

# Using Qualtrics to Create Surveys



AUBURN

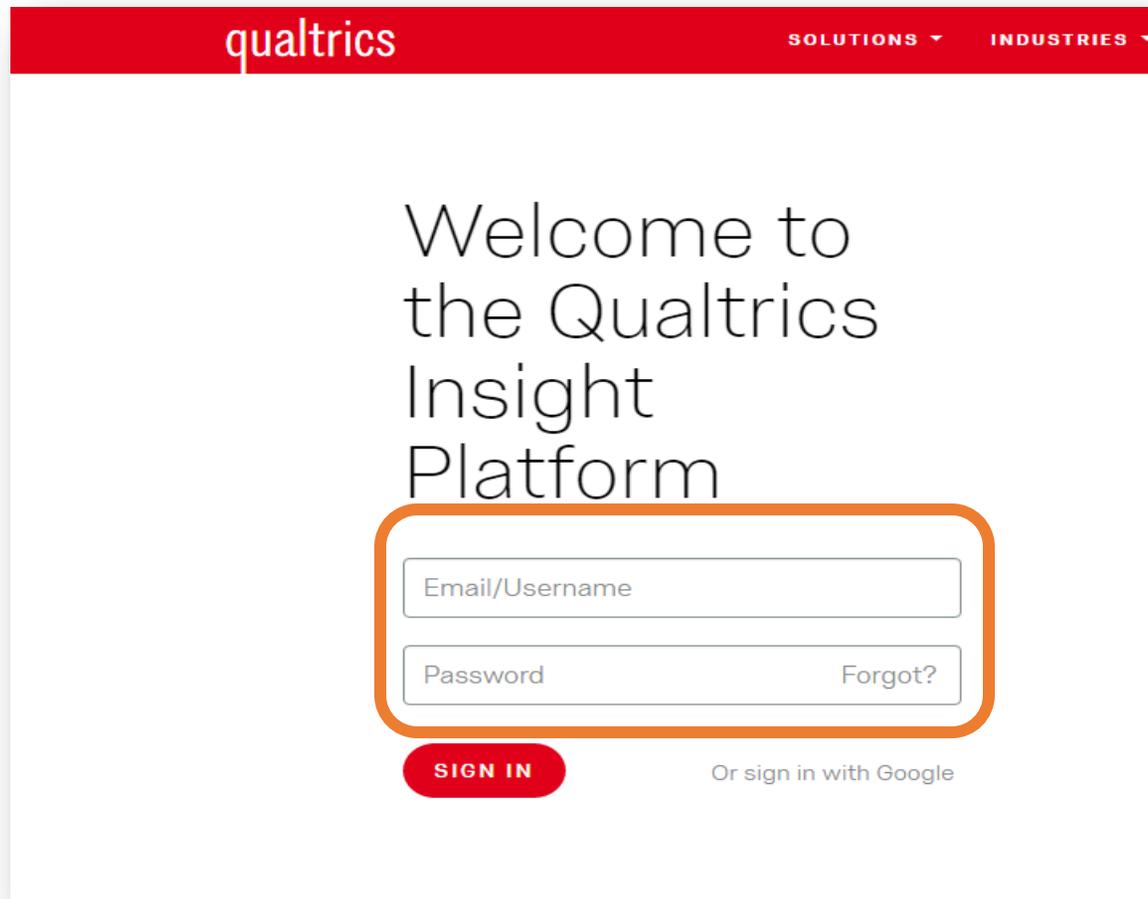
MONTGOMERY

OFFICE OF  
INSTITUTIONAL  
EFFECTIVENESS

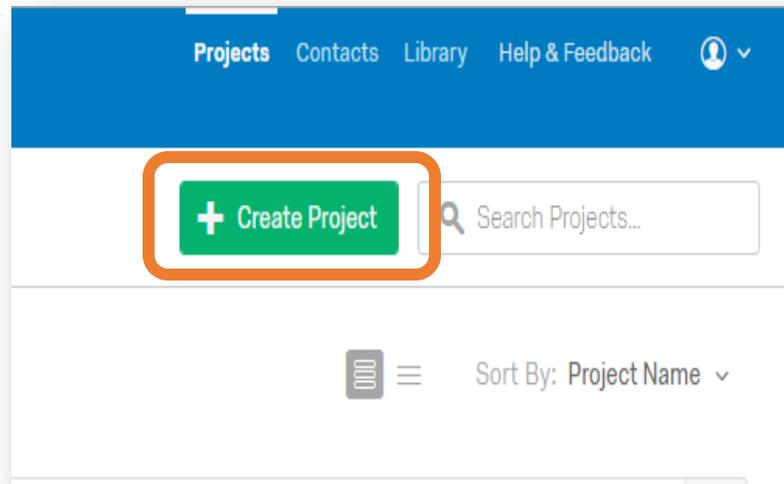
# Table of Contents

<b>Accessing <i>Qualtrics</i></b> .....	<b>2</b>
<b>Create Survey Project</b> .....	<b>3</b>
<b>Choosing Survey Options</b> .....	<b>5</b>
<b>Creating a Folder for your Survey Project</b> .....	<b>7</b>
<b>Adding Questions to your Survey</b> .....	<b>11</b>
<b>Previewing your Survey</b> .....	<b>16</b>
<b>Creating and Uploading Contact List to <i>Qualtrics</i></b> .....	<b>19</b>
<b>Adding Embedded Data through the Survey Flow</b> .....	<b>25</b>
<b>Distribution of your Survey: Initial Invitation and Reminders</b> .....	<b>27</b>
<b>Downloading your Survey Data</b> .....	<b>32</b>

**Need Assistance?**  
**Contact Justin Chandler**  
**Office of Institutional Effectiveness**  
**334-244-3918--- [jchandl7@aum.edu](mailto:jchandl7@aum.edu)**



Go to <http://www.qualtrics.com/login/> into your web browser and enter your login in credentials.



**Click on “Create Project” at the right side of your screen to create a new survey.**

### Create a Project

**New Project**

Create From Existing

- From a Copy
- From a Library
- From a File

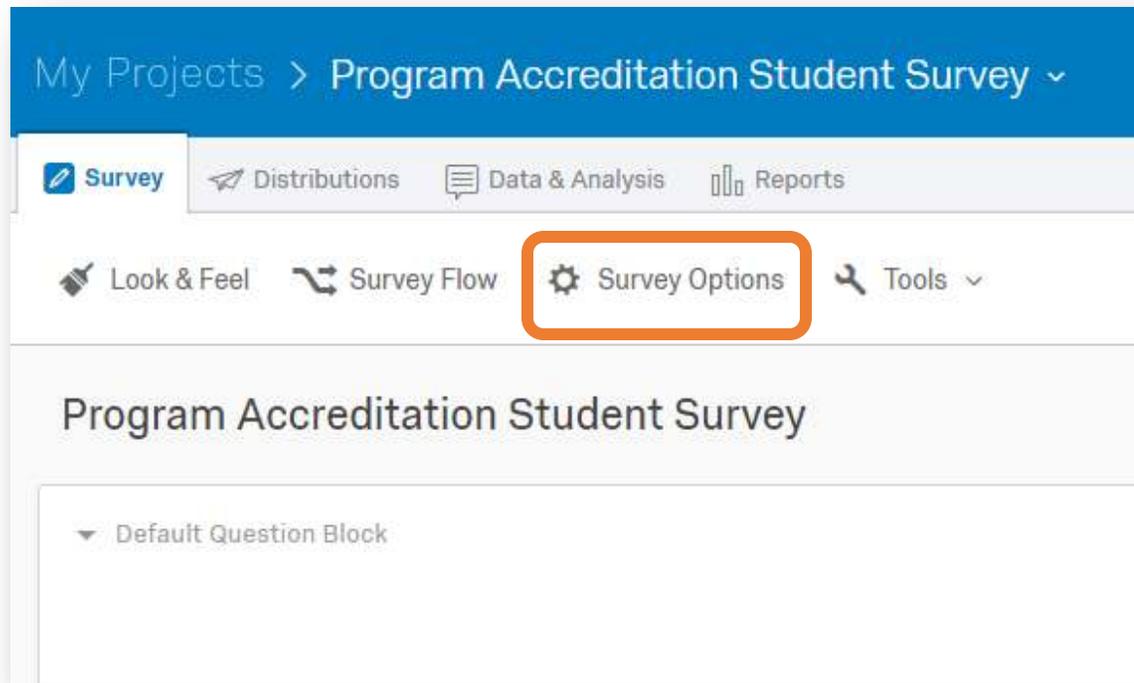
#### Create a Project from Scratch

Project Name

Folder

Cancel **Create Project**

**Give your survey a name in the “Project Name Field” and click on “Create Project” to begin adding questions to your survey.**



**Click on “Survey Options” to set settings for the delivery of your survey.**

**Survey Options**

**Survey Experience**

- Back Button.** Enable respondents to change their responses. Back Button is not available across branches. [More Info](#)
- 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:  The language the survey is written in.

