



# RowanUniversity

INFORMATION RESOURCES & TECHNOLOGY

# Qualtrics

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<http://www.rowan.edu/irt-training>

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# **Learning Objectives**

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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.

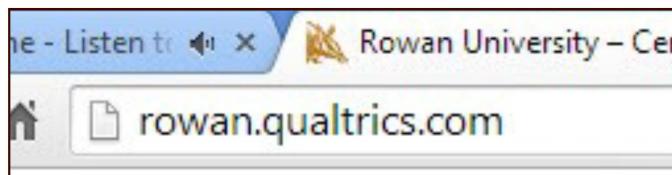
The faculty and staff license allows unlimited surveys and the student license allows two active surveys with a total of 1,500 responses.

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.

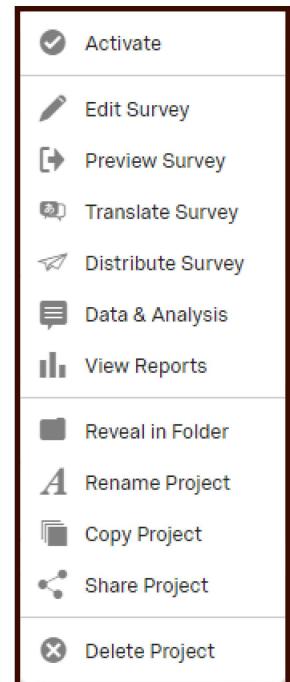
You will then be logged in to Qualtrics to begin building your survey.



# 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.

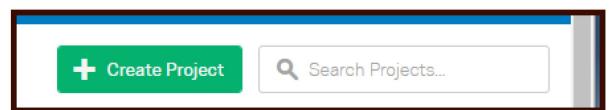
1. Activate
2. Edit Survey
3. Preview Survey
4. Translate Survey
5. Distribute Survey
6. Data & Analysis
7. View Reports
8. Reveal in Folder
9. Rename Project
10. Copy Project
11. Share Project
12. Delete Project



Screenshot of the Qualtrics My Projects interface. The page title is "My Projects". The URL is <https://rowan.co1.qualtrics.com/WRQualtricsControlPanel/?ClientAction=ChangePage&Section=MyProjectsSection>. The top navigation bar includes "Projects", "Contacts", "Library", "Help & Feedback", and a user profile icon. A green "Create Project" button and a search bar ("Search Projects...") are also present. The main content area shows a table of "All Projects" with one item: "My First Survey". The table columns are "Status" (New), "Questions" (1), "Est. Response Time" (1 minute), and "Languages" (0). The row for "My First Survey" includes a star icon, a document icon, and the survey name. The page is sorted by "Last Modified".

# Create Survey

Select the **Create Project** button.



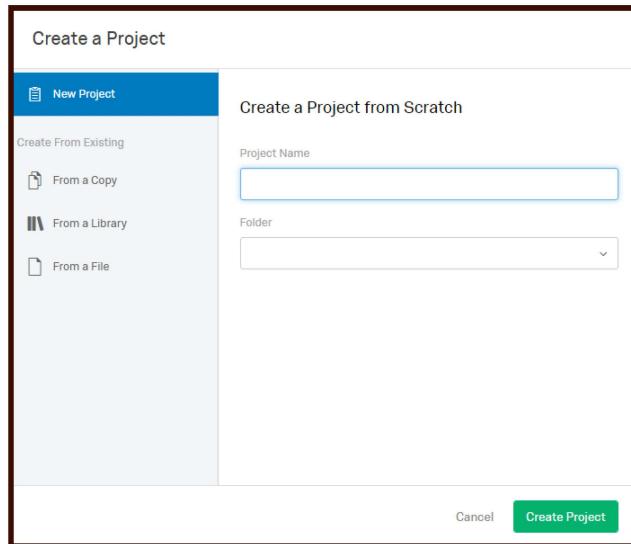
You will have four choices in building a survey:

**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.

The screenshot shows the Qualtrics Control Panel interface. On the left, the 'My Projects > My First Survey' section is visible, featuring a 'Default Question Block' containing a 'Multiple Choice' question with three options. A red arrow points from this question to the 'Create a New Question' button, which is highlighted with a green box. Another red arrow points from the 'Multiple Choice' question in the list to its corresponding icon in the sidebar.

Qualtrics Control Panel

Projects Contacts Library Help & Feedback

Survey Distributions Data & Analysis Reports

Look & Feel Survey Flow Survey Options Tools

Preview Survey Search Questions...

### My First Survey

Default Question Block

Block Options

Q1 Click to write the question text

Click to write Choice 1  
Click to write Choice 2  
Click to write Choice 3

Import Questions From... Create a New Question

Add Block

### Static Content

### Standard Questions

- Multiple Choice

### Specialty Questions

- Text Entry
- Rank Order
- Constant Sum
- Hot Spot
- Graphic Slider
- Drill Down
- Highlight
- Timing
- File Upload

### Advanced

- Graphic
- Matrix Table
- Slider
- Side by Side
- Pick, Group, and Rank
- Heat Map
- Gap Analysis
- Net Promoter Score®
- Signature
- Meta Info Question
- Captcha Verification

## Select Multiple Choice

# Edit Survey - Format Questions

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.

The screenshot shows the Qualtrics Control Panel with the following details:

- Survey Title:** My First Survey
- Question Block:** Default Question Block
- Question ID:** Q1
- Question Text:** Click to write the question text
- Choices:** 3 (radio buttons for Click to write Choice 1, Click to write Choice 2, Click to write Choice 3)
- Buttons:** Import Questions From..., Create a New Question
- Right Panel (Multiple Choice Settings):**
  - Change Question Type: Multiple Choice
  - Choices: 3, Edit Multiple, Automatic Choices
  - Answers: Single Answer (selected), Multiple Answer
  - Position: Vertical (selected), Horizontal
  - Validation Options: Force Response
  - Validation Type: None (selected), Custom Validation
  - Actions: Add Page Break, Add Display Logic, Add Skip Logic, Copy Question, Move Question, Add Note, Preview Question

Select **Click to write the question text**

Type *Do you like ice cream?*

Tab

Qualtrics provides possible answers to the question.

The screenshot shows the Qualtrics survey editor with the following details:

- Survey Title:** Default Question Block
- Question ID:** Q1
- Question Text:** Do you like ice cream?
- Answers:** Yes, No
- Buttons:** Import Questions From..., Create a New Question

## Edit Survey - Format Questions

From the right panel, increase the number of choices. You will see that Qualtrics automatically gives responses for you.

My First Survey

Default Question Block

Block Options

Q1 Do you like ice cream?

- Definitely yes
- Probably yes
- Might or might not
- Probably not
- Definitely not

Change Question Type

Multiple Choice

Choices: 5 Edit Multiple

Automatic Choices: Yes - No

Answers:

- Single Answer
- Multiple Answer
- More...

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

Select Definitely yes and type Only in the summer.

Do you like ice cream?

- Only in the summer
- Probably yes
- Might or might not
- Probably not
- Definitely not

Do you like ice cream?

- Only in the summer
- Probably yes
- Might or might not
- Probably not
- Definitely not

You can add more choices by:  
Selecting the last answer  
Selecting Enter

Change all of the answer choices

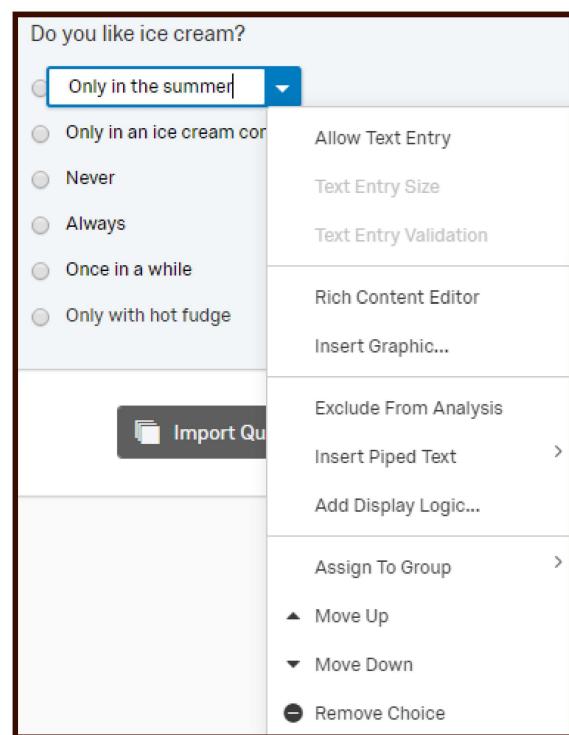
Q1 Do you like ice cream?

