Getting Started with Qualtrics

Qualtrics Guidelines

1. The Office of Institutional Effectiveness provides the following guidelines when sending surveys. If you do not follow these guidelines, your access to Qualtrics may be revoked.

2. Contact the Office of Institutional Effectiveness before sending a survey to Potsdam students, faculty, or staff. That office maintains a list of surveys that are being distributed to coordinate sending times and help prevent your audience from being overwhelmed. You will also need to complete an Appendix G for any survey being sent via email to students, faculty, or staff. More information on Appendix G can be found here.

3. The Office of Institutional Effectiveness also provides consultation regarding survey design and can give advice to help maximize response rates.

4. Qualtrics may not be used to collect any type of secure or regulated data, such as SSNs, credit card numbers or any other data element that is categorized as Personally Identifiable Information (PII).

5. Using Qualtrics for personal, commercial or other non-academic endeavors is not allowed. Use of Qualtrics is bound by Qualtrics’ Acceptable Use Statement and all SUNY Potsdam Information Technology Policies.

Log into Qualtrics

1. Go to: www.qualtrics.com
2. Click on the word Login near the top right corner.
3. Log in with your SUNY Potsdam campus email and password that was given to you.

Start Creating a Survey or Form

1. Click the green Create Project button, located near the upper right corner, to start creating a new survey, questionnaire or form.

2. Under the Research Core options select 'Blank Survey Project'. You will then be asked to enter a project name. Once you have done so click on 'Create Project'.
Look and Feel
The way your survey looks can determine how well it performs. The good news is that Qualtrics gives you the ability to customize the appearance of your survey in many different ways. Whether you use a default SUNY Potsdam theme or you choose to individually customize specific survey elements yourself, Qualtrics gives you the ability to build visually appealing surveys like no other platform.

Also, setting things such as your font size and color in the look and feel section will set the overall look for all questions thus avoiding the need to edit question properties individually.

To access these customization options, go to the **Look & Feel** menu in the Survey tab.

![Survey Tab with Look & Feel Menu](image)

Some of the options available in the look and feel section include:

- **Add a Progress Bar**: Show respondents how far along they are in the survey.
- **Specify Page Transition**: Select the desired transition from one page to the next.
- **Specify Questions per Page**: Set a default number of questions to show on each page of the survey.
- **Set Question Highlighting**: Specify whether questions should highlight when respondents click on them.
- **Enable Question Separators**: Add a visual separator between each question in the survey.
- **Change Fonts**: Change the default fonts for your survey.
- **Change Colors**: Change the default colors for your survey.

Create Questions
Once you’ve followed the steps above to start creating a survey, you can begin adding questions to your survey.

1. Click the green **Create a New Question** button.
   - A multiple choice question will be created by default.
   - If you want to change the question type, click the green “Multiple Choice” button, located near the top of the right column, and select a different question type.

2. Create your survey question and answer(s) by typing over the sample text that appears.
Format Your Questions

Once you start creating questions, you may want to refine the details of your questions. For example, multiple choice questions allow 4 options (a, b, c, and d) by default. But what if you want more than 4, or less?

When you click to highlight a survey question you've created, you will see options on the right column (see picture at right). You can change the question type from Multiple Choice to another type, add and remove answer choices, make a question a required question, and more.

- **Change Question Type**: Change the type of question being used (Multiple Choice is the default question type) by clicking on the big green button (it will say "Multiple Choice" until you change it) and choosing from the different options shown.
- **Choices**: Click the plus or minus buttons (just below the green button) to change the number of multiple choice "answers" that will appear in your question.
- **Answers Options**: Allows you to choose between Single Answer, Multiple Answer, Drop-down List, Select Box and more.
- **Position**: Allows you to choose between a Vertical, Horizontal, or Column layout.
- **Validation Options**: Allows you to enable Force Response, which requires participants to respond to the question before moving to the next page. Another choice is Request Response, which notifies the participant when they do not answer a question, letting them choose to move on or to respond.

**Question-Specific Options**: You will notice that each question type has different formatting options in the right column. These options vary depending on the type of question (for example, Multiple Choice or Text Entry) you choose.

Skip or Hide a Question ("Logic")

The "logic" features in Qualtrics enable you to show or not show certain questions based on an earlier answer, or skip the user to the end of the survey based upon their answer to a certain question.

**Display Logic**

This enables you to make a question visible or not visible under certain conditions. Click on the question to highlight it, then click the "gear" icon to the left of the question and choose "Add Display Logic." Next, use the drop-down menus provided to build your question conditions. Press "Save" when you are finished.

In the example below, the question will only appear to survey-takers who answered "Yes" to the earlier question "Were you helped by an Advisor?" (Otherwise, it will not display.)
Skip Logic
If you want to skip the survey-taker to a later question, section ("Block") or to the end of the survey, choose “Skip Logic” from the gear icon drop-down menu. Use the options provided to build your logic, then press “Done.”

In the example above, if the survey-taker answers “No” to the question “Are you a SUNY Potsdam student?” they will be taken to the end of the survey.

Preview / Test Your Survey
To see how your survey will look to a user, just click on the blue “Preview Survey” button near the top at any time. You can even take the survey and see how it’s working.

IMPORTANT: If you preview the survey you will want to exclude any test submissions from your data. To do this simply click on the Data and Analysis link for your survey. Then click on Tools > Delete Data > Survey Previews. A confirmation message will appear, click on the appropriate boxes and select delete to proceed with the removal of preview submission data.
Distribute Your Survey

Once you have created your survey, it’s time to send it out to people so they can complete it. Click on the word Distributions, located near the top left corner, then click the green “Distribute Survey” button.

