

Qualtrics Training Guide

Qualtrics is a web-based application for creating and administering online surveys and polls. The service is available to all Baruch College faculty, staff and students. We've provided a training guide here to get you started with in using the service. For more training resources on Qualtrics, please go to: <http://www.qualtrics.com/university/>

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I. Basic Overview

Creating an Account and Logging In on Qualtrics

1. Start by going to <http://www.qualtrics.com/baruch.html> and click the link where it says, "Click here to register and start taking advantage of Qualtrics."
 - a. You can also go directly to the registration page here: <https://baruch.qualtrics.com/ControlPanel/Register.php?BrandID=baruch&ServerID=Prod>
2. Enter your email address (@baruch.cuny.edu) and create a password. Click "Continue".
3. Type in your First Name and Last Name. Click "Finish".
4. It will now bring you to a page where it indicates, "All Finished!", but you're not quite done yet. Click the "Sign Me Up" button. You will now receive a verification email in the mailbox of the email address you specified when signing up.

- When you receive the verification email, click the link that says, "Please click here to finish your request". This will open up your internet browser and bring you to a page where it indicates that your account is now active. Click the link on the page to login.
- Type in your email address and the password you created. You're done!

Note that you will be able to access Qualtrics from now on at <http://www.qualtrics.com> with your email address and password.

Creating a Survey or Form in Qualtrics

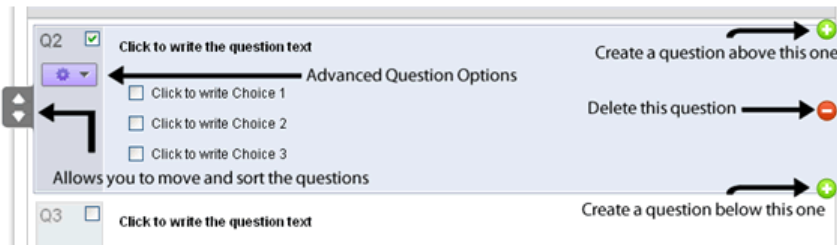
- After you login to Qualtrics, click "Create Survey".
- You have the following options:
 - Quick Survey Builder - This will create a survey from scratch.
 - Create from Copy - This will duplicate an existing survey.
 - Survey Library - This will create a survey from a template that either you have created or from Qualtrics's library of templates.
- For the purpose of training, please select "Quick Survey Builder"
- Enter the name of the survey and a folder for organizational purposes. You may wish to lump a series of surveys into one folder so pay attention to the name of the folder as you may use it for storage of future surveys.
- Click "Create Survey" when you're done and you will be brought to the "Edit Survey" screen. You've just created a survey.

Adding Questions in Qualtrics

The screenshot shows the Qualtrics 'Edit Survey' interface. At the top, there's a navigation bar with 'Edit Survey' and 'Edit Questions' buttons. Below that is a toolbar with icons for 'Look & Feel', 'Survey Options', 'Survey Flow', 'Print Survey', 'Spell Check', 'Preview Survey', and 'Launch Survey'. The main area is divided into a 'Default Question Block' and a '3. Options Area'. The 'Default Question Block' contains a question text field and three choice options. A '1. You should see the question above after creating a new question' message is displayed at the bottom of the question block. The '3. Options Area' is on the right side of the question block. A 'Change Question Type' dropdown menu is open, showing 'Multiple Choice' selected. The 'Options Area' on the right includes 'Choi... 3 Edit Multiple', 'Automatic Choices', 'Answers' (Single Answer, Multiple Answer, More), 'Position' (Vertical, Horizontal, More), and 'Validation Options' (Force Response, Add Page Break, Add Display Logic, Add Skip Logic, Copy Question, Move Question, Preview Question).

