The purpose of this training unit is to provide training in an online survey tool known as Qualtrics. Qualtrics is a powerful online survey tool used by many different kinds of professionals to gather data about their products and services. It is also a popular research tool used to gather data from research participants. This is intended to be a very basic training unit designed to give you basic skills in the use of Qualtrics as a means of gathering evaluation data for the purpose of program improvement.
Part 3: Distribution of Surveys............................................................16
  Activate Your Survey .........................................................................16
  Survey Link.........................................................................................17
  Email Your Survey ..............................................................................17
  Using Panels .........................................................................................8
  Import Panel From File........................................................................19
  Distributing To Panel Members ....................................................20
  Sending Your Survey ...........................................................................21
  About Panel Members .........................................................................

Part 4: Reporting and Analysis of Results.........................................3
  Viewing Results....................................................................................23
  Viewing Reports ....................................................................................24
  Filtering Data .......................................................................................25
  Responses .............................................................................................25
  Download Data.....................................................................................26
  Interpretation of Results.....................................................................27

For More Information and Training with Qualtrics.........................28

Self-Check Quiz ....................................................................................28

Independent Practice ............................................................................29
<table>
<thead>
<tr>
<th>LEARNING OUTCOMES</th>
<th>Learners will build, distribute and analyze Qualtrics surveys on a beginner level.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Survey Building:</strong> <em>After this training segment, you will create questions in different formats, edit question text, construct questions that direct participants to different questions based on their previous responses, protect and terminate your survey.</em></td>
</tr>
<tr>
<td></td>
<td><strong>Distribution of Surveys:</strong> <em>After this training segment, you will activate your survey and distribute your survey.</em></td>
</tr>
<tr>
<td></td>
<td><strong>Reporting and Analyzing Survey Data:</strong> <em>After this training segment, you will examine your data in different ways, understand how Qualtrics reports participation and download reports.</em></td>
</tr>
</tbody>
</table>

| Previous Knowledge | Learners must have an active Qualtrics account to participate effectively in the session. If you do not currently have an active Qualtrics account, please complete the account activation process before this training. <Link to Qualtrics account setup instructions> |
Organizational Development
Qualtrics® Online Surveys for Program Evaluation

<table>
<thead>
<tr>
<th>PART 1: SURVEY BUILDING</th>
<th>You will create questions in different formats, edit question text, construct questions that direct participants to different questions based on their previous responses, protect and terminate your survey.</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Surveys Tab</td>
<td>My Surveys Tab: Allows you to see all of the surveys you have developed plus all of the ones that have been shared with you.</td>
</tr>
</tbody>
</table>
Create Survey Tab: Quick survey builder – generally this is where you will start. If you want to copy a survey from one you already have, then use “Create from Copy,” then make the needed edits. You will be asked to give the survey a name. Do not worry about folders unless you plan to have quite a few surveys of different kinds.

A new blank survey looks like this. Click on Create New Item to begin.
**Create Questions**

The default question type will come up on the screen.

**Edit Questions**

Typically used tools:

Rich Text Editor: To open the Rich Text Editor, double click on the question text to open the question for editing, then click on the Rich Text Editor tab. The Rich Text Editor allows you to work with the formatting of your question. It also allows you to insert graphics, images and video to your questions.

When the Rich Text Editor pops up, you will see that you have many of the same options you have while working in any word processing software.
Typically Used Tools:

Piped Text: Piped Text grabs a piece of information from your respondent contact information or from a previous question. You can put someone’s name or the answer from another question into the text of the question you’re working with. You can also use piped text when sending email links out to panel members.
<table>
<thead>
<tr>
<th>Change Item Type</th>
<th>Question types: When you click on a question to edit it, the right hand pane of the editing screen shows the available options for that particular question.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Change item type: Look at the question types. When you click on the green bar to change the item type, you have two options.</td>
</tr>
<tr>
<td></td>
<td>o First, you can scroll over the list to see an example of what that type of question looks like.</td>
</tr>
<tr>
<td></td>
<td>o Second, you have the option of clicking on the dropdown menu next to the question type. This provides you a list of the ways the question can be formatted.</td>
</tr>
<tr>
<td></td>
<td>• Be careful to select the item type that will get you the kinds of answers you will be looking for.</td>
</tr>
<tr>
<td></td>
<td>• The options change depending on the question type.</td>
</tr>
<tr>
<td></td>
<td>You can also preview the question using the Preview Question option at the bottom of the Question Options pane on the right hand side of your screen.</td>
</tr>
</tbody>
</table>
### Create A New Question

Create a Question: The green plus icon adds a question you create yourself. There are three green plus icons. The two at the bottom will add questions after the question that is currently active. The one at the top will add questions before the question that is currently active. The purple plus adds a question from another survey you have created.

