

KING FAHD UNIVERSITY OF PETROLEUM AND MINERALS

ICTC Department

User Manual

KFUPM Surveys tool

2020

Contents

1.	Introduction.....	3
	Accessing surveys system.....	4
2.	Quick Start	4
	Step 1: Create a distribution list	5
	Step 2: Creating a Survey	5
	Step 3: Distribute the Survey	6
	Step 4: View Survey Reports	7
3.	Distribution Lists	8
	Import contact list from CSV	8
	Create contact list from Existing contacts.....	9
	Create contact list from KFUPM Community	10
	Create contact list Manually.....	11
	Edit or Delete Distribution List.....	11
	Export Distribution List.....	12
	Delete Distribution List	13
4.	Managing Survey Folders	13
	Creating a new folder.....	13
	Rename folder	13
	Moving surveys to folder.....	13
5.	Managing Surveys.....	13
	Survey Task icons	14
	Create Survey	14
	Distribute the Survey	15
	Survey Reports	17
	Survey Options.....	18

1. Introduction

Surveys system is a web application that facilitates conduct all sizes, ranging from one page to multipage surveys. This system offers a wide feature set, which includes creating a survey for Institutional Surveys as well as for the general purpose surveys. You will find below a list of the main features that the system support.

Unlimited Surveys and Questions

Create unlimited surveys with any number of questions you need. No limit on Surveys, Pages, Questions, Collectors, Responses, and Reports. It is truly an unlimited tool.

Multi Language Support

The system supports multi languages survey interface.

Charts and Graphical Analysis

The system is using various efficient charts to analyze your responses graphically. You have Donut, Pie, Bar and other types of graphs for every question and its responses.

Skip Logic (Decision Making)

Skip logic is a very powerful feature that helps you to build an intelligent questionnaire. It allows you to design custom paths for the participants based on how they answer a particular question. This helps the participants to utilize their time diligently on more appropriate questions.

Questionnaire Templates and Samples

We have built templates for popular surveys. You don't have to stress yourself to design and develop your survey, simply search and create your survey in no time. Once you have created the survey using template, you can customize the survey for your need.

Export Reports as PDF, CSV, Excel.

The system offers you to export your survey responses in pdf, csv, and excel formats. This will allow you to email, print, transfer or share your survey results with anyone you wish.

Types of Questions

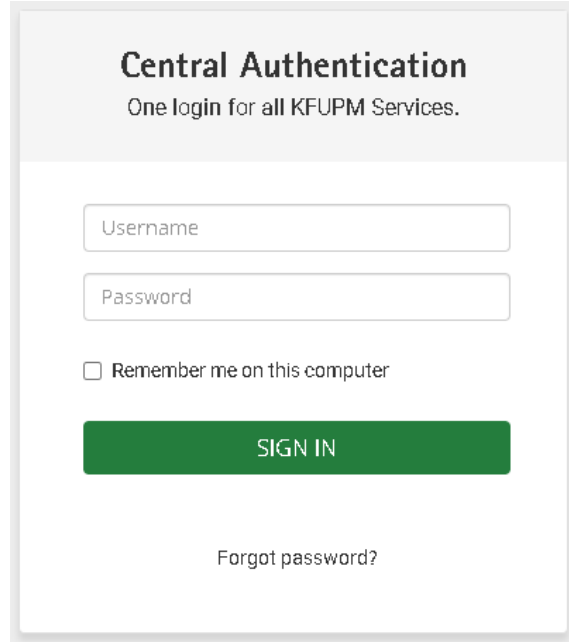
Available question types are Single Choice, Multiple Choice, Matrix of Choices, Matrix dynamic question, Dropdown menus, Rating Scale, Single and Multiple Text Boxes, Image choice, File upload, Rich HTML Tool, Microphone, Date Type, Essay Box and Descriptive Type.

Different ways of Survey Creation

You can search a template and create a survey from most suitable template. You can clone your existing survey into new survey (Duplicate Survey). You can also build the whole survey from scratch.

Accessing surveys system

Go to <https://surveys.kfupm.edu.sa/> into your web browser and enter your kfupm login in credentials.



The image shows a login form titled "Central Authentication" with the subtitle "One login for all KFUPM Services." It contains two input fields for "Username" and "Password", a checkbox for "Remember me on this computer", a green "SIGN IN" button, and a "Forgot password?" link.

Note:
To be able to access and use the surveys system for the first time, please create an E-desk ([KFUPM Surveys Account/Activation](#)) request to grant you the required access.

