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Introduction to Qualtrics

Starting from Scratch

September 28, 2021

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[Qualtrics.msu.edu](https://qualtrics.msu.edu)

Login using your MSU NetID and password.

This create an account for you in the MSU Qualtrics license

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Issues to keep in mind when designing and creating a survey

- What do you need from your data set?
 - Respondent email/identification?
 - Should respondents be able to revise their responses?
- Security
 - If you don't need the data, don't collect the data
- Accessibility
 - Can users with a visual disability take your survey?
 - Radio buttons vs Selection bars
 - Have your survey automatically checked for accessibility by using the tool provided under Tools>Review>Check Survey Accessibility
- Mobile compatibility
 - Some question types are not mobile-friendly

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Getting Help

- Click on Help in upper right corner
- Click on either the Qualtrics Support or Qualtrics Community

Help



Qualtrics Support is your one-stop shop to learn how to use any part of the Qualtrics Platform. An entire library of articles, manuals, and troubleshooting tools - right at your fingertips.

Qualtrics Support

Qualtrics Community

Need a bit more personalized help? [Contact Support](#). We'll get you an answer as quickly as possible.

Close

XM ☰

+ Add new folder

All projects 211

< ☐ ☰ ☰ Status ▾

Help options



Search projects...

Create new project

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Getting Started

Home screen is your Project Dashboard. Lists surveys and how you've organized them

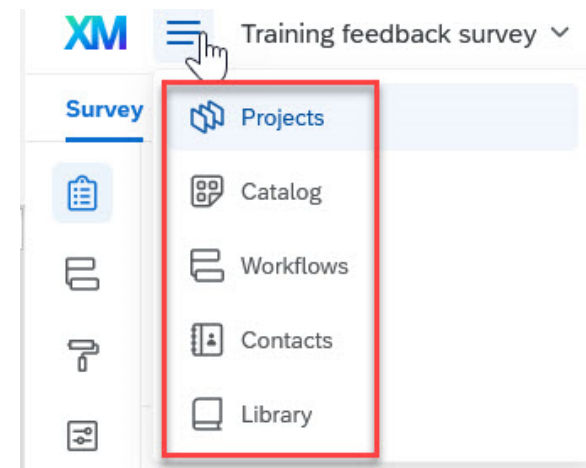
The screenshot displays the XM Project Dashboard. On the left is a sidebar with a search icon and a list of folders: '+ Add new folder', 'All projects' (211), 'Shared with me' (46), 'Uncategorized' (26), 'Archive' (2), 'Client Services' (3), 'Client surveys' (10), 'EAB - Learning Analytics' (4), 'Personal' (5), and 'Student Evaluations' (8). The main dashboard area features a search bar labeled 'Search projects...' and a blue 'Create new project' button, which is circled in red. Below this is a section titled 'Active projects' containing a table of survey data:

Survey	Status	Questions	Responses	12 day trend
Information Technology Readiness Form - 092820 ★ Modified Sep 6, 2021	Active	31	2.0k	
DEI Steering Committee- DEI Inventory Survey (MAUs/Colleg... ★ Modified Aug 12, 2021	Active	34	...	12 day trend
Vendor Covid agreement ★ Modified Mar 8, 2021	Active	5	50

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The menu for the XM platform includes

- Projects - your surveys
- Catalog - survey templates
- Workflows - actions attached to your surveys
- Contacts - your mailing lists
- Library (where you store your graphics, files, messages and surveys that you've created as templates)



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Survey builder is where you will spend most of your time. It's the menu option that allows you to add and edit Your survey's questions.

Survey builder

The screenshot shows the 'Survey builder' interface with the 'Survey' tab selected. The 'Edit question' option is circled in red. The 'Question type' dropdown menu is open, showing 'Multiple choice' selected. The 'Answer type' section has 'Allow multiple answers' selected. The 'Choices' section shows 'Number of choices' set to 5.

