To do this, start by opening the Nexus365 web version of Excel. (One way to do this is to click the waffle button in any Nexus365 web app, and then select Excel from the list of apps which appears.)

Create a new blank workbook, and then click **File > Save As > Save As**. Give the file a name of your choice (e.g. 'Spreadsheet with attached Form'), and select an appropriate location in your Nexus365 OneDrive storage to save it.

Now click **Insert** on the ribbon, and then click **Forms > New Form**. This will create a Form which is linked to the Excel spreadsheet.

Add some questions to the Form, as described in the exercise above.

Now return to the spreadsheet. You should see that it has been automatically populated with column headings that match the questions, plus some metadata fields (ID, start time, etc.). Sometimes it may take a few moments for the spreadsheet to update, so if you don't see this immediately, be patient.

Return to the Form, click **Preview**, and complete the survey questions. When you go back to the spreadsheet, you should now see your responses.

This method allows you to create a spreadsheet and a Form which are dynamically linked. The data collected via the Form is automatically deposited in OneDrive, removing the need to export a copy of the data.

However, some caution is needed! It is possible to edit the data in the Excel spreadsheet, creating a misleading impression of what was submitted via the survey. The version of the data that is stored in Forms will remain unchanged, so the two will now be out of step with each other. If this method is used, extreme care must be taken not to accidentally falsify survey results.

Learning Objective Four - Exploring options for distributing surveys and for analysing the results

Practical exercise: Distributing your Jisc Online Surveys survey

Before you can distribute your Jisc Online Surveys survey, you first need to launch it. This is done via the Survey Launchpad.

Click the **Distribute** tab, towards the top left-hand corner of the screen. The Survey Launchpad should now be visible (if not, select the top option in the list on the left-hand side).

If there are any problems which would prevent the survey from being launched, a warning message will be displayed. If not, you're good to go!

However, it's important to be aware that Jisc Online Surveys strictly limits the changes that can be made to a survey after launching it, to prevent the potential corruption of data that has already been submitted. Thus it's best not to launch a survey if you might want to edit it further.

If you want to try launching a survey, but also want to keep working on it, the best option is to make a copy of it: you can then launch one and continue editing the other. To copy a survey, go back to the Jisc Online Surveys dashboard (there's a button in the top left-hand corner of the window), and click the purple copy icon in the same row as the survey's name.

Once you're ready to launch your survey, check the opening and closing dates on the Survey Launchpad, and adjust these if needed. If the opening date is still in the future, it will not be possible for potential respondents to complete the survey until the opening date, even if the survey has been launched.

When you're happy with the dates, click the green **Launch survey** button.

The public URL for the survey (that is, the URL via which the survey can be completed) is given on the Survey Launchpad. You can now share this URL with potential respondents via your chosen means.

Once the survey has been launched, other sharing options are also displayed, including a short piece of HTML that can be pasted into a website to embed the survey there.

It's also possible to upload a distribution list, and to send out personalised invitation emails via Jisc Online Surveys. You can also restrict access to a survey, by adding a password. You may wish to explore these features if you have time.

Practical exercise: Distributing your Microsoft Forms survey

The default setting is for Microsoft Forms surveys to accept responses as soon as they are created, so they do not need to be launched *per se*. However, there are some settings that should be checked before distributing the survey.

Open the settings pane by clicking the row of three dots in the top right-hand corner of the window (just to the right of the **Share** button), and then click **Settings**. As the survey information we added earlier says that no personal data will be collected, we need to uncheck the **Record name** box.

Only people in my organisation can respond is selected by default: if desired, this can be changed to **Anyone with the link can respond**.

The **Accept responses** box will probably already be checked: if not, click it to check it. A start date and an end date can be set if desired. Click outside the **Settings** pane to close it.

Before making the survey details public, it's a good idea to delete any responses that were added during the process of previewing the survey, as these are unlikely to be good data. To do this, click on the **Responses** tab at the top of the window, then click the row of three dots that appears towards the right of the window (just above the **Open in Excel** button). Click **Delete all responses**, and then click **Delete** to confirm.

To see options for sharing the survey, click the green **Share** button, towards the top right-hand corner of the window. You can copy the URL for the survey, generate a QR code, or copy some HTML that can be pasted into a web page to embed the survey.

Practical exercise: Viewing survey results

This section uses two pre-created surveys which contain dummy data. Before viewing the survey results, you may like to complete a duplicate copy of each survey, so you can experience the surveys from the respondents' perspective. The links for these surveys will be circulated in the workshop.

