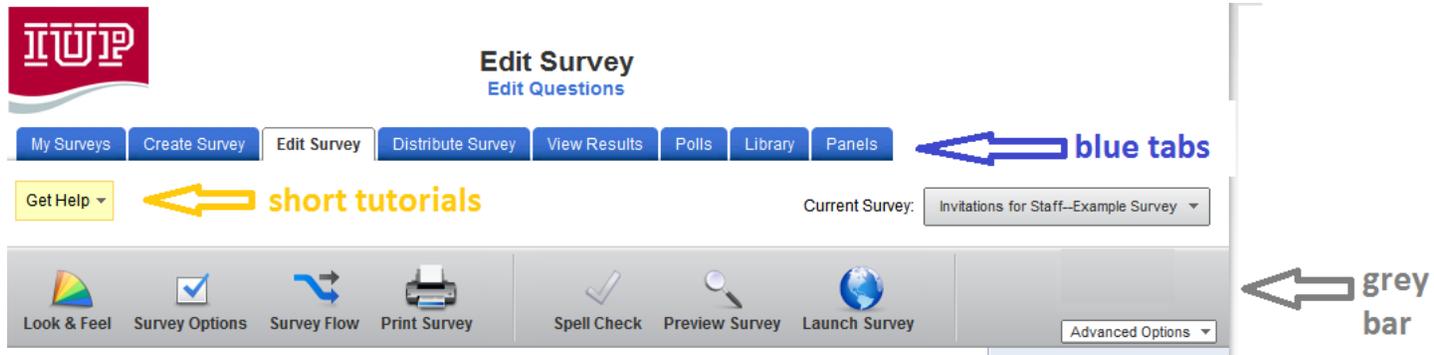


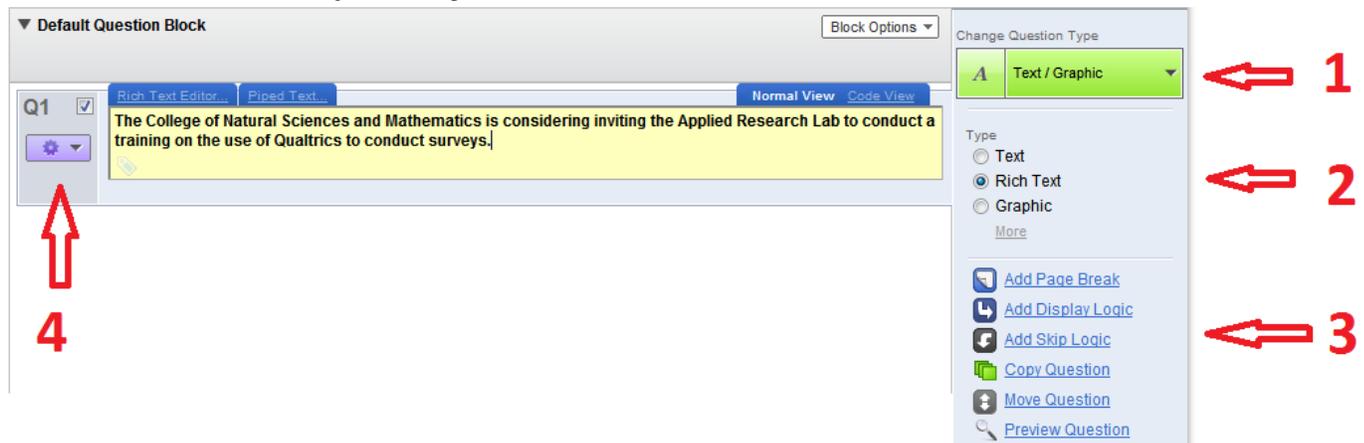
**Qualtrics Training for Staff and Managers**  
**Christoph Maier ARL Coordinator**  
**June 23, 2010 from 11 am – 12 pm**

**Part 1** [www.qualtrics.com](http://www.qualtrics.com)



**Part 2** **Creating and editing surveys: item # 1** Edit Survey

**Invitations for Staff--Example Survey**



Note	Description
← 1	<p><b>Question Type.</b></p>
← 2	Options that are relevant to this question type.
← 3	These options will appear for very question type.
↑ 4	Advanced Question Options

## Part 2 Creating and editing surveys: item # 2

The image shows a survey editor interface. On the left, a question block is displayed with the text "Would you be interested in attending a workshop on this subject?". Below the question are three radio button options: "Yes", "No", and "Maybe". A red asterisk icon is visible under the question number "Q2".

