

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.

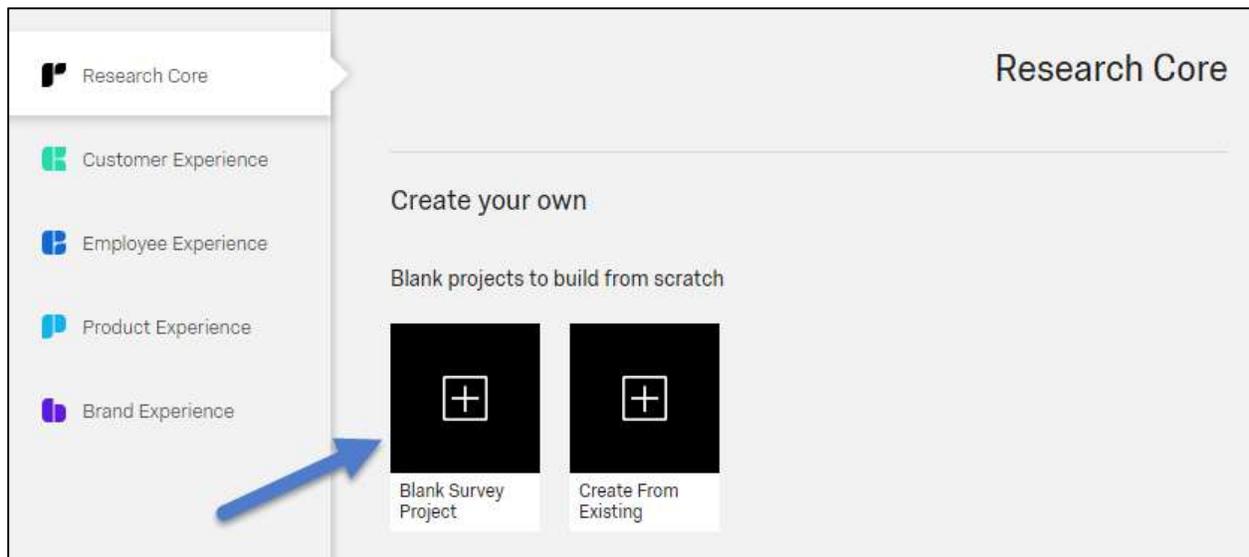
How do I log in?

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.

The screenshot shows the 'Blank Project' creation interface in the Qualtrics Research Core. On the left is a navigation menu with options: Research Core, Customer Experience, Employee Experience, Product Experience, and Brand Experience. The main area features a 'Blank Project' header with a plus icon and the text 'Start with a blank survey project and build it to suit your needs. [Learn More](#)'. Below this is a 'Project Name' input field containing 'Sample Survey 2019'. At the bottom right, there are 'Cancel' and 'Create Project' buttons.

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

The screenshot displays the survey editing page for 'Sample Survey 2019'. The top navigation bar includes 'XM Sample Survey 2019' and links for 'Projects', 'Contacts', 'Library', 'Admin', and 'Help'. Below this is a secondary navigation bar with 'Survey', 'Actions', 'Distributions', 'Data & Analysis', and 'Reports'. A toolbar contains 'Look & Feel', 'Survey Flow', 'Survey Options', 'Tools', 'Preview', 'Publish', and a search box. The main content area shows a 'Default Question Block' with a question text field and three choice fields. On the right, a 'Change Question Type' panel is open, showing 'Multiple Choice' selected. Below this, 'Choices' are set to 3, and 'Answers' are set to 'Single Answer'. At the bottom, there are buttons for 'Import Questions From...' and '+ Create a New Question'.

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:

Click to write the question text

Text Entry – Form Fields:

Click to write the question text

Name

Email Address

Multiple Choice:

Click to write the question text

Choice A

Choice B

Choice C

Matrix Table:

Click to write the question text

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
Choice A	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Choice B	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Choice C	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

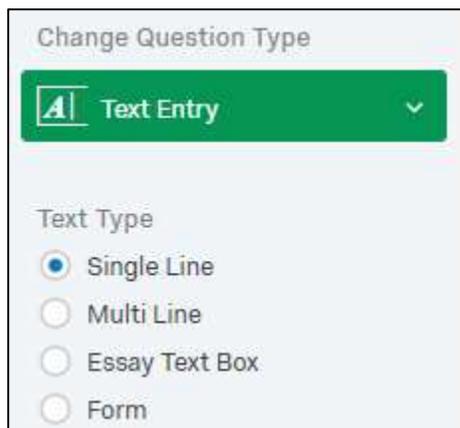
Descriptive Text:

Title of the Survey

This is where you can include the instructions or any introductory text about the survey.