Survey Title:  This text will appear in the browser as the window or tab title.

Meta Description:  Search engines and social media services use this description.

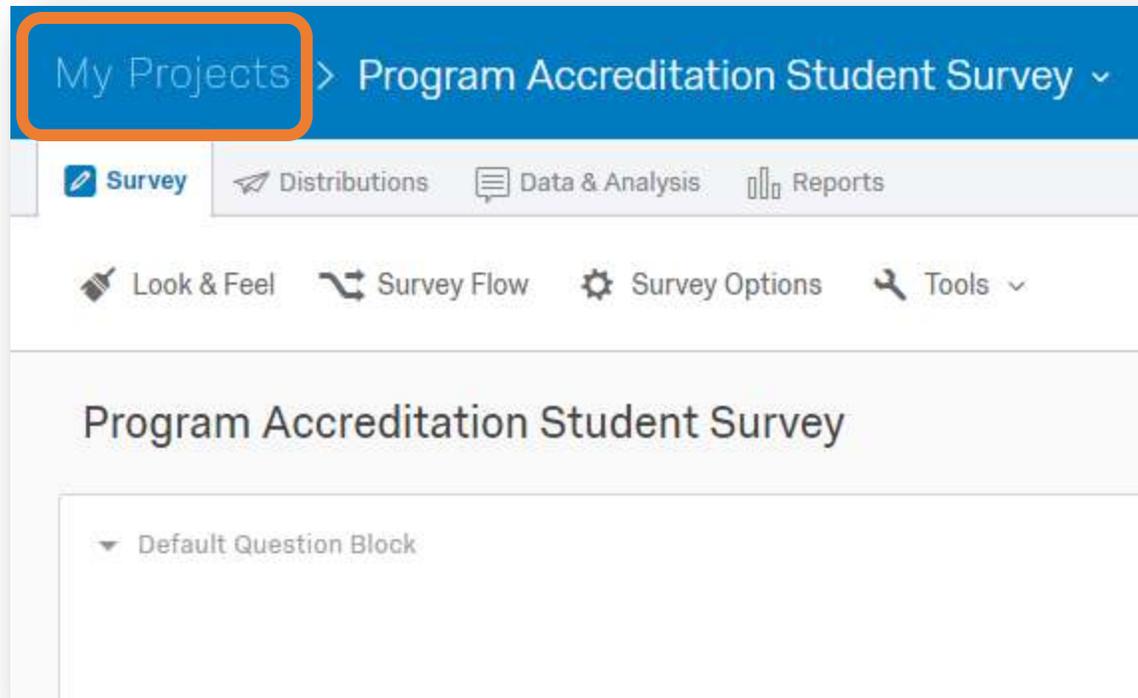
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**Survey Protection**

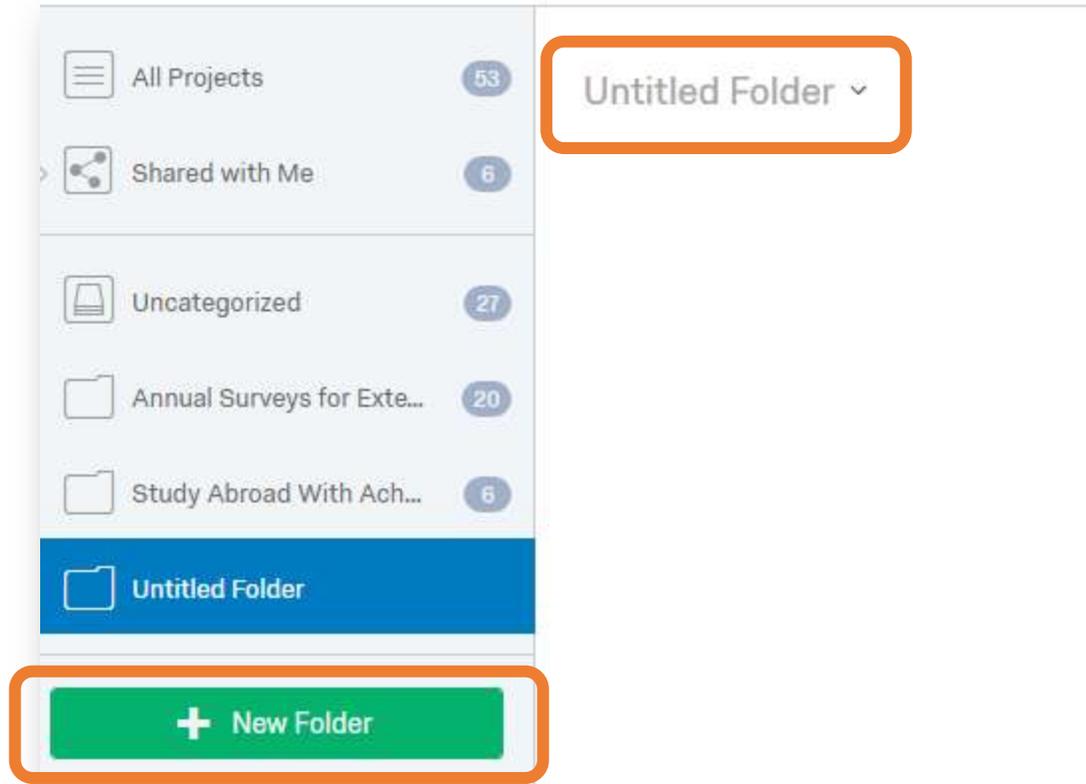
- Open Access.** Allow anyone to take this survey.
- By Invitation Only.** Prevent people from taking the survey using an anonymous survey link.
- Password Protection.** This password must be entered to take this survey:
- Prevent Ballot Box Stuffing.** Keep people from taking this survey more than once.
- HTTP Referrer 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.

**You will want to check the boxes for the following “Survey Options”:**

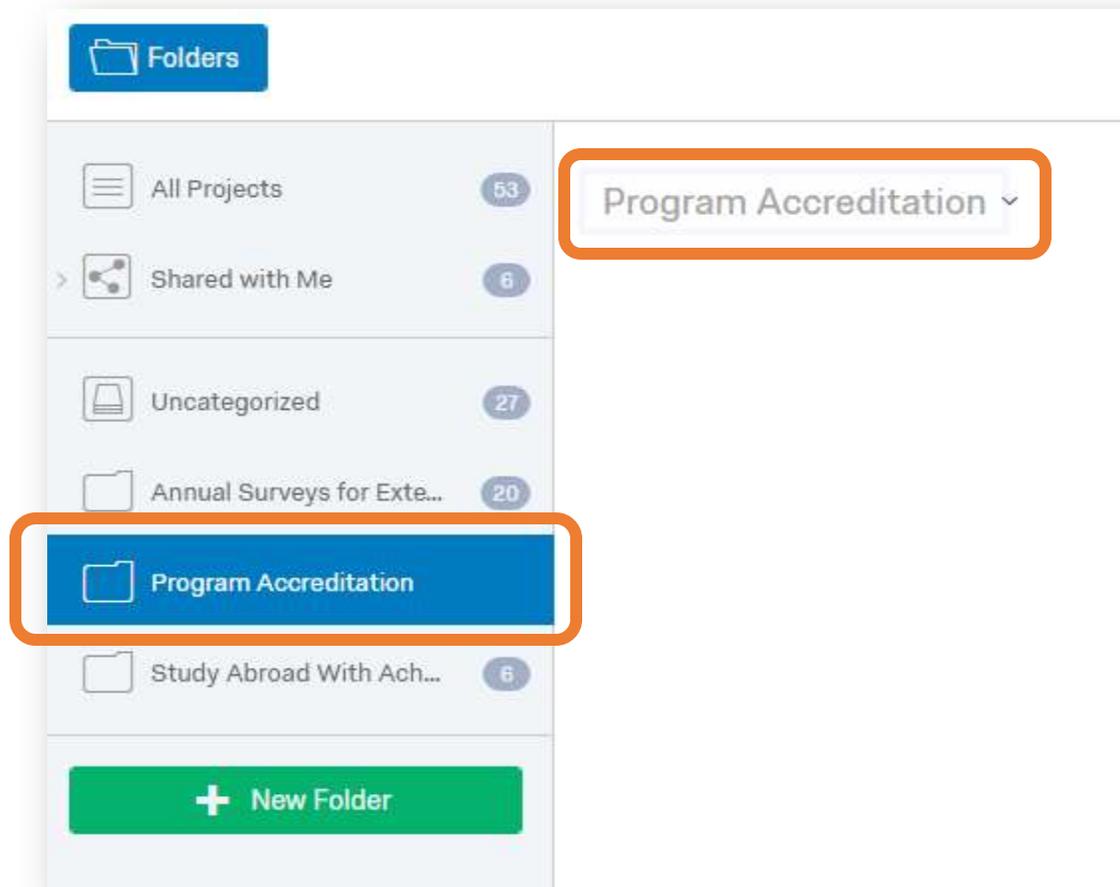
- **Back Button**
- **Save and Continue**
- **By Invitation Only**
- **Prevent Ballot Box Stuffing**
- **Prevent Indexing**
- **Secure Participants' Files**
- **Redirect: <http://www.aum.edu>**
- **Default inactive survey message.**
- **Partial Completion: After 6 Months**



