

User Guide

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# **EUSurvey 1.5.x - Online Delphi Survey**

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# 1 What is an Online Delphi survey?

An **Online Delphi** survey is a special type of survey that applies the Delphi method in order to gather opinions from experts.

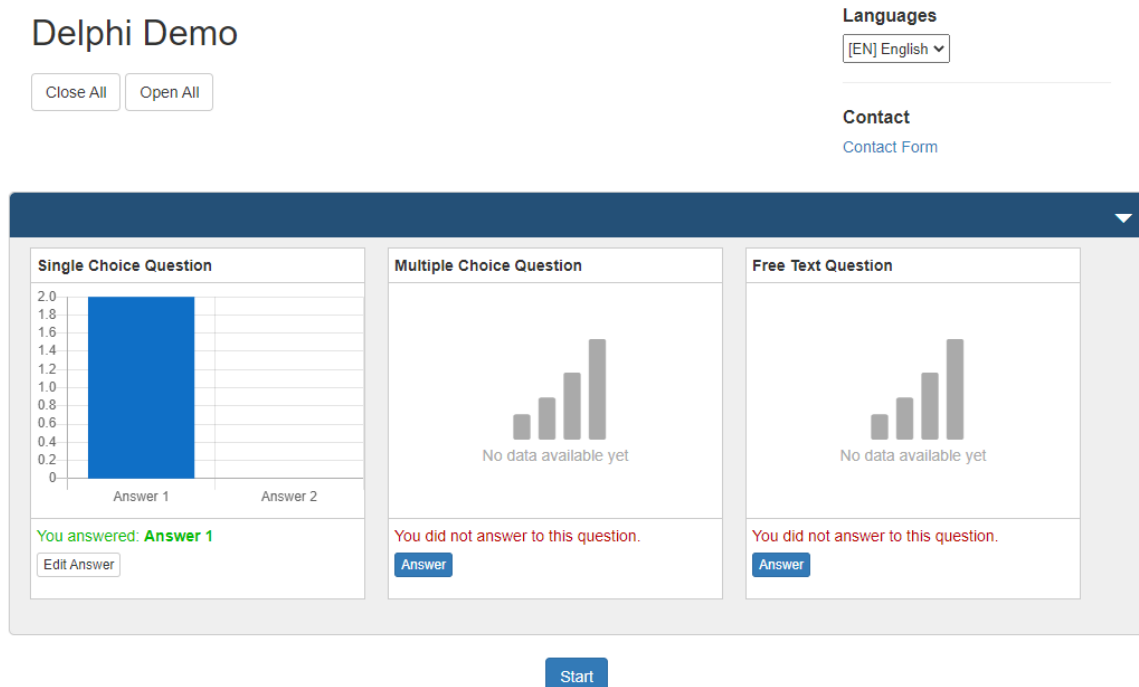
In an Online Delphi survey, the participant can always change his previous answers (even after the submission) as long as the survey is published. However, it is not possible to save draft answers.

# 2 What is the Online Delphi start page?

If a participant opens a link to an Online Delphi survey, the Delphi start page is displayed, showing the structure of the survey as well as statistical data.

The participant can directly see whether he/she already answered to a specific Delphi question. If this is the case - and enough results exist - a chart showing all answers to that particular question is displayed. An expanded view for this chart is displayed by clicking the resize icon  in the top right corner of each chart's box.

The participant can jump to a specific question by clicking the **Answer** or **Edit Answer** button. A click on the **Start** button opens the survey at the beginning. Note that this jump to a question is not allowed if the survey contains mandatory non-Delphi questions.

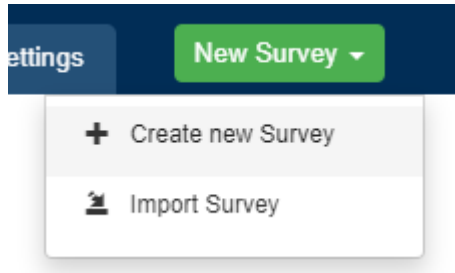


Picture 1 – Delphi start page

## 3 How can I run an Online Delphi survey?

### 3.1 Step 1: Creating an Online Delphi survey

In order to create a new survey, you have to log in as a form manager first. Open the **New Survey** drop-down menu and click the **Create new Survey** option.



Picture 2 – New Survey menu item

A dialog opens where you can enter all necessary data. Make sure to select the **Online Delphi** type in the first row.