- Only in the summer
- Only in an ice cream cone
- Never
- Always
- Once in a while

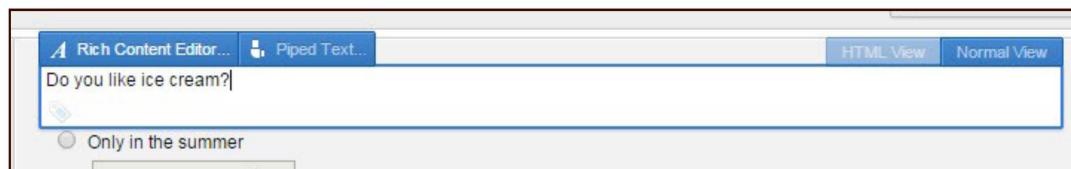
## Edit Survey - Format Questions

The drop down menu next to each question allows other options such as **Allow Text Entry**, **Insert Graphic** and **Exclude From Analysis**.

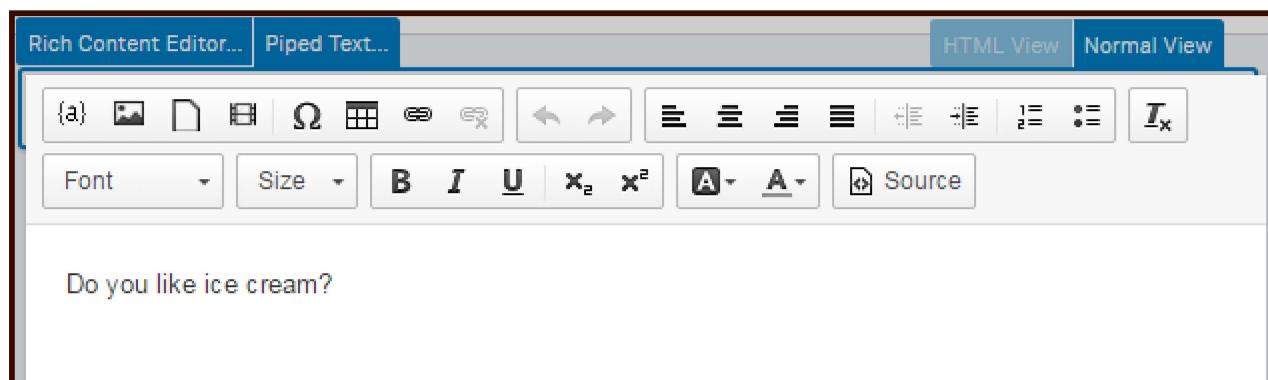
<input checked="" type="checkbox"/> Q1 	<p>Do you like ice cream?</p> <ul style="list-style-type: none"> <li><input type="radio"/> Only in the summer</li> <li><input type="radio"/> Only in an ice cream cone</li> <li><input type="radio"/> Never</li> <li><input type="radio"/> Always</li> <li><input type="radio"/> Once in a while</li> </ul>
---	---



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.



# Edit Survey - Insert and Format Questions

## 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

What kind of cones do you like?

- 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)

What kind of ice cream do you like (choose as many as you wish)

- Chocolate
- Vanilla
- Strawberry
- Mint Chip
- Coffee
- Other

### Add Question 4 - Rank order

Rank the following ice cream vendors:

Friendly's

Dairy Queen

Bruster's

Mr. Softee

Rita's

Rank the following ice cream vendors

Friendly's	1
Dairy Queen	2
Mr. Softee	3
Rita's	4

### 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)

Why don't you like ice cream (choose as many as are applicable) ?

- It's too cold
- It's too creamy
- Too many calories
- Too sweet
- Other

### Add Question 6 - Text Entry Multi Line

What other desserts do you like?

What other desserts do you like?

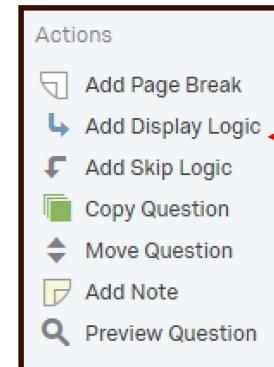
## Edit Survey - Display Logic

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.

Display Logic (What kind of cones do you like?)

Display this Question only if the following condition is met:

If   Only in an ice cream cone  - +

In Page Close ✓ Save

The question will then have the display logic visible above it.

Display This Question:  
If Do you like ice cream? Only in an ice cream cone Is Selected

Q2 What kind of cones do you like?  
 Sugar cone  
 Waffle Cone  
 Wafer (cake) cone  
 Cookie Cone

Practice -

Select Question 5 - Why don't you like ice cream?

Display it only if in Question 1 - Never - is selected.

Display This Question:  
If Do you like ice cream? Never Is Selected

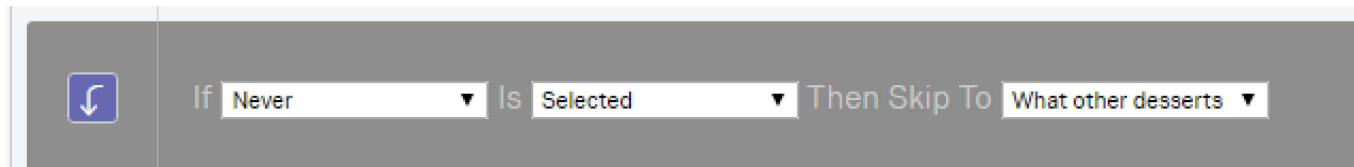
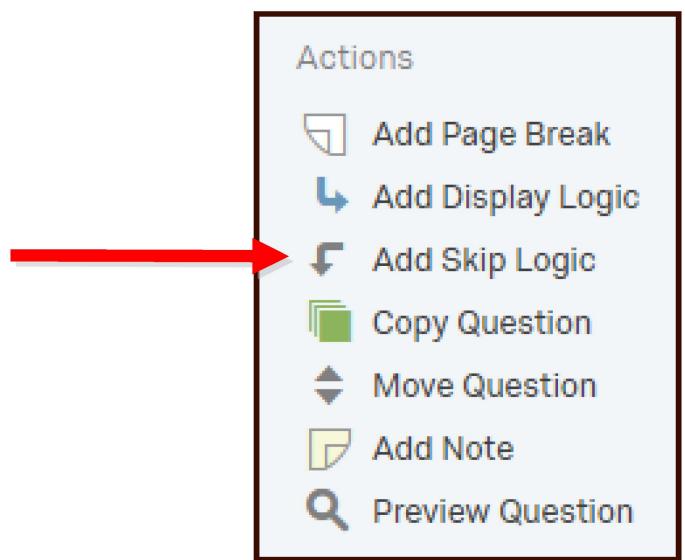
Q6 Why don't you like ice cream (choose as many as are applicable)?  
 It's too cold  
 It's too creamy  
 Too many calories  
 Too sweet  
 Other

## 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.



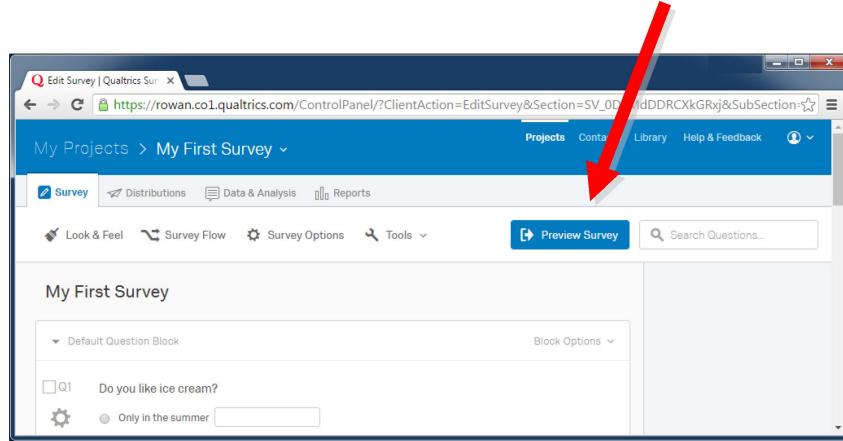
Complete the information in the Skip Logic wizard.

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

Select Done.

## Edit Survey - Preview

To preview the survey, and test your logic, click on the button **Preview Survey** at the top of the page.



