KSU Qualtrics Insight
Survey Software
University Information Technology Services

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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/.

Objectives
After completing the instructions in this booklet, you will be able to:

- Access KSU Qualtrics Insight.
- Complete the EULA.
- Log in to Qualtrics.
- Create a survey.
- Distribute the survey through email.
- View and export a report.
- Receive application support through Qualtrics.
- Obtain 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.

Note: 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.

![KSU Qualtrics EULA](image)

**Figure 1 - KSU Qualtrics EULA**

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).

![Figure 2 - Log In](image)

**Note:** If you have never logged in to Qualtrics before, you will see the following screen.

3. Click **I don’t have a Qualtrics account**.

![Figure 3 - First-Time Login](image)

4. The **Terms of Service** screen will appear. Read through the terms and click **I accept**.

![Figure 4 - Terms of Service](image)
Qualtrics User Interface

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

![Image of Qualtrics User Interface]

**Figure 5 - Qualtrics User Interface**

1. **Hamburger Navigation**: Click this button to view your Projects, Catalog, Actions, Contacts, or Library (See Figure 5).
2. **All Folders**: Add a new folder, sort your projects, shared projects, and personalized folders (See Figure 5).
3. **Project Sort**: Click the drop-down to sort your projects by category (See Figure 5).
4. **Help & Feedback**: Access help from Qualtrics University, Qualtrics Insight tutorials and contact information for Qualtrics (See Figure 5).
5. **Notifications**: View any activity notifications within your Qualtrics account (See Figure 5).
6. **Account Settings/Logout**: Access your account settings, or if you want to logout (See Figure 5).
7. **Create Project**: Create a new survey/project (See Figure 5).
8. **Survey Settings**: Click to activate, copy, or edit a survey and more (See Figure 5).

Creating a Project

When you first sign-in to KSU Qualtrics, the All Projects landing page will appear. In Qualtrics, surveys are now called Projects. The following shows the Qualtrics layout for a first-time user:
1. To get started, select **Create new project** (See Figure 6).

![Figure 6 - Create Survey Project](image)

**Note**: Once you click **Create new project** there will be additional options available to you.

2. The **Catalog** pop-up window will appear. Under the heading **Projects from scratch**, select the **Survey** box (See Figure 7).

![Figure 7 – Create New Survey](image)

3. A sliding menu on the right-hand side of the screen will appear. Scroll down, then click **Get Started** (See Figure 8).
4. The survey window will appear. First, type the name of your project into the **Name** field (See Figure 9).

5. Next, select the dropdown menu, then choose from the following selection (See Figure 9):
   a. Create a blank survey project
   b. Import a QSF file
   c. Copy a survey from an existing project
   d. Use a survey from your library

**Note:** For this example, select the **Create a blank survey project** button from the dropdown menu.

6. Select **Create project** (See Figure 9).
7. The Survey Module appears. You are now ready to add questions to your survey (See Figure 10).

![Figure 10 - Survey Module](image)

Adding Questions

The following section will show how to add questions to your survey. **Note:** All new surveys offer multiple-choice questions by default.

1. From the Survey tab, click the **drop-down arrow** next to Multiple Choice (See Figure 11).

![Figure 11 - Create a New Question](image)
2. A pop-up will display multiple question types. Select your desired question type (See Figure 11).
3. If you hover your cursor over any of the choices, an example will show on the screen (See Figure 11).
4. In this example, we will choose Multiple Choice. Click the drop-down arrow next to Multiple Choice (See Figure 12).

