

# Operating a Web Panel Sample Service (WPSS)

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[europeansocialsurvey.org](https://europeansocialsurvey.org)

ESS is a European Research Infrastructure Consortium (ESS ERIC)

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# Outline

- Project history
  - Motivations
  - SSHOC WP4.1
  - Functional architecture
- WPSS for the “*Opinion Study for...*” series
  - User roles and features
- Some milestones

# Project history

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# Motivations

SERISS conclusions after CRONOS-1 experiment (2018):

- specific panel management needs
- no off-the-shelf software suitable

References:

Blueprint for comparative web survey (Deliverable [7.7](#))

Summary of existing web panel strategies (Deliverable [7.1](#))

Database system for panel administration (Deliverable [7.9](#))

Web survey platform (Deliverable [7.10](#))

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## SSHOC task 4.1

ESS-SUSTAIN-2 will make use of the tool developed in SSHOC by ESS ERIC and Sciences Po:

**WPSS (Web Panel Sample Service)**



a web application paired with a survey platform to enable centralised management of a cross-national sample for academic studies.



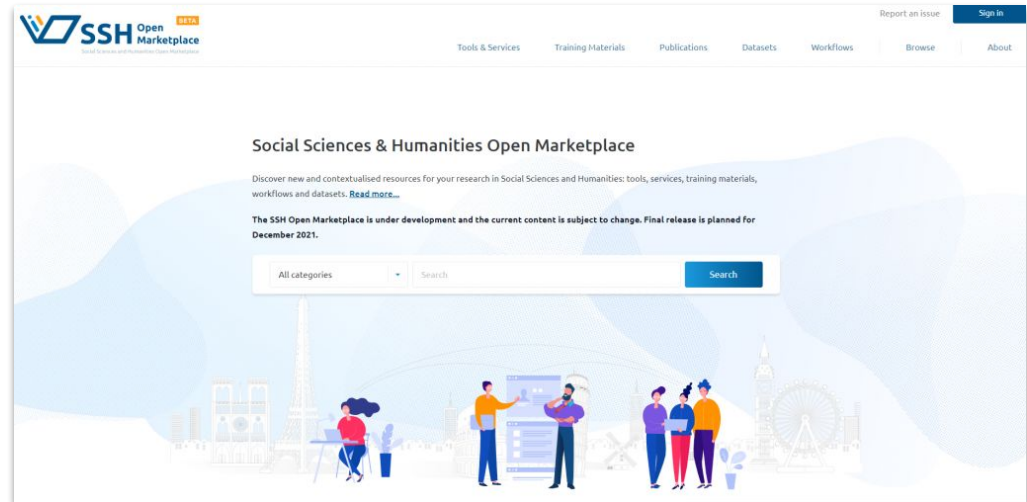
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# Long term goals

The **source code** is meant to be **open** and **easily deployed**.

The software is candidate for the **SSHOC marketplace**.

The user **guide** is available **online**.



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# Functional architecture

First deliverable of SSHOC tasks 4.1 specifies the **functional scope** for "A sample management system for cross- national web survey"

<https://doi.org/10.5281/zenodo.3595981>

Early choice : Qualtrics survey platform



### Content edition



Qualtrics

survey developers



content editors & translators



data archive staff (NSD)



API

### Action triggers Data management



WPSS

headquarters managers



national coordinators

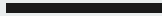
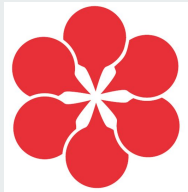


respondents





# **The Web Panel Sample Service for the “Opinion Study for ...” series**



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# Web Panel Sample Service

- WPSS roles
  - Headquarters managers
  - National coordinators
  - Panelists
- Qualtrics roles
  - Survey developers
  - Content editors and translators
  - Data archive staff (NSD)

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# Headquarters features

- Create national samples
  - Set of respondent to which surveys may be distributed
- Manage national coordinator accounts
  - Create accounts
  - Assign NCs to samples
- View a subset of panelist data
- Distribute surveys to samples
  - View content available on Qualtrics (surveys, messages and translation)
  - Send survey links to respondents using email or SMS
  - Follow completion counts