On the right, a configuration panel for a "Multiple Choice" question is shown. It includes the following settings:

- Choices:** A dropdown menu set to "Multiple Choice", a minus sign, a text box containing "3", and a plus sign with the text "Edit Multiple".
- Automatic Choices:** A checkbox that is currently unchecked.
- Answers:** Radio buttons for "Single Answer" (selected) and "Multiple Answer", with a "More" link below.
- Position:** Radio buttons for "Vertical" and "Horizontal" (selected), with a "More" link below.
- Label Position:** Radio buttons for "Below" (selected) and "Side".
- Validation Options:** A checkbox for "Force Response" which is checked.

Red arrows and numbers 1 through 6 point to these configuration elements. Additionally, numbers 7, 8, and 9 point to buttons at the bottom of the question block: a top green plus button (7), a red asterisk button (8), and a bottom green plus button (9).

Note	Description
← 1	Question Type
← 2	Number of "answers".
← 3	Single Answer : respondent can only select one choice.
← 4	Display responses across the page (horizontally) or down the page (vertically). Can also put them in columns by clicking on <u>More</u> .
← 5	Position of response labels with respect to the radio button.
← 6	Force response requires the user to answer the question before they move on to the next page. The red box  under the item number indicates that the respondent is being forced to answer.
7	Top green button: Add question before this question. Red button: delete this item Bottom green button: Add question after this question.
8	Add question after this question.
9	Add a new block below this question.

## Part 2 Creating and editing surveys: item # 3

The screenshot shows a survey editor interface. At the top, there is a 'Block 1' header with a 'Block Options' dropdown menu. Below this, a question 'Q3' is displayed with the text 'Please provide the following contact information:'. The question contains five form fields: 'First Name', 'Last Name', 'Email Address', 'Phone Number', and 'Department'. A link 'Click here to edit form fields' is located below the fields. To the right of the question is a 'Change Question Type' panel. This panel has a 'Text Entry' dropdown menu, a 'Form Fields' section with a minus sign, the number '5', and a plus sign followed by 'Edit Multiple', and an 'Automatic Form Fields' checkbox. Below that is a 'Text Type' section with radio buttons for 'Single Line', 'Multi Line', 'Essay Text Box', 'Form' (which is selected), and 'Password'. At the bottom of the panel is a 'Validation Options' section with a checked 'Force Response' checkbox. Red arrows with numbers 1 through 6 point to these specific elements.

Note	Description
← 1	Question Type
← 2	Number of fields.
← 3	Very important to combine use the form type and combine these 5 fields into one question rather than in 5 separate questions, so that when you reviewing the results, you each respondent's information together.
← 4	<p>Edit properties of the form fields:</p> <p>Back to preview mode</p>
← 5	Questions can be organized into blocks. Blocks can be named. This is especially helpful when sections of questions are only intended for some of the respondents. See survey flow.
6	Block Options. For now, you can ignore these.

## Part 2 Creating and editing surveys: item # 4

3 statements

Q4  Let's consider topics that could be included in the workshop. For each topic, indicate how useful you feel the topic would be for you.

4 scale points

	Very Useless	Useless	Useful	Very Useful
Writing a survey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sending out the survey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Assessing the results of the survey	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Matrix Table

Statements  
3  Edit Multiple  
 Automatic Statements

Scale Points  
4  Edit Multiple  
 Automatic Scale Points

Matrix Type  
 Likert  
 Bipolar  
More

## Part 2 Creating and editing surveys: item # 5

Q5  Here are five possible time slots when we could conduct the workshop. Place a number in a box if you are available during the corresponding time slot. The number represents your preference for the time slot, where 1 represents your top choice, 2 represents your second preference,.... Leave the box blank if you are not available during the corresponding timer slot.

