

# QUALTRICS RESEARCH SUITE IN ACADEMIC CONTEXT<sup>1</sup>

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One of the methodologies to collect data used in the academic context is the investigation surveys by surveys. The Web 2.0 opens a multiplicity of online tools to create and manage surveys without the necessity of installing software. The Qualtrics Research Suite (<http://www.qualtrics.com/>) belongs to this context and is different from other tools because it displays in a very clear, accessible and pleasant way in a free mode, many features to create, distribute and control received answers and data of the surveys. This article describes these tools through a tutorial about the way it works.

Keywords: Web 2.0. Qualtrics Research Suite. Academic context

## 1. INTRODUCTION

Continuing the trajectory of the internet on the following days, we verify that on the beginning of Web 1.0 the contexts were statics, being possible only to navigate from one site to the other through the hyperlinks, but with the Web 2.0 the user becomes an active member and participates on the creation, selection and exchange of context posted in this site using open platforms.

The concept of Web 2.0 is the result of a brainstorming section performed by O'reillyMedia and by the MediaLive International. According to Tim O'Reilly (2006) the Web 2.0 is:

the business revolution in the computer industry caused by the move to the internet as platform, and an attempt to understand the rules for success on that new platform. Chief among those rules is this: Build applications that harness network effects to get better the more people use them. (This is what I've elsewhere called "harnessing collective intelligence.")

In this new platform nominated Web 2.0 the files are available online and can be accessed in any time and place. Besides, there is no need for recording in a determined

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<sup>1</sup> Artigo publicado em português nas Actas do XI Congresso SPCE – Guarda 2011.

computer the registers of a document or to alternate the structure of a text. The changes are done automatically on the Web.

The Web 2.0 technologies represent a revolution as for Web 1.0 in the way of managing and making sense or offering the information in an online mode. Its philosophy differs by its facility and velocity on which it publishes and stores texts and files. It means that the main objective is to make it become a way of allowing a total socialization, making possible to all the users, according to the necessities of each one, to select and control the information (Greenhow, 2007).

The Web 2.0 tools, especially blogs, wikis, podcasts, Google Docs and Spreadsheets, are being targets of study for many investigators (Barroso and Coutinho, 2009; Bottentuit Junior and Coutinho, 2007; Carvalho et al., 2008; Coutinho and Bottentuit Junior, 2008, 2009; Gomes and Lopes, 2007, Gomes, 2008; Machado, 2009a, 2009b, Mota and Coutinho, 2010, among others), however there is a lack of researches that explore other tools as the case of Qualtrics, SurveyMonkey<sup>2</sup>, EnquestaFácil<sup>3</sup>, among others.

The Web 2.0 disposes online tools without the necessity of stalling a software, which means not to occupy any space in the computer's disc as all the function are loaded direct on the browser.

In the sense of using all the available tools on the Web 2.0 and to subsidies the creation of online surveys on the academic research, we present this paper which describes the Qualtrics Research Suite tool through a basic tutorial.

## **2. METHODOLOGY OF DATA COLLECTION: SURVEY BY SURVEYS**

One of the methodologies of data collection used in the field of investigation that "...constitui o meio mais rápido e barato de obtenção de informações, além de não exigir treinamento de pessoal e garantir o anonimato" (Gil, 2002) is survey by surveys. This type of research has as its main objective to collect information strictly patent based on a series of planned and ordered questions that have to be answered by the respondent on hand written

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<sup>2</sup> More information on <http://pt.surveymonkey.com/partners/efax.aspx?cmpid=&mkwid=sH8g9wb48&pcriid=10871107775>

<sup>3</sup> More information on <http://www.encuestafacil.com/>

without the presence of the interviewer, with the purpose to check attitudes, opinions, beliefs, interests, etc... (Gil, 1999; Reis, 2010; Tuckman, 2005).

The researcher while elaborating the questioner shall dedicate a special attention to the process of preparing the questions, selecting each one according to the purpose for what the information is used, the characteristics of the public that is involved in the study and the chosen method used to announce the results. The secret of a questioner lays on its construction and for this, shall be considered the following: (i) the sequence of the topics on elaborating the questions; (ii) writing the questions as natural as possible and make them easy to be understood; (iii) to avoid ambiguous questions or the ones that may suggest or induce to an answer; (iv) each question shall have only one topic to be analysed by the respondent; and (v) the questions shall be related to the objectives of the research (Reis, 2010).

By ethical purposes the questioner shall be anonymous and confidential and can be implemented in an online system. More than this, it shall be evaluated by a process of validation of context and form (Gil, 1999, 2002; Tuckman, 2005), throughout listening to specialists in order to be easier to detect future mistakes and to make their corrections.

### 3. QUALTRICS RESEARCH SUITE

Nowadays we see in the Internet an enormous amount of creation and management tools of online surveys which differ on the way of creating, sending and analysing surveys. Among these tools we find Qualtrics Research Suite, which from now on, we nominate it Qualtrics (Figure 1), that is part of the products offered by the site <http://www.qualtrics.com/>, created in 2002 by Scott M. Smith.