- After you login to Qualtrics, click "Edit Survey" and select the survey or form you wish to edit.
- Click "Create a New Question". You should now see a question block on your screen.
- If you wish to change the question type to a text entry, drop-down list, or something else, click the green button below "Change Question Type". This will open up a list of question types that you can choose from.
- Each question type has its own list of options that can be found in the options area on the right-hand column. Some of these options include:
 - Validation - When you activate the "force response" option, a user must answer that question in order to proceed or submit a survey/form. Note that some question types such as "text entry" allow for more validation options such as validating an email address or phone number

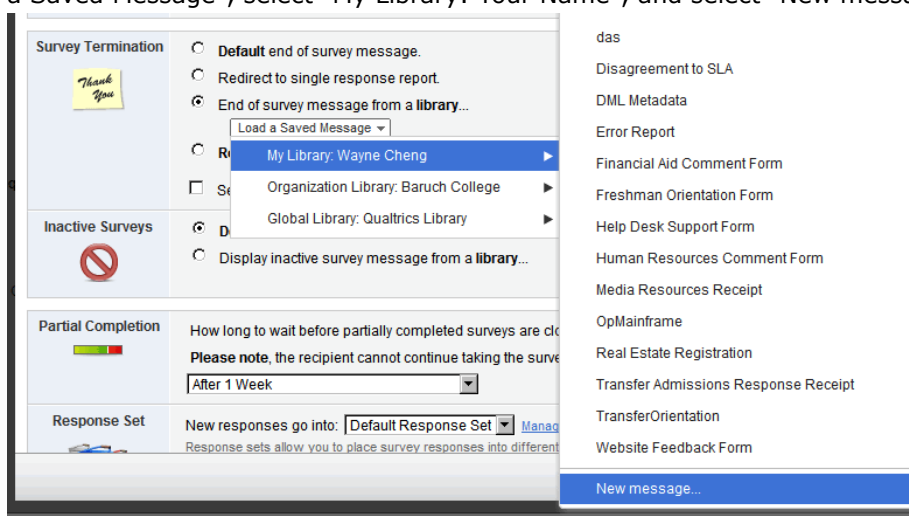
- for data uniformity. You are also able to set a validation type for multi-answer questions in which a user **must** select at least a certain number of choices.
- b. Answer Type - You can set multiple choice questions to become a checkbox by selecting the "multiple answer" option.
 - c. Text Type - When you are using a "text entry" question type, you can set it to different text lengths with the "single line" or "multi line" options.
5. When you hover over or select a question, you will see several convenient options that are explained in the picture below.



The advanced question options allow you to display or skip certain questions if other questions are answered in a certain way. For advanced users, there is the option to add javascript for some dynamic functionality / possible custom validation.

Adding a Custom Message at the End of Survey

1. Click "Edit Survey" and select the survey you wish to have a custom message.
2. Click "Survey Options"
3. In the "Survey Termination" panel, select "End of survey message from a library...", then click "Load a Saved Message", select "My Library: Your Name", and select "New message...".

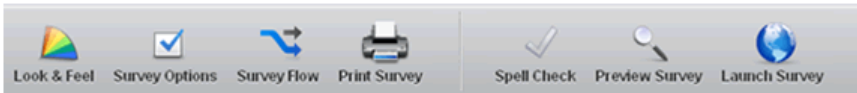


4. Type in the description (the message will be saved under this name for future use) and message you wish users to see after they've filled out your survey.
5. Click "Save" in the message editor and then "Save Changes" under the "Survey Options" menu. You're done.

Edit a Custom Message You've Created

1. To access or edit your message in the future, click the "Library" tab and then "Message Library"
2. This will bring you to the "Message Library" page where you can view or edit your messages.

Toolbar Information in Edit Survey Screen



Look & Feel - This is to customize the theme and colors for your survey in Qualtrics. The BCTC Web Group has created a theme for Baruch College that will require edits in this Look & Feel area that will be discussed further in the training guide.

