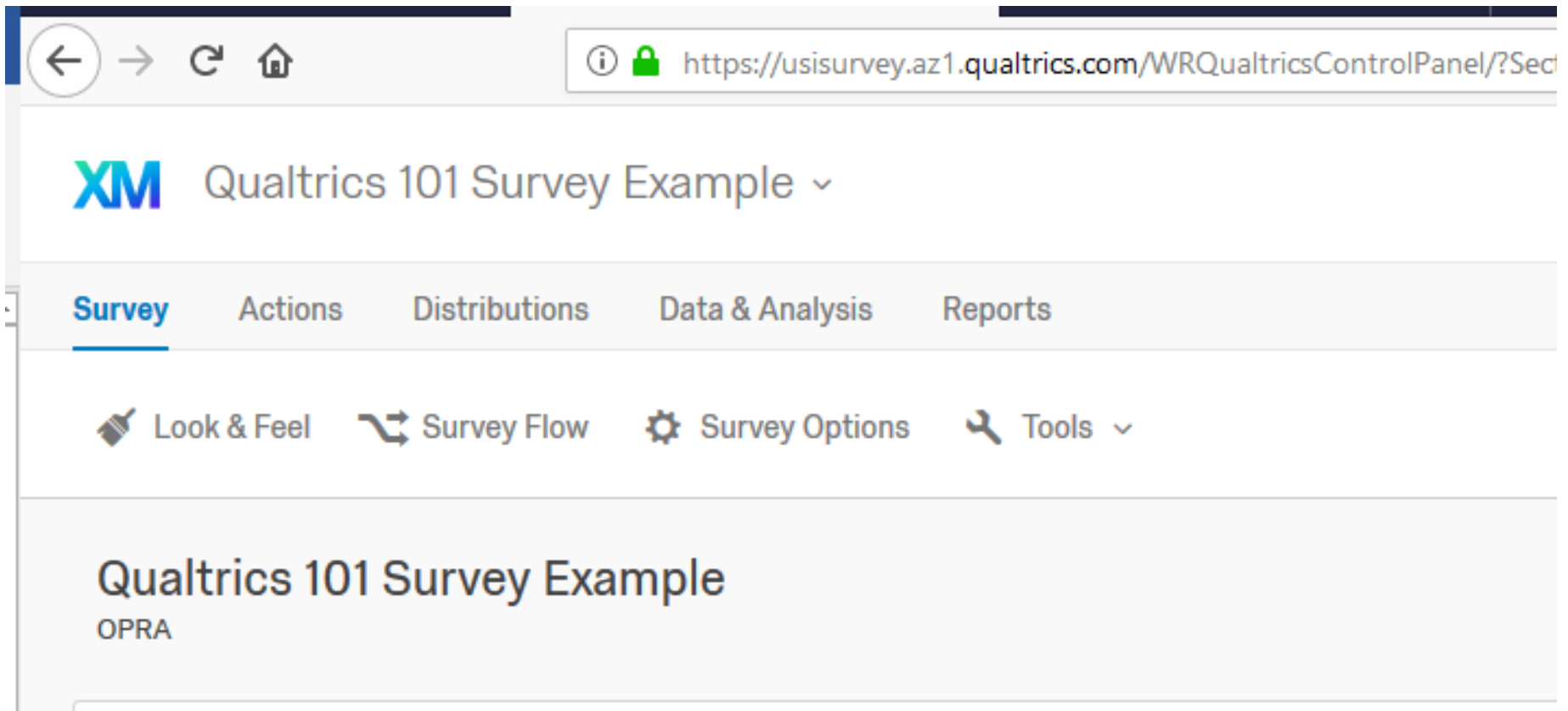# Qualtrics 101 at USI

Qualtrics Option Tabs – Survey Options, Tools, Distribution and Data & Analysis

Qualtrics 101 at USI
Survey Options Tab - Survey Experience – Default Settings

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: English (US) ⌄ The language the survey is written in.

Survey Title: Online Survey Software | Qualtri(This text will appear in the browser as the window or tab title.

Meta Description: Qualtrics sophisticated online su Search engines and social media services use this description.

Things to change:

1. Check the "Back Button"
2. Uncheck "Save and Continue"
3. Change the Survey Title to your survey title
4. Delete the text in the Meta Description

Qualtrics 101 at USI

Survey Options Tab

Survey Experience – Revised Settings

Qualtrics 101 at USI
Survey Options Tab - Survey Protection – Default Settings

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 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.

Things to change:

Nothing – generally these settings are fine for most surveys unless you want to set up a survey expiration date.

Qualtrics 101 at USI
Survey Options Tab - Survey Termination – Default Settings

Survey Termination

◉ **Default** end of survey message.
○ **Custom** end of survey message...

