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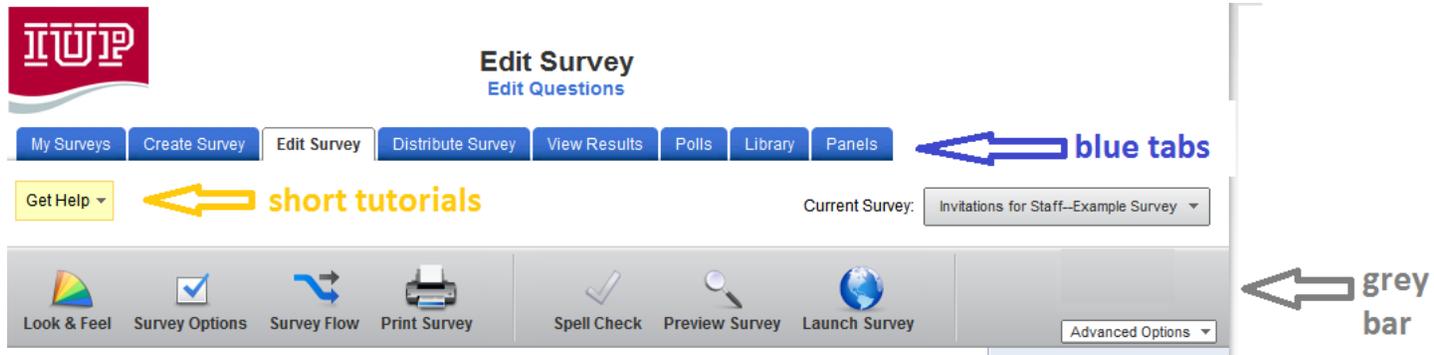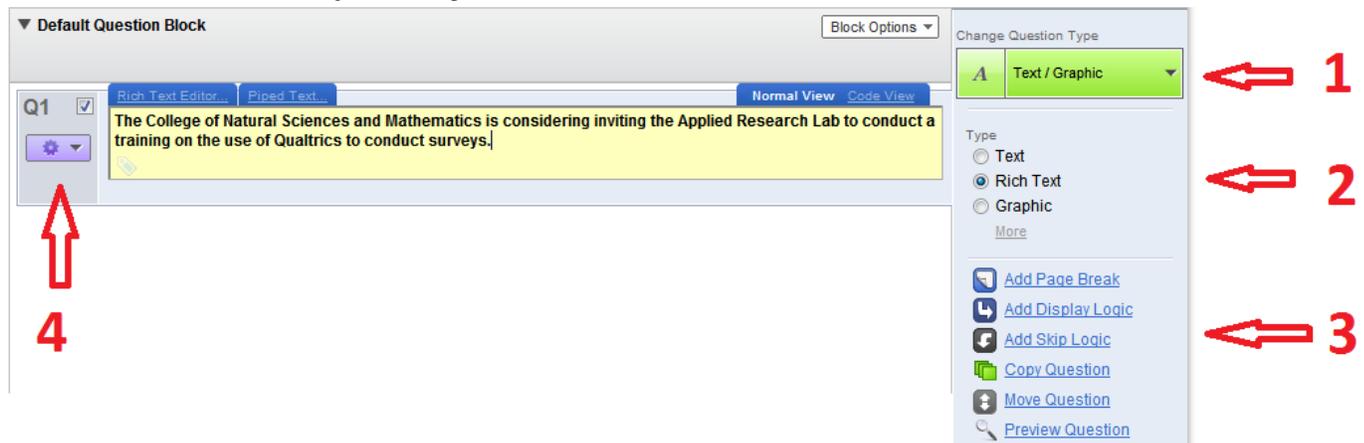## Christoph Maier ARL Coordinator
June 23, 2010 from 11 am – 12 pm

Part 1   www.qualtrics.com

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

Note	Description
⇐ 1	Question Type.
⇐ 2	Options that are relevant to this question type.
⇐ 3	These options will appear for very question type.
⇑ 4	Advanced Question Options

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

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	Edit properties of the form fields:
⇐ 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.

