# QUALTRICS SURVEY RESEARCH SUITE

## At CSU Stanislaus

Created by:

*Kelli Payne*

*Lisa Medina*

*Office of Institutional Research Survey Team*

# Objectives

- Introduce **Qualtrics Survey Research Suite** tool including common uses

- Review **types of user accounts** at CSU Stanislaus

- Share CSU Stanislaus **Qualtrics Terms of Use** and rationale

- Present brief overview of Qualtrics **main features and functionality**

- Provide information about **additional resources** available from Qualtrics and CSU Stanislaus

- Discuss **services available** at CSU Stanislaus including the **Levels of Survey Project Support Services**

- **Q&A**

# Why Qualtrics?

- **Easy** - Anyone can build, send and analyze surveys. Qualtrics can do things that take hours in other products. Crazy questions? Dizzying logics? Loads of randomizations?

- **Sophisticated** - Superior technology. If you can think it, Qualtrics can build it. Qualtrics never stops improving, constantly adding new features to match the latest breakthroughs in survey research.

- **Customize everything** - Control text, questions, messages, choices, reports, graphs, images, colors, exports, code, emails, fonts, skins, sharing, panels, logics, blocks, and…well…pretty much anything else you could imagine.

- **Product support –** Free and live support. No phone tree. Rings throughout.

- **Collaboration is a breeze** - Collaborate in real-time – across the office or across campuses. Grant anyone access to surveys and reports. Keep your research consistent and efficient.

- **Web-based** - No software to install. Access your surveys and data from any location any time you need.
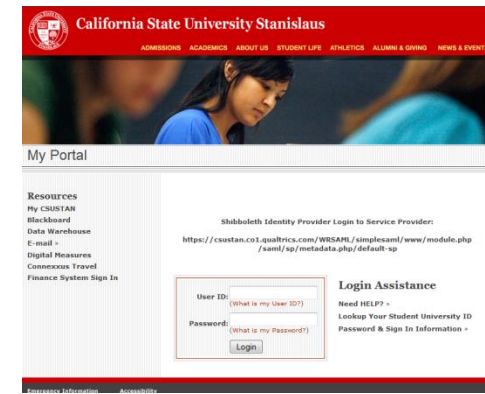
# Common Uses

- Applications and admissions

- Assessment research

- Customer satisfaction

- Classroom research

- Course evaluations

- Polls or election ballots

- Research, scholarly, and creative activities involving survey research or experimental research

- Tests and quizzes

# User Accounts

**Collaborated with Office of Information Technology to interface Qualtrics with university single sign-on authentication system.**

<u>**User account are based on university affiliations:**</u>

- **Faculty/Staff/Administrators (Standard Qualtrics)**
  - Accounts will remain active until user is separated from the university.

- **Student (Sponsored Student Accounts)**
  - A reduced feature set
  - Requires collaboration with the faculty or staff sponsor.
  - To improve efficiency, faculty sponsor should contact IR to add permissions/make changes; not the individual students.
    - **Classroom:** Faculty may elect to have students create user accounts for a class project.
    - **Student Assistant Employee:** Staff can sponsor a Qualtrics account for a student employee.
    - **Master's and Doctoral Students:** Graduate student working on a master's thesis or doctoral research may create a Qualtrics user account.

---

California State University Stanislaus

ADMISSIONS   ACADEMICS   ABOUT US   STUDENT LIFE   ATHLETICS   ALUMNI & GIVING   NEWS & EVENTS

My Portal

Resources
My CSUSTAN
Blackboard
Data Warehouse
E-mail »
Digital Measures
Connexxus Travel
Finance System Sign In

Shibboleth Identity Provider Login to Service Provider:
https://csustan.co1.qualtrics.com/WRSAML/simplesaml/www/module.php/saml/sp/metadata.php/default-sp

User ID:   [What is my User ID?]
Password:   [What is my Password?]
Login

Login Assistance

Need HELP? »
Lookup Your Student University ID
Password & Sign In Information »