○ Show Response Summary.
○ **Redirect** to a full URL, ex. "https://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 contact association (not recommended).

Default end of survey message

UNIVERSITY OF
SOUTHERN INDIANA®

We thank you for your time spent taking this survey.
Your response has been recorded.

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Survey Options Tab - Survey Termination – Optional Setting Changes

1. The Default End of Survey Message is fine, but you can customize it and save your Custom End of Survey Message in your message library for future use.

2. Show Response Summary – selecting this option will allow a respondent to download a PDF of their responses from the "Default End Survey Message" – but it is not an option if you choose to use a Custom End Message.

3. Anonymize Response – If you need your survey truly anonymous, then select this option. Most surveys are not anonymous, they are confidential. Anonymous means that you have NO WAY to connect the data collected to the individual who provided it, including IP address, location, email, etc.

Qualtrics 101 at USI

Survey Options Tab - Inactive Surveys – Default Settings
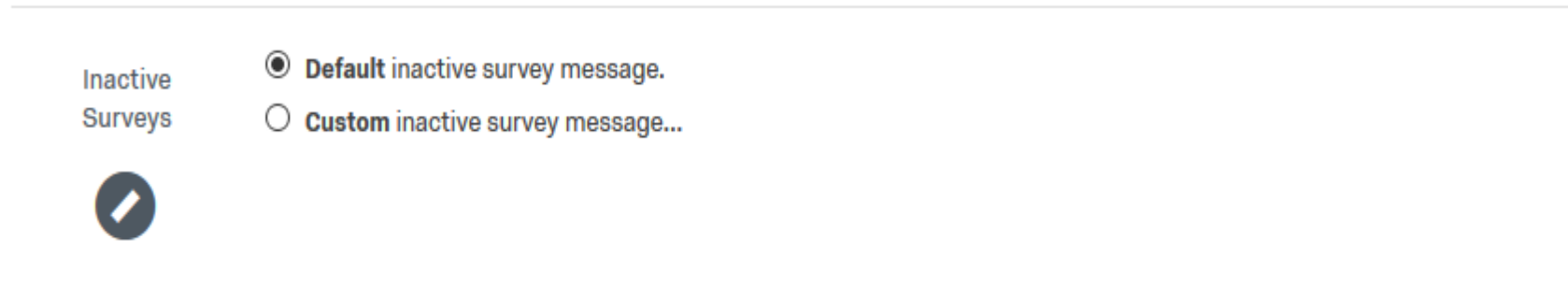
Inactive Surveys – Optional Setting Changes

The Default Inactive Survey Message is fine, but you can customize it and save your Custom End Inactive Survey Message in your message library for future use.

Qualtrics 101 at USI
Survey Options Tab - Partial Completions – Default Settings

Partial Completions – Optional Setting Changes

Change it from 1 week to 1 year to keep people from getting locked out. This can happen if they open the link on their phone, then try to go back and do it again on a computer or wait too long to revisit it.

Qualtrics 101 at USI
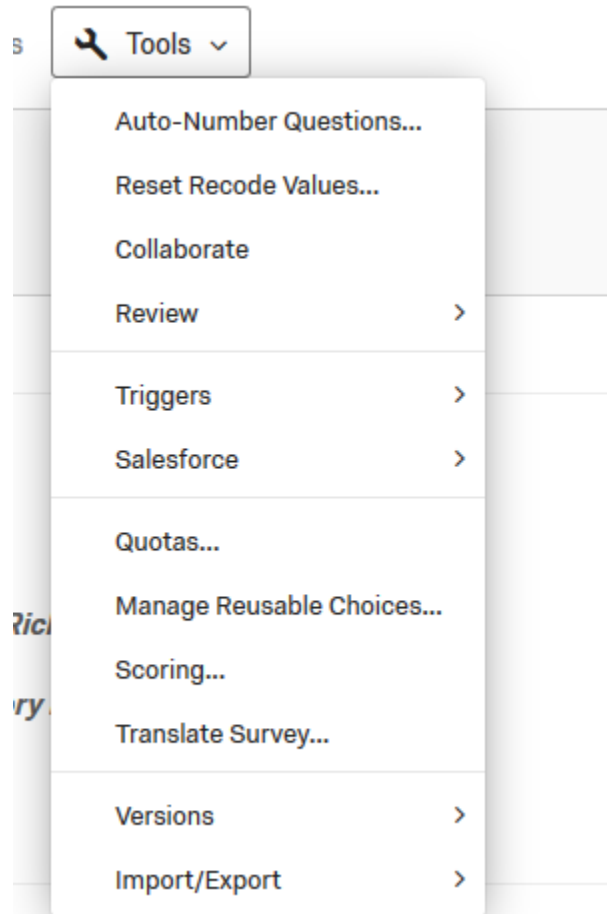
Tools Tab

Qualtrics 101 at USI

Tools Tab - **Auto-Number Questions**

Auto-Number Questions – Sequential Numbering will re-number your questions for you. It does NOT affect any skips or display logic (i.e. it fixes those too). *Best to run this before you start testing your survey.*