Figure 1- Logotype of Qualtrics

Qualtrics is an online tool that allows creating, distributing and controlling the received answers. Then, managing the data on its free version, offers a variety of functions. Among them we point: (i) there is no limit of time to the research to expire; (ii) almost 100 types of questions; (iii) up to 2 active surveys at the same time; (iv) simple and intuitive interface; (v) possibility of including graphics, Figures and videos; (vi) to personalize the

models of existed researches; (vii) to visualize the results of the research in real time; (viii) to import data from SPSS and Excel; (ix) export reports in 3 shapes: PPT, DOC e PDF; and finally (x) to be available in 11 languages, including Portuguese<sup>4</sup>.

### 3.1 Creating an account on Qualtrics

To use Qualtrics like any other tool from Web 2.0 is necessary to create an account (Figure 2). Just click on “FREE ACCOUNT” insert the email and a password (any that you want) receiving an email from Qualtrics and just click in the link “Please click here to confirm your request”.



**Figure 2- Creating an account on Qualtrics**

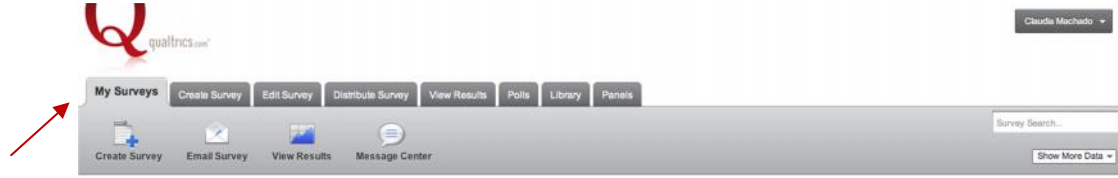
In this case, after creating the account and login it is already possible to visualize the initial interface of Qualtrics, which will be configured by selecting “Account Settings...” (Figure 3).



**Figure 3- To Configurate Qualtrics**

After language configuration, click on the following option “My surveys” and the initial interface will have the following appearance (Figure 4).

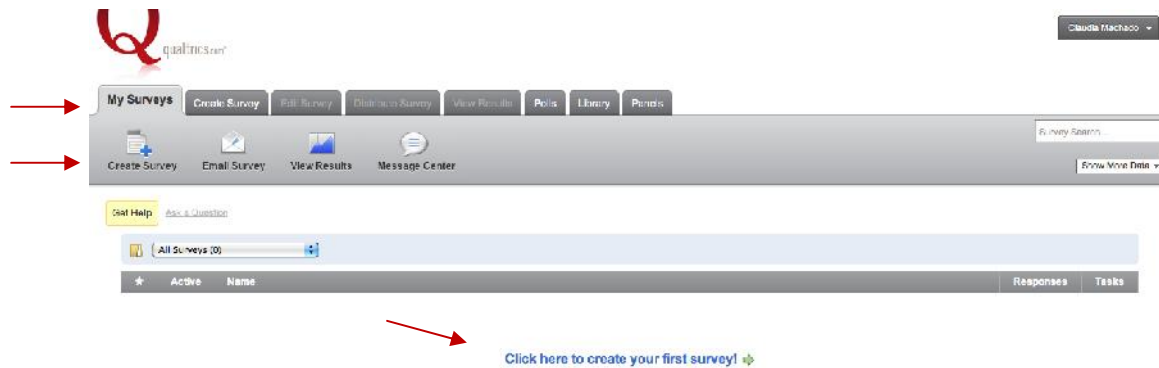
<sup>4</sup> Even though some few options are not translated.



**Figure 4- Qualtrics initial interface**

### 3.2 Creating a Survey

There are 3 possibilities of creating a survey on Qualtrics (Figure 5):



**Figure 5- Possibilities of creating a survey**

After choosing one of the possibilities is already possible to create a survey (Figure 6) using “Quick Survey Builder”. To click on “Click to continue” will open a box requesting the “Survey name” and the “Folder” that will keep it (leave this part blank). Then click on “Create Survey”