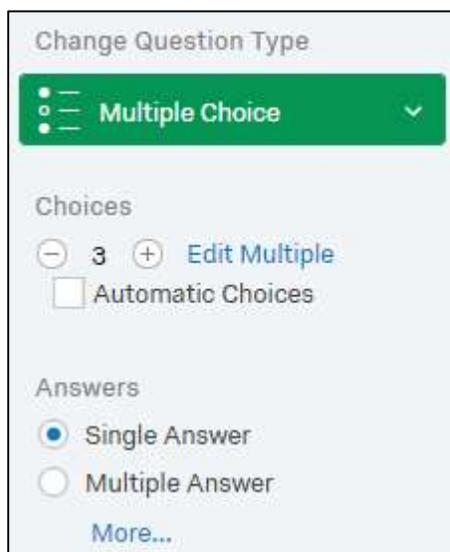
Within each type, there are options, as shown on the menu to the right.

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



The screenshot shows a 'Change Question Type' menu. At the top, 'Text Entry' is selected and highlighted in green. Below it, under the heading 'Text Type', there are four radio button options: 'Single Line' (which is selected), 'Multi Line', 'Essay Text Box', and 'Form'.

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.



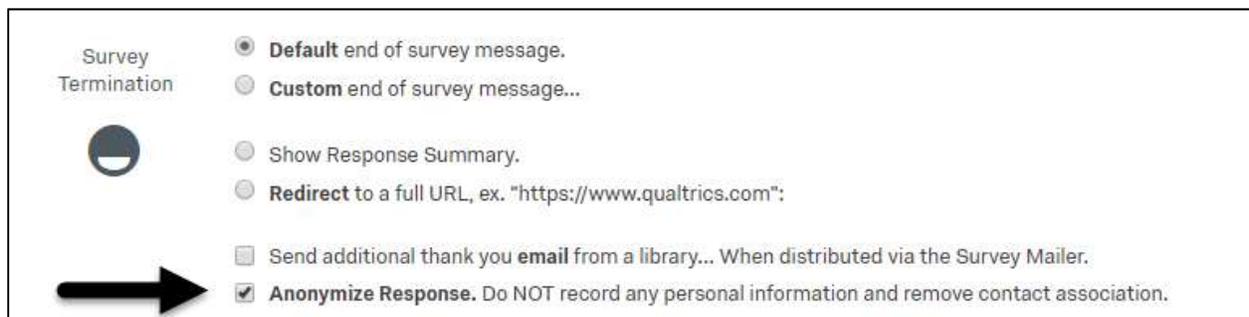
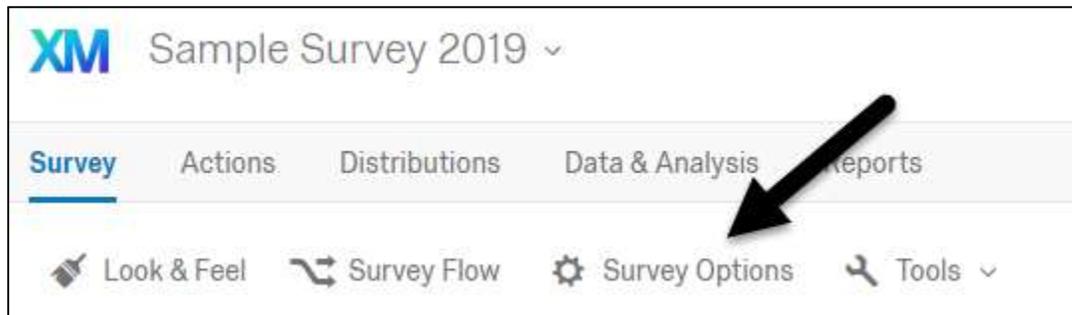
The screenshot shows a 'Change Question Type' menu. At the top, 'Multiple Choice' is selected and highlighted in green. Below it, under the heading 'Choices', there are three radio button options: 'Single Answer' (which is selected), 'Multiple Answer', and 'More...'. There are also controls for the number of choices: a minus sign, the number '3', a plus sign, and the text 'Edit Multiple'. Below that is a checkbox labeled 'Automatic Choices'.

