WHEN WOULD YOU WANT TO USE QUALTRICS?

Whenever you get that urge to integrate technology into something you’re about to do, **THINK**

- What do I need to accomplish?
- HOW could the technology help me accomplish it?

• Survey staff or faculty in preparation for staff or faculty meetings
  - Saves meeting time
  - Helps prepare for discussion (debate)
• Exit survey for staff, faculty or resident development
• Faculty Awards!
• Needs assessment
LESSONS LEARNED*

• Be careful about ...

• Selecting question types (Example, multiple choice with drop down menu; free text; multiple choice with ability to enter text) - What type of data do you want? Which question type will achieve this?

• Combining question types – Are the instructions adequate to highlight for respondents that this is a different question type or different answer choice range?

• Which display will work best with the potential respondents? One item per page or all items on one page?

• Survey navigation options – Are navigation options confusing?

• Anonymous vs identified – Consider your obligations regarding the type of data that is appropriate to collect? Share? How it can be shared?

• Ensuring respondents know when they are submitting the survey – Do you need to signal that they have come to the end of the survey? Do you want to include a back button as a last chance to change answers before submitting? If you have to use the NEXT button as your “Submit” button, should you include a CAPTCHA item to signal they have come to the conclusion of the survey?

* "Lessons Learned" contributed by:
Diane Poskus, M.A.  Cat Dutcher, M.Ed.
Program Manager, Years 3&4  Former Program Manager, Years 1 & 2
HOW TO ACCESS QUALTRICS*

Go to http://softwarelicense.arizona.edu/qualtrics

Click on the link that says Qualtrics Login, about 1/3 of the way down the page

This will take you to the Web Auth login

Use your UA Net ID to login

The Qualtrics application will then open in that window

*If you get a message about “Migration” of your account, clear your browser cache (history) or open a new browser and go to this address. It should take you to the WebAuth screen to login.
CREATE YOUR SURVEY

How to create a survey

• Question Types – When to use which types
  • Multiple choice single best answer
  • Multiple answer
  • Rank order
  • Other types
Open-ended questions

To identify preferences or biases

Visual Analog Scales

Respondents can upload a file

Question Types

- Special Instructions w/o answer choices
- Multiple Choice
- Open-ended questions
- To identify preferences or biases
- Visual Analog Scales
- Respondents can upload a file

Static Content

- Descriptive Text
- Multiple Choice
- Text Entry
- Slider
- Rank Order
- Side by Side
- Constant Sum
- Pick, Group, and Rank
- Hot Spot
- Heat Map
- Graphic Slider
- Gap Analysis
- Drill Down
- NPS Net Promoter Score®
- Timing
- Meta Info Question
- File Upload
- Use Captcha Item to Submit Survey
- Captcha Verification
EDIT YOUR SURVEY

How to EDIT a survey
• Click the Edit Survey tab
• Select the survey you want to edit!
DISTRIBUTE YOUR SURVEY

What can you do with Qualtrics?
DISTRIBUTE ANONYMOUS LINK OR EMAIL SURVEY

• For ANONYMOUS data
  • Launch survey and email or post the link to a website or other social media so ANYONE can take the survey. Unless you ask for participants’ identifying information, survey responses will be anonymous.

Your Anonymous Survey Link:

https://uarizona.co1.qualtrics.com/SE/?SID=SV_0c66lvyBSRXrYu0d

You can copy this link, then paste it into an email or website.

Note: This will not track identifying information. If needed, try our SurveyMailer.
**DISTRIBUTE USING QUALTRICS SURVEY MAILER**

**Research Questions**

**Name of Survey**

Select a “Panel” (list) of emails you’ve already created OR create a panel by clicking here.

**When:** Schedule when to send or send now.

**Message:**

- From Address: no-reply@email.arizona.edu
- From Name: Karen C Spar-Ellinwood
- Reply-To Email: kse@email.arizona.edu
- Subject: 

Qualtrics will automatically input your email and name per your UA Net ID.

