Qualtrics Instructions

4/19/2019

Who can use Qualtrics?

Any current Susquehanna University faculty, staff, or student can use Qualtrics. Depending on your role, you will have different permissions in the system.

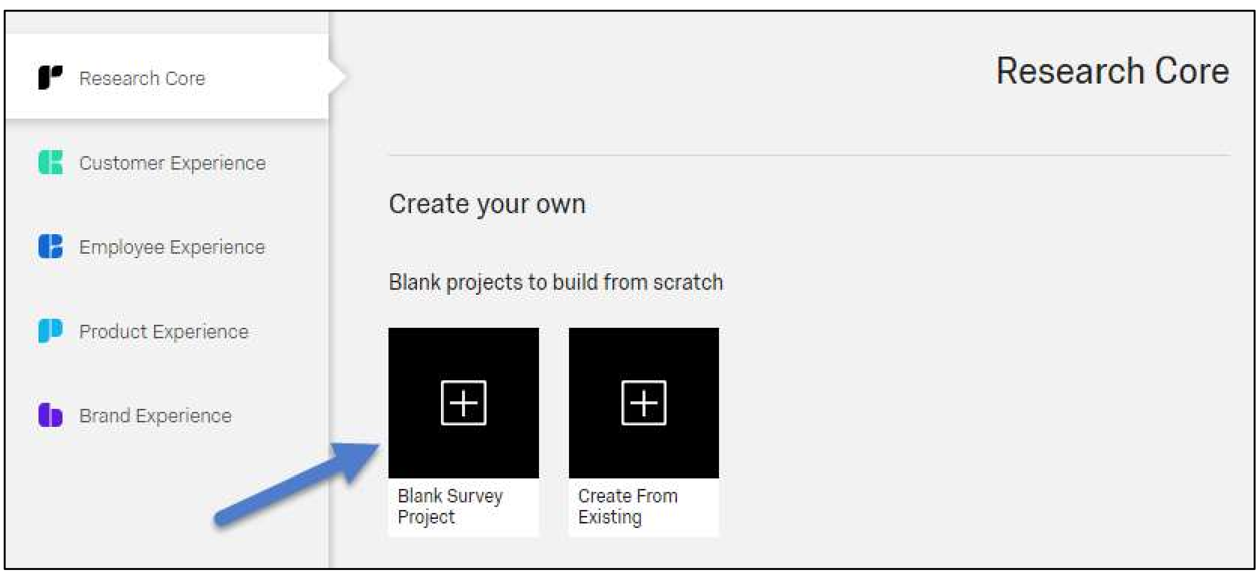
How do I log in?

You can log into Qualtrics at this link: https://susqu.qualtrics.com/ Please use your SU username (the part before '@susqu.edu') and password to login.

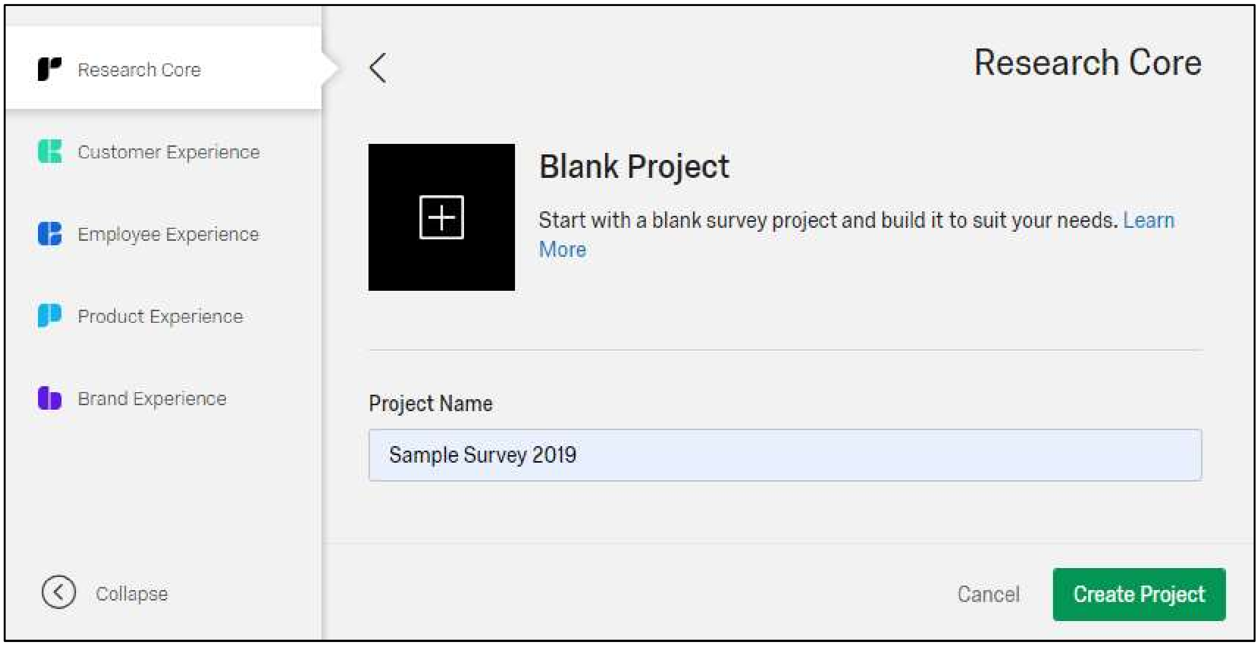
The first time you log in, you'll be asked if you already have an account to transfer. Answer 'no' and Qualtrics will create your new account. Qualtrics will also ask you to agree to the Terms of Service.