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

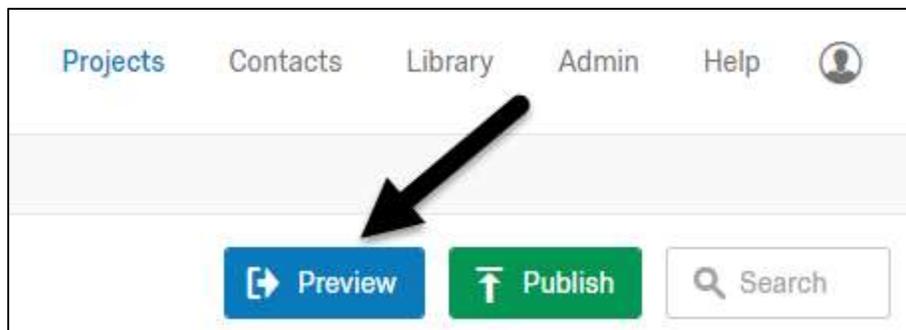


The screenshot shows a 'Validation Options' menu. It contains a single checkbox labeled 'Force Response' with a small dropdown arrow to its right.

Surveys are **NOT anonymous** 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."

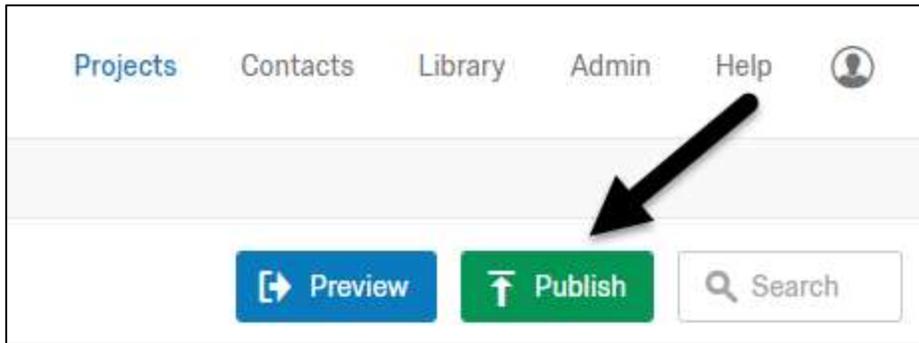


To preview the survey, click the "Preview" button in the upper right.