# Headquarters

Entry point for headquarters managers

Panelists

7

[View](#)

Panels

2

[View](#)

National Coordinators

1

[View](#)

Surveys



[View](#)

Messages



[View](#)



Headquarters →

## Panelist accounts

All panelist accounts currently managed by the application

7  
Total

1  
Active

2  
Deactivated

Search

ID ^	Age	Sex ^	Language	Email	Phone	Address	Internet use ^	Opt out	Opt out date ^	Opt out reason	Delete data	Out of country
FR101	33	Female	English	✓	✓	✓	Never	✗		✗	✗	✗
FR123	20	Female	English	✓	✓	✓	A few times a week	✓	24/01/2020 midnight	✗	✓	✗
FR146	41	Female	English	✓	✓	✓	Only occasionally	✗		✗	✓	✗
FR154	22	Male	English	✓	✓	✓	Refusal	✓	25/03/2020 midnight	✗	✓	✗
FR157	20	Refusal	English	✗	✓	✓	Every day	✗		✗	✗	✗



Headquarters → Panels →

# Test NC training

Assigned national coordinators and distributed surveys

## Assign national coordinator

Select managers \*

Assign

## Assigned national coordinators 1

Email	Last name	First name	Action
m@qxsm.eu	Coordinator	National	<span>✖ Unassign</span>

## Distributions

Panel members: 0

No survey distributed to this panel



Headquarters →

# Surveys

All the surveys currently available on Qualtrics

Name	Invites created	Panels concerned	Qualtrics status
<a href="#">Test-2020-NC</a>	2	1 → <a href="#">Panel-for-test-2020-NC</a>	Active
<a href="#">Test_NC</a>	0	0	Active
<a href="#">Survey wave zero</a>	0	0	Active



Headquarters →

# Messages

Messages drafted and translated on Qualtrics

Search

Description ^	Category ^	Translations
Content of the Invitation message NC training	Invite	English (en)
Test Invite Emails NC and HQ	Invite	English (en)
Test reminder emails	Reminder	English (en)
Test General Messages	General	English (en)
First message for the survey	EmailSubject	English (en)
Subject message Test-2020-NC	EmailSubject	English (en)
SMS Invite test 2020 NC training	SmsInvite	English (en)



Flexible survey distribution  
and multi-mode contact

Target panelists \*

- All
- Survey completed
- Survey not completed

Contact mode \*

- Email
- SMS

Select subject \*

Please select one

Select message \*

Please select one

- Fallback contact mode

Select fallback message \*

Please select one

Expiration date \*

2021-02-18 14:46:59



Headquarters → Surveys → Test-2020-NC →

# Distribution Sent

Panels associated with this distribution

 Edit

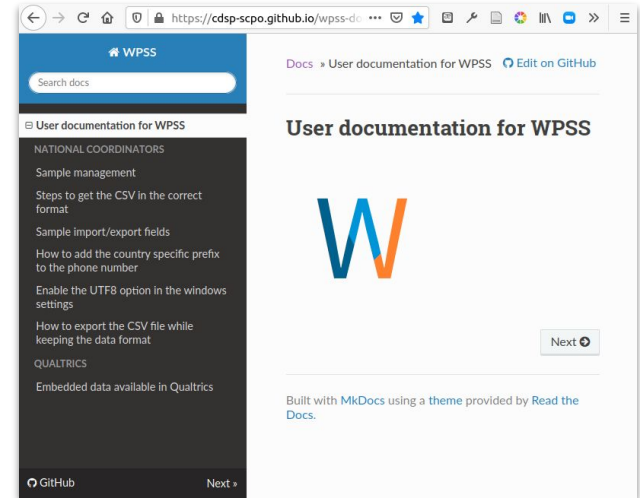
First invitation to survey test 2020 training

Expiration date: 16/01/2021 09:52:56

Panel	Invited	Started	Finished
<a href="#">Panel-for-test-2020-NC</a>	7	1	1

# National coordinator features

- Manage national samples
  - Import and manage respondent personal data
  - Notify respondents of account creation
- Follow survey progress
  - Detailed response statuses