Qualtrics will automatically load the survey link with basic survey message. You can add your own message here and use special formatting toolbars, if desired.
CREATE PANELS (EMAIL LISTS) TO DISTRIBUTE SURVEYS

Create, save and edit email lists for survey distribution

<table>
<thead>
<tr>
<th>Panel</th>
<th>Last Used</th>
<th>Members</th>
<th>Panel Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unassigned</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015-05-26 12:18:52</td>
<td>May 26, 2015 12:23PM</td>
<td>2</td>
<td>Export Panel, Embedded Data, Move Panel, Send Email</td>
</tr>
<tr>
<td>KSE</td>
<td>May 28, 2015 9:55AM</td>
<td>2</td>
<td>Export Panel, Embedded Data, Move Panel, Send Email</td>
</tr>
<tr>
<td>New Panel 2015-09-22 15:4:52</td>
<td>Sep 22, 2015 3:05PM</td>
<td>1</td>
<td>Export Panel, Embedded Data, Move Panel, Send Email</td>
</tr>
<tr>
<td>SOS Panel</td>
<td>Dec 9, 2014 10:05AM</td>
<td>6</td>
<td>Export Panel, Embedded Data, Move Panel, Send Email</td>
</tr>
</tbody>
</table>
ADD, IMPORT & UPDATE PANEL MEMBERS

- Create the email recipient list by clicking +Create New Panel.
- Name the list
- You can save it to a folder or create new folder, then click CREATE!

In Qualtrics, click the option you want. Import from spreadsheet or prior survey panel, OR add manually.
VIEW & ANALYZE RESULTS

What can you do with Qualtrics?
If it’s anonymous – you will see a randomly assigned alpha-numeric code for each survey respondent.

Start time and End Time displayed here.

How long respondents spent taking the survey (at least, how long their browser was open to the survey window).
Select a Report

Click on the name of the report that you want to view.
You can also Create a New Report.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Creation Date</th>
<th>Last Modified</th>
<th>Owner</th>
<th>Delete</th>
</tr>
</thead>
</table>
ANALYZE RESULTS: FILTER REPORTS

1. Teaching Scholars Education Phil...

   - Initial Report
   - My Report
   - New Report

   Show Filters... Drill Down...

   Questions

   1. Please indicate your first and last name

   2. Please submit your education philosophy. {NOTE: It would be a good idea to draft this in word, th...}

   Add a Filter to This Report...

2. 1. Please indicate your first and last name

   Question
   Select Question...
ANALYZE RESULTS: FILTER REPORTS

• Why would you filter your results?

• Filtering is a type of analysis where you can explore trends in the data.

• For example, you could track for respondents who answered X on one ITEM, how did they respond to all the other items?
ANALYZE RESULTS: CROSS TAB ANALYSIS & REPORTS

Item Types
- Multiple Choice
- Matrix Questions
- Embedded data

Help and Tutorials
Click on question type to view Qualtrics tutorials
How satisfied were you with the following aspects of the service?

<table>
<thead>
<tr>
<th></th>
<th>Very Dissatisfied</th>
<th>Dissatisfied</th>
<th>Neutral</th>
<th>Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speed of resolution</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Knowledge of representative</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solution offered</td>
<td></td>
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HELP & TUTORIALS
PRACTICE!

Create a survey with at least one of following types of questions:

• Multiple choice
• Ranking item
• Visual analog scale
• Text - open-ended question

• Distribute the survey to the SOS Group
• Respond to everyone else’s survey
• Practice Viewing & Analyzing Results and Creating Reports
BEFORE LAUNCHING YOUR SURVEY, PLEASE CONSIDER THESE ISSUES

- IRB issues - Does the data need to remain...
  - Anonymous, that is, data should contain no unique identifiers?
  - Confidential, that is, data might contain unique identifiers but you must maintain the secrecy of these identifiers (you cannot disclose data with unique identifiers)?
  - [Use this Feature: Distribute Surveys, above]

- Time limits for
  - respondents to take the survey (duration)
  - Survey administration (how long is survey open)
  - [Use this Feature: Survey Options, next page]

- Survey display features
  - Do you prefer 1 question per page? 1 block of questions per page?
  - Would you like to add a header with Survey title or a footer with the IRB #, etc?
  - [Use this Feature: Look & Feel, page after next]
SURVEY OPTIONS

Select options for HOW respondents will interact with your survey by clicking the Survey Options button.

- Back button
- Question numbers
- Limit to 1 survey per person
- Save incomplete survey responses for certain time
- Create custom messages
LOOK & FEEL

- Page transitions
- Select next and back button displays
- Choose to highlight active question when 2 or more items are displayed per page
- Select # of items to display per page
- Select template for UA or CoM
Practice using the survey tool and view the Qualtrics video tutorials online for guidance in creating, editing and distributing surveys.

Click the hyperlinks below to view the tutorials.

**Getting Started w/Qualtrics - Basics**
- Create a survey
- Create specific questions
- Question Types
- Collaborating with Others (setting permissions regarding access to data, analysis, etc.)

**Distributing Surveys**
- Activating a survey
- Anonymous survey link

http://softwarelicense.arizona.edu/qualtrics