Qualtrics 101 at USI

Tools Tab - Collaborate

Collaborate on Project: Qualtrics 101 Survey Example

User	Edit	View Reports	Activate/Deactivate	Copy	Distribute
Belle Cowden	☐ Details	☑ Details	☐	☐	☐
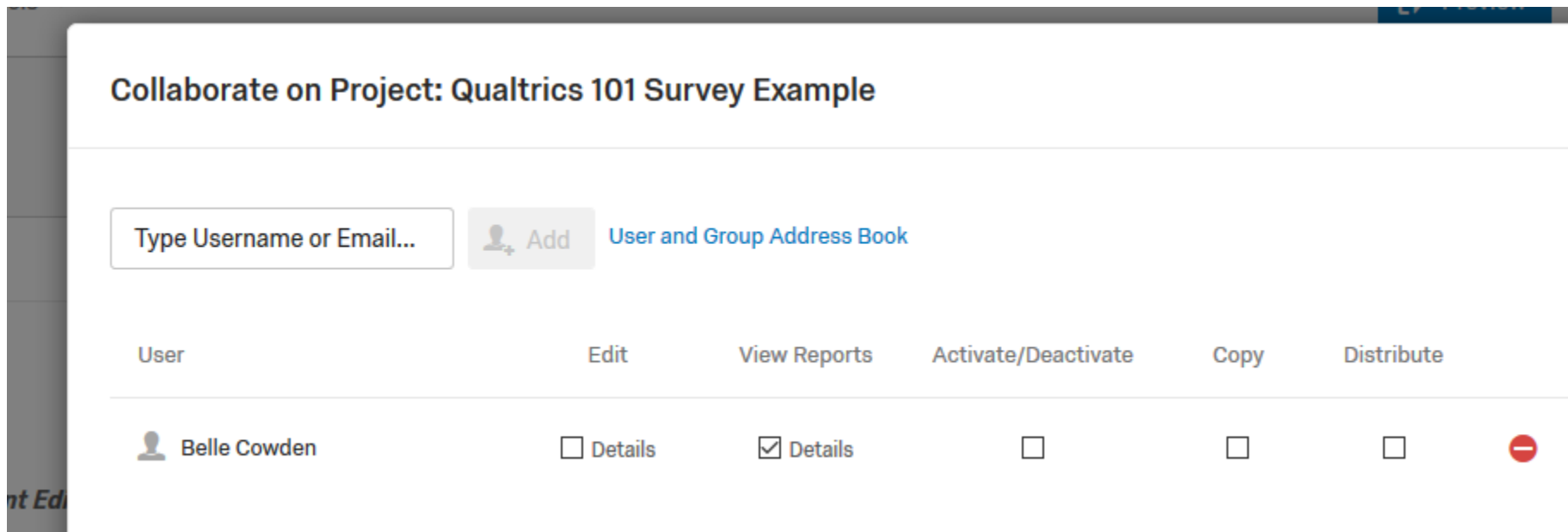
You can share access to a project and set permissions with others who have USI Qualtrics licenses.

Qualtrics 101 at USI

Tools Tab - Review
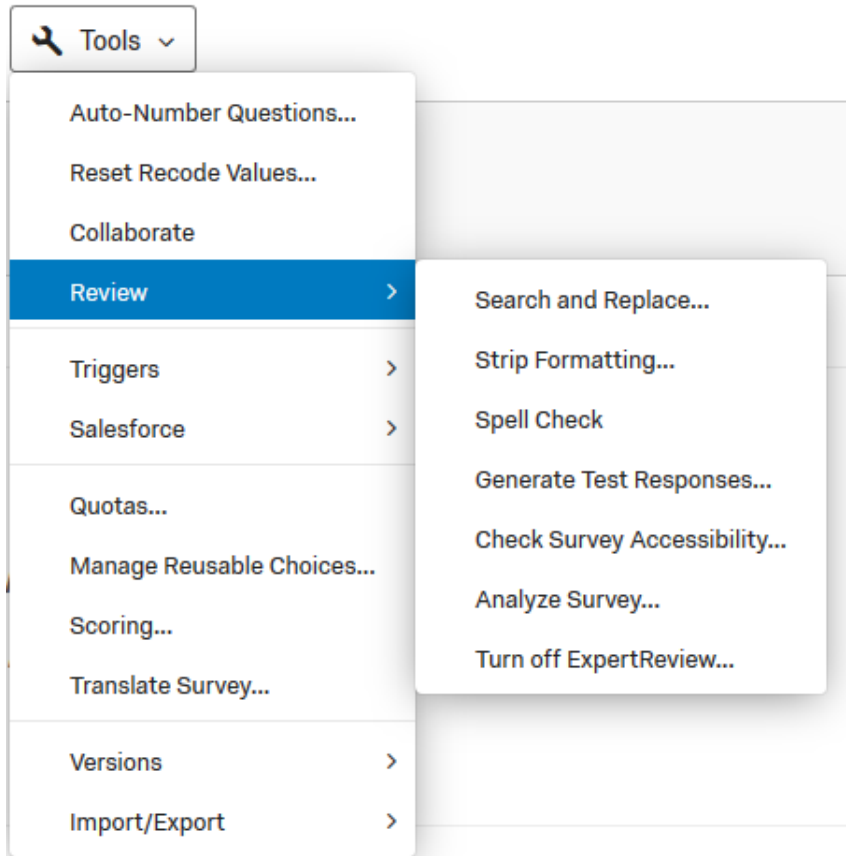
Always spell check your surveys and forms!