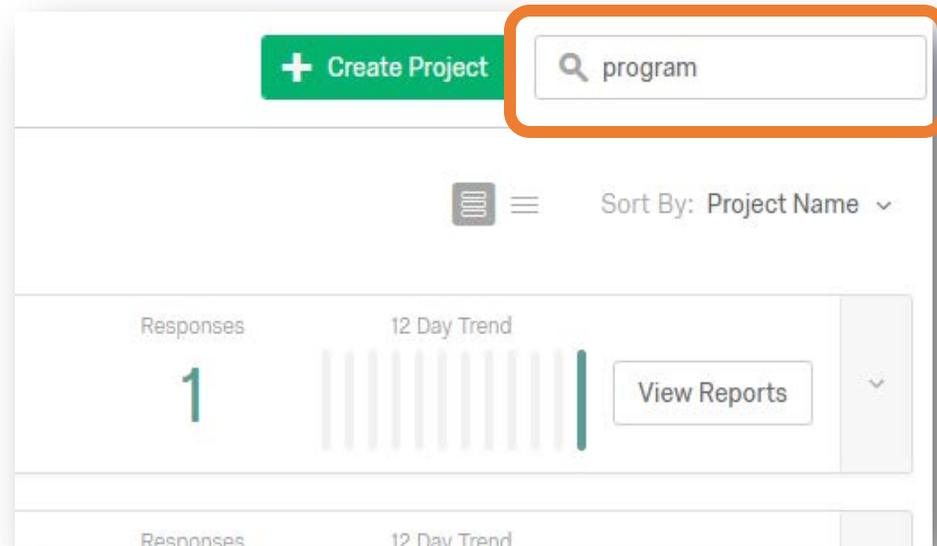
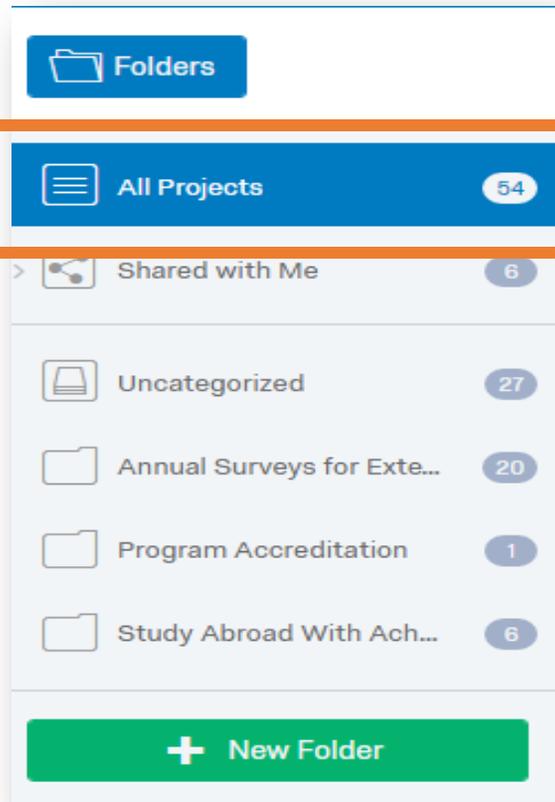
**You will want to create a folder to place your new survey. Click on “My Projects” which will bring you back to your home screen.**



**Click on “New Folder” and “Untitled Folder” will appear. Type in the box with the gray lettering and give your folder a title.**



**The name of the folder will now appear on the menu folder.**



**Click on “All Projects”. A list of all projects will appear. Go to the right hand corner and search for your survey with a key word. In this case, the word “program” is useful to pull up the “Program Accreditation Survey”.**

## Program Accreditation Student Survey

▼ Default Question Block

Q1 Click to write the question text

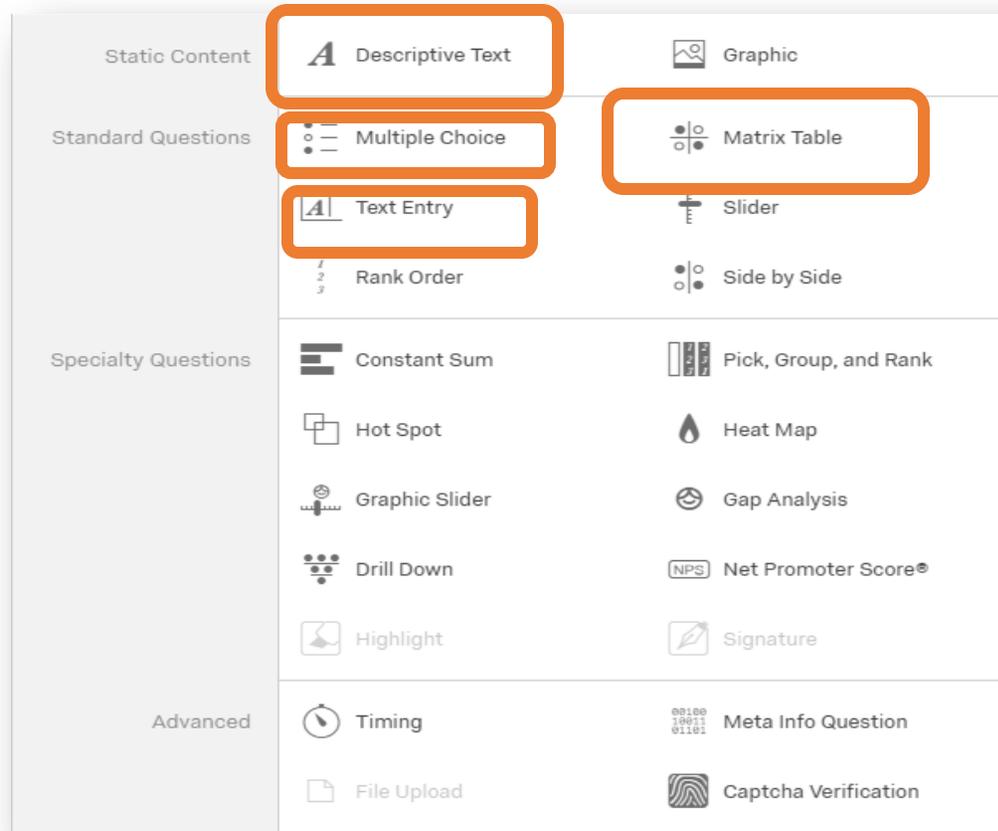


Import Questions From...