**New Survey**

* Type	<div>Standard Survey Quiz <b>Online Delphi</b></div>
* Alias	<div>DelphiSurvey</div> <p>Please choose a meaningful alias (e.g. ACCABCSurvey2020) as it will be part of the URL of the survey. The alias should have less than 256 characters.</p>
* Title	<div><div><b>B I U S</b> <b>10pt</b> <b>A</b> Verdana</div><div>Delphi Survey</div></div>
* Contact	<div>Contact Form name@domain.eu</div> <p>Select a method for the survey respondent to contact you.</p>
Security	<div><input type="radio"/> Open <input checked="" type="radio"/> Secured</div>
Language	<div>English</div>
* Confirmation	<div><input checked="" type="checkbox"/> I confirm that we will inform the EUSurvey Team ({{0}}) if we expect a very high number of responses to this survey (50.000+), so that potential impact can be assessed and measures put in place to deal with the peak traffic.</div>

Create

Cancel

Picture 3 – New Survey dialog

Set the **Security** setting to **Secured** if you do not want your survey to be publicly available. In this case, you later have to invite participants or configure some kind of security mechanism like EULogin or password protection.

Click **Create** to confirm and close the dialog. The survey's editor will open where you can add questions and other elements to your survey.

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## 3.2 Step 2: Adding sections, questions and other elements

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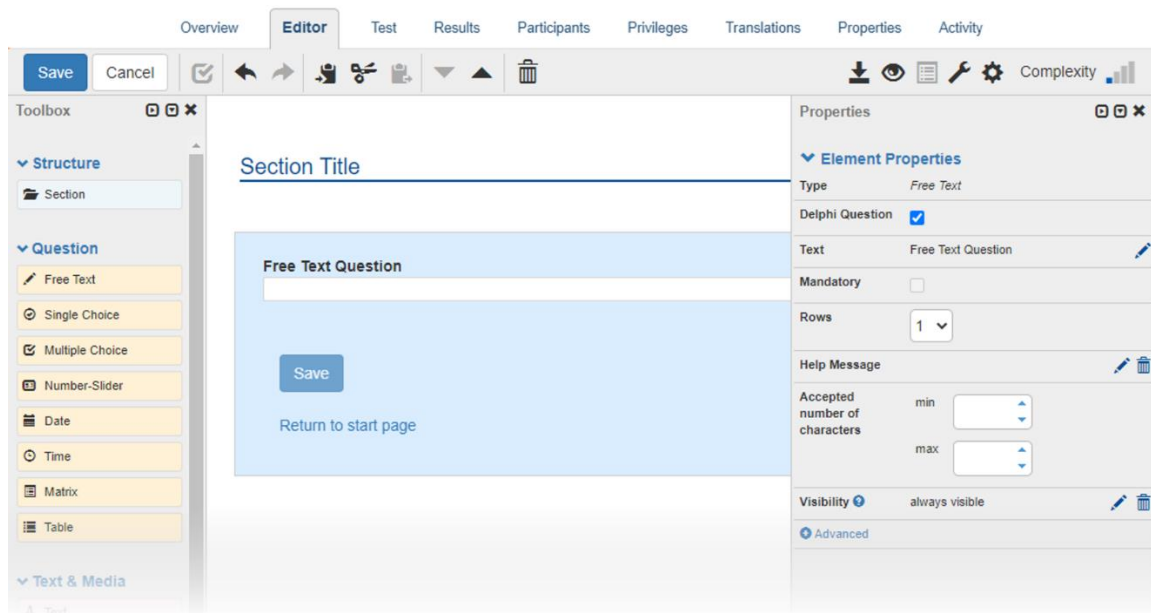
In the survey **Editor** you can drag and drop elements from the **Toolbox** on the left side into the white preview area in the centre of the page. You can use all element types in your survey, but only some types support the extended Delphi features.

Element types with Delphi features are:

- Free Text
- Single Choice
- Multiple Choice
- Number-Slider
- Date
- Time
- Matrix
- Table
- Regular expression
- Rating
- All predefined question types

If you want to disable the extended Delphi features for a specific question (e.g. to ask for personal data of the participant), untick the **Delphi Question** checkbox in the **Properties** area for that question (the element's properties are automatically shown as soon as you select the corresponding survey element). In the preview area the **Save** button below that question disappears. Note that Delphi questions are always non-mandatory.

Use **Section** elements to structure your survey.