Survey builder

Survey Workflows Distributions Data & Ar

Edit question

Question type

Multiple choice

Answer type

Allow one answer

Allow multiple answers

Choices

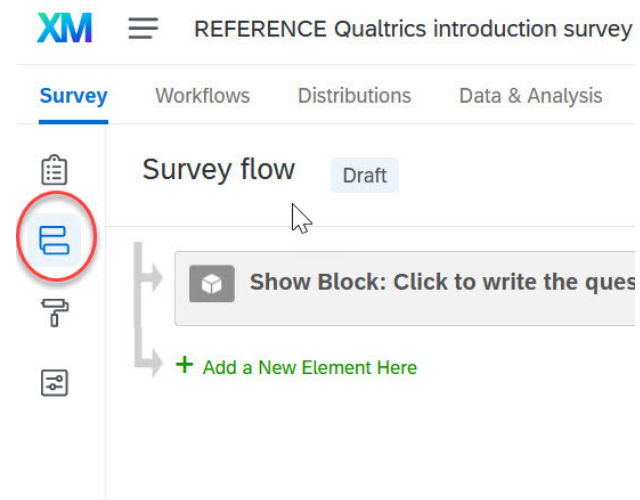
Number of choices

- 5 +

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Survey flow allows you to set up sophisticated pathways in your survey.

Survey flow

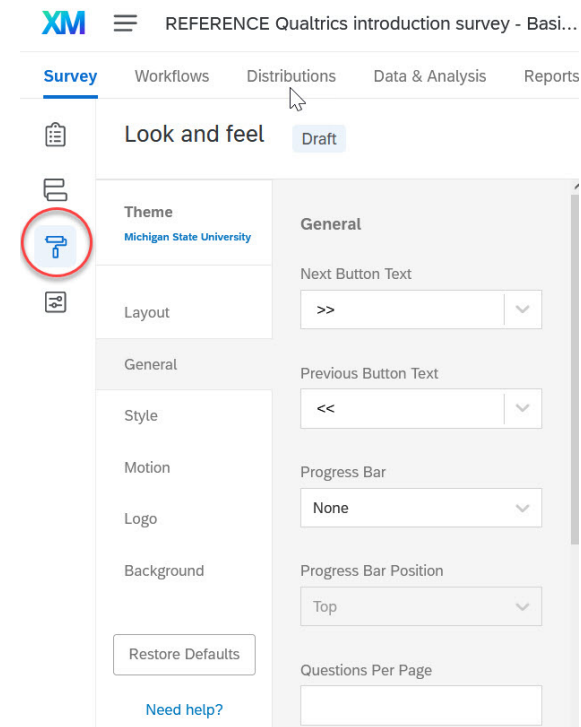


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Look and feel is where you can make changes to how your survey looks.

Items such as fonts, colors, templates and motion effects can all be found here.

Survey look and feel



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Survey options allows you to set up ways your survey can be accessed, certain features for the responses you get, security, and post-survey actions.

The choices for advanced features like quotas, scoring and other options are also found here.

Survey options

The screenshot shows the 'Survey options' menu in Qualtrics. At the top, there is a navigation bar with the XM logo, a hamburger menu icon, and the text 'REFERENCE Qualtrics introducti'. Below this is a sub-navigation bar with 'Survey' (highlighted with a blue underline), 'Workflows', 'Distributions', and 'Data & A'. The main menu items are:

- Options** (with a clipboard icon):
 - General** (highlighted with a blue background): Language, title, survey description
 - Responses**: Survey expiration, incomplete responses, back button and more
 - Security**: Passwords, file uploads, bot detection and more
 - Post-Survey**: Thank you emails, completed survey messages, and triggers
- Advanced** (with a plus icon):
 - Scoring**: Attach point values to specific answers
 - Quotas**: Set conditions you want responses to meet
 - Translations**

A right-side scrollbar is visible on the menu.

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Creating Your Survey

When you create a new project:

- Opens with a default Multiple Choice question
- LOTS of question types available
- Hovering over a question type allows you to see samples

Edit question

Tools ▾ Saved 11/15/2018 Draft

Question type

☰ Text / Graphic ▾

- ☰ Multiple choice
- ☒ Text entry
- ☰ Text / Graphic
- ☰ **Matrix table**
- ☒ Slider
- ☒ Form field
- ☰ Rank order
- ☰ Side by side
- ☒ Not promoter score

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Matrix table

Matrix table questions combine multiple questions with the same answer choices into a single table.

