Qualtrics

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Learning Objectives

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

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
12. Delete Project
Create Survey

Select the Create Project button.

You will have four choices in building a survey:

New Project - build your survey from scratch.

From a Copy - create from one of your previous surveys.

From a Library - survey templates built by Qualtrics.

From a File -

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 Create a New Question and the dropdown menu shows many types of questions you can create such as Multiple Choice, Matrix and Text Entry.

Select Multiple Choice
Within **Multiple Choice** questions, you will see many options on the right 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 right panel, increase the number of choices. You will see that Qualtrics automatically gives responses for you.

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

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.
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

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)

Add Question 4 - Rank order
Rank the following ice cream vendors:
Friendly’s
Dairy Queen
Bruster’s
Mr. Softee
Rita’s

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)

Add Question 6 - Text Entry Multi Line
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 right panel.

Complete the information in the Skip Logic wizard.

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

Select Done.
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, click on the icon that resembles a QR (Quick Response) barcode. 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.

Edit Survey - Other Options

To add a Page break:
Select the question before the page break
Select Add Page Break from the right side of the page

Top of the page Survey menu
Look & Feel (fonts, colors) - Rowan faculty/staff theme or student theme
Survey Options (end of survey message etc.)
Survey Flow (Blocks of questions - see advanced options)
Tools - Auto number the survey, Triggers (send survey results to an email address), spell check etc.
Create Contacts

Select the Contacts tab at the top of the page to create a mailing list.

Click on the button labeled Create Contact List, enter a Panel Name, and click on Create.

Import From a File - You can import a list from a comma or tab delimited text file.
Add Manually - You can manually type in your contacts.
Import from a Survey - import information from a previous survey.

Practice:
Import the contact list from the .csv file that was emailed to you.
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 Compose Email to send 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 Schedule Reminder to do so.
Click on the button Schedule Thank You Message to do so.
Email - Duplicates

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. Goulet has 20 3rd graders and she needs to evaluate all 20 of them. You add agoulet@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; carolinep+2@qualtrics.com.

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

   Example: carolinep@qualtrics.com, Carolinep@qualtrics.com, and 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. As always you may contact your Brand Administrator, June Ragone at 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
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.

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.
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

Add a filter (ex. - gender - female)

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.

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?
Advanced Options

Add JavaScript. You can copy and paste the code.

```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.

![Image showing the Piped Text menu with options like Survey Question, Embedded Data Field, Web Service, GeoIP Location, Date / Time, Opt Out Link, Contacts Field, Loop & Merge, Quota, Question Text, Chocolate Marshmallow - Description, Rum Raisin - Description, Cherry Vanilla - Description, Tutti Fruiti - Description, Other - Description, Other (Text Entry), All Choices - Displayed & Hidden, Displayed Choices.]

![Image showing the piped text example: Would you like a free sample of ${q://QID2/ChoiceGroup/SelectedChoices}.
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.
## 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
- **Language**: Dropdown menu to select the language the survey is written in.

### Survey Title
- **Title**: Input field for the survey title.

### Meta Description
- **Description**: Input field for a search-friendly 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 Referer Verification**: The user must come from a specific URL to take the survey.
- **Prevent Indexing**: Add a tag to the survey to prevent search engines from indexing it.

### Survey Expiration
- **Expiration**: Survey will only be available for a specified date range.

### Survey Termination
- **Default End**: The default end of survey message.
- **Custom End**: Custom end of survey message...
- **Redirect to single response report**: Redirect to a single response report.
- **Redirect to URL**: Redirect to a full URL, e.g., "http://www.qualtrics.com".
- **Send additional thank you email**: Send an email when distributed via the Survey Mailer.
- **Anonymize Response**: Do NOT record any personal information and remove panel association (not recommended).

### Inactive Surveys
- **Default Inactive**: Default inactive survey message.
- **Custom Inactive**: Custom inactive survey message...

### Partial Completion
- **How long to wait before partially completed responses are closed**: How long to wait before partially completed responses are closed and data is recorded.
- **Recipient cannot continue taking the survey once their data is recorded**: Dropdown menu to select the time period.
Advanced Options

Check Survey Accessibility

Suggestions to make your survey more accessible

- 1. Change the 'Next' and 'Previous' button text to something more readable instead of '>>'
- 2. Change the default survey title
- 3. Number the survey questions
- 4. Enable survey option to show export tags

Done Recheck

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.

<table>
<thead>
<tr>
<th>First_name</th>
<th>Last_name</th>
<th>email</th>
<th>course_name</th>
<th>Instructor</th>
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<tbody>
<tr>
<td>Jennifer</td>
<td>Savage</td>
<td><a href="mailto:savagej@rowan.edu">savagej@rowan.edu</a></td>
<td>Awesome_101</td>
<td>Hegel, Marybeth</td>
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<tr>
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<td>King</td>
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<tr>
<td>Sheena</td>
<td>Pierce</td>
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</table>

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

In the Create Contact List screen, name the Contact List and select Next.
Advanced Options

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

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.
Advanced Options

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

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

Click on Select a List of Contacts, Please Select.

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 Test, 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.

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.
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.
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.

Continue to type and embed text into your email.
Helpful Resources

For free online training, open a web browser and go to 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

Foundations of Design Research with Andy Schwanbeck and Peni Acayo

Survey Basics, Qualtrics
http://www.qualtrics.com/university/researchsuite/research-resources/survey-basics/

Best Practices for Research, American Association for Public Opinion Research

Contact Qualtrics support at 1-800-340-9194