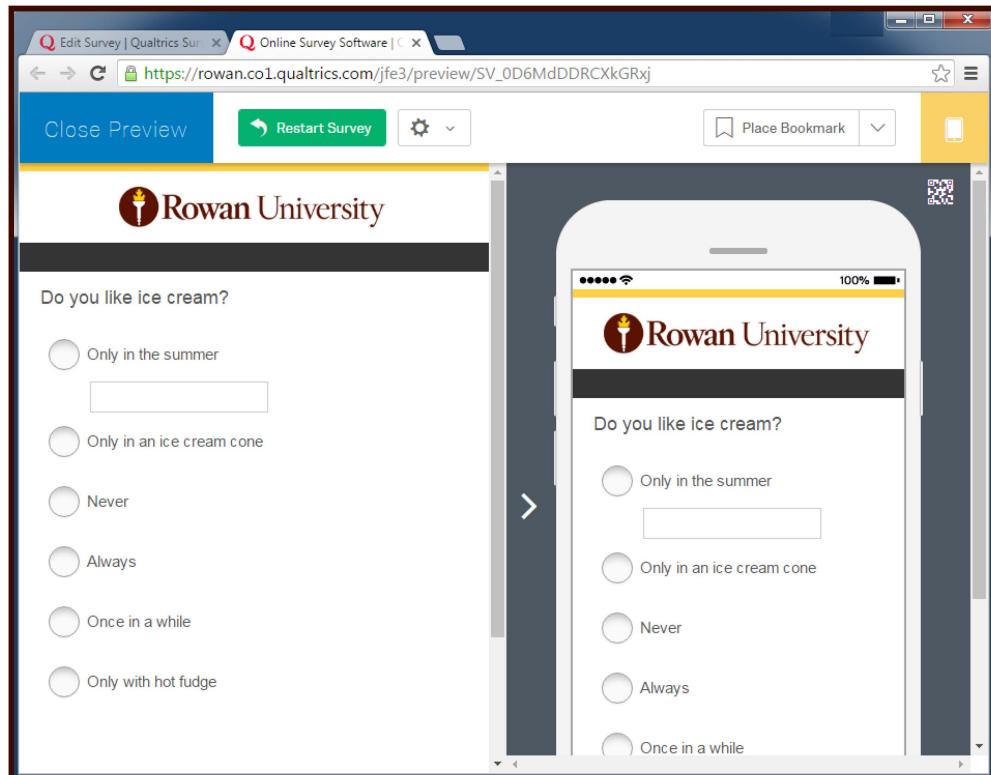
The preview shows both how it will look in a browser and on a mobile device.

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.

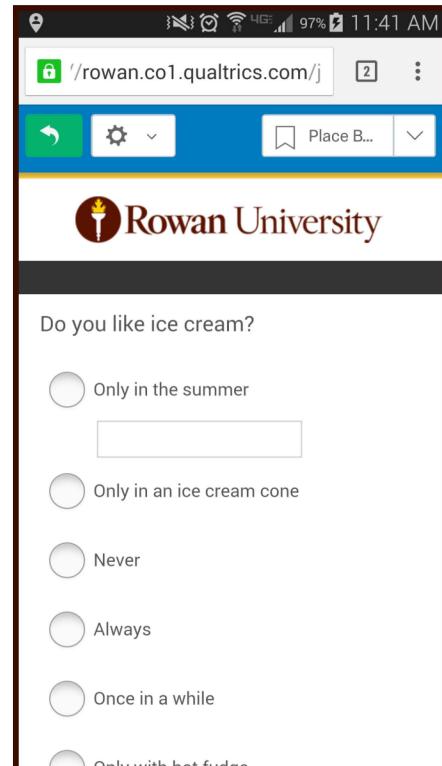
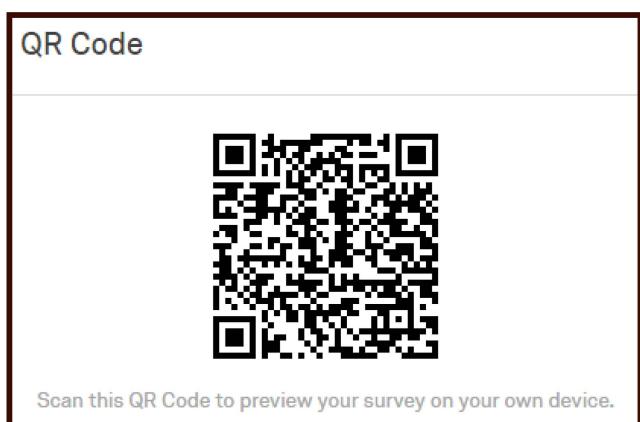
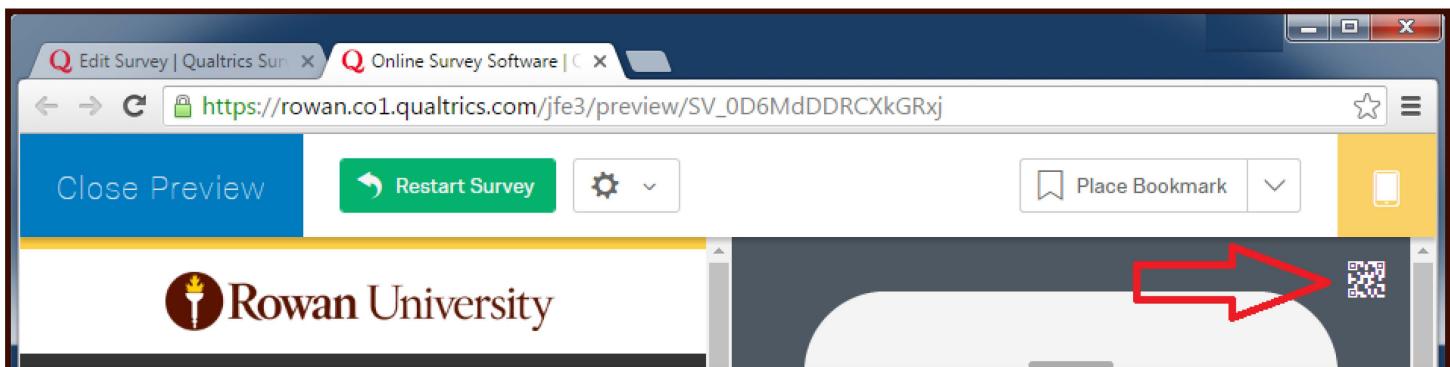


## Edit Survey - Preview

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.

<https://play.google.com/store/apps/details?id=com.google.zxing.client.android>

<https://itunes.apple.com/us/app/i-nigma-qr-code-data-matrix/id388923203>



# 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

The screenshot shows a survey editor interface. On the left, there is a list of questions under a heading 'Rank the following ice cream vendors'. The questions are: Friendly's (ranked 1), Dairy Queen (ranked 2), Mr. Softee (ranked 3), and Rita's (ranked 4). To the right of this list is a vertical context menu titled 'Actions'. The 'Add Page Break' option is highlighted with a red arrow pointing to it. Other options in the menu include: Add Display Logic, Add Skip Logic, Copy Question, Move Question, Add Note, and Preview Question.

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.

The screenshot shows the top navigation bar of the SurveyGizmo interface. It includes tabs for 'Survey', 'Distributions', 'Data & Analysis', and 'Reports'. Below the navigation bar is a 'Tools' menu with icons for 'Look & Feel', 'Survey Flow', 'Survey Options', and 'Tools' (with a dropdown arrow).

The screenshot shows the 'Look & Feel' settings section. On the left, there is a preview area for 'Rowan University: UW' showing a survey title and a question about destination interest. Below this is a 'Faculty/Staff Theme' button. On the right, there are several configuration options: 'General' (Next Button Text: >>, Back Button Text: <<), 'Fonts', 'Colors', 'Advanced' (Progress Bar: No Progress Bar, Page Transition: None, Questions per Page: [empty input]), and checkboxes for 'Highlight Questions' and 'Question Separator'.

# Create Contacts

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

Projects   **Contacts**   Library   Help & Feedback



**+ Create Contact List**

**Create Contact List**

Name

Folder

[Cancel](#) [Next >](#)

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.

**Add Contacts**

[Import From a File](#) [Add Manually](#) [Import From a Survey](#)

[Browse...](#) [Reload](#) Delimiter: Comma Enclosure: "

**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](#)

[Skip this step](#) [Add Contacts](#)

**Practice:**

Import the contact list from the .csv file that was emailed to you.

## Distribute Survey

Select the Distributions tab.



How do you want to distribute your survey?



Email



Web



Social



Mobile

Send with Qualtrics

Compose Email

Use your own email system

Get a single reusable link

Generate a trackable link for each contact

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.