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Preview/Testing and Distributions

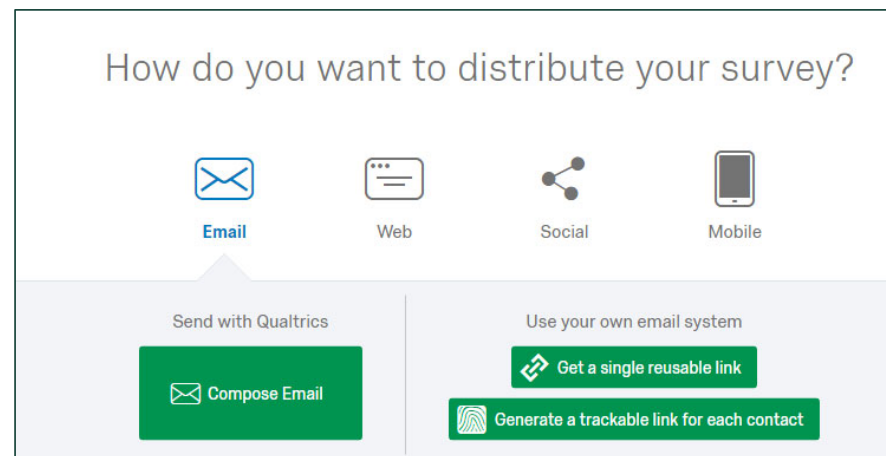
- Testing
 - Check both the regular and mobile versions. Some question types are not mobile-friendly (matrix tables)
 - Develop a Contact list of helpful testers
- Distributions
 - Anonymous links
 - Email distribution
 - Via Contact list in Qualtrics Mailer
 - Personal links sent from your own email address via a mail merge
- Others
 - SMS
 - Social Media
 - QR code

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Distributing Your Survey

Click on the Distributions Tab

- Most common method likely will be via Email
- You can also post a link on a website, social networks, or send a text message



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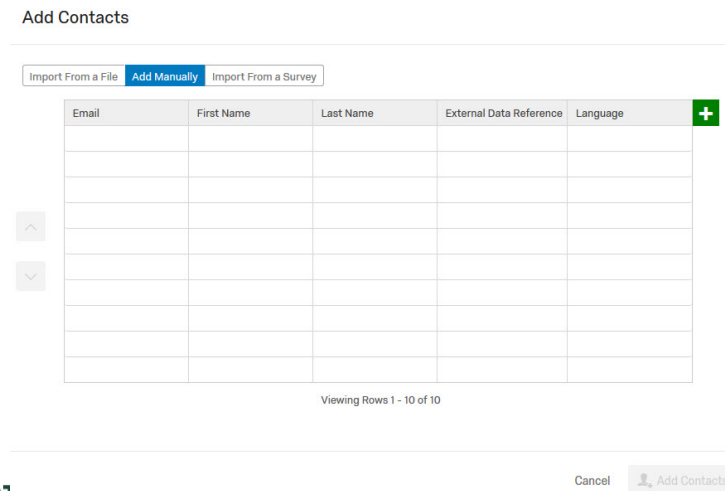
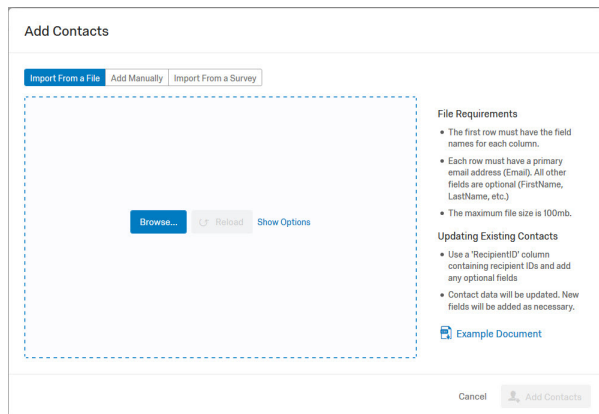
Distributing Your Survey via Email

Distribution Type	Pros	Cons
Qualtrics mailer	<ul style="list-style-type: none"> • Easily track who has/has not responded • Automate reminders and thank you emails 	<ul style="list-style-type: none"> • Some spam filters might see this as spam • Have to create a contact list within Qualtrics
Your own email with Personal Links	<ul style="list-style-type: none"> • Shows as coming directly from you • Less likely to be tagged by spam filters 	<ul style="list-style-type: none"> • Can be more difficult to track who has or has not responded • Cannot automate reminders, etc
Anonymous link	<ul style="list-style-type: none"> • Easy to send • Anyone can respond 	<ul style="list-style-type: none"> • Anyone can respond • Unless you specifically ask for it in your survey, you don't know who responds