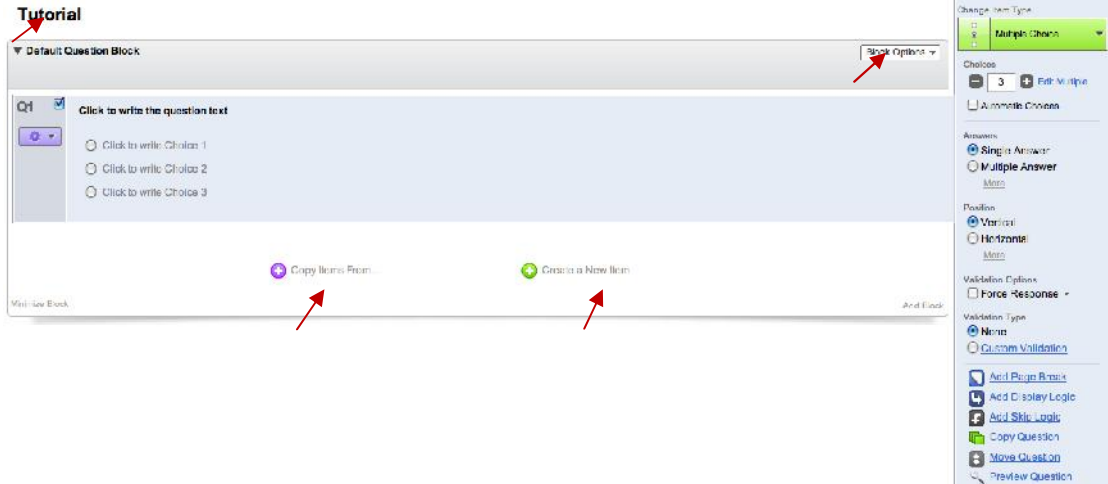
How do you want to build your survey?



**Figure 6- Creating a Survey**

### 3.3 Creating questions

As we can see on Figure 7 will appear the created survey name, a box with “Block Options” and the options “Copy items From...” and “Create a New item”.



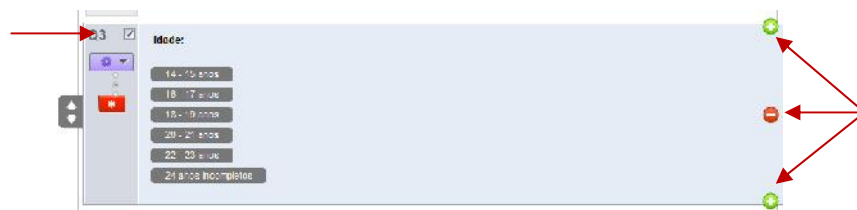
**Figure7- Creating questions**

After creating the question, it is possible to change the text of “Block Options”, of the “question” (to advanced text, click on “Rich Text Editor” available above the question. However, this option only appears when the question text is selected) and the choices, being necessary only to click on the texts.

On the left side of the text of “Block Options” there is a small arrow (▼) where is possible to hide or to show all the questions from this block, only being necessary to click above the arrow. Note that when you click on one question or select the button “Create a New item” the options menus from the right side are open.

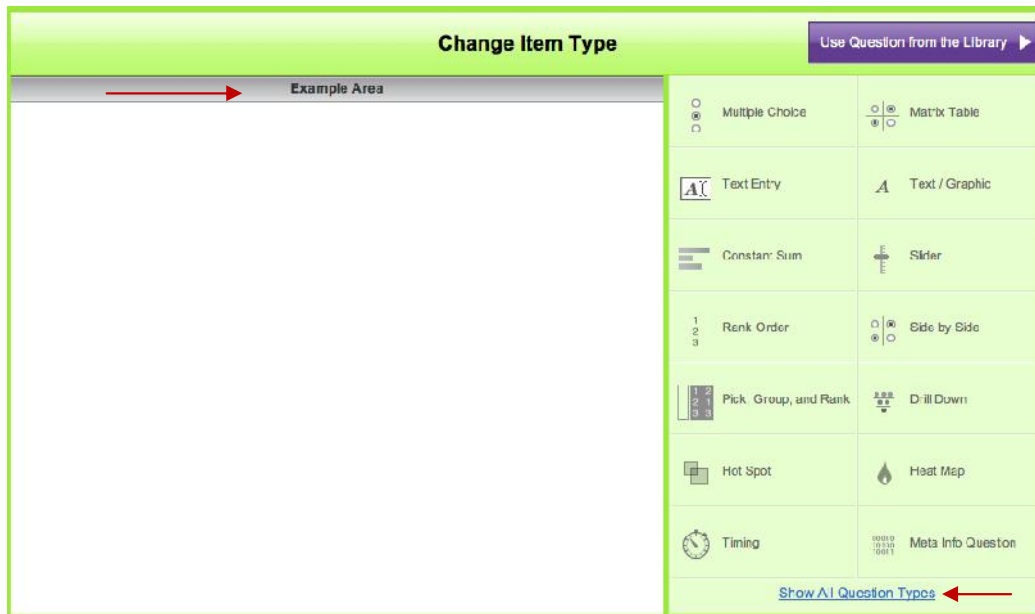
It is advised to primarily choose the type of question in the text. Then changes on the questions and answers can be done.