Qualtrics 101 at USI

Tools Tab - Triggers (email triggers)

Default settings

Qualtrics 101 at USI

Tools Tab - Triggers (email triggers)

Example settings

☑ ✉ **Send An Email On Survey Complete:**

| Question ⌄ | Q6 Are you a memb...umni Association? ⌄ | Yes ⌄ | Is Selected ⌄ | ⊖ ⊕ |

To Email Address:	${q://QID2/ChoiceTextEntryValue/3}
From Name:	Qualtrics 101 Trainer - Kat Draughon
Reply-To Email:	kdraughon@usi.edu
Subject:	Qualtrics 101 Survey Confirmation

Message:

{A} ⊡ Font ⌄ Size ⌄ **B** *I* U ⟨⟩ Less...

▯ ▶ **A**▾ **A**▾ ≡ ≡ ≡ ↩ ↪ ⫤ ⫤ ⅟≡ ⋮≡ ⊞ 🔗 🔗̸ *I*ₓ

${q://QID2/ChoiceTextEntryValue/1},

Thank you for being a USI alumni member and signing up for Qualtrics 101.

When: Send immediately ⌄

Include Response Report ☐

Finish Editing

Qualtrics 101 at USI

Tools Tab - Triggers (email triggers) - Settings and Uses

There are lots of options and reasons to use Trigger Emails

1. Send out confirmation responses
2. Notify someone (yourself or someone else) that a form/survey submission has been made
3. Pipe-in information that was collected from the form (such as email, name, etc.)
4. Create multiple trigger email versions that can be sent out to specific groups depending on what they indicated in the survey (The example is set so that this version of the trigger email only goes to those who said they were a member of the USI alumni association)
5. You can customize the From Name
6. You can enter a specific email, such as your own, in the reply-to, BUT be aware the respondent will not see that email, but any replies will actually go to the email you specify.
7. Best to uncheck the "Include Response Report" unless you want to include the data submitted as part of the trigger email. NOT RECOMMENDED EXCEPT FOR CERTAIN FORMS.

Qualtrics 101 at USI
Tools Tab - Versions – Version History

Version History lets you see what, when and who has made changes to the survey. Very helpful if you have collaborators or if you need to revert to an earlier version.

Qualtrics 101 at USI
Tools Tab - Import/Export
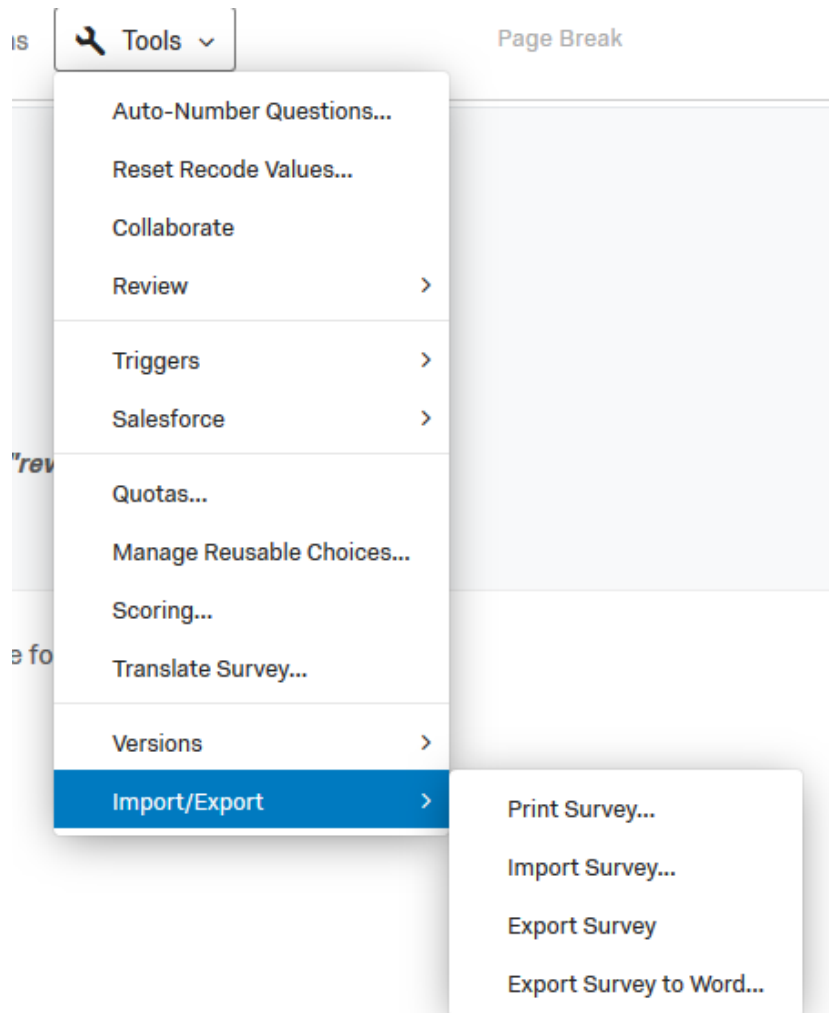
Qualtrics 101 at USI
Tools Tab - Import/Export