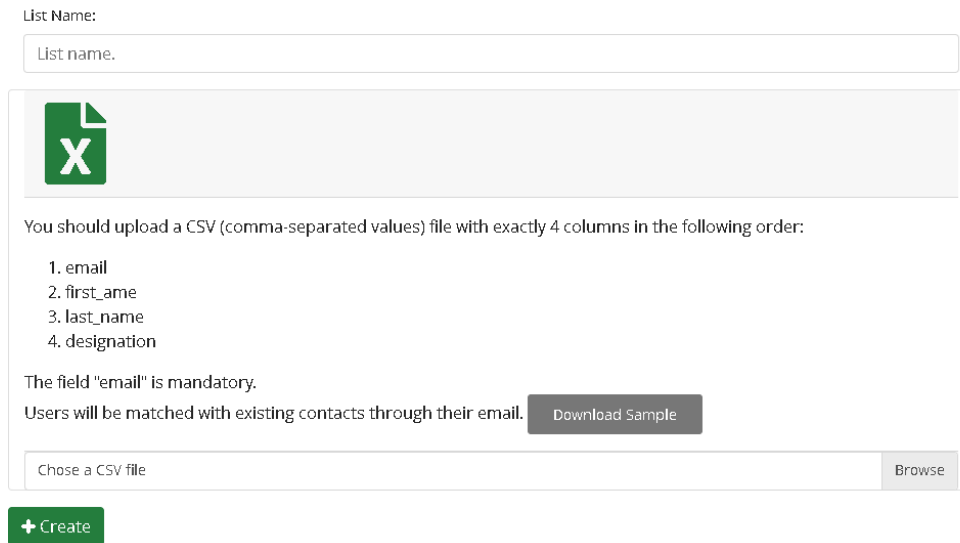
2. Quick Start

As shown in below figure, this section shortly describes the minimal steps needed to create a survey and collect the responses. Other features are detailed in the next sections.



Step 1: Create a distribution list

A distribution list is a list of contacts. It contains the Email, First Name, Last Name, Demographic information and Designation for each contact. To create a distribution list click on manage contacts button on the right. Then you will find different ways to create a list. The easiest way to create a distribution list is to import the contacts from a CSV file. CSV files can be created using Excel. You can download a **sample contacts file** and edit it to match your intended list of contacts. Fill in the form providing a name for the list, and browse to find the csv file that contains the list. After submitting the new list name will be shown on the page. Now you are ready to move to step 2. (Figure 1)



List Name:

Figure 1: import contact list from CSV file

Step 2: Creating a Survey

The easiest way to create a survey is to **clone** one of the templates and modify it to suit your needs. On the [main page](#) expand the *Templates* section then click on one of the templates to start cloning it.

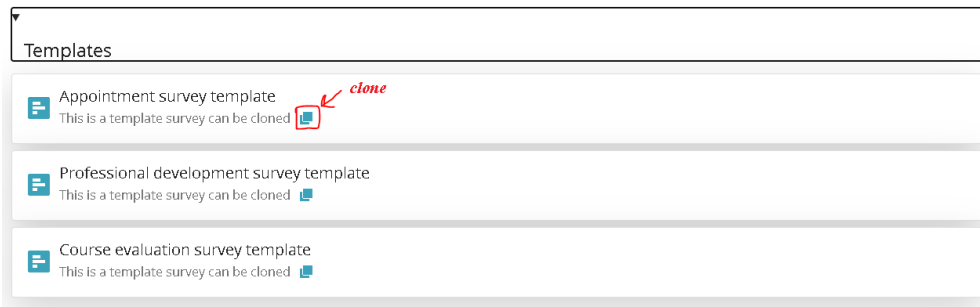


Figure 2: Templates section

Fill in the form providing a name and description for the survey and chose the distribution list that was created in step 1. (Figure 3)


Survey Builder

Survey Name: <input type="text" value="Survey name."/>	Description <input type="text" value="Short description about the survey."/>	Allow non members	Enable Save and Continue Later	Choose distribution list
Available On <input type="text" value="date"/>	Available Until <input type="text" value="date"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 3: survey builder fields

To modify a question, click on the question to show Edit button. Clicking this button pops up the properties editor for the question. After all modifications click on Create Survey button. The survey will be shown on the page. Now you are ready to move to step 3.

Step 3: Distribute the Survey

To distribute the survey, invite your contacts to fill the survey by sending each of them an email with the survey link. To do that, click  on near the survey name. If this button is not shown this means the survey is not active [Edit](#) it to change the dates. (Figure 4)

This opens the distribution form to fill the email subject and message. Note that the words preceded by \$ like **\$FirstName** will be replaced by the contact information. Please don't modify these words, you can move it anywhere to rephrase the default message but you should keep the same spelling as is. Please don't remove the word 'link' as it holds the survey link. If you like to modify the word 'link' to 'here' for example, double click on the word 'link' to popup a form to replace it by 'here'.

You can schedule up to two reminder messages to be sent to the recipients who didn't fill the survey. Click Reminder checkbox to schedule and set the reminder message. Click on Send Message button to send and schedule reminders.

Invite Users To Fill

Subject:
Responding To Professional development survey

Receivers:


Message:

Dear \$Designation \$FirstName \$LastName
Please fill \$SurveyName survey on the following [link](#)

Reminder:

Figure 4:Distribution form

Step 4: View Survey Reports

After collecting the survey answers, a report of submissions can be viewed by clicking on  icon near the survey name. This opens the survey report page. The progress bar on the top of the page shows the percentage of responses collected to the invited contacts. Below that there are three tabs. The first tab contains visualization graphs for the survey answers for each question. The second tab contains a table of the answers with option to export to different formats. The third tab contains a tool to view the interactions between different questions. (Figure 5).