Compose Email

To: Select Contacts

From: Name: beth Hegel Reply-To Email: hegel@rowan.edu

From: + New Contact List Use Contacts From a Library My Library: Marybeth Hegel > Organization Library: Rowan University >

When: Search... + New Contact List ATW Practice > ice cream panel 2 > Mailing Practice 2 > New Panel 2015-11-10 14:16:54 > Qualtrics Training Class >

Subject: Subject

Message: Load Message

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}

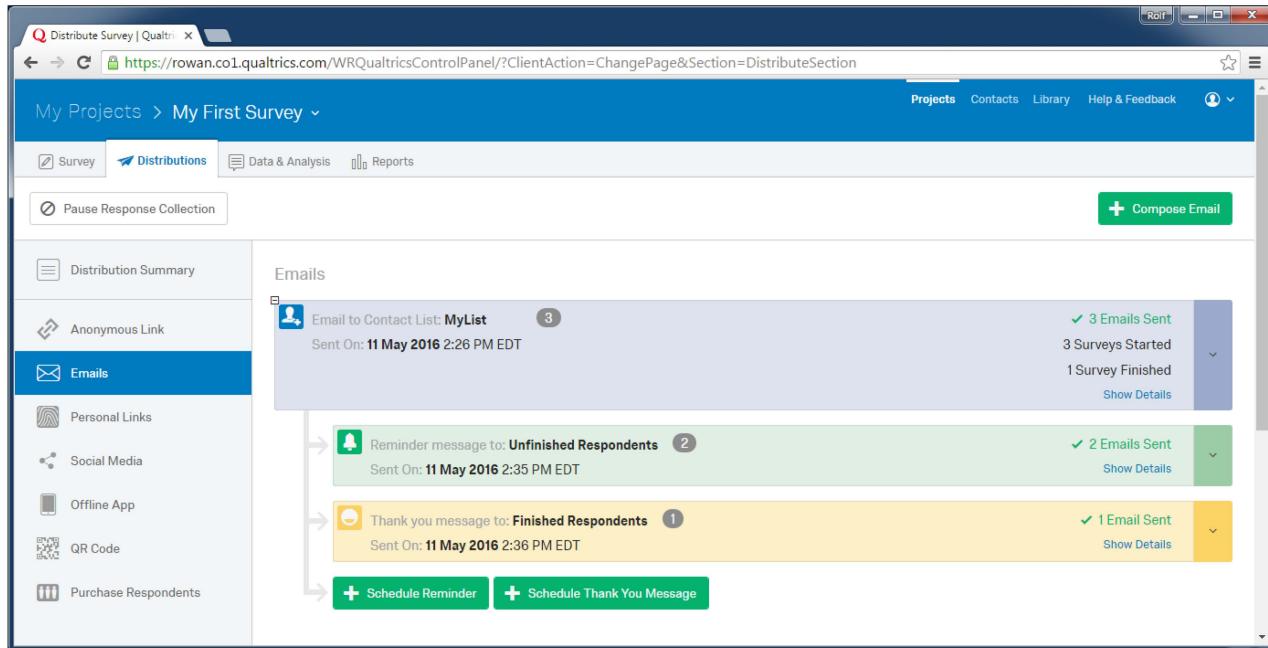
Show Advanced Options Cancel Send Preview E

1 of 2

The screenshot shows a 'Compose Email' interface. In the 'To:' field, there is a dropdown menu titled 'Select Contacts'. Below it, a list of contact sources is shown: '+ New Contact List', 'Use Contacts From a Library', and two specific library lists: 'My Library: Marybeth Hegel' (selected) and 'Organization Library: Rowan University'. To the right of the contact list, there is a search bar and a checkbox for 'Select Entire Contact List'. A scrollable list of names follows, including Abraham Lincoln, George Washington, Besty Ross, Molly Pitcher, Abigail Adams, Thomas Jefferson, Paul Revere, Alexander Hamilton, Benjamin Franklin, and Eliza Schuyler, all associated with the email address 'hegel@rowan.edu'. At the bottom of the window, there are buttons for 'Show Advanced Options', 'Cancel', and 'Send Preview E'. The footer indicates '1 of 2'.

# 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.

New Reminder Email

**To:** Unfinished Respondents

**From:** survey@rowan.edu    **From Name:** Marybeth Hegel    **Reply-To Email:** hegel@rowan.edu

**When:** Send in 1 hour

**Subject:** ATW Practice

**Message:**

Follow this link to the Survey:  
\$(t:/SurveyLink?d=Take the survey)

Or copy and paste the URL below into your internet browser:  
\$(t:/SurveyURL)

Follow the link to opt out of future emails:  
\$(t:/OptOutLink?d=Click here to unsubscribe)

**Cancel** **Send Preview Email** **Send in 1 hour**

New Thank You Email

**To:** Finished Respondents

**From:** survey@rowan.edu    **From Name:** Marybeth Hegel    **Reply-To Email:** hegel@rowan.edu

**When:** Send in 1 hour

**Subject:** ATW Practice

**Message:**

Follow the link to opt out of future emails:  
\$(t:/OptOutLink?d=Click here to unsubscribe)

**Cancel** **Send Preview Email** **Send in 1 hour**

# Email - Duplicates

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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](mailto: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](mailto:carolinep+1@qualtrics.com); [carolinep+2@qualtrics.com](mailto:carolinep+2@qualtrics.com).

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

Example: [carolinep@qualtrics.com](mailto:carolinep@qualtrics.com), [Carolinep@qualtrics.com](mailto:Carolinep@qualtrics.com), and [CarolineP@qualtrics.com](mailto: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](mailto:support@qualtrics.com). As always you may contact your Brand Administrator, June Ragone at [ragonej@rowan.com](mailto: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.

The screenshot shows the Qualtrics Survey Software interface. At the top, there's a blue header bar with the project name "My Projects > My First Survey". Below the header, there are tabs for "Survey", "Distributions", "Data & Analysis" (which is selected), and "Reports". Under "Data & Analysis", there are sub-tabs: "Data" (selected), "Text", and "Cross Tabs". On the right side of the header, there are links for "Projects", "Contacts", "Library", "Help & Feedback", and a user profile icon. Below the header, there are two status indicators: "Completed Responses 2" and "Responses in Progress 1". The main content area is a table showing survey responses. The columns are: a checkbox column, "Recorded Date" (dropdown), "Q2 - What type of ice cream do you like?", "Q3 - What other desserts do you like?", and "Actions". There are two rows of data:

<input type="checkbox"/>	Recorded Date	Q2 - What type of ice cream do you like?	Q3 - What other desserts do you like?	Actions
<input type="checkbox"/>	May 11 2016 14:38	Rum Rasin	Cakes	<input type="button" value="▼"/>
<input type="checkbox"/>	May 11 2016 14:28	Chocolate Marshmallow	Pies	<input type="button" value="▼"/>

Under the Actions drop down, there are several choices:

- View Response
- Delete Response
- Retake Response
- Retake as New Response
- Export to PDF

**View Response**

**Delete Response**

**Retake Response**

**Retake as New Response**

**Export to PDF**

# Data & Analysis - Download and Crosstab

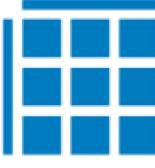
Select the Data & Analysis tab at the top, the Data tab in the next row, and then click on the Export/Import drop down on the left side.

Export Data

Export/Import Tools

- Export Data...
- Import Data...
- Manage Previous Downloads...

**Download This Table**



Download the columns and filtered data currently included in the Data tool. This download cannot be imported into Qualtrics.

**Export Complete Data Set**



Download all fields and responses for this project except for tags and custom columns. This export can be imported into Qualtrics.

Close

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.

Export Data Set

CSV XML SPSS HTML Fixed Field Text User Submitted Files

**Statistical Analysis Package**

Statistical Package for the Social Sciences (SPSS) is one of the most widely used software packages for survey analysis. This is an SPSS sav data file with raw data, variable and value labels.

Only include responses between:

Start Date:  End Date:

More Options Close  Download

# Reports

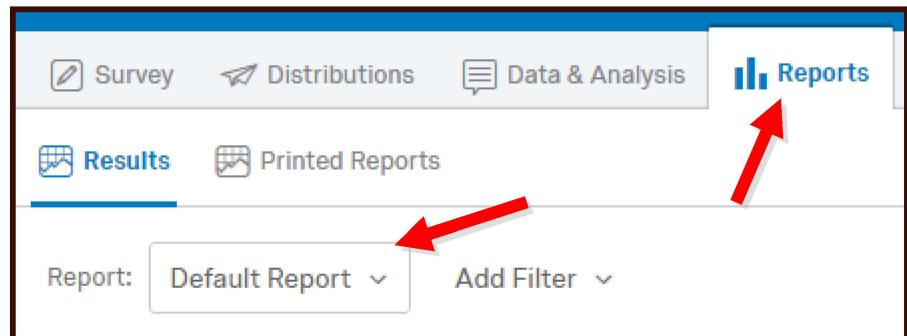
Select a Project from your list of surveys

Select Reports tab

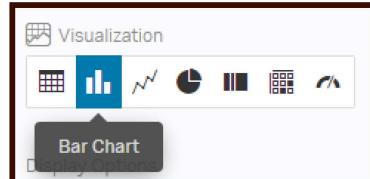
The Default Report is displayed, or you can select a report to view

Question Pages

- Q1 - Do you like ice cream?
- Q2 - What type of ice cream do you like?
- Q3 - What other desserts do you like?



Select questions from the left side panel to see the responses and statistics



Can add a graph (with options like pie, bar, etc.)