_____

Print Survey: Prints the survey to a PDF. Great for sharing with others for review.

Import Survey: If you have a Qualtrics survey file (Survey Name.QSF) in another license or someone outside of USI wants to send you a Qualtrics survey to use at USI, you can import the .QSF file into your USI license using this feature.

Export Survey: If you want to send a Qualtrics survey file (.QSF) to someone outside of USI to use within their own Qualtrics license, use this to create a survey file that you can email to someone else to use.

Export Survey to Word: The Word version includes page breaks and other details that make it print out much longer, but it can be useful for some reviews. Print Survey – PDF is generally the better option though.

Qualtrics 101 at USI

Distributions

Qualtrics 101 at USI
Distribution – Anonymous Survey Link
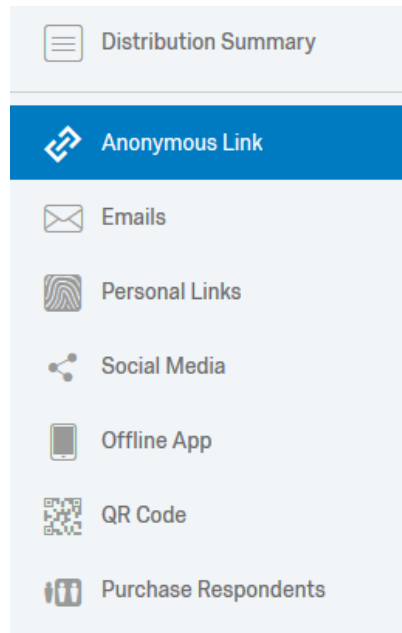
Use the Anonymous Link option to create a link to put in mass emails or on a website.

Type in your Link Text, and it will create a blue link with the same name that you can copy and paste.

Qualtrics 101 at USI

Distribution – Emails Default

Use the Compose Email if you have an email list and want to send targeted reminders to non-responders. Email lists must be uploaded as .CSV file into your Contact library first. Column headers must not have spaces in the titles (ex. Lname or Last_Name, not Last Name) and the column with the email must be spelled with a capital E (Email) .

Qualtrics 101 at USI

Data & Analysis

Data & Analysis – Default view

1. Quick look at # of recorded responses
2. Responses in Progress are surveys that are currently being taken or that someone has stopped before the end of the survey/has not clicked "submit" and the survey data has not been recorded yet.
3. You can add different columns to look at in the default view by hovering over the table and clicking on the Green + and then adding the variable you want to see.