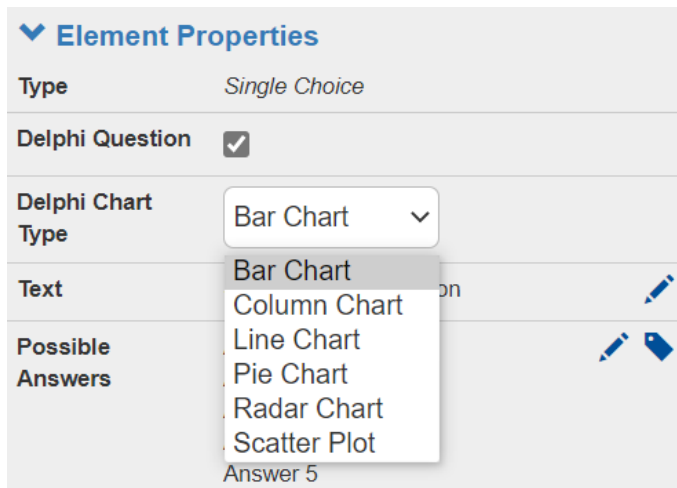
**Picture 4 – Survey Editor**

**Statistics** can be displayed in form of a chart that visualizes all given answers. This chart option is available for the following Delphi question types:

- Single Choice
- Multiple Choice
- Matrix
- Rating

To change the chart type, select one of these Delphi question types and change the **Delphi Chart Type** in the properties area. The following chart types exist:

- Bar Chart
- Column Chart (vertical bar chart)
- Line Chart
- Pie Chart
- Radar Chart
- Scatter Plot

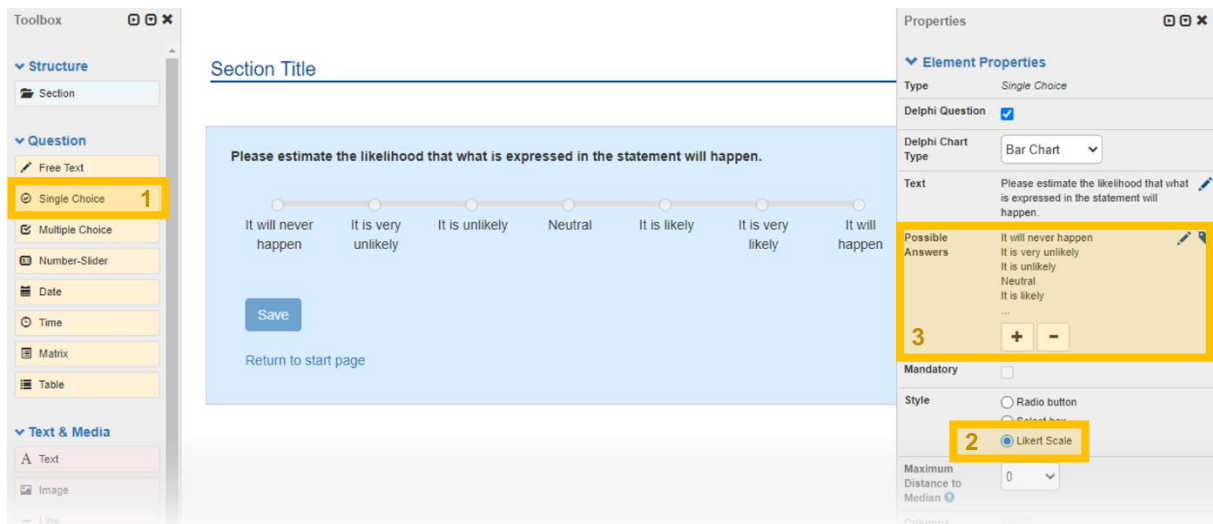


Picture 5 – Available chart types for Delphi questions

### 3.2.1 Likert Scale questions

If you want to add a **Likert Scale** (see [Wikipedia](https://en.wikipedia.org/wiki/Likert_scale) for more details) question to your survey:

1. Add a **Single Choice** question to your survey
2. Set the **Style** property to **Likert Scale**
3. Edit the **Possible Answers** property to set the different steps for your question



Picture 6 – Steps to add a Likert Scale question in the survey editor

### 3.2.1.1 Maximum Distance to Median

Likert Scale questions have an additional property **Maximum Distance to Median** (see [Wikipedia](#) for details about median). The property is set to **Ignore** by default. It can be set to values from 0 to 5. For example, a value of 1 means that a participant's answer to the question is flagged if its distance to the median is larger than 1.

In this context "flagged" means, that the participant sees a red warning icon (▲) on the Delphi start page. An additional information text below the question in the survey itself, indicating that the answer differs from the answers of the group, is displayed as well. The participant is asked to change the answer or to explain his/her decision.

### 3.2.2 Multi-Paging

The form manager can activate the **Multi-Paging** option in the survey's **Properties > Appearance**. When this option is activated each section of the survey is opened on a new page. As soon as the participant continues from one page to the next, all answers (Delphi or non-Delphi) are saved immediately.