Survey Options - You will be to configure the survey in this options area. Notable options include:

- allowing users to save and go back in a survey
- setting the survey to be by invitation only
- restricting users to only be able to take the survey once
- setting up a message that the user will see after taking the survey

Survey Flow - A somewhat advanced function, you can program your survey to do things such as:

- providing different question sets upon receiving an answer to a certain question
- terminating the survey upon receiving an answer to a certain question

Print Survey - Prints the survey

Spell Check - Spell checks the survey

Preview Survey - Allows you to preview the survey and has an option to ignore validation so you can test the survey without having to take it

Launch Survey - Redirects you to the "Distribute Survey" panel and shows you the URL to your survey so you can distribute it (if it is not by invitation only)

Activating and Distributing a Survey for Production

1. Once you've created and finished editing and configuring your survey, you must first activate the survey in the "Distribute Survey" tab. If it does not bring you to the "Survey Link" section, click on the "Survey Link" button.
2. Click "Activate your survey to collect responses" and you should now see a page with a link. If your survey is not by invitation only, this is the link or URL that you will need to copy and put on a website so users can access and take your survey or form.

For Surveys Requesting Non-Public Data

1. When you see the page with a link after launching the survey, please ensure that the survey link begins with **https://** and not **http://**. If it does not begin with **https://**, you may have to change it to **https://** to distribute the link. For instance, if Qualtrics tells me the link to my survey is "**http://**baruch.qualtrics.com/SE/?SID=SV_5jvochhqUpQ8Opu", I will distribute it to others as "**https://**baruch.qualtrics.com/SE/?SID=SV_5jvochhqUpQ8Opu" This is to ensure that requested non-public data is delivered over a secure encrypted protocol.

If your survey is invitation only:


Create a panel and manually add users or import from an Excel file

1. If your survey is configured to be invitation only in the "Survey Options" screen, you need to email users your survey. This requires the creation of a panel which you can do by clicking on the "Panels" tab.
 - a. If you are only emailing this survey to a couple of people, you can use the "Quick Send" mailer on the "Email Survey" page which is under the "Distribute Survey" tab.
 - b. Type in their email, first name, last name, and click "Send Now". That's it.

- Once you're on the "Panels" page, click "Create New Panel". Type in the panel name and set a destination name, this is a folder which will store that panel.
- You now have the option of entering user information by clicking "Add New Panel Members" if you do not have a database or file of users on hand.
- If you do have a database or excel spreadsheet of user information, click "Import/Update Panel Members" and click "Import/Update from a File".
- Follow the instructions that Qualtrics will give you in order to import from a file. Make sure that the columns are named according to the example document that is shown on the page. You will know if the import is successful when the panel is full of user information.

Import/Update From a File

- The first row must have the field names for each column.
- Importing a new panel? Each row must have a primary email address (PrimaryEmail). All other fields are optional (FirstName, LastName, etc.)
- Updating an existing panel? Use a 'RecipientID' column containing recipient IDs and add any optional fields. The data will be updated or added as needed. New panel members will not be created.
- Export a panel for an example update file.
- The maximum file size is 16M



Example Document
(2.4k)

Select a CSV File

 [Import Options...](#)

Schedule a mailing with the panel you've just created

- Once the panel is set up, go back to the "Distribute Survey" tab and click "Email Survey".
- Choose a time to send out the email, you can set a specific time by selecting "Custom"
- Select "Panel" under "Who to send to". Select your name/account for "Library" and the panel you've just created for "Panel".
- Select "Create a Message" for the email that will go out to users. You can edit and customize this email, but make sure not to delete the items that already exist within the email. They contain the link for the user to take the survey.
- Click "Schedule Mailing" to finalize your mailing. You can keep track of its progress by clicking the "Email History" button.

Quick Send
Survey Mailer

When to send email(s) Advanced Options

Send in 1 hour ← You can set a specific time to send out the emails by selecting "Custom"

Who to send to

Panel
 Panel Sample
 Individual
 Email Address

Email Message

From Name:

From Email Address:

Subject:

Message From Library
 Create a Message

Library: Name:

Follow this link to the Survey:
 \${UI.SurveyLink?d=Take the Survey}

Or copy and paste the URL below into your internet browser:
 \${UI.SurveyURL}

Follow the link to opt out of future emails:
 \${UI.OptOutLink}

You can customize this message, but do not delete these items!
 They generate the link for the user to take the survey!