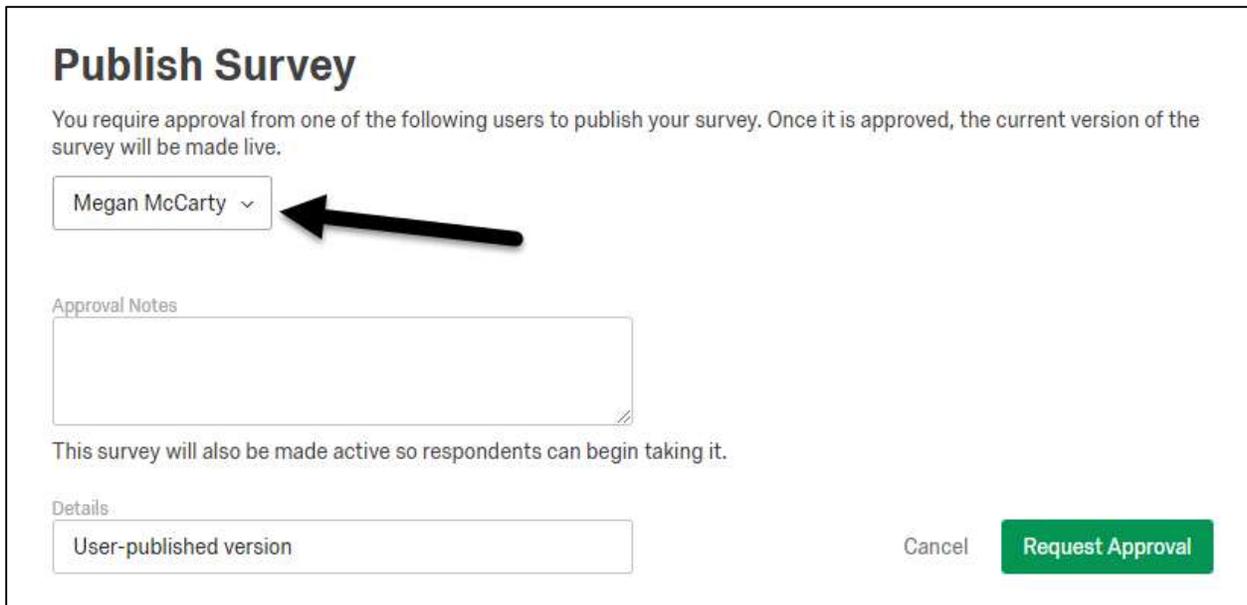


How do I activate a survey?

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.

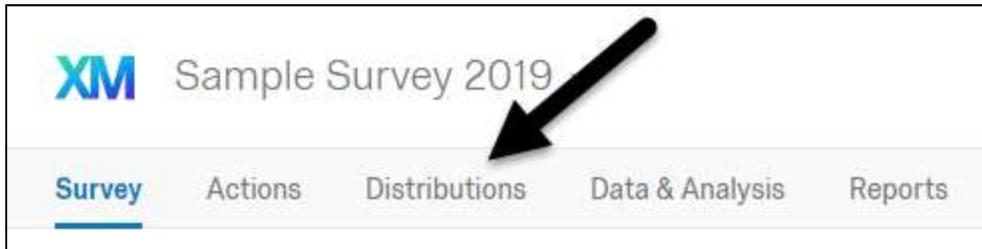
A screenshot of a 'Publish Survey' dialog box. The title is 'Publish Survey'. Below the title, there is a paragraph: 'You require approval from one of the following users to publish your survey. Once it is approved, the current version of the survey will be made live.' Below this text is a dropdown menu showing 'Megan McCarty' with a downward arrow. A large black arrow points from the right towards this dropdown menu. Below the dropdown is a text area labeled 'Approval Notes'. Below the text area is a line of text: 'This survey will also be made active so respondents can begin taking it.' At the bottom left, there is a 'Details' section with a dropdown menu showing 'User-published version'. At the bottom right, there are two buttons: a grey 'Cancel' button and a green 'Request Approval' button.

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.

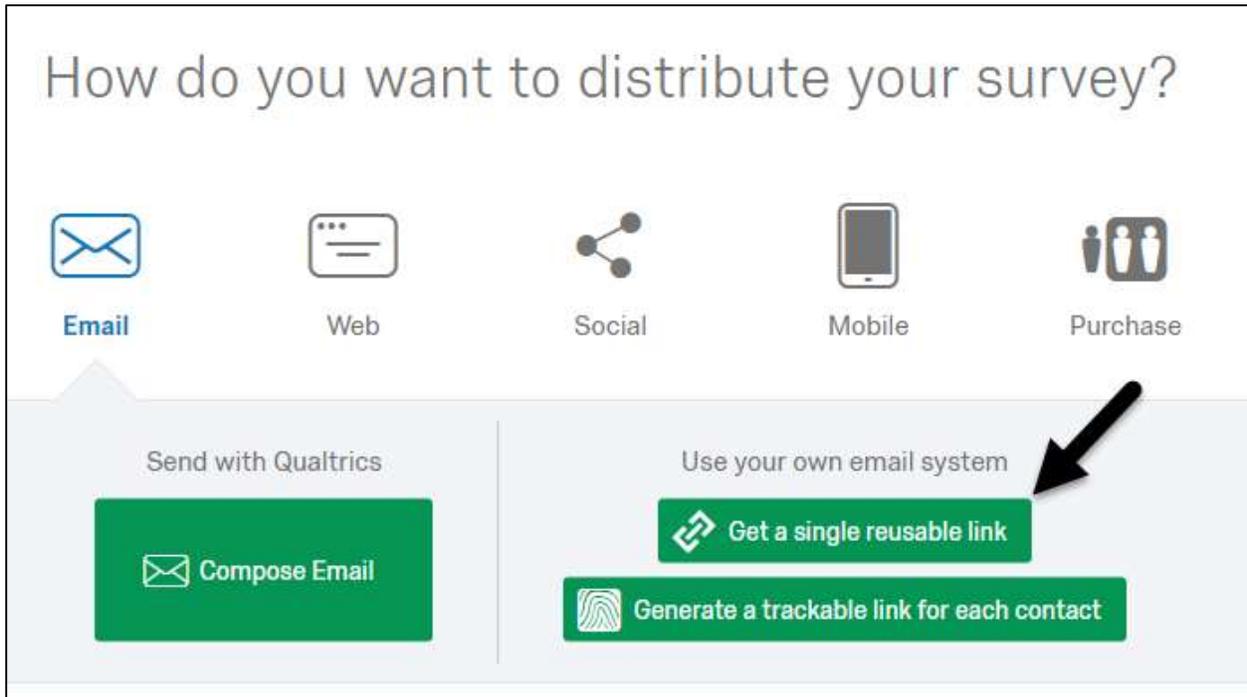
How do I send a survey?