![Diagram of question creation in Qualtrics](image)

*These are where "add question" icons are located.*

Remove a Question: If you put in a question you do not want or you are editing a survey and do not want a survey from the version you copied, use Remove a Question. Activate the question by clicking on it, then click the red minus sign to the right of the question box. The question is saved at the bottom of the page in an area called Trash/Unused Questions that you can either reuse or empty.

After adding a new question, you can select the item type, edit the question and make other choices related to how you want the question to appear.
Displaying Optional Questions

Display Logic/Skip Logic: Both of these will conditionally ask certain questions in a survey. For example, if there is a Yes/No question then a follow up “If no, then why?” this is a nice option to skip the follow up question if the respondent answered Yes. Both options work well, but the starting point for inserting the logic is different.

Display Logic: A condition must be met for that particular question to display. So activate that question and set the condition to display the question.

Skip Logic: Start by activating the last question you want shown, then the answer to that question will either skip the survey ahead over some questions or go ahead to the next question.

Do several survey previews to check how your logic works before sending it out! You can preview a survey by clicking the Preview Survey button under the Create Survey Tab.
**Survey Options**

Use Survey Options to control how respondents view and experience your survey. This is below the tabs when you are using Edit Survey.

**Survey Experience:** One you might want to change is the Back Button. The default is that they cannot go back. Clicking the box turns this option on. It will allow respondents to go back to any previous page. If there is survey logic in your survey, this may not work the way you want it to. Test it to see.

**Survey Protection:** It’s usually best to leave these on default, but you may want to check Prevent Ballot Box Stuffing. This will only allow one survey entry from a particular device/ip address. If you think that more than one survey will be taken per device and this would compromise your data, then check this option. If there might be a husband and wife who will fill out the survey using the same home computer, leave this option on default.

**Survey Termination:** It’s usually best to leave these options on default. If you want your respondents to receive a special message from you after completing the survey, you can set that up using End of Survey Message From A Library.
Export Survey

You can export a survey to Word for people to take or for editing purposes. If people take the survey on paper, be sure to enter those responses so you have the data for your own analysis.

Under the Edit Survey tab, Click Advanced Options, Export Survey to Word. This should set up a Word Document that has all of the questions in your survey.
### Part 2: Collaboration

**You will learn to collaborate on surveys within and outside the Texas A&M AgriLife Extension brand.**

#### Collaboration within brand

Under the My Surveys tab, click on the icon labeled Collaborate in the Tasks area of the survey that you would like to share.

You will be asked to enter the name or email address of the person you would like to collaborate with. If they are a registered user of the same ‘brand’ (Texas A&M AgriLife Extension), their name should appear in the window. Click add and designate which task they are allow to use with that survey. Click Save.
Under the My Surveys tab, click on the icon labeled Collaborate in the Tasks area of the survey that you would like to share.

You will be asked to enter the email address of the person you would like to collaborate with, click Add. A message will then pop up with an invitation that will be sent to the person you are attempting to collaborate with. This email will contain a collaboration code to be used.

Enter the collaboration code into the window and click Accept.
END OF PART 2: COLLABORATIONS OF SURVEYS

Questions for Review:

1. (True/False) If a person is not a member of my brand, I cannot collaborate with them.

2. To share and work on my survey with someone else, all I have to click on is:
   a. Distribute Survey
   b. Results
   c. Collaborate
### Part 3: Distribution of surveys

**You will activate your survey and distribute your survey.**

There are two ways to activate a survey.

- **My Surveys:** click the box to the left of the survey title. A green check mark should appear. You will also deactivate a survey from this screen. A popup will ask you to be sure that you want to deactivate.

- **Distribute Survey:** Before a survey can be distributed, it must be activated. So if you try to distribute before activating, a screen will ask you to activate the survey first.