Emergency Information   Accessibility

---

**Edit User Type: Student Account**

| | Enabled | Disabled | | Enabled | Disabled |
|---|---|---|---|---|---|
| Access Polls | ✓ | ☐ | Set Survey Options | ✓ | ☐ |
| Send System Message | ☐ | ✓ | Create Response Sets | ✓ | ☐ |
| Ignore Non-Accessible Surveys | ✓ | ☐ | Distribute Surveys | ☐ | ✓ |
| Access API | ✓ | ✓ | View Survey Results | ✓ | ☐ |
| Use Offline Mobile App | ☐ | ✓ | Export Survey Data | ✓ | ☐ |
| Access Panel Provider API | ☐ | ✓ | Edit Survey Results | ✓ | ☐ |
| Salesforce Integration | ☐ | ✓ | Copy Survey Questions | ✓ | ☐ |
| Adobe SiteCatalyst Integration | ☐ | ✓ | Delete Survey Questions | ✓ | ☐ |
| Access Organization Address Book | ☐ | ✓ | Edit Survey Flow | ✓ | ☐ |
| Allow JavaScript | ✓ | ☐ | Edit Survey Questions | ✓ | ☐ |
| Allow All HTML Markup | ✓ | ☐ | Use Blocks | ✓ | ☐ |
| Translate Surveys with Google Translate | ✓ | ☐ | Use Conjoint | ✓ | ☐ |
| Export Reports to File | ✓ | ☐ | Use Triggers | ✓ | ☐ |
| Enable Public Reports | ✓ | ☐ | Use Advanced Quotas | ✓ | ☐ |
| | | | Use Table Of Contents | ✓ | ☐ |
| Total Allowed Surveys | 20 | Unset Restriction | Use Screen-outs | ✓ | ☐ |
| Allowed Active Surveys | 20 | Unset Restriction | Use Cross Tabs | ✓ | ☐ |
| Allowed Responses | 5,000 | Unset Restriction | Use Subgroup Analysis | ✓ | ☐ |
| Allowed Outgoing Emails | 1,000 | Unset Restriction | View Response ID | ✓ | ☐ |
| Allowed IP Addresses | Unlimited | Override | View Personal Data | ✓ | ☐ |

Allowed Responses per Survey   Unlimited  Override
Allowed Questions per Survey   Unlimited  Override

| Library Permissions | Enabled | Disabled |
|---|---|---|
| Use Library Surveys | ✓ | ☐ |
| Use Library Blocks | ☐ | ✓ |
| Use Library Questions | ✓ | ☐ |
| Use Library Messages | ✓ | ☐ |
| Use Library Graphics | ✓ | ☐ |
| Use Color Groups | ✓ | ☐ |
| Use Library Files | ✓ | ☐ |
| Use Panels | ☐ | ✓ |
| Use Panel Samples | ☐ | ✓ |
| Manage Library Surveys | ✓ | ☐ |
| Manage Library Blocks | ☐ | ✓ |
| Manage Library Questions | ✓ | ☐ |
| Manage Library Messages | ✓ | ☐ |

| Skin Permissions | Enabled | Disabled |
|---|---|---|
| **CSU Stanislaus - One Question Per Page** | | |
| CSU Stanislaus 1 | ✓ | ☐ |
| **CSU Stanislaus - Multiple Questions Per Page** | | |
| CSU Stanislaus 1 | ✓ | ☐ |
| **Qualtrics - One Question Per Page** | | |
| BusinessBlue (Mobile Compatible) | ✓ | ☐ |
| Plain Jane wide (900px) (Mobile Compatible) | ✓ | ☐ |
| Business | ✓ | ☐ |
| BusinessEmbedded400 (Mobile | ✓ | ☐ |

# Terms of Use Policy

**Developed internally**
- Office of Information Technology (OIT)
- University Institutional Review Board (UIRB), FERPA, and HIPAA compliant
- http://www.csustan.edu/IR/QualtricsTermsofUsePolicy.html

**Rationale**
- **Protect the rights of privacy** of the participants and respondents.
- Avoid **harming or misleading** respondents.
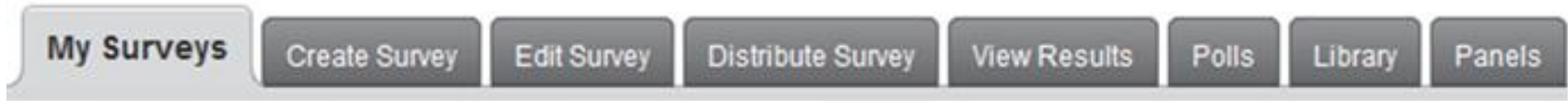- Avoid the **fraudulent use** of resources.