Practical exercise: Viewing survey results in Jisc Online Surveys

A Jisc Online Surveys survey will be shared with you. To view this, go to the dashboard, and ensure that the **Just my surveys** box (towards the top of the window on the right-hand side, just above the blue bar) is unchecked.

Find the survey in the list, and click the **Analyse** link to see the survey responses.

You can now try several different things:

- View the summary of the survey responses – this is the default view
- View individual survey responses, by clicking the **Browse responses** tab
- Filter the survey responses, using the tools in the left-hand sidebar
- Create and save a custom view of the responses – do this by filtering the results and then clicking the **Save these settings** button
- Export a copy of the response data as a spreadsheet – start by clicking the **Export** button on the right-hand side of the window, towards the top.

Feel free to experiment with these and other features as time permits.

Practical exercise: Viewing survey results in Microsoft Forms

A link will be provided to a Microsoft Forms survey. To view the responses, click the **Responses** tab at the top of the window.

You can now try several different things:

- View the summary of the survey responses – this is the default view
- Explore the **More details** option for each question in the summary
- View individual survey responses, by clicking the **View results** button
- Export a copy of the response data as an Excel spreadsheet – click the **Open in Excel** button
- Create a summary link (this allows anyone with the link to see a summary of responses) and view the summary produced – start by clicking the row of three dots just above the **Open in Excel** button

Feel free to experiment with these and other features as time permits.

However, please bear in mind that other course participants will also be viewing the same survey, so try not to make any drastic changes!

Learning Objective Five - Understanding the data protection issues that need to be considered when running a survey

Personal data is any information about an identifiable living individual.

The main piece of UK legislation which governs the treatment of personal data is the Data Protection Act 2018, which implemented the General Data Protection Regulation – commonly referred to as GDPR.

Do you need to collect personal data? Might you end up with it even if you don't ask for it?

It's worth thinking about whether you actually need to collect personal data as part of your survey. For some projects, this will be essential, but in other cases, anonymous responses may serve the purpose just as well. If you can avoid having to deal with personal data, this makes things much more straightforward.

However, there are circumstances under which it's possible to end up with personal data even without asking for it. If an individual can be identified by combining information in the dataset with other available information, that is still deemed to be personal data.

For example, a University of Oxford SSO username may appear to be a fairly meaningless string of letters and numbers, but this could be combined with other information that is readily available within the University to identify the person the username belongs to. Surveys which ask for information about things like rare medical conditions can also inadvertently identify respondents: a specialist viewing the data may know that only one patient with that particular disorder is currently being treated within a given area. And if a survey contains free text fields, there is always a risk that participants will provide information which identifies them.

It is possible to reduce the risk of unwanted personal data being supplied by careful question design, and by adding a note to the survey asking participants not to include personal data in their answers. But if in doubt, it's usually safest to assume your dataset may include personal data, and proceed accordingly.

To ensure you are complying with GDPR requirements when running a survey which will (or may) involve personal data, there are two main things to consider: the survey tool you are using, and your processes for collecting and handling the data.

Survey tools and GDPR

There are two key GDPR requirements that have implications for survey tool selection.

First, personal data needs to be securely stored. Jisc Online Surveys and Microsoft Forms have both been assessed by the University's Information Security team and judged to be sufficiently secure for all categories of University data.

Secondly, data must not be transferred outside the European Economic Area unless certain additional safeguards are in place (these are quite narrowly prescribed, and it is not always straightforward to tell whether they have been met). This means that the physical location of the data storage used by the survey service is relevant. Jisc Online Surveys and the instance of Microsoft Forms provided via Nexus365 both store their data within the EEA.

Some further survey tools which meet these requirements are mentioned under Learning Objective Six.

There is need for caution when considering other third party tools. Some cloud-based services store data on servers around the world, so you may not even know where your data is located. (In particular, you should note that while the Nexus365 instance of Microsoft Forms stores data within the EEA, this is not guaranteed to be the case for all instances of Microsoft Forms – e.g. those to which you might have access through a personal account.)

Data collection and handling

GDPR imposes a number of obligations on anyone collecting or processing personal data. These include:

- Not collecting more personal data than is actually needed
- Only collecting data for specified, explicit, and legitimate purposes
- Processing data fairly, legally, and transparently
- Storing and processing data securely
 - In addition to affecting the choice of survey tool, this also applies to how and where exported data is dealt with
- Not retaining data for longer than necessary
 - It is recognised that it is sometimes legitimate to retain research data after the end of a study, but this needs to be justified

To ensure these requirements are met, it's important to think carefully about survey design, to provide respondents with appropriate information about what the data they supply will be used for and how it will be handled (see the next sub-section for more on this), and to have good processes in place for dealing with the data after it's been collected.