+ Create a New Question



**The first question text should give a brief description of the survey’s purpose and can include general instructions about the survey. You will want to select “Create a New Question” and then select “Descriptive Text”.**



**Multiple choice, matrix table, and text entry are common question types utilized in most surveys. For more information about how to create good survey questions and how to create a plan for your survey, please go to the following website:**

**[https://oqi.wisc.edu/resource-library/uploads/resources/Survey\\_Guide.pdf](https://oqi.wisc.edu/resource-library/uploads/resources/Survey_Guide.pdf)**

## Program Accreditation Student Survey

▼ Default Question Block

Q1



The following is a survey to help our program to assess the effectiveness of our curriculum. Thank you for your thoughtful responses. Go Warhawks!

**After selecting “Descriptive Text” you can write a brief description of your survey.**

Q6

Did you complete the quantitative sociology course sequence?



Yes

No

**If you select, “Multiple Choice”, you can create a question like the one above.**

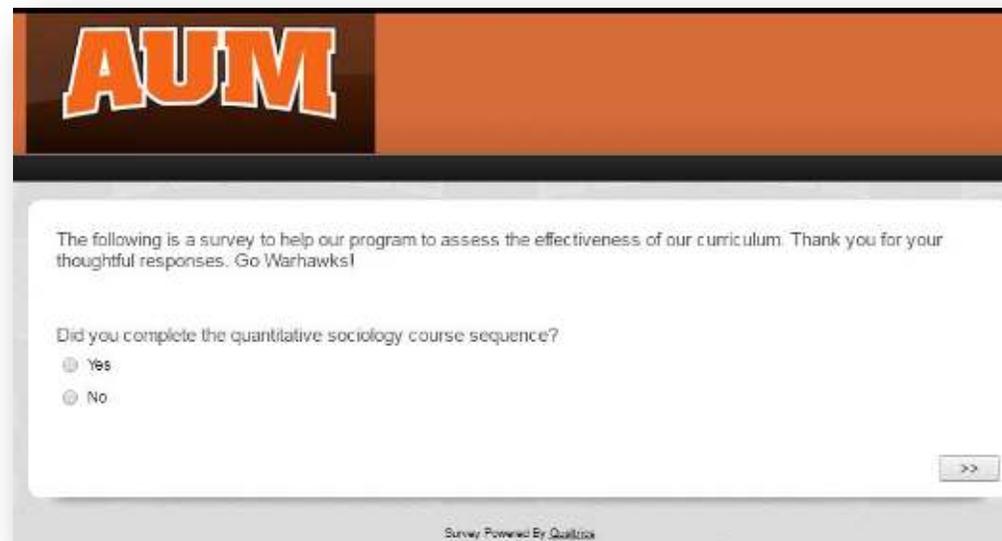
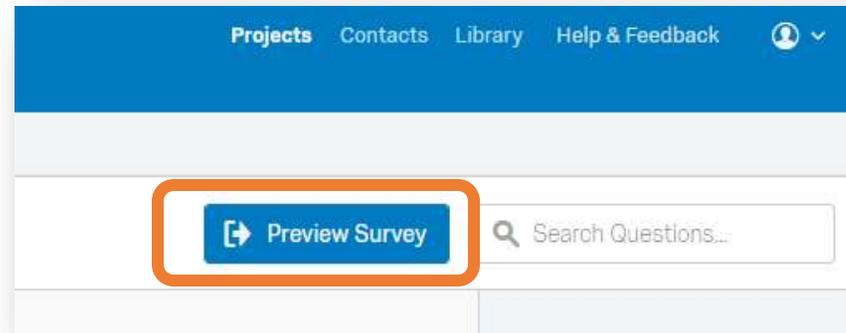
Q5 Please evaluate the following statements:

	Strongly agree	Agree	Somewhat agree	Somewhat disagree	Disagree	Strongly disagree
My data analysis projects in my quantitative sociology courses effectively equipped me to perform statistical analysis using statistical programming software (e.g., SPSS, STATA, SAS).	<input type="radio"/>					
I am able to apply the statistical analysis skills that I learned in my quantitative sociology courses in my current position.	<input type="radio"/>					

**A matrix table saves space and gives the appearance that your survey is shorter. The question format is especially useful with evaluating statements with a Likert Scale.**

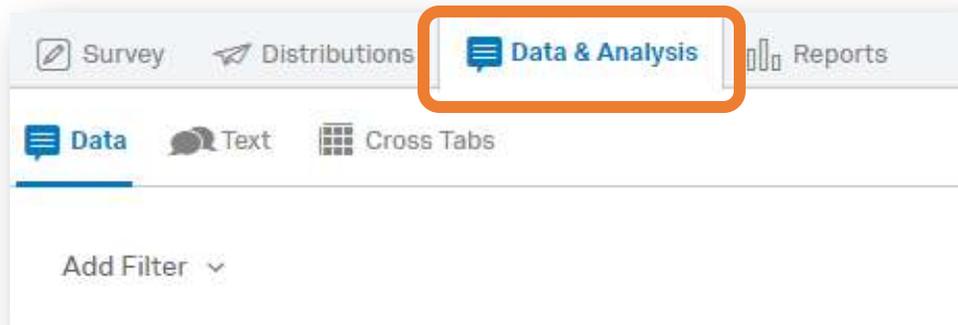
The image shows a survey question interface. On the left, there is a sidebar with a checkmark icon and 'Q6', a gear icon, and a refresh icon. The main area contains the question 'Did you complete the quantitative sociology course sequence?' with two radio button options: 'Yes' and 'No'. The 'No' option is selected and highlighted with a blue bar. Below the question, there is a skip logic rule: 'If No Is Selected Then Skip To End of Survey'.

**The above question uses skip logic to exclude respondents who have not completed the quantitative sociology course sequence. Respondents who select “No” will not be asked to evaluate the statements in the matrix table.**

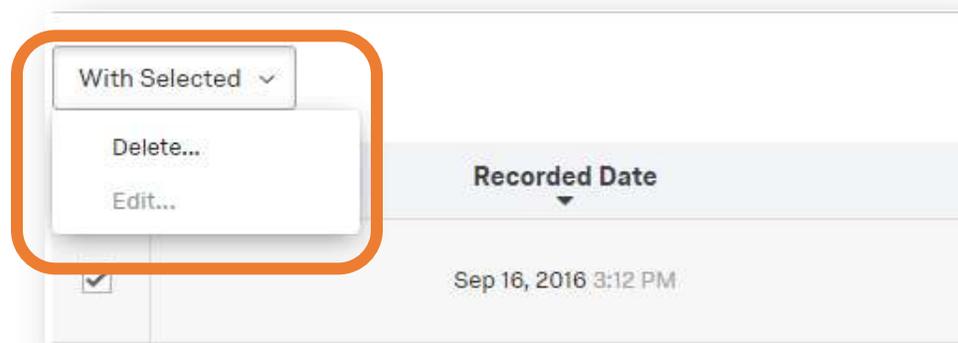


**You can verify the skip logic by previewing the survey. Select “Preview Survey” on the right side of your screen.**

You will want to re-enter *Qualtrics* by selecting the back arrow on your web browser.

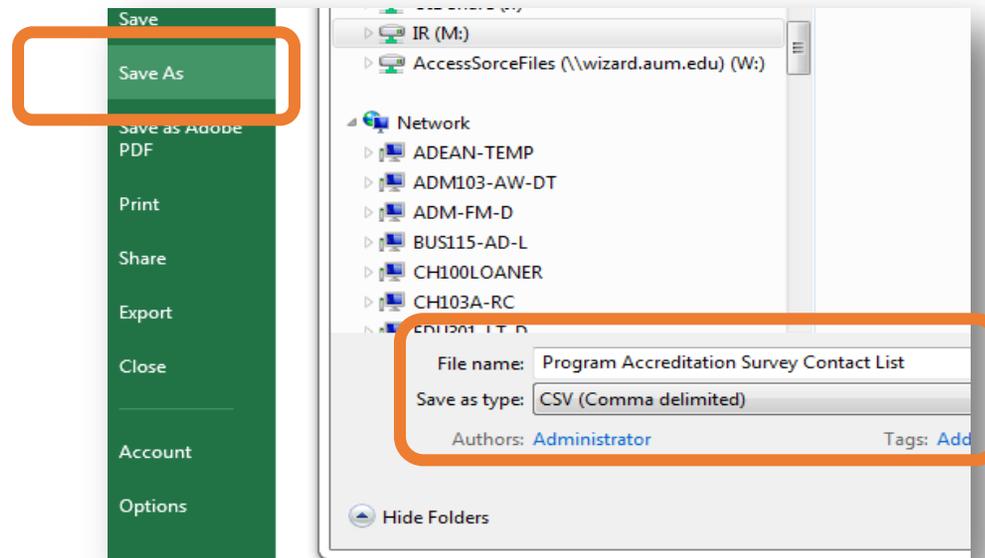


*Qualtrics* records the previewed survey response as an actual response. You will want to delete this survey response by going to “Data & Analysis” tab.