Qualtrics 101 at USI
Data & Analysis – Export & Import
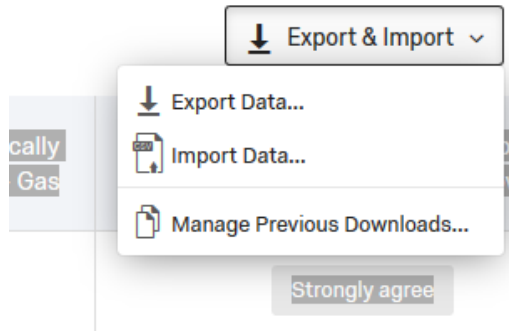
Use the Export Data to download your data file as a .CSV (Excel) or SPSS data file.
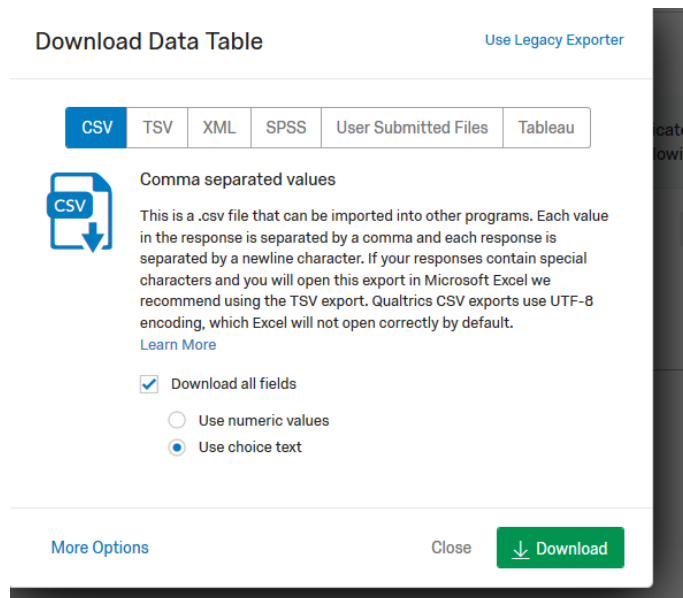
Click the *More Options* and select "Split multi-value fields into columns" for multiple choice/select all that apply questions when downloading a CSV file.

Qualtrics 101 at USI

Data & Analysis – Tools
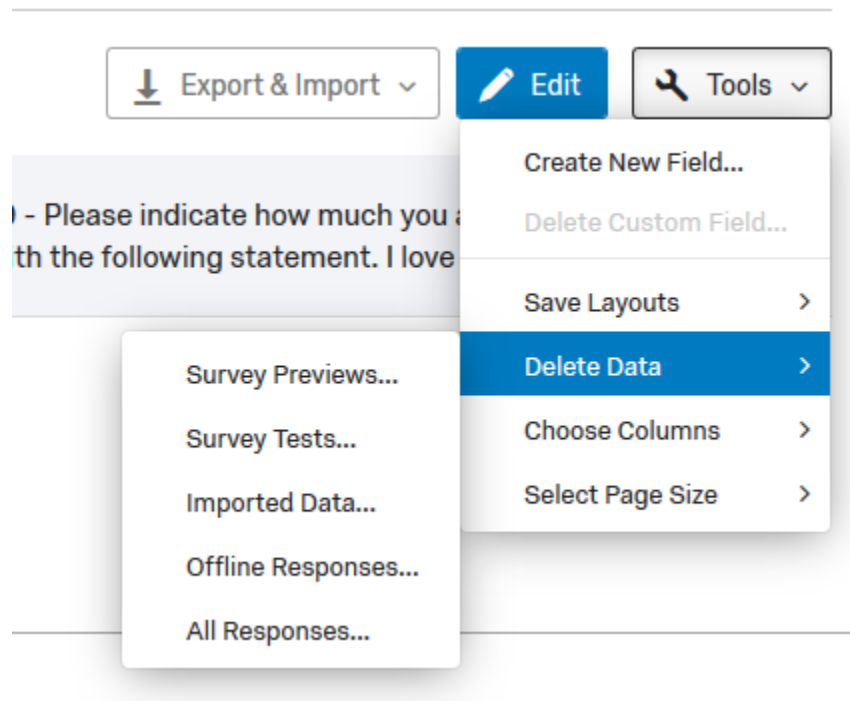
You can delete records using Tools – Delete Data.

To remove "test data" – delete the Survey Previews

Qualtrics 101 at USI

BLOCK OPTIONS – Changing the previous and next arrow buttons
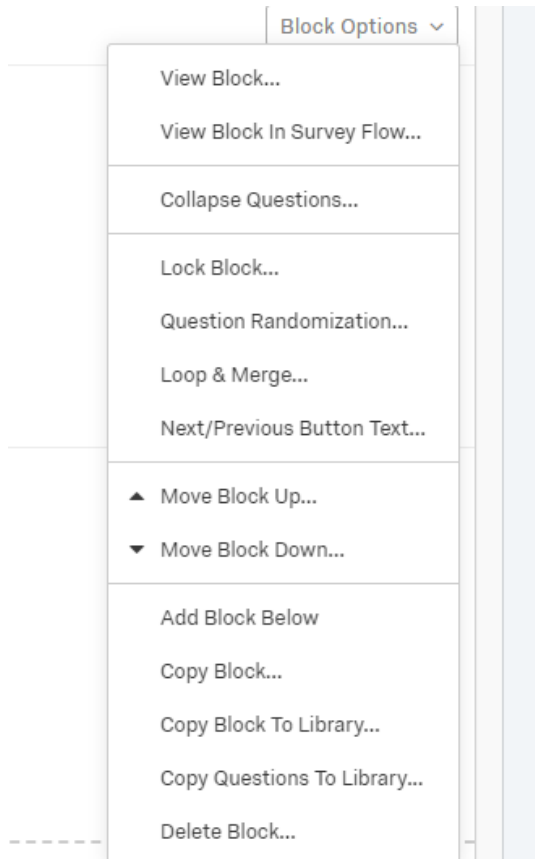
Qualtrics 101 at USI

You can change the previous/back arrow buttons to text. It is recommended to change them to Back and Continue. For the final Submit Block – change the next arrow to "Submit" so that the respondent knows they are at the end of the survey.