This can be cut and pasted into email and websites. These survey links can be forwarded and used again and again.
Email Customer Link: Under Distribute Survey, you can use the Email Survey option to send respondents a unique link that can only be used once. This will record who has and has not taken the survey. See the section on Panels below for instructions on how to construct a panel, or you can add individuals by clicking on Please Select, then My Library, then New Panel.

History: Distributing a survey using Email Customer Link leaves a history of all the interactions you have with a particular panel including when it was sent, when reminders were sent and whether you have scheduled any other interactions with that panel. The Actions button on the far right will allow you to schedule these interactions.
This is available under the Panels Tab. You have three options when creating a panel.

- **Add Panel Members.** Do this for a completely new panel. When adding panel members, you should have no spaces before or after the information you add into the fields.
- **Import From a File.** This is the option we will use today for practice. If you keep an Excel file of your contacts, it is easy to import them into a Panel.
- **Import from a Survey.** If you have the same panel members as before (for example, with an intention to adopt survey, then a follow up to see if they truly adopted), you might want to import from a survey.

Click the Plus sign to construct a new panel. You will be asked to name the panel. It is wise to name the panel the same as the survey. Don’t worry with Destination Category.

Now select the method you have chosen to create your Panel.
Click on Import from File.

You will be asked to Browse for a CSV file. This means “Comma Separated Values” and Excel files can be saved in this format. When saving an Excel file as a CSV, click the dropdown menu below the FileName bar. Clicking on this will give you a list of file formats to save the file. You should select CSV (MS-DOS) for PC users or CSV (Macintosh) for Mac users. For more about how to set up the file, use the Get Help button or look at the Example Document on the Browse screen. The file must be set up in a particular way to be imported properly and must have all fields filled.

After you select that file, you should have a screen that confirms the fields in the file. Then click Import and “Click here to view your new panel!” You should be able to use this Panel now for survey distribution. The Example File shows exactly how to set up a CSV file in Excel or you can model your file on the Import Panel File used in the training session.
Under Distribute Survey, click on the Email Survey button.

Click the green Please Select button by “To:”. Select your Library and the title of the Panel you provided when you imported or created your panel. You also have the option of selecting the entire panel or a sample from the panel. You will generally want to select the whole panel.

Be sure you have saved your email greeting with the Piped Text and message you want to send. Check the email address you provided. You can change it by editing in the Reply-To Email Address box.
Sending Your Survey

To finalize a mailing, click on the button at the bottom:

![Schedule Mailing]

You can also customize when the mailing will be scheduled using the When button under the To button.

You can also test your message by sending it to yourself. This is a good option if you are just starting out. It is important for you to see what your respondents are getting, and to see whether your Piped Text is working.

About Panel Members

Panel Members: Panelists can unsubscribe from your messages. This shows as a red dot by their names. All members who are receiving your panel messages will show a green dot. You can click on each item to see and edit their information, as well as their history.

You can also distribute the survey by posting it on your social media, and by QR code. See the Qualtrics Help for assistance with these methods of distribution.

END OF PART 3: DISTRIBUTION OF SURVEYS

Questions for Review:

3. (True/False) If my survey is not activated before I try to distribute it, then Qualtrics will ask me to activate it before I distribute it.

4. If I want to know exactly who has taken my survey and who has not so I can send out reminders, I need to distribute my survey by
   a. Using a cut-and-paste link onto a website.
   b. Using the Email Survey button and creating a panel.
   c. Posting a link onto my Facebook page.
5. When I Import a Panel, Qualtrics will import files that
   a. Are saved in CSV format.
   b. Have all required fields filled.
   c. Both of the above.

6. To finalize a mailing to a panel, I must
   a. Save the panel as a CSV file
   b. Not allow respondents unsubscribe from my messages
   c. Click on Schedule Mailing
PART 4: REPORTING AND ANALYSIS OF RESULTS

After this training segment, you will examine your data in different ways, understand how Qualtrics® reports participation and download reports.

Viewing Results

Under the View Results tab, you will have four buttons that appear, and you will likely use 2 of them regularly.

- View Reports: Click on Initial Report, and a summary of your data will appear. Each question is on one page, click “Next Page” to see the next questions or click on a question in the left hand pane.