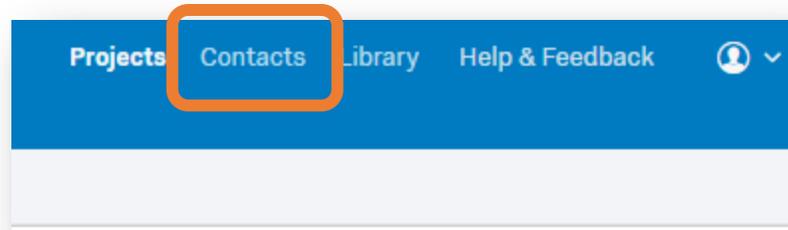


Selected “With Selected” and then click on “Delete”.

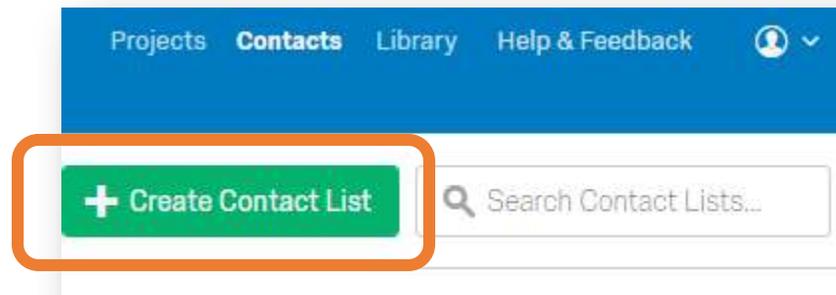
	A	B	C	D	E	F	G
1	FirstName	LastName	Email	Sex	Race/Ethnicity		
2	Alicia	Dean	adean10@F		Black or African American		
3							
4							
5							



**Open MS Excel and create five fields: “FirstName”, “LastName”, “Email”, “Sex” and “Race/Ethnicity”. Select “Save File As” a CSV (Comma delimited).**



Click on “Contacts” at the top right hand side of your screen to take you to the “Contacts” page.



Select “Create Contact List” to add your contact list which is a .CSV file from MS Excel. You can request a contact list for your survey from the Office of Institutional Effectiveness by contacting [oir@aum.edu](mailto:oir@aum.edu).

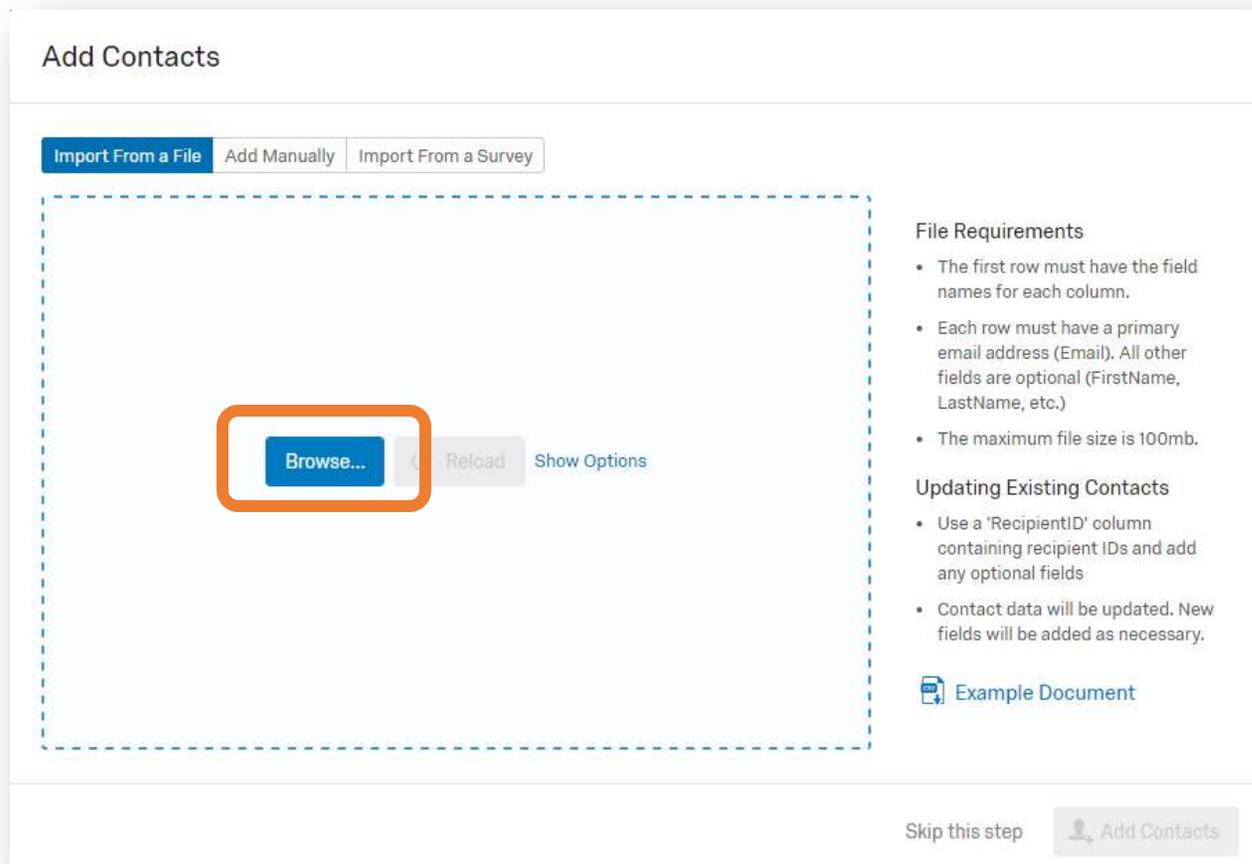
### Create Contact List

Name

Folder

Cancel

**You will need to give your “Contact List” a name. Including the survey name for the contact list name will help with organization.**



Select "Browse" and choose the .CSV file of all of your survey sample.

Browse... Reload Show Options

Program Accreditation Survey Contact List.csv 1 Contacts

- 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](#)

Verify Fields

Fields	First Contact
FirstName	Alicia
LastName	Dean
Email	adean10@aum.edu
Sex	F

Skip this step [Add Contacts](#)

Select "Add Contacts".

**Jobs in progress/complete**

✖ Program Accreditation Survey Contact List Import Started  
2018-05-18 10:00:41  
[View Contact List](#) 100.00%