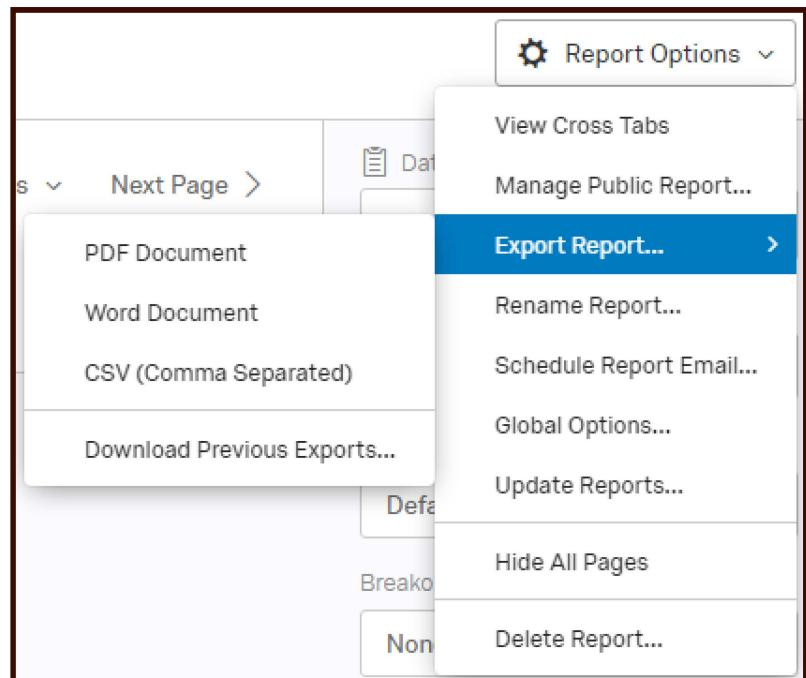
Add a filter (ex. - gender - female)

Add Filter ▾

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.

The screenshot shows a survey configuration interface. Question Q1 asks "Do you like ice cream?" with options: Only in the summer, Only in an ice cream cone, Never, Always, Once in a while, and Only with hot fudge. A gear icon indicates settings. Below Q1 is a blue bar labeled "Display This Question: If Do you like ice cream? Never Is Not Selected". Question Q2 asks "What type of ice cream do you like?" with options: Chocolate Marshmallow, Rum Rasin, Cherry Vanilla, and Tutti Fruiti. A gear icon indicates settings.

**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:

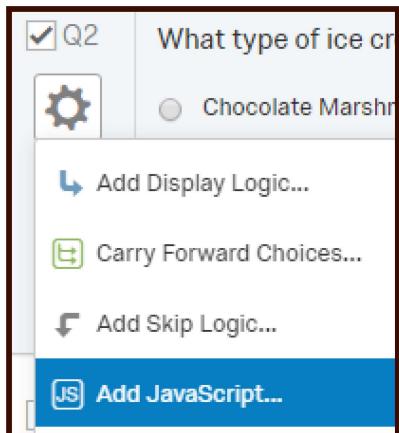
Bring forward only selected or not selected choices.

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?

The screenshot shows a survey configuration interface for question Q2. The question is "What type of ice cream do you like?" with an option "Chocolate Marshmallow". A gear icon indicates settings. Below the question are three buttons: "Add Display Logic...", "Carry Forward Choices...", and "Add Skip Logic...".

## Advanced Options

Add Java Script. You can copy and paste the code.

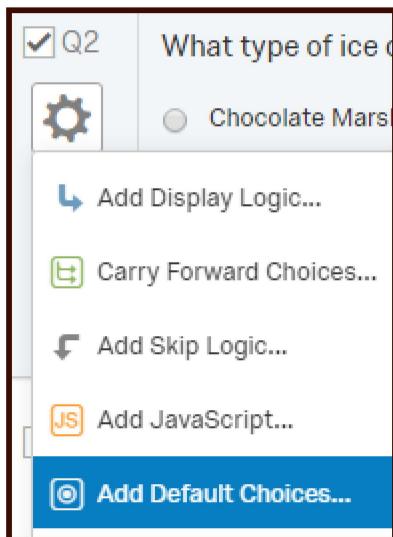


Q2 What type of ice cr  
Chocolate Marshr  
Add Display Logic...  
Carry Forward Choices...  
Add Skip Logic...  
**JS Add JavaScript...**

### Edit Question JavaScript

```
Qualtrics.SurveyEngine.addOnload(function()
{
    /*Place Your JavaScript Here*/
});
```

Add Default Choices—Make some choices default.



Q2 What type of ice cr  
Chocolate Marshr  
Add Display Logic...  
Carry Forward Choices...  
Add Skip Logic...  
**JS Add JavaScript...**  
**Default Choices...**

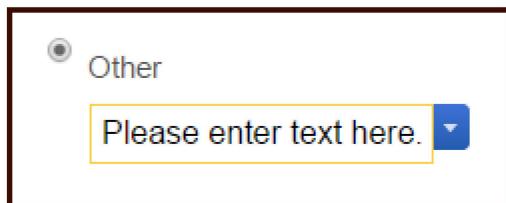
### Edit Default Choices



Rowan University

What type of ice cream do you like?

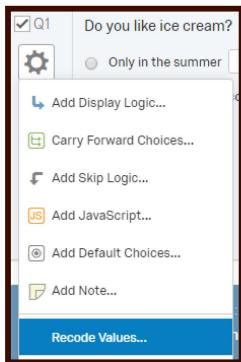
Chocolate Marshmallow



Other  
Please enter text here. ▾

Default to a text box like “Enter your name here.”

# Advanced Options



### Recode Values

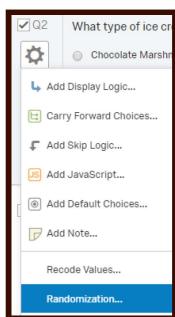
This panel allows you to change the internal names of survey choices while keeping the user-facing text the same. It shows a list of current values and their corresponding variable names:

Current Value	Variable Name
Only in the summer	Only in the summer
Only in an ice cream cone	Variable Name (highlighted)
Never	Never
Always	Always
Once in a while	Once in a while
Only with hot fudge	Only with hot fudge

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.



### Choice Randomization

This panel lets you control how survey choices are presented:

- No Randomization (selected)
- Randomize the order of all choices
- Present only  of total choices
- Advanced Randomization [Set Up Advanced Randomization](#)

## Advanced Randomization

### Fixed Display Order

Display the choices in the order they appear below:

- {Randomized}
- {Randomized}
- Other

### Randomize Choices

Randomize and insert all items from the list below:

- Rum Rasin
- Chocolate Marshmallow

### Random Subset

Randomly insert  choices from the list below:

- Cherry Vanilla
- Tutti Fruiti

Evenly Present Elements

### Undisplayed Items

Do not display the choices below:

- (empty box)

# 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.

The screenshot shows the 'Piped Text...' tab selected in the Rich Content Editor toolbar. A dropdown menu titled 'Survey Question' is open, listing various data sources. The 'Survey Question' option is highlighted. Below it, a search bar shows 'Q2 What type of ice cream do you like?' which is also highlighted. To the right, a list of available text blocks includes 'Chocolate Marshmallow - Description', 'Rum Rasin - Description', 'Cherry Vanilla - Description', 'Tutti Fruiti - Description', 'Other - Description', 'Other (Text Entry)', 'All Choices - Displayed & Hidden', and 'Displayed Choices'. A 'Create a New Question' button is visible at the bottom of the list.

The screenshot shows the Rich Content Editor with the 'Piped Text...' tab selected. The main area contains the text: 'Would you like a free sample of \${q://QID2/ChoiceGroup/SelectedChoices}'. Below the text, there is an 'Edit Question Label' button.

## 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.

▼ Click Here to Rename Block

Q1 Do you like ice cream?

  Only in the summer

  Only in an ice cream cone

  Never

Always

  Once in a while

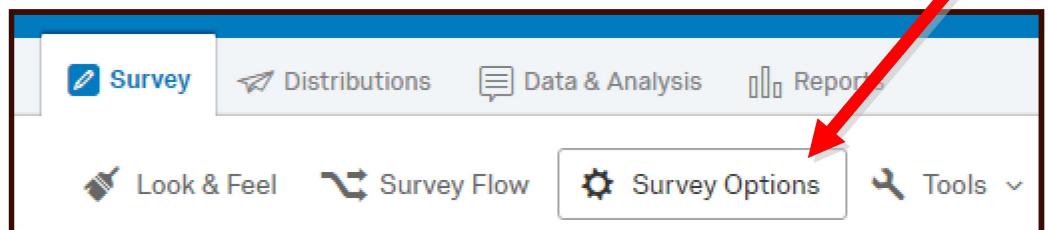
  Only with hot fudge

**Block Options ▾**

- [View Block...](#)
- [Collapse Questions...](#)
- [Lock Block...](#)
- [Question Randomization...](#)
- [Loop & Merge...](#)
- [Next/Previous Button Text...](#)
- [▲ Move Block Up...](#)
- [▼ Move Block Down...](#)

# Advanced Options

## Survey Options



### 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 The language the survey is written in.

**Survey Title:** Online Survey Software | Qualtric 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.

**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.

**Survey Termination**

- Default end of survey message.
- Custom end of survey message...