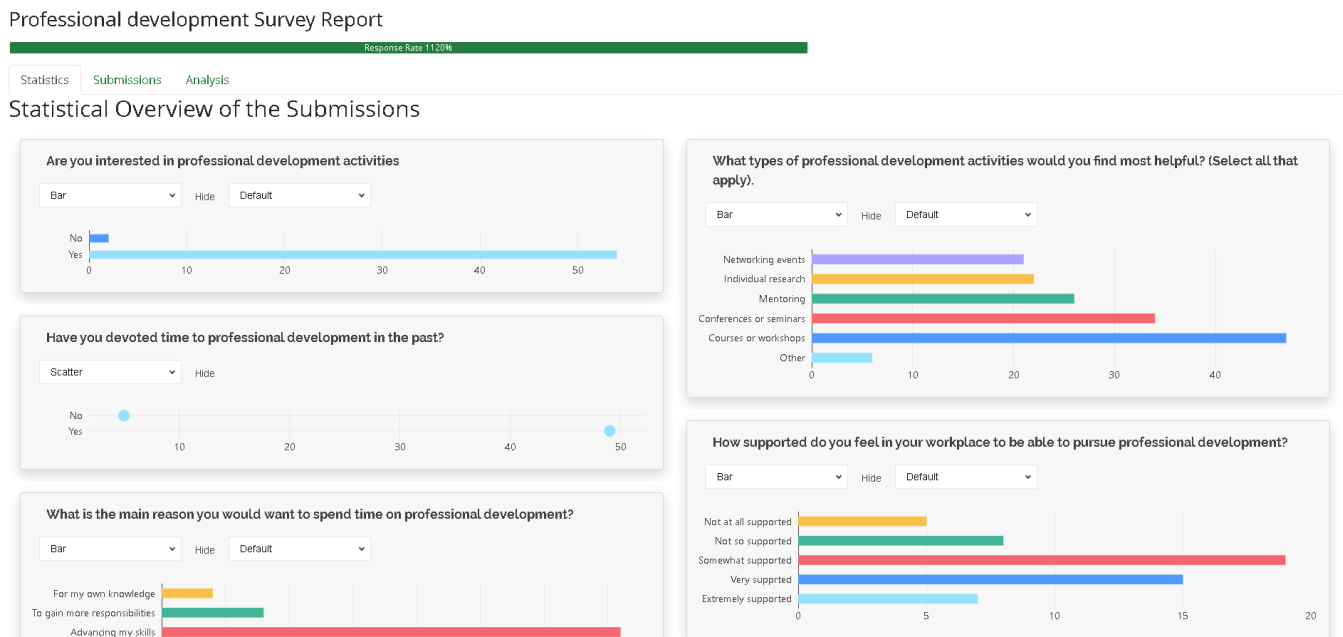


Figure 5:survey report example

3. Distribution Lists

If you have successfully logged in to your surveys system, then you are ready to create a survey. Before you create a survey, you need to create a Distribution list (contact list). This is the first step you will need to take as you start the survey building process. The Contacts tab contains all the options you need to create a distribution list. There are four options you can choose from to create the distribute list. The following sections contain details about each method to create the distribution list. (Figure 6)

Distribution Lists

List Name	Edit	Delete
All Contacts		
ICTC		
ICTC-2		
ics-103-52-term		
ICTC2		
ICS103-14-27-term192		
test		

Import Contacts from CSV

Create List From Existing Contacts

Create List From KFUPM Community

Create List Manually

Figure 6:Distribution Lists

Import contact list from CSV

Importing Contacts from a file (.csv) is the most common and the quickest to create a Distribution list (contact list) (Figure 7).

List Name:



You should upload a CSV (comma-separated values) file with exactly 4 columns in the following order:

- 1. email
- 2. first_ame
- 3. last_name
- 4. designation

The field "email" is mandatory.

Users will be matched with existing contacts through their email.

[Download Sample](#)

Chose a CSV file

[+ Create](#)

Figure 7: import contact list from CSV file

To import a distribution list:

1. Go to the contacts page or click on **the Manage Distribution Lists button**. Then click on the Import From contacts from CSV button.
2. Fill in the form providing a name for the list
3. Click Browse or Choose File and select the .csv file on your computer.
 - a) If your file isn't already saved as a .csv, you will need to save it as a .csv. To do this, go to File in the Excel toolbar and select Save As. Choose the file type as CSV (Comma Delimited).
- You should upload a CSV (comma-separated values) file with exactly 4 columns in the following order: (email, first_name, last_name, and designation). The field "email" is mandatory.
4. Click Create.

Create contact list from Existing contacts

You can create a new contact list from your existing contacts by selecting users contact from your account contacts list. (Figure 8)

List Name*

Choose form the list Contacts ?

mamro@test.kfupm.edu.sa
[redacted]@test.kfupm.edu.sa
e [redacted]2@test.kfupm.edu.sa
e [redacted]1@test.kfupm.edu.sa
g [redacted]1650@kfupm.edu.sa
b [redacted]s@kfupm.edu.sa
[redacted]y@kfupm.edu.sa
v. [redacted]aran@kfupm.edu.sa
[redacted]@kfupm.edu.sa
[redacted]i@kfupm.edu.sa
[redacted]sbit@kfupm.edu.sa
a [redacted]sa@kfupm.edu.sa

Figure 8: Create contact list from Existing contacts

To Create contact list from Existing contacts

1. Go to the contacts page or click on **the Manage Distribution Lists button**. Then click on the Create contact list from Existing contacts button.