![Figure 12 - Multiple Choice Drop-Down Arrow](image)

5. When you select any of the available answer choices, the left-hand panel underneath the dropdown menu will display additional settings. The Options pane on the right side of the screen displays the following settings:

![Figure 13 - Multiple Choice Drop-Down Arrow](image)
a. **Answer Type**: Use the radio buttons to select either allow one answer or to allow multiple answers (See Figure 13).

b. **Number of Choices**: The default is 3, but you can use the plus or minus signs to add or remove choices (See Figure 13).

c. **Use Suggested Choices**: Toggle to populate choice suggestions; use the dropdown menu that populates upon selection to select answer choices (See Figure 13).

d. **Format**: You can format the question as a list, dropdown, or selection box. Use the Alignment section to display your question vertically, horizontally, or in a column format (See Figure 13).

e. **Validation Options/Type**: If selected, you may choose to **Force Response** or **Request Response** (See Figure 13).

f. **Actions**: other actions that you can take, such as copying or previewing the question (See Figure 13).

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

6. A **Default Question Block** will populate (See Figure 14).

7. Select **Click to write the question text** to type the question (See Figure 15).
8. The Text Editor will appear. Type your **question** in the text area (See Figure 16).

![Figure 16 - Text Editor](image)

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

9. 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.

10. Next, add text to your answer choices.
   a. Select the **Click to write Choice 1** field to type the first answer choice.
   b. Select the dropdown arrow next to the entry field for additional options.

![Figure 17 - Click to write Choice 1](image)

11. Click outside of the answer text field to save the answer choice.

12. Repeat steps 10 through 11 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 to access the Move Up and Move Down options (See Figure 18).

13. To add more questions, click the button labeled Add new question.

14. To delete a question, navigate to the question that you wish to delete, click the More Options (…) button, then select Delete from the associated drop-down menu.
Editing the Survey

1. If you need to alter your questions, from the All Projects landing page, click Edit Survey under the Tasks menu of the survey you wish to edit. This will take you to the Edit Survey tab (See Figure 21).

![Figure 21 - Edit Survey](Image)

2. From the Edit Survey tab, click the text you wish to edit (See Figure 22).

![Figure 22 - Text Edits](Image)

3. After your edits are complete, click outside of the edit window to keep the changes. Qualtrics will auto-save 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 steps 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 All Projects page.
2. Click the Distributions tab.

3. The Distribute Survey options screen will appear. You can choose from the following options:

   a. **Email**: This option allows you to compose an email to send using Qualtrics or use your own email system by receiving a single reusable link or generate a trackable link for each contact (See Figure 24).
   b. **Web**: This option allows you to embed your anonymous survey link on a website (See Figure 24).
   c. **Social**: Use this option to post your survey to a variety of social media outlets/networks (See Figure 24).
   d. **Mobile**: The mobile option allows you to scan a printed QR Code with your mobile phone (See Figure 24).
   e. **Online Panel**: Find respondents that meet specific demographic criteria (See Figure 24).
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 25).
2. Select the **Distribute survey** button in the right-hand corner of the screen (See Figure 25).

![Figure 25 - Distribute Survey Tab](image)

3. You have the following email options available (See Figure 26):

![Figure 26 - Distribute Survey Tab](image)

   a. Compose Email
   b. Get a single reusable link
   c. Generate a trackable link for each contact

4. From the **Distribute Survey** pop-up window, choose **Compose Email**. This option allows you to compose an email to send using Qualtrics or use your own email system by receiving a single reusable link or generate a trackable link for each contact.
5. The **Compose Email** screen appears. Enter the necessary email information (See Figure 31). This includes:
   a. **Select Contacts**: The recipients’ email address(es) (See Figure 27),
   b. **When**: The timing of delivery (See Figure 27),
   c. **Subject**: A subject line (See Figure 27), and
   d. **Save As**: The option to save a copy of your message in your Library (see Figure 27).
   e. **Message**: The message you want your participants to receive, and any other additional email text, if desired (See Figure 27).

![Compose Email Screen](image)

**Figure 27 - Enter Email Addresses & Timing of Delivery**

**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. Click **Save As** to save a copy of your email; the **Save As** window will appear. Click the **drop-down** to choose a library (optional) (See Figure 27).