Matrix Table

Statements
3 Edit Multiple
Automatic Statements

Scale Points
4 Edit Multiple
Automatic Scale Points

Matrix Type
◉ Likert
○ Bipolar
More

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	○	○	○	○
Sending out the survey	○	○	○	○
Assessing the results of the survey	○	○	○	○

3 statements

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

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.

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

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 [End of Survey Messages ▼]

Description [Staff Training--Not interested]

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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
724-357-4530

[✖ Cancel] [✔ Save]

Part 3 [Panels]   Setting up the email panel

Can send out surveys through

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

Panels
My Panels: IUP ARL Coordinator   [⊕ Create New Panel]

Email addresses can be loaded into a panel:

- [⊕ Import/Update Panel Members]   By uploading an Excel comma-delimited file (.csv)
  . Note: first cell in the column contains the variable names: FirstName, LastName, PrimaryEmail.
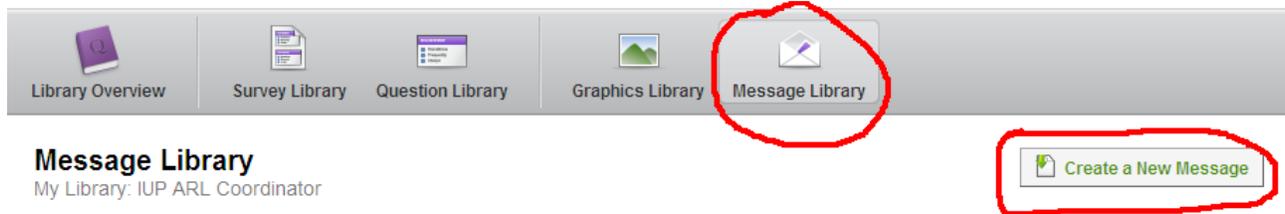
or

- [⊕ Add New Panel Members]   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.

| Library Overview | Survey Library | Question Library | Graphics Library | Message Library |

Message Library
My Library: IUP ARL Coordinator

Create a New Message

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

Follow this link to the Survey:
${l://SurveyLink?d=Take the Survey**}**

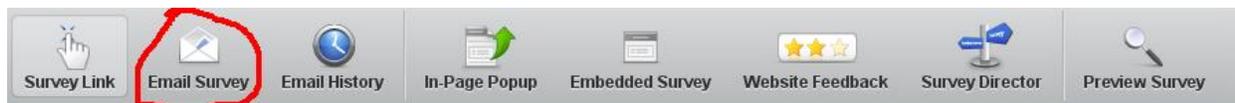Or copy and paste the URL below into your internet browser:
${l://SurveyURL}

Follow the link to opt out of future emails:
${l://OptOutLink}

Do not change the parts that are colored in red!

Part 5 | Distribute Survey | Sending out the message

| Survey Link | Email Survey | Email History | In-Page Popup | Embedded Survey | Website Feedback | Survey Director | Preview Survey |

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 | Public Report... **5** | Export Report **6** | W o X PDF

Show Filters... **2** Drill Down... | Report Options ▼

▼ Questions **1**

☑ 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...

⊕ Add a Subgroup to This Report... **4**

Show Style Editor

Next Page ➡

1. Would you be interested in attending a workshop on this subect?

Add Graph   Add Table   More... ▼

Table Options ▼ | ✖

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

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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

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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	Mondays 8-9	4	2	3	0	1	10
2	Tuesdays 11-12	3	3	3	1	0	10
3	Tuesdays 3-4	1	5	0	5	1	12
4	Wednesday 4-5	2	0	4	4	1	11
5	Thursday 3-4	5	2	2	0	1	10
	Total	15	12	12	10	4	

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

▼ Questions

☑ **1.** Would you be interested in attending a workshop on this subect?

☑ **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...