Reviewing Results of Survey or Form

1. You can view the ongoing results of a survey at anytime by clicking "View Results". Make sure the correct survey is selected by looking at the "Current Survey" section which is near the top right of the page.
2. This should bring you to the "View Reports" page, click "Initial Report" to view all the responses.
3. If you wish to download the data, select "Download Data". The page will offer you several options to retrieve the data.

Creating a Report to Filter Results and Data

1. Select "View Results" and the survey you wish to view the results for.
2. Select "Create a New Report" on the "Select a Report" page.
3. Select "Add a Subgroup for This Report..."
4. You should now see two drop-down menus.
 - a. Select the question and the answer that you wish to filter. (See pic)

#	Answer	Response	%
1	6/14/10 - Airports: 21st Century Makeovers for the NY Metro Region	2	50%
2	6/23/10 - Freight and Our Region's Future	2	50%

5. Click "Apply Changes"
 - a. You should now only see the responses for the specific answer you've selected or X event.
6. Rename the report by going into "Report Options" -> "Rename Report" for your own convenience
7. Go into the "Download Data" section
8. Look under "Current Filters From Report" and you should see the name of the report you just created. If you do not, go back into "View Reports" and select the report you just created and go back into "Download Data"
9. The downloaded data should now only contain results for people who selected the answer you specified to be filtered.

Make a Report Publicly Accessible

Qualtrics is able to generate a URL for a report that anyone can access.

1. In the "View Results" -> "View Reports" tab, select a report you wish to make accessible.
2. Click "Public Report" after you reach the screen that shows you the results of a survey.
3. Click "Turn On Public Report"
4. You can enable password protection to only allow those authorized to view it.
5. Copy the public report link. This is the link you can distribute to those who wish to view the report without logging into Qualtrics.

II. Advanced Features in Qualtrics

Display a Question if User Selects "X" Answer Choice

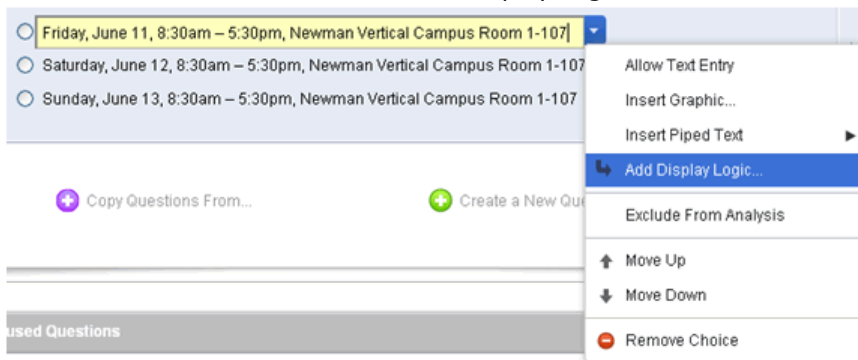
1. Go into "Edit Survey" and select the question you wish to have displayed **only** if a certain answer is picked.

2. Upon selecting the question, you should see a purple button with a gear on it. Click this button to reveal the advanced options. Select "Add Display Logic"
3. Select "Question" for the drop-down item after "If" and select the question and choice that you would like to have this question appear after selecting.
 - a. You also have the option of having it so if the choice is not selected, the question will appear.
4. Click "Save", that's it!

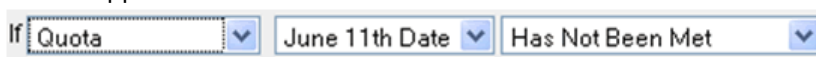
Do Not Display a Choice if a Quota Has Been Met

This feature is useful for those creating event registration forms. By using a quota, you can make an event date not appear to users when it has been filled.