Prescribed information

GDPR requires that when personal data is collected directly from the individuals concerned (as will frequently be the case in a survey), they are told a number of things, known collectively as the prescribed information:

- The name of the data controller(s) – i.e. the legal entity which has ultimate responsibility for the data (for most University activity, the data controller is the University of Oxford)
- The contact details of the data protection officer
- The intended purposes for processing the data
- The legal basis for processing the data
- Who the data will (or may) be shared with
- Whether the data will be transferred outside the European Economic Area, and the safeguards that will apply to any transfer
- How long the data will be stored for
- The data subjects' rights under the GDPR

As this is a lot to deliver in the introductory section of a survey, it's common to put this information in a document which may be known variously as a privacy notice, a privacy policy, a data protection policy, or (for research projects) a participant information sheet. A link to this document can then be supplied at the start of the survey.

The University's Compliance website includes a Creating Privacy Notices section:

<https://compliance.admin.ox.ac.uk/creating-privacy-notice>. This includes links to a number of pre-existing privacy notices for different groups (e.g. for University staff, students, job applicants, etc.): if one of these is appropriate for your survey, you can simply link to it. If you need to create your own privacy notice, there is guidance on how to do this, including some templates.

Further guidance on data protection

The above is only a brief summary of some of the key points relating to data protection. For more comprehensive guidance, see:

- Staff Guidance on Data Protection, on the Compliance website: <https://compliance.admin.ox.ac.uk/staff-guidance>
- Data Protection and Research, on the Research Support website: <https://researchsupport.admin.ox.ac.uk/policy/data>

Special category personal data

Certain types of personal data are deemed to need stronger protection. These are known collectively as special category personal data, and include information about:

- race or ethnicity
- political opinions or religious beliefs
- trade union membership
- health, genetics, or biometrics (where used for identification)
- sex life or orientation

There are also additional safeguards for personal data relating to criminal convictions and offences.

If your survey will be collecting any of these, you will need to make doubly sure that your data handling and collection processes are GDPR-compliant. There are also some additional requirements – for example, in addition to giving the lawful basis for processing personal data, you are also required to state an additional condition for processing special category data. See the guidance materials linked to above for further information.

Other requirements

All University of Oxford research activities involving human participants need to go through the ethical review process. This includes surveys, even if no personal data is collected as a result. More information is available from the Research Ethics section of the Research Support website: <https://researchsupport.admin.ox.ac.uk/governance/ethics>

Any new data gathering activity for administrative purposes should undertake a Data Protection Impact Assessment. Further information about this can be found on the Privacy by Design page of the Compliance website: <https://compliance.admin.ox.ac.uk/privacy-by-design>. In some circumstances, a DPIA may also be required for research activity: if so, this should be flagged up in the process of gaining ethical approval.

Learning Objective Six - Further assistance and other survey tools

Research Support team Survey Advice Service

If you're a researcher with questions about running a survey, you can contact the IT Services Research Support team for guidance. We can help with selecting the most appropriate survey tool, and with thinking through how you will ensure your survey meets data protection requirements. We're also happy to provide some basic feedback on a draft survey: we'll look out for typos, glitches in the survey structure, or things that aren't clear.

Email researchsupport@it.ox.ac.uk, or visit <https://help.it.ox.ac.uk/survey-advice-service> for more details.

Other survey tools

If neither of the tools covered in this course meets your needs, there are some other options available:

WebLearn and **SharePoint** both include survey tools. These are available to people with WebLearn and SharePoint sites respectively. While these tools have limited functionality, they can be useful for running straightforward surveys of groups within the University.

The Medical Sciences Division runs a **REDCap** service for its members. REDCap is slightly more complex to use than Jisc Online Surveys and Microsoft Forms, but offers more advanced functionality. There is a small annual charge for using the service. For more information, visit <https://www.medsci.ox.ac.uk/divisional-services/support-services-1/information-technology/collaborative-tools/survey-tools>

Some departments or other groups within the University have a subscription to **Qualtrics**, a highly sophisticated survey platform with a range of advanced features. Each subscription is managed individually, so you will need to consult support staff within your department to find out whether you have access to this tool. Qualtrics has been through the University's Information Security team's Third Party Security Assessment process, and has been judged to be suitable for use with all categories of University data.

