

## How do I upload student information into the BOS tracker system?

### Why might you want to do this?

So you can email students with an individual and unique login link to your Tracker, and therefore trace who has and who has not completed it. You can also upload other information about students such as their faculty, grades, ethnicity e.t.c so that this is automatically piped into the tracker spreadsheet of data, ready for you to use this within your analysis after your tracker closes.

### How do you do this?

Simply put, this requires you to upload your student data into BOS, use BOS to generate the unique links, and then either email your students from inside BOS (maximum of 5000 emails can be sent from one tracker survey) OR download the unique links and email them outside of BOS via your mail merge system.

This is advanced feature of BOS, but step-by-step guidance to help you through is given below.

To help with this we have also provided:

- An example CSV file (see attached)
- An example survey with the CSV file already uploaded and the hidden questions already in place, called MASTER UPLOAD EXAMPLE HE Student Digital Experience Tracker. If you want to view this example survey then please email [tracker.support@jisc.ac.uk](mailto:tracker.support@jisc.ac.uk) and confirm your name, email address and institution.
- This process is also covered on the BOS help page: <https://www.onlinesurveys.ac.uk/help-support/controlling-who-can-complete-your-survey/>



## 2. Remove your header row (if you have one) and add yourself to the spreadsheet

Before uploading to BOS ensure that you (a) add a row that is a test row with your email in it, and (b) remove the header row in your CSV file so the file only contains the upload data. See our CSV example.

## 3. Upload your respondent list to BOS


Go to your tracker survey. Click into Distribute / Survey access control. Choose to “create a list of respondents”. Import your CSV file.

(Note that if you want to upload more at a later date you can. Just add onto the original CSV file and upload it again - BOS will ignore those already uploaded).


## 4. Go to Distribute / Survey launch pad

You’ll see a read warning (see screen shot below) that reminds you that you need to create hidden fields in the tracker survey itself that will carry the data from your upload.

Survey launchpad

 This survey cannot be launched due to the following problems: ×

- Access control field **x1** has respondent data defined but no corresponding question has been configured to receive this data
- Access control field **x2** has respondent data defined but no corresponding question has been configured to receive this data
- Access control field **x3** has respondent data defined but no corresponding question has been configured to receive this data

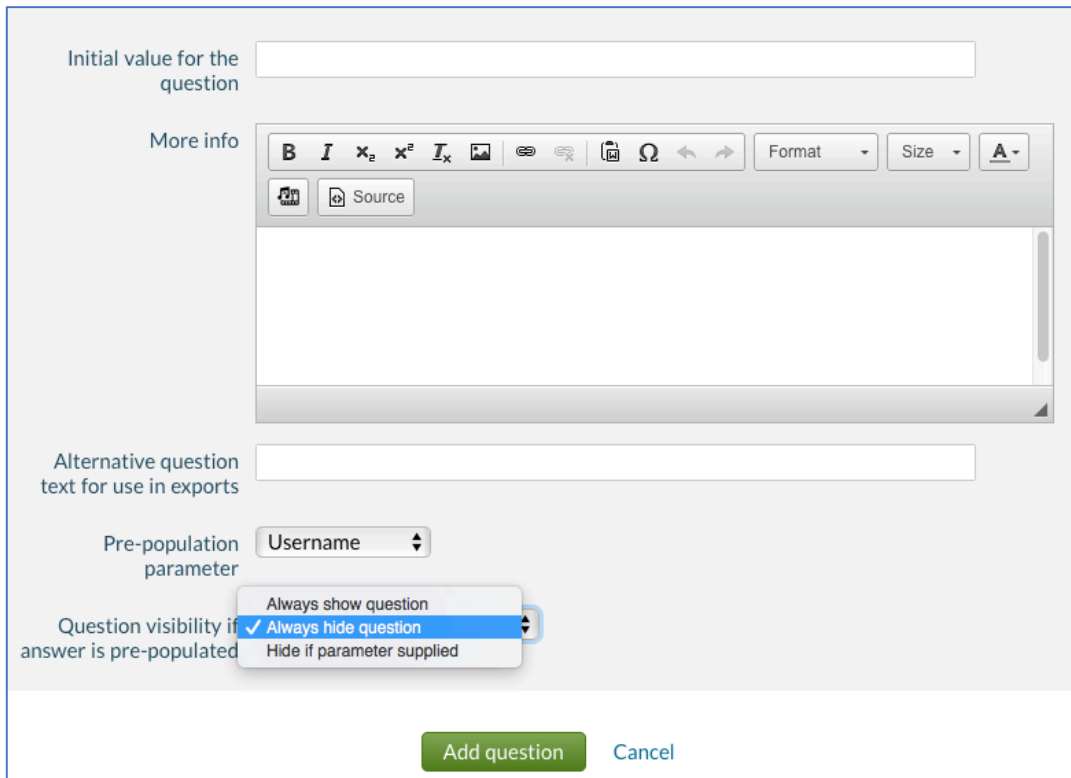
 There are some issues to review before launching your survey ×

