Getting Started with Qualtrics
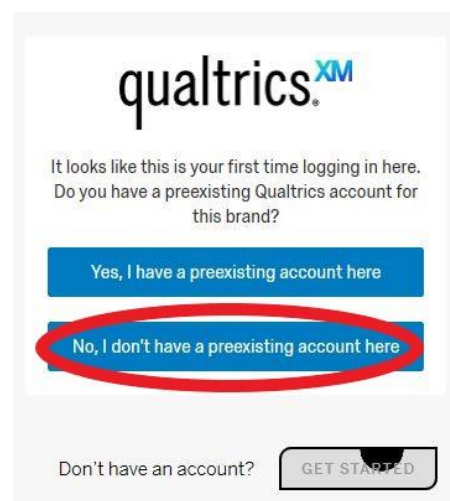
MU Division of Student Affairs

Contents

Overview

MU Student Affairs Strategic Initiatives and Assessment has transitioned away from using the CampusLabs Baseline survey software and into Qualtrics. Student Affairs members will be added to a license which upgrades your access to Qualtrics, allowing you to create and administer multiple surveys with a wide variety of question types, formatting options, and analysis tools.

Creating an Account

If you have not ever logged in to Qualtrics, you will need to **create** an account. Only after you create an account will we be able to add you to the division license.

1. Visit https://missouri.qualtrics.com
2. Enter your UM user ID and password
3. Click "No, I don't have a pre-existing account here"
4. You will then be prompted to sign in. Click "Sign in"
5. You should now be logged into Qualtrics. The Terms of Service will appear on the screen. Review the Terms of Service and then click **I Accept** in the lower right-hand corner. Your account is now created.

6. In the future, simply login at https://missouri.qualtrics.com with your Mizzou ID.

Division Administrators and Troubleshooting

As part of the Division License, all employees of Student Affairs will have their accounts nested under the "Student Affairs" umbrella. Administrators for the Division are: Ashli Grabau, Sarah Parsons, and Molly Frank. Assessment office staff are able to assist you with troubleshooting if you need it. Please note that this team does also have full access to your account. We will use this access **rarely**, but if you need us to, we can go in to make adjustments, view your projects if you need assistance with editing or changing settings, or give you access to surveys outside your project list. Additionally, in the event of staff turnover, we are able to transfer key surveys between accounts so that projects are not lost as people leave or change positions.

Using Qualtrics Support

Most questions you have about Qualtrics should be addressed first by visiting the Qualtrics support site, which has robust instructions on almost any issue you might encounter. You can also get personalized help by reaching out to Molly Frank via Teams chat, email, or cell (913-972-0933, 10AM-7PM Central).

If you would like to schedule a one-on-one walkthrough of Qualtrics or would like other instruction you can contact Molly as well.

Quick links to key Qualtrics support sites

-   Projects Basic Overview
-   Survey Basic Overview
-   Distributions Basic Overview
-   Reports and Results Basic Overview
-   Data & Analysis Basic Overview
-   Question Types

Basic Survey Tools

Creating a Survey

The Assessment office is available to build surveys for you. This may be helpful if you have especially large projects that you need assistance with or need to replicate from prior Baseline surveys. We can also troubleshoot smaller surveys or talk about how best to build new ones. If you'd like to build your own surveys, Qualtrics makes this very easy – it is much more user-friendly than Baseline in terms of speed and design.

To create a brand new survey project:

1. Visit the "Projects" page (this is your home page on Qualtrics when you log in).
2. At the top right, click "Create New Project."
3. Select "Survey" then "Get Started" when prompted
4. Name your survey, put it into a folder (you begin with only one folder, "Uncategorized" but can add folders to organize your surveys if you want), and choose "Create a blank survey project"
5. Select "create project"

6. You will be automatically taken to the "Survey" tab of your new project. From here you can begin to build the survey.

Building Your Survey

There are two key elements of Qualtrics surveys: Blocks and Questions. You can control both the content of these elements as well as how respondents move between them.
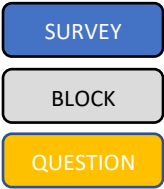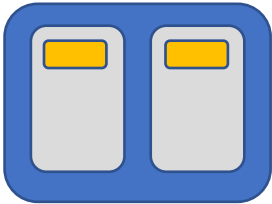
Blocks

All survey questions are created, edited, and stored inside blocks. Every survey includes at least one block initially called the Default Question Block. Blocks are a lot like "pages" in Baseline or Engage. They are questions grouped together.

You can edit the characteristics of your project at the Survey/Project level, at the Block level, or at the Question level. You can also edit branching and display logic between both Blocks and Questions.

To learn about Blocks in-depth, visit the Qualtrics support page here:
https://www.qualtrics.com/support/survey-platform/survey-module/survey-module-overview/#Blocks

Questions

Your survey will automatically have a multiple-choice question inserted into its Default Question Block.