Redirect to single response report.  
 Redirect to a full URL, ex. "http://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 panel association (not recommended).

**Inactive Surveys**

- Default inactive survey message.
- Custom inactive survey message...

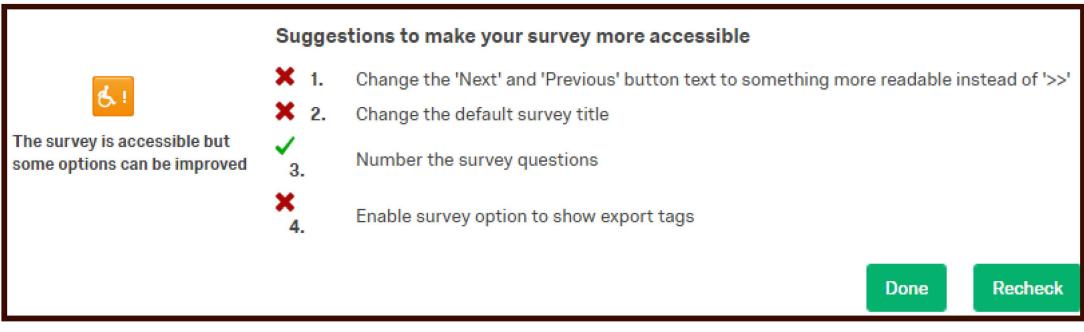
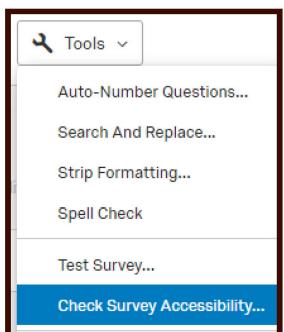
**Partial Completion**

How long to wait before partially completed responses are closed and data is recorded.  
Please note, the recipient cannot continue taking the survey once their data is recorded:

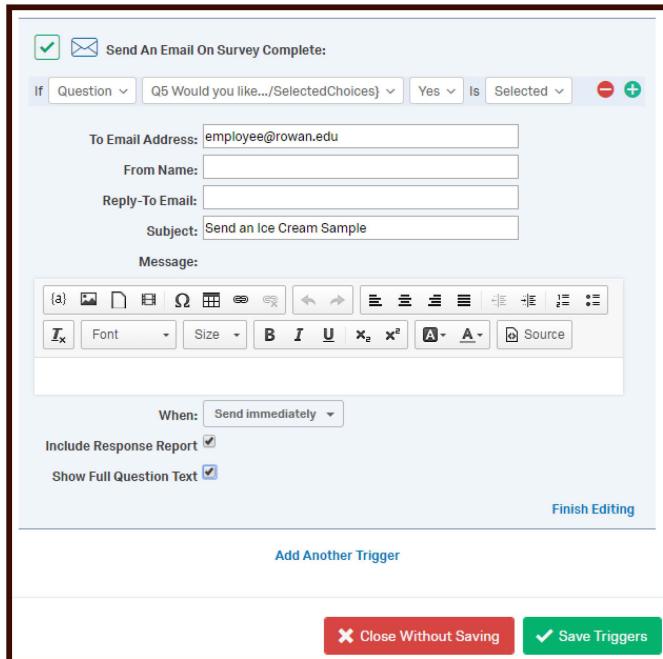
After 1 Week

# Advanced Options

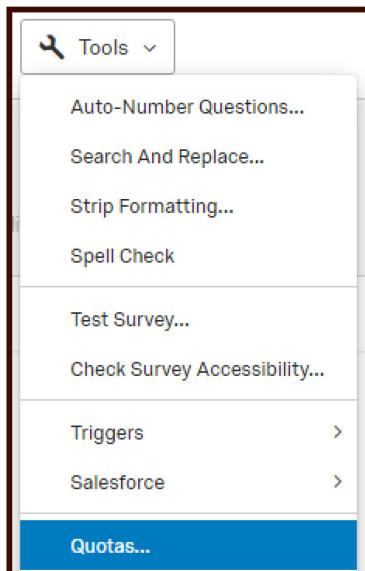
## Check Survey Accessibility



**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.



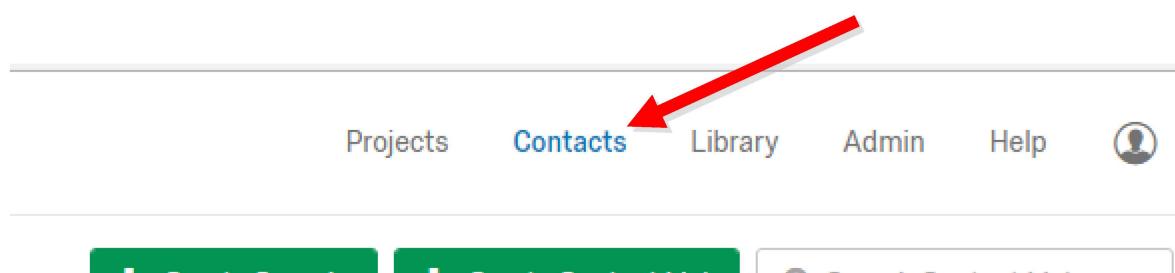
## Advanced Options

**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.

First_name	Last_name	email	course_name	Instructor
Jennifer	Savage	savagej@rowan.edu	Awesome_101	Hegel, Marybeth
Erica	King	kinge@rowan.edu	Awesome_101	Hegel, Marybeth
Sheena	Pierce	pierce28@rowan.edu	Awesome_101	Hegel, Marybeth

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



Name the Contact List and select Next.

### Create Contact List

Name

Folder

Cancel

Next >

# Advanced Options

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

Add Contacts

**Import From a File** Add Manually Import From a Survey

**Browse...** Reload Show Options

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

Skip this step Add Contacts

**Browse...** Reload Show Options

embedded\_info.csv 3 Contacts

Verify Fields

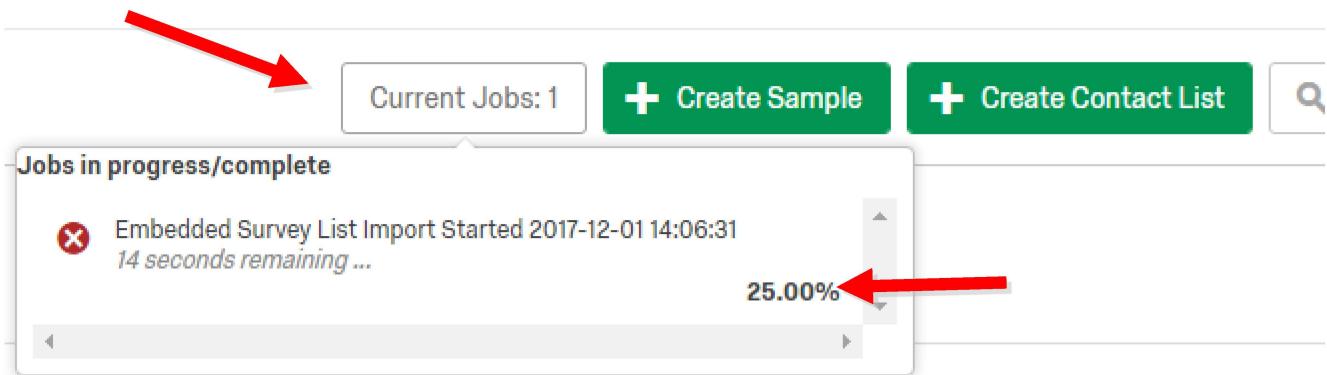
Fields	First Contact	Next Contact	Third Contact
First_name	Jennifer	Erica	Sheena
Last_name	Savage	King	Pierce
Email	savagej@rowan.edu	kinge@rowan.edu	pierce28@rowan.edu
course_name	Awesome_101	Awesome_101	Awesome_101
Instructor	Hegel, Marybeth	Hegel, Marybeth	Hegel, Marybeth

Skip this step Add Contacts

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.

A screenshot of the Survey Flow editor interface. At the top, there are tabs: 'Look & Feel', 'Survey Flow' (which is currently selected), 'Survey Options' (highlighted with a red arrow), and 'Tools'. Below the tabs, the title 'Survey Flow blank' is displayed. The main area shows a 'Show Block: Default Question Block (3 Questions)' element. At the bottom, there is a 'What do you want to add?' dialog box with options: 'Block', 'Branch', 'Embedded Data' (highlighted with a red arrow), 'Randomizer', 'Web Service', and 'Authenticator'. Below this dialog is a row of buttons: 'End of Survey' (red), 'Reference Survey', 'Conjoint', and 'Add a New Element Here'. Another 'Add a New Element Here' button is located at the very bottom.