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.



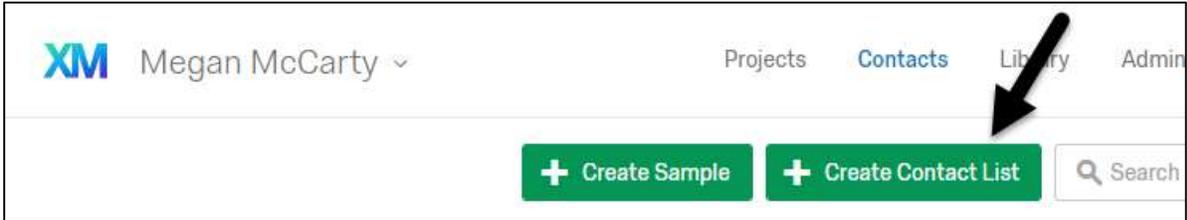
To send an email via Qualtrics, you'll first need to import the contact list. Contact lists need to be in .csv format. The column headers must be FirstName, LastName, and PrimaryEmail in that order.

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:

Create Contact List

Name

Folder

Cancel Next >

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

Add Contacts

Import From a File Add Manually Import From a Survey

Browse... Reload Show Options

ExampleMailingList.csv 1 Contacts

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](#)

Verify Fields

Fields	First Contact
FirstName ▾	John
LastName ▾	Doe

Skip this step Add Contacts

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.”

Send with Qualtrics

Compose Email

Use your own email system

Get a single reusable link

Generate a trackable link for each contact

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.

Compose Email

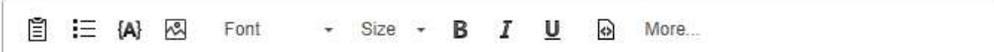
To:

From: From Address: From Name: Reply-To Email:

When:

Subject:

Message: Save As



Follow this link to the Survey:
\${://SurveyLink?d=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?d=Click here to unsubscribe}

[Show Advanced Options](#)

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.

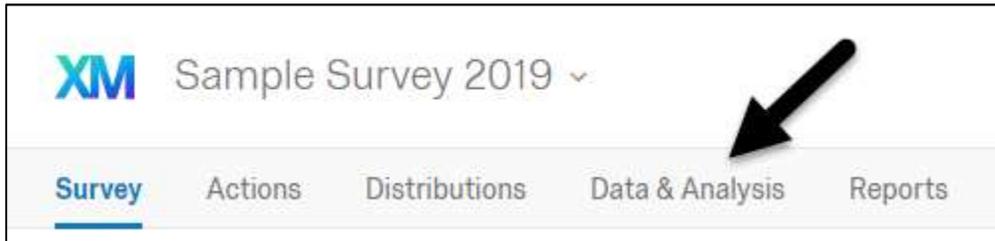


[Hide Advanced Options](#)