![Figure 28 - Email: Save](image)

7. Enter a title for your email in the **Name** field (See Figure 28).

8. Click **Save Message** (See Figure 28).

9. Click the **Send in 1 hour** button to send the email at the scheduled time (See Figure 29).

![Figure 29 - Schedule Mailing Button](image)
10. The *Email History* page will appear (See Figure 30).

![Figure 30 - Email History Page](image)

**Viewing & Editing a Distribution**

If your email has not yet been sent out, 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 the **Distributions** tab (See Figure 36).
2. Click **Emails** (See Figure 36).

![Figure 32 - Email History](image)
3. The Email History page appears. You can then view the details for that email distribution.

To edit a distribution:

1. Click the drop-down menu button to edit distribution, schedule a reminder, schedule a Thank You message, download mailing history, and/or cancel and delete distributions (See Figure 31).

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

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.
2. Choose **when** to send it (See Figure 35).
3. Enter a **message** (See Figure 35).
4. Click **Send Preview Email** if you would like to make sure everything looks ok (See Figure 35).
5. If you are ready to send your message, click **Send in 1 hour** (See Figure 35).

![Figure 35 - Send Reminder Window](image)

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

6. The reminder will then appear below the distribution (See Figure 36).

![Figure 36 - Reminder](image)
To edit a distribution:

1. From the Email History page, click on the drop-down arrow of the Actions menu next to the distribution you wish to edit, then click Edit Distribution… (See Figure 41).

![Figure 37 - Edit Distribution](image1.png)

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 All Projects area, click the actions drop-down arrow next to the survey you wish to view results for (See Figure 38).

2. Click Data & Analysis (See Figure 38).

![Figure 38 - Data & Analysis](image2.png)

3. You are now in the Data & Analysis tab (See Figure 39).
4. To select a specific response, to see how that person answered the survey, click the actions drop-down arrow (See Figure 40).
5. Click View Response (See Figure 40).

6. The Response Details window will appear.
7. To export the entire report, please do the following (See Figure 42):

   a. Click Export & Import (See Figure 42).
   b. Next, select Export Data from the dropdown menu (See Figure 42).

8. The Download Data Table window will appear. Select the file type you wish to export. For this example, we will select CSV (See Figure 43).

9. Click the Download button (See Figure 43).
**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.

   ![Figure 44 - Reports Tab](image)

2. The Report Module will open. The following explains the reports page:
   a. **Page List:** Question pages are default pages made for each survey question (See Figure 45).
   b. Create new custom pages to freely explore and arrange your results (See Figure 45).
   c. **Question Selection:** Select which question you want to see results for (See Figure 45).

   ![Figure 45 - Reports Module](image)

3. To change how your data visualization appears, select the data visualization page you wish to change.

   ![Figure 46 - Reports Module](image)
5. A sliding menu will pop-up on the righthand side of the screen. Scroll down (See Figure 46).

6. Select your preferred data visualization format.

7. Using the right-side sliding menu, scroll down to see additional options for customizing your data visualization. The following display options are available:

   a. **Display Options**: Customize the graph axis values and bar labels.
   b. **Color Palette**: Change the colors of your bar graph as well as the axis values.

8. Changes are saved automatically.
Closing the Survey

Once you are finished obtaining 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 the **Distributions** tab (See Figure 50).
2. Click **Pause Response Collection** (See Figure 50).

![Figure 49 - Closing Survey: Send Button](image)

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 51).

![Figure 50 - Pause Response Collection Window](image)

4. Click **Pause Response Collection** (See Figure 51).

5. The survey will now show a status of **Closed**.

![Figure 51 - Closed Status](image)

**Note:** This will close the **selected active survey**, regardless of if the participant has finished, and will record all answers as **partial data**. This will also close all email sessions.
Exiting KSU Qualtrics

1. To close your KSU Qualtrics session, click your profile icon, in the upper-right corner of the screen (See Figure 52).

![Figure 52 - Exiting Qualtrics](image)

2. Click **Logout** (See Figure 52).
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