KSU Qualtrics Insight

Survey Software
**Introduction**

Qualtrics is a survey development software offered for use to Kennesaw State University faculty and staff. This document is intended to serve as a quick getting started reference for creating a survey, learning how to distribute those surveys through emails, and how to view and export reports.

Qualtrics offers extensive support through documentation, tutorials, and telephone calls as part of our campus level of service. You may contact them at: 1-800-340-9194, or via online at [https://www.qualtrics.com/support/](https://www.qualtrics.com/support/).

**Objectives**

The following learning objectives are covered in this document:

- How to access KSU Qualtrics Insight
- Understanding the EULA
- How to log in
- How to create a survey
- How to distribute the survey through email
- How to view and export a report
- How to get application support through Qualtrics
- How to get survey building support through KSU A.L. Burruss Institute
How to Access Qualtrics

The following sections will explain how to access KSU Qualtrics, accept the EULA, and login:

1. To access KSU Qualtrics Insight, go to the following website: http://surveys.kennesaw.edu.

When you access Qualtrics, the KSU Qualtrics EULA (End-User License Agreement) page will appear. You must understand and agree to the EULA in order to gain access to KSU Qualtrics.

To accept the EULA:
1. Read the EULA.
2. Click the I Agree button.

Note: If you wish to request Qualtrics on behalf of a student, additional information is displayed below the I Agree button.
How to Log In

The following instructions explain how to log in to KSU Qualtrics:

1. Enter your NetID and NetID password in the area shown below (See Figure 2).
2. Click the Sign In button (See Figure 2).

My Projects Landing Page

When you first sign-in to KSU Qualtrics, the My Projects landing page will appear. In Qualtrics, surveys are now called Projects. The following shows the Qualtrics layout for a first-time user:

Note: Once you Create a Project, there will be additional options available to you.
Qualtrics User Interface

The following will show the user interface from the *My Projects* landing page:

1. **Projects**: Click here to access the My Projects landing page (See Figure 4).
2. **Create Project**: Click here to create a new survey/project (See Figure 4).
3. **Folders**: Click this button to activate the Folders Pane (See Figure 4).
4. **Folders Pane**: Contains all of your projects, anything shared with you, and also your personalized folders (See Figure 4).
5. **New Folder**: Click here to create a new folder (See Figure 4).
6. **Survey Options**: Click the drop-down to access options for a particular survey (Share, Copy, etc.) (See Figure 4).
7. **Account Settings/Logout**: Click here to access your account settings, or if you want to logout (See Figure 4).
8. **Help & Feedback**: Allows you access to help from Qualtrics University, Qualtrics Insight tutorials and contact information for Qualtrics (See Figure 4).
9. **Library**: Click here to access your library, which contains saved email templates, pictures, and documents (See Figure 4).
10. **Contacts**: Click here to access a list of your saved mailing contact folders (See Figure 4).
Creating a Project

1. From the My Projects landing page, click Create Project.

![Create Project](image)

**Figure 5 - Click Create Project**

2. The Create a Project pop-up window appears. Type a Project Name and select a Folder (optional) (See Figure 6).

3. Click Create Project (See Figure 6).

![Create Project](image)

**Figure 6 - Create Project**

4. The Survey Module appears. You are now ready to add questions to your survey.
Adding Questions

The following section will show how to add questions to your survey. As an example, we will add a multiple choice and short answer question to our survey.

1. From the Edit Survey tab, click the drop-down arrow next to + Create a New Question.

2. A pop-up will display multiple question types. Select your desired question type.
3. If you **hover your cursor** over any of the choices, an example will show on the right of the screen.

4. In this example, we will choose *Multiple Choice*. Click the **drop-down arrow** next to *Multiple Choice*. 
5. If you **hover your cursor** over any of the choices, an example will show on the left of the screen (See Figure 12).

6. In this example, we will choose *Single Answer, Vertical* (See Figure 12).
7. A **Default Question Block** will populate.