5 items

Mondays 8-9  
 Tuesdays 11-12  
 Tuesdays 3-4  
 Wednesday 4-5  
 Thursday 3-4

Rank Order

Items  
5  Edit Multiple  
 Automatic Items

Type  
 Drag and Drop  
 Radio Buttons  
 Text Box  
More

Position  
 Vertical  
 Horizontal

Validation Options  
 Force Response

Validation Type  
 None  
 Must Rank All  
 Must Rank Between

Must Rank At Least  
0

And No More Than  
5

## Part 2 Creating and editing surveys: survey flow

**Survey Flow** Invitations for Staff--Example Survey Make Smaller Make Bigger

**Show Block: Default Question Block** (2 Questions) Add Below Move Delete

**Then Branch If:**  
If Would you be interested in attending a workshop on this s... **No** Is **Not Selected** Edit Condition  
Move Options Collapse Delete

**Show Block: Block 1** (3 Questions) Add Below

**End of Survey** Move Customize Delete

[+ Add a New Element Here](#)

**Then Branch If:**  
If Question Q2 Would you be i... No Is Selected - +  
OK

**End of Survey** Move Customize Delete

[+ Add a New Element Here](#)

[+ Add a New Element Here](#)

Cancel Save Flow

### Customize End Of Survey

- Default end of survey message.
- End of survey message from the Library...  
Library: My Library: Christoph Mai End Of Survey Message: Staff Training--Not interest [New Message](#)
- Redirect to a URL ...
- Send additional thank you email from the library...
- Do not increment quota counts.
- Do not record survey response (not recommended).
- Show Response Summary

OK

## Edit a Message

Category

Description

Thank you for letting us know that you are not interested in this workshop. Please let us know if you change your mind.

Christoph Maier  
 ARL coordinator  
[iup-arl@iup.edu](mailto:iup-arl@iup.edu)  
 724-357-4530

### Part 3 Panels Setting up the email panel

Can send out surveys through

- email and put the survey link in the message,
- Qualtrics using a panel of email addresses.

**Panels**

My Panels: IUP ARL Coordinator

Email addresses can be loaded into a panel:

- By uploading an Excel comma-delimited file (.csv)  
 . Note: first cell in the column contains the variable names: FirstName, LastName, PrimaryEmail.

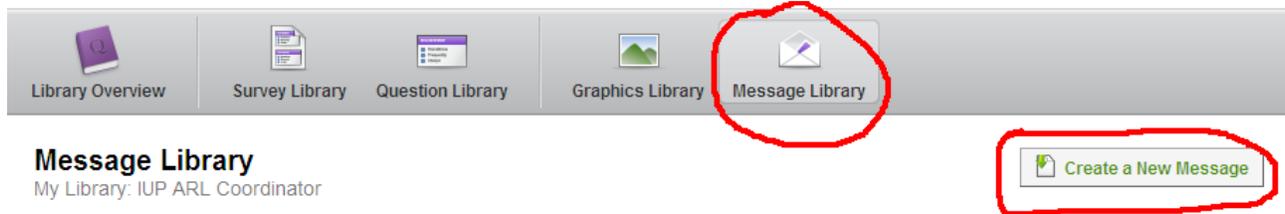
or

- By copying the email addresses from a column in Excel or from Word where each is on a separate line and pasting addresses into the panel. Note: Click on the top cell, before pasting.

[Create a test panel with your email, so that you can test the sending out of your survey.](#)

## Part 4 Library Setting up the email messages

Create your invite message, then copy as a reminder message. Also create the end-of-survey messages.



When you click on the “Create a New Message” button, you will see:

**Follow this link to the Survey:**

**\${!://SurveyLink?d=Take the Survey}**

Or copy and paste the URL below into your internet browser:

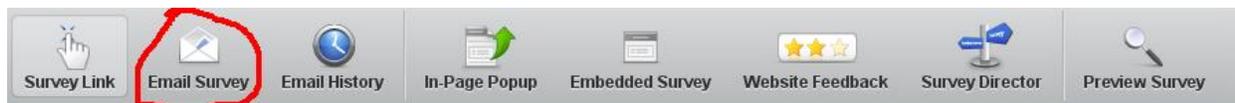
**\${!://SurveyURL}**

Follow the link to opt out of future emails:

**\${!://OptOutLink}**

**Do not change the parts that are colored in red!**

## Part 5 Distribute Survey Sending out the message



### Staff Training Create Account

Quick Send **Survey Mailer**

**When to send email(s)**  
1 Send Now

**Who to send to**  
2  Panel  Panel Sample  Individual  Email Address  
Library: IUP ARL Coordinator Panel: Staff Training Participants

**Email Message**  
From Name: IUP ARL Coordinator  
From Email Address: iup-arl@iup.edu  
Subject: Qualtrics Training--Information on Qualtrics Account 3

Message From Library  Create a Message  
Library: IUP ARL Coordinator Message: Tasks for Qualtrics Trainir 4

Click Here to Edit

Dear \${m://FirstName} \${m://LastName}

Thank you for signing up for the Qualtrics Workshop which is scheduled for Wednesday, June 23, 2010 from 11-12.