Activating Multi-Paging makes an additional property available. The **Validate user inputs when moving to another page** property is beneficial when the survey contains mandatory non-Delphi questions:

- When the validating property is active the participant cannot move to the next or previous page as long as mandatory questions are not answered.
- When the validating property is inactive the participant might not answer the mandatory questions. A warning is shown below the missing question but it is possible to move in between the questionnaire or to leave the page.

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## 3.3 Step 3: Inviting participants (optional)

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If you decided to create a secured survey in step 1 it is necessary to invite participants. Therefore, the survey's **Participants** page offers different options:

- **Contact list:** Create a **Guest List** with contacts from your **Address Book**.
- **EU list:** Create a **Guest List** with EULogin users.
- **Token list:** Create a **Guest List** with tokens.
- Configure the survey to allow all EULogin users to participate.

Please check the paragraph **Inviting respondents** in the [EUSurvey FAQs](#) for more details.

### 3.3.1 Changing a contribution

For secured surveys, the participant can open his/her contribution again by using the same link that was sent to him/her. For open surveys, the participant has to use a special link that is displayed when an answer is saved. The participant can also enter an email address to receive this link by email.

Without this link, it is not possible to open or change a contribution later.



In order to open your contribution again later, please use the following link:

<http://ipmtest12.dialogika.de:8080/DELPHI/editcontribution/a2325ebb-8650-41ad-b027-6e10b8521435>

Send this link by Email

*Picture 7 – Contribution link for open surveys*

## 3.4 Step 4: Publishing a survey

In order to publish your survey, go to the survey's **Overview** page and click **Publish**. After confirmation the system will automatically create a working copy of your survey and put it online along with the translations you selected for publication.

### My first survey

Not published

d1cff382-e313-9512-0356-fbba96ca975d

Published survey link

<http://ipmtest12.dialogika.de:8080/DELPHI/runner/d1cff382-e313-9512-0356-fbba96ca975d>

Owner

John Smith

Starts on

Unset

Ends on

Unset

Answers

0

Results

Not published

Publish

Show pending changes

*Picture 8 – Survey Overview page*

Please check the paragraph **Publishing a survey** in the [EUSurvey FAQs](#) for more details.

## 3.5 Step 5: Analysing Results

In order to see the current state of your survey, you can either open the link to the published survey to see all results or log in as form manager and open the **Results** page of your survey.

Please check the paragraph **Analysing, exporting and publishing results** in the [EUSurvey FAQs](#) for more details.

### 3.5.1 Statistics

For Delphi questions, the statistics view is accessible via the % icon on the Results page. It now shows the question's chart (the same chart that a participant can see in the published surveys) below the statistics table.

The charts use the Delphi chart type that the form manager selected in the survey editor. Use the blue download icon (↓) on the right side of the chart section to download a PNG image file of the chart. The image file can be customised before downloading by using the select boxes:

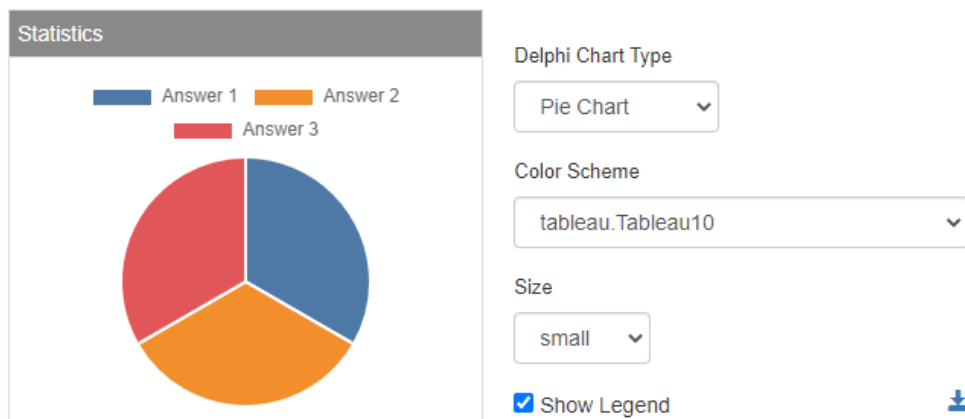
- **Delphi Chart Type** to select a different chart type
- **Color Scheme** to select a different color scheme
- **Size** to change the size of the chart.

Note that these changes are not saved when you reopen the Statistics page again.

Use the **Show legend** checkbox to show or hide the legend inside the chart. This feature is only available for matrix and rating questions and for pie charts.