How do I create a survey?

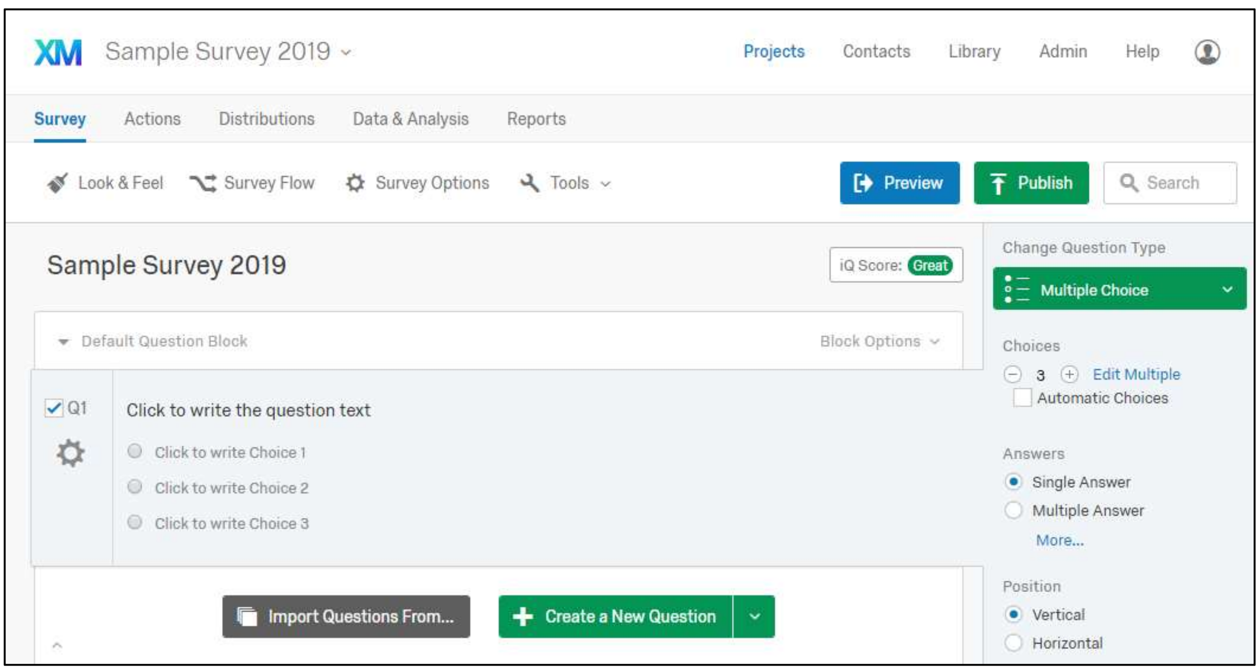
Click the "Create Blank Survey Project" button. Qualtrics uses the word "Project" to refer to a survey.



You'll be asked to name the survey. This name is only seen by you in the Qualtrics system.



Click "Create Project" and you will be taken into the survey editing page.



You can add questions with the green button “Create a New Question.” To change the type of question, use the menu on the right. The shaded button indicates the type of question (Multiple Choice, Text Entry, etc). Click this button to select another question type. The most common types are:

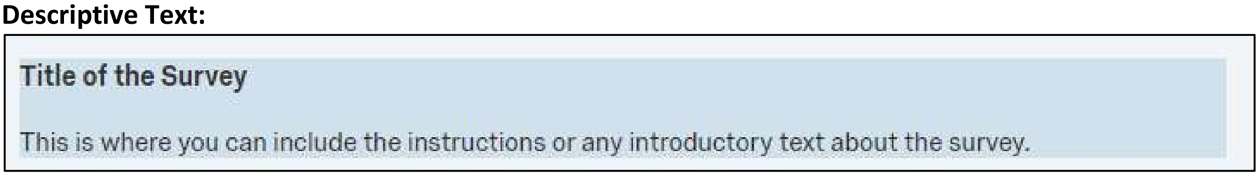
Text Entry:

Text Entry – Form Fields:

Multiple Choice:

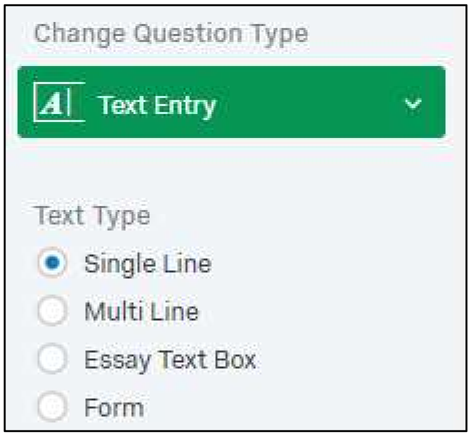
Matrix Table:

Descriptive Text:

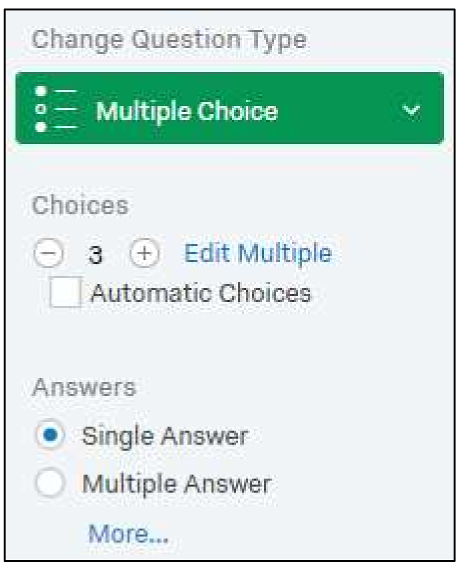


Within each type, there are options, as shown on the menu to the right.

For text entry, you'll be able to select whether to allow one line or text or multiple lines.

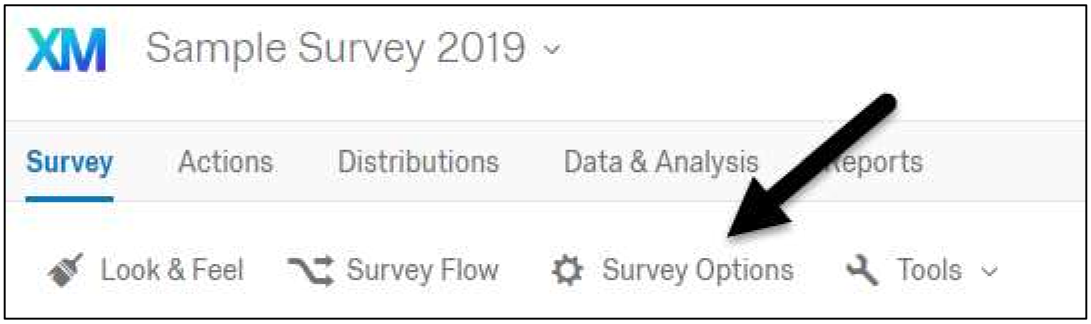


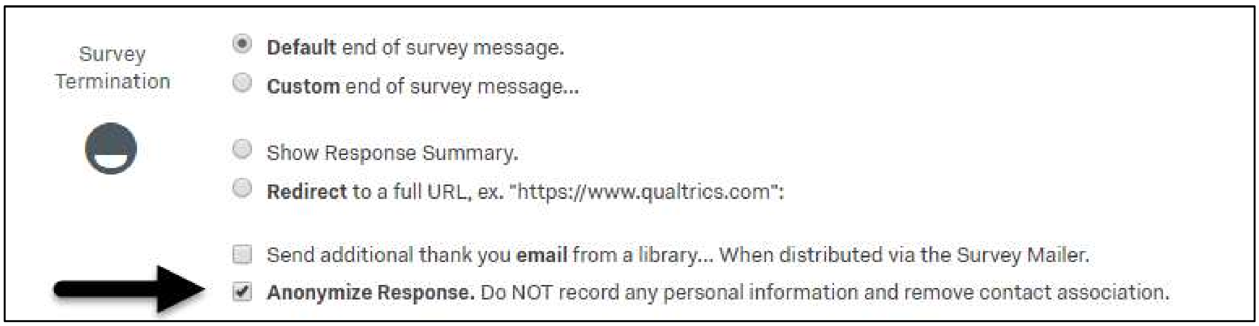
For multiple choice, you can select whether to allow one selection or multiple selection. You can also change the number of options. For matrix tables, you can choose how many statements and ratings are shown.



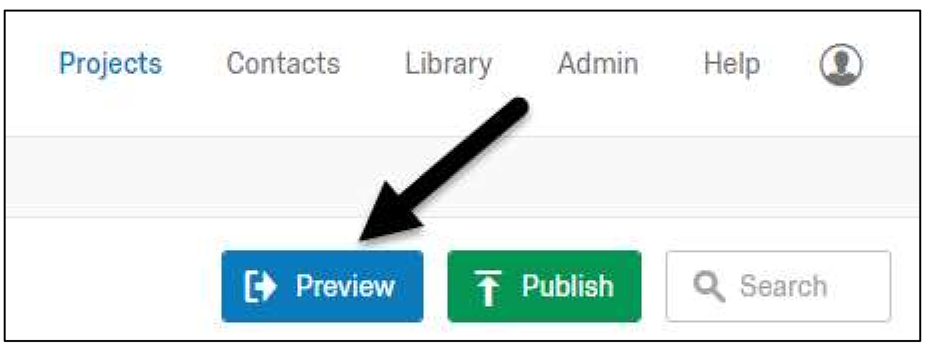
To make a survey question mandatory, check the option on the right "Force Response."

Surveys are **<u>NOT anonymous</u>** by default. To make a survey anonymous, you'll need to change the survey settings. Click "Survey Options" at the top. Then check the option "Anonymize Response."



