



RowanUniversity

INFORMATION RESOURCES & TECHNOLOGY

# Qualtrics

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<http://www.rowan.edu/irt-training>

October 2024

# Learning Objectives

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The goal of this Qualtrics class is to increase the learner's skills in using the basic features of Qualtrics.

Upon successful completion of this class, the learner will be able to:

1. Navigate the Qualtrics platform.
2. Create various Qualtrics survey questions such as multiple choice and rank order.
3. Create survey questions using skip and display logic.
4. Distribute surveys using a contact list.
5. Analyze data created by surveys in Qualtrics.
6. View reports in Qualtrics.
7. Understand where to find additional training and support from Qualtrics.

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## Log on to Qualtrics

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Qualtrics is the official Rowan University survey tool. You will be able to use Qualtrics to create, edit and distribute surveys, as well as analyze the collected data.

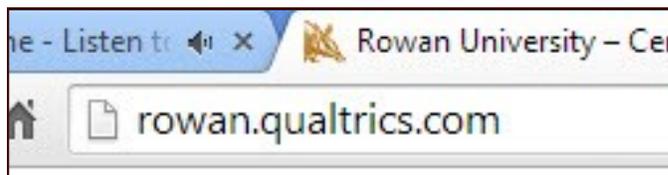
The faculty and staff license allows unlimited surveys and the student license allows two active surveys with a total of 1,500 responses.

Qualtrics is supported by modern web browsers. It's recommended that you use the latest versions.

To create a Qualtrics account (or log on to an existing account), navigate to <https://rowan.qualtrics.com> in a web browser. (Do not sign up for a free account at Qualtrics.com.)

- Log in with your Rowan Network username and password.
- You will be prompted to select from two options:
- If you do not have an account, select **I don't have a Qualtrics account**
- If you previously created an account, select **I already have a Qualtrics account**
- To set up a new account, you will be prompted to enter your Rowan email, first and last name and student status and graduation date.
- Read and accept the Terms of Service statement from Qualtrics.

You will then be logged in to Qualtrics to begin building your survey.

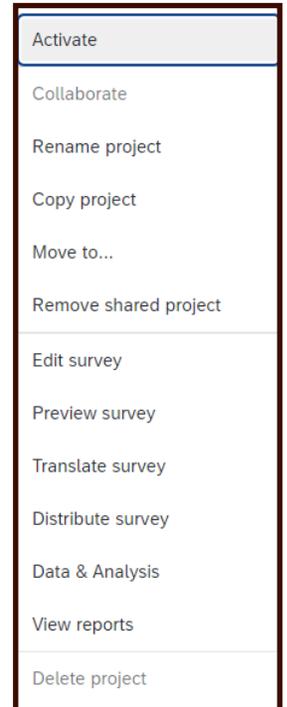


# My Surveys

The **Projects** page gives a list of all surveys you created, or are collaborating on, and links to the other functions in Qualtrics. It gives you a quick look at all your projects, statuses, responses and a 12 day trend. The drop down on the right of each project gives you more options such as those listed below. You can also create

folders on the left side of the page and easily organize your surveys in folders and sub folders.

1. **Activate**
2. **Edit Survey**
3. **Preview Survey**
4. **Translate Survey**
5. **Distribute Survey**
6. **Data & Analysis**
7. **View Reports**
8. **Reveal in Folder**
9. **Rename Project**
10. **Copy Project**
11. **Share Project**



Project name	Status	Responses	Type	Owner	Last modified	Creation date
Yearly Review 2017 - 2018 IRT Training	Closed	222	Survey		Feb 2, 2023	Apr 16, 2018
Test Pre-survey Banner 9	Closed	0	Survey	Me	Jan 18, 2024	Sep 20, 2019
Rowan Survey Calendar Form	Closed	16	Survey	Me	Sep 16, 2024	Jun 4, 2019
QSupport_IntroEco Perceptions PreSurvey - Copy	New	—	Survey	Me	Jan 19, 2023	Jan 17, 2023
QSupport	New	—	Survey	Me	Nov 29, 2023	Nov 29, 2023
Pre-survey Banner 9 Advisor Training	Active	15	Survey	Me	Sep 20, 2019	Aug 1, 2019
Post Training Course Survey	Active	8	Survey		Nov 6, 2023	Jul 31, 2023
New folder	—	—	Folder	—	—	—
Mental Health Awareness Training: Class Registration - Copy	New	—	Survey	Me	Sep 4, 2024	Aug 20, 2024
July 2022 Day Travel	Active	4	Survey	Me	Sep 12, 2024	Mar 2, 2023
IRT - Test survey	New	—	Survey	Me	Dec 6, 2021	Dec 3, 2021
IRT - Test	Active	0	Survey	Me	Dec 9, 2021	Dec 9, 2021
IntroEco Perceptions PreSurvey Spring 2023	Active	106	Survey		May 25, 2023	Jan 8, 2023
FY25 IRT Training and Instructional Support Class Evaluation	Active	22	Survey	Me	Sep 24, 2024	Jun 27, 2024

# Create Survey

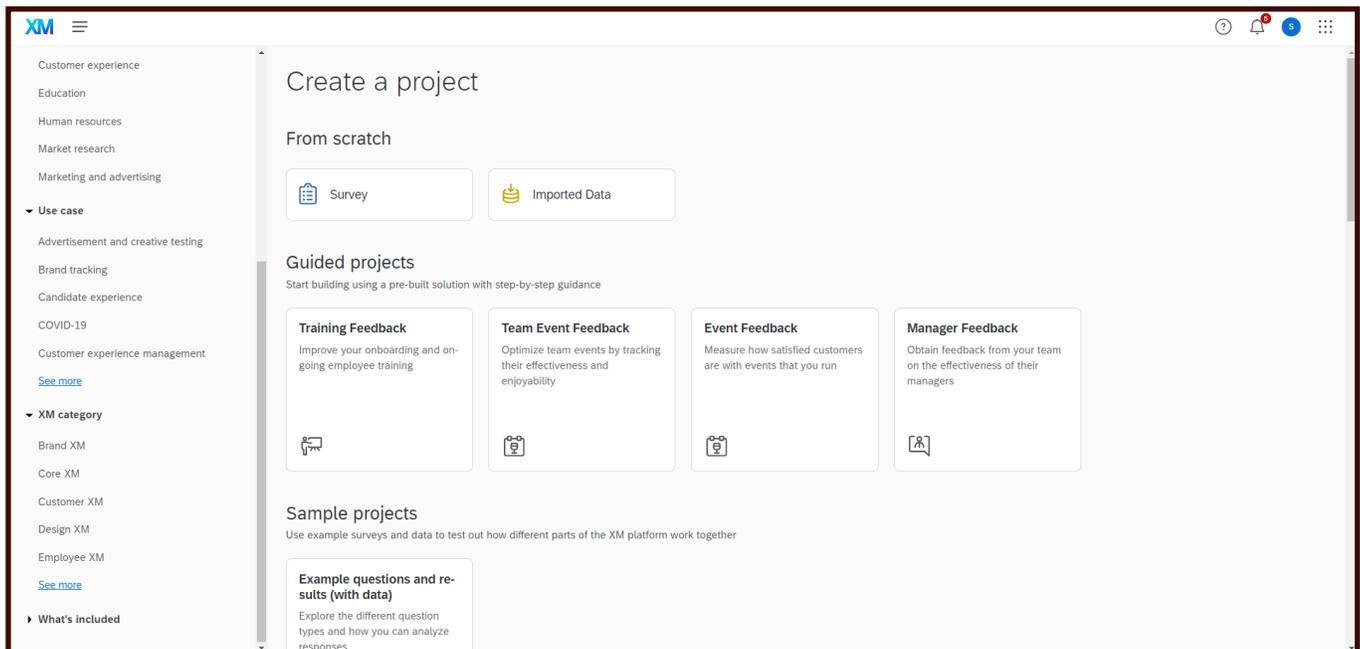
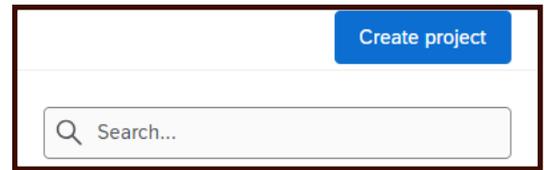
Select the **Create Project** button.

You will have four choices in building a survey:

**New Project/Import Data** - build your survey from scratch.

**Guided projects** - start building using a pre-built solution with step-by-step guidance.

**Sample projects** - use example surveys and data to test out how different parts of the XM platform work together.



Enter a **Project Name**

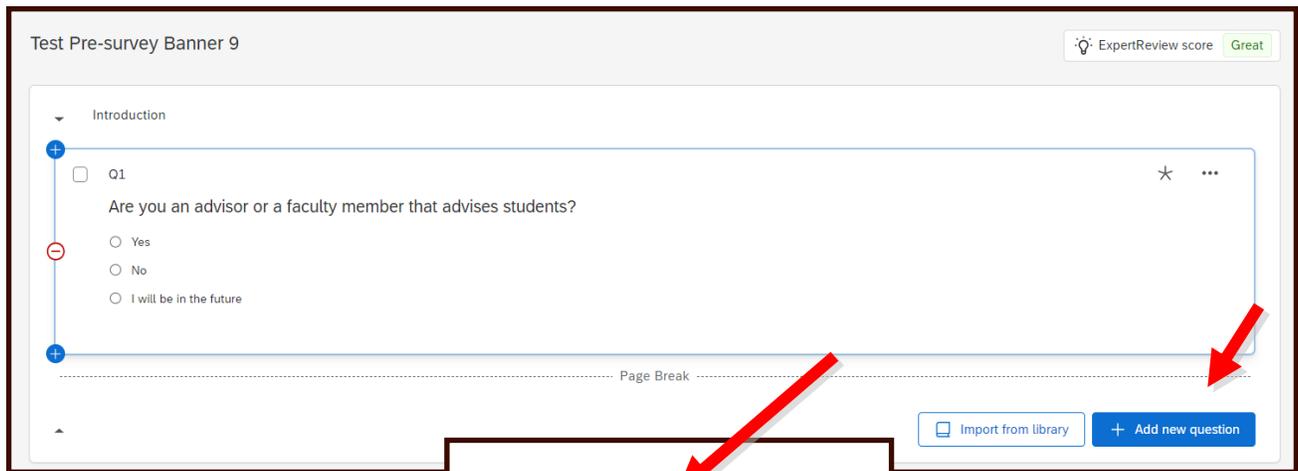
Select a **Folder** (optional)

Select **Create Project**

# Edit Survey - Format Questions

After creating your survey you will then be put into the **Edit Survey** tab, where you will create all of the questions and other elements of your survey.

**Select + Add new question** and the dropdown menu shows many types of questions you can create such as Multiple Choice, Matrix and Text Entry.

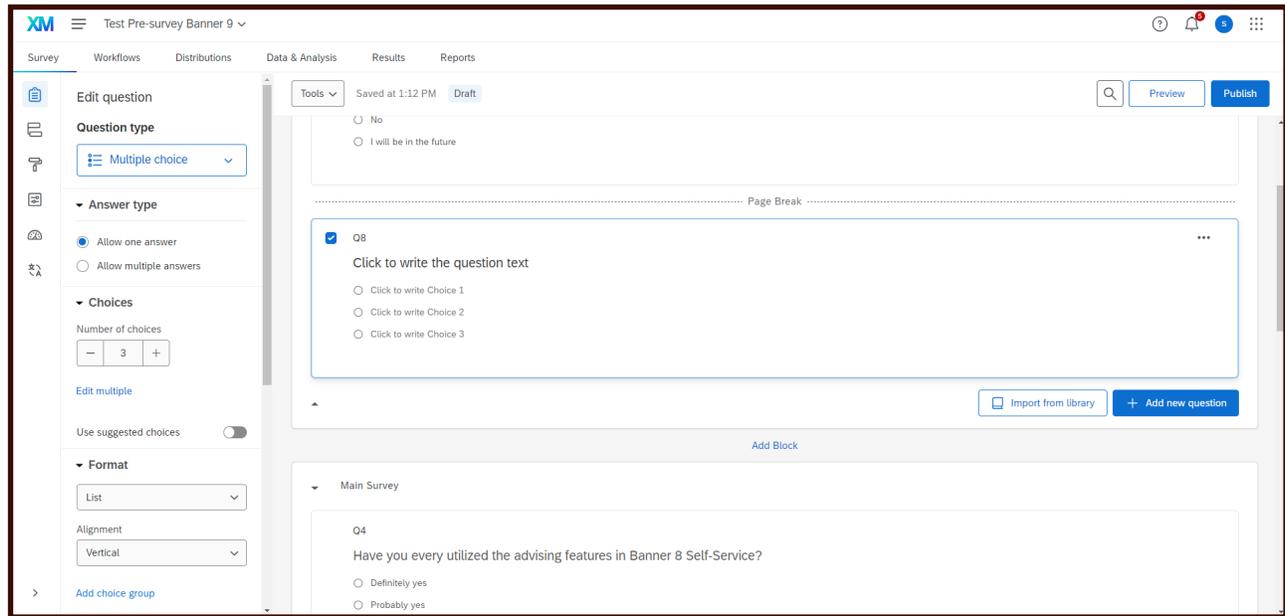


- Multiple choice
- Text entry
- Text / Graphic
- Matrix table**
- Slider
- Form field
- Rank order
- Side by side

Select **Multiple Choice**

# Edit Survey - Format Questions

Within **Multiple Choice** questions, you will see many options on the left panel such as the number of answers, if multiple answers are permitted and if you want to force a response.

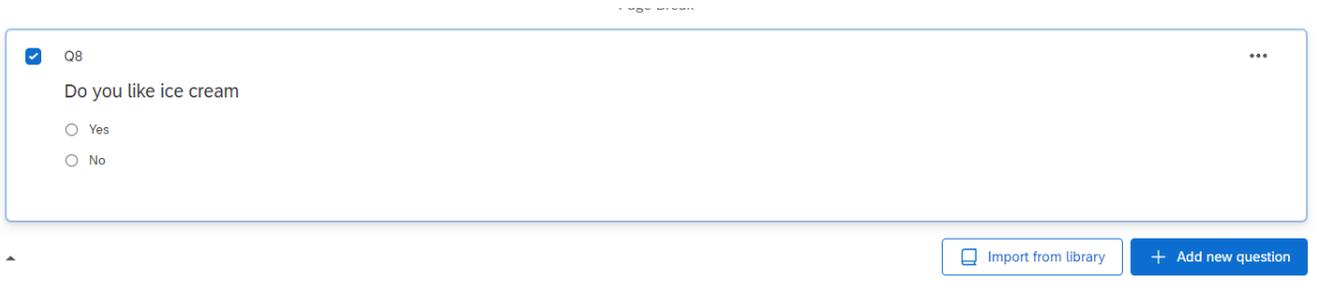


Select **Click to write the question text**

Type *Do you like ice cream?*

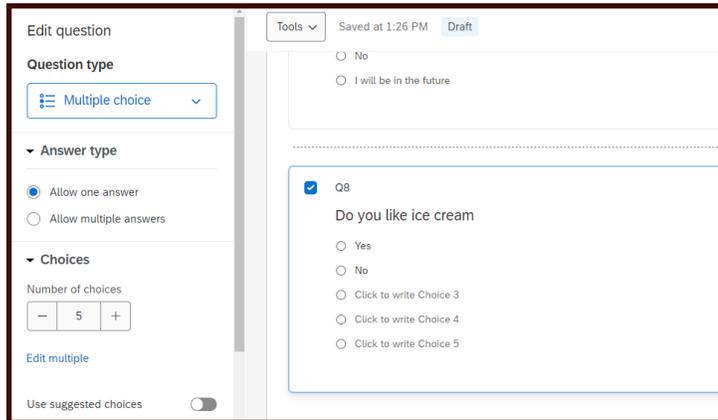
**Tab**

Qualtrics provides possible answers to the question.