2. Fill in the form providing a name for the list
3. Choose contacts form your list Contacts. Holding Ctrl key and click on the emails to add them to the list.
4. Click Create.

Create contact list from KFUPM Community

The system offers the option to create a contact list from list of students available in KFUPM Students Information System (Banner) based on your account level of access. A faculty can select students from his current and previous semesters taught courses. (Figure 9)

List Name*

Choose form the list Contacts ?

ICS-103-52-term 202010
ICS-103-03-term 202010
ICS-103-14-term 201920
ICS-103-27-term 201920
ICS-103-21-term 201820
ICS-103-20-term 201820
ICS-103-74-term 201710
ICS-103-77-term 201710
ICS-103-67-term 201620
ICS-103-66-term 201620
ICS-103-69-term 201610
ICS-103-59-term 201610
ICS-103-59-term 201520
ICS-103-69-term 201520
ICS-103-54-term 201510
ICS-103-64-term 201510
ICS-103-63-term 201420
ICS-103-53-term 201420
ICS-103-74-term 201410
ICS-103-66-term 201410
ICS-103-55-term 201320

Figure 9: Create List from KFUPM Community

To Create contact list from Existing KFUPM Community

1. Go to the contacts page or click on the Manage Distribution Lists button. Then click on the Create contact

list from Existing contacts button.

2. Fill in the form providing a name for the list
3. Choose courses form your list courses. All students on the selected courses will be added to the list.
4. Click Create.

Create contact list Manually

You can manually create a contact list and manually assign values to each contact fields. (Figure 10)

List Name:

Contacts

#	Email	First Name	Last Name	Designation	Demographic data
1	<input type="text" value="E-Mail."/>	<input type="text" value="First Name."/>	<input type="text" value="Last Name."/>	<input type="text" value="Designation"/>	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>

Figure 10: Create list Manually

To Create contact list Manually

1. Go to the contacts page or click on the Manage Distribution Lists button. Then click on the Create list Manually button.
2. Fill in the form providing a name for the list
3. Manually assign values to each contact fields (email , first_name, last_name, and designation). The "email" field is mandatory.
4. Click Create.

Edit or Delete Distribution List

The Distribution Lists page is where you get to see the details of your contacts Lists. (Figure 11) You can view, update and export your contacts list information.

Distribution Lists

List Name	Edit	Delete
All Contacts		
ICTC		
ICTC-2		
ics-103-52-term		
ICTC2		
ICS103-14-27-term192		
test		

Import Contacts from CSV

Create List From Existing Contacts

Create List From KFUPM Community

Create List Manually

Figure 11: Distribution Lists page

To update contact list information

1. Go to the contacts page or click on the Manage Distribution Lists button. Then click on the Edit button on the right side of the contact list name you plan to update
3. Manually update values to contact field (email , first_name, last_name, and designation).
4. Click update.

List Name:

Contacts

#	Email	First Name	Last Name	Designation	Demographic data	Delete
1	<input type="text" value="mamro@"/>	<input type="text" value="mamro@t"/>	<input type="text" value="mamro@t"/>	<input type="text" value="mamro"/>	<input type="text" value="null"/>	
2	<input type="text" value="events@t"/>	<input type="text" value="tariq"/>	<input type="text" value="ali"/>	<input type="text" value="Designation"/>	<input type="text" value="null"/>	
3	<input type="text" value="events-2@"/>	<input type="text" value="ali"/>	<input type="text" value="amro"/>	<input type="text" value="Designation"/>	<input type="text" value="null"/>	
4	<input type="text" value="events-1@"/>	<input type="text" value="mohamm"/>	<input type="text" value="amro"/>	<input type="text" value="Mr"/>	<input type="text" value="null"/>	

Update

Figure 12: update contact list information

Export Distribution List

To Export the contact list information

1. Go to the contacts page or click on the Manage Distribution Lists button. Then click on the contact list name you plan to export. (Figure 13)

2. Click export to PDF or CSV button.

ICTC

Search:



Email	First Name	Last Name	Designation	Edit Contact
events-1@test.kfupm.edu.sa	mohammad	amro	Mr	
events-2@test.kfupm.edu.sa	ali	amro		
events@test.kfupm.edu.sa	tariq	ali		
mamro@test.kfupm.edu.sa	mamro@test.kfupm.edu.sa	mamro@test.kfupm.edu.sa	Dr	

Showing 1 to 4 of 4 entries

Figure 13: Export Distribution List

Delete Distribution List

To delete a contact list:

1. Go to the contacts page or click on the Manage Distribution Lists button. Then click on the delete icon button on the right side of the contact list name you plan to delete. Note deleting a list does not remove the contacts from the system.

4. Managing Survey Folders

5. Managing Surveys

The main surveys page displays a list of all surveys and folders in the Home folder. All surveys are always in one of two states: Open, or Closed based on the survey Available On/ Until date.