Qualtrics 101 at USI

Preview – Testing your survey

Qualtrics 101 at USI

Preview – Testing your survey

1. It is <u>essential</u> that you test your survey multiple times, all the way through submission.
   a. Auto-Renumber questions (under Tools)
   b. Run spell check (under Tools – Review)
   c. Change the back/forward arrow buttons to "Back" and "Continue" (you will need to do so for each Block)
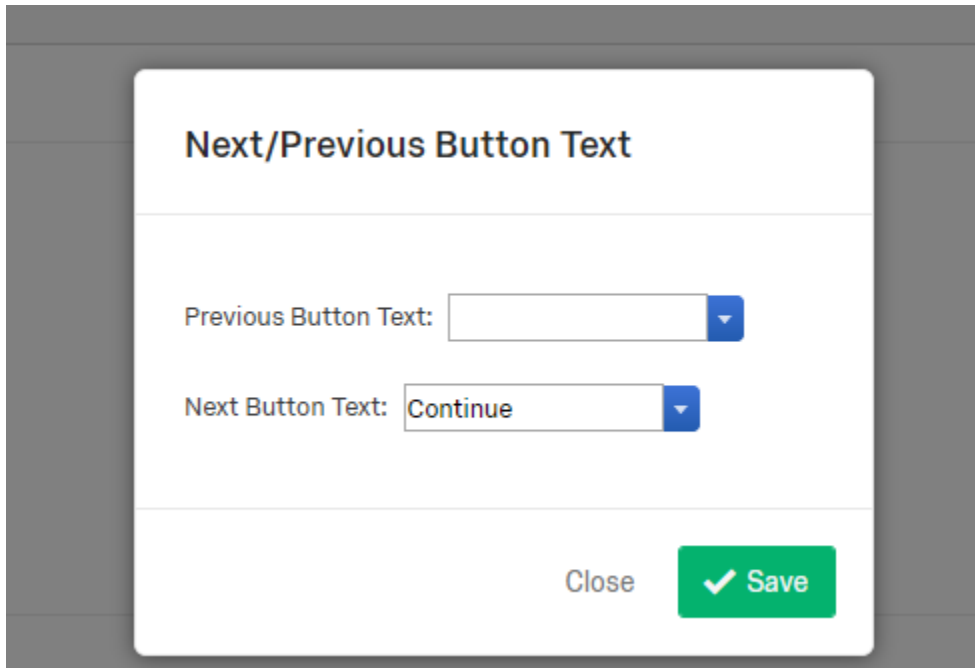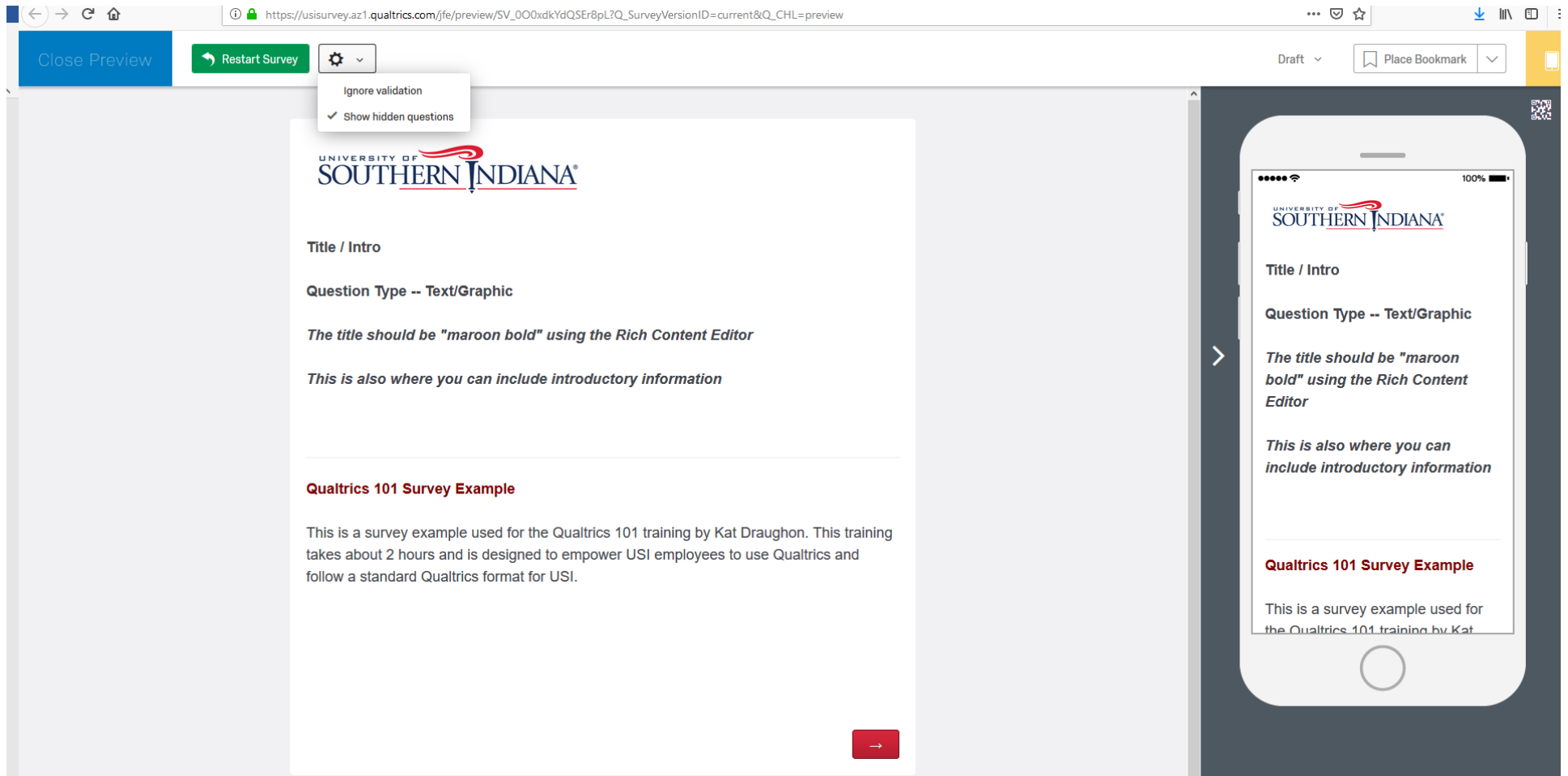   d. Look for formatting issues
   e. Look for places to add page breaks so the form/survey it doesn't run on or require a lot of scrolling
   f. Review the end message and any trigger email messages by entering your own email as the respondent
   g. Review the actual data file to make sure the data is coming in as you would expect
   h. Check that the answer categories match the questions
   i. Test any skip logic, display logic, and /or forced responses
   j. To move through the survey without testing logic – check "ignore validation" (only after you've tested the logic).