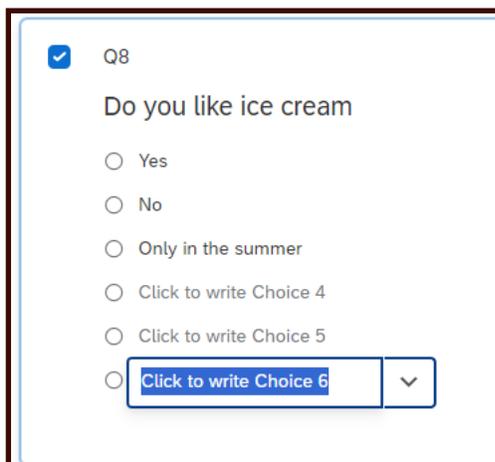
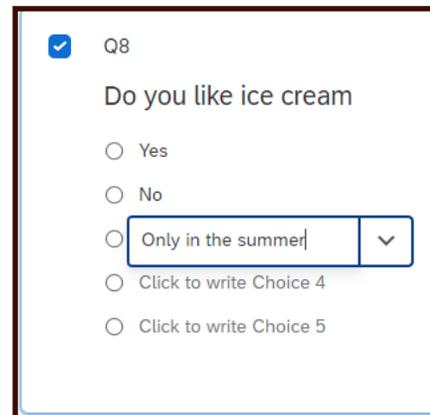
# Edit Survey - Format Questions

From the left panel, increase the number of choices.



You can change an answer by selecting it and typing over it.

Select **Choice 3** and type **Only in the summer**.

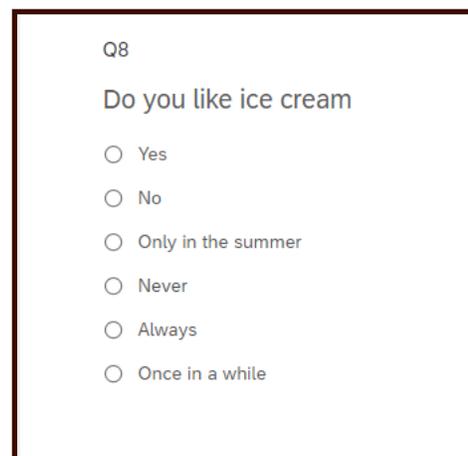


You can add more choices by:

Selecting the last answer

Selecting **Enter**

Change all of the answer choices

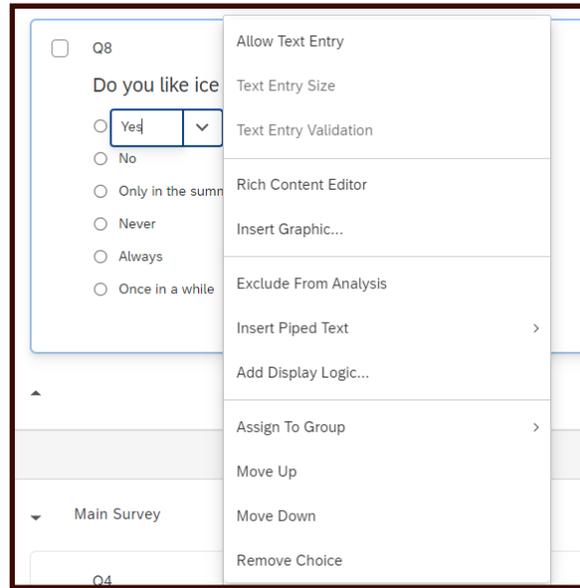


## Edit Survey - Format Questions

The drop down menu next to each question allows other options such as **Allow Text Entry**, **Insert Graphic** and **Exclude From Analysis**.



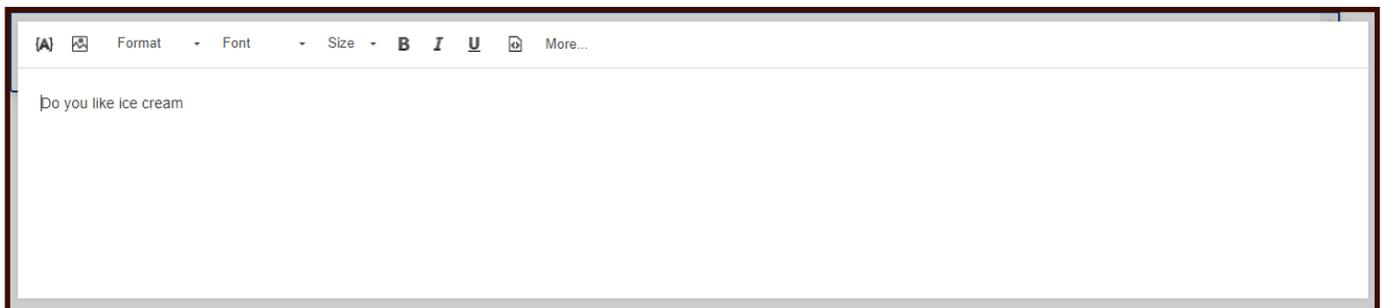
A screenshot of a survey question in edit mode. The question is labeled "Q8" and "Do you like ice cream". Below the question are seven radio button options: "Yes", "No", "Only in the summer", "Never", "Always", and "Once in a while".



Format the question by selecting it, and then selecting the blue **Rich Content Editor** tab above it.



The **Rich Content Editor** menu gives you many choices such as adding an image, a video, change the font, etc. Click outside the box to save it.



# Edit Survey - Insert and Format Questions

## Practice

Add the following questions to the survey:

### Add Question 2 - Multiple Choice (one answer only)

Which kind of cone do you prefer the most?

Sugar cone

Waffle cone

Wafer (cake) cone

Cookie cone

What kind of cones do you like?

- Sugar cone
- Waffle Cone
- Wafer (cake) cone
- Cookie Cone

### Add Question 3 - Multiple Choice (allow multiple answers)

What kind of ice cream do you like?

Chocolate

Vanilla

Strawberry

Mint Chip

Coffee

Other (add text entry)

What kind of ice cream do you like (chose as many as you wish)

- Chocolate
- Vanilla
- Strawberry
- Mint Chip
- Coffee
- Other

### Add Question 4 - Rank order

Rank the following ice cream vendors:

Friendly's

Dairy Queen

Bruster's

Mr. Softee

Rita's

Rank the following ice cream vendors

Friendly's	1
Dairy Queen	2
Mr. Softee	3
Rita's	4

### Add Question 5 - Multiple Choice (allow multiple answers)

Why don't you like ice cream?

It's too cold

It's too creamy

It's too many calories

It's too sweet

Other (add text box)

Why don't you like ice cream (choose as many as are applicable) ?

- It's too cold
- It's too creamy
- Too many calories
- Too sweet
- Other

### Add Question 6 - Text Entry Multi Line

What other desserts do you like?

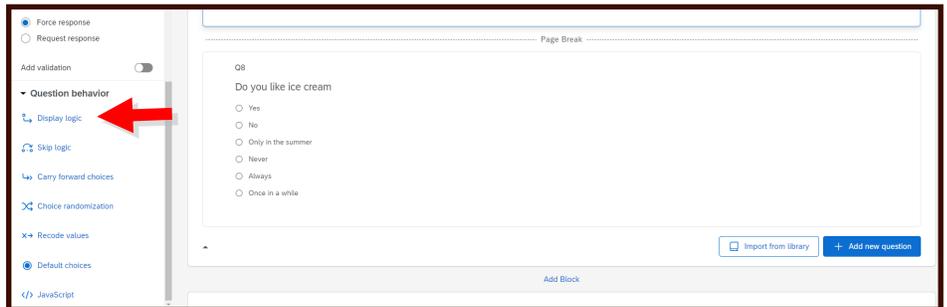
What other desserts do you like?

# Edit Survey - Display Logic

**Display Logic** – If certain conditions are met, then the question will be displayed.

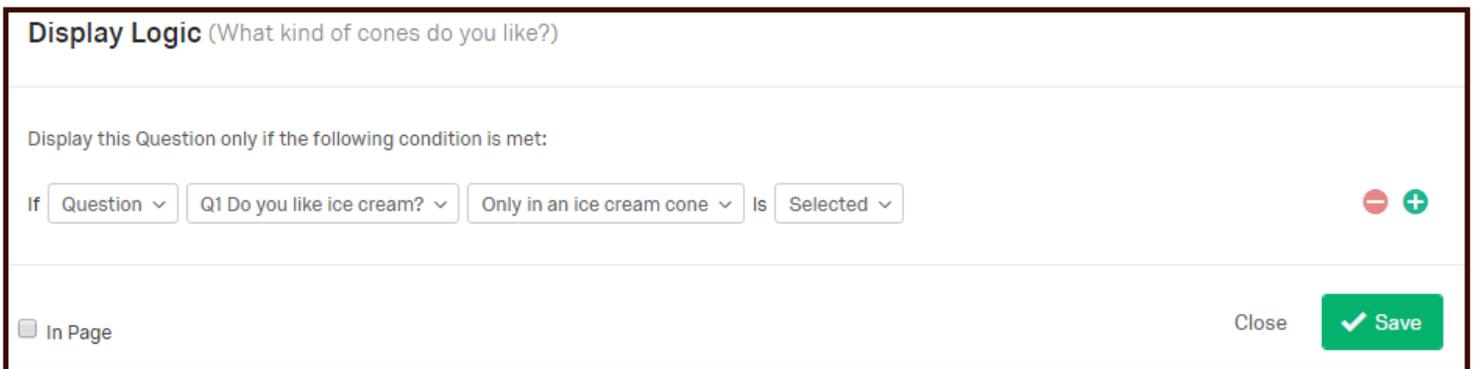
Select Question 2

Select **Add Display Logic**

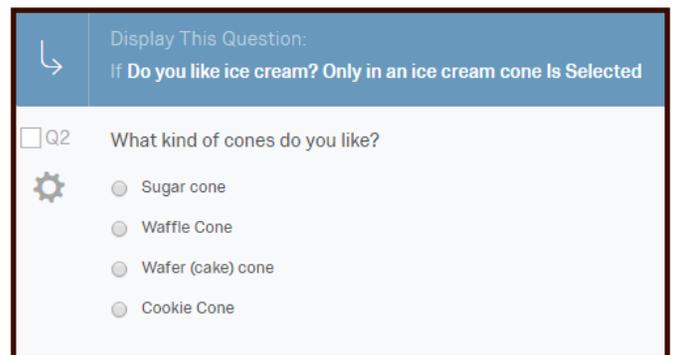


In the **Display Logic** menu, select the question (Question 1) answer (Only in an ice cream cone) and if it is selected or not selected (selected).

Select **Save**.



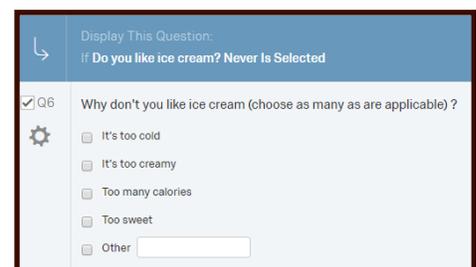
The question will then have the display logic visible above it.



**Practice -**

Select Question 5 - Why don't you like ice cream?

Display it only if in Question 1 - Never - is selected.



## Edit Survey - Skip Logic

**Skip Logic** – skips to another question if a certain answer is chosen.

Select Question 1 - Do you like ice cream?

Select **Add Skip Logic** from the left panel.

### ▼ Question behavior

↳ Display logic

↳ Skip logic

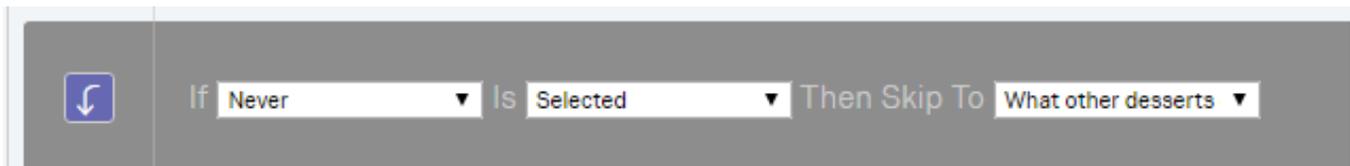
↳ Carry forward choices

↔ Choice randomization

x→ Recode values

⦿ Default choices

</> JavaScript



The screenshot shows a configuration bar for the Skip Logic wizard. It features a blue square icon with a white arrow pointing down and to the left. The text reads: "If **Never** Is **Selected** Then Skip To **What other desserts**". Each of the words "Never", "Selected", and "What other desserts" is contained within a white dropdown menu box with a small downward-pointing triangle on its right side.

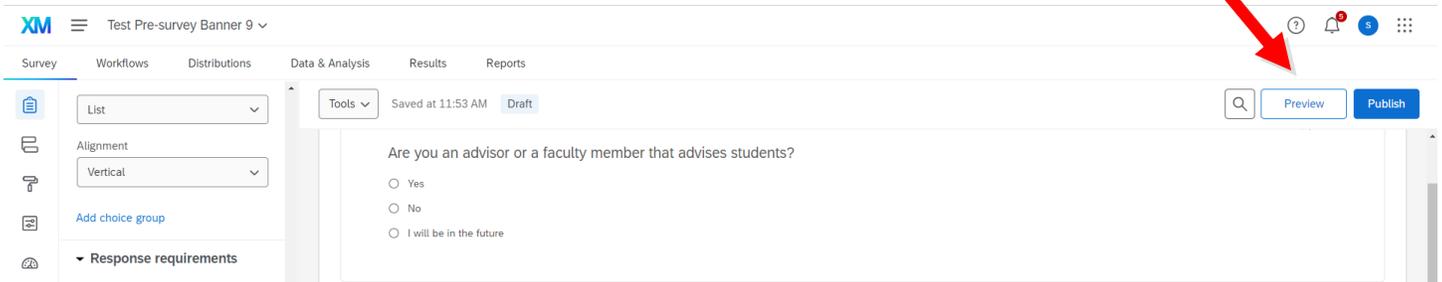
Complete the information in the Skip Logic wizard.

Select If **Never** is **Selected** then skip to **What other desserts do you like?**

Select **Done**.

## Edit Survey - Preview

To preview the survey, and test your logic, click on the button **Preview Survey** at the top of the page.