Once a survey is ready to distribute, it is launched by clicking on the distribute button on the right of the survey name in the survey list page. (Figure 15)

Surveys



Figure 15:Survey distribute button

Survey Task icons

In Figure 15 you can see that there are a list of task buttons on the right-hand side of every survey listed. Use these buttons for access to specific feature of the survey tool. You will find below a list of these task icons(buttons) with a description

Task	Icons	Description
Edit		Jumps to the Edit Survey page of the specific survey selected
Report		Jumps to the View Results page of the specific survey selected
Move		Displays a dialog box to move survey to different survey folder.
Distribute		Jumps to the Distribute Survey page of the specific survey selected.
Consult		Enables you to give permissions to and share a survey with another user so they can view your survey. The survey tool will send an email with share URL of selected survey to selected user.
Preview		Enables you to open a survey in new browser window for testing out your survey. The survey will appear exactly the way survey takers will see it.
Clone		Enables you to copy a survey, and even send the copy to another user account. When a copy is made, it becomes a completely separate survey with its own survey link. Survey data is not copied along with the survey.

Create Survey

New surveys can either be created from scratch or by cloning an existing template or survey. When cloning a survey, the existing survey is copied in its entirety. All survey options, question, page conditions, etc. are copied to the new survey. If the survey being copied has responses, none of the responses are copied. After copying the survey, you can modify the name of the survey, and modify it options and content. (Figure 16)

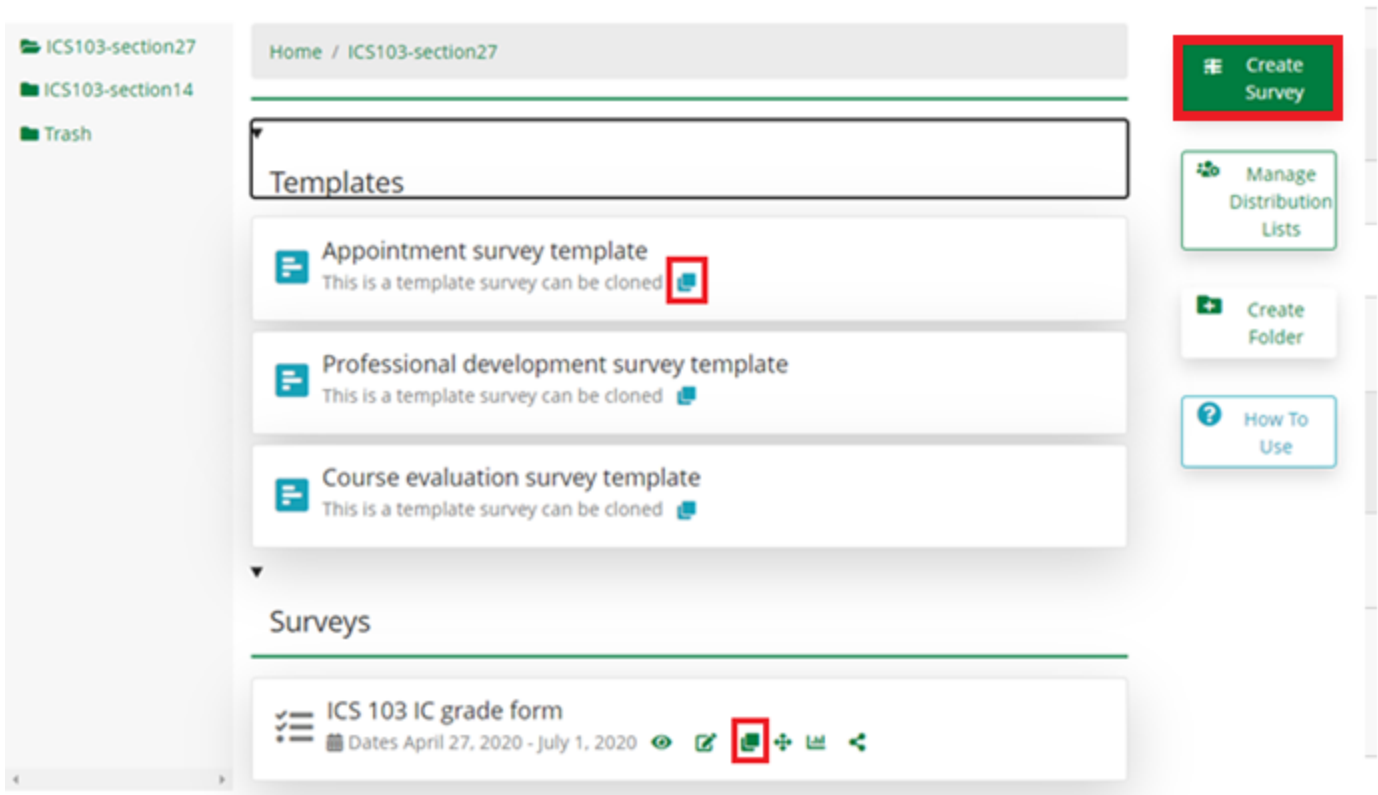



Figure 16: Main surveys page

Distribute the Survey

To distribute the survey, invite your contacts to fill the survey by sending each of them an email with the survey link. To do that, click on  near the survey name. If this button is not shown this means the survey is not active [Edit](#) it to change the dates. (Figure 17)

This opens the distribution form to fill the email subject and message. Note that the words preceded by \$ like **\$FirstName** will be replaced by the contact information. Please don't modify these words, you can move it anywhere to rephrase the default message but you should keep the same spelling as is. Please don't remove the word 'link' as it holds the survey link. If you like to modify the word 'link' to 'here' for example, double click on the word 'link' to popup a form to replace it by 'here'.