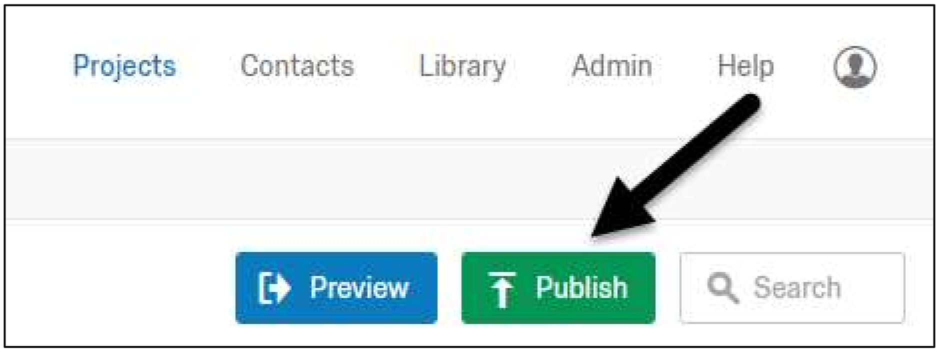


To preview the survey, click the "Preview" button in the upper right.



How do I activate a survey?

When you are finished drafting the survey, click “Publish”.



If you have permission, the survey will be activated. If you’re a staff member or a student, you’ll need to have your survey reviewed and approved either by an administrator or by your faculty research advisor. Select the appropriate person from the list and they will be notified that your survey is waiting for review, approval, and activation. You’ll receive an email once the survey is available.

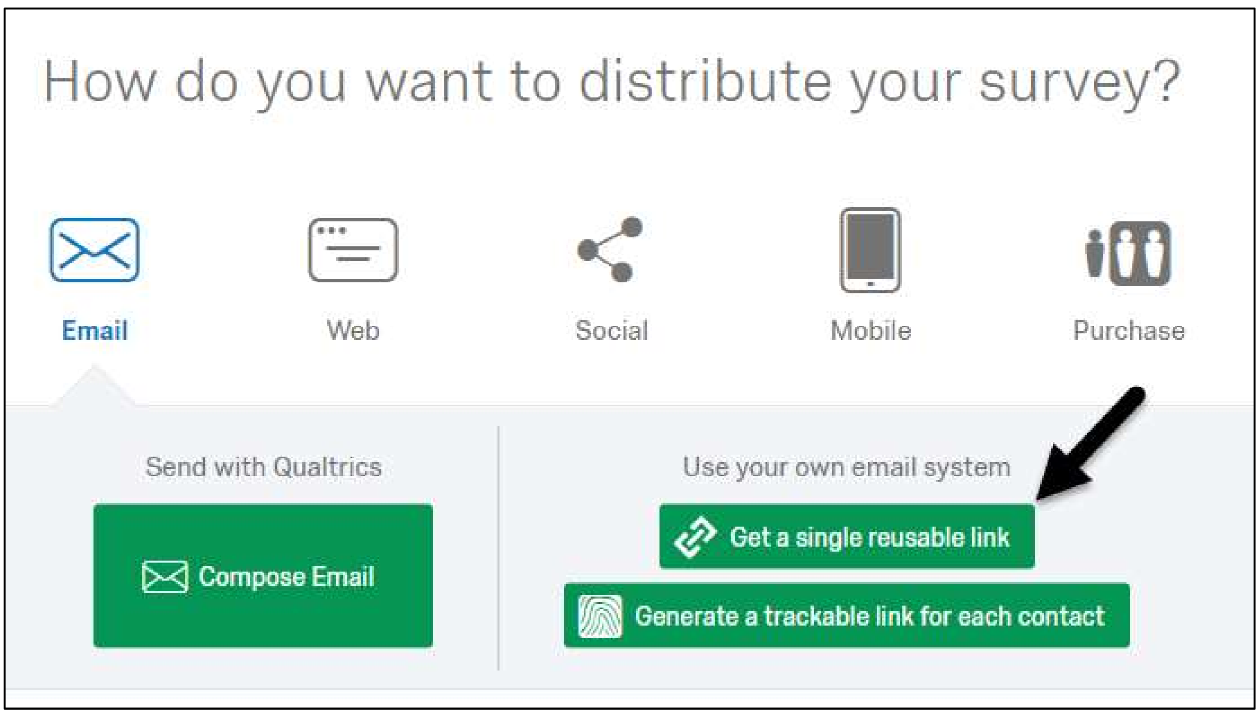
If you or your faculty research advisor has any questions, please contact the current Qualtrics administrator in the Office of Information Technology, Megan McCarty mccartym@susqu.edu phone ext 4521.

How do I send a survey?

There are different options for distributing a survey. A link to the survey can be posted on mySU or sent via email. If you have a contact list, you can send an email via Qualtrics to those email addresses. If you send an email via Qualtrics, you'll be able to send reminders.

To get a link to your survey, select your survey and click on the Distributions tab from the menu at the top of the page.

Then, click "Get a single reusable link". The link will be shown and you can copy it.