If you have a Qualtrics account, this is your username: \${e://Field/AccountName}

5  Schedule Mailing

# Part 6

View Results

# Looking at Results

Initial Report New Report 3 Copy Report 5 Public Report... 6 Export Report

Show Filters... 2 Drill Down... Report Options

Questions 1 + Add a Subgroup to This Report... 4

1. Would you be interested in attending a workshop on this subject?  
 2. Please provide the following contact information:  
 3. Let's consider topics that could be included in the workshop. For each topic, indicate how useful yo...  
 4. Here are five possible time slots when we could conduct the workshop. Place a number in a box if you...

1. Would you be interested in attending a workshop on this subject? Add Graph Add Table More...

#	Answer	Response	%
1	Yes	10	31%
2	No	14	44%
3	Maybe	8	25%
Total		32	100%

2. Please provide the following contact information: Add Graph Add Table More...

First Name	Last Name	Email Address	Phone Number	Department
Dan	Streams	dan.streams@iup.edu	724-357-0101	Mathematics
Ann	Moon	ann.moon@iup.edu	724-357-2021	Chemistry

3. Let's consider topics that could be included in the workshop. For each topic, indicate how useful you feel the topic would be for you. Add Graph Add Table More...

#	Question	Very Useless	Useless	Useful	Very Useful	Responses	Mean
1	Writing a survey	5	2	4	6	17	2.65
2	Sending out the survey	6	6	4	1	17	2.00
3	Assessing the results of the survey	6	3	5	3	17	2.29

4. Here are five possible time slots when we could conduct the workshop. Place a number in a box if you are available during the corresponding time slot. The number represents your preference for the time slot, where 1 represents your top choice, 2 represents your second preference,.... Leave the box blank if you are not available during the corresponding timer slot.

#	Answer	1	2	3	4	5	Responses
1	<a href="#">Mondays 8-9</a>	4	2	3	0	1	10
2	<a href="#">Tuesdays 11-12</a>	3	3	3	1	0	10
3	<a href="#">Tuesdays 3-4</a>	1	5	0	5	1	12
4	<a href="#">Wednesday 4-5</a>	2	0	4	4	1	11
5	<a href="#">Thursday 3-4</a>	5	2	2	0	1	10
Total		15	12	12	10	4	

Show Filters... **Drill Down...** Show Style Editor

Previous Page Next Page

1. Would you be interested in attending a workshop on this subject?  
 2. Please provide the following contact information:  
 3. Let's consider topics that could be included in the workshop. For each topic, indicate how useful you...  
 4. Here are five possible time slots when we could conduct the workshop. Place a number in a box if you...

3. Let's consider topics that could be included in the workshop. For each topic, indicate how useful you feel the topic would be for you.

Add Graph Add Table More...

		<b>Yes</b>			
#	Question	Very Useless	Useless	Useful	Very Useful
1	Writing a survey	1	2	2	4
2	Sending out the survey	2	4	2	1
3	Assessing the results of the survey	3	1	2	3

		<b>No</b>			
#	Question	Very Useless	Useless	Useful	Very Useful
1	Writing a survey	0	0	0	0
2	Sending out the survey	0	0	0	0
3	Assessing the results of the survey	0	0	0	0

		<b>Maybe</b>			
#	Question	Very Useless	Useless	Useful	Very Useful
1	Writing a survey	4	0	2	2
2	Sending out the survey	4	2	2	0
3	Assessing the results of the survey	3	2	3	0