![Figure 13 - Default Question Block](image1)

8. Click **Click to write the question text** to type the question.

![Figure 14 - Click to Write the Question Text](image2)
9. The Text Editor appears. Type your **question** in the text area.

![Figure 15 - Text Editor](image15.png)

**Note:** For additional text formatting options and/or to insert an image, click the blue **Rich Content Editor tab**.

10. Once done, click **outside** of the Text Editor to save the question.

**Note:** KSU Qualtrics automatically saves your survey as you build it. There is no save button.

11. Click on **Click to write Choice 1** to type the first answer choice (See Figure 16).

![Figure 16 - Click to write Choice 1](image16.png)
12. *Choice 1* becomes editable. Type the **answer text**.

![Figure 17 - Choice 1 Answer Text](image)

13. Click outside of the answer text field to save the answer choice.
14. Repeat steps 11 through 13 to populate *Choice 2* and *Choice 3*.

**Note:** If you need to rearrange the order of the answer choices, click the **answer choice to be moved**, and then click the **drop-down arrow** for the *Move Up* and *Move Down* options.

![Figure 18 - Move Up & Move Down](image)
15. Once the answer text has been entered, you can make changes from the *Options* pane on the right side of the screen. You can change:
   a. **Question Type**: Change your item type here (See Figure 19).
   b. **Number of Choices**: The default is 3, but you can use the minus or plus signs to take away or add more choices (See Figure 19).
   c. **Answers**: You can select single, multiple, drop-down list, select box, or a multi-select box (See Figure 19).
   d. **Position**: You may choose to show your question vertically, horizontally, or in a column format (See Figure 19).
   e. **Validation Options/Type**: If selected, you may choose to Force Response or Request Response (See Figure 19).
   f. **Actions**: other actions that you can take, such as copying or previewing the question (See Figure 19).

![Figure 19 - Options Pane](image)

**Important**: Changing a question type after you have started collecting data will invalidate previous responses to that particular question.

16. To add more questions, click the **drop-down** next to *Create a New Question*, and repeat steps 2 through 15.

![Figure 20 - Create a New Item](image)
17. To delete a question, select the question that you wish to delete, and click the red minus sign.

![Figure 21 - Deleting a Question](image)

**Editing the Survey**

1. If you need to alter your questions, from the My Project landing page, click Edit Survey under the Tasks menu. This will take you to the Edit Survey tab.

![Figure 22 - Edit Survey](image)
2. From the *Edit Survey* tab, click on the *text* you wish to edit.

![Figure 23 - Text Edits](image)

3. After your edits are complete, click **outside of the edit window** to keep the changes. Qualtrics will autosave your changes.

**Note:** The survey will be locked for editing once an answer has been submitted by a survey participant.

**Activating & Distributing a Survey**

Once you have finished your edits, you will need to activate your survey. The following will show how to activate your survey by choosing a distribution method from the *Distributions* tab:

1. Select the **Survey** you wish to distribute from the *My Projects* page.
2. From the *Distributions* tab, click the **Distribute Survey** button.

![Figure 24 - Distribute Survey](image)
3. The *Distribute Survey* pop-up will appear. You can choose from the following options:
   
a. **Email**: This option allows you to compose an email and send using Qualtrics, or you can use your own email system and receive a single reusable link, or you can generate a trackable link for each contact.
   
b. **Web**: This option allows you to embed your anonymous survey link on a website.
   
c. **Social**: Use this option to post your survey to a variety of social media outlets/networks.
   
d. **Mobile**: The mobile option allows you to scan a printed QR Code with your mobile phone.

![Distribute Surveys Tab: Activate Survey](image)
Distributing the Survey via Email

As the section above explained, there are multiple options for distributing your survey. The following will demonstrate how to email your survey with instructions to send in one hour:

To email the survey:

1. From within your survey, click on the **Distributions tab** (See Figure 26).
2. Click **Distribute Survey** (See Figure 26).