On Figure 8, is possible to see that for each created question is automatically given a sequential number (ex. Q1, Q2, Q3, etc.), except when is inserted or imported questions from other surveys. There is also the possibility of exclude and add before or after the questions other facts, using the following buttons ( ) e ( )



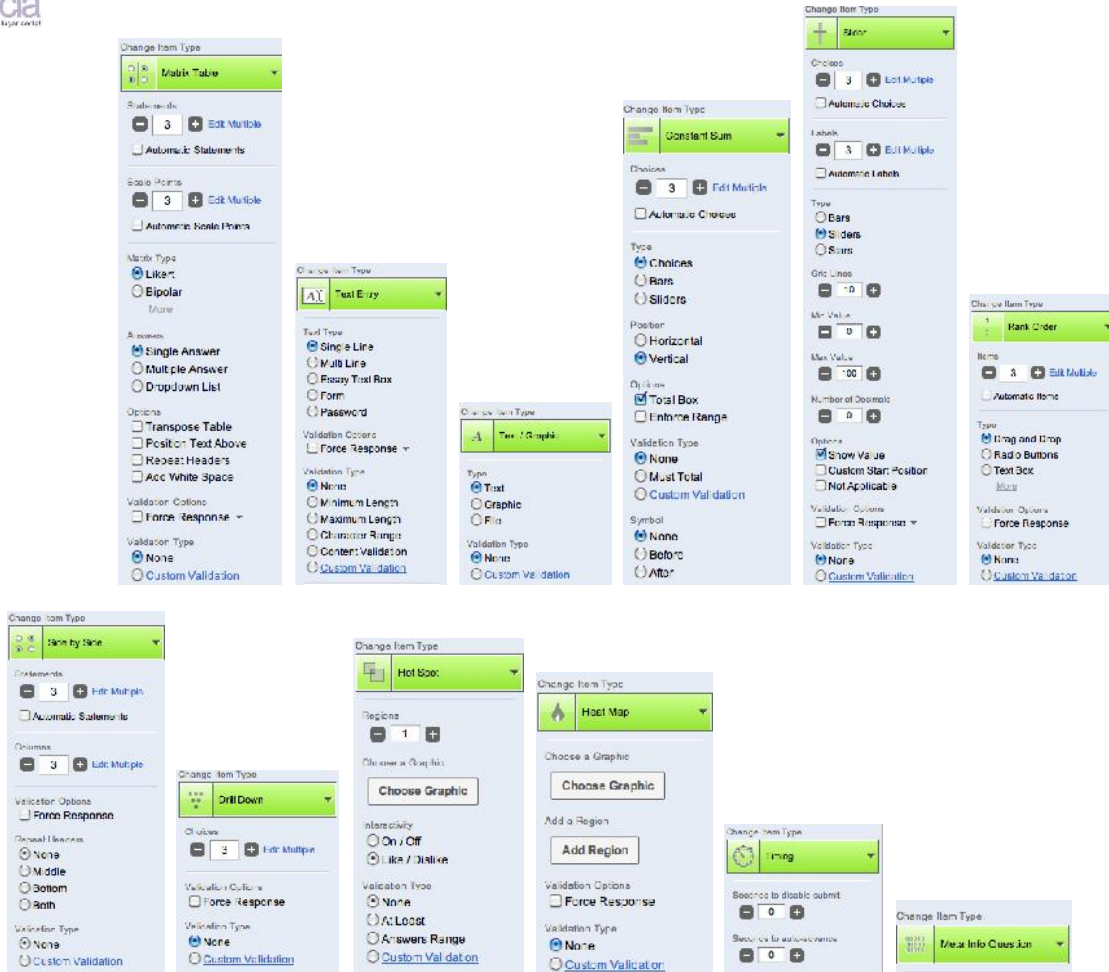
**Figure 8– Number of sequential question and possibilities of exclude or add questions.**

It is possible to define and present better the type of question (Figure 9), thru out the options that are available according to the defined choice at “Change Item type”. It is also possible to visualize in the “Example Area” if you move the mouse on the top of each question as presented on the survey above. And is even possible to “Show all Question Types” e “Use Question from the Library”.



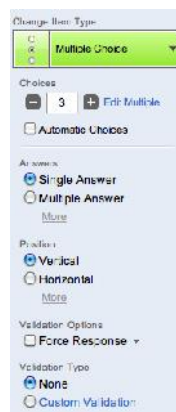
**Figure 9–To define the type of question**

Note that different types of options will be displayed according to the selected question (Figure 10). Among the types of available questions at the free account, there are:





**Figure 10–Available options in each type of question (free account)**

We will use as an example of question “Multiple Choice” (Figure 11) with the purpose of describe each one of the options.



**Figure 11 – Type of question “Multiple Choice”**




- ✓ To add or reduce the number of “Answers” using the buttons  or ;
- ✓ Selecting “Automatic Choices”, allows to choose from one list of available preformatted options the one that is more adequate to the question;
- ✓ To choose “Answers”, the way the respondent can answer the question (if you click in “More” other types will be available);
- ✓ To choose how the answers will be presented (if click in “More” other types will be available) in “Position”;
- ✓ To obligate, if the box “Force Response” is selected, an answer to the question and the button ( ) right below of the number of the question (see Figure 8);
- ✓ To display one error message for an answer if “#Custom Validation” is selected in the option “Validation Type”.

Bellow the chosen questions option, 6 options are available to personalize the survey (Figure12). There is a description below of each one.