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Distributing Your Survey with a Qualtrics Contact List

- Two ways to do it
 1. Upload a .csv (comma space delimited) file from Excel with your contact information.
 - Email is the only item required. Any other data is optional
 - If you have info other than first name, last name, and email, you must use exact titles when accessing data later
 2. Type the list manually



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Data & Analysis/Reports

- Overview of Data & Analysis tab
 - How to view additional columns from your Contact list
 - Export and import
 - Editing responses
 - Filtering
- Reports
 - Changing visualization type
 - Creating a new report

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Analyzing Results

Qualtrics has robust analysis capabilities. For example:

- Frequencies and distributions
 - Means
 - Choice counts
 - Percentages
 - Sums
 - Standard deviations
- Cross tabulations
- Basic coding – for open-ended questions
- Weighting

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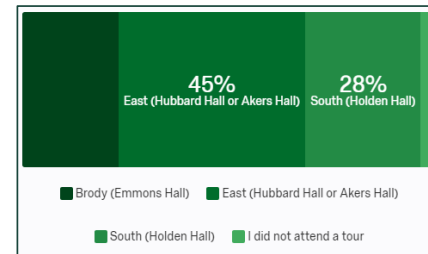
Reporting Results

Qualtrics will automatically create visualizations of your results. For example:

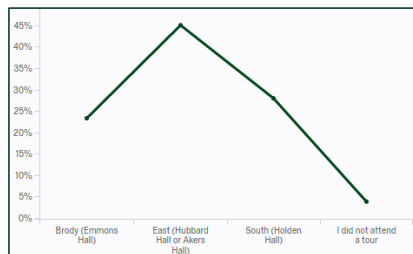
Table

Brody (Emmons Hall)	23%
East (Hubbard Hall or Akers Hall)	45%
South (Holden Hall)	28%
I did not attend a tour	4%

