

Qualtrics at UConn

Unleash the Power of Surveys

qualtrics@uconn.edu

What is Qualtrics?

- Qualtrics at UConn is a comprehensive system for creating and sharing surveys. The surveys can be sent to anyone, even users external to UConn such as Alumni or anyone who has an email. For surveys distributed by text, only a number is needed (at a cost with the purchase of SMS Credits, discussed in a later slide). There is no cost for users to use Qualtrics as is, and if needed additional addons can be purchased.
- Qualtrics at UConn is licensed and supported by Budget, Planning and Institutional Research (BPIR). The UConn Qualtrics Brand Administrator oversees the system, and all administrative support questions should be emailed to qualtrics@uconn.edu and not ITS. If you email ITS or submit a ticket, they will refer you to contact BPIR for help.

Who can use Qualtrics at UConn?

- Anyone with an active NetID and password, including NetIDwork and NetIDAdmin.
- This includes all students, faculty, and staff at all campuses Storrs and regional.
- Student employees can also login using their NetIDwork account, or regular NetID.
- UConn Health is also included, and sponsored affiliate NetID accounts as well.

How to access UConn Qualtrics?

- The easiest way to login is from the main login link on the BPIR Qualtrics webpage:
 - <https://bpir.uconn.edu/home/institutional-research/qualtrics/>



- For direct login to the UConn Qualtrics system, please use one of the following links:
 - <https://login.uconn.edu/cas/login?service=https://uconn.co1.qualtrics.com/ControlPanel/>
 - <http://uconn.qualtrics.com/>

Creating an Account

- The very first login is what creates the account.
- The login will be through Single Sign-On (SSO).
- This will require a UConn NetID and password.
- If already logged in through SSO, you will not need to login.
- If you plan on sharing surveys with a colleague at UConn, they will have to login to Qualtrics to create their account first. Only then will you be able to search them by their NetID to share a survey. The same applies when adding users to a group.

Creating an Account Continued

- When a Qualtrics account gets created, there is no UConn email attached to it. Here is an example of what it would look like:

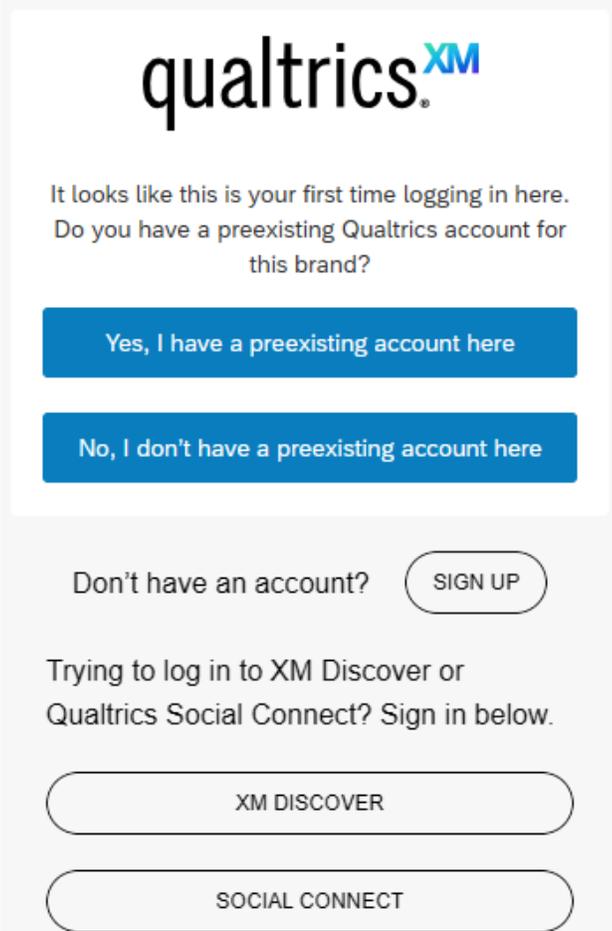
`vig11002admin#uconn` [View Account Use Info](#)

Username	<input type="text" value="vig11002admin#uconn"/>	Password	Send Password Reset Email
First Name	<input type="text" value="vig11002admin"/>	Division	<input type="text" value=""/>
Last Name	<input type="text" value="vig11002admin"/>	User Type	<input type="text" value="UConn_UserType"/>
Email Address	<input type="text" value=""/>	Account Status	<input type="text" value="Enabled"/> Set Expiration Date
		Add-On Tabs	Create Add-On Tab

- To use Qualtrics Basecamp video training, an email address does have to exist in the account. It can be requested to be added by the UConn Qualtrics Brand Admin, and I will go over how to login and use Qualtrics Basecamp training towards the end.