**Policy**
- **Faculty** and **staff** are **responsible for use of Qualtrics among their students.**
- **Non-university related activities is prohibited**.
- Users **will not SPAM** or use other forms of unsolicited mass communication in conjunction with Qualtrics.

**Consequences**
- Inappropriate behavior/content/usage or other abuse of your Qualtrics account.

# Main Features and Functionality

# Tabs and Shortcut Buttons

| My Surveys | Create Survey | Edit Survey | Distribute Survey | View Results | Polls | Library | Panels |

- **My Surveys Tab**
  - Homepage
- **Shortcut buttons**
  - Create Survey
  - Email Survey
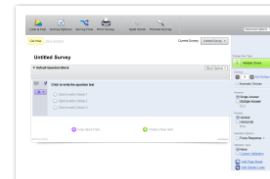  - View Results
  - Message Center

- **Tasks**
  - Edit
  - Results
  - View
  - Collaborate
  - Copy
  - Translate
  - Delete

# Building a survey

- **Create survey**
  - Build or copy

- **Edit survey**
  - Build questions from over 100 different question types
  - Format and customize questions
  - Apply question and survey options
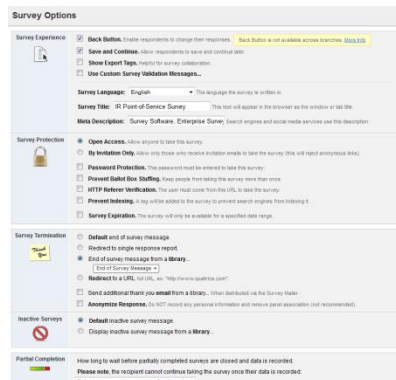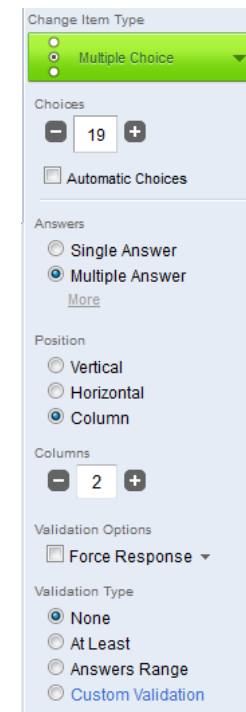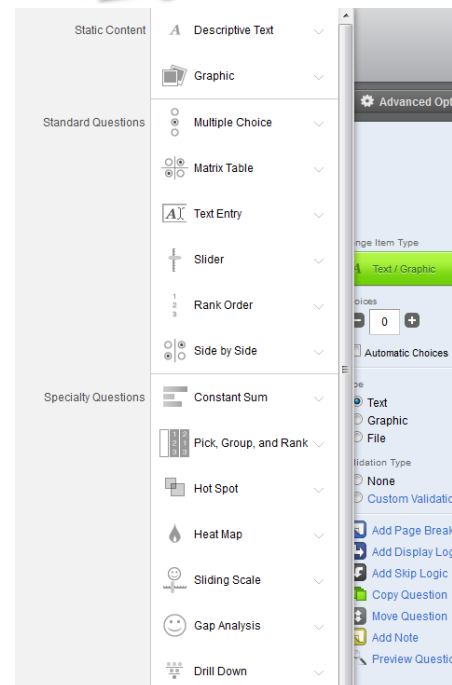
# Distributing a survey