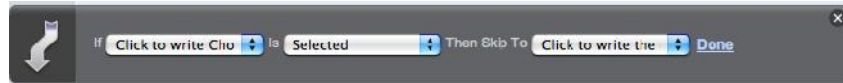
**Figure 12 – Options to personalize the survey**

- ✓ “Add Page Break”– After the selected question immediately choose next page.
- ✓ “Add Display Logic” - allows to define one condition which determine if the selected question shall be presented or not to the respondent.
- ✓ “Add Skip Logic” – allows skipping the survey to the other question according to the given answer without being necessary any kind of indication, as occur in printed surveys, “if answered X skip to question Y”.

Throughout the button (  ) is also possible to choose the options, “Add Skip Logic”. It is advice to build only after all the questions are done. Is advisable to construct a logic only after all the questions are made.

If “Skip Logic” is added, will be then displayed the logic that is given to the question according to the answer that will be chosen by the respondent thru

(Figure13): (i) “If” (displays options given to the respondent to the selected question); (ii) “Is” (display options to execute option “If”); and (iii) “Then Skip To” (present a list of questions previously created besides the option, “End of Block” and “End of Survey”). After creating the logic just click “Done”. The symbol ( ) will be displayed in the indicated question (Figure 14).



**Figure 13 –Options to create logic**



**Figure 14 –Indicated question for the skip Logic**

- ✓ “Copy Question” – allows copying the selected question.
- ✓ “Move Question” – allows moving all the selected questions to the selected block.
- ✓ “Preview Question” – allows seeing how the selected question will be presented to the respondent.

### 3.4 To edit the survey

To edit the survey just select the tab “Edit Survey” (Figure 15) to 7 options to be available: “Look & Feel”, “Survey Options”, “Survey Flow”, “Print Survey”, “Spell Check”, “Preview Survey” and “Launch Survey”. Is important to mention that to the changes be effected is necessary to save all at the end.



**Figure 15 –Tab “Edit Survey”**


Then a brief presentation of each options of the “Edit Survey” will be given.



On selecting “Look & Feel” the options available will be presented and described below (Figure 16).



**Figure 16 – Available Options in “Look & Feel”**

- ✓ (  )–choose one model among the available ones;
- ✓ “General”– change the “Next Button Text” and “Back Button Text”, to insert a “Progressive Bar”, to delimited the number of “Questions Per Page”, pointing the question that the respondent is answering and input “Highlight Questions” and “Question Separator”;
- ✓ “Fonts”– to choose the font and size of the text as for the questions than the answers;
- ✓ “Colors”–to change the text color, the error message, the question separator, the back of the question text, the background,, the highlights, the choice text (answer), of the header, the text entry, the footer, the borders, the Alternate Row (alternated sequence of questions);
- ✓ “Advanced”–to include header, footer and CSS<sup>5</sup>.



On clicking “Survey Options” the user has the chance of choosing between the available options (Figure 17) for the survey:

<sup>5</sup> It is a style language used by programmers.

**Survey Options**

**Survey Experience**

- Back Button. Enable respondents to change their responses.
- Save and Continue. Allow respondents to save and continue later.
- Show Export Tags. Helpful for survey collaboration.
- Use Custom Survey Validation Messages...

Survey Language:  The language the survey is written in.

Survey Title:  This box will appear in the browser as the window or tab title.

Meta Description:  Search engines and social media services use this description.

**Survey Protection**

- Open Access. Allow anyone to take this survey.
- By Invitation Only. Allow only those who receive invitation emails to take the survey (this will reject anonymous links).
- Password Protection. The password must be entered to take this survey.
- Prevent Ballot Box Stuffing. Keep people from taking this survey more than once.
- HTTP Referrer Verification. The user must come from this URL to take the survey.
- Prevent indexing. A tag will be added to the survey to prevent search engines from indexing it.
- Survey Expiration. The survey will only be available for a specified date range.

**Survey Termination**

- Default end of survey message
- Redirect to single response report
- End of survey message from a library...
- Redirect to a URL. In URL, use "http://www.onisbr.com"
- Send additional thank you email from a library...
- Anonymize Response. Do NOT record any personal information and remove panel association (not recommended).

**Inactive Surveys**

- Default inactive survey message
- Display inactive survey message from a library...

**Partial Completion**

How long to wait before partially completed surveys are closed and data is recorded.

Please note, the respondent cannot continue taking the survey once their data is recorded:

After:

**Response Set**

New responses go into:  Manage Response Sets

Response sets allow you to place survey responses into different buckets. For research, quarterly or monthly surveys, so it be collected in different buckets. This allows you to view results of the same survey for different collection periods.

Figure 17 – Survey Options



This option (Figure 18) allows the users to create a logic research much more complex and conditional ways of research. By fault each question created on the survey will be displayed in the flow of the survey.



Figure 18 –Survey Flow



The option “Print Survey” allows to the user to print the survey (if there is a printer installed and connected to the computer).



This option executes orthographical verification on the survey.