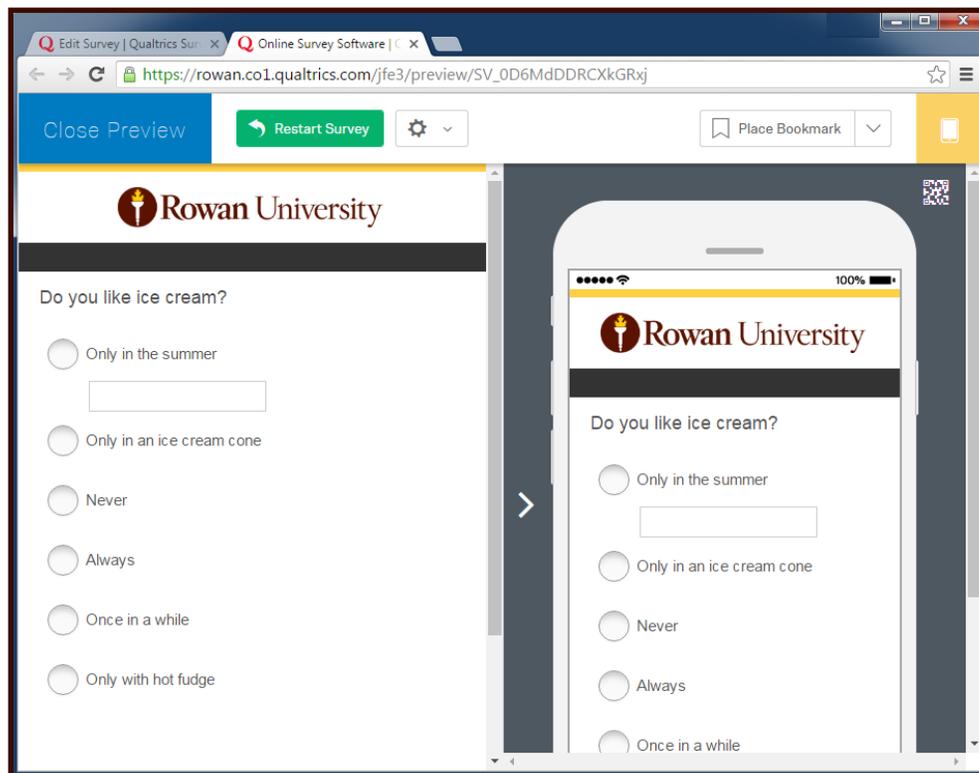
The preview shows both how it will look in a browser and on a mobile device.

Select the answers to the questions.

To preview it again, select **Restart Survey**. (green button at the top).

See how the survey reacts when you choose the Never response vs all the other responses.

Select **Close Preview** when you are finished previewing it.

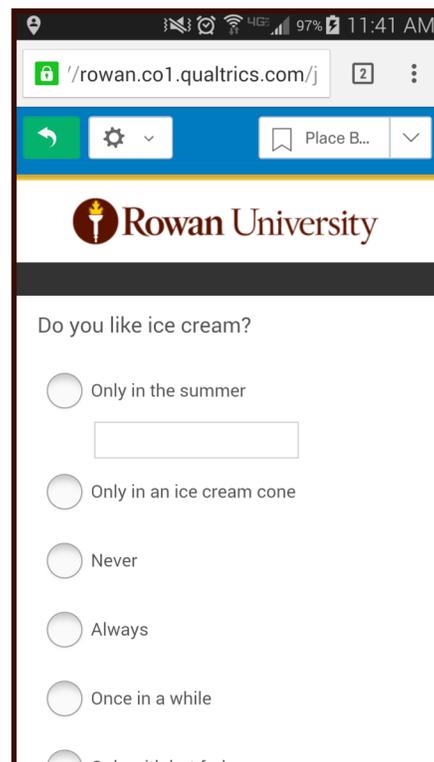
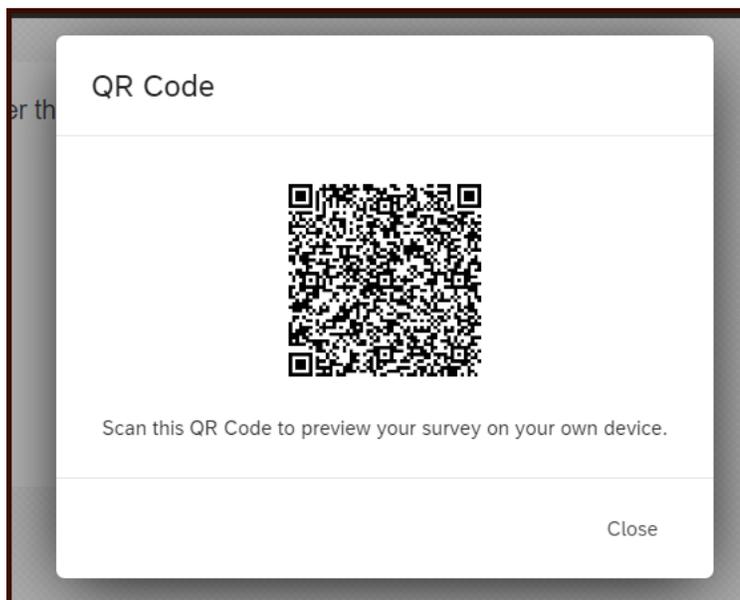
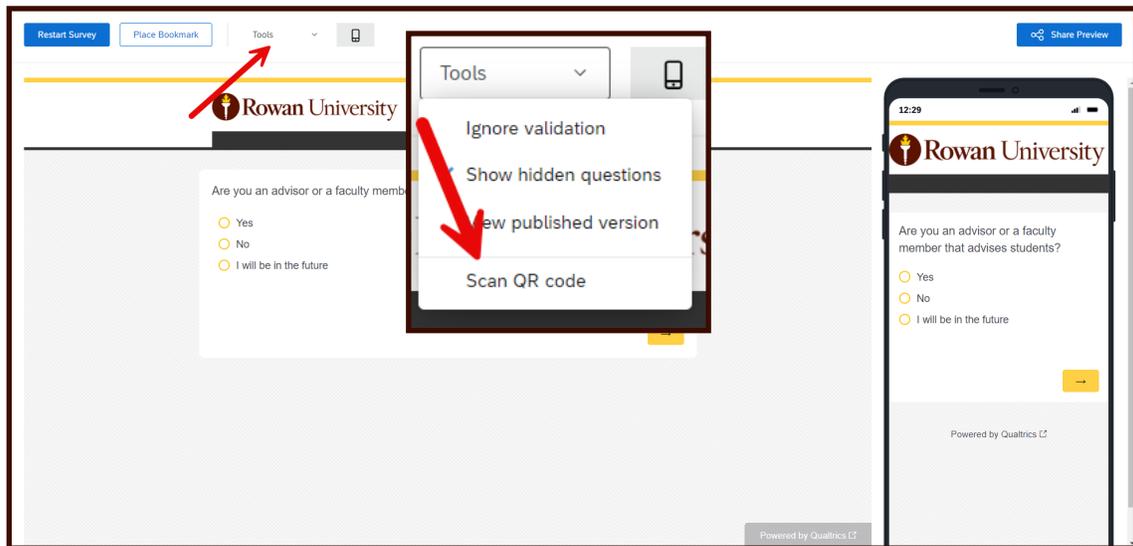


## Edit Survey - Preview

To preview the survey on a mobile device, the tools dropdown. Select **Scan QR code**. A window will open on the web page with a QR Code for your survey. Scan the barcode with an app on your phone or tablet such as QR Reader.

<https://play.google.com/store/apps/details?id=com.google.zxing.client.android>

<https://itunes.apple.com/us/app/i-nigma-qr-code-data-matrix/id388923203>

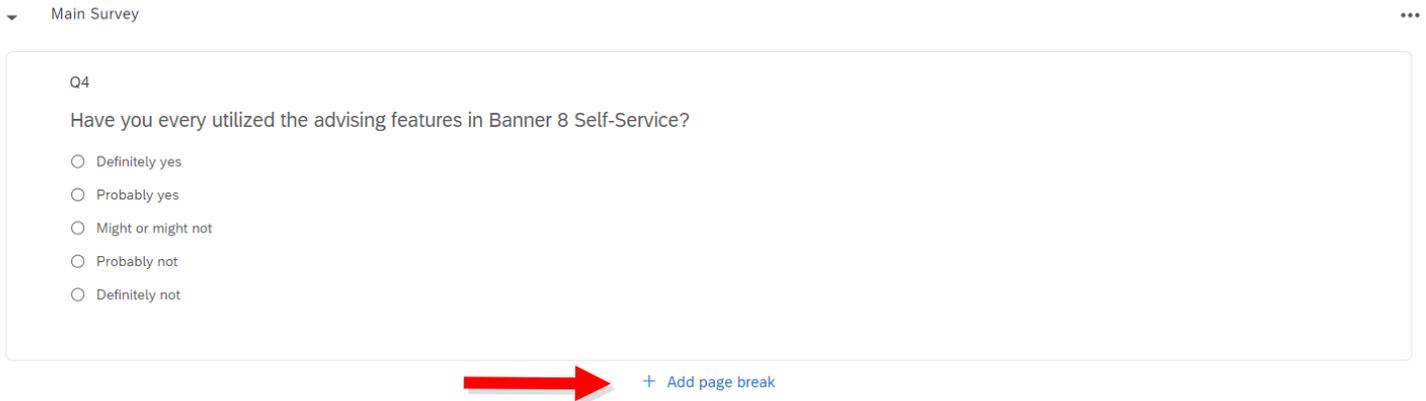


# Edit Survey - Other Options

To add a Page break:

Select the question before the page break

Select **Add Page Break** from the bottom or top of the question



Main Survey

Q4

Have you every utilized the advising features in Banner 8 Self-Service?

- Definitely yes
- Probably yes
- Might or might not
- Probably not
- Definitely not

[+ Add page break](#)

Left of the page **Survey menu**

**Look & Feel** (fonts, colors) - Rowan faculty/staff theme or student theme

**Survey Options** (end of survey message etc.)

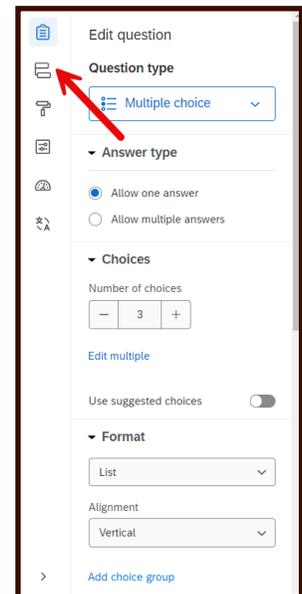
**Quotas** create quotas to make sure you gather the exact amount of data required for your study.

**Translations** add a language you want translated in your survey.

**Survey Flow** (Blocks of questions - see advanced options)

**Tools** - Auto number the survey,

**Triggers** (send survey results to an email address), spell check etc.



Edit question

Question type  
Multiple choice

Answer type  
 Allow one answer  
 Allow multiple answers

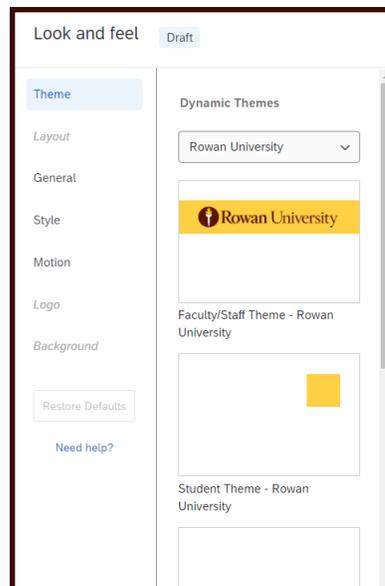
Choices  
Number of choices  
- 3 +  
Edit multiple

Use suggested choices

Format  
List

Alignment  
Vertical

Add choice group



Look and feel Draft

Theme

Layout

General

Style

Motion

Logo

Background

Restore Defaults

Need help?

Dynamic Themes

Rowan University

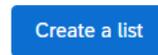
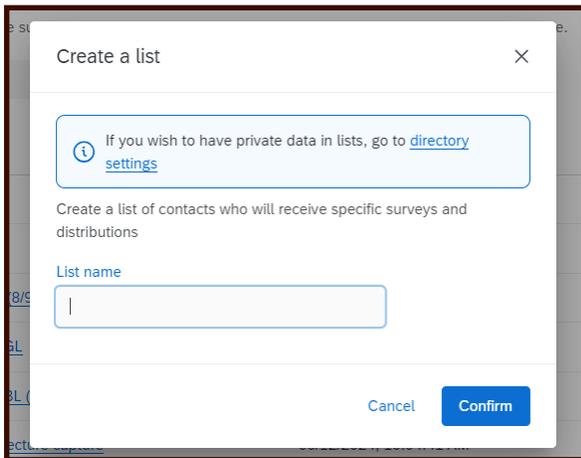
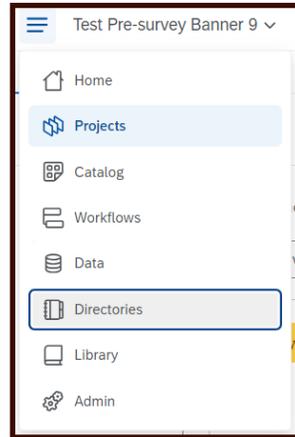
Rowan University

Faculty/Staff Theme - Rowan University

Student Theme - Rowan University

# Create Contacts

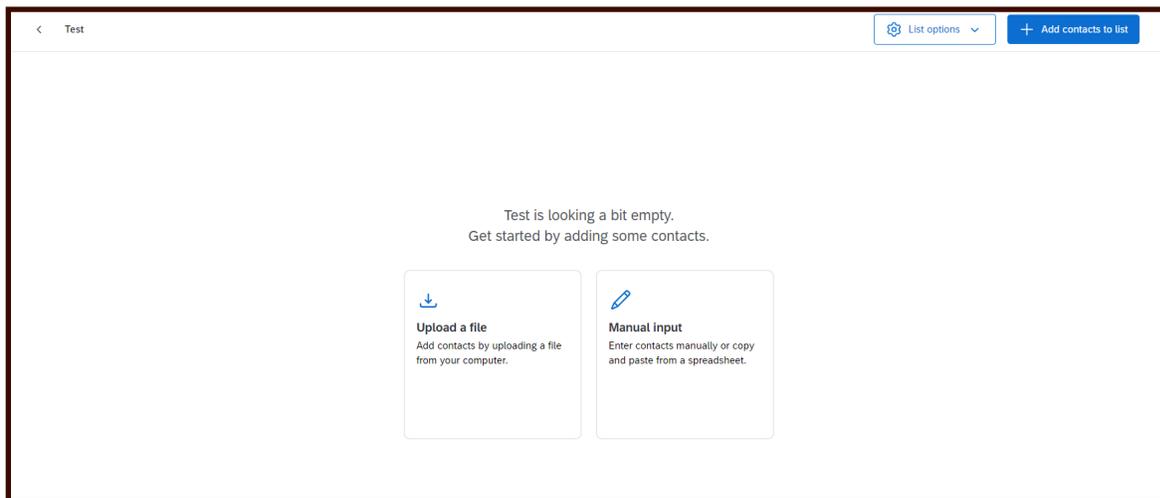
Select the **Directories** tab from the drop down home menu to create a mailing list.