- **Basic Distribution**

  - Anonymous survey link

  - Email customized link using the Qualtrics Mailer

- **Panels**

- Mailing or distribution list

- Embedded data
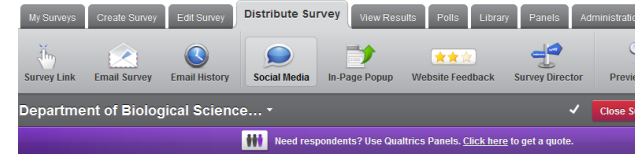
- **More Distribution Methods**

  - Social Media

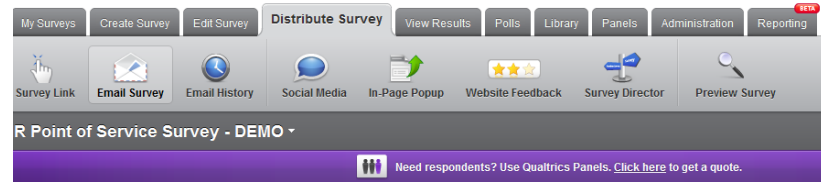  - In-page Pop-up

  - Website Feedback
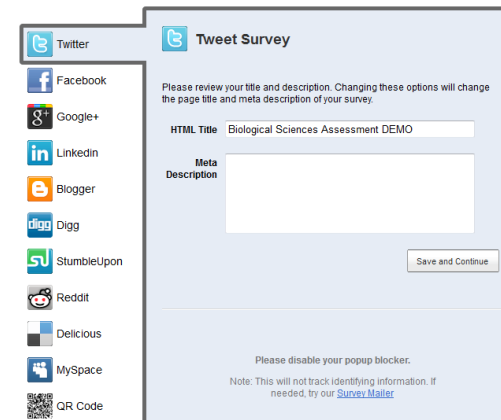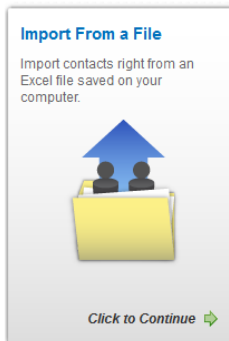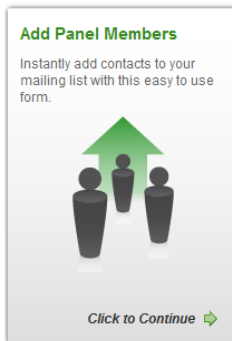
# View results

- **View Reports**
  - Filter and drill down
  - Export and share

- **Responses**
  - Recorded Responses and Responses In Progress
  - Retake Survey link

- **Download Data**

  - .CSV, SPSS, etc...

- **Data Analysis & Crosstabs**

# Additional Resources

# Learning the System

- **On-campus training**
  - Office of Institutional Research offers customized training sessions to address any unique or specific training needs not covered in the Qualtrics online training.

- **Qualtrics Resources**
  - Qualtrics provides complimentary training, support and online resources to help you learn the Research Suite.

  - Qualtrics University website:
    - Online Training Program
    - Basic and Getting Started
    - Data Analysis Guides
    - Downloadable eBooks
    - Reference Guides
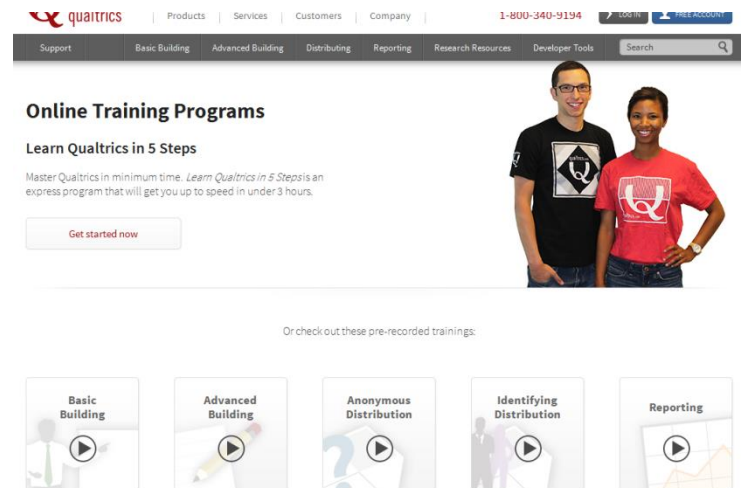
# Support