On option “Preview Survey” (Figure 19), is permitted to the user to test the survey before publishing it (this option will be open in another window). In order to not register the test as the result of the research is necessary to select the option “Ignore Validation”. If you click on “more options” will be able to select “Do Not Show Hidden Questions” (if available). Also the survey can be restarted thru the link “Click Here to Start Over”.



**Figure 19 –Preview of the Survey**

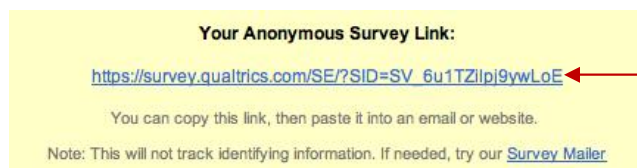


After testing the survey (the one that is not activated) it can be published thru the tab “Edit Survey” clicking on “Launch Survey”. Then, “Activate your survey to collect responses” will be displayed (Figure 20).



**Figure 20 –Activate Survey**

After this, the link of the survey will be displayed (Figure 21). A copy can be made and then attach it to the email that will be send to the respondents requesting participation on the survey.



**Figure 21 – Survey Link**

### 3.5 To distribute the survey

Besides the previous ways already given on how to distribute a survey there are others thru the tab “Distribute Survey” (Figure 22) in which is possible to make: “Survey Link”, “Email Survey”, “Email History”, “Social Media”, “In-Page Popup”, “Website Feedback”, “Survey Director” and “Preview Survey”. On planning the distribution it is necessary to evaluate the desired results and the distribution methods to better reach them.



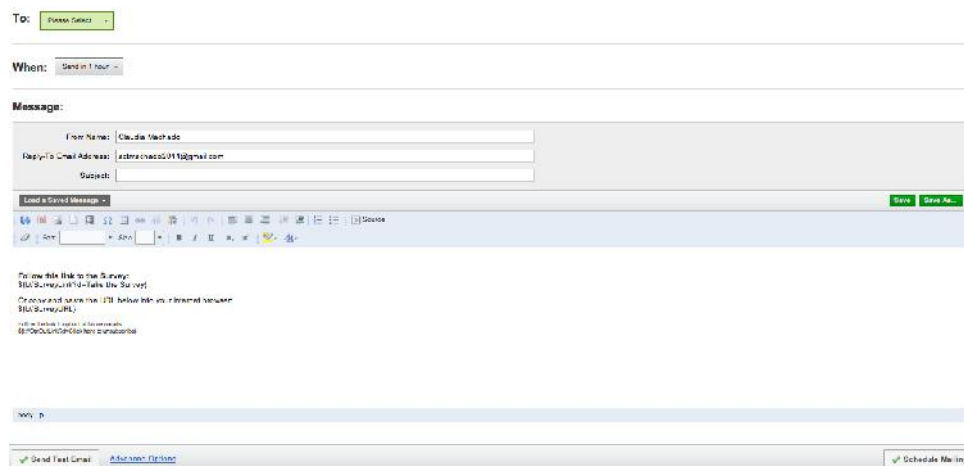
**Figure 22 –Tab “Distribute Survey”**



The generated link (see Figure 20 e 21) may be attached on emails, web pages or documents. Following the link the survey can be directed to the survey.



Automatically generates an email invitation (Figure 23), that allows distributing the survey to a list of participants. Each participant receives a link and a personal identification, which will allow them to be followed. By fault the personal links can be used only once. It allows the majority of the available functions in one email account and to manage sending email and other advanced options.



**Figure 23 –Invitation by email**



On “Email History” (Figure 24), after distributing the survey by email thru the option “Email Survey” (See Figure 23), is possible to “Download Mailing History” (for those that didn’t conclude the research) or “Send Reminder of Thank You” (for those that concluded the research) and “Delete Distribution” thru the bottom ( ) that is bellc of “Actions” (Figure 25). Note that even the option “Edit Distribution” is displayed between the options, it is not possible to perform editions on the free accounts.

Status	Recipient	Subject	Date	Emails Failed	Survey Starters	Survey Finished	Actions
	Claudia Machado	Teste pesquisa	29 May 2011 1:15 PM	0/1	0	0	<ul style="list-style-type: none"> <li> Edit Distribution</li> <li> Download Mailing History</li> <li> Send Reminder of Thank You</li> <li> Delete Distribution</li> </ul>

Showing 1 - 1 of 1

O conteúdo tem uma data de envio.  
 Os emails estão agora a ser enviados.  
 As operações de correio foram concluídas com sucesso.  
 Verificou-se um erro e os emails não foram enviados.

Figure 24 – Option “Histórico”

**Send Reminder / Thank You Message**

Type of email to send:  
 Send Reminder  Send Thank You

When:

Message:

From Name:

From Email Address:

Subject:

Figure 25 – “Enviar lembrete ou agradecimento”



Makes possible to directly distribute the survey thru social networks (if you have an account), plus it also generates an QR Code.



Can use this to display a link to your visitors in a popup (if you have a website).



If you have a web page, you can use this link to get feedback from your users.