1. Go into "Edit Survey" and click "Advanced Options" -> Select "Quotas..."
2. Click "Add a Quota"
3. Specify the question and answer that you wish to accrue a quota. If it is a multiple choice item, you would make it accrue a quota if it is "selected". If it is a text entry, you would make it accrue a quota if it is "not empty".
4. Give the quota a name and limit.
5. Click "Save Quotas"
6. Select the question then click the answer choice that you wish to not display if the quota has been met. Upon selecting the answer choice, you should see a down arrow.
7. Click the down arrow and select "Add Display Logic"



8. After the "If" statement, select "Quota" from the drop-down menu, select the quota you've just created in the second drop-down menu, and then select "Has Not Been Met" in the third drop-down menu. Click "Save". You're done.
 - a. If the quota you've created does not appear as a choice, press F5 to refresh your page. It should appear now.

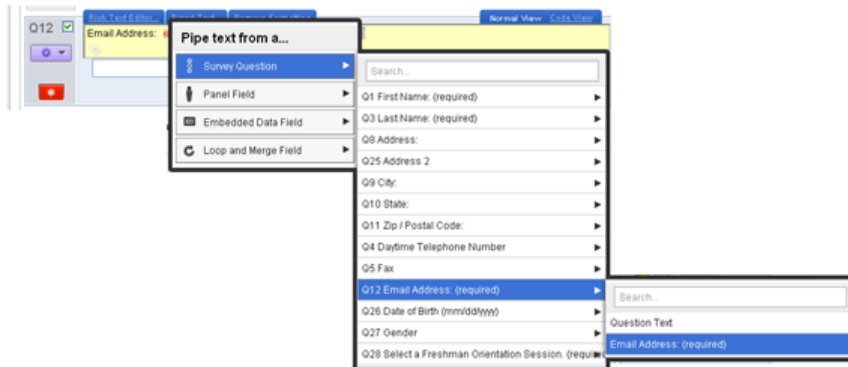


Sending a confirmation email/receipt to yourself after user submits survey

1. Click "Edit Survey" and select the survey you wish to edit
2. Click "Advanced Options" and select "Email Triggers"
3. Click "Add a Trigger"
4. Fill out your email address in the "To Email Address" field and type in a subject that you will recognize when you are emailed the results by Qualtrics. Make sure "Include Response Report" is checked as this contains the data from the submission.
5. Click "Save Triggers". You're done.

If you wish to be able to respond to the user who submitted the survey/form, you must do the following:

1. Make sure that you've created a text entry question requesting the user's email address.
2. Select the question that asks for the email and click the question area. A mini-toolbar should appear. Select "Piped Text"
3. Under "Pipe text from a...", select "Survey Question" -> select the question that asks for the email address -> select the bottom choice that is not "Question Text".



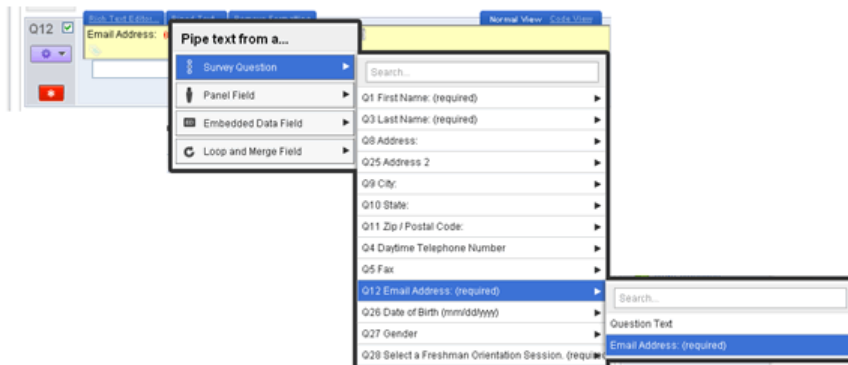
4. It should now add a string of code to your question text area that looks somewhat like this:

```
${q://QID12/ChoiceTextEntryValue}
```

5. **Cut** (CTRL + X) the string of text then click "Advanced Options" and then select "Email Triggers"
6. Select the email trigger you've already created or create a new one.
7. In the "From Email Address", paste the string of code.
8. Click "Save Triggers". You're done.