3. From the **Distribute Survey** pop-up window, choose **Compose Email**. This option allows you to compose an email and send using Qualtrics, or you can use your own email system and receive a single reusable link, or you can generate a trackable link for each contact.
4. The *Compose Email* screen appears. Enter the necessary email information (See Figure 28). This includes:
   a. the recipients’ email address(es) (See Figure 28),
   b. the timing of delivery (See Figure 28),
   c. a subject line (See Figure 28), and
   d. the message you want your participants to receive, and any other additional email text, if desired (See Figure 28).

5. (Optional) When you are finished entering all of the necessary information, click the green **Save As** button (See Figure 28).

![Figure 28 - Enter Email Addresses & Timing of Delivery](image)

**Note:** The survey link will automatically populate in the message.

**Note:** Qualtrics generates a unique survey link for every email recipient. Never send surveys to a distribution list email address (e.g.: uits@kennesaw.edu) through Qualtrics’ email tool. Otherwise, everyone on that distribution list will receive the same survey link.
6. The Save As window appears. Click the drop-down to choose a library (optional) (See Figure 29).
7. Give your email a Name (See Figure 29).
8. Click Save Message (See Figure 29).

![Figure 29 - Email: Save]

9. Click the Send in 1 hour button to send the email at the scheduled time.

![Figure 30 - Schedule Mailing Button]
10. The Email History page will appear.

![Email History Page](image)

Figure 31 - Email History Page

11. If you click on the Actions menu drop-down button, you can edit distribution, schedule a reminder, schedule a Thank You message, download mailing history, and cancel and delete distributions.

**Note:** Qualtrics will remember who replies to the survey based on the links that are generated.

![Email History Actions Menu](image)

Figure 32 - Email History: Actions Menu
Viewing & Editing a Distribution

If your email hasn’t been sent out just yet, you can still make any changes to it that you deem necessary. If your email has already been sent, you will be unable to make any changes to it, but you do have the ability to see who it went to, when it was sent, and what message was used, as well as any of the other settings that you may have applied. The following will show you how to view and edit a distribution from the Distribute Survey tab.

To view a distribution:

1. From within your survey, click on the Distributions tab (See Figure 33).
2. Click Emails (See Figure 33).

![Figure 33 - Email History](image-url)
3. The Email History page appears. You can then view the details for that email distribution.

![Figure 34 - Viewing Email History](image)

**To Send Remind/Thank You Message:**

The following will explain how to send a Reminder Email in one hour:

1. Click Schedule Reminder or Schedule Thank You.

![Figure 35 - Schedule Reminder or Thank You](image)
2. Choose **when** to send it (See Figure 36).
3. Enter a **message** (See Figure 36).
4. Click **Send Preview Email** if you would like to make sure everything looks ok (See Figure 36).
5. If you are ready to send your message, click **Send in 1 hour** (See Figure 36).

![Figure 36 - Send Reminder Window](image)

**Note:** Reminders will only be sent to those who have not yet completed the survey.

**Note:** Thank You Messages will only be sent to those who have completed the survey.
6. The reminder will then appear below the distribution.

![Figure 37 - Reminder](image)

**To edit a distribution:**

7. From the Email History page, click on the drop-down arrow of the Actions menu next to the distribution you wish to edit (See Figure 38).
8. Click **Edit Distribution...** (See Figure 38).

![Figure 38 - Edit Distribution](image)
Viewing the Survey Results

Once the time period of your survey has ended, you can view the results by creating a report or by viewing responses. The following explains how to export the raw data of your survey from the Data & Analysis tab:

1. From the My Projects area, click the actions drop-down arrow next to the survey you wish to view results for (See Figure 39).
2. Click Data & Analysis (See Figure 39).

![Figure 39 – Data & Analysis](image)

3. You are now in the Data & Analysis tab.

![Figure 40 – Data & Analysis Tab](image)
4. To select a specific response, to see how that person answered the survey, click the *actions drop-down arrow*.

5. Click *View Response*.

![Figure 41 - Add Graph & Display Options](image)

6. The *Response Details* window will appear.

![Figure 42 - Response Details Window](image)
7. To export the entire report, click **Export & Import** (See Figure 43).
8. Then click **Export Data** (See Figure 43).