Qualtrics 101 at USI
Good Survey Design Tips

As a rule – survey questions should be written the same way you would ask them out-loud to someone.

Example of a questions answer mis-match/bad grammar

Please indicate your <mark>level of satisfaction</mark> with the career discussion you just had:

<mark>(Very Much)</mark> 5   4   3   2   1 (Not at all)

Revised versions:

Please indicate your level of satisfaction with the career discussion you just had:

Very satisfied - 5 4 3 2 1 - Not At all Satisfied

-OR-

Please indicate how much you agree with the following statement:

The career discussion was helpful to me.

Strongly Agree, Agree, Neither Agree nor Disagree, Disagree, Strongly Disagree

Qualtrics 101 at USI

1. Don't use acronyms, but if you must, spell them out the first time used.

2. Use Screener questions to shorten a survey.
   a. Do you like pizza? Yes or No
      i. If yes, use Display Logic to display the question: What kind of pizza do you like?
      ii. If no, it will go to the next question.

3. Use page breaks liberally, especially on long surveys. Also use page breaks when the question topics or question types change.

4. Don't make any assumptions on behalf of the respondent, i.e. don't assume he or she will understand a question just because you do. Best to test your survey on someone who is not familiar with the topic.

5. Survey Design Golden Rule – if you dropped a copy of the survey in the parking lot, could anyone who picked it up be able to understand it and complete it?

6. Survey formatting sets the tone for the survey. You want the survey to look professional, be easy to use and understand. Be consistent throughout with the look and feel of the survey (i.e. same font size, type, color, question styles, spacing between lines, etc.)

Qualtrics 101 at USI

7. Not every survey takes "10 minutes or less" to complete. Time someone else taking the survey during testing to get a true sense of the length.

8. Download and examine the test data – Make sure you are collecting everything you need to and that variables are of the right type for any statistical analysis **BEFORE YOU GO LIVE** with the survey.

9. **IMPORTANT – If you need to make changes to a survey/form AFTER IS HAS GONE LIVE – download your data BEFORE you make any changes. Changing, deleting or adding questions after data collection has begun can result in <u>loss of all data</u>. THIS HAS HAPPENED!**