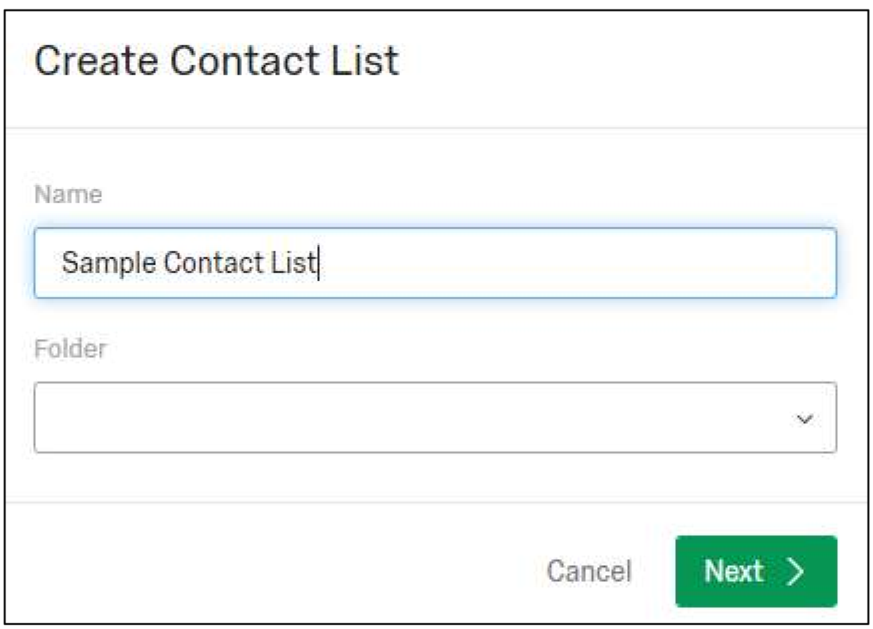
To send an email via Qualtrics, you'll first need to import the contact list. Contact lists need to be in .csv format. The column headers must be FirstName, LastName, and PrimaryEmail in that order.

FirstName	LastName	PrimaryEmail
John	Doe	John_Doe@email.com

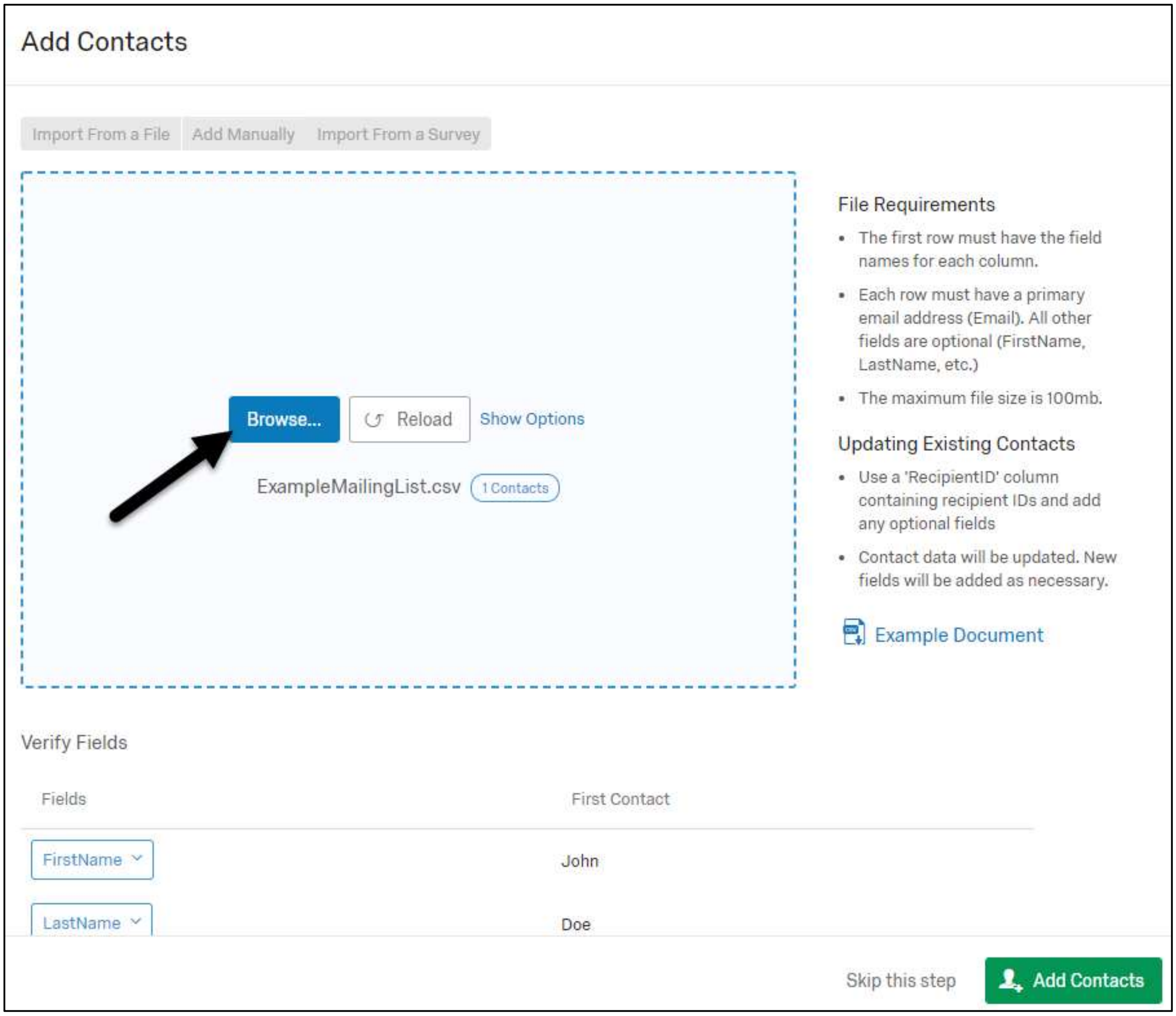
To upload your Contact List, click on the menu in the upper right that says "Contacts."