Contacts: Alicia Dean > Program Accreditation Survey Co... ▾ **Projects**

Current Jobs: 1

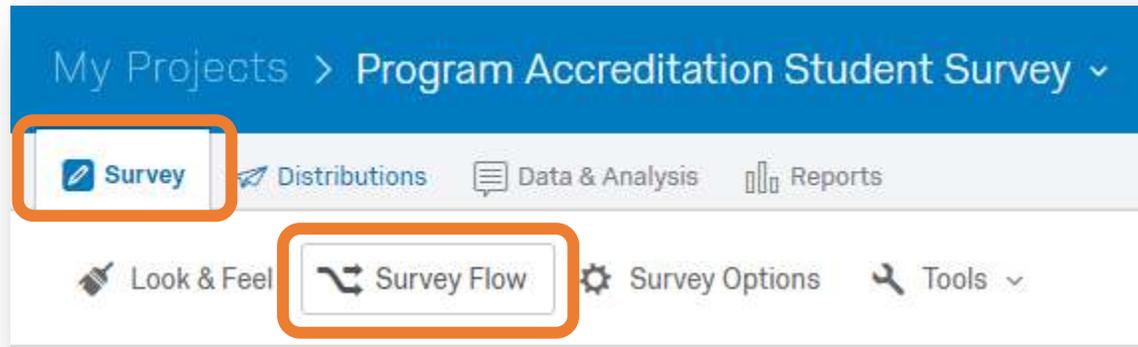
Add Filter ▾

No Items Selected ▾

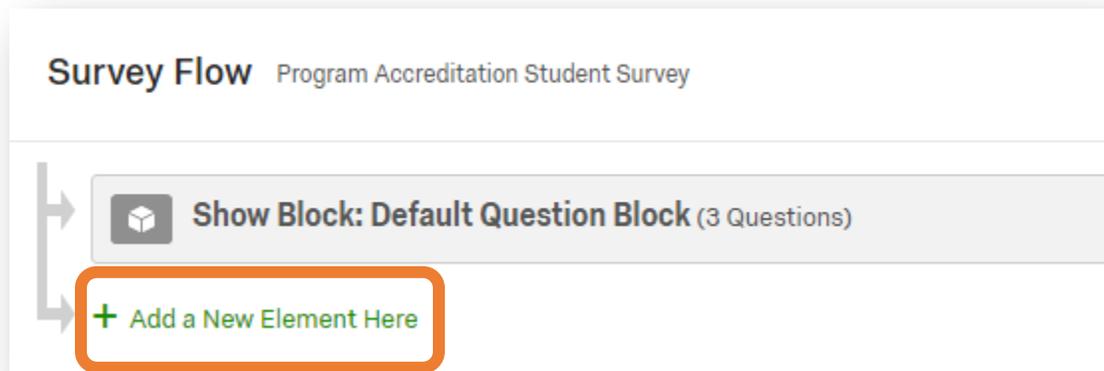
<input type="checkbox"/> Opted In	First Name	Last Name	Email
<input checked="" type="checkbox"/>	Alicia	Dean	adean10@aum.edu

Showing 1 - 1 of 1 Contact

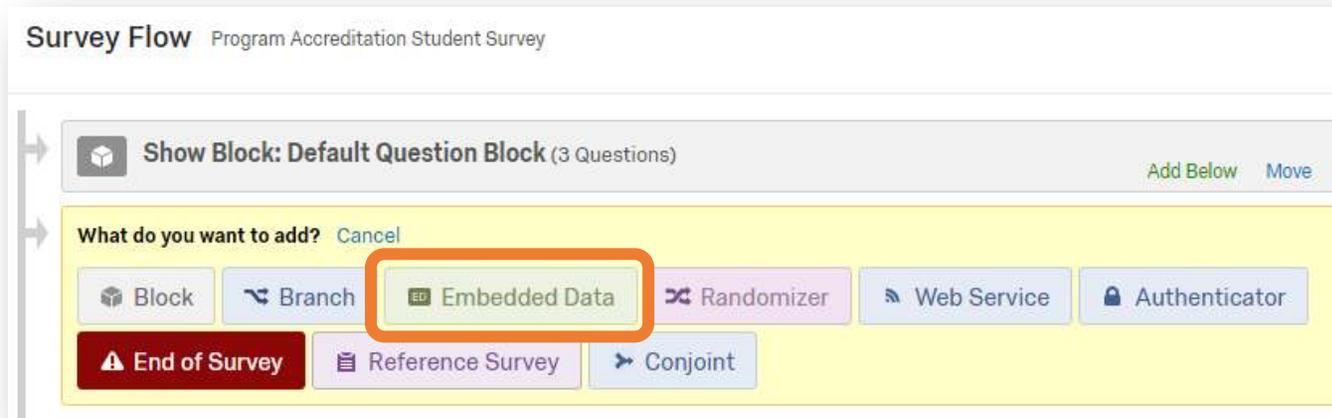
**Click on “View Contact List” and you will get a “Contact List” like the one above. Select “Projects” at the top right side of your screen. Choose the project you are currently working on.**



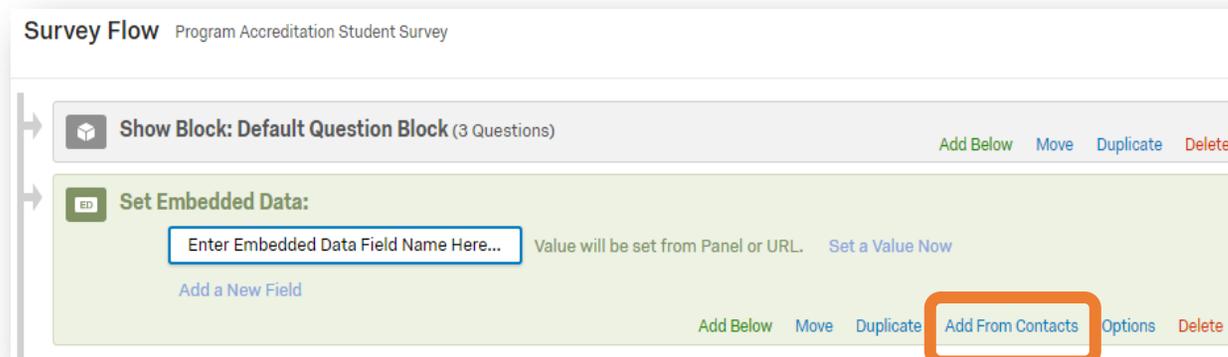
Once you are in the survey again, select the “Survey” tab. On this tab choose “Survey Flow”.



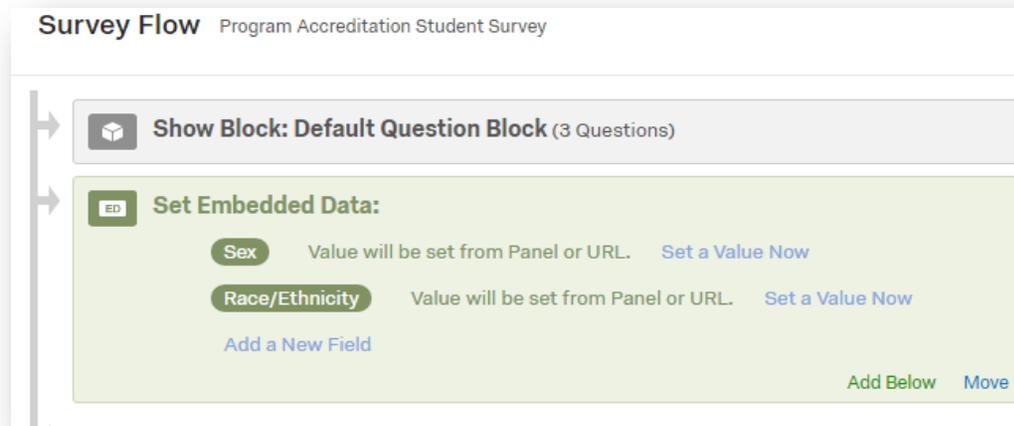
Once you are in the “Survey Flow” select “Add a New Element Here”.



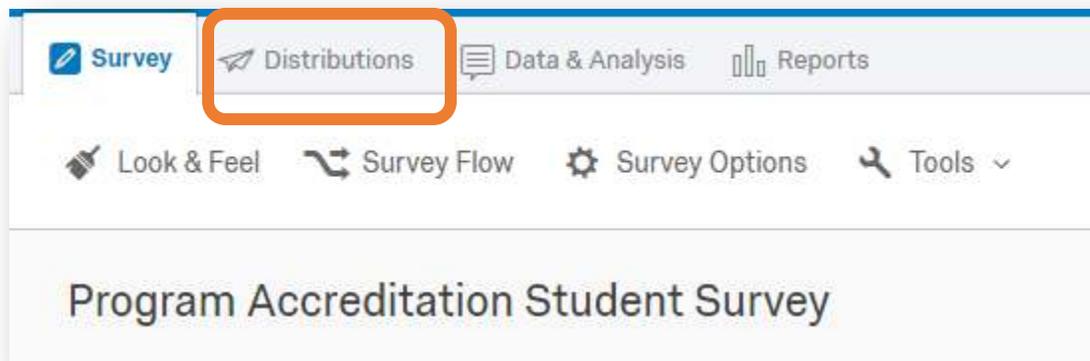
**Choose “Embedded Data”. The embedded data comes from your contact list.**