Select the **Segments & Lists** tab. Select Lists from the left menu. Select **Create a List**, enter a **List Name**, and click on **Confirm**.

**Upload a File** - You can import a list from a comma or tab delimited text file.

**Add Manually** - You can manually type in your contacts.

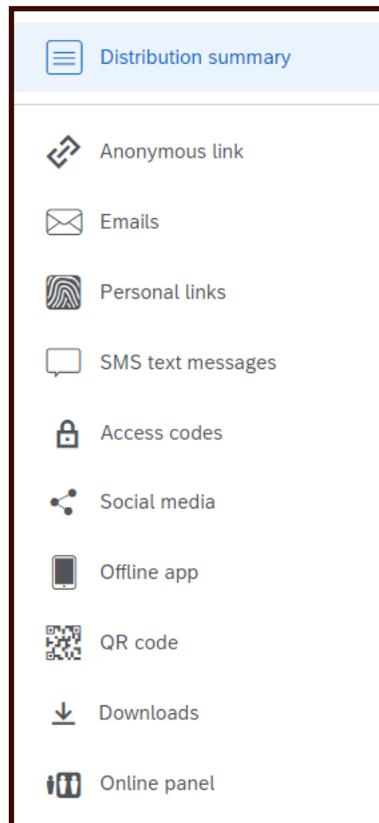


## Practice:

Import the contact list from the .csv file that was emailed to you.

# Distribute Survey

Select the **Distributions** tab.



You can distribute your survey using any of the following methods:

- Email with a unique link sent through Qualtrics. This allows you to track respondents.
- A single reusable link, sent either through Qualtrics email or your own email. You can also post a single reusable link on a web site or social media. This allows you to reach a wider audience, but you cannot track individual respondents.

Rowan University does not currently license the Offline App.

Select **Send with Qualtrics - Compose Email**.

# Distribute Survey by Email

Click on the button **Emails tab** and then select the **+ Compose Email button** to send an email to people in your contact list. Each email will contain a unique link.

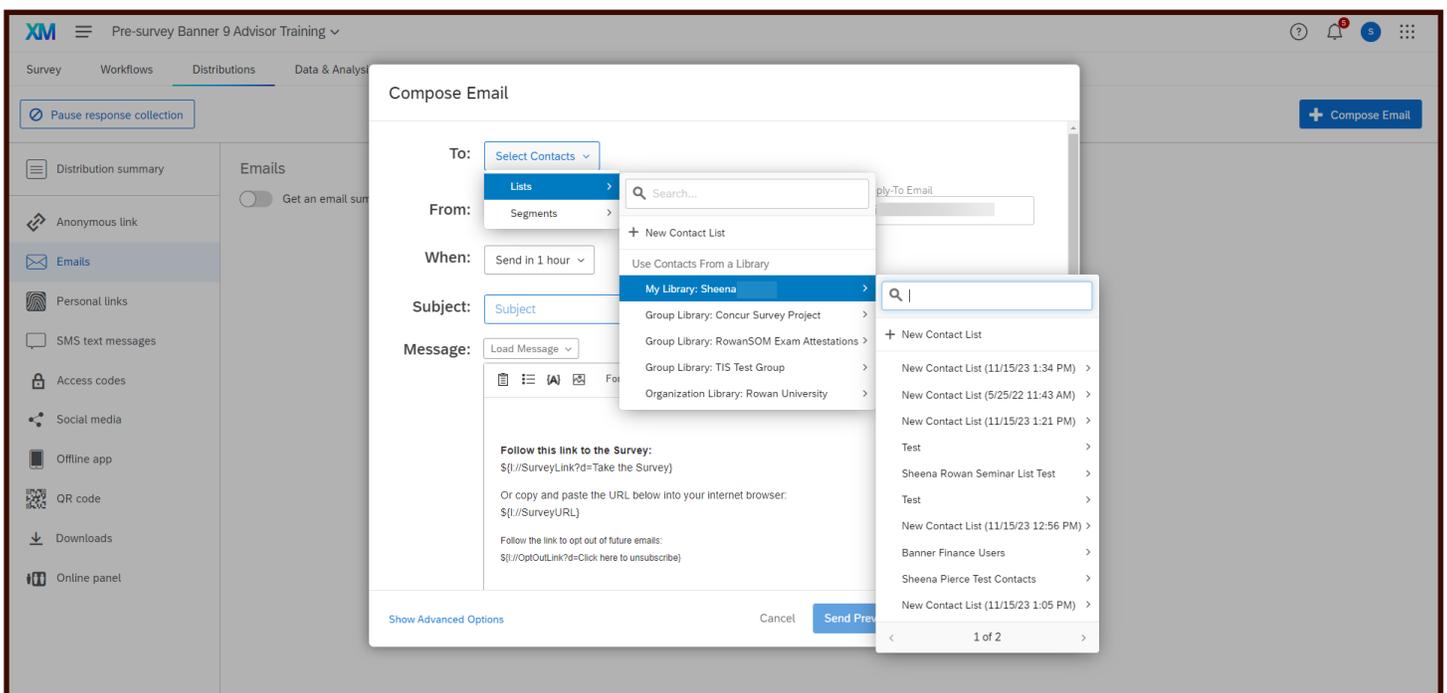
Enter the **From: Email address, From Name, and Reply-To Email** address.

Choose **When** to send the email. The default is in one hour.

Enter a **Subject**:

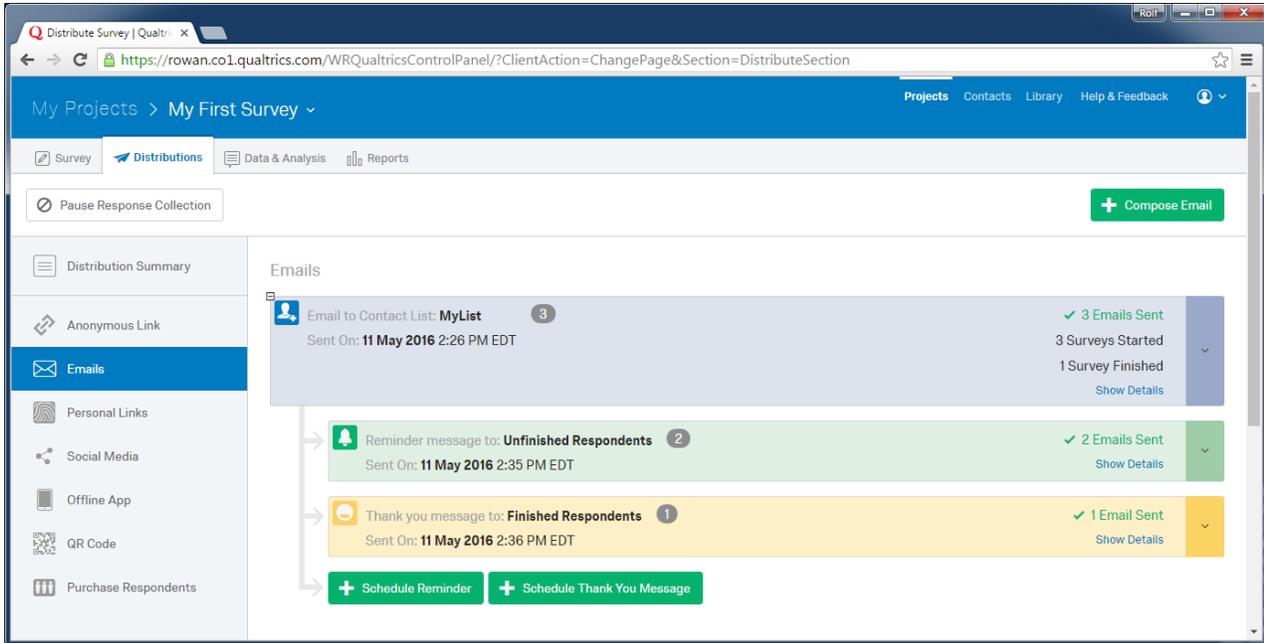
Enter text for the body of the email.

Do not change any of the text below **Follow this link to the Survey.**



# Email History

To review the emails, select the project, **Distributions** tab, and then click on the **Emails** link on the left side.



Click on the button drop down button to the right of the sent email. Select **Schedule Reminder** to do so.

Click on the button **Schedule Thank You Message** to do so.

**New Reminder Email**

**To:** Unfinished Respondents

**From:**

**When:**

**Subject:**

**Message:**

Follow this link to the Survey:  
\${://SurveyLink?id=Take the survey}

Or copy and paste the URL below into your internet browser:  
\${://SurveyURL}

Follow the link to opt out of future emails:  
\${://OptOutLink?id=Click here to unsubscribe}

**New Thank You Email**

**To:** Finished Respondents

**From:**

**When:**

**Subject:**

**Message:**

Follow the link to opt out of future emails:  
\${://OptOutLink?id=Click here to unsubscribe}

# Email - Duplicates

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Qualtrics has updated their email distribution capabilities. This update will enhance our ability to identify and stop duplicate emails from being sent to email recipients.

## *How will this new feature benefit you?*

This new functionality will improve email deliverability and ensure that you do not upset recipients with duplicate emails. Also, when duplicate emails are sent, emails may be marked as spam, impacting the overall deliverability of the emails you send. Ultimately, this upgrade will help get more of your emails into recipients' inboxes.

## *What are the details of this new feature?*

The new email distribution capabilities will prevent duplicate emails from being sent to recipients. After the original email goes out, subsequent emails sent within a 24-hour window are considered duplicates if they contain the exact same message content, subject, and recipient email address. You will be able to see the number of emails that have not been distributed in the new "Duplicate Emails" column in the Email / Mailing History tab.

If you are currently using Qualtrics with duplicate emails, there are definitely ways to get around it. Basically, the system is scanning for identical emails. This means that you can get around this pretty easily. Some possible options include:

1. Piping in a unique field from the panel into the message of the email.

Example: Lets say you are Elementary school principal who wants each teacher to evaluate all of their students. Ms. Goullet has 20 3rd graders and she needs to evaluate all 20 of them. You add [agoullet@mes.edu](mailto:agoullet@mes.edu) to the panel 20 times. Into the message itself you pipe in the student's First and Last Name . The emails will send out great!

You could also pipe in random numbers from the panel into a hidden part of the message.

2. Using Gmail to Modify the email addresses.

Example: You are testing the survey by adding yourself to the panel 15 times. You use Gmail. Modify the address to [carolinep+1@qualtrics.com](mailto:carolinep+1@qualtrics.com); [carolinep+2@qualtrics.com](mailto:carolinep+2@qualtrics.com).

3. Capitalize different letters. The Qualtrics Mailer does not quite understand capitalization.

Example: [carolinep@qualtrics.com](mailto:carolinep@qualtrics.com), [Carolinep@qualtrics.com](mailto:Carolinep@qualtrics.com), and [CarolineP@qualtrics.com](mailto:CarolineP@qualtrics.com) are considered different email addresses. Therefore, if these three addresses are on the panel, all three will receive their message.

4. Add piped text for the current time.

This only works for trying to schedule duplicate emails over time. By adding the piped text for time, you will be able to get around the hour time delay.

With any questions about this change or how to make sure your current processes won't be affected, please contact the Qualtrics Support team directly at 801-374-6682 or [support@qualtrics.com](mailto:support@qualtrics.com). As always you may contact your Brand Administrator, June Ragone at [ragonej@rowan.com](mailto:ragonej@rowan.com) with any other questions about your Qualtrics account.

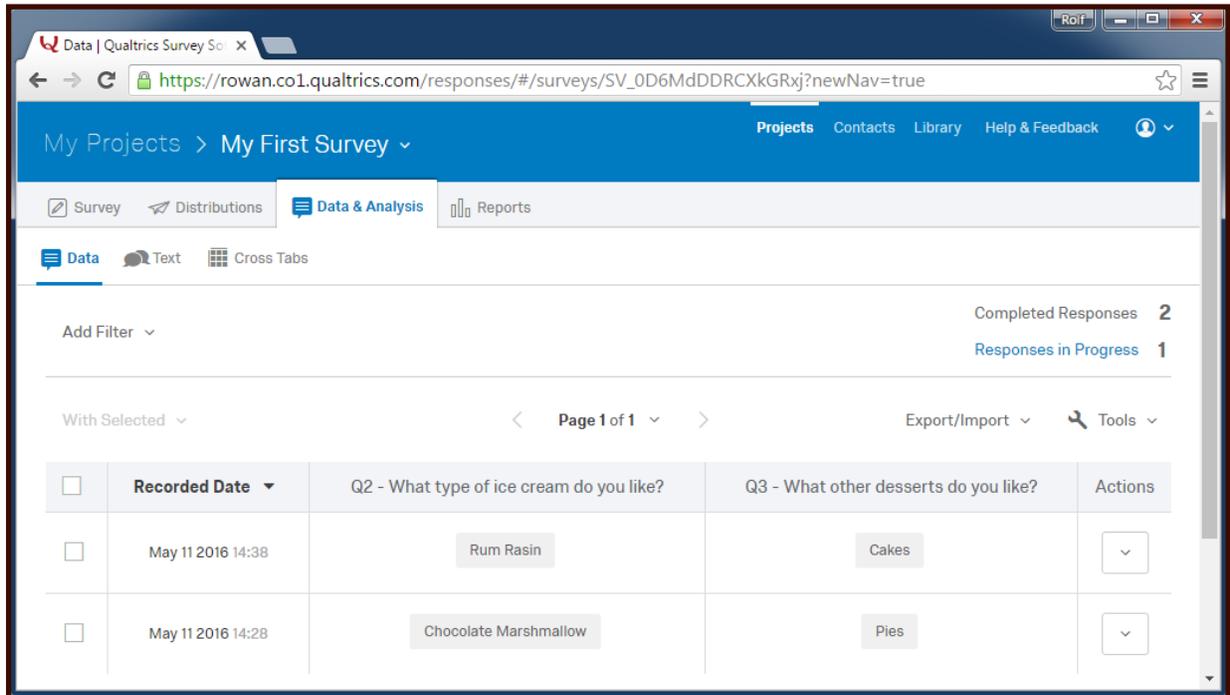
Thanks,

Qualtrics Client Success Team

# Data & Analysis

From the **Data & Analysis** tab, select **Data** (top menu).

To see each individual response, click on the drop down in the **Actions** column.



Under the **Actions** drop down, there are several choices:

- View Response
- Delete Response
- Retake Response
- Retake as New Response
- Export to PDF



## Data & Analysis - Download and Crosstab

Select the **Data & Analysis** tab at the top, the **Data** tab in the next row, and then click on the **Export/Import** drop down on the left side.

**Export Data**

**Download This Table**

Download the columns and filtered data currently included in the Data tool. This download cannot be imported into Qualtrics.