SmartSurvey is another online survey platform which has been assessed by the Information Security team and judged to be suitable for use with all categories of University data. It offers some features that are not available in Jisc Online Surveys and Microsoft Forms, and while it is not as sophisticated as Qualtrics, the cost of using it is considerably lower. There is no central University subscription to SmartSurvey, so you would need to arrange your own subscription in order to use it.

Many other survey tools exist, but if personal data is being collected, care needs to be exercised. Other tools may not have been through a Third Party Security Assessment, and/or they may not store data in a way that allows the University to meet its obligations under GDPR (for example, they may use servers located outside the EEA). More about the Third Party Security Assessment process can be found on the Information Security website: <https://www.infosec.ox.ac.uk/third-party-security-assessment>, while the Compliance website offers guidance on data protection: <https://compliance.admin.ox.ac.uk/staff-guidance>.

Further information

Getting extra help

Course Clinics

The IT Learning Centre offers bookable clinics where you can get pre- or post-course advice. Contact us using courses@it.ox.ac.uk.

Study Videos from Molly

Molly is our collection of self-service courses and resources. This includes providing LinkedIn Learning video-based courses free to all members of the University. Visit skills.it.ox.ac.uk/molly and sign in with your Single Sign-On (SSO) credentials.

Some courses recommend pre- and/or post-course activities to support your learning. You can watch these online videos anywhere, anytime, and even download them onto a tablet or smartphone for off-line viewing.

If you need a quiet place to work through learning activities away from distractions, the IT Learning Centre offers 'quiet' sessions where you can book a place. These are scheduled frequently during normal term times.

About the IT Learning Portfolio online

Many of the resources used in the IT Learning Centre courses and workshops are made available as Open Educational Resources (OER) via our Portfolio website at skills.it.ox.ac.uk/it-learning-portfolio.

About the IT Learning Centre

The IT Learning Centre delivers over 100 IT-related teacher-led courses, which are provided in our teaching rooms and online, and we give you access to thousands of on-line self-service courses through Molly (powered by LinkedIn Learning).

Our team of teachers have backgrounds in academia, research, business and education and are supported by other experts from around the University and beyond.

Our courses are open to all members of the University at a small charge. Where resources allow, we can deliver closed courses to departments and colleges, which can be more cost-effective than signing up individually. We can also customize courses to suit your needs.

Our fully equipped suite of seven teaching and training rooms are usually available for hire for your own events and courses.

For more information, contact us at courses@it.ox.ac.uk

About IT Customer Services

The IT Learning Centre is part of the Customer Services Group. The group provides the main user support services for the department, assisting all staff and students within the University as well as retired staff and other users of University IT services. It supports all the services offered by IT Services plus general IT support queries from any user, working in collaboration with local IT support units.

The Customer Services Group also offers a data back-up service; an online shop; and a PC maintenance scheme. Customer Services is further responsible for desktop computing services – for staff and in public/shared areas – throughout UAS and the Bodleian Libraries.

Welcome to the IT Learning Centre



You are in the right place ...

... We'll be starting soon

Surveys: Introduction to Jisc Online Surveys and Microsoft Forms

Meriel Patrick
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Ready To Learn?



- Today's session takes place in a video-call using *Teams*
- Can you see and hear the teacher?
- Please tell us if anything doesn't work
- Don't plan to multi-task



Today's resources



- How will you display your workbook?
- Do you have your Jisc Online Surveys password to hand?
- You will also need to have a browser open



Resources for your learning



- **Activities** for you to practice today

In the course handbook
Work at your own pace!
Be selective



- **Videos** with today's topics in Molly

- **Follow-up work**

Continue with exercises after the session
Bookable Course Clinics later



molly
powered by
LinkedIn Learning

Things to consider when selecting a survey tool



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What survey tools are available to me?



- Good to have an overview of the options
- We'll look at two tools today
 - Jisc Online Surveys
 - Microsoft Forms
- Some other tools are mentioned in the final section

What functionality do I need?



- Worth thinking carefully about your specific requirements
 - Range of question types
 - Options for structuring surveys
 - Tools for managing surveys - distribution, analysis, collaboration

Will I be collecting personal data?



- Personal data is any information about a living, identifiable individual
- Needs to be handled in line with GDPR
- Affects both survey tool and data handling processes
- More on this later

What will happen to the data once the survey is complete?