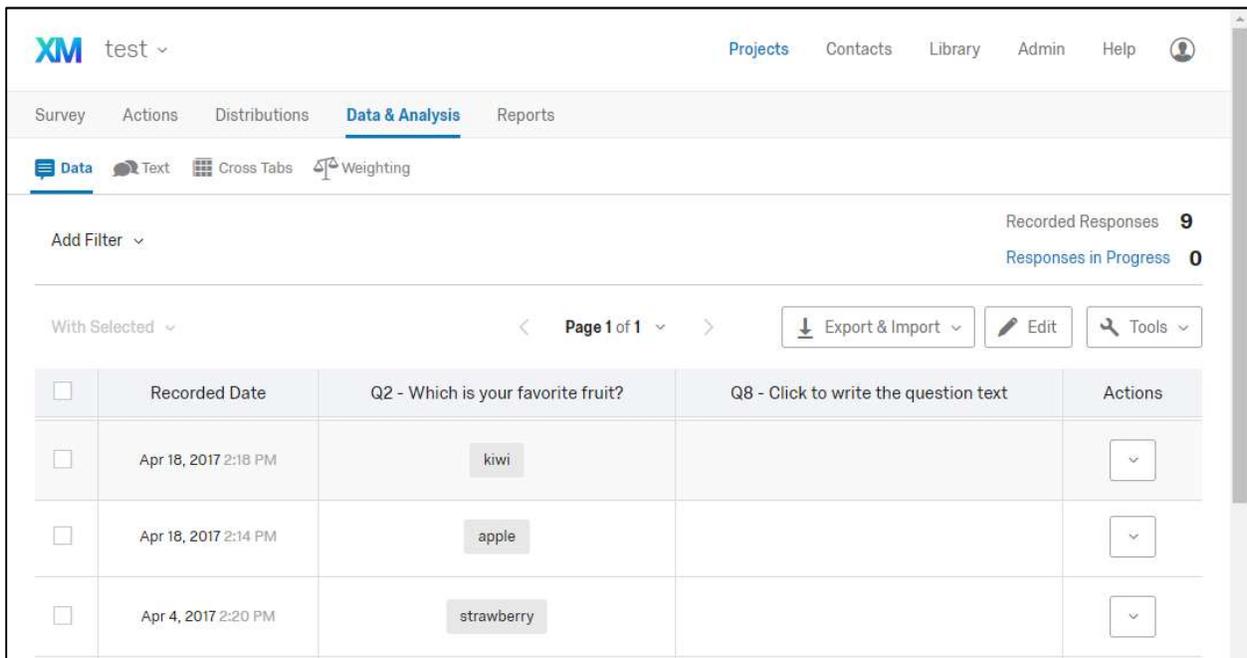
How do I view my survey results?

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.

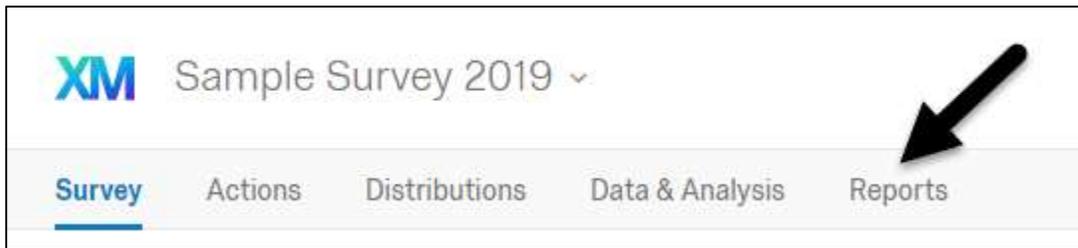


Click the “Export & Import” button to Export the Data in Excel format (csv).