- **On-campus support - Office of Institutional Research Survey Team**
  - Email the IR Survey Team: ir-qualtrics@csustan.edu
  - Visit the IR Qualtrics Survey Software webpage: http://www.csustan.edu/IR/QualtricsSurveySoftware.html
- **System help**
  - The yellow *"Help and Tutorial"* link within the Qualtrics system that will direct you to all of the helps that are available.  [Help and Tutorials]
- **Qualtrics support**
  - Call 801.340.9194
  - Email support@qualtrics.com
  - Tweet questions @qualtrics
  - Facebook at www.facebook.com/qualtrics
  - LinkedIn (Qualtrics Users) www.linkedin.com

# Survey Project Support Services

# Levels of Survey Project Support Services



Level 3
Research Partnership

Level 2
Technical Assistance

Level 1
Consultation and Support

# Consultation and Support (Level 1)

- What are the **objectives** of the survey?
  - Does the objective fit with the University Strategic Plan?
  - What are the critical questions to be answered?
  - Is a survey the appropriate data collection method?
  - Why is this study important? *"Will the juice be worth the squeeze?"* (Terenzini, 2013)

- What **information do you need** to answer your question(s)?
  - Does the information already exist? (e.g., existing survey data, institutional data)

- How will the **results be used**?
  - Who will be the audience for the results?
  - Who will be affected by the results?
  - Can the results be responded to proactively?

- How much **time** is needed?
  - Define topic
  - Identify the population and select sample
  - Develop instrument
  - Obtain IRB approval, if necessary
  - Pilot test the survey
  - Administer/ distribute the survey; plan for follow-up
  - Analyze, interpret, and report
  - Make decisions or implement change

# Technical Assistance (Level 2)

- Providing **access to** and **resources** for Qualtrics

- **Basic** training

- Assist with **basic building** of the survey instrument in Qualtrics

- Survey **management**
  - Distribution, including uploading panels/distribution lists
  - Monitor survey progress
  - Send reminders and thank-you messages

- **Basic** statistical analysis

# Research Partnership (Level 3)

- Full consultation and support services

- Help client collect **usable survey data** that is *"sufficiently accurate, timely, and collected systematically."* (McLaghlin & Howard, 2004)

- **Identify and define concepts**

  - *"An approximate answer to the <u>right question</u> is worth a great deal more than a precise answer to the wrong question."* (Tukey, J. as cited in Suskie, 1996)

- **Collect data**

  - Survey development; basic and advanced building of the survey instrument in Qualtrics

  - Survey management

- **Restructure** and **analyze data**

  - Quantitative and qualitative analysis, peer group and/or trend analyses

  - Bring in data from other sources (e.g., ERS data, ArcGIS data)

- **Deliver** and **report** information

  - Reporting, including feedback on draft articles, texts, or presentations

  - Support interpretations of the results -

- **Use** and **influence knowledge**

  - Help to determine the changes and the possible outcomes of the changes.

  - *"Joint participants"* in decision-making (Leimer, 2012)

# References

Leimer, C. (2012). Organizing for Evidence-Based Decision Making and Improvement, Change: The Magazine of Higher Learning, 44(4), 45-51, doi: 10.1080/00091383.2012.691865

McLaughlin, G. W., & Howard, R. D. (2004). Chapter 1: Making Data Usable. In People, processes, and managing data (2nd ed., Resources for Institutional Research, No.11). Tallahassee, FL: Association for Institutional Research.

Suskie, L. A. (1996). Questionnaire survey research: What works (2nd ed., Resources for Institutional Research, No. 6). Tallahassee, FL: Association for Institutional Research.

Terenzini, P. T. (2013). "On the Nature of Institutional Research" Revisited: Plus ça Change… ? Research in Higher Education, 54(2), 137-148. doi: 10.1007/s11162-012-9274-3

# Q&A

# Thank you!