This is a distribution resource that allows thru a link to redirect the survey to different places based on conditions already established.



This option allows the user to test the survey before publishing it (see Figure 19).

### 3.6 Seeing the results of the survey.

As the answers are given by the respondents, the results can be seen by selecting the survey or thru the tab “View Results” (Figure 26). After the selection it is possible to choose the desired report and see it “View Reports” (Figure 26). Is also possible to see the total amount of surveys that are concluded (only the already started and finished surveys).



**Figure 26 –Tab “View Results”**

Among the available options on tab “View Results” there are: “View Reports”, “Responses”, “Download Data” and “Cross Tabulation”.



On clicking “View Reports”, is possible to see the options (Figure 27) “Create a New Report”, “Delete” or even select the link “Report Name” which refers to the chosen survey. It is possible see the date of creation, the date it was modified the last time, the owner of the survey and delete the report.



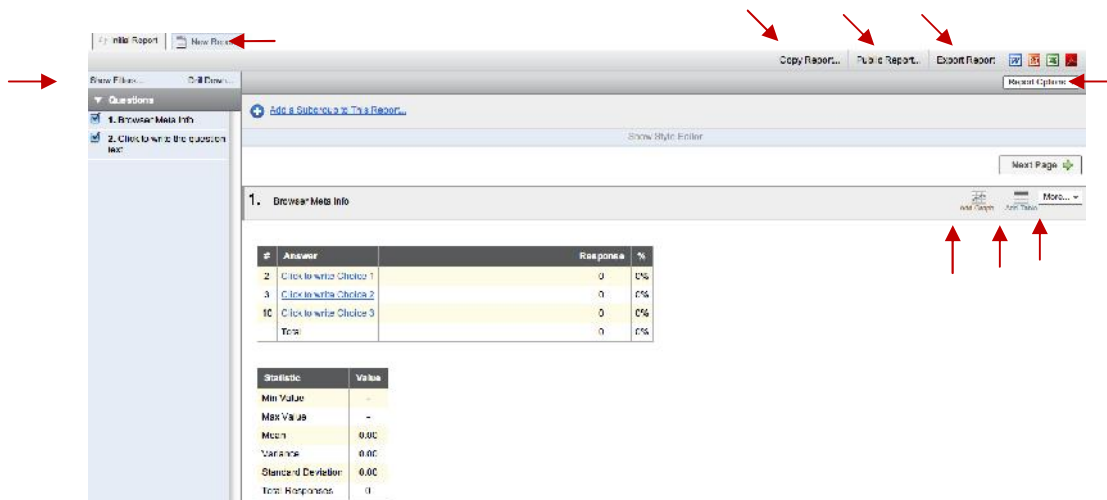
**Figure 27 – Available options for “View Reports”**

Clicking on the link of the chosen report name, a variety of options will be displayed (Figure 28): “New Report”; “Copy Report” that allow to copy the report format that is being seen, “Public Report” that generate a link allowing to exhibit the report publically,



“Export Report” that allows to export thru available buttons to DOCX, PPTX, CSV and PDF; “Add Graph”, located on the superior edge of each question and, after selected, while passing the mouse on the graphics, many options of graphics can be selected; “Add Table”, located next to the “Add Graph” button and , after selected, while passing the mouse on the graphics, many options of table graphics are exhibited; button “More”, located next to button “Add Table”, allows to insert many options and button “Report Options”, found below the button “Export Report”, allows many options.

There is also the link “Show Filters” which is possible to filter data and to generate reports based in answers to questions or incorporated data. The link “Drill Down” that allows to separate all the questions according to the answered question or to incorporate value to the data.



**Figure 28 – Available Options by clicking on the link of the name of chosen report.**



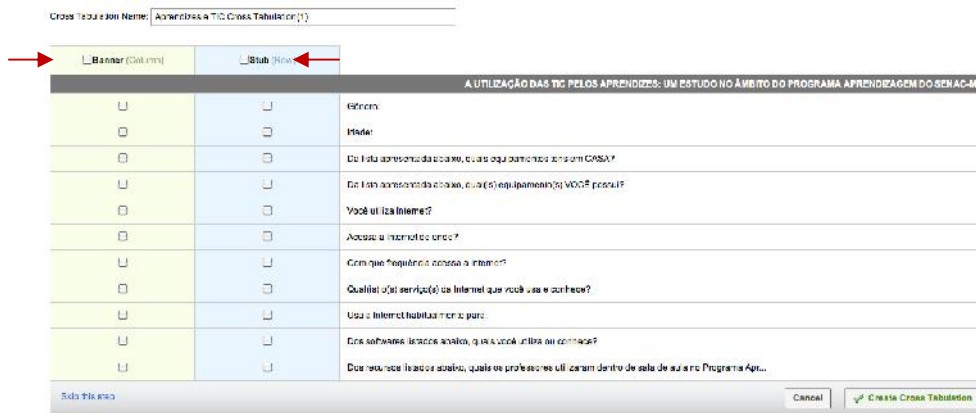
It is possible to research thru results of many categories at “Recorded Responses” (Figure 29), as well as to visualize the given answers to the surveys. Just click on the link of the answer that a pop-up window will be exhibited with the answer of the survey. Also, “Actions” can be chosen for the selected answer thru out the button ( ). On the box “Advanced Options”, is given a list of options to be chosen as answers. On tab “Responses in Progress”, the answers are not included in all the reports until they are concluded or have expired.





