



# EGI-InSPIRE

## WEB-BASED SURVEY TOOL REVIEW

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### Abstract

A brief investigation into the potential options for executing customer surveys was carried out by UCST in January 2011. As an outcome of the work, the product named 'Zoomerang' is now EGI.eu's recognised tool of choice for conducting customer surveys of any form.



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## II. DELIVERY SLIP

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## IV. APPLICATION AREA

This document is an informal report for internal distribution only.

## V. DOCUMENT AMENDMENT PROCEDURE

Amendments, comments and suggestions should be sent to the authors. The procedures documented in the EGI-InSPIRE “Document Management Procedure” will be followed:

<https://wiki.egi.eu/wiki/Procedures>

## VI. TERMINOLOGY

A complete project glossary is provided at the following page: <http://www.egi.eu/about/glossary/>.



## VII. PROJECT SUMMARY

To support science and innovation, a lasting operational model for e-Science is needed – both for coordinating the infrastructure and for delivering integrated services that cross national borders.

The EGI-InSPIRE project will support the transition from a project-based system to a sustainable pan-European e-Infrastructure, by supporting ‘grids’ of high-performance computing (HPC) and high-throughput computing (HTC) resources. EGI-InSPIRE will also be ideally placed to integrate new Distributed Computing Infrastructures (DCIs) such as clouds, supercomputing networks and desktop grids, to benefit user communities within the European Research Area.

EGI-InSPIRE will collect user requirements and provide support for the current and potential new user communities, for example within the ESFRI projects. Additional support will also be given to the current heavy users of the infrastructure, such as high energy physics, computational chemistry and life sciences, as they move their critical services and tools from a centralised support model to one driven by their own individual communities.

The objectives of the project are:

1. The continued operation and expansion of today’s production infrastructure by transitioning to a governance model and operational infrastructure that can be increasingly sustained outside of specific project funding.
2. The continued support of researchers within Europe and their international collaborators that are using the current production infrastructure.
3. The support for current heavy users of the infrastructure in earth science, astronomy and astrophysics, fusion, computational chemistry and materials science technology, life sciences and high energy physics as they move to sustainable support models for their own communities.
4. Interfaces that expand access to new user communities including new potential heavy users of the infrastructure from the ESFRI projects.
5. Mechanisms to integrate existing infrastructure providers in Europe and around the world into the production infrastructure, so as to provide transparent access to all authorised users.
6. Establish processes and procedures to allow the integration of new DCI technologies (e.g. clouds, volunteer desktop grids) and heterogeneous resources (e.g. HTC and HPC) into a seamless production infrastructure as they mature and demonstrate value to the EGI community.

The EGI community is a federation of independent national and community resource providers, whose resources support specific research communities and international collaborators both within Europe and worldwide. EGI.eu, coordinator of EGI-InSPIRE, brings together partner institutions established within the community to provide a set of essential human and technical services that enable secure integrated access to distributed resources on behalf of the community.



The production infrastructure supports Virtual Research Communities (VRCs) – structured international user communities – that are grouped into specific research domains. VRCs are formally represented within EGI at both a technical and strategic level.

### **VIII. EXECUTIVE SUMMARY**

A brief investigation into the potential options for executing customer surveys was carried out in January 2011 and this report briefly summarises the work and its findings. The aim of the investigation was to review a number of commercially available survey tools from the perspective of ease of use, availability, cost effectiveness and, fitness for purpose (within EGI). The investigation was quickly constrained to an examination of firstly a ‘plug-in’ to EGI.eu’s Content Management System (CMS) and secondly, of the commercially available product ‘Zoomerang’. The ‘CMS plug-in’ was potentially a free of charge addition while a licence to use Zoomerang is already in EGI’s armoury of tools and is thus a logical choice. As an outcome of the work, Zoomerang is now EGI.eu’s tool of choice for conducting customer surveys of any form



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## 1 INTRODUCTION

A fundamental part of any Service Delivery process is the initial identification of 'Customer' requirements in order that the required 'Service' can be correctly tailored to the needs of the Customer or User. The use of Survey tools will invariably be a crucial step during this requirements gathering stage and to this end, the User Community Support Team have briefly examined some of the options available within the context of low cost 'On-Line' customer survey solutions in order to define EGI.eu's Survey Tool of choice.



## 2 INVESTIGATION

### 2.1 Investigation goals

A short investigation into customer survey tools was carried out in January 2011 in order to identify a range of realistic, cost-effective and professional looking survey tools that will be easy for inexperienced staff in EGI.eu to master. It was initially decided that any chosen applications should be able to provide a near seamless interface with the front end of one of the EGI web pages such that Company's corporate image can be an integral part of any deployed survey. Existing and potential customers/users should quickly recognise the provenance of the survey and thus be comfortable that their involvement in the survey was for a genuine purpose. It was also considered important that results of any future survey should be able to be compiled into statistical reports while at the same time maintaining full granularity should there be a requirement to 'drill-down' and analyse individual fields of feedback.