- Analysis in survey tool vs. exporting data
- How and where will exported data be stored?
- What happens when analysis is complete?
 - Data retained - if so how and where?
 - Full copy or anonymised? Can it be shared for reuse?
 - Data deleted - is secure destruction needed?
 - Watch out for copies in Downloads folders!

Do I need to share the survey or the results?



- Different tools offer different sharing options
- Do you want to collaborate on survey creation?
- Do you want to share full or partial access to the results
 - Via the survey tool?
 - As an exported file?
 - More flexibility, but less control over what happens to the data

Do I have a budget available?



- Today's tools are both free to University members
- Others may require payment - especially if you need advanced features

Jisc Online Surveys and Microsoft Forms



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Jisc Online Surveys



- Created by Bristol University - formerly known as Bristol Online Surveys (BOS)
- Designed for use in higher education contexts
- University of Oxford has an organisation-wide subscription
- Help and support articles at <https://www.onlinesurveys.ac.uk/help-support/>

Microsoft Forms



- Part of the Nexus365 suite of tools
- Available to University members via SSO login
- General tool for building forms and surveys
- Support materials at:
<https://support.microsoft.com/en-gb/forms>

Compare and contrast



- Both approved by InfoSec for use with all categories of University data
- Both have the basic features needed to create straightforward surveys
- Quite a bit of difference in more advanced features
- A fuller comparison is in the course handbook

Jisc Online Surveys



- More fine-grained permissions
- More options for structuring surveys
- Distribution tool - for invitations and reminders
- Surveys can be password protected
- Tools for filtering and analysing results
- Create and share customised views

Microsoft Forms



- Has basic question randomisation options - Jisc Online Surveys doesn't
- File upload question (for Oxford-only surveys)
- Surveys can be made Oxford-only (but not otherwise restricted)
- Some integration with other Nexus365 tools

Creating surveys



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Creating surveys - demo

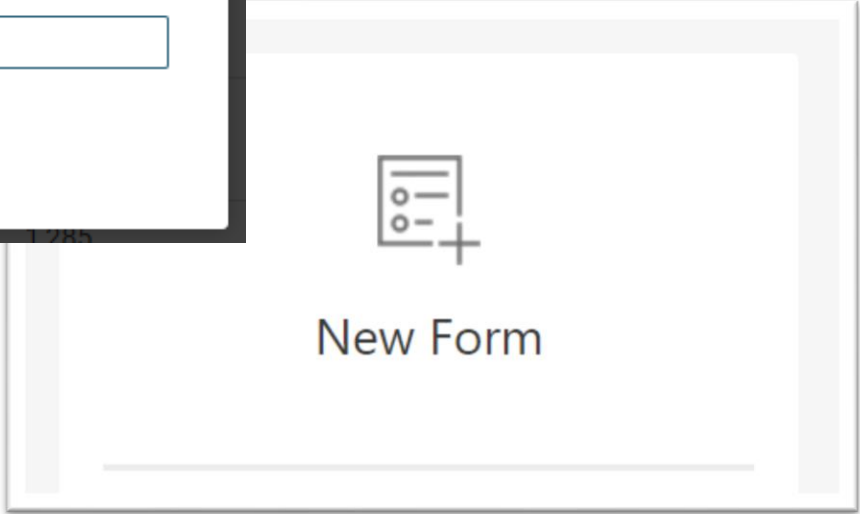


Create a survey ×

Enter a name for your new survey *

Create survey

Cancel



New Form

Have a go!



- Have a go at the exercises under Learning Objective Three in the course handbook
- Try out both tools
- Ask any questions via the Teams chat

Distributing surveys and analysing results



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Distribution and analysis - demo



Launch survey

Launched surveys open automatically on your specified opening date/time.

Analyse

Showing 352 of 352 responses

Showing **all** responses

Showing **all** questions

Options for responses

Accept responses

Start date

End date

Shuffle questions

Responses

7

Have a go!



- Have a go at the exercises under Learning Objective Four in the course handbook
- Try out both tools
- Try out the sample surveys for yourself - links in the Teams chat
- Ask any questions via the Teams chat

Data protection issues



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Personal data



- Personal data is any information about an identifiable living individual
- Needs to be treated in accordance with GDPR
- Selecting a suitable survey tool is important
- But only the first step
- Good data handling processes are also key

Do you need personal data?