**Export Complete Data Set**

Download all fields and responses for this project except for tags and custom columns. This export can be imported into Qualtrics.

Close

You can export data as **CSV**, **XML**, **SPSS**, **HTML**, and **Fixed Field Text**.

You can also export the **User Submitted Files**.

You can click on the link at the bottom **More Options** to see and select more options.

< **Export Data Set**

CSV XML **SPSS** HTML Fixed Field Text User Submitted Files

 **Statistical Analysis Package**

Statistical Package for the Social Sciences (SPSS) is one of the most widely used software packages for survey analysis. This is an SPSS sav data file with raw data, variable and value labels.

Only include responses between:

Start Date:  End Date:

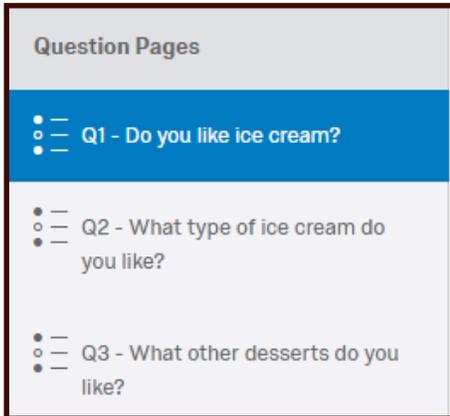
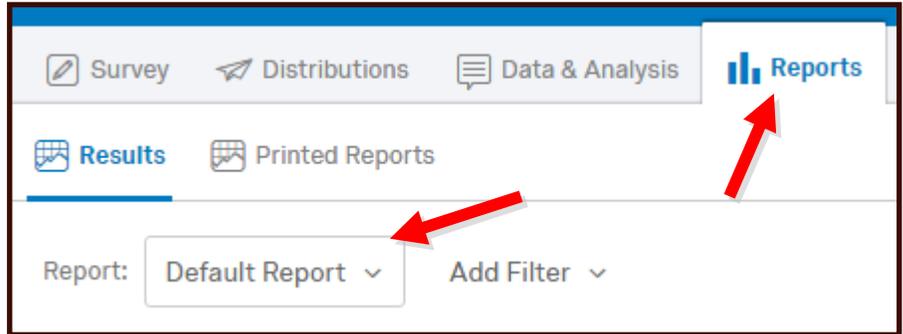
[More Options](#) [Close](#) [Download](#)

# Reports

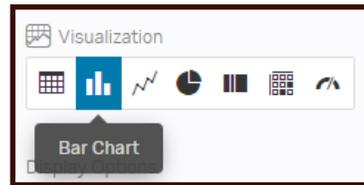
Select a **Project** from your list of surveys

Select **Reports** tab

The **Default Report** is displayed, or you can select a report to view



Select questions from the left side panel to see the **responses and statistics**



Can add a **graph** (with options like pie, bar, etc.)

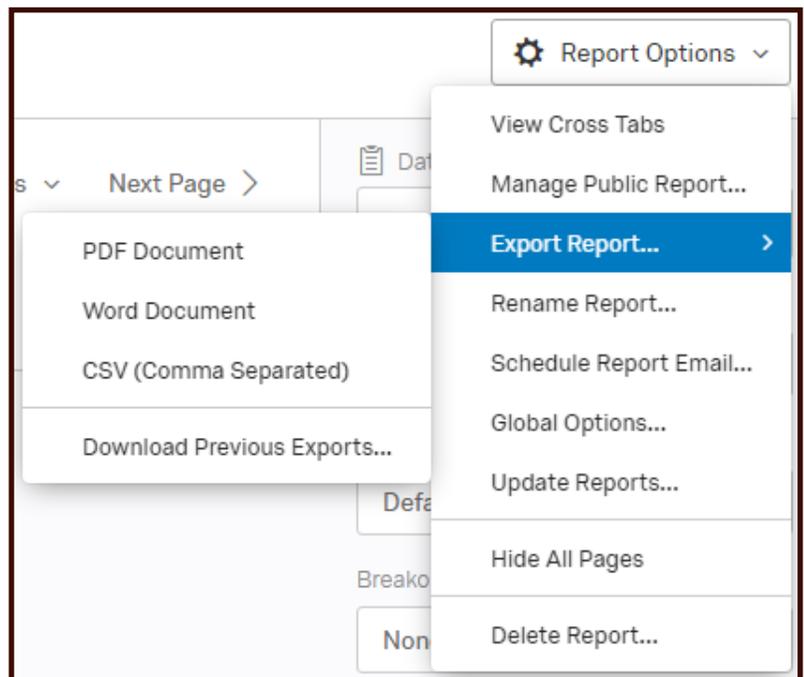
Add a filter (ex. – gender – female)

Add Filter ▾

Export whole report to PDF, Word or CSV

Create a **Public Report** link so the most up-to-date version is shown. As more responses come in, the updated data is shown through that link (opens as a link in a web browser).

There are many other options in the **Report Options** drop down menu.



## Advanced Options

**Display Logic – for single follow-up questions:** If a question is answered a certain way, then another question may or may not be displayed.

The screenshot shows a survey configuration interface. At the top, question Q1 is titled "Do you like ice cream?". It has a gear icon for settings and a list of radio button options: "Only in the summer" (with an adjacent text input field), "Only in an ice cream cone", "Never", "Always", "Once in a while", and "Only with hot fudge". Below this, a blue bar indicates the display logic: "Display This Question: If Do you like ice cream? Never Is Not Selected". At the bottom, question Q2 is titled "What type of ice cream do you like?". It has a gear icon and a list of radio button options: "Chocolate Marshmallow", "Rum Rasin", "Cherry Vanilla", and "Tutti Frutti".

**Skip Logic – for multiple follow-up questions:** If a question is answered in a certain way, then the responder will be moved to another part of the survey.

### Carry Forward Choices:

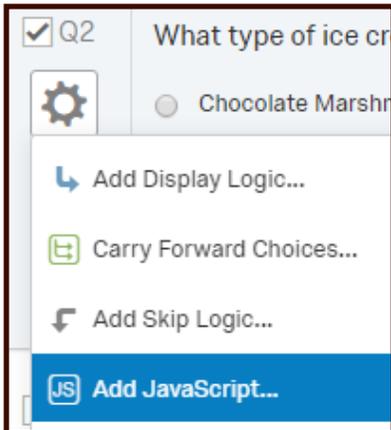
Bring forward only selected or not selected choices.

For example, I've tried chocolate and vanilla ice cream. Follow up question – Which of the following would you most consider trying at no cost to you?

The screenshot shows a close-up of question Q2, "What type of ice cream do you like?", with the "Chocolate Marshmallow" option selected. A context menu is open over the gear icon, offering three options: "Add Display Logic...", "Carry Forward Choices..." (which is highlighted in blue), and "Add Skip Logic...".

# Advanced Options

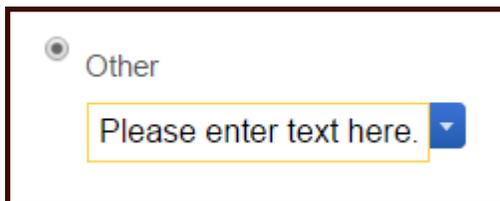
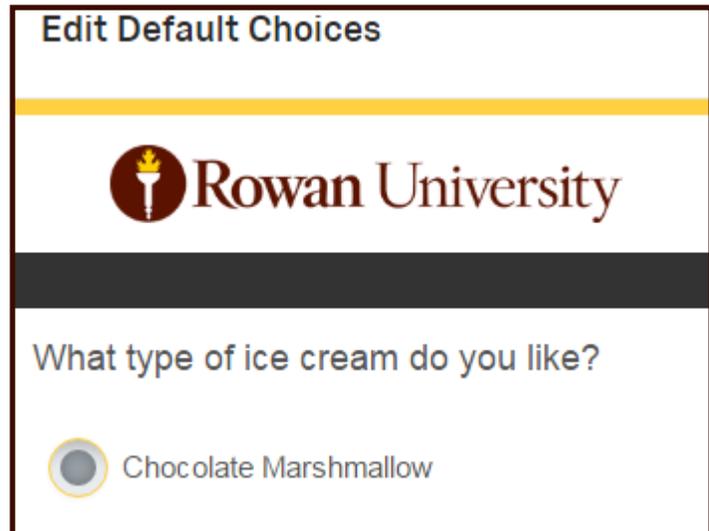
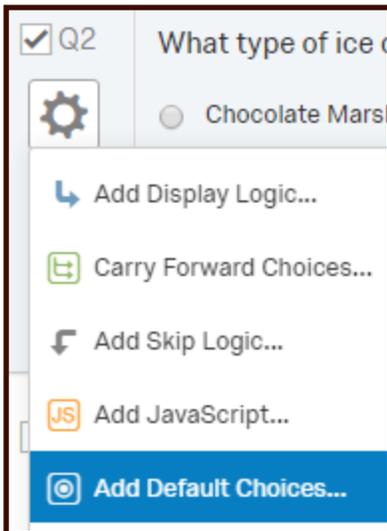
**Add Java Script.** You can copy and paste the code.



## Edit Question JavaScript

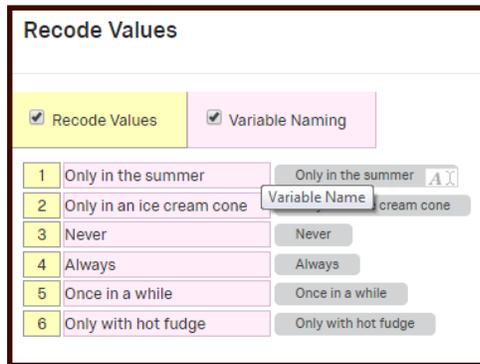
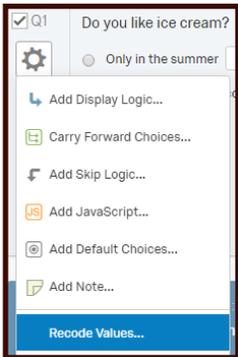
```
Qualtrics.SurveyEngine.addOnload(function()
{
  /*Place Your JavaScript Here*/
});
```

**Add Default Choices**—Make some choices default.



Default to a text box like  
“Enter your name here.”

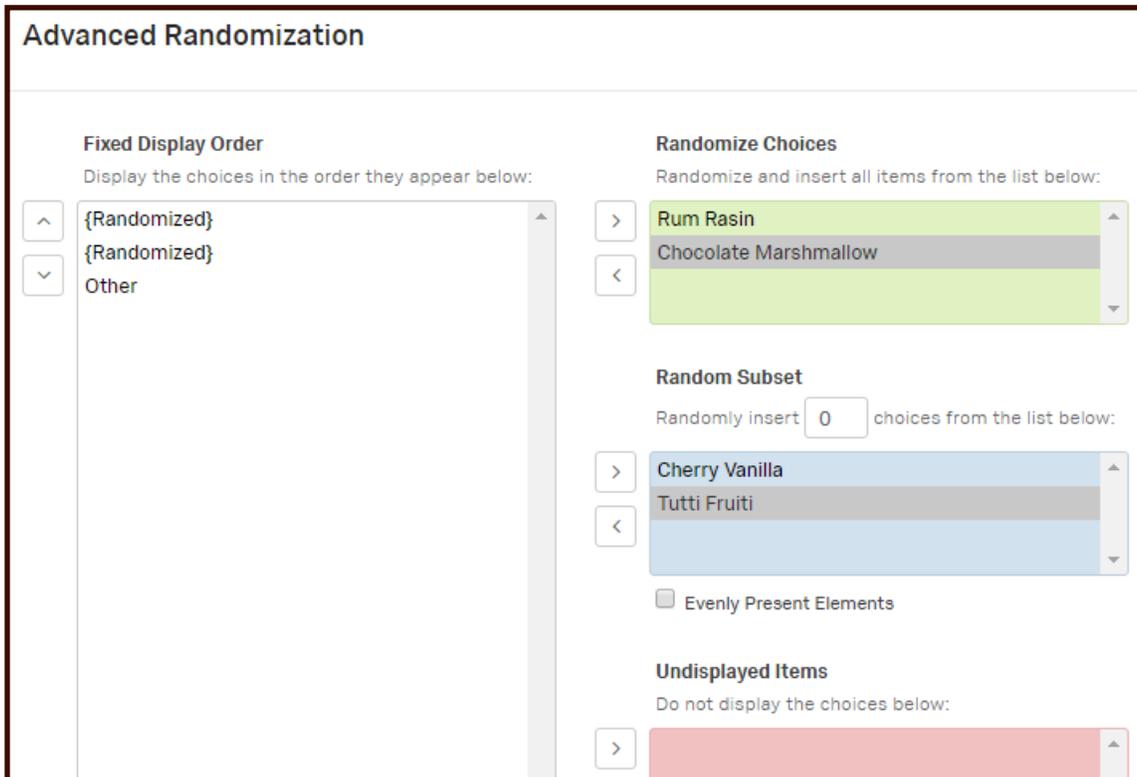
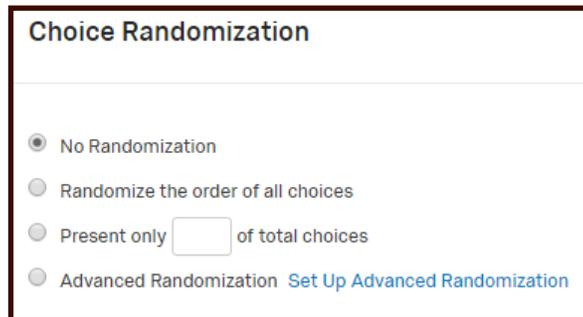
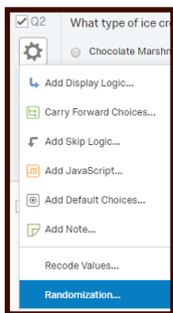
# Advanced Options



You can **recode values** (Only in the back end. It won't change what the user sees). For example, if they say yes, the back end code might be "Send a sample".

## Randomizer

You can randomize all or some or a subset of the answers. You may want to randomize all choices and leave others at the bottom. You might want to randomize a subset so that either Chocolate or Truffles are displayed as an answer choice.