You can **add** additional questions to a block using the "+ Add new question" button at the bottom of the block (1). You can also use the little "+" symbols on the corners of the question to add a new question above or below it (2). Finally, you can **delete** a question using the "-" button on the left of the question. Deleting a question will move it to a "trash" section that is at the bottom of the survey page, so you can recover or restore it later. This is a helpful failsafe 😊
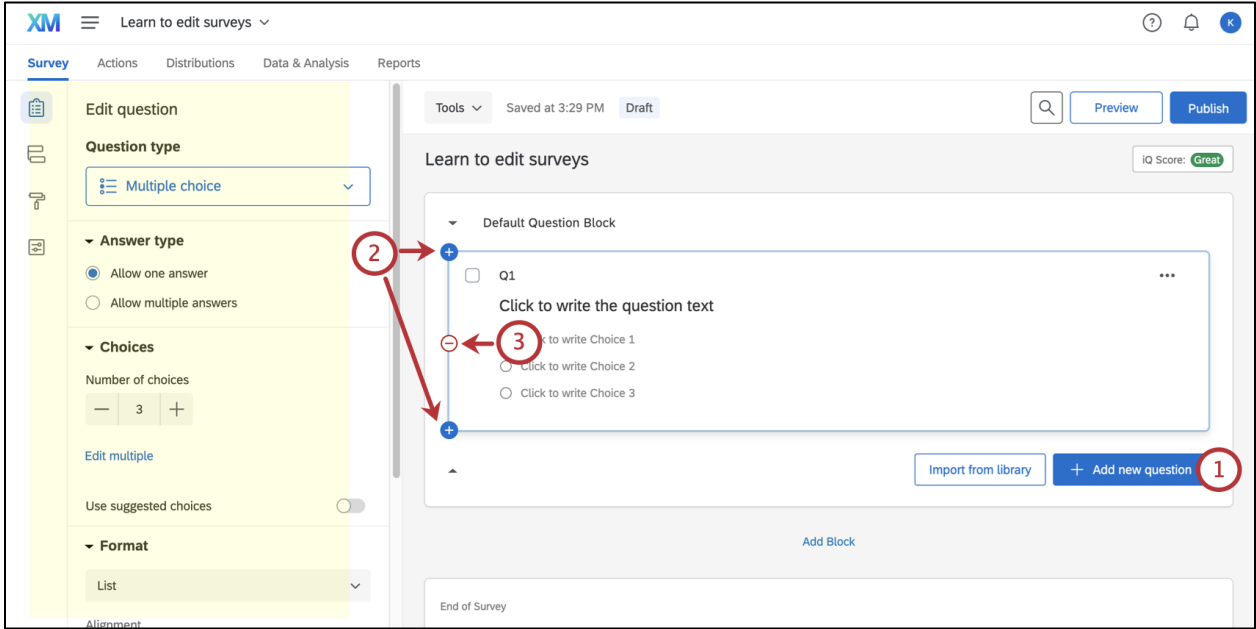
You can **move** questions by dragging and dropping them around in the survey.

You can **edit** questions by going to the editing pane (highlighted in yellow above). Here you can change the question type, the number of answer choices (click "edit multiple" to edit all choices at once using a text box), various formatting options, or even add display logic if you only want certain respondents to see a particular question.

We have prepared a survey template that is designed to allow you to explore survey building and question types. It has notes from Molly built into it with helpful tips. If you'd like to use that survey or a copy of it, you can send Molly an email or Teams message and she'll transfer a copy to your account.

If you want to get a better sense of the types of questions available to you, visit the Question Types guide in Qualtrics support - https://www.qualtrics.com/support/survey-platform/survey-module/editing-questions/question-types-guide/question-types-overview/

Distributing a Survey

The most common way to distribute a survey is either via an email mailing list OR via an anonymous link. You can access distribution links on the "Distributions" tab of the project's page.


As you can see in the highlighted section there are *a lot* of options for how to distribute. They can get pretty technical. An anonymous distribution link will work just fine in a lot of scenarios, but if you need to do large-scale distributions go ahead and contact the Assessment office and we can help you with the email or personal link tools – this also helps us keep track of how many big surveys are going out at a particular time and make sure that you're accessing the appropriate population for your purposes. We can also assist with formatting and ensuring your email doesn't get caught in spam filters.

Note also that you can view a timeline of recent responses. This is similar to Baseline.

Viewing Survey Results

There are basically two different ways you can view survey results. One is by downloading the raw data into a CSV or Excel file. The other is by using Qualtrics' built-in results viewing and reporting tool. There are benefits to either, depending on your needs.