"Create Contact List":

Name this list so you can distinguish it from other contact lists that you may use in the future:

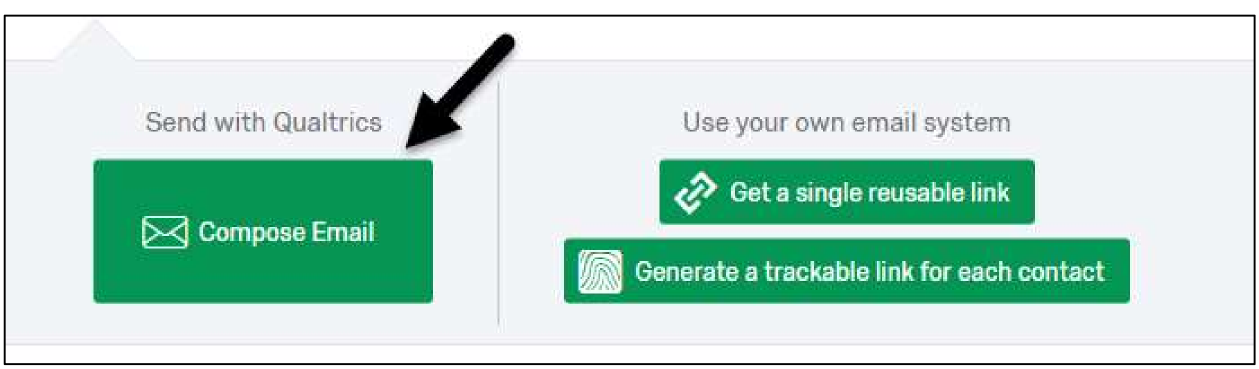


Use the “Browse” button to locate your contact list file.