#### Single Choice Question

		Answers	Ratio
Answer 1	<div><div></div></div>	2	33.33 %
Answer 2	<div><div></div></div>	2	33.33 %
Answer 3	<div><div></div></div>	2	33.33 %
No Answer	<div><div></div></div>	0	0.00 %



Picture 9 – Statistics of a Delphi single choice question

### 3.5.2 Explanations and discussions

By default, the contribution/results table on the **Results** page only shows the answers of a participant. If you also want to show the explanations and/or discussions use the **Settings** dialog and tick the checkbox for the **Explanation/Discussion** element of the corresponding question in the **Show** column.

## Settings

Show Assigned Values	<input type="radio"/> Yes <input checked="" type="radio"/> No
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### Please select the questions to be displayed

Configuration only taken into account for XLS, XML, ODS exports.

<input type="checkbox"/> Show	<input type="checkbox"/> Export	Element
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Free Text Question
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Explanation
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Discussion
<input type="checkbox"/>	<input type="checkbox"/>	Single Choice Question

Picture 10 – Configuration of the displayed contribution/results table

If you want the explanations or the discussions to be part of XLS, ODS and XML exports tick the checkbox in the **Export** column for the corresponding question.

On the **Results** page you can moderate the comments (i.e. discussion). With **Read/Write Access** to the results you can **Edit/Delete** each comment.

	Actions	Single Choice Question	Explanation	Discussion
<input type="checkbox"/>		All Values ▾ ⋮		
<input type="checkbox"/>		Answer 1	Because...	User 1: I am commenting on my own answer. <a href="#">Edit</a> <a href="#">Delete</a> User 1: And I am replying to my own comment. <a href="#">Edit</a> <a href="#">Delete</a>

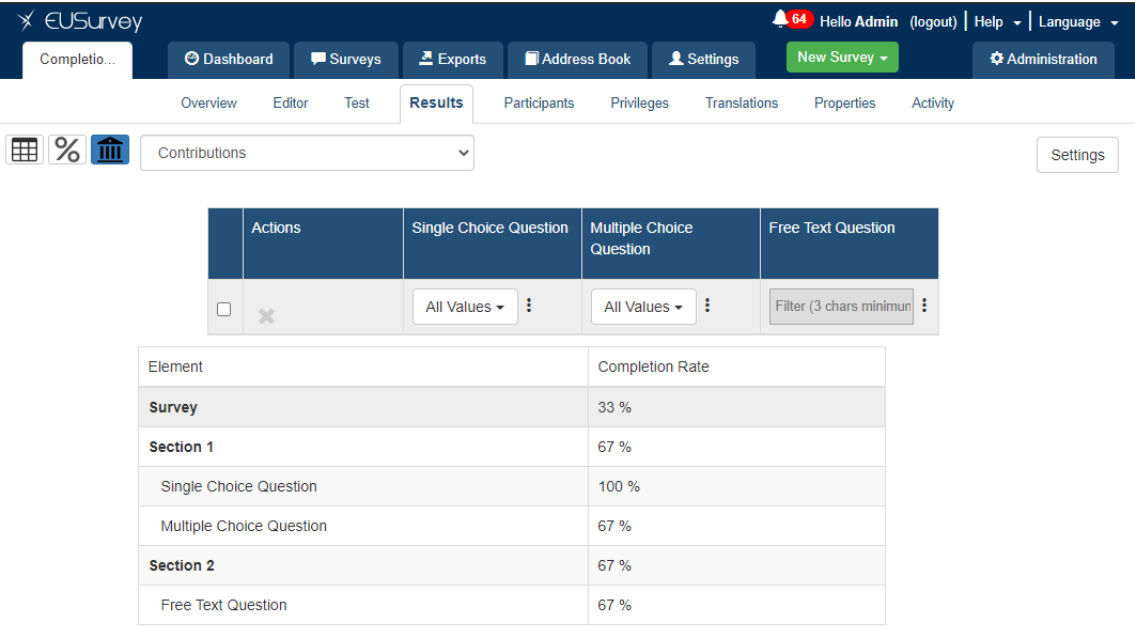
Picture 11 – Contribution/results table

### 3.5.3 Completion Rates

The **Results** page of Delphi surveys consists of three views: **Content**, **Statistics** and **Completion Rates**. You can change the view by clicking the corresponding icon in the top left corner of the page.

The **Completion Rates** view contains a table that shows the completion rate for the whole survey (that means the percentage of participants that answered all questions of the survey), for each section (that

means the percentage of participants that answered all questions of that section) and for each question (that means the percentage of participants that answered that question).