# Advanced Options

## Piped Text menu

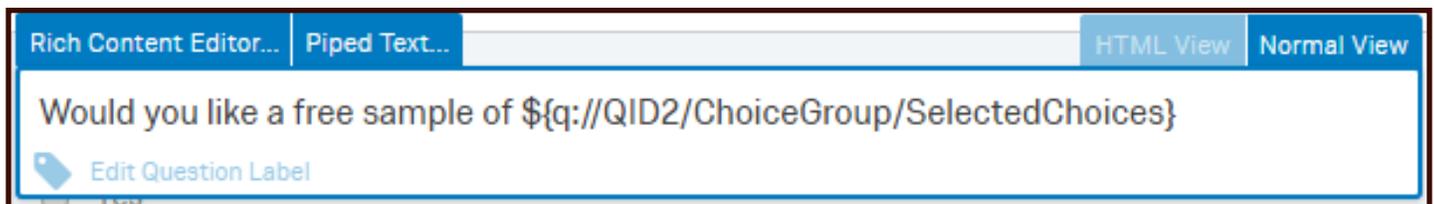
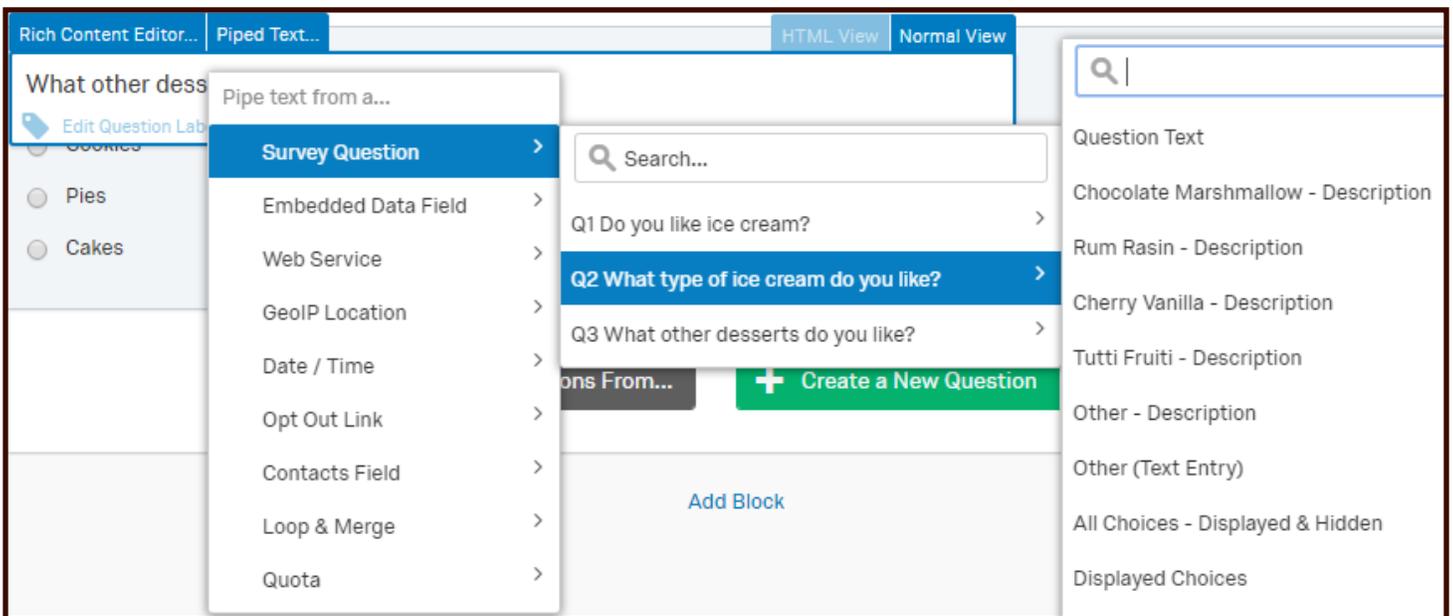
Inserts text into a question based on answers from another question.

Place cursor where you want the piped text to appear.

Select piped text menu from above the question text.

Survey question.

Selected, unselected or all choices.



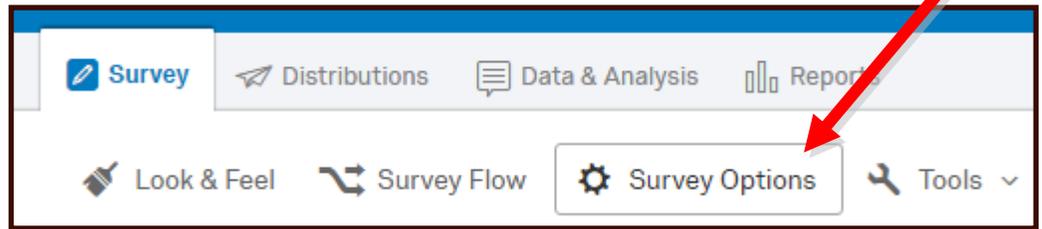
# Advanced Options

**Block Options.** Block is a group of questions. For example, all demographic questions. Go to **Advanced Options** menu at the top of the page – **Add Block**.

The screenshot shows a survey editor interface. At the top left, there is a link that says "Click Here to Rename Block" with a downward arrow. On the right side, there is a "Block Options" dropdown menu. The main area displays a question labeled "Q1" with the text "Do you like ice cream?". To the left of the question is a gear icon for settings and two "X→" icons. The question has several radio button options: "Only in the summer" (with an adjacent text input field), "Only in an ice cream cone", "Never", "Always", "Once in a while", and "Only with hot fudge". The "Block Options" menu is open, listing several actions: "View Block...", "Collapse Questions...", "Lock Block...", "Question Randomization...", "Loop & Merge...", "Next/Previous Button Text...", "Move Block Up..." (with an upward arrow), and "Move Block Down..." (with a downward arrow and highlighted in blue).

# Advanced Options

## Survey Options



### Survey Options

**Survey Experience**

- Back Button.** Enable respondents to change their responses.
- Save and Continue.** Allow respondents to save and continue later.
- Show Question Numbers.** Great for previews. For participants, try a [Progress Bar](#) instead.
- Use Custom Survey Validation Messages...**

**Survey Language:**  The language the survey is written in.

**Survey Title:**  This text 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.** Prevent people from taking the survey using an anonymous survey link.
- Password Protection.** This 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.
- Secure Participants' Files.** Files uploaded as responses can only be viewed by users with permission to view responses.
- Survey Expiration.** The survey will only be available for a specified date range.

---

**Survey Termination**

- Default** end of survey message.
- Custom** end of survey message...
- Redirect to single response report.
- Redirect to a full URL,** ex. "http://www.qualtrics.com":
- Send additional thank you **email** from a library... When distributed via the Survey Mailer.
- Anonymize Response.** Do NOT record any personal information and remove panel association (not recommended).

---

**Inactive Surveys**

- Default** inactive survey message.
- Custom** inactive survey message...

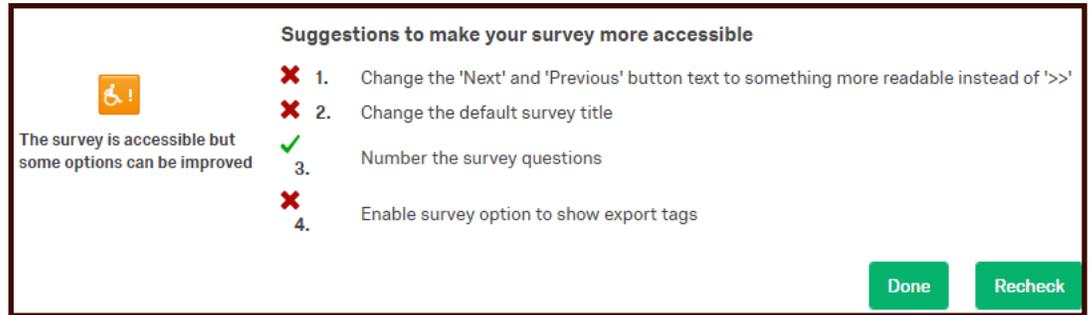
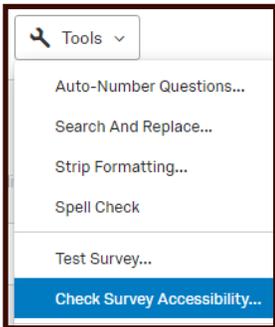
---

**Partial Completion**

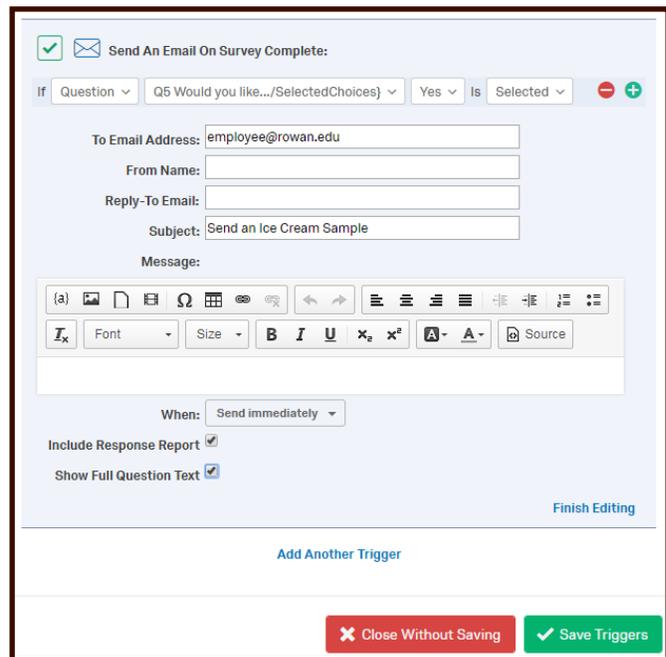
How long to wait before partially completed responses are closed and data is recorded.  
**Please note,** the recipient cannot continue taking the survey once their data is recorded:

# Advanced Options

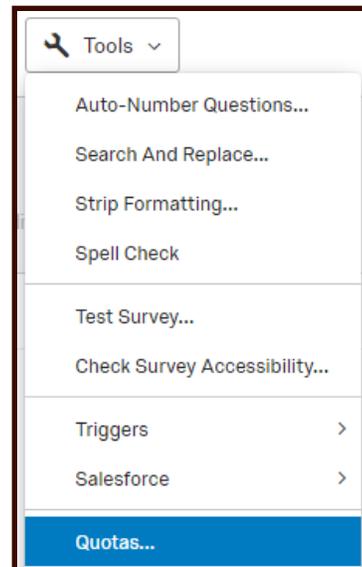
## Check Survey Accessibility



**Email Triggers:** Send an email if they answer a question a certain way. For example, if they want a sample, then an email is immediately generated and sent to the warehouse.



**Quotas:** Restrict # of people who can take a survey. For example, you may want only 100 males and 100 females. You can add a quota, set a quota limit, set conditions, and activate a quota.



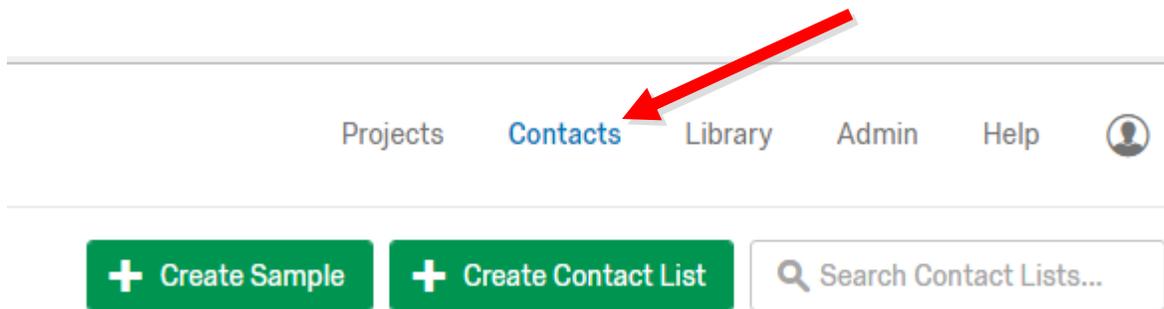
# Advanced Options

Embedded Data: You can embed data into your emails and surveys.

Upload an excel csv file which includes the contact information and any additional information you will embed into the email and/or survey. The column headers and the embedded fields in the survey must be exactly the same. They should not have any spaces in them; underscores are acceptable. Each row must have a primary email address named Email.

First_name	Last_name	email	course_name	Instructor
Jennifer	Savage	savagej@rowan.edu	Awesome_101	Hegel, Marybeth
Erica	King	kinge@rowan.edu	Awesome_101	Hegel, Marybeth
Sheena	Pierce	pierce28@rowan.edu	Awesome_101	Hegel, Marybeth

In Qualtrics, select the Contacts tab, Create Contact List.



Name the Contact List and select Next.

### Create Contact List

Name

Folder

Cancel **Next >**

# Advanced Options

Select Import From a File, Browse, then select your csv file.

### Add Contacts

**Import From a File** Add Manually Import From a Survey

Browse... Reload Show Options

**File Requirements**

- The first row must have the field names for each column.
- Each row must have a primary email address (Email). All other fields are optional (FirstName, LastName, etc.)
- The maximum file size is 100mb.

**Updating Existing Contacts**

- Use a 'RecipientID' column containing recipient IDs and add any optional fields
- Contact data will be updated. New fields will be added as necessary.

[Example Document](#)

Skip this step **Add Contacts**

Browse... Reload Show Options

embedded\_info.csv **3 Contacts**

- Each row must have a primary email address (Email). All other fields are optional (FirstName, LastName, etc.)
- The maximum file size is 100mb.

**Updating Existing Contacts**

- Use a 'RecipientID' column containing recipient IDs and add any optional fields
- Contact data will be updated. New fields will be added as necessary.

[Example Document](#)

Once you select the file, you will be able to Verify Fields and preview what you are importing. It will show you how many contacts are included. Select Add Contacts.

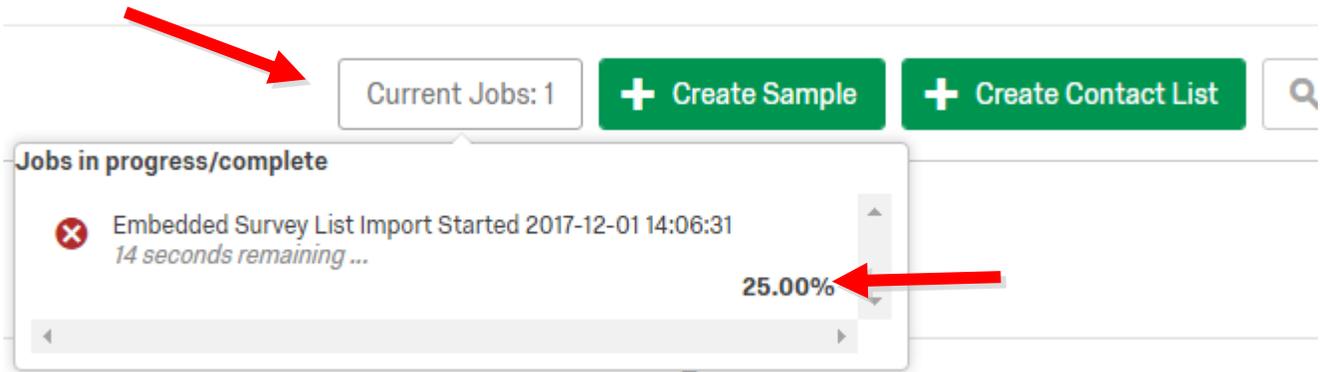
Verify Fields

Fields	First Contact	Next Contact	Third Contact
First_name	Jennifer	Erica	Sheena
Last_name	Savage	King	Pierce
Email	savagej@rowan.edu	kinge@rowan.edu	pierce28@rowan.edu
course_name	Awesome_101	Awesome_101	Awesome_101
Instructor	Hegel, Marybeth	Hegel, Marybeth	Hegel, Marybeth

Skip this step **Add Contacts**

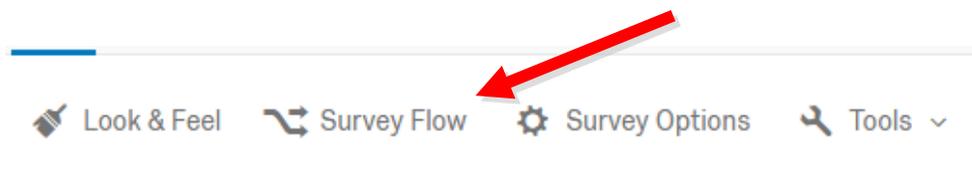
# Advanced Options

You will see there is one Current Job and it will let you know the progress of the upload.