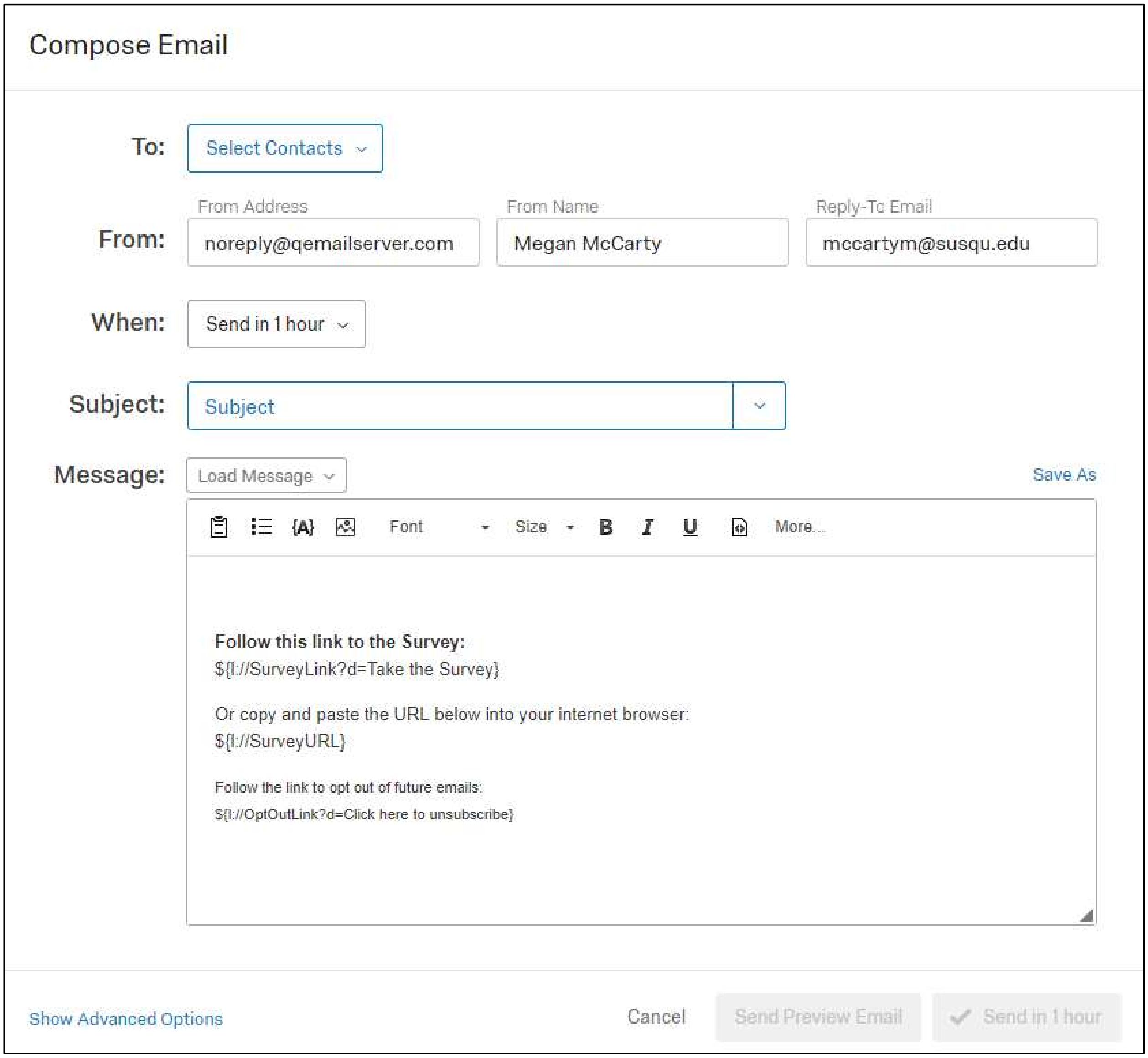


Once you select it, it will show the first few contacts below. Preview this information and click “Add Contacts.”

You can now send the Qualtrics email. To do this, click on “Projects” and select the survey. Then, click “Distributions” and “Compose Email.”



Qualtrics will show the mailer screen where you can define the recipients and write the message that will be sent. Select your contact list, set a time, and enter text for the email subject and message. A link to the survey will be included as shown. Opt-out text will also be included. If you need the survey to be available for more than 60 days, use the Advanced Options to set a longer time range.

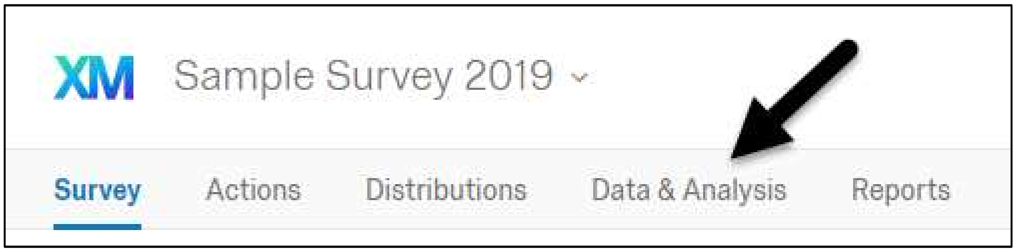


After you have filled in the information, you can use the "Send Preview Email" button to send yourself (or another person) a preview of the message. When you are ready, click "Send" to send the survey.

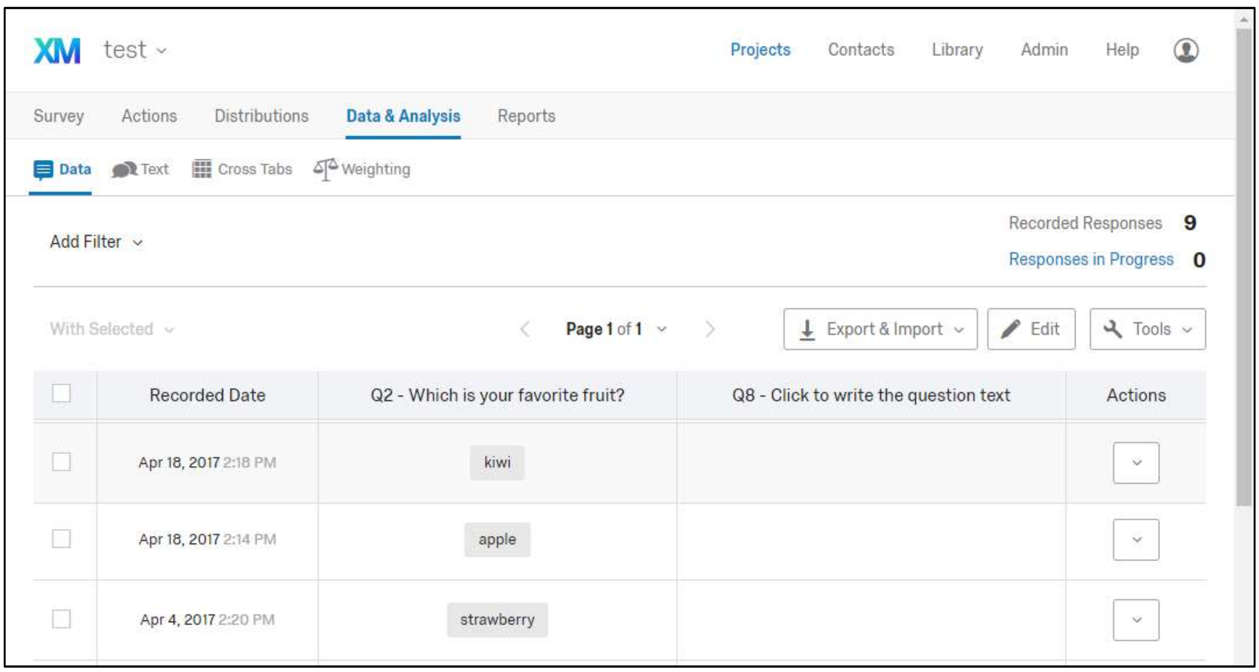
How do I view my survey results?