Picture 12 – Completion rate table

## 4 How do I participate in an Online Delphi survey?


### Where do I find available Online Delphi surveys?

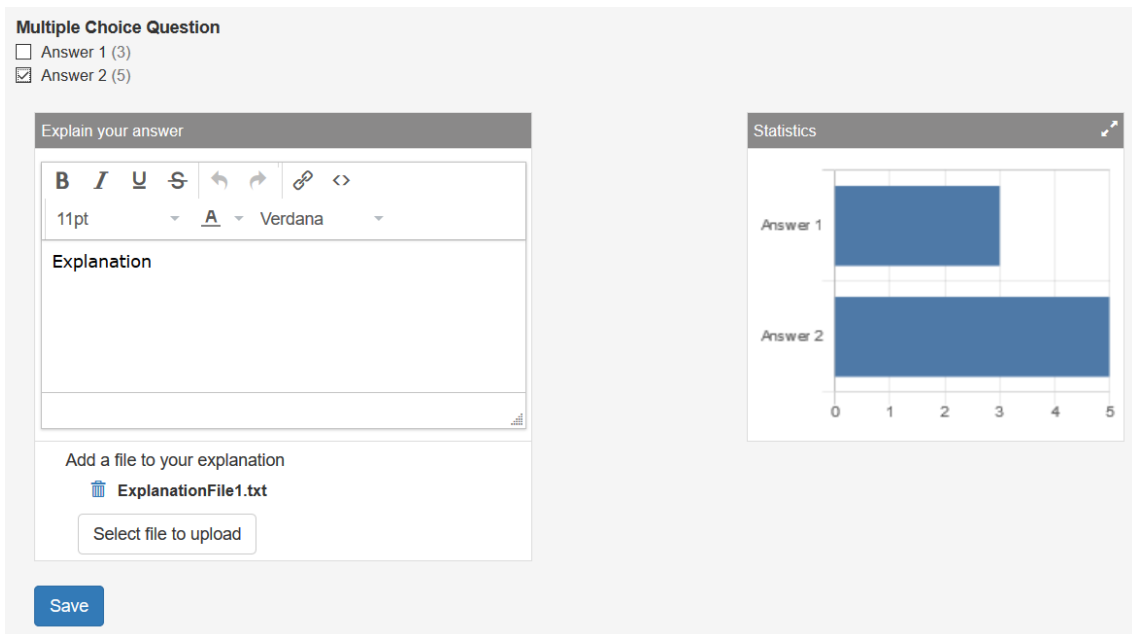
If a form manager has invited you to an Online Delphi survey you got an email containing a link to the survey.

When logged in to EUSurvey you see your personal dashboard. This dashboard contains three parts: **Managed Surveys**, **Personal Invitations** and **Online Delphi Surveys**. If a form manager invited you to an Online Delphi survey you can see this invitation in **Personal Invitations**. In **Online Delphi Surveys** you can find a list of all Online Delphi surveys that are not secured and therefore open to the public.

## How do I submit an answer to a question?

After each question in an Online Delphi survey, there is a **Save** button that saves your answer as well as your explanation. The explanation field appears only after you have answered the question. Additionally, you can upload files to support your explanations.

Once you have answered a specific question (meaning you clicked the **Save** button), you are allowed to see all answers if the form manager enabled this feature and the minimum number of given responses is met. Only then will a chart be displayed that visualizes all given answers to the respective question. You can click on the resize icon  in the top right corner of **Statistics** to expand the chart. Furthermore, the respective number is shown in brackets behind the answer options.



**Picture 13 – Submitting an answer to a Delphi question**

If enabled, you will also see a table that displays all answers, their explanations and explanatory files. These files can be downloaded if you click on the file name.

Answer	Updated on	Explanation	Discussion
Answer 1	09/12/2020 10:27:02	I explain so.	<a href="#">Add Comment</a>
Answer 1 Answer 2	14/12/2020 15:43:26	Another explanation <a href="#">Support.pdf</a> <a href="#">Another document.pdf</a>	<a href="#">Add Comment</a>

**Picture 14 – Results table for a Delphi question**

The chart, the numbers behind the answer options and results table will update once you click **Save** again or reload the page.

Click **Submit** at the end of the survey to save all answers and explanations in one step.

Note that the **Save backup on local storage** functionality is disabled for Online Delphi surveys. Therefore, unsaved or non-submitted data will be lost when reloading the page.

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## I don't see a Save button under the question. How can I save my answer?