# Advanced Options

Select Add from Contacts.

Show Block: Default Question Block (3 Questions)    Add Below    Move    Duplicate    Delete

Set Embedded Data:  
Enter Embedded Data Field Name Here... Value will be set from Panel or URL. Set a Value Now  
Add a New Field

Add Below    Move    Duplicate    Add From Contacts    Options    Delete

+ Add a New Element Here

## Import Contacts Embedded Data

Select a List of Contacts...

Please Select...

Click on Select a List of Contacts, Please Select.

## Import Contacts Embedded Data

Select a List of Contacts...

Please Select...

My Library: savagej Savage >

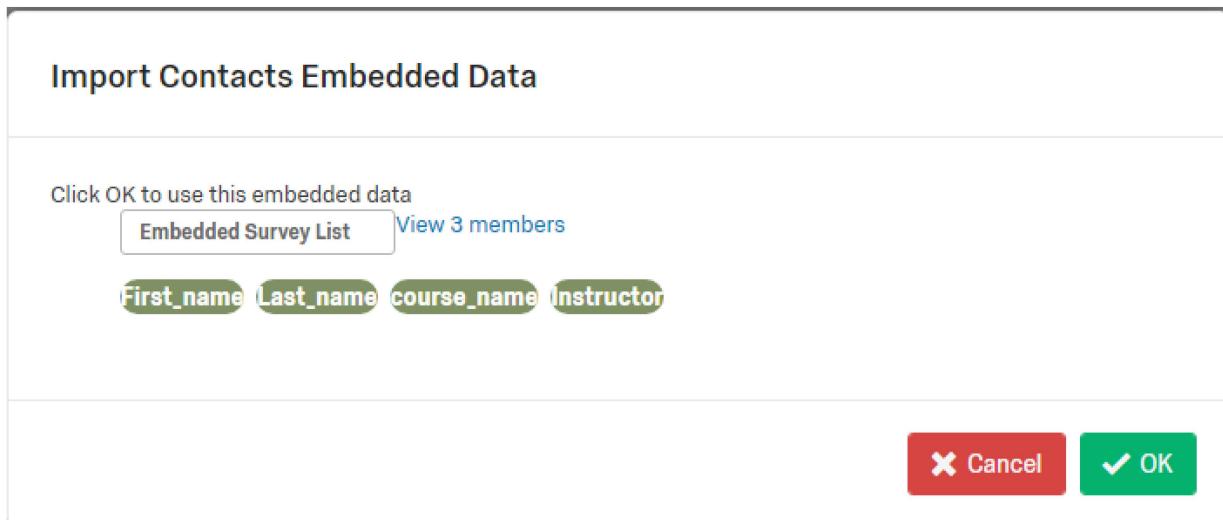
Organization Library: Rowan Universit >

- Search...
- Banner SS Finance 161115
  - Banner SS Finance 51716
  - Chart Class 4/11/16
  - Chart Class 4/15/2016
  - Embedded Survey List

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.

Survey Flow blank

The screenshot shows the Survey Flow editor with a 'Show Block: Default Question Block' block selected. Inside, a 'Set Embedded Data' block is open. It contains four fields: 'First\_name' (set to 'Custom Value'), 'Last\_name' (with a dropdown menu showing 'Insert Piped Text' and a sub-menu for 'Survey Question'), 'course\_name' (with a dropdown menu showing 'Set a Value Now'), and 'Instructor' (with a dropdown menu showing 'Set a Value Now'). A modal window is open over the 'Last\_name' field, titled 'Insert Piped Text'. It lists various options under 'Pipe text from a...' and shows a sub-menu for 'Embedded Data Field' with 'First\_name' selected and an 'Insert' button. Other options in the sub-menu include 'Web Service', 'GeoIP Location', 'Date / Time', 'Opt Out Link', 'Contacts Field', 'Loop & Merge', and 'Quota'. A red arrow points to the 'Move' button at the bottom of the flow editor's toolbar.

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.

The screenshot shows the 'Survey Options' dialog box for a 'blank' survey. At the top, there's a 'Partial Completion' section with dropdown menus for 'Record' (set to 'responses in progress'), '1 Week', and 'after respondent's last activity'. A note below says 'Please note, the recipient cannot continue taking the survey once their data is recorded or deleted.' In the bottom right corner are 'Close' and 'Save' buttons, with 'Save' being highlighted by a red arrow.

The screenshot shows the 'Survey Options' interface for a 'blank' survey. The 'Survey' tab is selected. A red arrow points to the 'Tools' dropdown menu icon. When opened, the menu shows options like 'Export & Import', 'Edit', and 'Tools'. The 'Delete Data' option is highlighted by a red arrow. The left sidebar lists survey-related items: Survey Previews..., Survey Tests..., Imported Data..., Offline Responses..., and All Responses... .

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.

## Advanced Options

The screenshot shows the Qualtrics survey editor interface. At the top, there is a 'blank' icon and a dropdown menu. Below the header, there are three tabs: 'Survey', 'Distributions' (which is underlined in blue and has a red arrow pointing to it), and 'Data & Analysis'. Under the 'Distributions' tab, there is a button labeled 'Pause Response Collection' with a circular icon. On the left side, there is a sidebar with four options: 'Distribution Summary', 'Anonymous Link', 'Emails' (which is highlighted with a blue bar), and 'Personal Links'. Each option has a corresponding icon.

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).

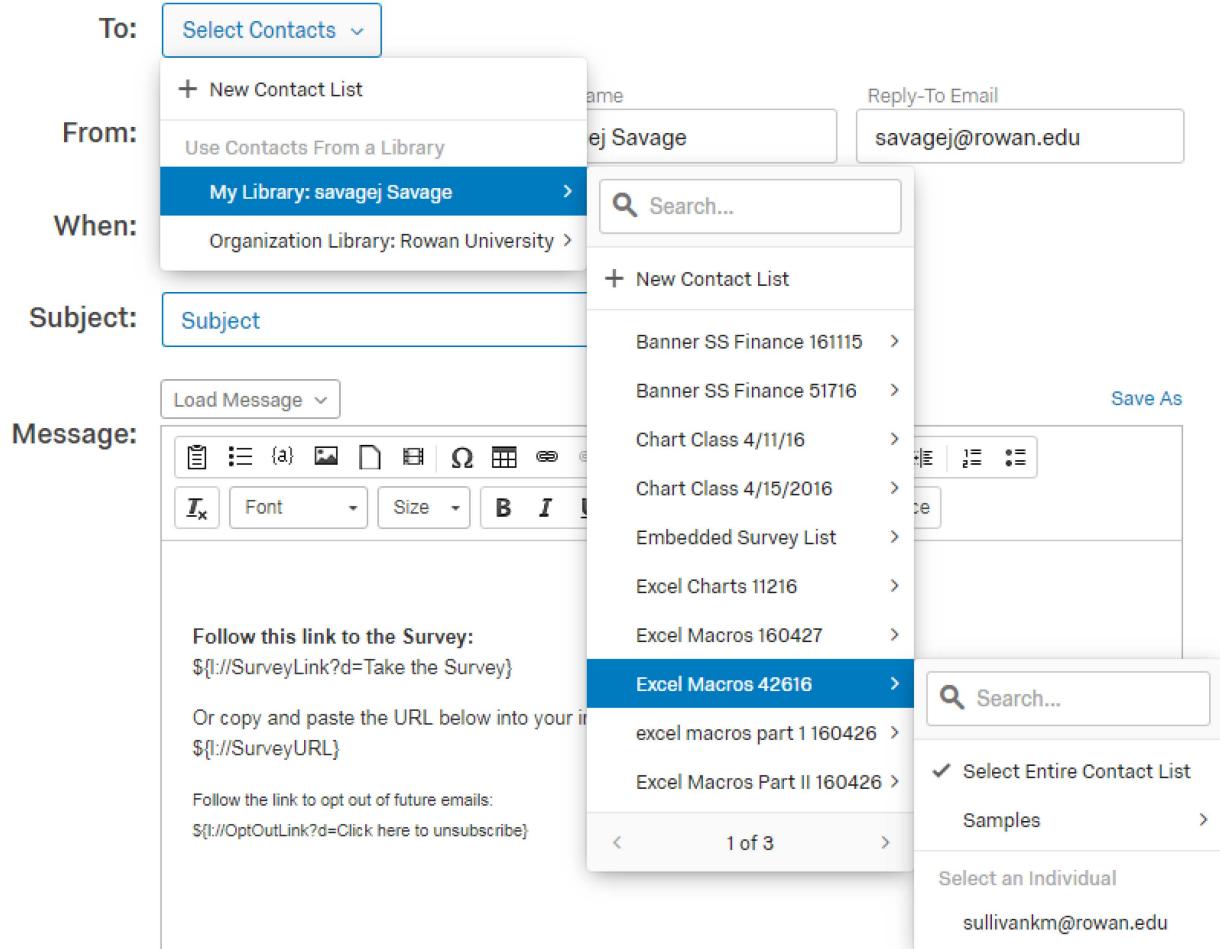
Select Compose Email.