Sending a confirmation email/receipt to the user after user submits survey

1. Click "Edit Survey" and select the survey you wish to edit
2. In order for the user to get an email, there must be a question requesting this information. Make sure that you've created a text entry question requesting the user's email address.
3. Select the question that asks for the email and click the question area. A mini-toolbar should appear. Select "Piped Text"
4. Under "Pipe text from a...", select "Survey Question" -> select the question that asks for the email address -> select the bottom choice that is not "Question Text".



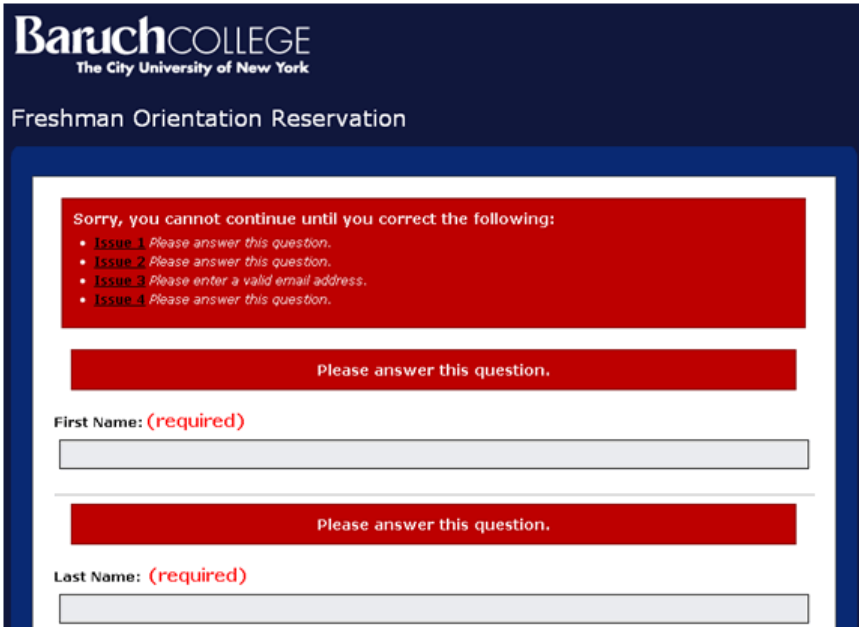
5. It should now add a string of code to your question text area that looks somewhat like this:

```
${q://QID12/ChoiceTextEntryValue}
```

6. **Cut** (CTRL + X) the string of text then click "Advanced Options" and then select "Email Triggers"
7. Click "Add a Trigger" or "Add another Trigger" if you already have one set up.
8. Under the "To Email Address:" text area, paste the string of code.
9. Under the "From Email Address:" text area, you may put in your department's or your own email address.
10. Type in a subject and message. Qualtrics will email the user's choices from the survey along with this message to the user's email.
11. Click "Save Triggers". You're done.