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All answers are automatically saved when you change the page (in a multi-page survey) or click the **Submit** button on the final page. That includes Delphi questions that have a **Save** button and non-Delphi questions.



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## How can I add a comment to other participants' answers?

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Comments can be added in the results which can be found below a question in the survey or in the pop-up window that can be opened on the Delphi survey start page by clicking on the **Show all answers** button. For each question you will see an additional **Discussion** column. This is either shown after you answered the question or even before you answer the question depending on the survey's settings.

This fourth column of the table of answers contains a discussion thread for each answer given by a participant. Click **Add Comment** to add a new comment or **Reply** to reply to an existing comment. In both cases a text box is added to the table cell. Enter your text and click the **Save** button to submit your comment. Click **Cancel** to remove the text box again without adding your comment/reply.

Answer	Updated on  	Explanation	Discussion
Answer 1	26/01/2021 13:13:33		<div><p><b>User 1</b> 26/01/2021 14:46:51 This is a comment. <a href="#">Edit</a> <a href="#">Delete</a></p><p><a href="#">Reply</a></p><div><input type="text"/></div><div><a href="#">Save</a> <a href="#">Cancel</a></div></div> <div><a href="#">Add Comment</a></div>

*Picture 15 – Add comment in the results table for a Delphi question*

Note that your actual name is not displayed in the discussion thread. However, the number of the user remains the same if you answer to the survey with the same link again.

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## How can I change or delete my comment?

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Directly below each of your comments you find **Edit** and **Delete** buttons to change or remove your comment.

User 1 26/01/2021 14:46:51  
This is a comment.  
[Edit](#) [Delete](#)

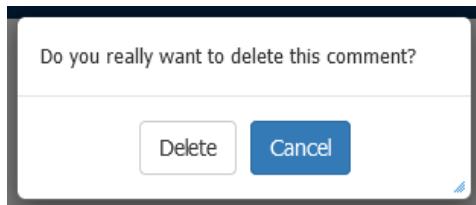
**Picture 16 – Edit/Delete your comment in the results table**

If you click **Edit**, you can edit your comment and save the changes by clicking on **Save**. Click **Cancel** to discard any changes.

A screenshot of a comment box. At the top, it says 'User 1 26/01/2021 14:46:51'. Below that is a text area containing 'This is a comment.' with a small 'x' icon in the bottom right corner. At the bottom of the text area are two buttons: 'Save' (blue) and 'Cancel' (white). Below the buttons is a 'Reply' link.

**Picture 17 – Edit your comment in the results table**

If you click **Delete**, you are asked to confirm the deletion of your comment to make sure that you did not accidentally click on this button. Click on **Delete** to confirm, or click on **Cancel** to discard this action.

A screenshot of a confirmation dialog box. It has a title bar and a main area with the text 'Do you really want to delete this comment?'. Below the text are two buttons: 'Delete' (white) and 'Cancel' (blue). There is a small blue icon in the bottom right corner.

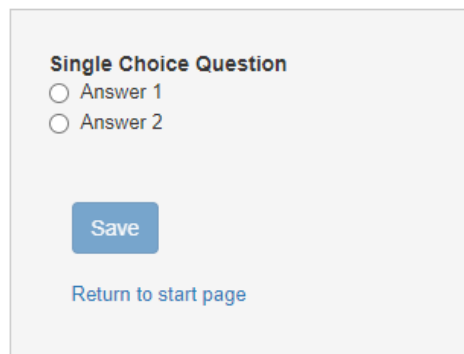
**Picture 18 – Confirm or cancel the deletion of your comment**

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## How can I return to the Start page after I answered a question?

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There is a **Return to start page** link to the Delphi start page below each question's **Save** button.

A screenshot of a 'Single Choice Question' interface. It has two radio button options: 'Answer 1' and 'Answer 2'. Below the options is a blue 'Save' button. Below the 'Save' button is a link that says 'Return to start page'.