Distribute your survey via email.

**Compose Email**

# Advanced Options

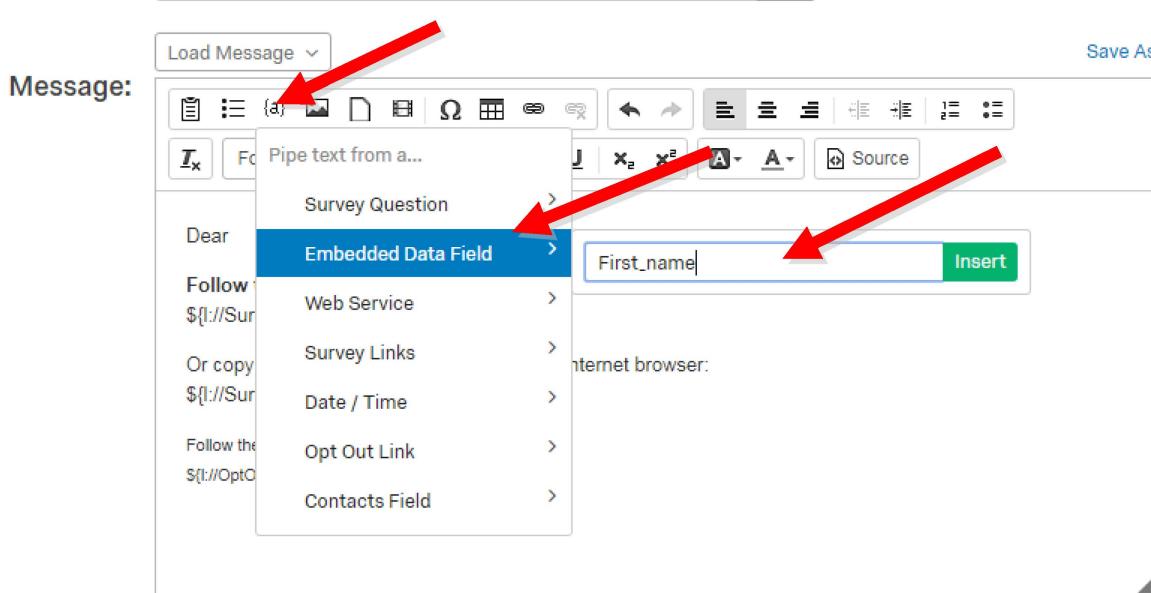
In the To field, Select Contacts then My Library. Hover over the contact list that you created, then either Select Entire Contact List or Samples.



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.

The screenshot shows the email message body. It contains the following text:  
Dear \${e://Field/First\_name}:  
We need your feedback on Course \${e://Field/Course\_name}. ←  
Please complete this survey as soon as you can. |  
Follow this link to the Survey:  
\${l://SurveyLink?d=Take the Survey}  
Or copy and paste the URL below into your internet browser:  
\${l://SurveyURL}  
Follow the link to opt out of future emails:  
\${l://OptOutLink?d=Click here to unsubscribe}

ptions

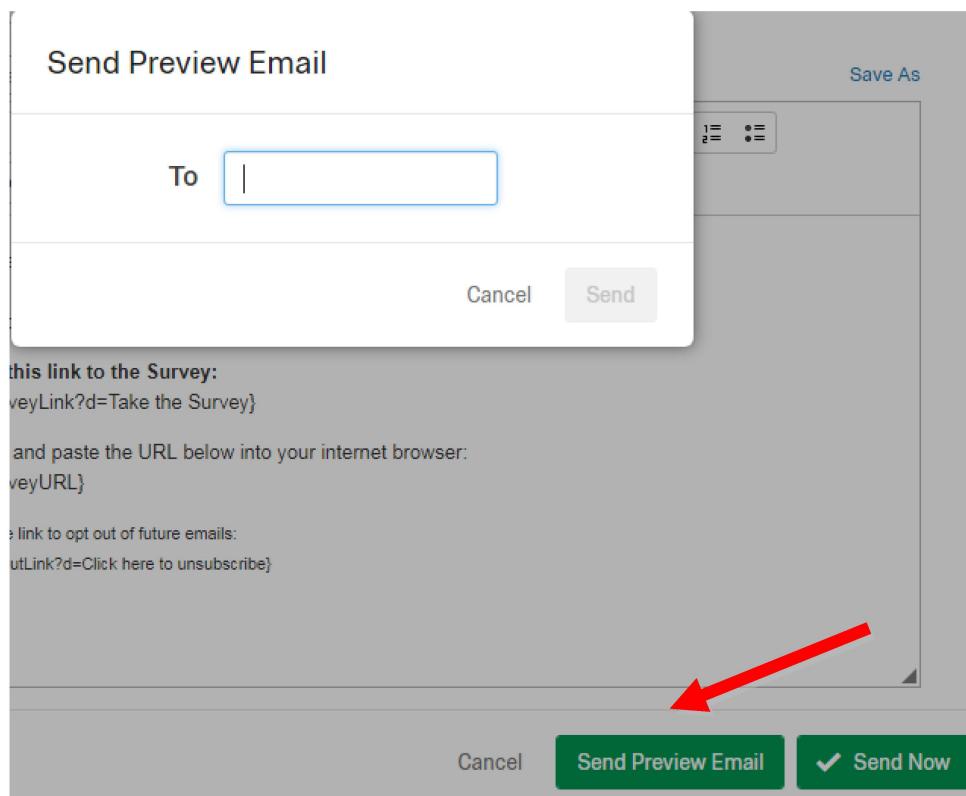
Cancel

Send Preview Email

✓ Send Now

## 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.

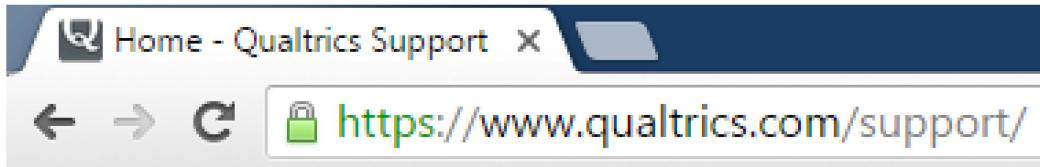
The screenshot shows an email editor interface with the following content:

Dear \${e://Field/First\_name}:  
We need your feedback on Course \${e://Field/Course\_name}.  
Please complete this survey as soon as you can. |  
**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}

Cancel Send Preview Email ✓ Send Now

# Helpful Resources

For free online training, open a web browser and go to [qualtrics.com/university](https://www.qualtrics.com/support/).



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.

This screenshot shows the "Webinars" section of the Qualtrics Support website. The main heading is "Webinars". Below it is a "WHAT'S ON THIS PAGE:" section with links to "Basic Building and Distributing Webinar", "Advanced Survey Building Webinar", "Reporting Webinar", and "What's New Webinar". Under "Basic Building and Distributing Webinar", there are two red buttons: "Register Here" and "Recorded Webinar". A "DATES:" section states "Mondays at 9:00 AM Mountain | 4:00 PM GMT". A "DURATION:" section states "45 minutes". A "DESCRIPTION:" section provides a brief overview of the webinar content. On the right side of the page, there is a sidebar with links to "Webinars", "Client Trainings", and "Programmer's Toolkit".

This screenshot shows the main Qualtrics Support homepage. The top navigation bar includes a search bar, a "SEARCH" button, and a "Login" button. The main content area features a "Welcome to Qualtrics Support" message and a "Survey Platform" section with various icons. On the right side, there is a sidebar with links to "Survey Platform", "Employee Insights", "Vocalize", "Site Intercept", "Target Audience", "Integrations", "Training Tools", and "Research Resources". A red arrow points to the "Training Tools" link. Below the main content area, there is a large graphic illustration featuring a clock, books, and a person working at a desk.

This screenshot shows the "Webinars" section of the Qualtrics Support website, similar to the one in the previous screenshot. It features a sidebar with links to "Webinars", "Client Trainings", and "Programmer's Toolkit". A red arrow points to the "Webinars" link in the sidebar.

## **Helpful Resources**

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**Foundations of Design Research with Andy Schwanbeck and Peni Acayo**  
<http://www.lynda.com/Design-Design-Foundations-tutorials/Foundations-Design-Research/182890-2.html?org=rowan.edu>

**Survey Basics, Qualtrics**

<http://www.qualtrics.com/university/researchsuite/research-resources/survey-basics/>

**Best Practices for Research, American Association for Public Opinion Research**  
<https://www.aapor.org/Standards-Ethics/Best-Practices.aspx>

Contact Qualtrics support at 1-800-340-9194