There are three options for distributing a survey. **The recommended option is using the single reusable link.** If you use the Compose email option it is critical that you read the information on the next two pages to make sure your distribution and emails settings are correct.

- **Get a Single Reusable Link** -- This option is recommended if you do not need to track how each respondent answered each question, who completed the survey and who didn’t. When you choose this option, use the link provided (copy/paste this link into an email message) and send out your survey using your regular Potsdam campus email. (Or, you can put this link onto a department website if you prefer.)

- **Compose Email** -- Choose this option if you have a Panel of survey-takers already created and you want to send the survey out to them. (A Panel is a group of specific individuals you expect will take the survey, such as a group of students enrolled in a given course.)

- **Generate a Trackable Link for Each Contact** -- This option is to be used with a third-party email system such as SUNY Potsdam’s EMMA and is for users who **DO** need to track how each survey-taker answered each question, and/or whether they completed the survey. You’ll need to provide the email addresses of each person you anticipate will be taking the survey if you choose this option.
Distributing your survey via the ‘Compose Email’ distribution method

Before composing and sending emails you will need to have uploaded your ‘contact list’ for the survey you wish to send emails in regards to. For more information on how to upload contacts please visit this training page.

Once you have added your contacts you are now ready to set up and send your survey emails.

1. Begin by clicking on the ‘Distributions’ link in your survey.

2. Next click on the “Emails” link located on the left hand side and then click on ‘Compose Email’.

3. The compose email window will now appear. At this point it is critical that you click on ‘Show Advanced Options’ to first set up your email appropriately. Doing this first will help ensure no emails are mistakenly sent with the wrong settings.
Once you click on the ‘Show Advanced Options’ link two new options will appear at the bottom of the window asking you to select the ‘Link Type’ and the ‘Link Expiration’. **For a survey to be truly anonymous you must select ‘Anonymous’ in the link type dropdown.** Individual links allow each recipient to complete the survey once while multiple completes lets recipients complete the survey or form more than once. Both of those options are trackable and not anonymous.

Link Expiration selection allow you to determine how long the link being emailed will be active. It is important to note that this is separate from the overall survey expiration date that you set when creating the actual survey/form.

4. Once you have selected your advanced options you may scroll back up and begin working on your actual email. Remember to select the appropriate contact list, enter the ‘From’ name and subject line and to compose your message.

5. Once you have confirmed you have your email and settings correct you may either send a preview email or select to send the actual email. **We strongly encourage you to send the preview email and review for any errors or issues before actually sending a mass email to your intended audience.**
View the Results

The “Data & Analysis” Tab

Once you have distributed your survey or form and people have taken it, it’s time to view the results. Click “Data & Analysis” near the upper left. The picture below is intended as a guide to interpreting the data on this tab.

Other things to know about the “Data & Analysis” tab

- Survey results that are incomplete (i.e. the survey-taker did not finish taking the survey) will not show up in on this tab. If you want to see them, click “Responses in Progress” on the upper right.

- If you want to include the incomplete responses in your data analysis, first go to “Responses in Progress” on the upper right corner and use the drop-down menu to close the incomplete responses. They will then be treated as completed responses and included in the data displayed.

- One way to see how many people answered “yes” to question 1, for example, is to create a Filter based on that question, then view how many results come up. Just click “Add Filter,” specify the question you want to use to narrow down your data, and use the drop-down menus to indicate the specifics of what you want. Then scroll down to the bottom of the page to see how many results match your filter criteria.
The “Reports” Tab

Once you’ve followed the steps at the beginning of this handout to open up the project you want and clicked the word Reports near the top (see picture at right), it’s time to look at your aggregate (as a whole) results. This is also where you can create printable reports and add colorful and graphs.

- Click one of the “Visualization” options in the right column to add a bar graph, pie chart, etc.
- Click on the questions on the left column, or press “Next Page,” to toggle through the questions of your survey.
- To get a .pdf, Word, or Excel-friendly version of the report, click “Report Options”
- Click “Printed Reports” near the upper left to get more report options

For more information about Qualtrics Reports, go to:

https://www.qualtrics.com/support/survey-platform/reports-survey-platform/reports-overview/

The “Projects” Section

Once you have created your first survey or project Qualtrics will look a bit different when you log in. Now when you log into Qualtrics, the “Projects” section will appear. (You can also get to it by clicking the words “Projects” in the upper left corner when you’re on any other Qualtrics screen.) The Projects area is your home base, with a list of all the surveys you have created, plus any surveys that have been shared with you. You can also view how many people have taken each survey, whether it is active, and more.

Click on the name of any survey listed to start working with it.
Editing your survey after it is active

Changing, deleting, or adding questions to a survey after it is active is not recommended as it may lead to inconsistency in your data and reports. It is however understandable that from time to time small edits such as fixing typos or grammar mistakes may be necessary. To edit a survey you will want to follow these steps.

1. Log in to Qualtrics and click on the project you need to enter.

2. Once the project/survey opens, click on the question for which you need to edit the text in.

3. After you have made all the necessary text corrections or changes you will need to click on the green ‘Publish’ button.

4. You will then be prompted to enter a description for the ‘new’ version and will need to click on ‘Publish’ again.

5. Your edited survey is now live.

For More Information about Qualtrics....

The Qualtrics website includes comprehensive and easy-to-follow help documentation. Tutorials, webinars and detailed directions are available via Qualtrics’ extensive online resource, "Qualtrics University." (www.qualtrics.com/university). You may also contact the Office of Institutional Effectiveness with Qualtrics related questions and feedback.