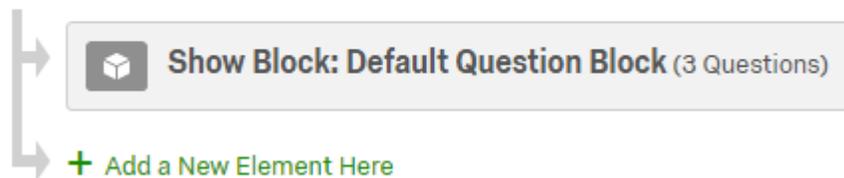
The screenshot shows a dashboard with a 'Current Jobs: 1' indicator. To the right are two green buttons: '+ Create Sample' and '+ Create Contact List'. Below this is a 'Jobs in progress/complete' section. A job is listed: 'Embedded Survey List Import Started 2017-12-01 14:06:31' with '14 seconds remaining ...' and a progress bar at '25.00%'. Red arrows point to the 'Current Jobs: 1' indicator and the '25.00%' progress value.

Go back to your Projects, select the project you want to embed data into. Select Survey Flow, Add New Element Here, then Embedded Data.

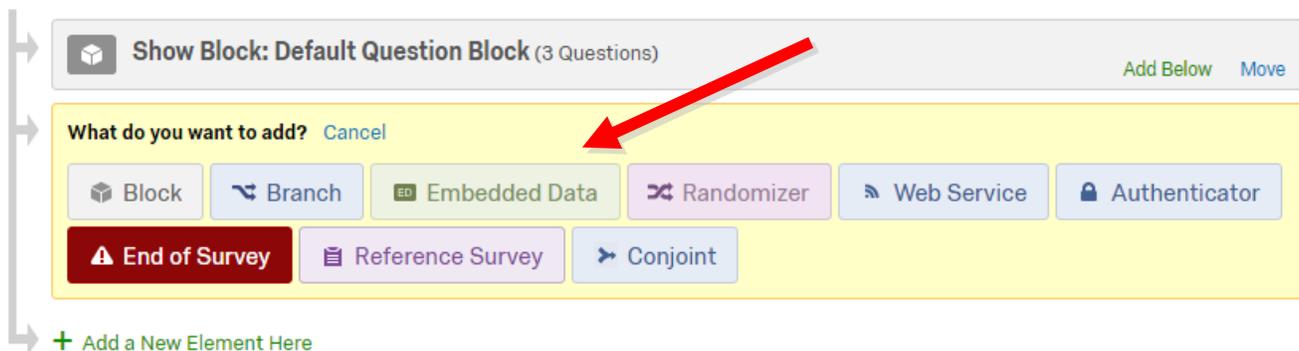


The screenshot shows a navigation bar with four items: 'Look & Feel' (with a paintbrush icon), 'Survey Flow' (with a flowchart icon), 'Survey Options' (with a gear icon), and 'Tools' (with a wrench icon and a dropdown arrow). A red arrow points to the 'Survey Flow' item.

## Survey Flow blank



The screenshot shows a 'Survey Flow' editor with a 'blank' state. It contains a single block: 'Show Block: Default Question Block (3 Questions)'. Below the block is a '+ Add a New Element Here' button.



The screenshot shows the 'Add New Element Here' dialog box. It has a title 'What do you want to add?' and a 'Cancel' button. The dialog contains several buttons: 'Block', 'Branch', 'Embedded Data' (highlighted with a red arrow), 'Randomizer', 'Web Service', and 'Authenticator'. Below these are three more buttons: 'End of Survey' (with a warning icon), 'Reference Survey', and 'Conjoint'. A '+ Add a New Element Here' button is at the bottom left.

# Advanced Options

Select Add from Contacts.

The screenshot shows a configuration interface for 'Set Embedded Data'. At the top, there is a header for 'Show Block: Default Question Block (3 Questions)' with buttons for 'Add Below', 'Move', 'Duplicate', and 'Delete'. Below this is the 'Set Embedded Data' section, which includes a text input field labeled 'Enter Embedded Data Field Name Here...', a note 'Value will be set from Panel or URL.', and a 'Set a Value Now' link. A red arrow points to the 'Add From Contacts' button in the bottom right corner of this section. Other buttons in this section include 'Add Below', 'Move', 'Duplicate', 'Options', and 'Delete'. At the bottom left, there is a '+ Add a New Element Here' link.

## Import Contacts Embedded Data

Select a List of Contacts...

Please Select...

Click on Select a List of Contacts,  
Please Select.

## Import Contacts Embedded Data

Select a List of Contacts...

Please Select...

My Library: savagej Savage >

Organization Library: Rowan Universit >

Search...

Banner SS Finance 161115

Banner SS Finance 51716

Chart Class 4/11/16

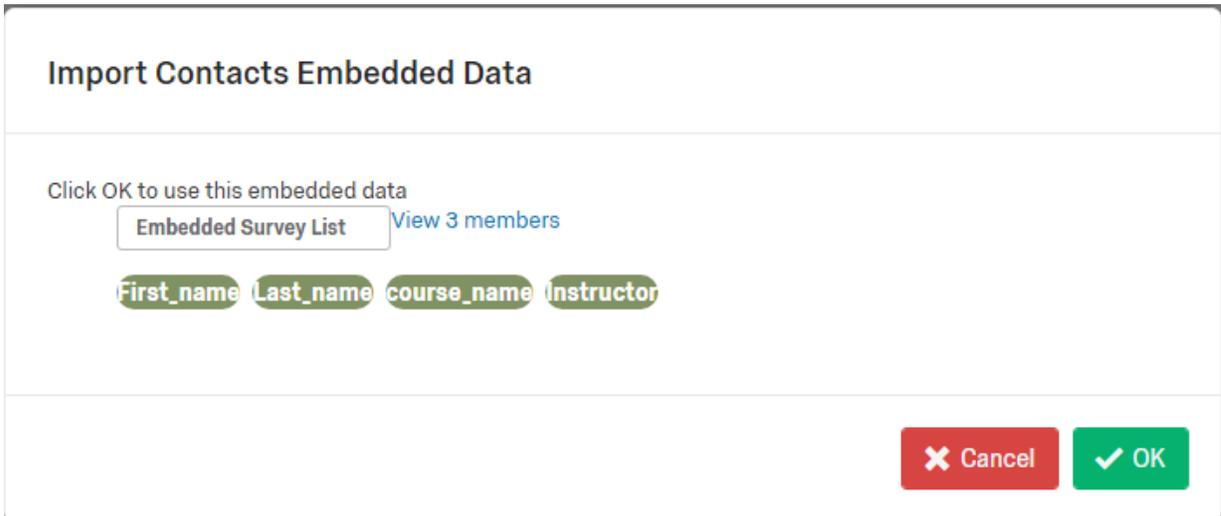
Chart Class 4/15/2016

Embedded Survey List

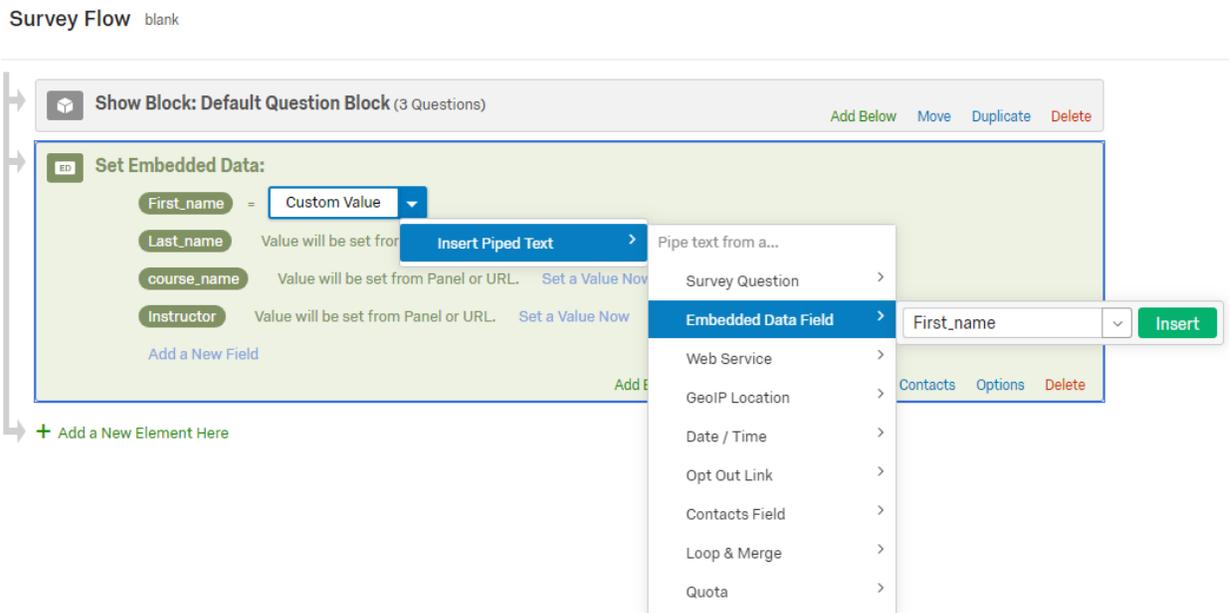
Select My Library, then select  
the Contact List that you  
created.

# Advanced Options

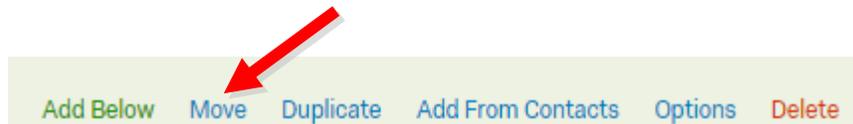
The Fields will display as well as the number of members. Click Ok to use the embedded data.



Select Set a Value Now next to the first field. Select Insert Piped Text, Embedded Data Field, then select the field name. Insert. Continue the same with the other fields. Save Flow.

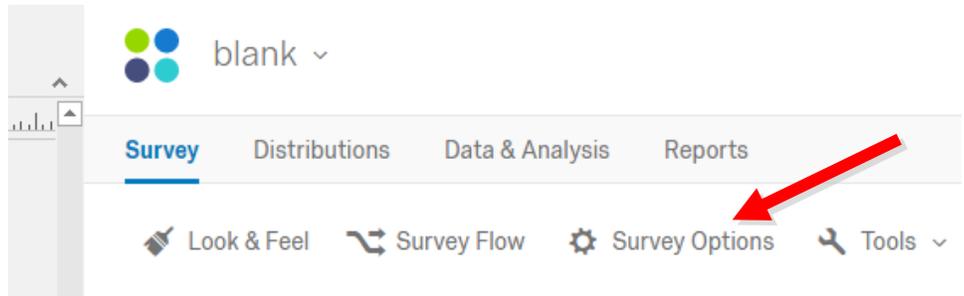


Always move the Embedded Data block to the top using the Move option. Select Move, then drag and drop to the top.



# Advanced Options

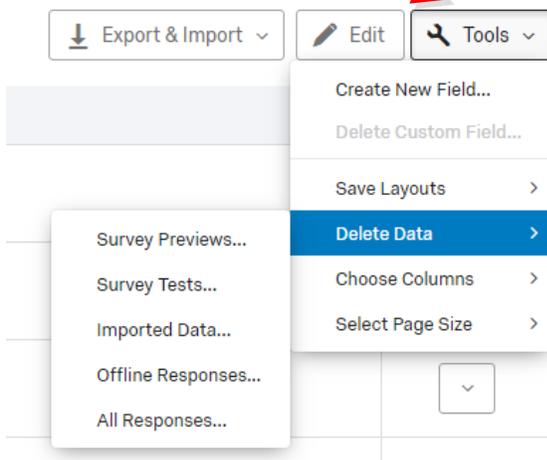
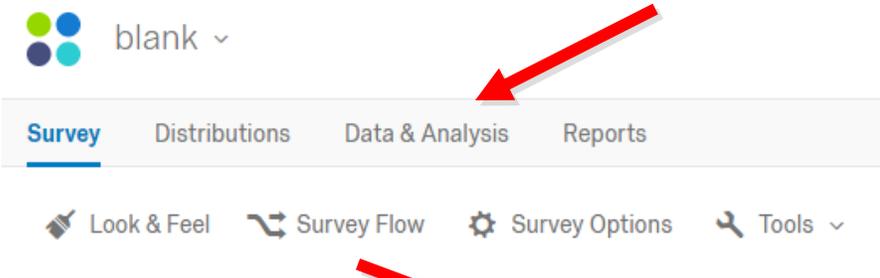
You customize the time respondents have to complete their survey before it becomes recorded or deleted. Select Survey Options, Partial Completion, then adjust the settings. Select Save.



Partial Completion  responses in progress  after respondent's

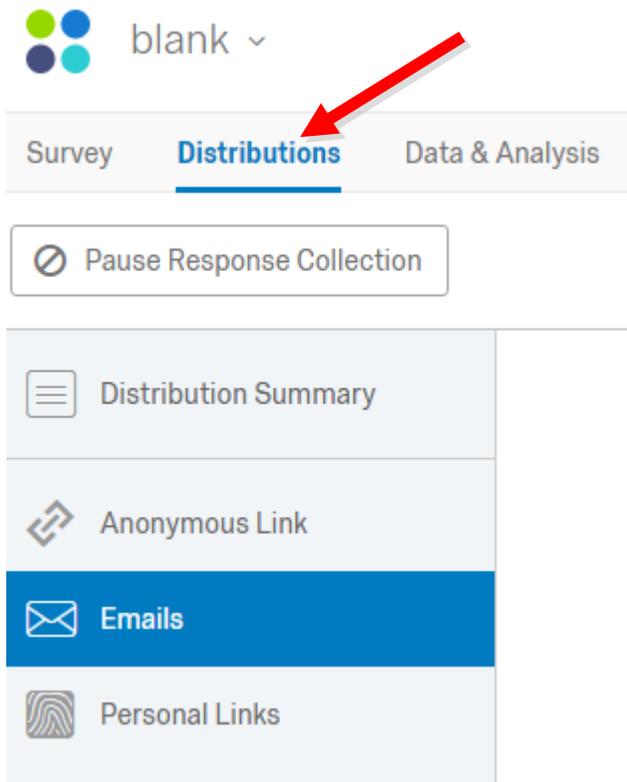
**Please note**, the recipient cannot continue taking the survey once their data is recorded or deleted.