Creating an Account More Info

- For the very first Qualtrics login, when prompted please select that you do not have a preexisting account. This is not needed in most cases, since it's asking if you have another Qualtrics account specifically at UConn. You can have multiple Qualtrics accounts at UConn, for example NetID, NetIDwork, NetIDAdmin.
- This is in case you want to merge data from an existing account, which is not needed in most cases. You can also migrate surveys between accounts later.

A screenshot of the Qualtrics XM login interface. At the top is the Qualtrics XM logo. Below it, a message asks if the user has a preexisting account for this brand. There are two blue buttons: 'Yes, I have a preexisting account here' and 'No, I don't have a preexisting account here'. Below these is a 'SIGN UP' button. At the bottom, there are two buttons for 'XM DISCOVER' and 'SOCIAL CONNECT'.

qualtrics^{XM}

It looks like this is your first time logging in here.
Do you have a preexisting Qualtrics account for this brand?

Yes, I have a preexisting account here

No, I don't have a preexisting account here

Don't have an account? [SIGN UP](#)

Trying to log in to XM Discover or Qualtrics Social Connect? Sign in below.

[XM DISCOVER](#)

[SOCIAL CONNECT](#)

Sharing surveys with UConn users

- Sharing surveys with colleagues at UConn:
 - Make sure the user has logged in first to create their UConn Qualtrics account.
 - In the list of surveys, towards the right click on the 3 dots and select “Collaborate” to share. Enter the NetID of the user you want to share to.
 - Select the level of access, for example read only or edit for permissions.

Sharing surveys outside of UConn

- Sharing surveys with users external to UConn:
 - When sharing surveys to users outside of UConn, this is done through “Collaboration Codes”. You would go to “Collaborate” and enter their external email addresses, and they will receive an email with a Collaboration Code.
 - Because these users are external to UConn, the email they receive will contain Collaboration Codes that needs to be entered in Qualtrics.
 - The Collaboration Codes exist because not every Qualtrics account has an email address attached, and this ties the unique code to gaining access instead.

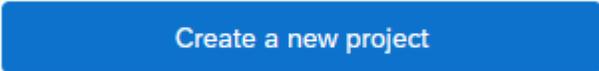
User Groups

- Groups are a useful way to share surveys to multiple users at once.
- To create a group, please email the UConn Qualtrics Brand Admin.
- A group is only beneficial when sharing to more than one user, otherwise sharing to a single person directly is much easier.
- When requesting a new group, please provide a list of NetIDs that will need access.
- Just like with sharing surveys, they will first need to login for me to add them to the group. Users can be added or removed anytime by emailing qualtrics@uconn.edu

Creating your very first survey

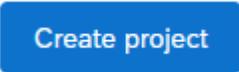
- First, if the survey will be collecting sensitive protected information, it is very important to determine if IRB approval is required. Regardless the questions of your survey, please review the IRB guidelines to determine if an IRB review is needed before:
 - https://bpir.media.uconn.edu/wp-content/uploads/sites/3452/2023/11/UC_Qualtrics_IRB_11.18.2023.pdf

- A new survey can be created by clicking on the following from the “Home” screen:



Create a new project

- Or a new project can be created by clicking the following from the “Projects” screen:



Create project

Survey Options

- Users can choose how long a survey will be available for. Once selected, this cannot change so please select the dates carefully.
- Alternatively, you can leave the survey with no end date and just pause the collection of responses. Then reopen it when needed.
- You can limit the amount of survey responses, for example if the survey is for a meeting or event with limited seating arrangements.
- You can enable the detection of bots and fraudulent responses.

Survey Options Continued

- You can require that a survey need a NetID login to complete, and this is a way to enforce that an actual UConn user did the survey. Here are the instructions on how to give a survey Single Sign-On (SSO) login:
 - <https://www.qualtrics.com/support/survey-platform/survey-module/survey-flow/advanced-elements/authenticator/sso-authenticator/#CAS>
- When you get to the part where you need to enter the host name and other information you will need to put in the UConn information below:
 - Hostname: **login.uconn.edu**
 - Port: **443**
 - URI: **cas**

Survey Options More Info

- From there you can save the authenticator, and users can authenticate into the survey using NetID SSO CAS logins.
- The authenticator element only works when the NetID is asked last (after answering all questions) instead of first.
- After someone submits the survey, then the NetID is requested, and once they login - it says Thanks for completing the survey (the default end message).
- One thing to keep in mind is when you take it in your browser that is not private, and your NetID has recently been logged in, it skips the verification step like it does when you login to any other NetID client.