**Click on “Add From Contacts”. You will want to select the contact list that is associated with your survey.**



**The embedded data fields are demographic fields: sex and race/ethnicity.**



**Saving the “Survey Flow” will take you back to your survey’s main page. 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 will select the “Compose Email” option which will create a by invitation only survey distribution.**

Compose Email

To:

From: noreply@qemailserver.com

From Name: Alicia Dean

Reply-To Email: adean10@aum.edu

When:

Subject: Subject

Message:

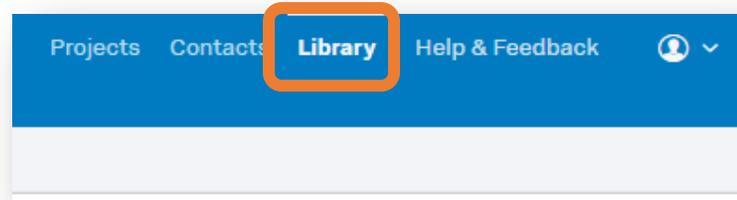
Follow this link to the Survey:  
\$[!:/SurveyLink?d=Take the survey]

Or copy and paste the URL below into your internet browser:  
\$[!:/SurveyURL]

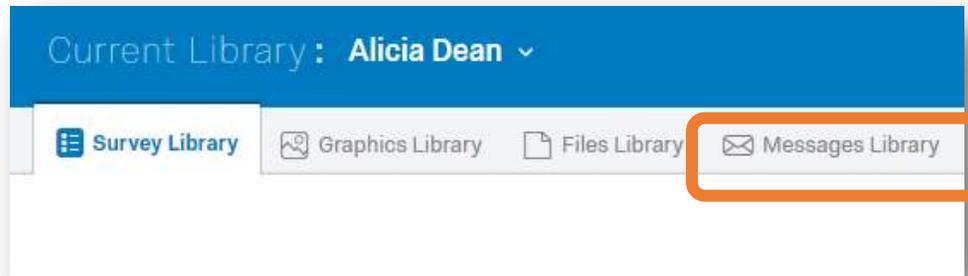
Follow the link to opt out of future emails:  
\$[!:/OptOutLink?d=Click here to unsubscribe]

Show Advanced Options Cancel Send Preview Email

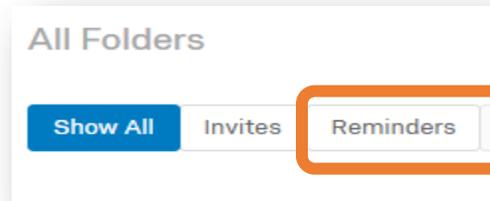
**“Select Contacts” is where you will select the contact list that you uploaded earlier. If you want to make the survey from a particular office, change the “From Name” from your name to the office name. To schedule a specific time for distribution, select the down arrow in the “When” field. You will want to make sure to delete the opt out of future emails link. Send after drafting a message.**



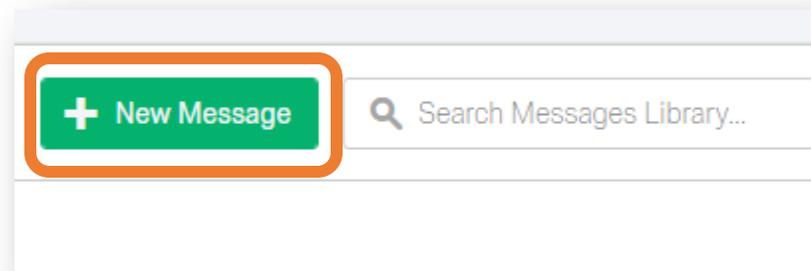
Choose “Library” at the top right corner of the screen.



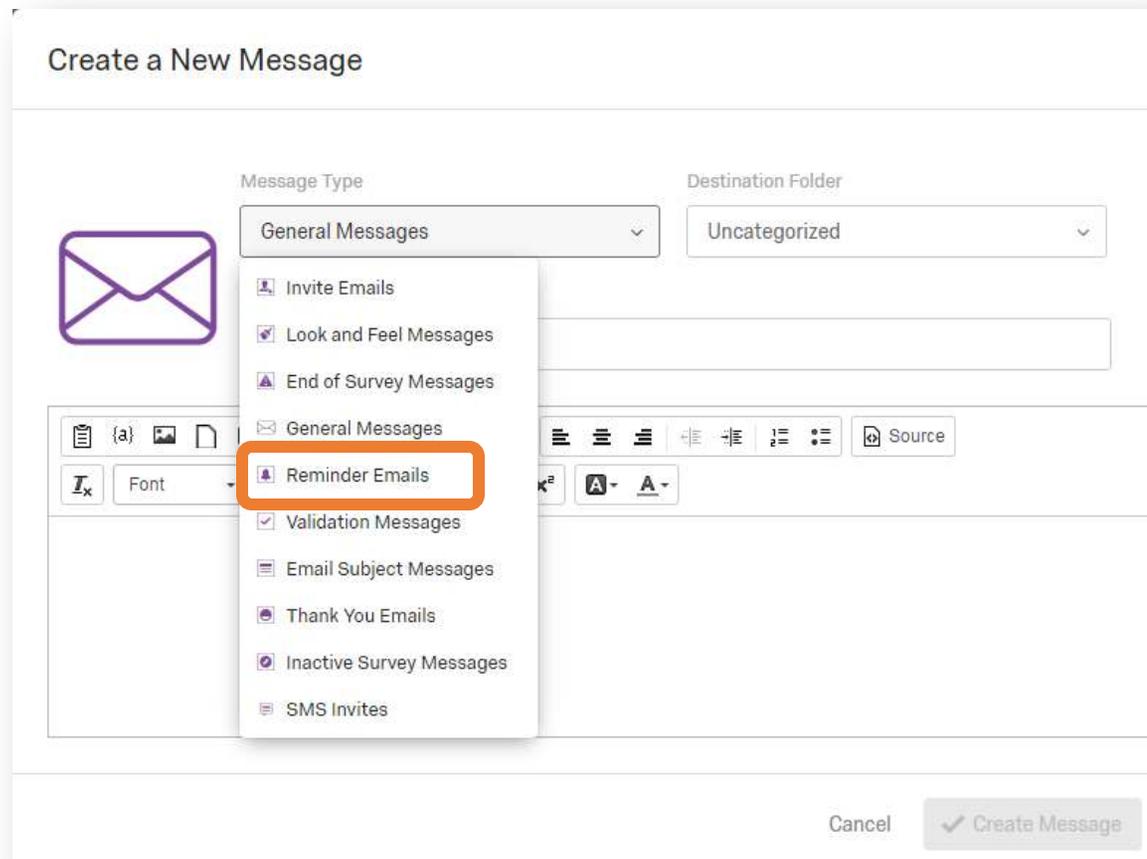
Select “Message Library” from the “Library” tabs.



To setup reminder messages for your survey, select “Reminders”.