⬅ Previous Page   Next Page ➡

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... ▼

Yes				
#	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

No				
#	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

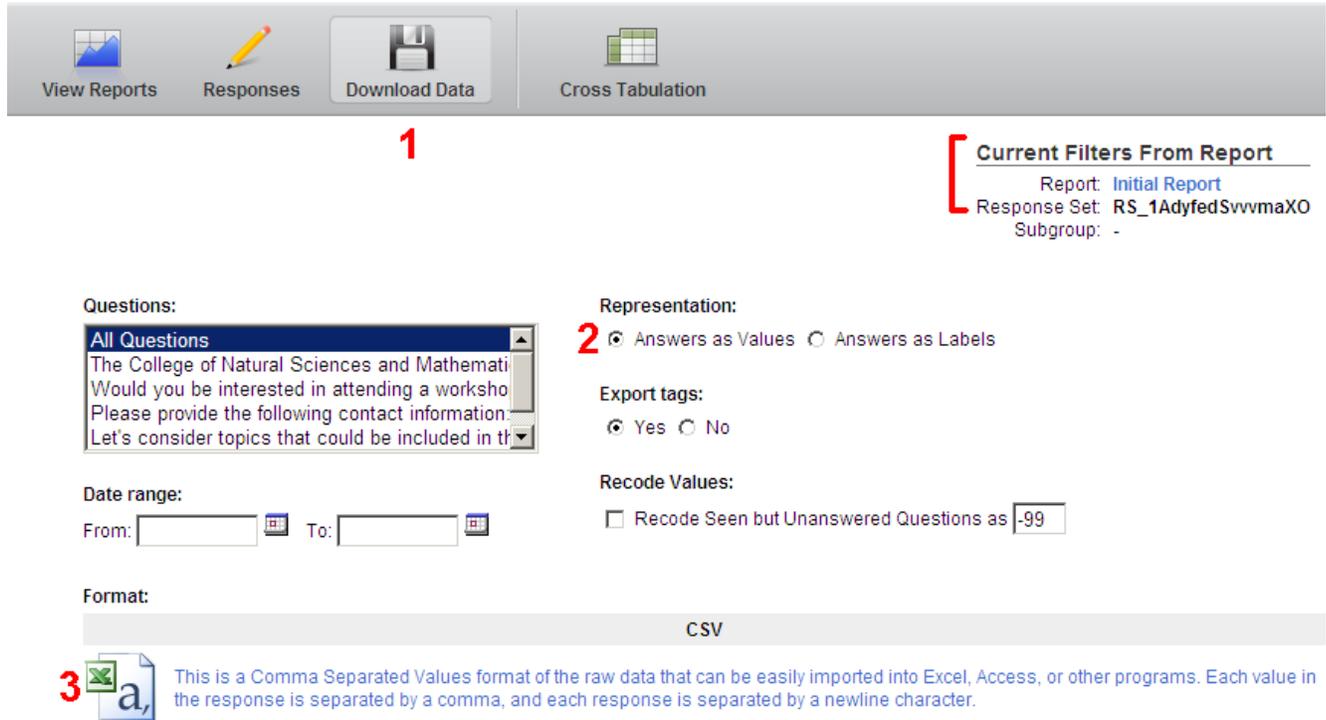| Maybe				
#	Question	Very Useless	Useless	Useful	Very Useful
1	Writing a survey	4	0	2	2
2	Sending out the survey	4	2	2	0
3	Assessing the results of the survey	3	2	3	0

break-down of responses on Q4 , for those hwo 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.

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	**Directions (**From the corner of Grant and 11th)
Indiana University of Pennsylvania	Walk south (downhill) on 11th street.
Donna D. Putt Hall Suite G10	Foster Dining hall will be on your right. Donna
1000 Grant Street	D Putt Hall will be on your left. At the end of
Indiana, PA 15705	Donna D. Putt Hall is a loading dock.
Phone: 724-357-4530	Immediately after the loading dock is a
Fax: 724-357-2890	walkway. Follow it along the building until you
Email: iup-arl@iup.edu	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.