- Worth thinking about whether you need to ask for personal data
- Sometimes it's essential; sometimes it's not
- *But* there's a risk of ending up with personal data even if you don't ask for it
 - By combining data
 - Via free text fields

Survey tools and GDPR



- Two key GDPR requirements:
- Data must be securely stored
 - Jisc Online Surveys and Microsoft Forms have both been assessed by the Information Security team
- Data shouldn't be transferred outside the EEA unless safeguards are in place
 - Jisc Online Surveys and Nexus365 both store data within the EEA

Other GDPR requirements



- Don't collect more personal data than is needed
- Only collect data for specified, explicit, and legitimate purposes
- Process data fairly, legally, and transparently
- Store and process data securely
- Don't retain data for longer than necessary

Prescribed information



- When collecting personal data from individuals, GDPR requires you to state:
 - Name of data controller (usually the University)
 - Contact details of data protection officer
 - What will be done with the data, for what purposes, and who it will be shared with
 - Lawful basis for processing
 - The data subjects' rights under GDPR
- This may be in an information sheet or privacy notice - see Compliance website's guidance on [Creating privacy notices](#)

Further resources



- Staff Guidance on Data Protection: <https://compliance.admin.ox.ac.uk/staff-guidance>
- Data Protection and Research: <https://researchsupport.admin.ox.ac.uk/policy/data>
- Research Ethics: <https://researchsupport.admin.ox.ac.uk/governance/ethics>
- Data Protection Impact Assessments: <https://compliance.admin.ox.ac.uk/privacy-by-design>

Further resources



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IT Services Research Support team Survey Advice Service



- Guidance on selecting a survey tool
- Help with data protection issues
- Basic feedback on surveys - typos, glitches in structure, ambiguities, etc.
- Email researchsupport@it.ox.ac.uk

Other survey tools



- WebLearn and SharePoint include basic survey tools
- Medical Sciences Division runs a REDCap service
- Some departments have Qualtrics subscriptions
- SmartSurvey is suitable for confidential data - but requires a subscription
- Exercise caution with other third party tools

Find the resources for the workshop in our IT Learning Portfolio



Download the files (and more)
from the IT Learning Portfolio at

[https://skills.it.ox.ac.uk/
it-learning-portfolio](https://skills.it.ox.ac.uk/it-learning-portfolio)



The screenshot shows the IT Learning Centre website. At the top, there is a navigation bar with the logo and the text "For everyone in the University". Below the navigation bar, there are several tabs: COURSES, TEACHING ROOMS, SERVICES, EVENTS, NEWS, and ABOUT US. The main content area is titled "IT Learning Portfolio" and contains the following text:

Learning resources - as used in our teaching

Welcome to the IT Learning Portfolio of self-service resources. Below you will find a range of resources that you can download and use to develop your IT digital skills for study, research and work. This search tool is currently under construction, and is likely to improve soon - please contact us if you can't find what you need.

Using the resources

Many of the resources described here are publicly viewable, and are open to all visitors. Some are Oxford-only and are only available for members of the University of Oxford who can log in. If you are asked to "login", give your University of Oxford Single Sign-On username and password.

The taught courses provided by the IT Learning Centre are usually open to members of the University to attend. Others can read about them but will not be able to book online for a place on a course. External visitors and alumni can sometimes pay to participate in a course - contact us to request details.

Contact us:
IT Learning Centre
Use our [online contact form](#)
Email us at itlearning@it.ox.ac.uk
Call us on 01865 275100 option 2

Below the text is a search filter table with columns for Audience, Category, Software, and Resource. Each column has a dropdown menu and a search icon. There are also "Apply" and "Clear" buttons. The table lists various resources with search icons to the right of each row.

Audience	Category	Software	Resource	Apply	Clear
3D modelling: Kick-off AND Blender - Up and running (Activity)			After Effects: Animating texts and graphics (Activity)		
Apps for education (Activity)			AR/VR: Augmented Reality for mobile devices (Activity)		
AR/VR: Unity - a practical introduction (Activity)			AR/VR: Virtual Reality for desktop or mobile (Activity)		
Audacity: Recording your voice (Toolkit Activity)			Audio: Recording the spoken word (Activity)		
Beginners IT: Making the most of single sign on (Course pack)			C++: A comprehensive introduction (Course pack)		
Corpora - Why would I use a corpus (Toolkit Activity)			Create an online presence with WordPress (Activity)		
Data analysis: ATLAS.ti (Activity)			Data analysis: Introduction to working with statistics (Course pack)		
Databases: Building a database (Activity)			Databases: Building a database (Course pack)		
Databases: Concepts for project managers (Activity)			Databases: Concepts for project managers (Course pack)		
Databases: Concepts of database design (Activity)			Databases: Concepts of database design (Course pack)		

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