### 2.2 Investigation description

While an internet search for on-line survey tools quickly produced an almost endless hit list of candidate applications, it quickly became apparent that EGI.eu already held a licence for one of the better commercially available survey packages as well as access to a 'plug-in' for its existing Content Management System (CMS). The licenced application is named Zoomerang and this has already been deployed within the EGI.eu for 1 major survey and a few minor internal surveys. Zoomerang promotional information states that for over 10 years they have provided a powerful, self-service alternative for conducting accurate comprehensive online surveys with a minimum of cost and effort. As a pioneer of online surveys, they provide sophisticated functionality and professional survey solutions to organizations including over 70 of the Fortune 100. Meanwhile, the CMS survey plug-in required further customisation before it could be deployed to customers at large. Additional IT support to install and configure the 'plug-in' would also be required and as a result, only Zoomerang was reviewed at this stage.

Under normal circumstances, a robust and complete investigation should start with establishing what the full scope of customer requirements might be. In this case the customers would have been the EGI.eu staff. Because the Zoomerang product is already licenced to EGI.eu, it was decided to drastically de-scope the investigation and thus this normally critical step was not formally executed. Instead, the key features of Zoomerang were reviewed in comparison with other similar products and it was established that the features available would be substantially equal irrespective of which was ultimately used. In short, it was judged that there was little value in investing effort to generate a list of essential and desirable features that would ultimately have little bearing on the outcome.

### 2.2.1 Zoomerang

The Zoomerang survey tool is accessible directly as a web-based product using the following username and password:

Web Login address	https://app.zoomerang.com/
Username	catherine.gater@egi.eu
Password	egi_na2

EGI's user licence is as a "Pro Subscriber" which provides a very complete set of features including email support (but telephone support is charged at an advertised additional \$25 per call)<sup>1</sup>. Licence details are:

Zoomerang Subscription:	
Licence holder:	Catherine Gater
Subscription Price:	\$199
Subscriber Since:	17 Sep 2010
Expiration Date:	17 Sep 2011

The application is relatively straightforward to use; for the un-initiated, the simplest path to gaining an initial level of expertise is to 'have a go' by copying a past survey and modifying/experimenting with it and its various options. Generating questions of various types is led via drop down menus and the deployment of the survey is achieved through a simple step by step process. Trial/draft surveys can subsequently be modified or deleted as necessary. Annex A includes a brief procedure for EGI staff to 'have a go' using a pre-drafted demonstration survey.

An important goal during this review was to confirm that Zoomerang surveys could be deployed in such a way that they carried the EGI.eu corporate image, either by embedding the relevant logos into the survey or by embedding the surveys into EGI.eu material such as the website. Though not immediately transparent, both of these courses of action (and more) are available options as one of the final steps in the deployment process as can be seen from the image beneath:

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<sup>1</sup> Zoomerang Premium provides a small number of further features but at this stage these are not considered to be a cost effective enhancement for EGI.eu.

## How would you like to deploy your survey?



**Direct Link** Generate a direct URL to your survey. You may distribute this link however you like.  
 Prevent respondents from taking this survey multiple times [Learn More](#)

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**Email** Send through Zoomerang's email system. This option allows you to track respondents and send reminders.

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**facebook** Link with Facebook to post a survey link on your wall.

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**twitter** Link with Twitter to tweet your survey.

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**Embedded Survey** Embed your survey directly into your website.  
Width:  pixels Height:  pixels | [Preview](#)  
 Prevent respondents from taking this survey multiple times [Learn More](#)  
 Allow respondents to share this survey with others [Learn More](#)

### Reach 2.5 Million Customers Ready to Take Your Survey

Reach the customers you want to get the insights you need - Zoomerang Sample is the highest quality sample available and is trusted by companies like Procter & Gamble, Match.com, and thousands more. Super fast and easy to reach millions of pre-profiled consumers ready to take your survey!

[Request a Quote Now and Get Started!](#)

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Note that for the 'Embedded Survey' option, there are some minor settings which need to be adjusted to suit the exact format of the parent web-page. At the time of this review, experimentation for embedding the survey within the EGI.eu web page revealed that the optimum width setting was 500 pixels. Nevertheless, deployment of a survey using this option will require close coordination with the Dissemination team who maintain 'ownership' for the EGI.eu website. Other significant setting options (for privacy of results, further distribution of survey, repetitive access etc) are presented in this and successive pages and the outcomes quickly become self-evident during experimentation. Preview options exist at most stages, including at the final "Launch Survey" page.



### 3 CONCLUSION

Because EGI already has a Pro subscription user licence for the Zoomerang product, this investigation was de-scoped to a review of the product itself in order to confirm its fitness for purpose. The Pro subscription of Zoomerang has been confirmed as entirely fit for the envisaged EGI surveying purpose.

Zoomerang is easy to use and previous surveys are available for use as templates. Trialling of a drafted survey is straightforward.

Surveys can be deployed under EGI.eu image/corporate logo as individual items by e-mail or embedded as part of the EGI web-site.

The subscription for the use of Zoomerang is fully paid up by EGI and entitles use of the product through to Sep 2011. It is available to all staff upon entry of the designated username & password.