Qualtrics Survey Incentives and Rewards (Gift Cards)

- The way to offer incentives such as gift cards to a random selection to survey participants is at the end of one Qualtrics survey to link to another survey to enter their email. This way the survey participants stay anonymous in the initial survey.
- Once all the results are collected in the second survey, use a random number generator either in Excel or Google to determine who will receive the gift cards.
- The method of linking one survey to another to then collect user email addresses should be sufficient for IRB purposes, and if in doubt you can always confirm with IRB.
- This is the method that BPIR uses when administering surveys with incentives.

Survey Themes

- Departments can choose to have a graphical department branded theme be loaded so that it can be used for surveys. Here is an example of a standard UConn theme:

The screenshot displays the 'Theme Settings' interface for a UConn survey theme. On the left, a sidebar contains navigation options: 'Theme Settings' (selected), 'General', 'Style', 'Logo', 'Background', and 'Icons'. A 'Delete' button is located at the bottom of the sidebar. The main content area is divided into two sections: settings and a survey preview.

Theme Settings:

- Theme Name:** University of Connecticut - Bl...
- Compatibility:** Both (dropdown menu)
- Limit theme customizations within surveys:** (toggle switch, currently off)

Survey Preview:

- Header: UCONN UNIVERSITY OF CONNECTICUT
- Progress: 0% Survey Completion
- Question: Overall, how satisfied are you with this product?
- Options: Extremely satisfied, Neither satisfied nor dissatisfied, Extremely dissatisfied
- Question: How would you rate our service in the following categories?
- Options: Excellent, Average, Terrible
- Category: Courtesy (Excellent: , Average: , Terrible:)

SMS Texting Credits

- Users have the option to distribute a survey by text message instead of email. This requires the purchase of SMS credits. There are 2 steps for this to be completed:
- **Step 1:**
 - You will first need to receive a quote from Qualtrics on the number of SMS credits you will need to purchase.
 - They are sold in buckets of 500,000 for \$500.
 - You will need to contact our Qualtrics Account Executive and Customer Success Representative **Danielle Hagey** to write up the quote: (dhagey@qualtrics.com)

SMS Credits Continued

- **Step 2:**
 - All SMS Credits for Qualtrics at UConn have to be purchased through UConn Procurement.
 - Procurement has a preference to put in a purchase requisition off the quote from Qualtrics to do a purchase order.
 - It is recommended that you work with your departments administrative assistant to purchase the credits once you have the quote.
 - Once the SMS Credits are purchased, please the UConn Qualtrics Brand Administrator to enable the SMS Distributions feature in your account.

Qualtrics Online Research Panels

- Qualtrics Panels allows researchers at UConn to purchase survey data collection for projects where a much bigger population needs to be surveyed than what is available at UConn. This is useful for large studies that need a pool of random users surveyed:
 - <https://www.qualtrics.com/research-services/online-sample/>
- Just like with SMS Credits, you will need to contact our Qualtrics Account Executive and Customer Success Representative **Danielle Hagey** to write up the quote:
(dhagey@qualtrics.com)

Help Resources

- Qualtrics at UConn is meant to be a self-service survey system. While we support the administrative aspects of Qualtrics, unfortunately we are unable to create surveys for users or departments. Creating surveys is very subjective depending on requirements.
- When designing surveys:
 - There are many comprehensive user guides that can help users
 - There is the Qualtrics Support AI Assistant, which can help answer many nuanced questions
- When transferring surveys to other users upon leaving UConn or graduating, or need to create a group or add/remove users:
 - Please email the UConn Qualtrics Brand Administrator at qualtrics@uconn.edu

Help Resources Continued

- Qualtrics Basecamp video training:
 - A huge repository of instructional videos and classes users can take. Anyone at UConn has access to this resource, which is great for new users who want to learn Qualtrics at their own pace.

What happens after leaving or graduating?

- UConn Qualtrics accounts are never deleted or purged, and there is no automated mechanism for doing so.
- Please request your surveys to be transferred to a supervisor or colleague by emailing the UConn Qualtrics Brand Admin at qualtrics@uconn.edu
- You may also transfer your surveys to another institution as well. This can be done manually or through a Qualtrics Support ticket.

Qualtrics Questions?

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