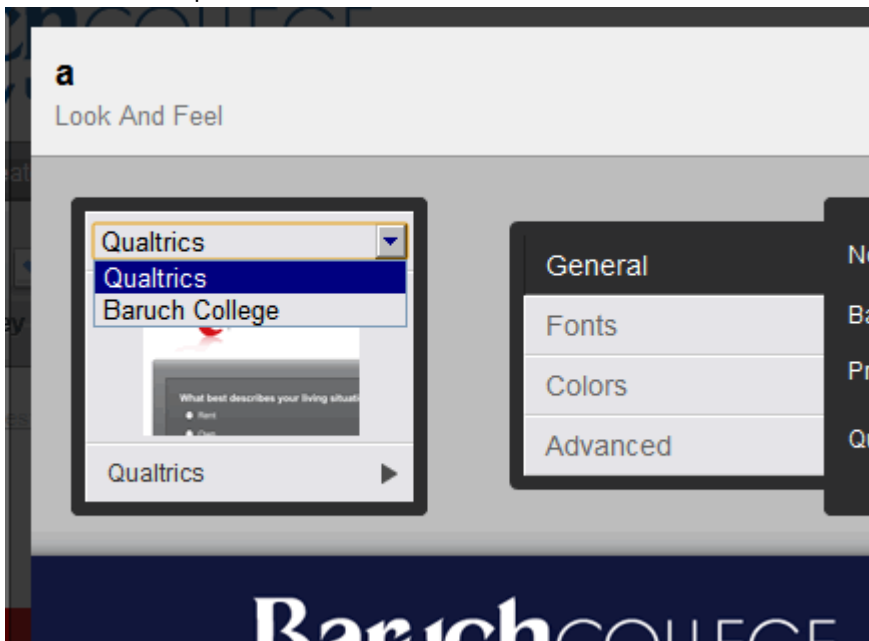
Customizing your survey to fit Baruch College's Visual Standards

This theme was created by the BCTC Web Group to fit the Visual Standards of Baruch College. Please follow the instructions below to adjust your survey to adopt this theme.

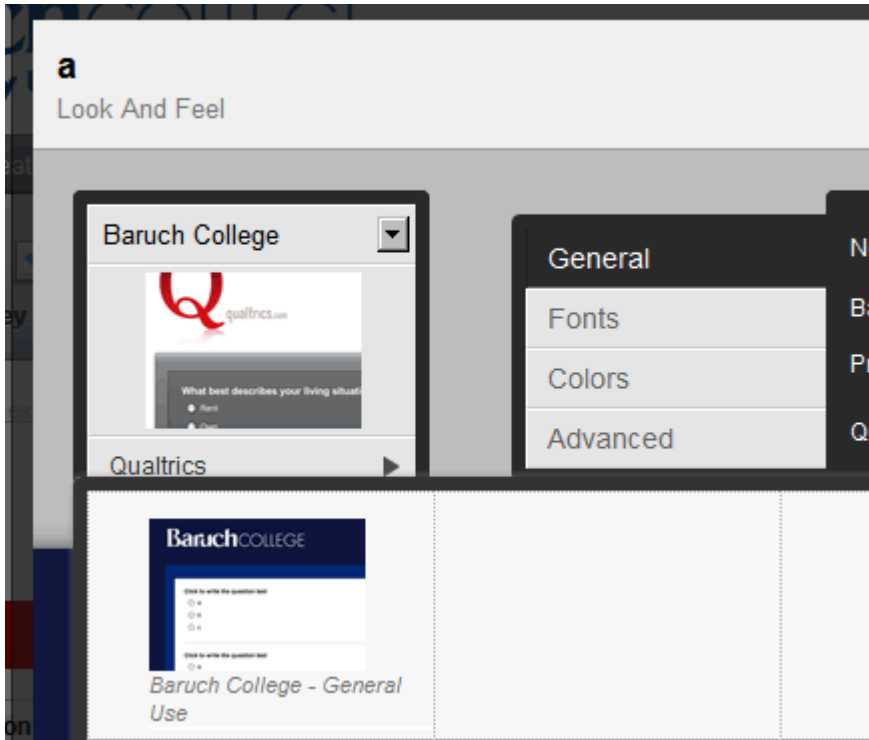


The screenshot shows a survey form titled "Freshman Orientation Reservation" for Baruch College. At the top left is the Baruch College logo. Below the title, there is a red error box with the text: "Sorry, you cannot continue until you correct the following:" followed by four bullet points: "Issue 1 Please answer this question.", "Issue 2 Please answer this question.", "Issue 3 Please enter a valid email address.", and "Issue 4 Please answer this question." Below the error box is a red button that says "Please answer this question." Underneath is a text input field for "First Name: (required)". Below that is another red button with the same text. At the bottom is a text input field for "Last Name: (required)".