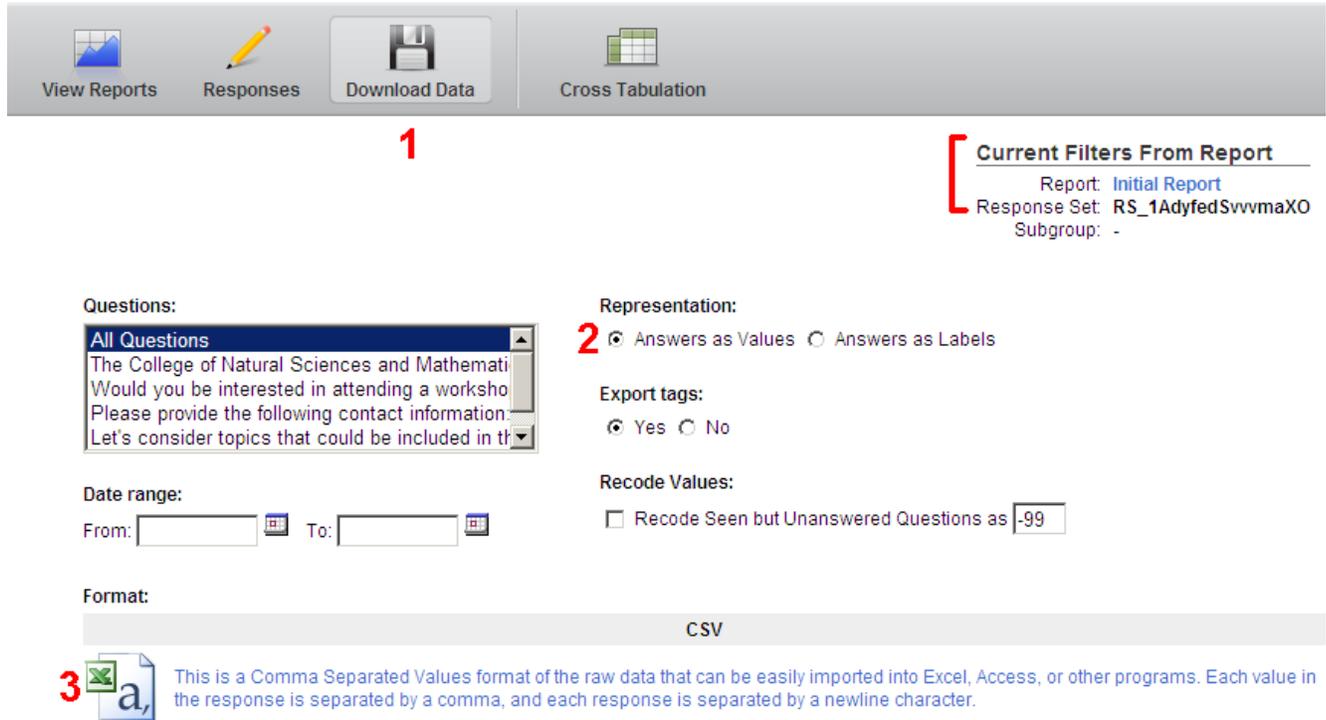
break-down of responses on Q4 for those who said "yes" on Q2. (are interested)

## Part 6

[View Results](#)

## Downloading to Excel

Be sure to undo any filtering commands before you download, unless you only want the subset.



**1**

**Current Filters From Report**  
Report: [Initial Report](#)  
Response Set: [RS\\_1AdyfedSwvmaXO](#)  
Subgroup: -

**Questions:**  
All Questions  
The College of Natural Sciences and Mathemat  
Would you be interested in attending a worksho  
Please provide the following contact information:  
Let's consider topics that could be included in th

**Representation:**  
**2**  Answers as Values  Answers as Labels

**Export tags:**  
 Yes  No

**Recode Values:**  
 Recode Seen but Unanswered Questions as

**Format:**  
CSV

**3**  This is a Comma Separated Values format of the raw data that can be easily imported into Excel, Access, or other programs. Each value in the response is separated by a comma, and each response is separated by a newline character.

**FINAL WARNING: Qualtrics immediately saves your changes to survey questions and there is no “undo” button. So, it might be a good idea to make a copy of your survey before you play around with it.**

## Part 7 Where You Can Get Help

### Applied Research Lab

Indiana University of Pennsylvania  
Donna D. Putt Hall Suite G10  
1000 Grant Street  
Indiana, PA 15705  
**Phone: 724-357-4530**  
Fax: 724-357-2890  
**Email: [iup-arl@iup.edu](mailto:iup-arl@iup.edu)**

### Directions (From the corner of Grant and 11<sup>th</sup>)

Walk south (downhill) on 11th street.  
Foster Dining hall will be on your right. Donna D Putt Hall will be on your left. At the end of Donna D. Putt Hall is a loading dock. Immediately after the loading dock is a walkway. Follow it along the building until you reach the third door, which has the ARL banner over it. Enter and follow the hallway around the corner to the ARL, which will be on your left-hand side.

Starting Summer II, the ARL coordinator will be Dr. Tim Nuttle.