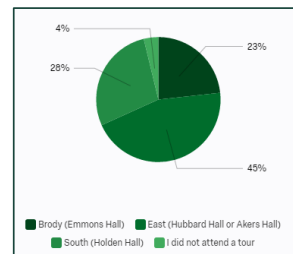
Breakdown bar



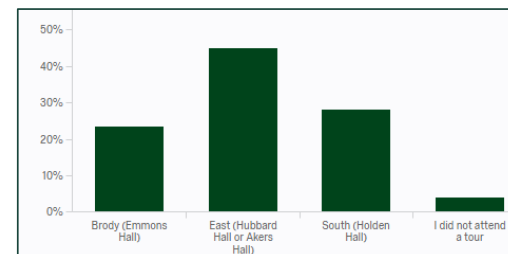
Line chart



Pie chart



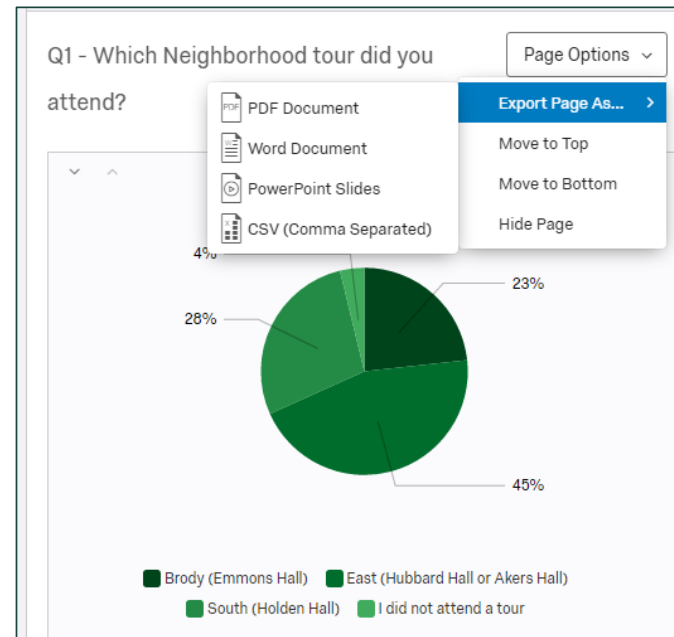
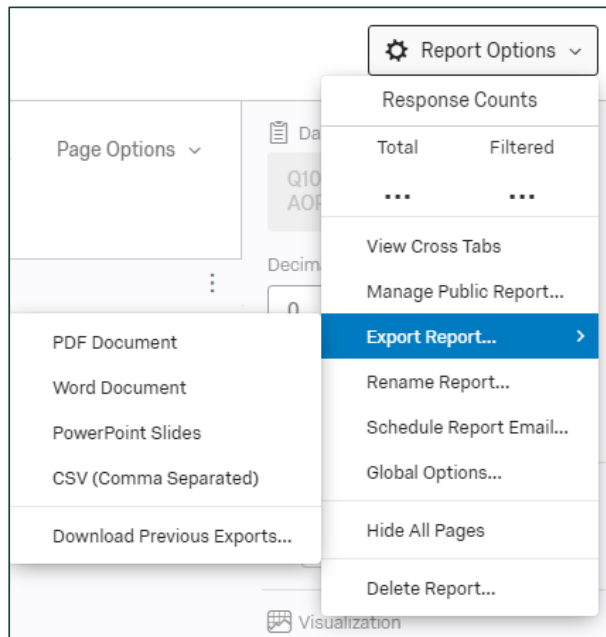
Bar chart



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Exporting Your Results

You can export your entire report or specific questions/pages. Each question is considered a separate page in the default report.



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Creating a registration survey using anonymous link distribution and a Contact List trigger

Step-by-Step

Setting up this action in your survey will allow you to use an anonymous link and still capture attendee email information in a contact list for future use.

1. On your Projects tab, click the green New Project button
2. Select Blank Survey Project
3. Give your survey a title
4. Click on the default multiple choice question already in your survey and change it to a Descriptive Text question. Add information about your event.
5. Add a multiple choice question that asks your respondent if they will attend your event below with 2 choices available. Type Yes and No as your options.
6. Add a Text Entry question, selecting the Form option and add whatever fields you want to gather from your respondent. Don't use Email Address (we'll create that field next)

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Creating a registration survey using anonymous link distribution and a Contact List trigger (con't)

7. Add another Text Entry question, selecting the Text Type of Single Line
8. Under Content Type, select Email Address
9. From the Tools menu, select Triggers>Contact List Triggers
10. The Triggers window will open and assume you want to Add Respondent to Contact List on Survey Complete.
11. Click the Please Selection button next to Contact List. Select My Library and click the New Contact List. Fill in the name you want the Contact List to have then click Save. When your respondents fill out the survey, their information will be added to this Contact List
12. Select the fields that you want added to the Contact List; select the form question in your survey that has the field information. First name for First Name, etc. You do not need to use the External Data Reference or Language fields. (see samples on next page)
13. When complete, click the green Save Triggers button.

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Triggers

Triggers Add Respondent To Contact List On Survey Complete: [Add a Condition](#)

Contact List:

First Name:

Last Name:

Email:

External Data Reference:

Language:

[Add additional fields](#)

[Finish Editing](#)

[Add Another Trigger](#)

[Close Without Saving](#) [Save Triggers](#)

Triggers

Triggers Add Respondent To Contact List On Survey Complete: [Add a Condition](#)

Contact List:

First Name:

Last Name:

Email:

External Data Reference:

Language:

[New Contact List...](#)

[Finish Editing](#)

[Add Another Trigger](#)

[Close Without Saving](#) [Save Triggers](#)

Triggers

Triggers Add Respondent To Contact List On Survey Complete: [Add a Condition](#)

Contact List:

Update existing list members

Unsubscribe the list member

First Name:

Last Name:

Email:

External Data Reference:

Language:

Department = Primary MSU ...it or Office

[Finish Editing](#)

[Add Another Trigger](#)

[Close Without Saving](#) [Save Triggers](#)

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Please feel free to email me if you have questions or need help!

- Michelle Carlson – mcarlson@msu.edu

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Training feedback survey



Or <https://bit.ly/2GPBuMe>

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