Close



You can delete any preview data that accumulated as you were testing your survey. Select Data & Analysis, Tools, Delete Data, then Survey Previews. You will be prompted to select Decrement all quotas for deleted responses and I am sure I want to delete all survey previews.

# Advanced Options



To embed data into the email, select Distributions. Select Emails to use the Qualtrics system to distribute the survey. (This is considered Confidential not Anonymous).

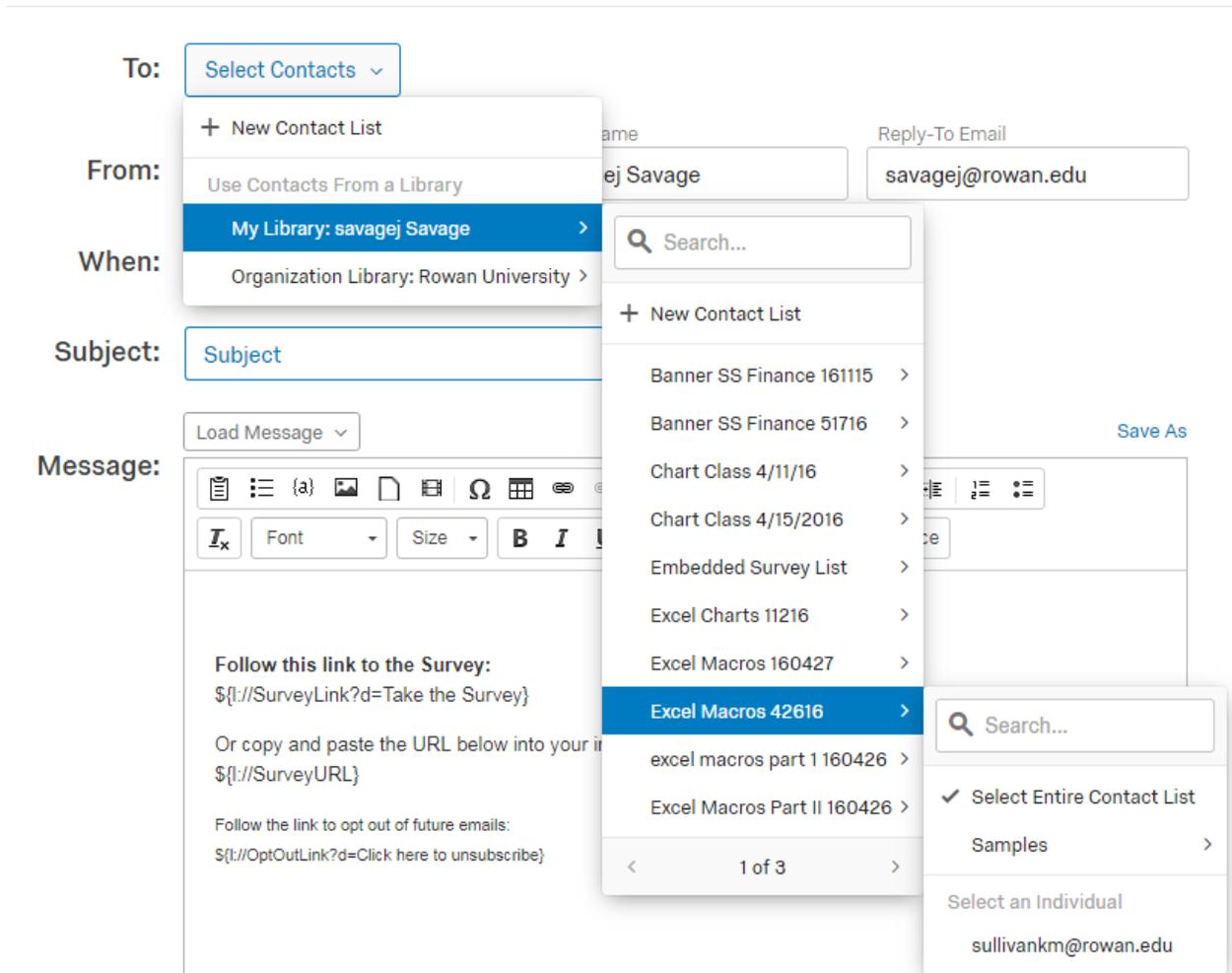
Select Compose Email.

Distribute your survey via email.

Compose Email

# Advanced Options

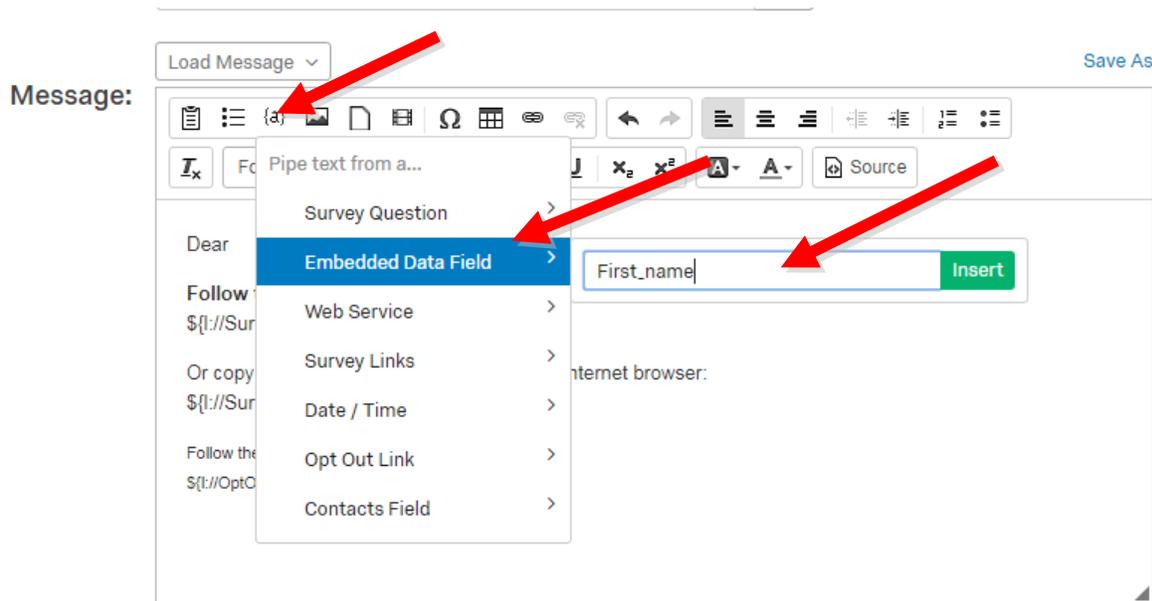
In the To field, Select Contacts then My Library. Hover over the contact list that you created, then either Select Entire Contact List or Samples.



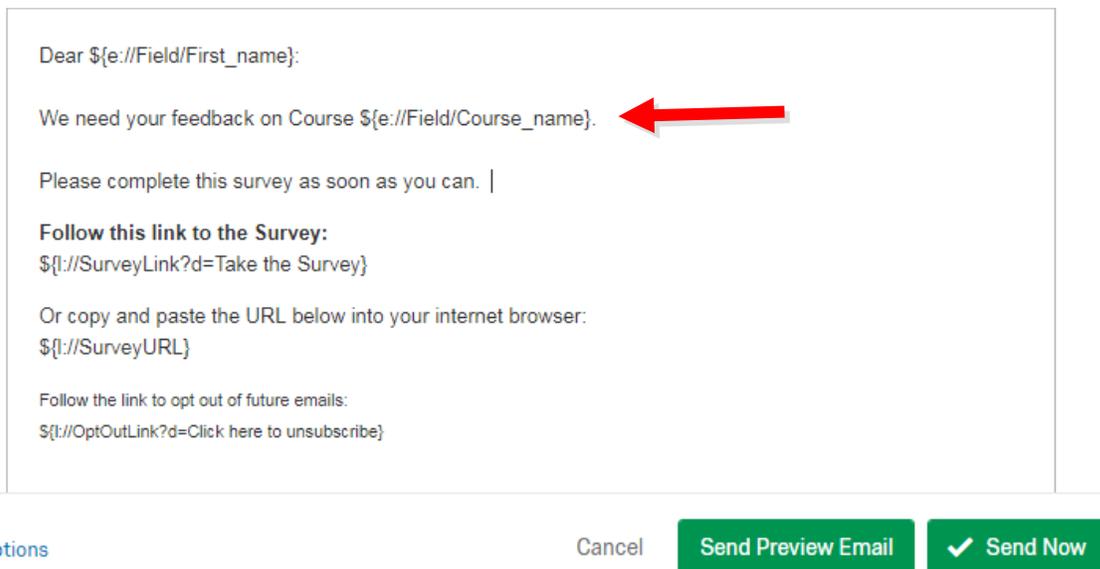
Format and schedule the email as you would like.

# Advanced Options

Begin to type your message into the body of the email. Select the Piped Text icon, then Embedded Data Field to embed data into the body. Type in the field name of the first field you would like to embed. Select Insert.



Continue to type and embed text into your email.



## Advanced Options

Select Send Preview Email then type in the email address of who you would like to preview it. Select Send.

Send Preview Email

To

Cancel Send

Save As

1 = 2 =

Follow this link to the Survey:  
SurveyLink?d=Take the Survey}

and paste the URL below into your internet browser:  
SurveyURL}

Follow the link to opt out of future emails:  
OptOutLink?d=Click here to unsubscribe}

Cancel Send Preview Email ✓ Send Now

Continue to type and embed text into your email.

Dear \${e://Field/First\_name}:

We need your feedback on Course \${e://Field/Course\_name}.

Please complete this survey as soon as you can. |

**Follow this link to the Survey:**  
\${l://SurveyLink?d=Take the Survey}

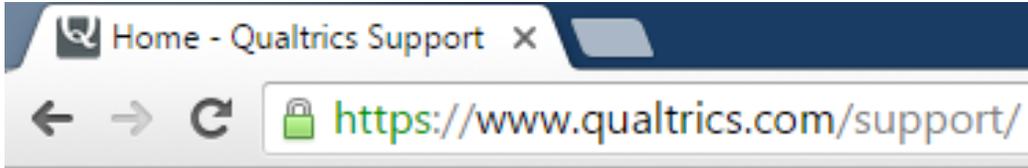
Or copy and paste the URL below into your internet browser:  
\${l://SurveyURL}

Follow the link to opt out of future emails:  
\${t://OptOutLink?d=Click here to unsubscribe}

ptions Cancel Send Preview Email ✓ Send Now

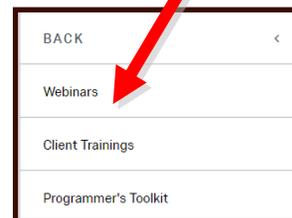
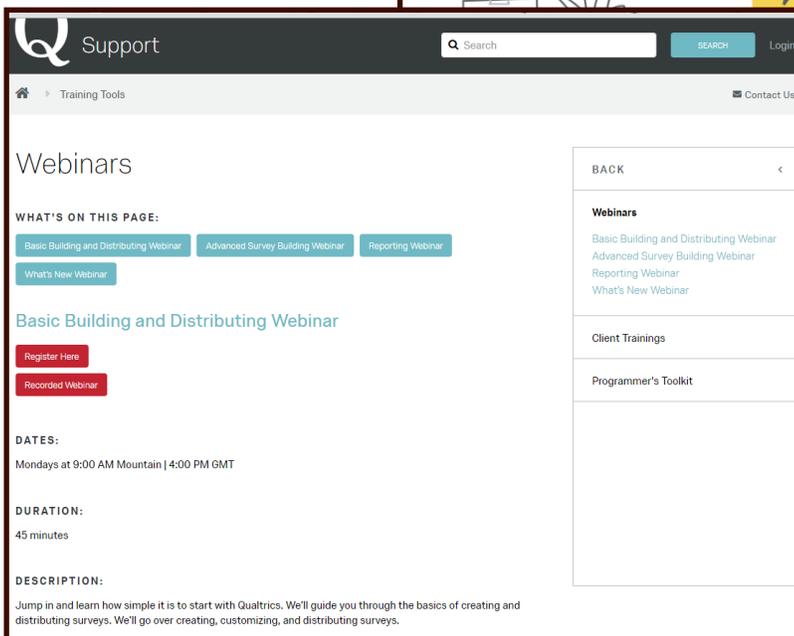
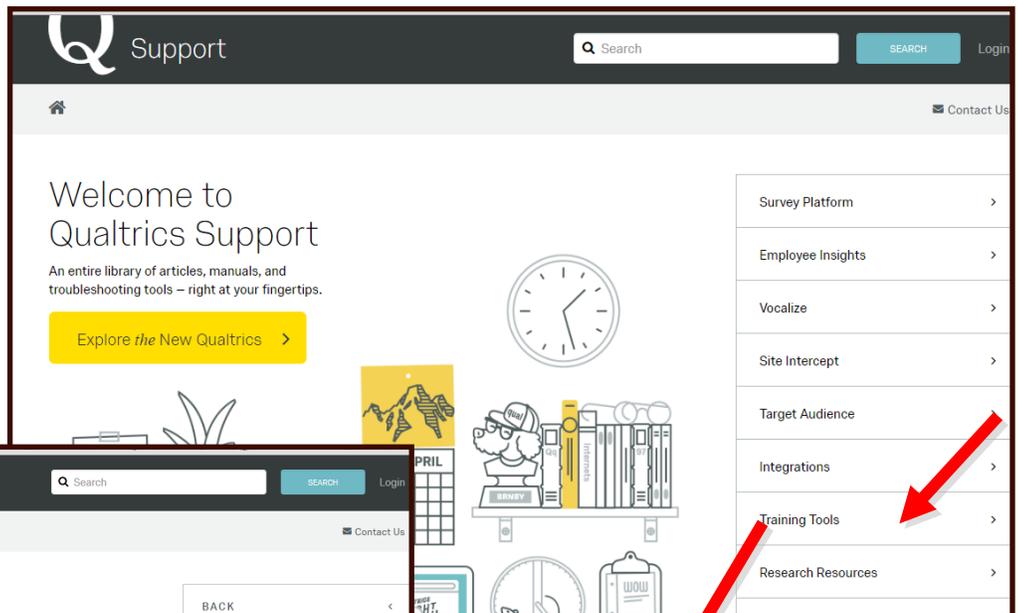
# Helpful Resources

For free online training, open a web browser and go to [qualtrics.com/university](https://www.qualtrics.com/university).



Select - **Training Tools** - Webinars to watch recorded webinars from basic to advanced Qualtrics.

Watch the videos and do the activities to become more proficient in Qualtrics.



## Helpful Resources

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### **Foundations of Design Research with Andy Schwanbeck and Peni Acayo**

<http://www.lynda.com/Design-Design-Foundations-tutorials/Foundations-Design-Research/182890-2.html?org=rowan.edu>

### **Survey Basics, Qualtrics**

<http://www.qualtrics.com/university/researchsuite/research-resources/survey-basics/>

### **Best Practices for Research, American Association for Public Opinion Research**

<https://www.aapor.org/Standards-Ethics/Best-Practices.aspx>

Contact Qualtrics support at 1-800-340-9194