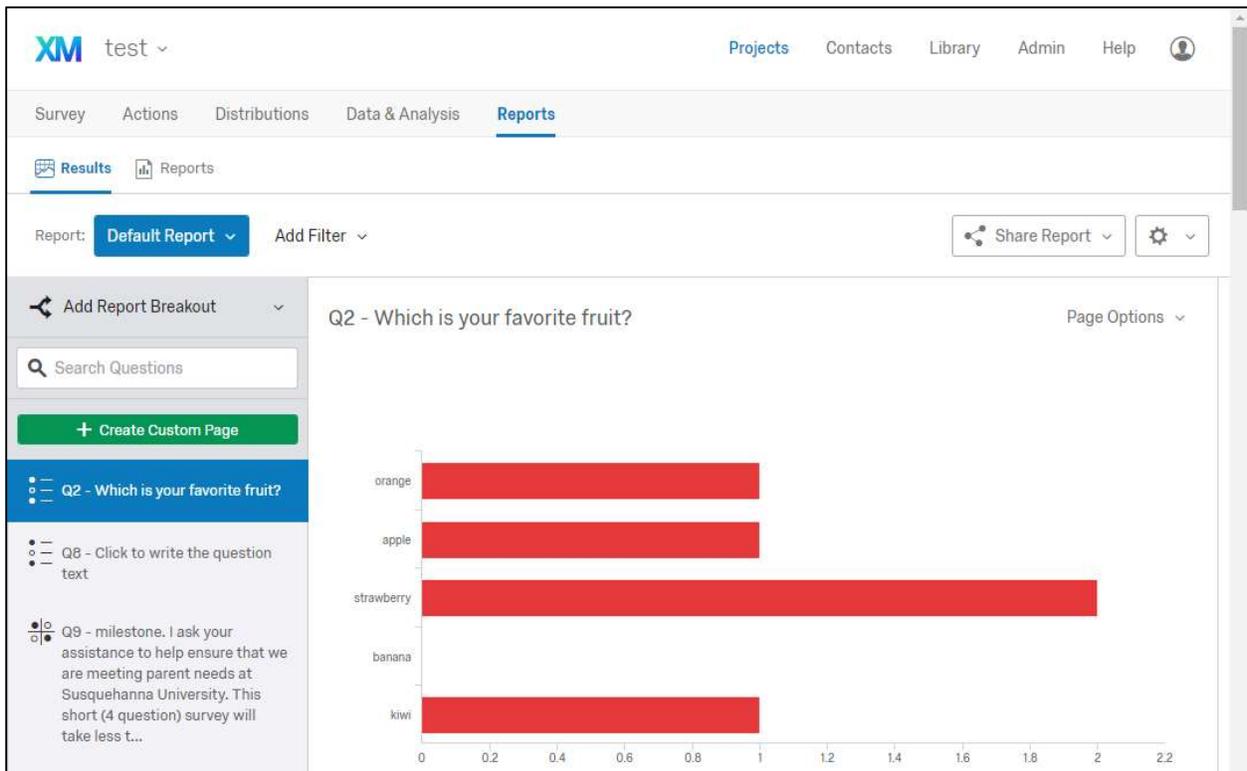
A screenshot of the survey results page. The top navigation bar includes 'XM test' and links for 'Projects', 'Contacts', 'Library', 'Admin', and 'Help'. Below this is a secondary menu with 'Survey', 'Actions', 'Distributions', 'Data & Analysis' (highlighted), and 'Reports'. Under 'Data & Analysis', there are icons for 'Data', 'Text', 'Cross Tabs', and 'Weighting'. The main content area shows 'Add Filter' and 'Recorded Responses 9' / 'Responses in Progress 0'. Below this is a table with columns: 'Recorded Date', 'Q2 - Which is your favorite fruit?', 'Q8 - Click to write the question text', and 'Actions'. The table contains three rows of data. Above the table is a 'With Selected' dropdown, a 'Page 1 of 1' indicator, and buttons for 'Export & Import', 'Edit', and 'Tools'.

<input type="checkbox"/>	Recorded Date	Q2 - Which is your favorite fruit?	Q8 - Click to write the question text	Actions
<input type="checkbox"/>	Apr 18, 2017 2:18 PM	kiwi		<input type="button" value="v"/>
<input type="checkbox"/>	Apr 18, 2017 2:14 PM	apple		<input type="button" value="v"/>
<input type="checkbox"/>	Apr 4, 2017 2:20 PM	strawberry		<input type="button" value="v"/>

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.