You can schedule up to two reminder messages to be sent to the recipients who didn't fill the survey. Click Reminder checkbox to schedule and set the reminder message. Click on Send Message button to send and schedule reminders.(Figure 18)

Invite Users To Fill

Subject:

Receivers:

Message:

Dear \$Designation \$FirstName \$LastName
 Please fill \$SurveyName survey on the following [link](#)

Reminder:

Figure 17:Distribution form

Reminder:

Remind on:

Remind subject:

Remind message:

Dear \$Designation \$FirstName \$LastName
 Please fill \$SurveyName survey on the following [link](#)

Second reminder:

Figure 18: Schedule and set the reminder message

Survey Reports

After collecting the survey answers, a report of submissions can be viewed by clicking on report button near the survey name. This opens the survey report page. The progress bar on the top of the page shows the percentage of responses collected to the invited contacts. Below that there are three tabs. The first tab contains visualization graphs for the survey answers for each question (Figure 19). The second tab contains a table of the answers with option to export to different formats (Figure 20). The third tab contains a tool to view the interactions between different questions.

Professional development Survey Report

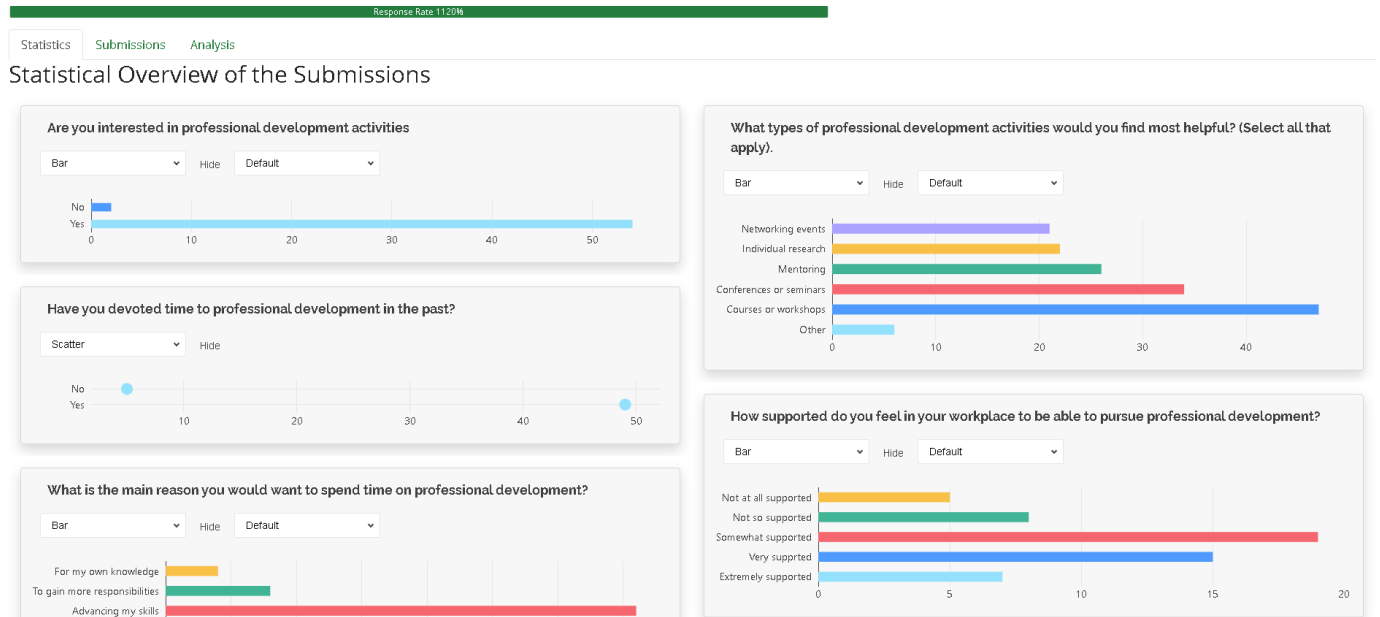


Figure 19: Survey report example

[Statistics](#)
[Submissions](#)
[Analysis](#)

show/hide column: All selected (23) ▾

Show 10 ▾ entries

Search:

itional development?

	pastDevelopment	question1	question2-Accessing library resources using the Web	question2-Browsing and searching
	Yes	Neutral	Extensive	Extensive
	Yes	Good	Fair	Substantial
	Yes	Excellent	Extensive	Extensive
	No	Fair	Fair	Extensive
	Yes	Good	Fair	Substantial
	Yes	Excellent	Fair	Substantial
	Yes	Good	Substantial	Extensive
	Yes	Excellent	A little	Fair
	Yes	Excellent	Substantial	Substantial
	Yes	Excellent	Extensive	Extensive