1. *Exporting to a file* – this gives you the raw data in Excel or other file format (we recommend CSV or Excel). IF you need to import the survey into any sort of analysis platform or you need to copy data into a larger spreadsheet, choose this option. Here are the steps:
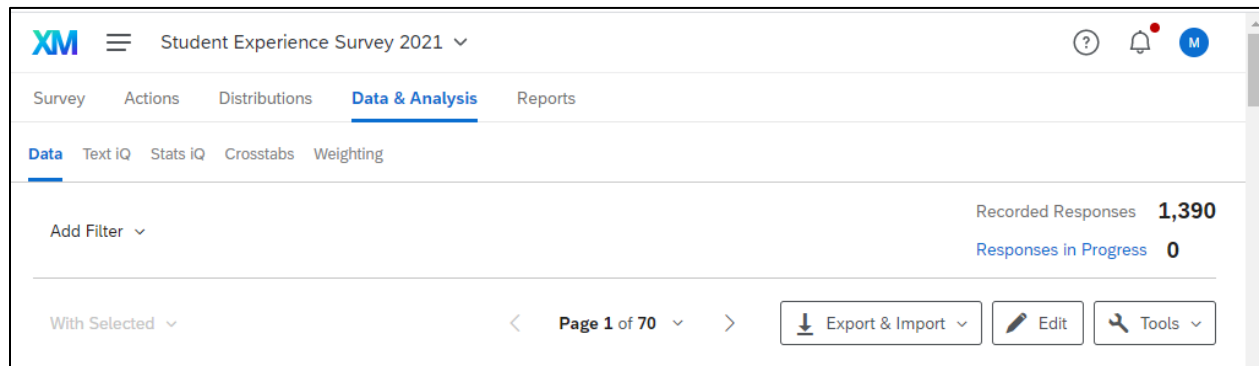
   a. Go to the "Data & Analysis" tab on the project page
   b. Under "Data" you will see the option to "Export and Import" the file
   c. Click this; in the dropdown menu click "Export Data"
   d. Select the file type you want to export
   e. You will see the option to export either numerical values or choice text. Select which you prefer.

      i. *If you have multiple choice options in your survey, they will have both numerical codes and text – for instance, "Very Satisfied" might be numerically coded as 5, while "Very Dissatisfied" is coded as 1. Exporting using the numerical values is usually best for quantitative analysis. However, if you want to simply see the text answer people selected, go ahead and export using choice text.*

   f. Download will begin; Qualtrics will let you know when it's ready. Make sure you save it to your shared drive or your desktop, especially if you make any cosmetic or other changes to the file. You can download as many times as you want for surveys that you own. IF you're a collaborator, you may not have download access. Contact Molly or the survey owner to troubleshoot this.
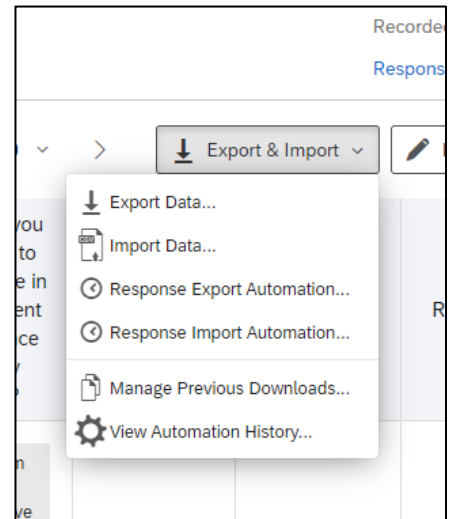
NB: On the "Data and Analysis" page you can also delete individual responses – this is helpful if you did some test runs, or if you have a lot of empty responses. We caution against deleting responses unless you are 300% sure that you want to delete them. It's generally safer to just exclude them from analysis.

2. *Using Qualtrics' reporting tool* – this option automatically gives you some visualizations for each of your survey question. It tends to default to bar graphs, but you'll also see respondent counts and percentages for each answer option on any given question. To access this, go to the individual project's page, and on the top horizontal menu click "Reports." You'll be taken to a "Results" dashboard. The best explanation of how to use the Results page as well as the Reports tool is available via the Qualtrics support platform at this link: https://www.qualtrics.com/support/survey-platform/reports-module/results-section/reports-overview/ We recommend exploring.

While the Qualtrics reporting tool is excellent, we highly recommend conferring with the Assessment office to develop or create in-depth reports based on your surveys. This is true especially if you need to integrate Student Information Systems data or other MU data to contextualize your results. Just reach out for help!

Adding Collaborators

Sometimes you'll want more than one person to be able to access a survey that you own. In this case, you can add collaborators and can control their level of access to the survey – much like giving someone "edit" or "view" access to a Google Doc, Qualtrics has similar settings you can toggle as needed.

1. To add a collaborator, simply enter the project and make sure you are on the "Survey" tab.
2. You should see a drop-down menu labeled "Tools." Select this and then navigate to the "Collaborate" option.
3. In the search bar, enter the last name of the person you wish to share with. **You will only be able to collaborate with people who have set up their MU Qualtrics account.**
4. Select the name of the person you want to share with and then make sure to click "Add"
5. This will trigger a message box with the option to send your collaborator a personalized message about the survey. If you don't personalize it, they'll just get a generic notification that you've shared with them.
6. Give them the permissions you'd like them to have (note that they will not be able to **delete** your survey)
7. MAKE SURE TO CLICK "SAVE"

Advanced Survey Options

You can feel free to contact the Assessment team for assistance with any of the following:

- Automated response reports sent to your email
- Scheduling follow-ups and reminders
- Complex survey distributions
- Survey analysis
- Connection of your survey results with division survey data or Student Information System data
- Programming your survey to collect metadata (student ID, pawprint, etc) without prompting the respondent
- Complex display logic and branching
- Optimizing survey for accessibility and user experience