- Access control is being used on this survey but no username, email or token question is defined to store this data. The survey will be anonymous (unless respondents provide responses to other questions that can be used to identify them).

## 5. Add the hidden fields into Page 9 of your tracker

For our example we need to add five hidden questions to carry the information from the uploaded respondent list through the tracker survey. These must be placed on Page 9 (customisable page). For each field you need to:

- Add a “single line free text” question at the bottom of the page
- Write the column name as the question text (e.g. “student names” or “student emails”)
- Go to ‘Advanced options’
- Scroll down to the bottom and choose which column of your upload to connect this question to (e.g. for our example ‘username’ column has students' names, x1 has faculty)
- Choose ‘always hide question’ to the “question visibility if answer is pre-populated” (see screen shot below)
- Repeat for all of your columns (in our example there are five hidden questions).
- You do NOT have to create hidden questions for the two blank columns (which become the password and token columns)



The screenshot shows the configuration interface for a question. It includes the following elements:

- Initial value for the question:** A text input field.
- More info:** A rich text editor toolbar with options for Bold (B), Italic (I), subscript (x<sub>2</sub>), superscript (x<sup>2</sup>), Underline (I<sub>x</sub>), Image, Link, Unlink, Omega (Ω), Undo, and Redo. Below the toolbar are icons for Source and a text area.
- Alternative question text for use in exports:** A text input field.
- Pre-population parameter:** A dropdown menu currently set to 'Username'.
- Question visibility if answer is pre-populated:** A dropdown menu with three options: 'Always show question', 'Always hide question' (which is selected and highlighted in blue), and 'Hide if parameter supplied'.
- Buttons:** 'Add question' (green) and 'Cancel' (blue) buttons at the bottom.

## 6. Launch your survey from the Distribute launch pad

## 7. Send students their individual link or password for tracker access

If you have 5,000 or fewer students uploaded...

- Write (and proof read) an introduction email to them in Distribute / Distribution settings / Survey emails
- Go to Distribute / survey launch pad
- Click on “send invitation emails”



If you have MORE than 5,000 students uploaded...

- You need to export their unique email link to tracker, and send them via your own mail merge system
- Go to Distribute / survey launch pad
- Find ‘Unfinished respondents’ and click on “export data” (see screen grab below)
- Open the downloaded file. In the final column you’ll see “URL”. Every student has a unique link to their version of the tracker. This is the URL for you to email out to students via your mail merge system.

### Survey launchpad

<b>Survey status</b>	OPEN
<b>Opening date/time</b>	7 Sep 2017, 12:54 (BST) 1 month, 4 weeks ago
<b>Closing date/time</b>	30 Apr 2018, 23:55 (BST) 5 months, 3 weeks from now
<b>Survey contact</b>	tn@timmuslimited.co.uk
<b>Public survey name</b>	MASTER UPLOAD EXAMPLE HE Student Digital Experience Tracker
<b>Survey short name</b>	master-he-student-digital-experience-tracker-upload-examp
<b>Public URL</b>	<a href="https://tracker.onlinesurveys.ac.uk/master-he-student-digital-experience-tracker-upload-examp">https://tracker.onlinesurveys.ac.uk/master-he-student-digital-experience-tracker-upload-examp</a>

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<b>Completed responses</b>	0 of 4 (0% response rate)
<b>Unfinished respondents</b>	4  Export data
<b>Total respondents</b>	4  Export data

(The End)