**Picture 19 – Return to start page**

## 5 Frequently Asked Questions

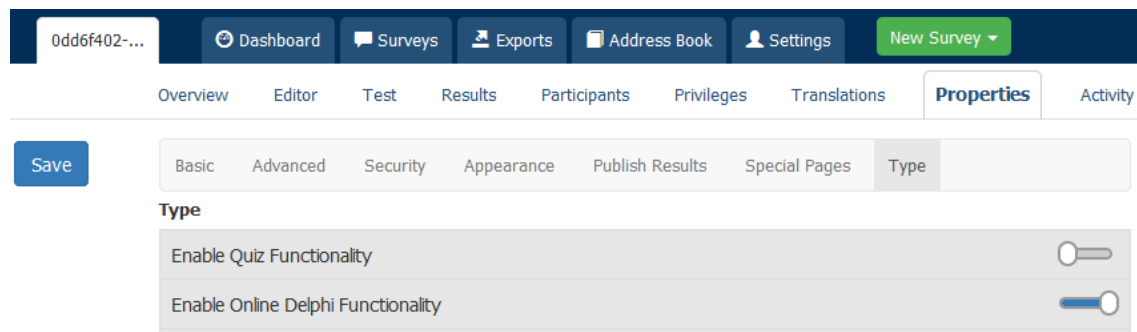
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### I have (accidentally) created a Standard survey. How do I turn it into an Online Delphi survey?

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First log in as a form manager. Select the **Surveys** tab and open the particular survey. You are now at the **Overview** page for your survey. Open the tab **Properties** and select **Type**. Activate **Enable Online Delphi Functionality** by shifting the slider from left to right. Additional properties for Online Delphi surveys will appear. The changes are applied by clicking the **Save** button in the upper left corner.

Note that as an Online Delphi survey is an interactive process the property to **Allow participants to change their contribution** is always enabled for this type of survey.



*Picture 20 – Enable Online Delphi functionality in survey properties*

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### How do I turn an Online Delphi survey into a Standard survey?

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This is very similar to the change from Standard survey to Online Delphi survey. First log in as a form manager. Select the **Surveys** tab and open the particular survey. You are now at the **Overview** page of your survey. Open the tab **Properties** and select **Type**. Deactivate **Enable Online Delphi Functionality** by shifting the slider from right to left. The changes are applied by clicking the **Save** button in the upper left corner.

Note that if you want to change an Online Delphi survey into another non-standard survey type, for instance a Quiz, you first have to disable the Delphi functionality by deactivating the respective slider. Afterwards you can activate the slider **Enable Quiz Functionality** and turn it into a quiz. Changing back from an Online Delphi survey you might consider to switch off the property to **Allow participants to change their contribution**. Do not forget to save your changes.



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## How to configure how answers of a Delphi question are displayed?

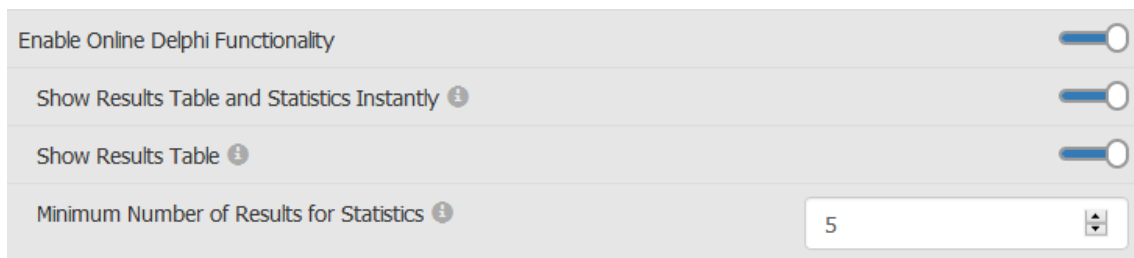
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Open the tab **Properties** of your survey and navigate to the **Type** section.

The results table of a Delphi question will be displayed if you activate **Show Results Table**.

Usually a participant can only see other participant contributions and statistics after he/she answered to a Delphi question. Activate **Show Results Table and Statistics Instantly** to show them even before a participant has answered a question. Note that for this functionality **Show Results Table** has to be active if the results table should be displayed to the participants..

If you want to display the results table only after a certain number of answers were submitted set **Minimum Number of Results for Statistics** to the desired value. Note that this setting is survey specific and cannot be set for each question inside a single survey individually.



Enable Online Delphi Functionality	<input checked="" type="checkbox"/>
Show Results Table and Statistics Instantly ⓘ	<input checked="" type="checkbox"/>
Show Results Table ⓘ	<input checked="" type="checkbox"/>
Minimum Number of Results for Statistics ⓘ	<input type="text" value="5"/>

**Picture 21 – Example configuration of Online Delphi properties**

In the example above statistics of answers to Delphi questions will be displayed if at least five responses were submitted.

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## Why can't I see the answers of other participants to a Delphi question?

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The survey form manager might have disabled this setting or not enough participants have answered this question yet. Additionally, participants may only see other answers if they also answered to that particular question themselves.

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## What happens if I remove my answer to a Delphi question?

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If you remove your answer to a Delphi question your explanation text, your explanation files and all the corresponding comments will be deleted. You will be asked for confirmation before this happens.