There are two ways to see the responses. The first shows each response, one at a time. This can be exported into an Excel file. The other way is to see an aggregated report with graphs that can be downloaded in PDF format.

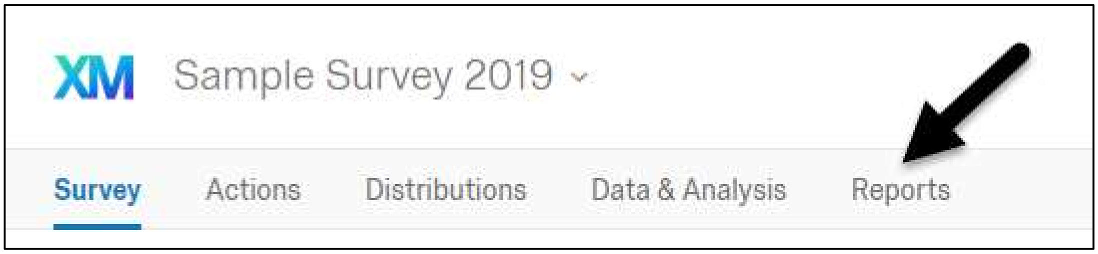
Click on your survey and select the menu “Data & Analysis” to see the individual responses.



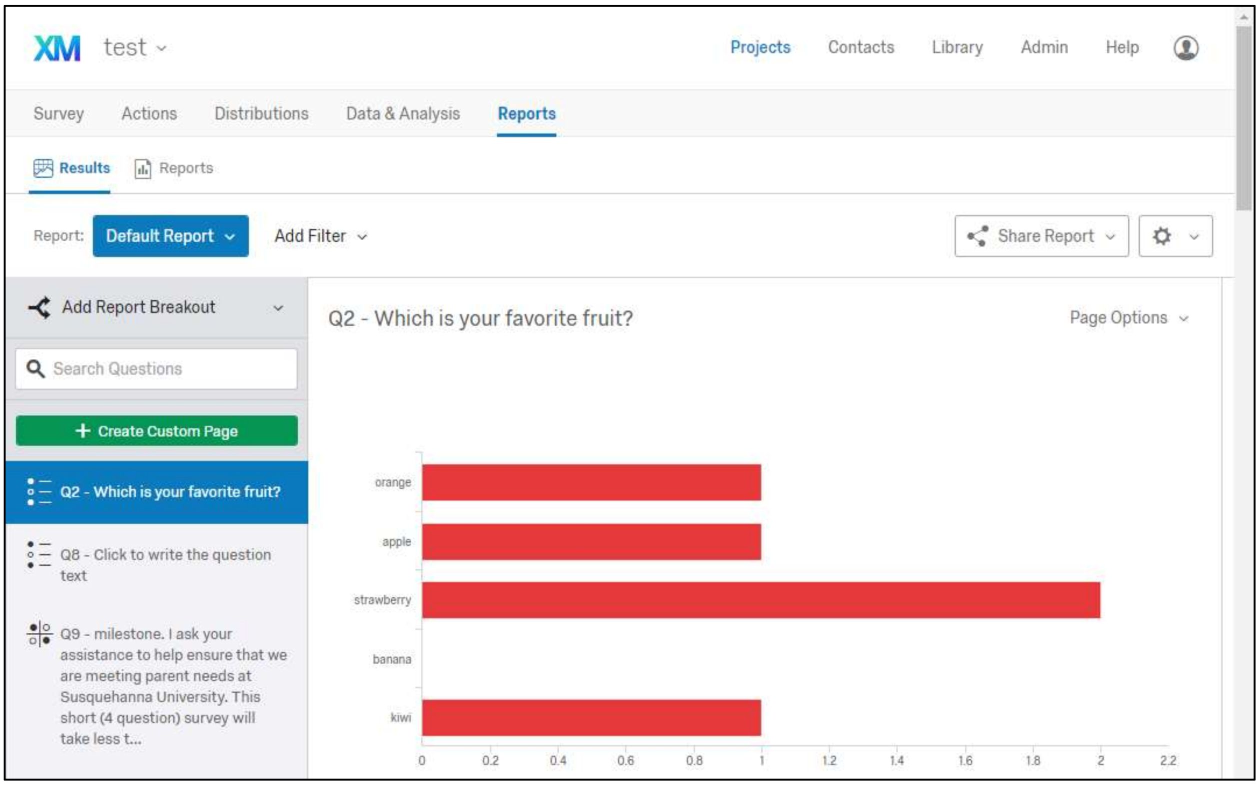
Click the “Export & Import” button to Export the Data in Excel format (csv).



To see the aggregated report, click the “Reports” tab:



Click “Share Report” and “PDF Document” to download a copy of the report in PDF. You can also edit the report layout on this page, if you wish to customize the format.



Other Questions?

If you have any other questions, please contact Megan McCarty in the Office of Information Technology at mccartym@susqu.edu or phone ext 4521.