- Responses: Under View Results tab, you have the option of viewing individual responses. If you distributed the survey using a panel, you will be able to see the panel information along with each panelist's responses.
  - If you preview a survey, the preview responses are recorded. These previewed responses should be deleted from the data set before you begin to analyze the data.
  - This can be accomplished by viewing Responses. Qualtrics notifies you of which responses are preview responses. You can delete these by clicking on the box to the left of the Response ID then clicking the red Delete.
Viewing Reports

By clicking View Reports and then selecting Initial Report, you can see data from the survey.

There are two ways to navigate the report:

- Clicking Next Page
- Clicking on the questions on the left hand pane.

You can also add graphs to your report. Remember that there are appropriate and inappropriate ways to present certain kinds of data. It is our responsibility to present data in a way that fairly represents the results.
### Filtering Data

Filters: Clicking on one response allows you to see the responses provided by only the people that selected that response. This allows you to see how one particular group of people) responded to the rest of the questions. For example, you can look at only the answers of those who responded “Yes” to the question about making a change because of this activity. Filtering according to a question immediately changes the rest of the report.

Be sure that the filter is set properly by using the options below “If”

[Image of a filtered report with instructions on how to check if filtering options are set properly.]

### Responses

**Recorded/In Progress:**

- Responses that are recorded are responses that are completed by the respondent. This means that respondents made it to the end of the survey, but not that they answered all of the questions.
- Responses that are in-progress are responses that are not completed by the respondent, or they did not get to the end of the survey. You can set a time frame for closing out these responses, or you can deactivate the survey to capture incomplete but in-progress responses. These responses then become part of the data.
- Filtered Responses tells you how many responses meet a filter criterion.
Download Data

You can download any report, filtered or unfiltered. Graphs export as pictures. They cannot be edited in Word. If you want to edit a graph, export the table to Excel then use that to create a graph that is editable. You can also export a graph or table under Graph Actions or Table Actions which activates as you scroll across the graph or table.
Interpretation of Results

The goal of evaluation is to improve what you’re doing as well as to collect data about how well your program is doing and to get a clearer picture about your skills as an educator.

What could this presenter do to improve the results of this evaluation?

A. Do you notice any areas that are inconsistent?

B. What areas are low across the board? What can be done to boost the score in that area?

C. What areas are high across the board? Can anything be shortened because participants already have a lot of knowledge?

END OF PART 3: REPORTING AND ANALYSIS OF RESULTS

Questions for Review:

1. To view the individual answers of one respondent, I need to click
   a. The Responses button under the View Results Tab.
   b. View Responses in under the Panels Tab.
   c. The View Reports button under the View Results Tab.

2. (True/False) I can add a graph to my report using the Add Graph button.

3. Filtering a report allows me to look at data
   a. As a percentage of the whole.
   b. From only the respondents who provided certain answers I’m interested in.
   c. In the same way that OD would provide to me in a written summary.

4. The point of analyzing evaluation reports is to
   a. Prove my strengths as an educator.
   b. Have solid results to report about my program’s outcomes.
   c. Making improvements to my already awesome program.
   d. All of the above
FOR MORE INFORMATION AND TRAINING WITH QUALTRICS

All Help topics can be viewed by clicking the yellow "Get Help" button on the right hand side of the page.

Qualtrics also provides training webinars and recorded training sessions for users to develop more advanced skill

SELF-CHECK QUIZ

You can check your knowledge about this training segment by taking the self assessment quiz that will be sent to you during the break between sessions.
### INDEPENDENT PRACTICE

Team up in groups of 2-3 people to complete the following exercise:

1. Begin a Qualtrics survey using questions you are interested in knowing. You might choose to use a form from the scan forms section of the OD website.

2. Share the survey with all of your team members using the Collaborate button under My Surveys.

3. Your survey must have:
   a. At least 3 different question types.
   b. One skip logic/display logic.
   c. At least 8 questions but not more than 12 questions (to respect the time constraints of this training session).

4. Distribute to the panel we have sent you that includes today’s training group.

5. Take your own survey and the other surveys sent to you by members of this training group.

6. With your group, analyze your data and try to determine what decision for program improvement could be made based on your data.

We will be available for help and support as you practice your online survey development skills.