Step-by-step guide to setting up the financial support evaluation survey in the Bristol Online Survey tool

This guide will take you through how to set-up the financial support evaluation survey tool at your institution using the Bristol Online Survey (BOS) tool.

If you do not yet have access to BOS

Get institutional BOS access here: https://www.onlinesurveys.ac.uk/help-support/survey-access-control/. Once you have access to your BOS account it will be linked with your institutional email.

Where to get help

BOS help is available at https://www.onlinesurveys.ac.uk/help-support/exporting-importing-a-survey-structure/. You may also contact Colin McCaig at Sheffield Hallam who developed the tool, on c.mccaig@shu.ac.uk.

Steps to import the survey template

1. You first need to save the '.json' file anywhere onto your computer or network drive [LINK TO JSON FILE ONLINE]. The .json file format is used by BOS for survey templates.

2. Open your BOS account in your web browser. Please bear in mind that your email will be embedded as a 'contact person' for this survey. You can only change this to other BOS registered colleagues. Once they have registered as contact persons they will have access to the account and the .json version of the survey. They can then access survey permissions by clicking on the **View/Edit survey permissions** button; changes can then be made by ticking the functions required and then **Save**.

3. In the main dashboard click on **Import a survey**. This will create a new survey containing all of the financial support survey evaluation questions developed for OFFA by the research team at Sheffield Hallam University.

4. Navigate to and select the '.json' the file from the location saved in step 1.

Steps to add a list of respondents to your survey

1. First you will need to prepare your contact spreadsheet (only .txt or .csv files are supported) in a specific way. Please see instructions: https://www.onlinesurveys.ac.uk/help-support/importing-your-respondent-list/ for full details.

2. In addition to the required fields, you will need to add:

   – **Name** (student's first name will enable the email to be personally addressed i.e. Hello X), under **x1**

   – **Student ID**, under **x2**

3. Continue to follow the instructions at https://www.onlinesurveys.ac.uk/help-support/importing-your-respondent-list/ to upload the prepared spreadsheet that you have saved in .csv or .txt file format to BOS.

4. Continue to distribute your survey, there are different instructions below depending on whether you have under or over 1,000 target respondents.

Steps to distribute your survey if you have fewer than 1,000 respondents

If you have fewer than 1,000 respondents, you can send emails directly from BOS. You will need to add two invisible (hidden to the respondent) questions to the survey. This allows BOS to keep track of who has/has not completed your survey and send personalised emails. More generic instructions on the steps covered below is here: https://www.onlinesurveys.ac.uk/help-support/capture-the-username-email-address-or-token-of-your-respondents/.

1. To add the first invisible question for **name**, click on **Add item** after the final question on the final survey page (the last survey page, not the 'thank you' page). Provided you have not added any questions to the financial support evaluation survey, this will be after Q11 at the bottom of page 4. The screenshot below shows you where to click **Add item** to add this invisible question.
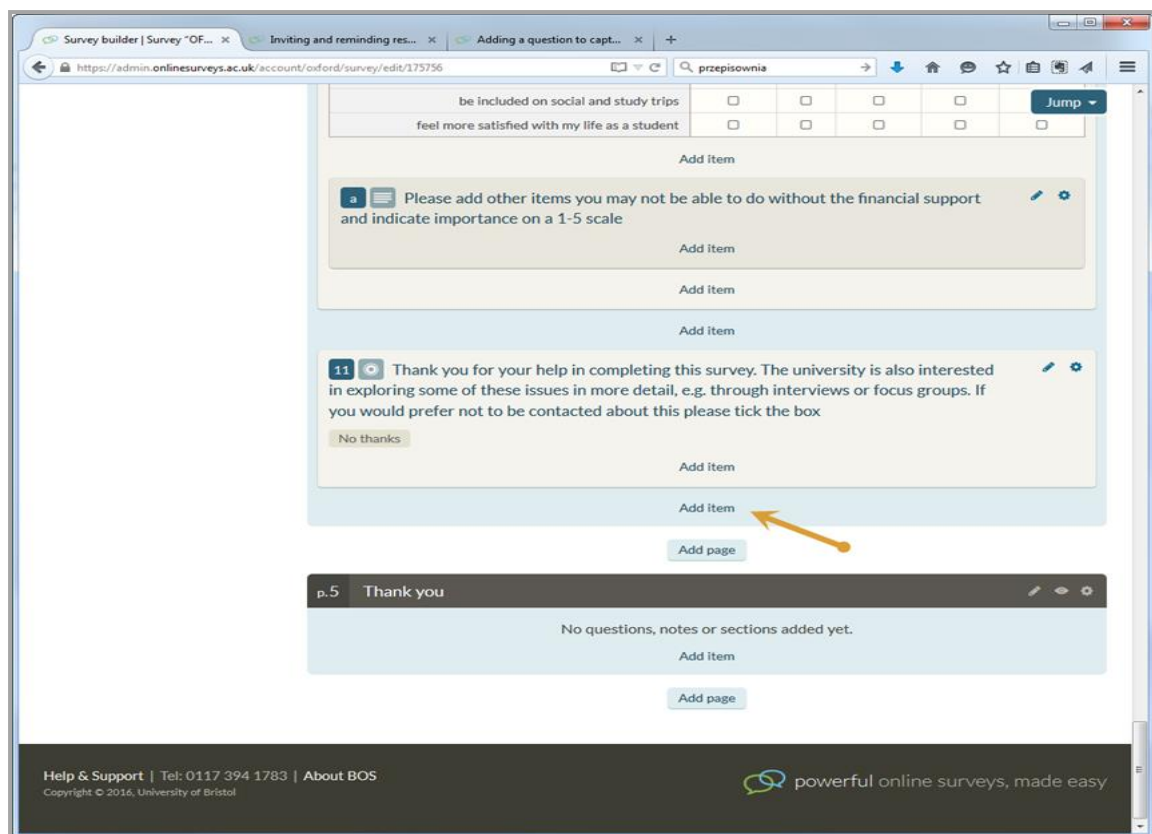
2. Select a **Single-line free text question**

3. In the question text, type **Name**.

4. Click on **Advanced options** and scroll to the bottom of the question editor.

5. In **Pre-population parameter**, select **Name**.

6. In **Question visibility**, select **Always hide question** to make it an invisible question.

7. To add the second invisible question for student id, repeat the last step but clicking on **Add item** below the previously added invisible question.

8. Set this up as for the first invisible question, except using **Student id** instead of name.

9. Now you can launch the survey – more details on this here: https://www.onlinesurveys.ac.uk/help-support/launching-your-survey/. Launching will publish the survey live online, but it will not send any invites yet.

10. Next you need to personalise the emails that BOS sends so it will address respondents by name as previously mentioned. Follow instructions to set this up as a mail-merge in BOS here: https://www.onlinesurveys.ac.uk/help-support/customising-invitation-and-reminder-emails/.

11. Then finally, you can send out your survey. Follow instructions to send email invitations out: https://www.onlinesurveys.ac.uk/help-support/inviting-and-reminding-respondents-using-bos/

Steps to distribute your survey if you have more than 1,000 respondents

You will first need to export your respondent list from BOS. This process creates a unique web link for you to send to every respondent to complete the survey and enables BOS to link each response with individuals in the respondent list. You can then use mail merge in Word to invite your respondents.

Please follow full instructions here: https://www.onlinesurveys.ac.uk/help-support/inviting-respondents-to-participate-in-your-survey/