Showing 1 to 10 of 56 entries

Previous

 Next

Figure 20:Submission tab

Survey Options

The survey options page allows a survey creator to manage all of the administrative options associated with each survey. The options available are as follows: (Figure 21)

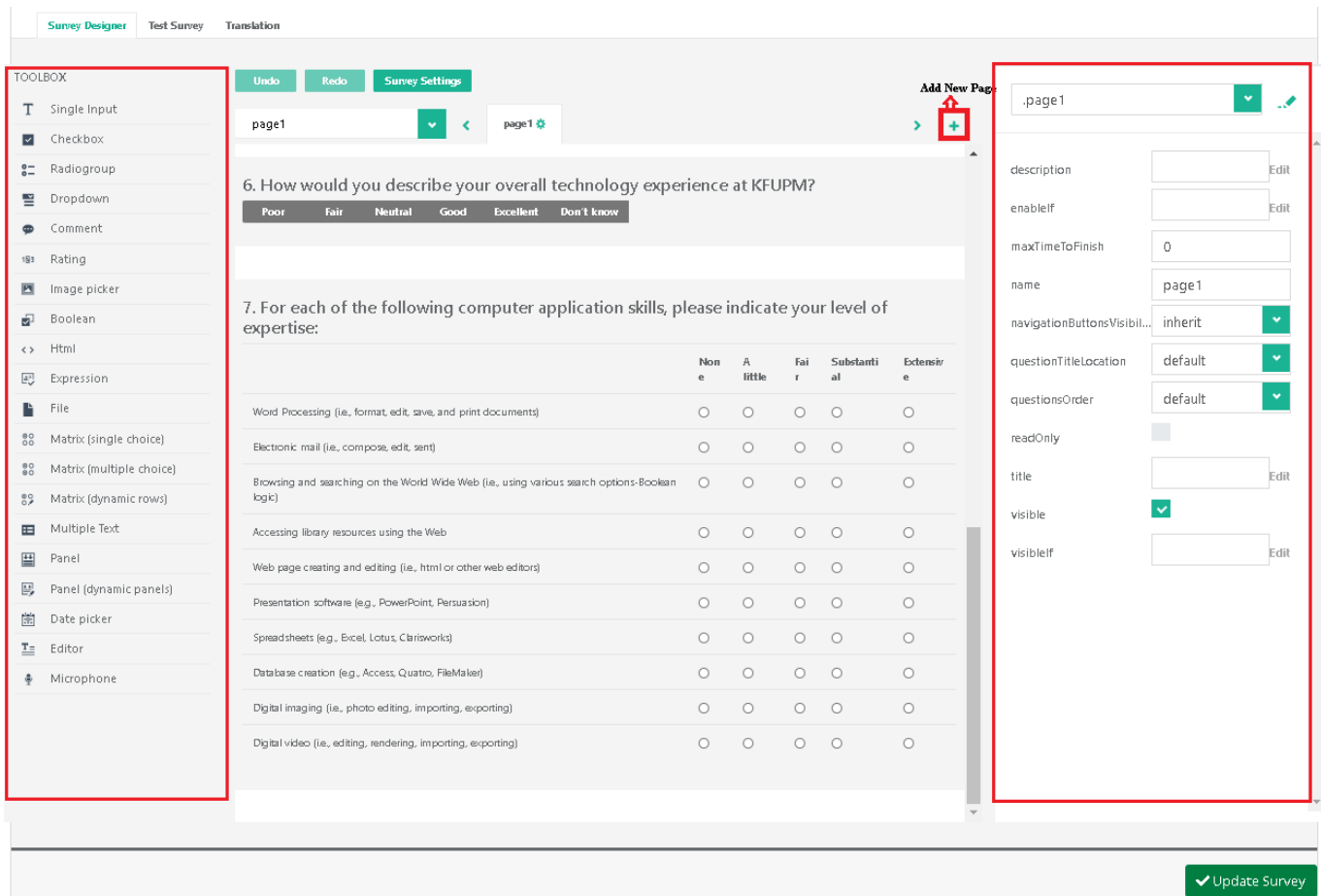






Figure 21:Survey Options

Survey Designer tab

By default, when you edit or create the survey you will be in the Survey Designer tab. While you are in this tab you are able to add questions from a toolbox on the left side of the survey, change all survey or question options and add new survey pages. Each survey can contain an unlimited number of questions distributed amongst any number of pages. A survey can contain multiple pages. New pages are inserted into a survey by clicking the "Add new page" button.

Question options

When adding a new question, or clicking on an existing one, the question options are shown to enable editing the question title and other settings. Figure 22 shows these options. Click on this icon  to drag the question and place it elsewhere on the page. Clicking on this icon  opens a dialogue to change different settings including the title, visibility, and others. Click on this icon  to duplicate the question. This icon  enables adding the question to the toolbox. This enables reusing the question on other surveys.