[User guide](#)



[National coordinators](#) →

# Panels

All panels currently managed by National Coordinator

Name	Panelists
<a href="#">Test NC training</a>	0
<a href="#">Panel-for-test-2020-NC</a>	7



Successfully updated panelist **Michel Claire**

National coordinators → Panels → Panel-for-test-2020-NC →

# Panelists

Panelist accounts belonging to this panel

7

Total

1

Active

2

Deactivated

+ New panelist

↑ Import (CSV)

↓ Export (CSV)

✎ Update panel level variables

Search

ID ^	First name ^	Last name ^	Sex ^	Email v	Phone ^	Language	State ^	Qualtrics	Edit
FR984	Stet	Corentin	Male	corentin.stet@gmail.com	+33645678765	ENG	Not notified		
FR158	Dupond	Camille	Other	camille.dupondQT@hotmail.com	+33612345678	ENG	Not notified		
FR157	Michel	Claire	Refusal		+33642159586	ENG	Not notified		



National coordinators → Panels → Panel-for-test-2020-NC →

# Surveys

Qualtrics distributions available for this panel

Survey	Invited	Started	Finished	Status	Action
Test-2020-NC	7	1	1	Sent	<a href="#">Detail</a>



National coordinators → Panels → Panel-for-test-2020-NC → Surveys →

# Test-2020-NC

Detailed responses statuses

Invited: 7

Panelist	Started at	Finished at
Claire Dupond		
Corentin Stet		
Michaud Agnalsy	17 Dec 2020, 10:26 a.m.	17 Dec 2020, 10:26 a.m.
Claire Michel		
Clemence Dupont		
Camille Dupond		
Baptiste Rouxel		

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# Panelists features

- Updating personal contact details
- Getting help: access study description, contact NC, exercise personal data access rights (GDPR)
- Accessing survey links





Opinion Study for France →

# Help

**The Opinion Study for France** is a study of carefully selected people who are asked to give their views on a wide range of topical social issues, such as family life, work, health, the media and politics. The information collected will provide researchers and policy makers (amongst others) with valuable insights regarding the most important topics in our society today.

A new survey will be issued every 1-2 months and you will receive a 'thank you' gift of with each survey invitation.

Only you can complete the survey so please do not share your details with anyone else.

No special knowledge is needed to answer the surveys there are no wrong answers, we just want to know your opinions and experiences.

Your data will be handled in the strictest confidence and in accordance with the General Data Protection Regulation (GDPR).

## Contact us

If you need to get in touch, please contact **National Coordinator** ([m@qxsms.eu](mailto:m@qxsms.eu)/[+33617171717](tel:+33617171717)) quoting reference .



Thank you **Geneviève Michaud**. Your account has been activated.

# Opinion Study for France

Welcome Geneviève

## Latest surveys

20 Jan 2021, 9:24 a.m.

[Test-2020-NC](#)

Not started

## Other actions

[Change your contact details](#)

[Help](#)



Opinion Study for France →

# Profile

Change your contact details

Panelist ID

FR3366

First name

Geneviève

Month of birth \*

10

Year of birth \*

1947

Save

Change your password

Change your email

Cancel



Opinion Study for France →

## Change your email

This page allows you to change the email address linked to your account. We need to ensure that the new address is valid as it is used as a login identifier and as a primary means of communication,

Once you have changed the email address, you will receive a link to validate the new email address. The change will be effective only after the link is clicked. In the meantime, your old email address will still be used for login and communication.

New email \*

New email confirmation \*

Send request

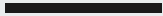
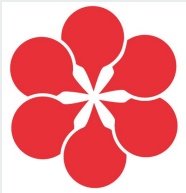
Cancel

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# Qualtrics roles

- [Survey developers and Content editors guide](#)
- [Translators guide](#)
- Data archive staff (NSD)

# Recent and planned events



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# Milestones

November 2019: First pre-production version release (emails only)

used during Austrian and UK pilot pre-test

December 2020: First production release (fully functional, online help and training material)

- ongoing tests, collecting feedback
- planned training sessions for National Coordinators