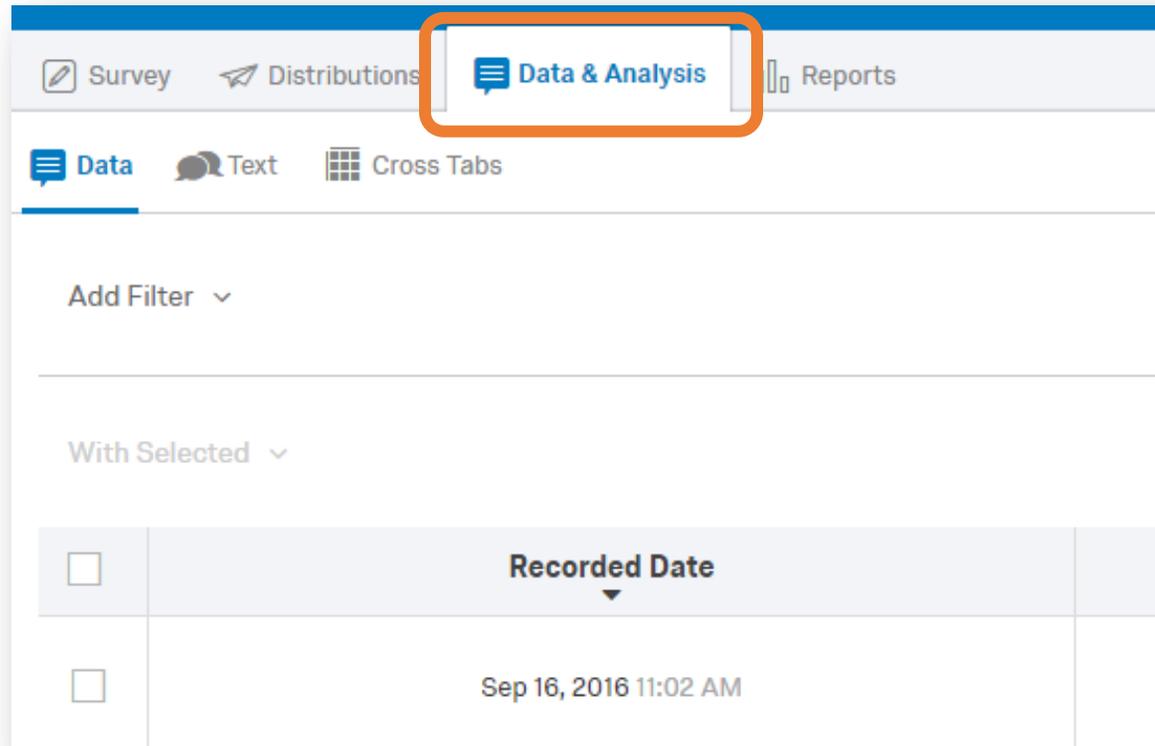


Select “New Message” to create your reminder.

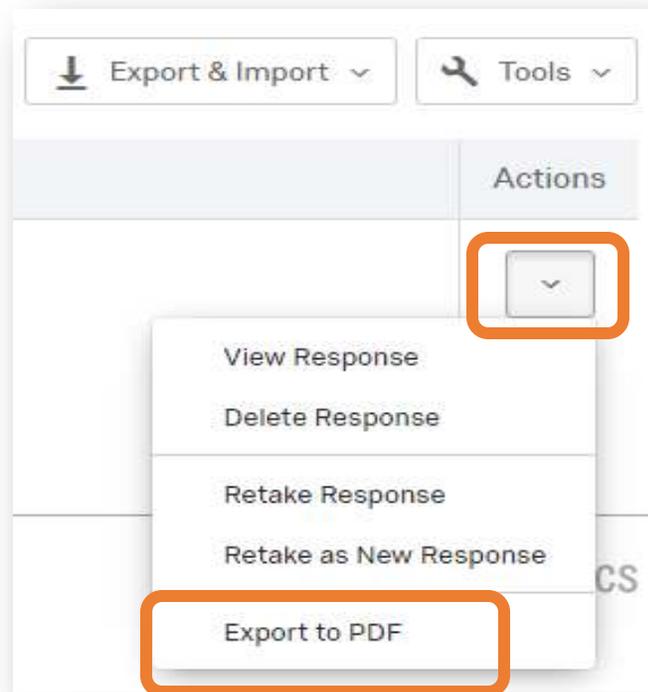


Select “Reminder Emails” from “Message Type”.

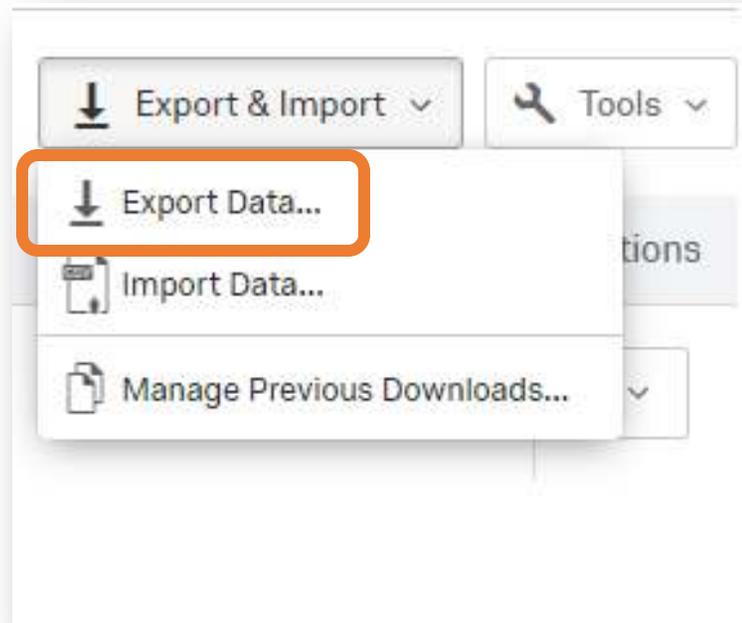
After you have collected all data, you will want to download your results for analysis. Choose “Projects” at the top right side of your screen and select your survey.



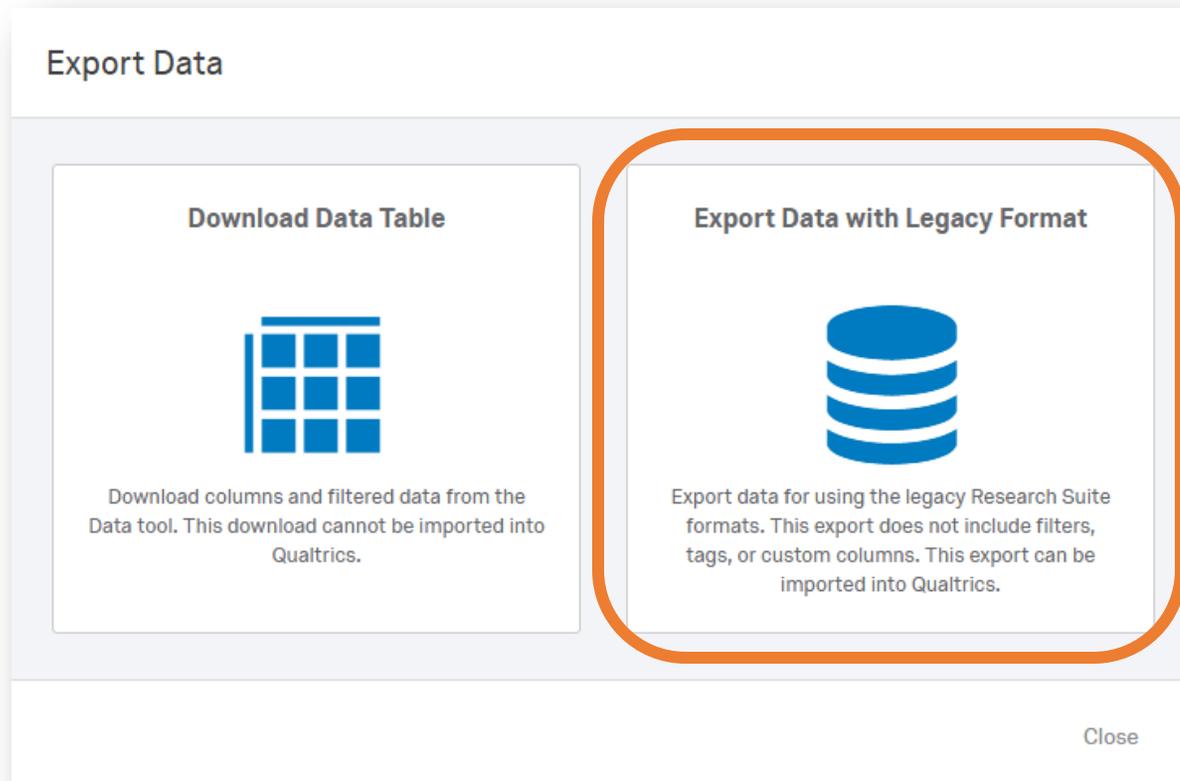
Select the “Data & Analysis” tab.



Select the down arrow under “Actions” and choose “Export PDF”. The PDF is a simple display of your survey results.



**If you want to download the raw data, select “Export Data”.**



**Choose “Export Data with Legacy Format” to download your raw data. “Download Data Table” is another option with the new Qualtrics Insights Platform.**

< Export Data Set

CSV XML SPSS HTML Fixed Field Text User Submitted Files

 Comma separated values

This is a .csv file that can be imported into other programs. Each value in the response is separated by a comma and each response is separated by a newline character.

Use legacy View Results format

Only include responses started between:

and

[More Options](#) [Close](#) [Download](#)

**Download your file as a .CSV file and save to a folder on your computer.**