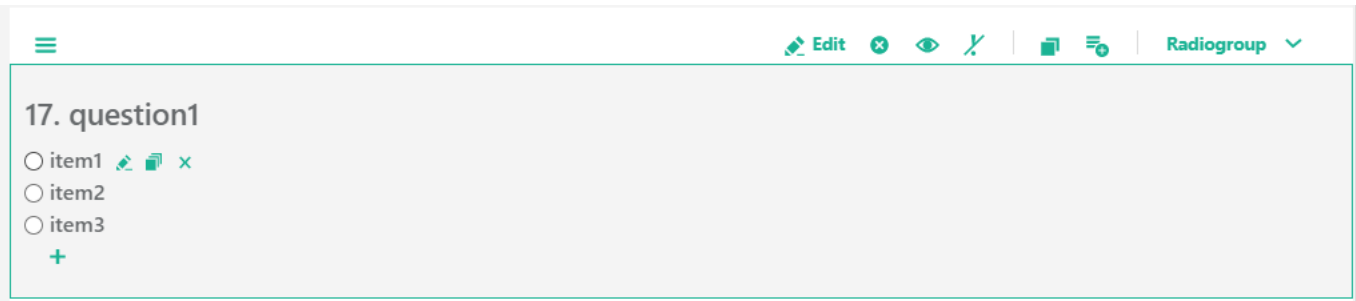


Figure 22 Question options

Test Survey tab

The “Test Survey” tab near the survey Designer will allow you to see and take the survey as if you were a respondent. You can also complete the Test Survey to generate test results. The Test Survey option will also alert you if there are any problems with the logic in your survey.

Translate tab

The Translate Survey tool is a powerful tool that provides a fast way for translating your survey. Within the translate tab you are given a translator-friendly side-by-side view for entering the translations (Figure 23). When the survey is taken by the respondent, the system automatically recognizes the default browser language of the respondent and presents the appropriate survey language. The respondent can also choose the language they would like to take the survey in by selecting it from a drop-down in the upper right-hand corner of the survey.

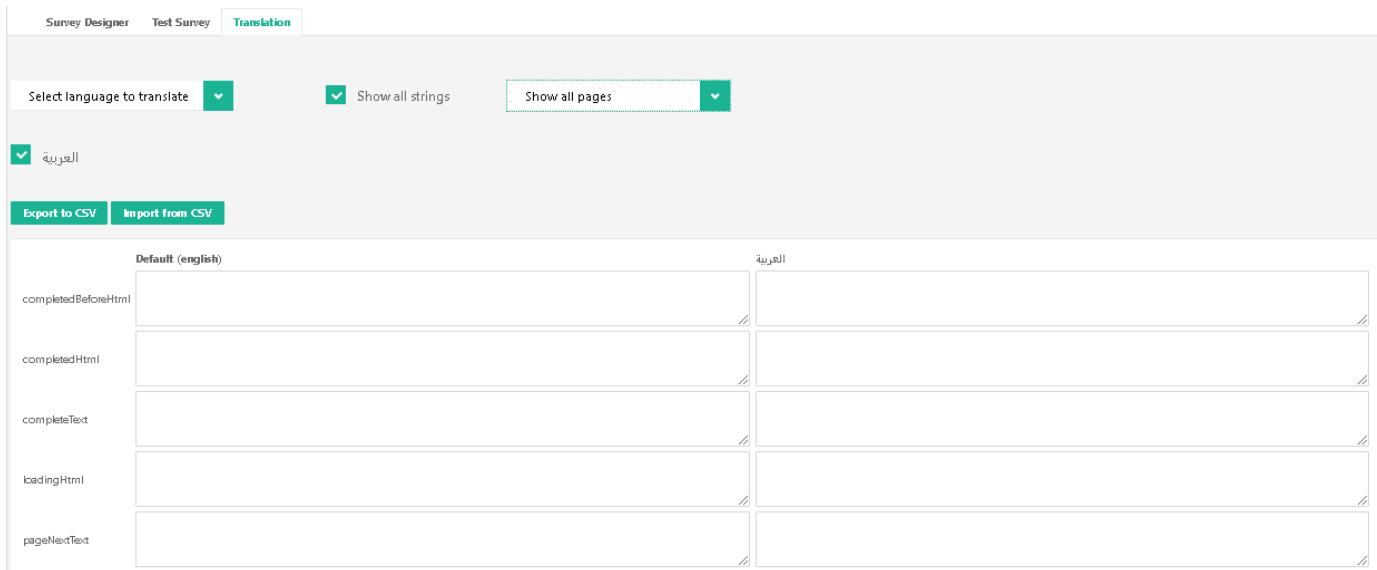


Figure 23:Survey translate tab

6. Institutional Surveys

The Office of Planning & Quality (OPQ) coordinates and administers a wide range of institutional surveys relevant to student development, University strategic planning, program assessment and review, and

benchmarking. These surveys provide a rich dataset of measures of student satisfaction and engagement. Additionally, OPQ consults and assists KFUPM departments and units in the design, launch, and analysis of their surveys as they relate to the University's mission. The OPQ staff will help you create a survey to meet your needs and adhere to the KFUPM survey policy and procedure. The OPQ also has access to a wide range of demographic and academic data about KFUPM Faculty, Staff, students, and alumni. In many cases, this data will be more accurate and require considerably less effort to gather than using a survey. Before planning a survey of students, faculty, or staff, please consult with the OPQ. Many individuals and groups both on and off of our campus wish to conduct surveys of the KFUPM community. The number of invitations to participate in online surveys is increasing dramatically.