![Figure 43 - Export Report](image)

9. The **Export Data** window will appear. Select how you wish to export the data. For this example, we will select **Download Data Table**.

**Note:** If you wish to import this data back into Qualtrics at some point, you will need to select the option for **Export Data with Legacy Format**.

![Figure 44 - Export Data: Download Data Table](image)
10. Select the **file type** you wish to download (See Figure 45).
11. Click the **Download** button (See Figure 45).

![Download Data Table](image)

**Figure 45 - Download Data Table**

**Reports Module**

The Reports Module allows you to view, explore, and analyze your aggregate data from your surveys. The following will show you how to access this data:

**To access Reports:**

1. Click the **Reports** tab from within your desired survey.

![Reports Tab](image)

**Figure 46 - Reports Tab**
2. The Report Module will open. The following explains the reports page:
   a. **Page List**: Question pages are default pages made for each one of your survey questions.
   b. **Visualizations**: Interactive charts that represent the data collected for each question.
   c. **Visualization Type**: Click any chart icon to change how your visualization appears.

**Note**: You also have the option to create new custom pages that may help you freely explore and arrange your results.

![Figure 47 - Reports Module]
Closing the Survey
Once you are finished obtaining all of the results that you want from your survey, you should close the survey. The following will explain how to close a survey:

1. Navigate to the survey you wish to close. Click on the Distributions tab (See Figure 48).
2. Click Pause Response Collection (See Figure 48).

3. The Pause Response Collection window will appear. Selected one of the radio buttons. In this example we will choose the radio button for Close all active survey sessions and record them as partial data (See Figure 49).
4. Click Pause Response Collection (See Figure 49).
5. The survey will now show a status of **Closed**.

![Figure 50 - Closed Status](image)

**Note:** This will close ALL active surveys, regardless of if the participant has finished, and will record all of the answers as partial data. This will also close all email sessions.

**Exiting KSU Qualtrics**

1. To close your KSU Qualtrics session, click the drop-down next to your profile, in the upper-right corner of the screen (See Figure 51).

2. Click **Logout** (See Figure 51).

![Figure 51 - Exiting Qualtrics](image)
Survey Development Support
The Kennesaw State University A. L. Burruss Institute of Public Service and Research offers support in designing surveys. Below are some of the services offered:

Designing and fielding a good survey is a lot of work. It takes much more than just writing some questions and sending a link to people. To ensure that your survey will collect the most valid and reliable data possible, ask yourself the following questions:

- Are your survey questions worded such that they do not bias the response?
- Are your skip patterns in place to prevent unnecessary questions from being asked?
- Do your scales make sense?
- Should questions using the same scale be grouped together in a matrix format or should they be on separate pages to prevent confusion?
- Are there too many questions on one page, making the survey look longer than it actually is?
- Does the color scheme and font type/size make the survey easy to read?
- Have you created your respondent database?
- Have you composed your initial email invitation to participants?
- How often/how many reminder emails will you send to participants?

These questions and many more must be addressed if you hope to collect good data for your survey. The Burruss Institute of Public Service and Research at KSU has been creating surveys for 25 years. While there is a fee for these services, it is negotiable and often preferable over designing and maintaining the survey on your own.

The Institute will work with you in creating your survey instrument, field your survey, distribute all email invitations and reminders, maintain your database, export the raw data and deliver it to you in a format of your choice (Excel, SPSS, CSV, etc.), and provide a detailed report of findings.

If you would like to discuss your project, please contact Paul Vaughn at pvaughn2@kennesaw.edu

Qualtrics Support
Telephone Support – 1-800-340-9194
Online Support - http://qualtrics.com/university/researchsuite/

Additional Help
For additional support, please contact the KSU Service Desk:

KSU Service Desk for Faculty & Staff
- Phone: 470-578-6999
- Email: service@kennesaw.edu
- Website: http://uits.kennesaw.edu