1. Click "Edit Survey" -> Select "Look and Feel"
2. Select "Baruch College" instead of "Qualtrics" in the drop-down menu that is above the image of the theme at the top-left corner of the screen.



3. Select "Baruch College - General Use" instead of "Qualtrics" in the menu that is below the image of theme at the top-left corner of the screen.

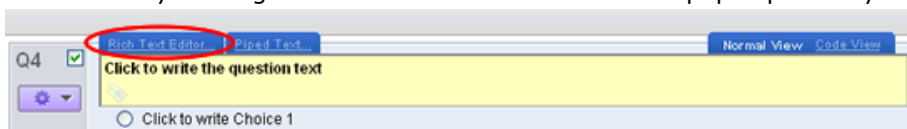


4. Click "Advanced" and insert text into the "Header" that best describes the title of the survey or form (for instance: Media Resources Request Form)
5. Click "Save" and you're done! The survey should look like the one pictured above.

III. Common Uses of Qualtrics

Creating a Form

1. Click "Create a New Survey" -> Select "Quick Survey Builder"
2. For form elements such as Name, Address, Zip Code, etc - select "Text Entry" for the question type.
3. For form elements that require the user to pick multiple answers, select "Multiple Choice" for the question type and select "Multiple Answers" under the "Answers".
4. For form elements that require the user to select an item from a drop-down list (such as a list of Majors), it is not on the main question type page, but you must click "Show All Question Types" which will show all question types, then select "Dropdown List".
5. Select "Force Response" under "Validation Options" for questions that require an answer. Make sure to note that it is required in the question itself either by stating "(required)" or "*". You can change font colors by clicking the "Rich Text Editor" button that pops up when you select the question.



- a. For "Text Entry" questions, you can add additional validation for the following types so answers must be in this specified format to pass validation:
 - Email Address
 - US Phone Number
 - US State
 - US Zip Code
 - Date (mm/dd/yyyy)
 - Number
 - Text Only (Non-numeric)
6. If you wish to have an email sent to you or the user after the form is submitted, please see ["Sending a confirmation email/receipt"](#)

- To set up a message that will display after the user submits the form, please see "[Adding a Custom Message at the End of Survey](#)"
- To filter results after form has been deployed, please see "[Creating a Report to Filter Results and Data](#)"

Creating an Election Ballot

- Click "Create a New Survey" -> Select "Quick Survey Builder"
- For elements that require the user to pick multiple answers, select "Multiple Choice" for the question type and select "Multiple Answers" under the "Answers".
- For ballots where there are multiple choices, set an "Answers Range" under "Validation Type" so users can choose from at least X amount of candidates and at most Y number of candidates. You must check off the "Force Validation" option for this to work.

Vote

The screenshot shows a 'Default Question Block' with the question 'Vote for (Position) from (Whatever) - Pick TWO only'. It lists five choices (Choice 1 to Choice 5). The configuration panel on the right is set to 'Multiple Choice' with 'Multiple Answer' selected. Under 'Validation Options', 'Force Response' is checked. Under 'Validation Type', 'Answers Range' is selected, with 'At Least' set to 0 and 'No More Than' set to 2.

- The survey options must be configured to be by invitation only and the "Prevent Ballot Stuffing" option must be on. You can also set up a time period in which the election ballot is active. If you set it to be active on Jan 21 and end on Feb 21, it will become active at 12:01am on Jan 21 and inactive on Feb 21 at 12:01am.

The 'Survey Protection' panel includes a lock icon and the following options:

- Open Access. Allow anyone to take this survey.
- By Invitation Only. Allow only those who receive invitation emails to take the survey.
- 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.
- This survey does not expire.
- This survey is valid from: 2010-06-21 to: 2010-07-21

- For instructions on how to deploy the election through email, please see "[If your survey is invitation only:](#)"