**Figure 31 – Create Cross tabulation**

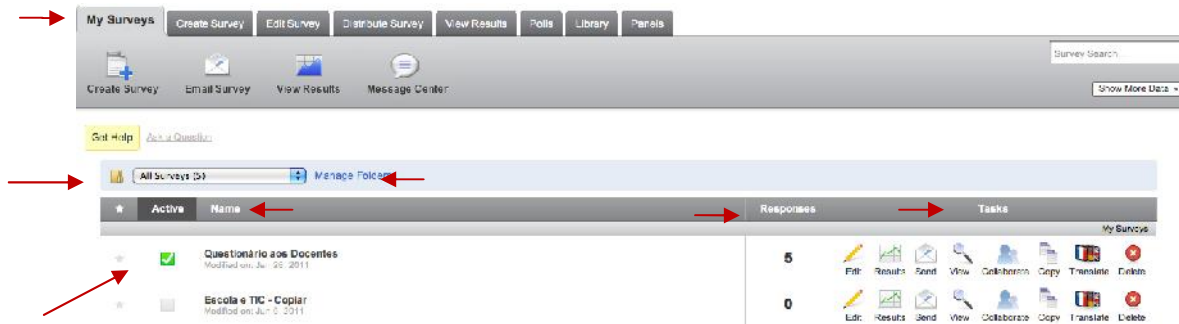
It is possible to select which questions you would like to display (Figure 32) on “Banner (Column)”, and the questions that you want to exhibit in “Stub (Row)”. When you finish selecting the questions, click on the button “Create Cross Tabulations”.



**Figure 32 – Select the questions that you want to exhibit on the cross tabulations.**

### 3.7 After creating a survey

The created surveys (Figure 33) are available on the tab “My Surveys”, as well as the box “All Surveys” with a total number of created surveys and next to the link “Manage Folders”. Is also displayed the button (  ) which indicates the active surveys (for the free account is only possible to activate up to 2 at the same time), the “Name”, the “Responses” gained and a group of 8 “Tasks”: “Edit”, “Results”, “Send”, “View”, “Colaborate”, “Copy”, “Translate” and “Delete”:



**Figure 33 – Created Surveys**

After it is presented each one of the “Tasks” that appear on the tab “My Surveys”.



Edit

On clicking at this button it is possible to directly edit the survey



Results

This button will open the page “View Results” (see Figure 27).



Send

This button will directly take you to the created link to distribute the survey (see Figure21).



View

On clicking at this button, it will allow to see and test the survey before publishing it. (see Figure19).



Collaborate

Not available option to free account.



Copy

This button will create one copy of the chosen survey (Figure34), making possible to choose the “Survey name”, “Copy to”, the “Destination” and the “Folder” in which the survey will be reproduced.

**Figure 34 – Create a copy of the chosen survey**



Translate

Not available option to free account.



Apagar

This button erases the selected survey (Figure 36), but it requests to be typed “delete” and then confirm again in button “Delete”.



Figure 36 – To erase the selected survey

#### 4. CONCLUSION

Inside the academic environment the use of surveys has been a method that allows data collection based in a variety of organized questions. Therefore, as not being an innovation, its utility has now, through Web 2.0, some advantages which are: its low cost, its velocity, its magnitude, its liability, its interactivity and the monitoring of the answers.

Among the free tools of Web 2.0 used to the construction of online surveys on a clear, accessible and pleasant way is found the Qualtrics.

Creating survey with Qualtrics is a very simple task and is not necessary any technical knowledge. Other important fact is that this tool permits not only the construction of surveys but also their distribution, the control Of the given answers and the data management, which potencializes its utilization and importance in many environments specifically the academic one.

#### QUALTRICS RESEARCH SUITE NO CONTEXTO ACADÉMICO

**RESUMO:** Uma das metodologias de recolha de dados utilizadas no âmbito das investigações académicas é a de inquérito por questionário. A Web 2.0 disponibiliza uma multiplicidade de ferramentas online para criar e gerir questionários sem a necessidade de instalar softwares. O Qualtrics Research Suite (<http://www.qualtrics.com/>) insere-se neste contexto, diferenciando-se das demais ferramentas por disponibilizar de forma clara, acessível e agradável na versão gratuita, várias funcionalidades para criar, distribuir, controlar as respostas recebidas e tratar os dados dos questionários. Este artigo descreve esta ferramenta através de um tutorial sobre o seu modo de funcionamento.

**Palavras-chave:** Questionário online. Metodologias de recolha de dados. Investigações académicas

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